

# 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.

On/Off	Description
<input checked="" type="checkbox"/>	Needs Sponsor Verificati
<input checked="" type="checkbox"/>	Needs Participant Verific
<input checked="" type="checkbox"/>	Needs TPA Input
<input checked="" type="checkbox"/>	Needs Sponsor Input

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.

Fields	Modification	Changed To
Any Field ▼	Changed ▼	
Spousal Form Delivery ▼	Changed To ▼	Mail ▼
Status ▼	Changed To ▼	Needs TPA Verification ▼
Participant SSN ▼	Changed ▼	

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.

Include Alert    Alert Text

<input type="radio"/> Yes <input type="radio"/> No	
<input type="radio"/> Yes <input type="radio"/> No	
<input checked="" type="radio"/> Yes <input type="radio"/> No	TPA Verification
<input checked="" type="radio"/> Yes <input type="radio"/> No	Participant SSN

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.

Whoever 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”.

The screenshot shows a 'Plan Modules' table with columns for various plan components and their status. Below it is a 'Plan Checklist' section with expandable categories and a right-hand sidebar with action buttons.

Module	Plan Documents	IRS Forms	5500 Forms	1099 Forms	Compliance	Portal	Proposal	Distributions
Resp	Yes	Yes	Yes	Yes	Yes	Yes		Yes
Admin								

Plan Checklist - Expand All Applicable / Expand All / Collapse All    Print    Edit Check All    Non-Compliant    testuser    VOnly

- ▶ A. GENERAL INFORMATION    Edit Check Status
- ▶ B. ELIGIBILITY    Edit Check Status: ⚠

OWNER

A dropdown menu is open, showing a list of user names. A mouse cursor is pointing at the 'testuser' option.

- testuser
- testuser
- VOnly
- htester
- None
- Edit

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

A row in a table titled '11. Sponsor Editors'. It contains a user name 'Sample User' and a set of action buttons: 'Add Edit Delete Send Invite Email'.

11. Sponsor Editors	Sample User	Add Edit Delete Send Invite Email
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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 ⓘ

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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 Field ▼	Select a template ▼	Select a template ▼

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