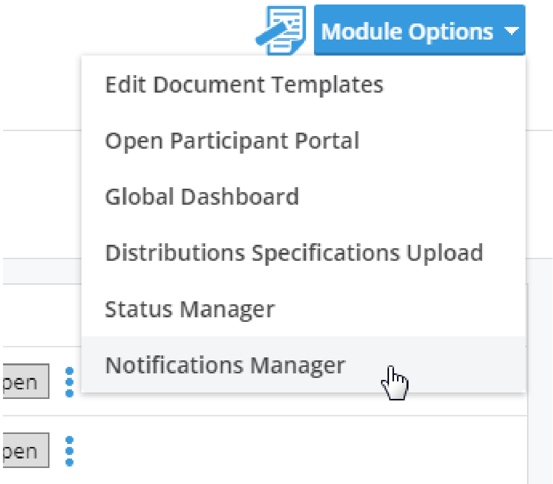
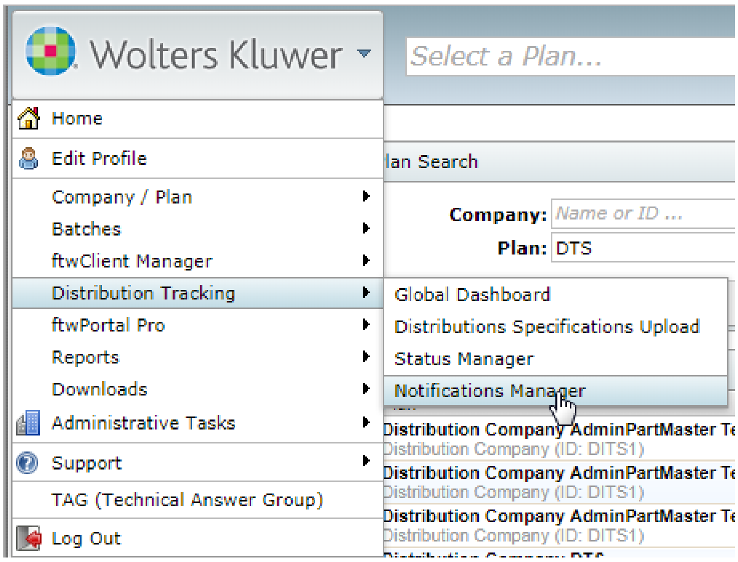
Time-Based Notifications

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.

