Sending email notifications for appointments to multiple email addresses for a client.
Oaktree *(v3.0)*

Objective: Need to have the ability to send an appointment reminder to multiple email addresses for an individual client.

Note: If you are sending the appointment notification to just the client at the email address that is already obtained for that client (in the 'Client Email' field), then you do not need to perform any of the following steps.

Step 1:

1) Once the client has been added, go to the Demographics tab.
2) Scroll down to the "Contact Information – Other" section in the Demographics.
3) Click "Yes" for the checkbox for the "Agree to receive email communications for appointments only"

Step 2:

1) Locate the "Notification Email (if different than Client Email)" field.
2) In this field enter ALL the email addresses that should receive the notification reminders for the client's appointment. Each email needs to be separated with a semicolon (;) and no spaces.

Example 1: You need to send an email notification for an appointment to a client's legal guardian, instead of the client.
Enter "Client Email" field: clientemail@example.com
Enter "Notification Email" field: clientguardianemail@example.com
In this example the appointment notification will only go to clientguardianemail@example.com

Example 2: You need to send an email notification to both the client and the client's guardian.
Enter "Client Email" field: clientemail@example.com
Enter "Notification Email" field: clientemail@example.com;clientguardianemail@example.com
In this example the appointment notification will go to both clientemail@example.com and clientguardianemail@example.com

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Example 3: You need to send an email notification to the client, the client's guardian, and another representative for the client.

Enter "Client Email" field: clientemail@example.com

Enter "Notification Email" field: clientemail@example.com;clientguardianemail@example.com; clientrepresentativeemail@example.com

In this example the appointment notification will go to all three email addresses: clientemail@example.com and clientguardianemail@example.com and clientrepresentativeemail@example.com

Client Email	Notifications Email (if different than Client Email)
clientemail@example.com	clientemail@example.com;clientguardianemail@example.com;clientre

Step 3:

1) The client must have an appointment reminder setting entered. This can be from either the global reminder settings for all clients or as an individual client reminder setting.
2) If setting up a reminder setting for an individual client, select the client.
3) Click on "Client Information" under the Client Chart.
4) Click the "Edit Notification Settings" button.
5) Enter the desired frequency, duration and (optional) email message. You can enter one or multiple reminder entries.

Add/Edit Custom Notification Setting for Client ✕

Custom Appointment Notifications
for: 👤 Banana, Hannah

Frequency			Method	Additional Message (Optional)
-	15	+ minutes ▾ before	Email	See you in 15 minutes!
-	1	+ hours ▾ before	Email	See you in 1 hour!
-	1	+ days ▾ before	Email	See you tomorrow!

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Summary:

In order for multiple email address to be able to receive email notifications with the link for video appointments:

1. In the client's Demographics (Contact Information – Other) - Need to have the "Agree to receive email communications for appointments only" checked = Yes
2. In the client's Demographics (Contact Information – Other) – the Multiple emails address need to be entered in the "Notification email" field. They need to be separated by semicolon (;) and no spaces.
3. A Notification setting for the appointments needs to be created. Can be a global system notification setting or an individual client system setting.

Considerations:

- When sending an email for an appointment "on the fly" or after the appointment has already been started. There still needs to be a way to invite an email address that is not setup in the Notifications list.
- These settings are going to be applied to all appointments, when there might need to be a way to pick and choose which appointments should be sent to multiple emails for a client.
- The email template will be the same for all emails that are sent to the clients.