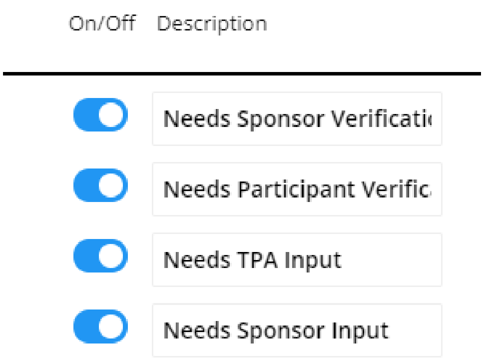
Data-Based Notifications

12/04/2024 4:11 pm CST

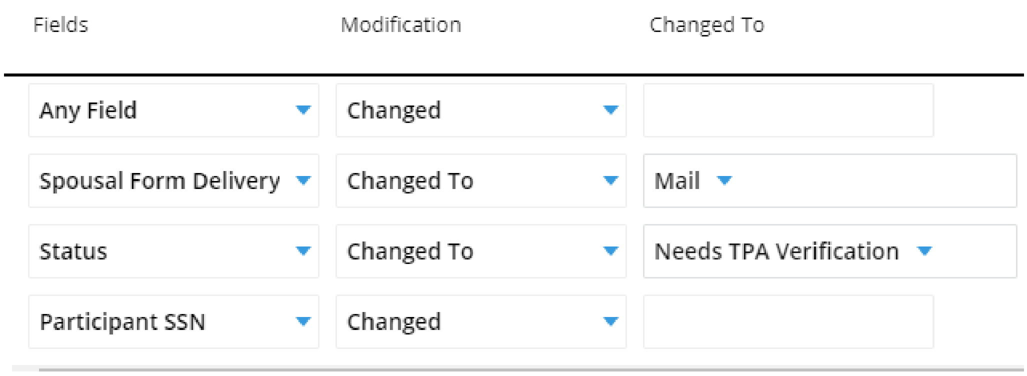
What are data-based notifications? Data-based notifications are used to notify you any time data changes within the distribution record. The most common data-based notification is a status change. By default, the software will come with some data-based notifications already activated. Please note that 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: Give your notification a description. You can do this in the text box under the "Description" column.

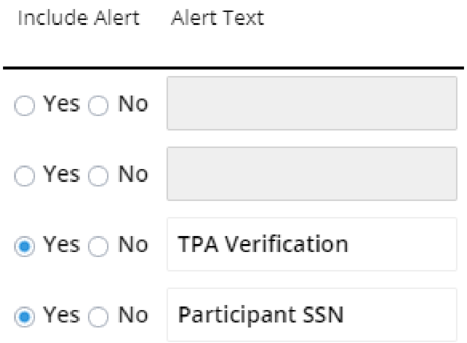


Step 2: Now you should indicate which data fields your notification is tied to, as well as the type of change and if it's for a specific change.

In the "Fields" column, you'll find a drop down list for every piece of data that can be collected within the data collection form. Indicate which field your notification is tied to. Next, you'll want to indicate if you want a notification for a change in general or if the change is to something specific. If the change is specific, choose the "Changed To" option and then indicate what your data should be changed to in the "Changed To" column in order to trigger the notification.



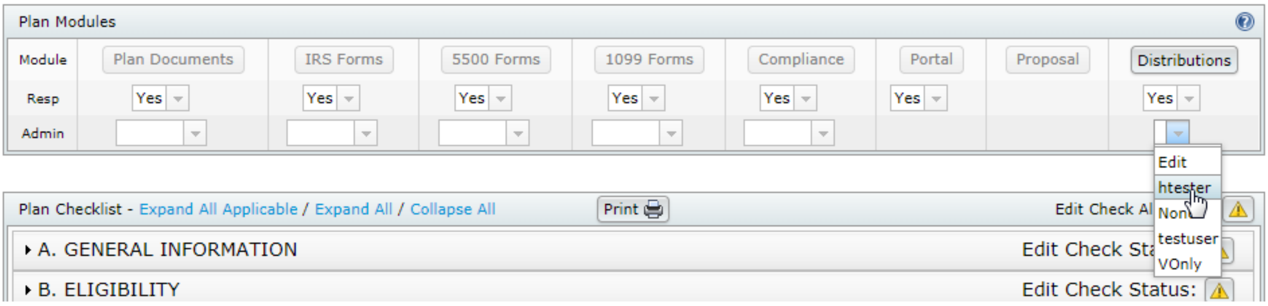
Step 3: Next you'll want to decide if you want to include an alert with your notification. Alerts appear as a red flag on your dashboards. When you open a distribution record, you will also see a red flag on the right side of the summary with text indicating why the alert appears.

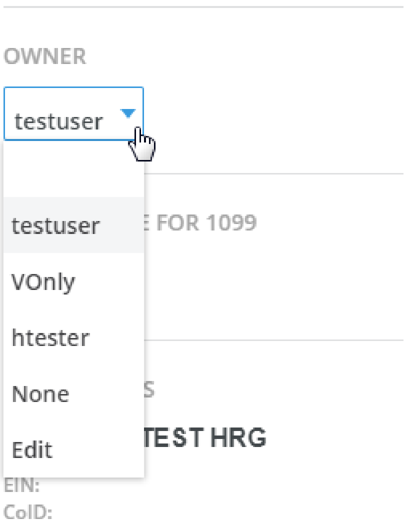


If you want to include an alert, select the "Yes" radio button and then indicate the "Alert Text" in the next column. This is the text that will appear in your Distribution Summary.

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.

Whomever you have set-up as the person responsible for the distribution or the "admin" for the plan, this individual will receive the notification specified under "TPA Email Template".





Whomever you have set up as the "Portal Editor" in the plan specifications will receive the notification indicated under "Sponsor Email Template".

Whatever was entered for the participant's email address will receive the notification indicated under "Participant Email Template"

TPA Email Template	Sponsor Email Template	Participant Email Template
Default Data-Based	Select a template	Select a template
Default Data-Based	Select a template	Select a template
Default Data-Based	Select a template	Select a template
Data Based Single Fiel	Select a template	Select a template