

Remind Claimants to Submit Claim

Last Modified on 18/01/2023 3:19 pm GMT

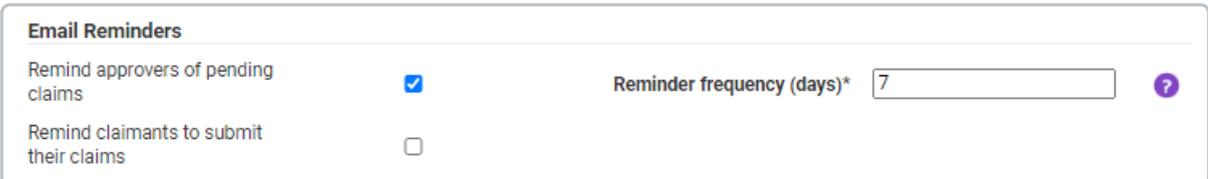
Permissions

You will require an Access Role with the following permissions:

- General Options

The process below explains how to set a reminder for claimants when they have outstanding claims which need submitting. When configured, the reminder emails are sent to claimants who have outstanding claims every X days (depending on the frequency entered). Follow the steps below to set this option:

1. Navigate from the **Home** page to **Administrative Settings | Tailoring | General Options**.
2. Scroll down to the **Email Reminders** section.
3. Tick the checkbox for **Remind claimants to submit their claims**. Activating this option will display the **Reminder Frequency** field, which is mandatory.



Email Reminders	
Remind approvers of pending claims	<input checked="" type="checkbox"/>
Remind claimants to submit their claims	<input type="checkbox"/>
Reminder frequency (days)*	<input type="text" value="7"/>

4. Enter the frequency which you would like the email reminders to be sent (between 1 and 99). Assure Expenses will send a reminder email to the claimant every **X days** if they have a claim which is not submitted. For example, if you configure this option on Monday and set the number as 7, the claimant will receive a reminder email every Monday until they have no outstanding current claims.
5. Click **Save** at the bottom of the page to activate this feature and store the settings.
 - Upon clicking save on this page, the claimants who have outstanding claims will receive their first email reminder. The following reminders will then be determined by the frequency which is set. If this option is already active and the frequency is changed, Assure Expenses will check the new frequency and automatically work out whether it needs to send out a new email reminder.
 - The email which is sent to claimants can be customised within **Administrative Settings | Tailoring | Notification Templates**. The notification template name is 'Sent to a claimant to remind them of unsubmitted claims'.

