

Defining Who Will Receive Confirmation Emails

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When you are setting up email setting for the various modules, you will be able to set up confirmation emails.

5500 Module*:

Confirmation Emails: If you would like to receive confirmation emails when the Form 5500/SF has been submitted, you would select “Yes” to be notified if the filing was Rejected, Not-Accepted, or Accepted. Note: The admin that has been assigned to the plan from the “Batch Workflow” => “Review/Assign Detail Status/Extensions” grid will receive the notification.

Name Change Emails: If you would like to receive notification emails if the signer clicks on “Change Name”, you will select “Yes”. Note: The admin that has been assigned to the plan from the “Batch Workflow” => “Review/Assign Detail Status/Extensions” grid will receive the notification, along with the original sender of the portal invite, if different.

Compliance Module*:

Confirmation Emails: If you would like to receive confirmation emails when the portal user has downloaded the Online Annual Questionnaire, Annual Questionnaire and/or Census Worksheet, you would select “Yes”. Note: The admin that has been assigned to the plan will receive the notification.

Document Module*:

Send Confirmation to Plan Admin: If you would like the admin assigned to the plan to receive confirmation emails when the portal user downloads a document, select “Yes”. Note: Enabling this feature will override the global confirmation email settings (see Note below).

Confirmation Name: If you have an administrator that you would like to receive confirmation emails, maybe in addition to the plan admin, when a portal user downloads a document, you would enter the administrator’s full name.

Editable: Allows you to override the default confirmation name when sending a document to the portal user.

Confirmation Email: If you have an administrator that you would like to receive confirmation emails, maybe in addition to the plan admin, when a portal user downloads a document, you would enter the administrator’s email address.

Editable: Allows you to override the default confirmation email when sending a document to the portal user.

Note: The Confirmation Email address is determined in the following order (whatever is found first in this order is what is used):

1. Confirmation email override on the document (Portal Pro and only applies to download document notifications).
2. Confirmation Email setting for the portal user.

3. Global Email Setting – Send Confirmation to Plan Admin

4. Global Email Setting – Confirmation Email

Please Note: We are currently exploring enhancements to the Document's module that would allow confirmation emails to be fully disabled; however, this functionality is not available today.

In the meantime, there are a few ways to manage the impact of these emails. We recommend using a dedicated email address in the global email settings and setting up an email rule to automatically route confirmation messages to a separate folder.

If there is ever uncertainty about who will receive a confirmation email, the [Confirmation E-mail Assistant](#) can be used to review the expected recipients.

Messaging Module:

Confirmation Name: If you have an administrator that you would like to receive confirmation emails when a portal user replies to a message, download a file from within a message, or sends a message, enter the administrator's full name.

Note: The admin that originally sent the message would also be included on the confirmation email.

Editable: Allows you to override the default confirmation name when sending a message to the portal user.

Confirmation Email: If you have an administrator that you would like to receive confirmation emails when a portal user replies to a message, download a file from within a message, or sends a message, enter the administrator's email address. **Note:** The admin that originally sent the message would also be included on the confirmation email.

Editable: Allows you to override the default confirmation email when sending a message to the portal user.

Administration Email: Enter an email address in this field to enable portal users to request a change to their demographic information. If enabled, the button will appear on the portal user's profile page in the portal. The email address specified will receive all requests. Request emails will contain information about the portal user's requested change, as well as a link to use to apply that change to the portal user's account.

Notifications:

E-Sign Completion Notification: Portal users that have been assigned to receive e-sign completion notifications will receive the notification after all signers have signed the document, if applicable.

Follow-up Email: Follow-up emails are sent to the TPA assigned to the plan for a specific module to let them know that a portal user has not completed a task that is on the portal user's ToDo list.

Reminder Email: Follow-up emails are sent to the TPA assigned to the plan for a specific module to let them know that a portal user has not completed a task that is on the portal user's ToDo list.

*See "How Do I Assign Admins to a Plan" below to learn how to assign admins to the Document, Administration and 5500 Modules, or to view who has already been assigned to plans.
