Introduction

The **Mass Email Utility** screen is used when a client needs to send an email to a selected group or all employees.

Mass Email Utility

The **Mass Email Utility** screen contains two tabs: **Email** and **History**. The **Email** tab is where you create your mass email while the **History** tab records the **Batch #** for the email, the date sent, and the user who sent it.

Note: When creating a mass email, there are size limitations:

- The document upload cannot exceed 4000 KB.
- Server send limit is 4500 KB, which allows for an attachment and additional text (email size = header + text + attachment).
- Text must be included in the body of the email, or the email won't be sent. The text can either be from a selected email template or can be manually entered.

To access the **Mass Email Utility** screen and to create a mass email, follow these steps:

1. Navigate to **Client Management > Mass Email Utility**
2. Select the **Email Template**. Emails available in this dropdown menu are created on the **Client Management > Workflow Setup > Email Templates** screen.
   Note: If you do not select an email template from this dropdown, you must manually enter information for the email to send.
3. The **From** field cannot be overridden as this is the domain email address.
4. Enter a name in the **From Name** field if you wish to override the name used in the **From** field.
5. Enter a **Subject**. This is what populates in the subject line of the selected email template.
6. If needed, you can include an attachment in the **Attach File** field. Select the ellipsis icon and locate the file that you wish to attach. The document name displays.
7. Select the **Eligibility Rules** that you wish to include and use the double arrow icon to move the rule to the **Included Eligibility Rules** box. The **Eligibility Rules** box contains a list of all eligibility rules that have been set up for the client.
   Note: **Eligibility Rules** are set up on the **Client Management > Benefits > Eligibility Rules** screen.
8. If needed, select **Report** to view the "Eligible Employees" report. This report displays the name of the document attached to the email, the email text, a list of employees that will receive the email, and the **Eligibility Rule** that applies to each employee. This can be reviewed prior to sending the email. There is also a column for employees that are missing email addresses.
9. Click **Save Email**.