

Customize your Policy Expiry Notification Emails

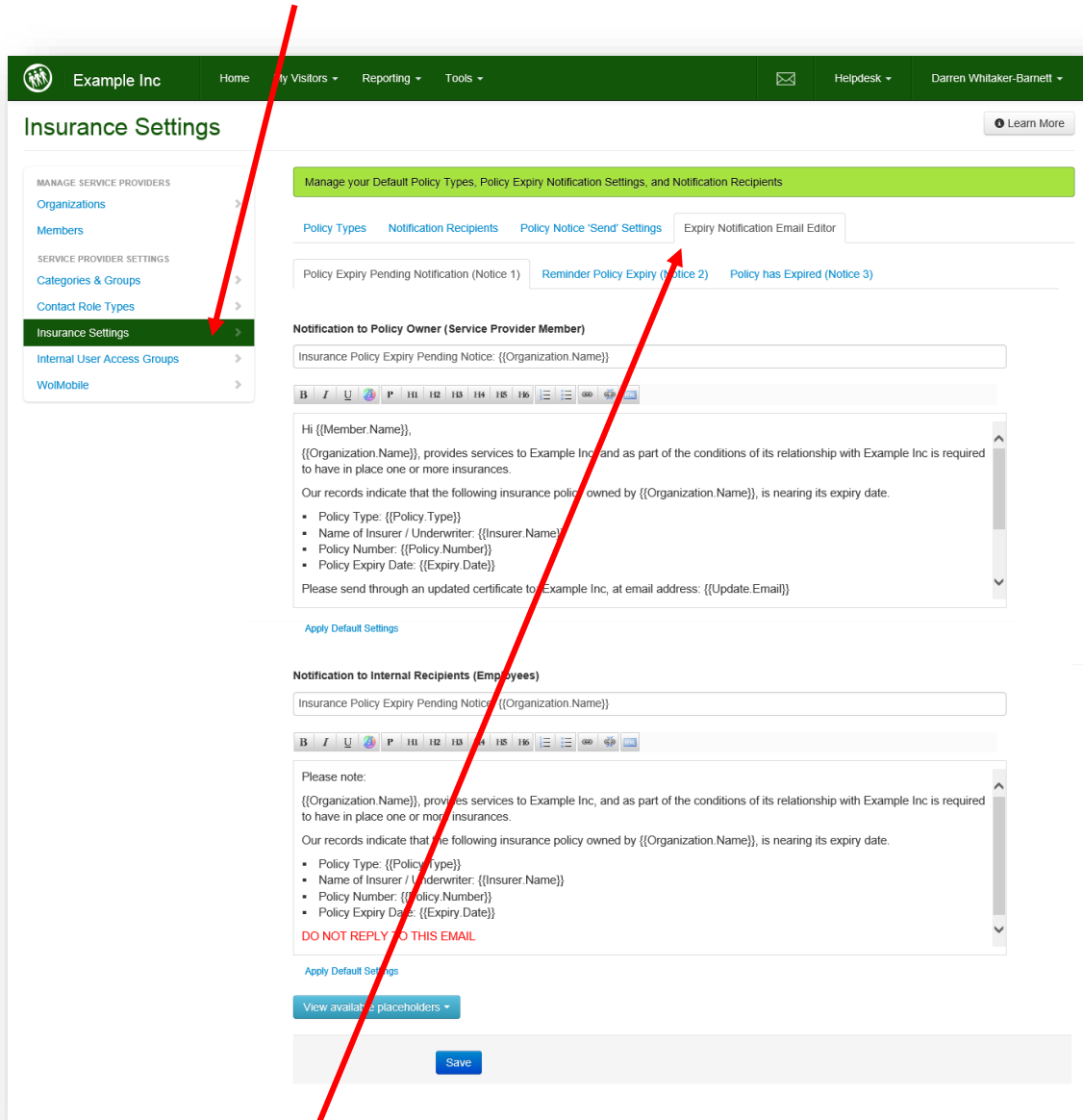
In this article we explain how to customize your Notification Emails. You must be a Service Provider Administrator to be able to access Insurance Settings to manage the email notification editor.