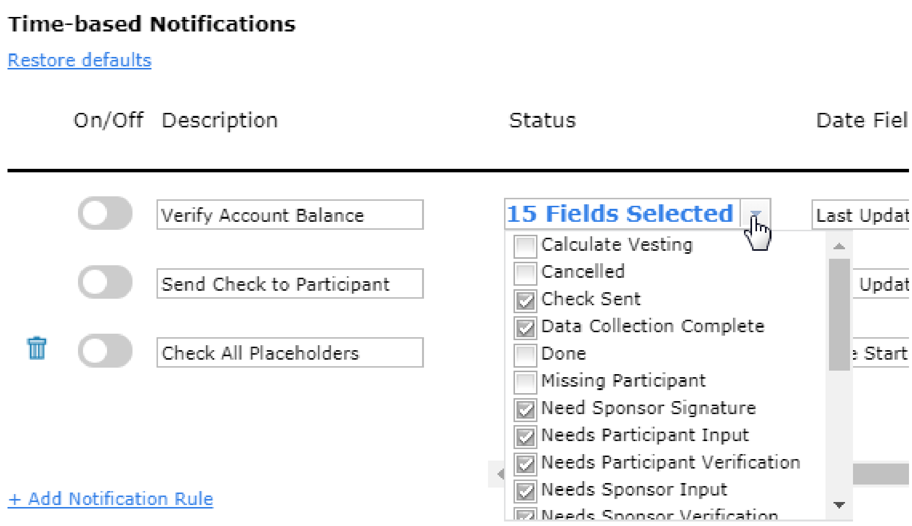




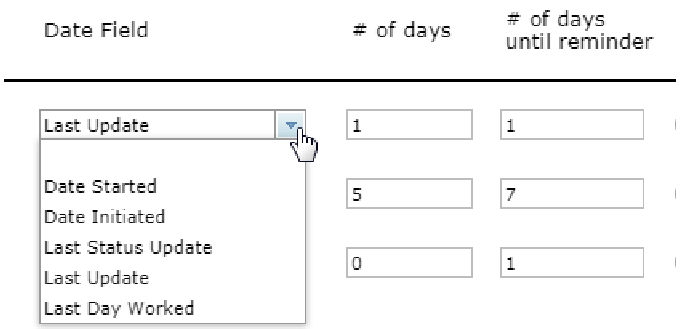
What are Time-based Notifications and Alerts?– Time-based notifications are based on a number of days from a selected date. You indicate when the clock should start and then the number of days until your email notification and alert. You can also include a reminder if your distribution has not yet been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



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.

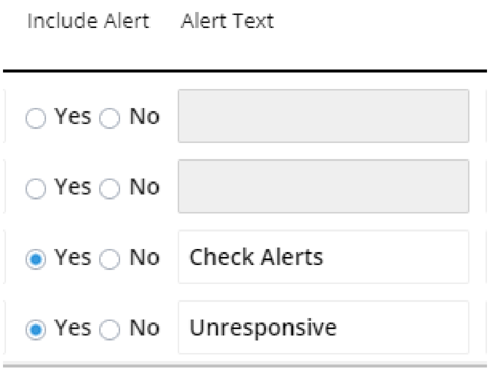


You have 5 options for when the clock should start:

- 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.

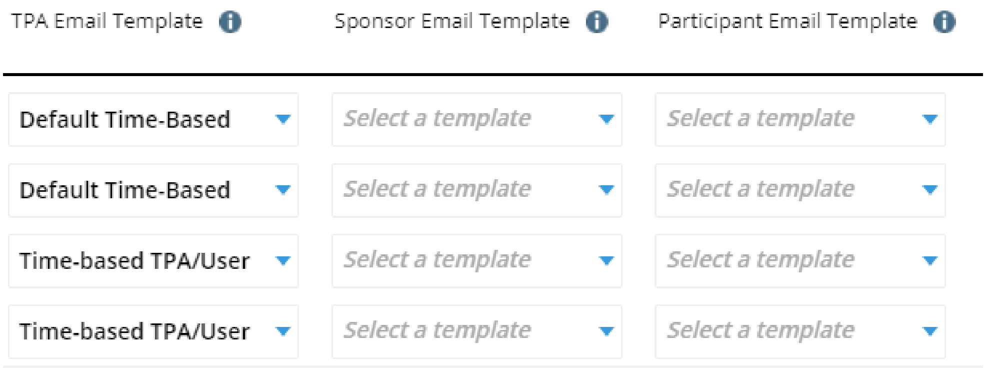
Once you have chosen the date for the clock to start, you must choose the number of days from that date to receive your email notification. If you want to be reminded again after a certain number of days, indicate the number of days until reminder in the next column.

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 side of the summary with text indicating why the alert appears.

