## **Time-Based Notifications**

12/04/2024 4:10 pm CST

## **Time-Based Notifications**

Step 1: Locate the "Notification Manager" via the "Module Options" button on the plan level dashboard. This can also be located via the "Wolters Kluwer" button on the homepage after login. Keep in mind that notifications and alerts are set at the global level so they will be the same for all of your plans.

	Module Options 🔻
	Edit Document Templates
	Open Participant Portal
	Global Dashboard
	Distributions Specifications Upload
	Status Manager
pen	Notifications Manager
pen	

😉. Wolters Kluwer	Select a Plan
🚮 Home	
🔒 Edit Profile	lan Search
Company / Plan Batches ftwClient Manager	Company: Name or ID Plan: DTS
Distribution Tracking	Global Dashboard
ftwPortal Pro Reports	<ul> <li>Distributions Specifications Upload</li> <li>Status Manager</li> </ul>
Downloads Administrative Tasks	Notifications Manager     Distribution Company AdminPartMaster Te
🔞 Support	Distribution Company (ID: DITS1) Distribution Company AdminPartMaster Te
TAG (Technical Answer Group)	Distribution Company (ID: DITS1) — Distribution Company AdminPartMaster Te
📕 Log Out	Distribution Company (ID: DITS1)

What are Time-based Notifications and Alerts?- Time-based notifications are based on a number of days from a selected date. You indicate when the clock should start and then the number of days until your email notification and alert. You can also include a reminder if your distribution has not yet been addressed.

By default, the software will come with some time-based notifications activated. Please note that you can turn these off by using the "On/Off" toggle in the manager. You can also delete any notifications that you create or override what you initially set-up.

Step 1: In order to set-up a time-based notification, you will first need to give the notification a description. This is

what will appear in your email notification. You will then need to indicate which statuses the notification can be linked to. For example, if you indicate that the notification should only triggered for "Needs Participant Input" that notification will only work when the Distribution status is set to "Needs Participant Input". The notification will not work on any other status.

## Time-based Notifications



Step 2: When should the clock start? Now that you've given the notification a description and linked it with statuses, you will need to indicate when the clock should start and then the number of days until the notification and reminder.

Date Field	# of days	# of days until reminder	_
Last Update	1	1	
Date Started Date Initiated	5	7	1
Last Status Update Last Update	0	1	1
Last Day Worked			

You have 5 options for when the clock should start:

- Date Started This is the date that you invited your first party to the portal for data collection.
- Date Initiated This is the date that the distribution record was created.
- Last Status Update This is the last time the distribution status was updated.
- Last Update This is the date that the distribution record was last updated in general.
- Last Day Worked This is the date you indicated in the distribution record for Last Day Worked.

Once you have chosen the date for the clock to start, you must choose the number of days from that date to receive your email notification. If you want to be reminded again after a certain number of days, indicate the number of days until reminder in the next column.

Step 3: Next, you'll want to decide if you want to include an alert with your notification. Alerts appear as a red flag on your dashboards. When you open a distribution record, you will also see a red flag on the right of the summary with text indicating why the alert appears.

Include Alert	Alert Text
⊖ Yes ⊖ No	
⊖ Yes ⊖ No	
● Yes 〇 No	Check Alerts
● Yes 〇 No	Unresponsive

If you want to include an alert, select the "Yes" radio button and then indicate the "Alert Text" in the next column. This is the text that will appear in your Distribution Summary.

Step 4: Now it's time to select your email template. You should see a drop down box full of templates for the TPA, Plan Sponsor, and Participant. If you choose a template from the drop down menu, this will tell the software that you want to send an email notification to this party. If you do not select an email template, a notification will not be sent. This is the template the software will use when delivering an email notification to your inbox.

TPA Email Template   🕦	Sponsor Email Template   🕦	Participant Email Template   🕦	
Default Time-Based 🔹	Select a template 🔹	Select a template 🔹	
Default Time-Based 🔹	Select a template 🔹	Select a template 🔹	
Time-based TPA/User 🔻	Select a template 🔹	Select a template 🔹	
Time-based TPA/User 🔻	Select a template 🔹	Select a template 🔹	

In order to edit email templates, you must be a Designated Admin or the Master User on the account to access the Global Email Settings via the Wolters Kluwer button from the home screen.

S. Wolters Kluwer	Select a Plan		-
A Edit Profile	lan Search		
Company / Plan Batches ftwClient Manager Distribution Tracking	Company: Name or ID Plan: DTS		
ftwPortal Pro Reports Downloads	earch Results		
Administrative Tasks     Support     TAG (Technical Answer Group)	Portal / Workflow     Create Custom Checklist Edit Checks     Global Document Print Settings	Global Email Settings Edit dule Admins Portal Branding	DTS
Log Out No Required Amendments for 2014 - <b>10/30/2014</b>	SAR/AFN Print Settings Defaults	Portal Correspondence Edit Contact Types Edit Document Classifications	
COBRA Notices Updated; Cafeteria Plan Carryover and Election Modification Amendment Now Available; Changes Incorporated Into	Logged In Users Divisions Users User Groups/Roles	View Portal Data Usage	
PPA Document Mapping to Administration Software Released - <b>09/11/2014</b>	View Online Usage Agreement DTS Specifications Upload Test 3 Sample DTS Company Sample DTS Company HRA Sample DTS Company	]	
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Make sure that you are on the Distributions tab and then use the "Edit" link next to the template options to edit your templates. Whatever you have selected in the drop down menu will be your default template, but this can be changed via the "Notification Manager".

## Global Email Settings Select Division: DEFAULT •

Email/Serve	er Settings		Select an Email to Edit		
			Email Name	Default Template	Edit
Emai	Lustom Language:	No 🔻	Data-Based	Default Data-Based	Edit
LIIIdi	From Name:	Specify a Server	Force Out	Default Force Out	Edit
	*Editable:	Yes v	Participant Invitation	Default Participant Invitatic <b>v</b>	Edit
	From Email:	MMTESTCO1@ftwilliam.com	Participant Portal Invitation	Default Participant Portal I	Edit
	*Editable:	No 🔻	Plan Sponsor Invitation	Default Plan Sponsor Invit; ▼	Edit
	Reply To:		Spousal Consent	Default Spousal Consent 🔻	Edit
	*Editable:	No 🔻	Time-Based	Default Time-Based 🔹	Edit
	CC:				
	*Editable:	No			
	*Editable:				
	SMTP Server:	mail dedicated computing con			
	**SMTP Port:				
s	ecure Connection:	None 🔻			
	Username:	Distributions@ftwilliam.com			
	Password:	•••••			
*Marking a value for th chooses th	i field as 'Editable' wi his field. Default setti eir own value.	I allow preparers to choose their own ngs will not be updated if a preparer	₽ ₽		
**Port 25 vould like	will be used if left bla to use a port other th	ınk. Please contact support if you nan 25, 465, 587, or 2525.			
		Save Settings		Edit Templates	Save Settings