Table of Contents

- ACCESSING YOUR EMAIL EDITOR..... 2
- ABOUT THE EMAIL EDITOR 3
 - About the System Generated Email Templates..... 3
 - What are Placeholders?..... 3
 - Customizing the Email Templates 4
- WHAT ARE BUILT-IN EMAIL NOTIFICATIONS 5
 - Notice 1 Template..... 5
 - Notice 2 Template..... 6
 - Notice 3 Template..... 7

ACCESSING YOUR EMAIL EDITOR

1. Navigate to **Tools** > Service Provider Manager
2. Select **Insurance Settings** from the directory on the left side of screen.



3. Select the **Expiry Notification Email Editor** tab from the upper tab options.

ABOUT THE EMAIL EDITOR

Create your own personalized notifications for Notice 1, 2, and 3.

With each Notice (1, 2, and 3) there are two (2) types of emails sent out:

1. One to the **Policy Owner**
2. One to your nominated **Internal Recipients** (employee (s))

The language and message you wish to apply to the email sent to the policy owner would be different to that sent to the internal recipient. Your email notifications also need to include policy information about the policy that is expiring. For example:

1. Policy Type
2. Name of Insurer / Underwriter
3. Policy Number
4. Policy Expiry Date

In addition the email should include:

1. The **name of your organization** (so your Policy Owner has a reference point as to whom sent them the email and;
2. An **instruction** on where to send updated policy information back to (ideally an email address).

About the System Generated Email Templates

We recognise not every user understands how to use Placeholders to have their email automatically insert policy information and other dynamic data. So to make this as easy and as user-friendly as possible we have already created the emails for all three Notices (1, 2, and 3) for you. You just need to check what we have written, make any amendments where necessary and save.

What are Placeholders?

Placeholders allow your email to 'automatically' insert policy information or reply email addresses into the email being sent. For example: Let us say you want your email to include the words:

The following policy is expiring:

1. **Policy Type:** Public Liability
2. **Name of Insurer / Underwriter:** GIS Insurance
3. **Policy Number:** GISPL1234567
4. **Policy Expiry Date:** 31st December

To insert this information we must use Placeholders in our email template. Placeholders are accessible from the bottom of the screen within the button titled **View Available Placeholders**.

The current Placeholders are:

1. **Service Provider Organization Name:** Placeholder is: {{Organization.Name}}
2. **Insurance Update Email Address:** Placeholder is: {{Update.Email}}
3. **Member's Full Name:** Placeholder is: {{Member.Name}}
4. **Insurance Policy Type:** Placeholder is: {{Policy.Type}}
5. **Name of Insurer (Underwriter):** Placeholder is: {{Insurer.Name}}
6. **Policy Reference (Number):** Placeholder is: {{Policy.Number}}
7. **Policy Expiry Date:** Placeholder is: {{Expiry.Date}}
8. **Policy Start Date:** Placeholder is: {{Start.Date}}

Customizing the Email Templates

Review the email notifications for each of Notice 1, 2, and 3, make any required amendments and, if necessary, copy any required placeholder and paste into your email template. Confirm your selections and select **Save**.

WHAT ARE BUILT-IN EMAIL NOTIFICATIONS

Notice 1 Template

Notification to Policy Owner (Service Provider Member)

Subject: Insurance Policy Expiry Pending Notice: {{Organization.Name}}

Hi {{Member.Name}},

{{Organization.Name}}, provides services to Example Inc, and as part of the conditions of its relationship with Example Inc is required to have in place one or more insurances.

Our records indicate that the following insurance policy owned by {{Organization.Name}}, is nearing its expiry date.

- Policy Type: {{Policy.Type}}
- Name of Insurer / Underwriter: {{Insurer.Name}}
- Policy Number: {{Policy.Number}}
- Policy Expiry Date: {{Expiry.Date}}

Please send through an updated certificate to: Example Inc, at email address: {{Update.Email}}

If you have any questions about this notice please notify your contact person at Example Inc.