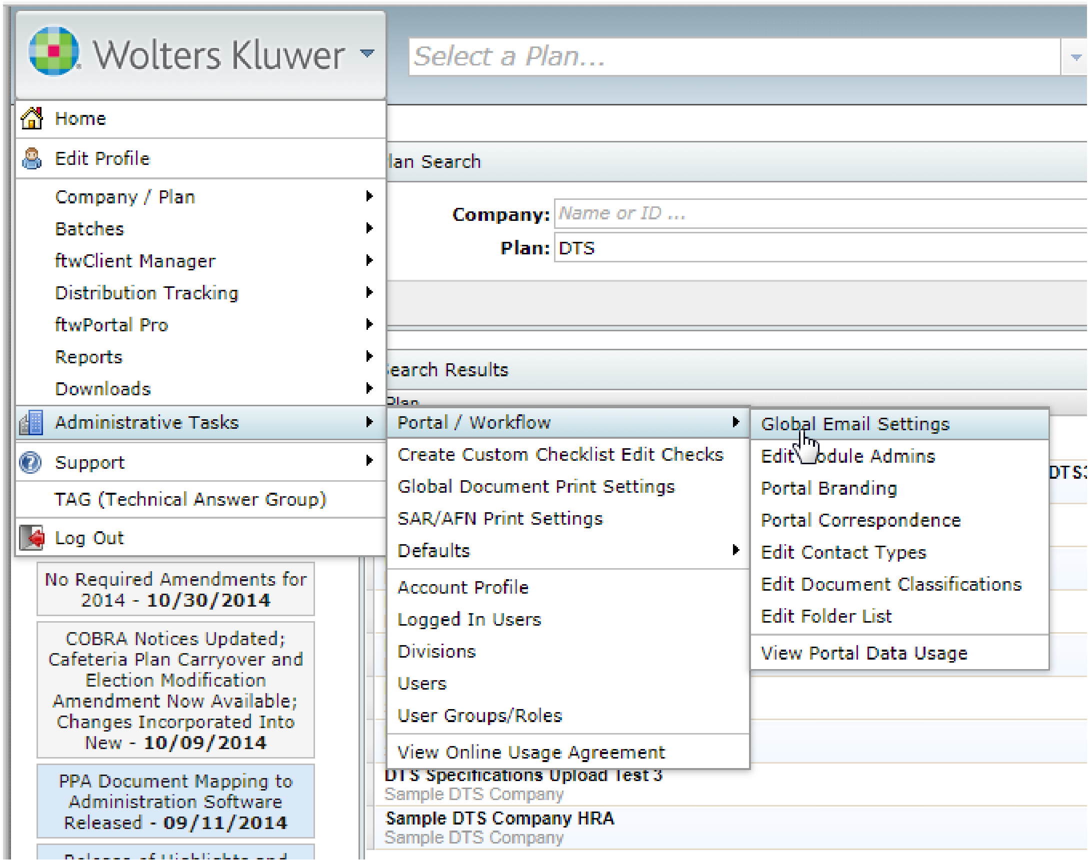


If you want to include an alert, select the “Yes” radio button and then indicate the “Alert Text” in the next column. This is the text that will appear in your Distribution Summary.

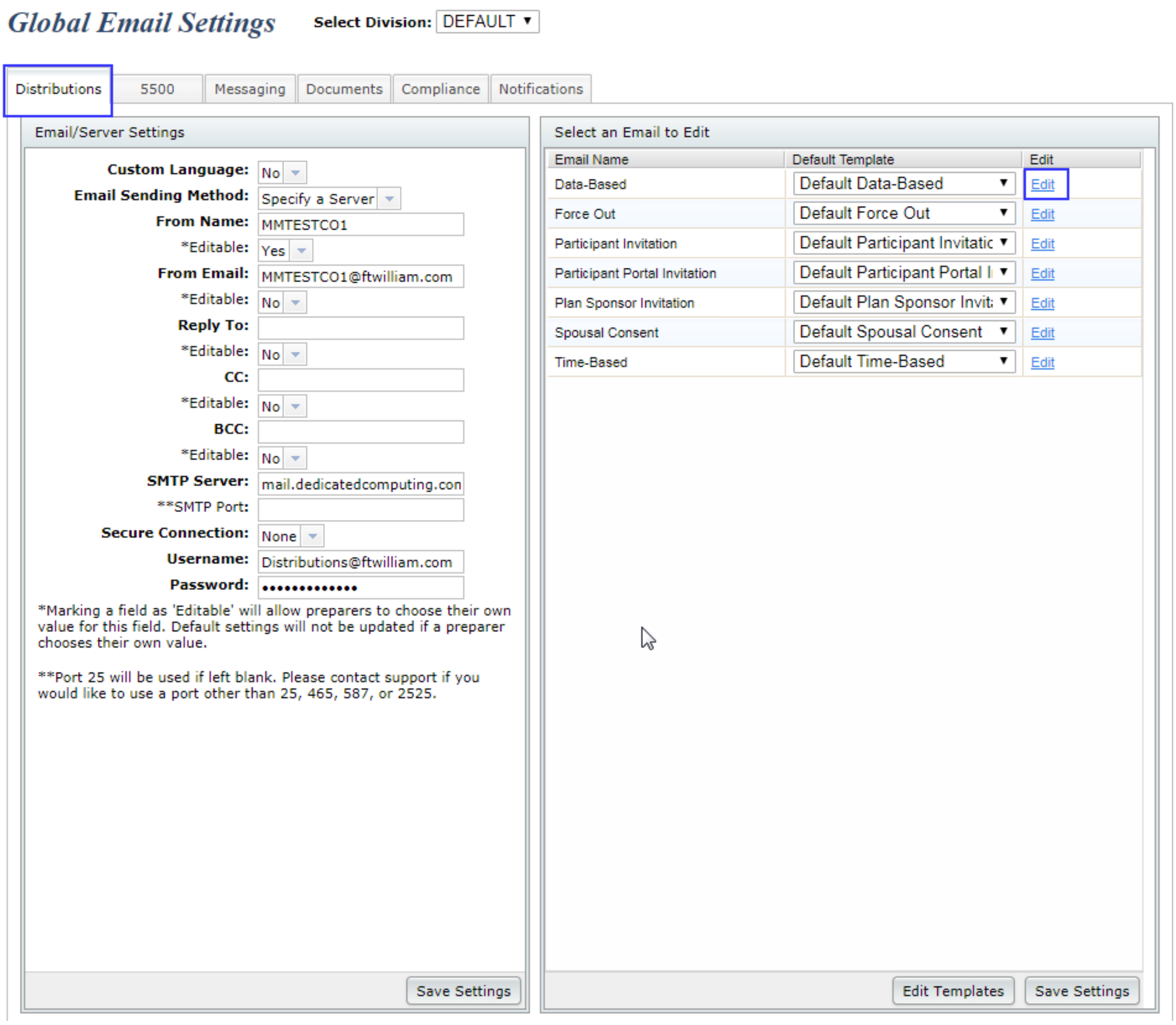
Step 4: Now it’s time to select your email template. You should see a drop down box full of templates for the TPA, Plan Sponsor, and Participant. If you choose a template from the drop down menu, this will tell the software that you want to send an email notification to this party. If you do not select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



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.



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
Distributions
5500
Messaging
Documents
Compliance
Notifications
Email/Server Settings
Custom Language: No
Email Sending Method: Specify a Server
From Name: MMTESTCO1
*Editable: Yes
From Email: MMTESTCO1@ftwilliam.com
*Editable: No
Reply To:
*Editable: No
CC:
*Editable: No
BCC:
*Editable: No
SMTP Server: mail.dedicatedcomputing.con
**SMTP Port:
Secure Connection: None
Username: Distributions@ftwilliam.com
Password: •••••••••••••
*Marking a field as 'Editable' will allow preparers to choose their own value for this field. Default settings will not be updated if a preparer chooses their own value.
**Port 25 will be used if left blank. Please contact support if you would like to use a port other than 25, 465, 587, or 2525.
Save Settings
Select an Email to Edit
Email Name
Default Template
Edit
Data-Based
Default Data-Based
Edit
Force Out
Default Force Out
Edit
Participant Invitation
Default Participant Invitatic
Edit
Participant Portal Invitation
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Time-Based
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Edit
Edit Templates
Save Settings