Should we not receive an updated Insurance Policy Certificate or Policy details we reserve the rights to prohibit your people from coming onto our operating sites.

DO NOT REPLY TO THIS EMAIL

Notification to Internal Recipients (Employees)

Subject: Insurance Policy Expiry Pending Notice: {{Organization.Name}}

Please note:

{{Organization.Name}}, provides services to Example Inc, and as part of the conditions of its relationship with Example Inc is required to have in place one or more insurances.

Our records indicate that the following insurance policy owned by {{Organization.Name}}, is nearing its expiry date.

- Policy Type: {{Policy.Type}}
- Name of Insurer / Underwriter: {{Insurer.Name}}
- Policy Number: {{Policy.Number}}
- Policy Expiry Date: {{Expiry.Date}}

DO NOT REPLY TO THIS EMAIL

Notice 2 Template

Notification to Policy Owner (Service Provider Member)

Subject: Insurance Policy Expiry Pending Notice: {{Organization.Name}}

Hi {{Member.Name}},

This is the second and final notification of this Policy's pending expiry.

{{Organization.Name}}, provides services to Example Inc, and as part of the conditions of its relationship with Example Inc is required to have in place one or more insurances.

Our records indicate that the following insurance policy owned by {{Organization.Name}}, is nearing its expiry date.

- Policy Type: {{Policy.Type}}
- Name of Insurer / Underwriter: {{Insurer.Name}}
- Policy Number: {{Policy.Number}}
- Policy Expiry Date: {{Expiry.Date}}

Please send through an updated certificate to: Example Inc, at email address: {{Update.Email}}

If you have any questions about this notice please notify your contact person at Example Inc.

Should we not receive an updated Insurance Policy Certificate or Policy details we reserve the rights to prohibit your people from coming onto our operating sites.

DO NOT REPLY TO THIS EMAIL

Notification to Internal Recipients (Employees)

Subject: Insurance Policy Expiry Pending Notice: {{Organization.Name}}

Please note:

This is the second and final notification of this Policy's pending expiry.

{{Organization.Name}}, provides services to Example Inc, and as part of the conditions of its relationship with Example Inc is required to have in place one or more insurances.

Our records indicate that the following insurance policy owned by {{Organization.Name}}, is nearing its expiry date.

- Policy Type: {{Policy.Type}}
- Name of Insurer / Underwriter: {{Insurer.Name}}
- Policy Number: {{Policy.Number}}
- Policy Expiry Date: {{Expiry.Date}}

DO NOT REPLY TO THIS EMAIL

Notice 3 Template

Notification to Policy Owner (Service Provider Member)

Subject: Insurance Policy has Expired: {{Organization.Name}}

Hi {{Member.Name}},

{{Organization.Name}}, provides services to Example Inc, and as part of the conditions of its relationship with Example Inc is required to have in place one or more insurances.

Our records indicate that the following insurance policy owned by {{Organization.Name}}, has expired.

- Policy Type: {{Policy.Type}}
- Name of Insurer / Underwriter: {{Insurer.Name}}
- Policy Number: {{Policy.Number}}
- Policy Expiry Date: {{Expiry.Date}}

Please send through an updated certificate to: Example Inc, at email address: {{Update.Email}}

If you have any questions about this notice please notify your contact person at Example Inc.

Should we not receive an updated Insurance Policy Certificate or Policy details we reserve the rights to prohibit your people from coming onto our operating sites.

DO NOT REPLY TO THIS EMAIL

Notification to Internal Recipients (Employees)

Subject: Insurance Policy has Expired: {{Organization.Name}}

Please note:

{{Organization.Name}}, provides services to Example Inc, and as part of the conditions of its relationship with Example Inc is required to have in place one or more insurances.

Our records indicate that the following insurance policy owned by {{Organization.Name}}, has expired.

- Policy Type: {{Policy.Type}}
- Name of Insurer / Underwriter: {{Insurer.Name}}
- Policy Number: {{Policy.Number}}
- Policy Expiry Date: {{Expiry.Date}}

DO NOT REPLY TO THIS EMAIL