TSI Link™ for Respiratory Protection
Automated Emails Guide

(Application Note)

Contents

Details on How They Work

This guide explains how **TSI Link**™ for Respiratory Protection automated email notifications are generated, scheduled, and delivered—helping administrators ensure workers stay informed and compliant at every step. You'll find details on email types, timing, notification logic, and configuration options, as well as testing procedures, self-scheduling links, and FAQs. Together, these automated tools enhance efficiency, reduce manual follow-up, and support a safer, more organized respiratory protection process.

What is Sent When

Email Type	Fit Test	Medical Clearance	Respirator Training
Confirmation Appointment Scheduled	Upon event	Upon event	Upon event
Reminder: Upcoming Appointment	7 and 1 days before	7 and 1 days before	7 and 1 days before
Update to Appointment	Upon event	Upon event	Upon event
Notice: Due Soon	30 days before	30 days before	30 days before
Notice: Canceled	Upon event	Upon event	Upon event
Retesting Required	Upon event	Upon event	Upon event
Action Required: Overdue	1 and 7 days after	1 and 7 days after	1 and 7 days after
Congratulations: Passed	Upon event		

Process for Sending out Emails

Upon Event Emails

Are sent directly after an event, for example:

Confirmation Appointment Scheduled emails are sent when an appointment is booked

Update to Appointment emails are sent when an appointment is changed

Notice: Canceled emails are sent when an appointment is cancelled

Retesting Required emails are sent after a failed test is saved

Action Required: Overdue emails are sent a year after the last Fit Test. Or, if Training updates or Medical Clearance updates are required, it is sent when they expire

Congratulations: Passed emails are sent after a passed fit test

Scheduled Email Notification Logic

Reminder, Due Soon or Overdue emails are sent when the event passes. Examples:

Due Soon Notices: TSI Link™ Software will compare the current date to the Next Test Date, if the difference is 30 days and email will be sent. For example, if a customer last fit test was January 31, 2025, then they will be a Due Soon Email for Fit Testing on January 1.

Reminder Emails: TSI Link™ Software will compare the current date to the Scheduled Test Date, if the difference is 7 or 1 days and email will be sent. For example, if a customer has a fit test scheduled for was January 30, 2026, then they will be a Due Soon Email for Fit Testing will be sent on the morning of January 23 and January 29.

Overdue Notices: TSI Link™ Software will compare the Next Test Data to the current date and if today is one or 7 days past the Next Test Date, an email will be sent. For example, if a customer's Next Test Date was January 31, 2026, then they will get Overdue Notices sent on Feb 1 and Feb 7. Supervisors are copied on Overdue Notices.

Email notifications are not sent if:

1. The user's email is null or invalid.
2. The user belongs to a data set that is not enabled.
3. The notification if the program category is not enabled. (See Settings | Account section)
4. Users is inactive,
5. Users does not require a respirator.
6. User doesn't have an appointment scheduled.
7. The email template is disabled.

8. **The notification time passed. For example,**

    - **Scenario A:** "Reminder: Upcoming Appointment" notification is sent 24 hours in advance. So, the appointment is set up 23 hours before the appointment time.

      Result: the notification will not be sent. You will not receive reminder emails for appointments scheduled less than 24 hours in advance.

    - **Scenario B:** When loading new people in, if there is a person whose fit test is due in 29 days.

      Result: The "*Notice: Your Respirator Fit Test is Due Soon*" email that goes out 30 days would not be sent to this customer, since the 30 day point already passed.

    - **Scenario C**: If a person's records is updated where the system had them as being due for training in 12 days, but an admin edited their record, and so it is now due in 6 days.

      Result: The notification will not be sent an email for "Reminder: Upcoming Respirator Training Appointment" since this email usually goes out 7 days before.

Timing of the Emails

Emails will be sent hourly based on time zone, checking every hour for which ones need reminders.

N O T E
If the system is down or has failed to send reminder emails for any reason it will attempt again in an hour. If successful it will update the person's email record with the time the email was sent. This is only stored in the database and not available yet to the customer in the UI.

This ensures that these emails are sent once and only once within the proper time window, while still being able to recover from catastrophic failures or downtime.

Testing and Setting up the Email Notification System

These emails can be configured and adjusted to meet your needs. To test and verify the system, TSI recommends:

1. **Load or enter Data into a Sand Box or Demo Data Set**.

    - There is demo data posted on Import Template and Data Guide page:
      TSI - **TSI Link** for Respiratory Protection - Import Templates

    - **For testing, use emails that you can retrieve the emails from.**

2. Customize the **emails that are sent upon events**: Confirmation Appointment Scheduled, Update to Appointment, Notice: Canceled, Retesting Required, Congratulations: Passed

3. Verify these emails are being sent as desired.

    - For example, to test Respirator Training Appointment notifications:
      - Create/Edit a Respirator Training Appointment to be in 25 hours
      - Create/Edit a Respirator Training Appointment to be in 7 days
      - Wait 24 hours, until the next day
      - Check the Mail box for the user being tested, you should see two emails
        - One mail is for tomorrow's appointment

One mail is for 7 days appointment.

Links for Self-Scheduling Appointments

Almost all of the emails have a Self Schedule Link. The system is set up so these scheduling links are unique per for the person being tested. So, for example, a link from an email for John.Doe@company.com will enable him to schedule an appointment, and if it is sent to someone else, it would not enable them to book an appointment. This is to enable a more customized, streamlined experience.

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Example Email

Overdue email was sent on the day after it expired, first thing in the morning per the customer's time.
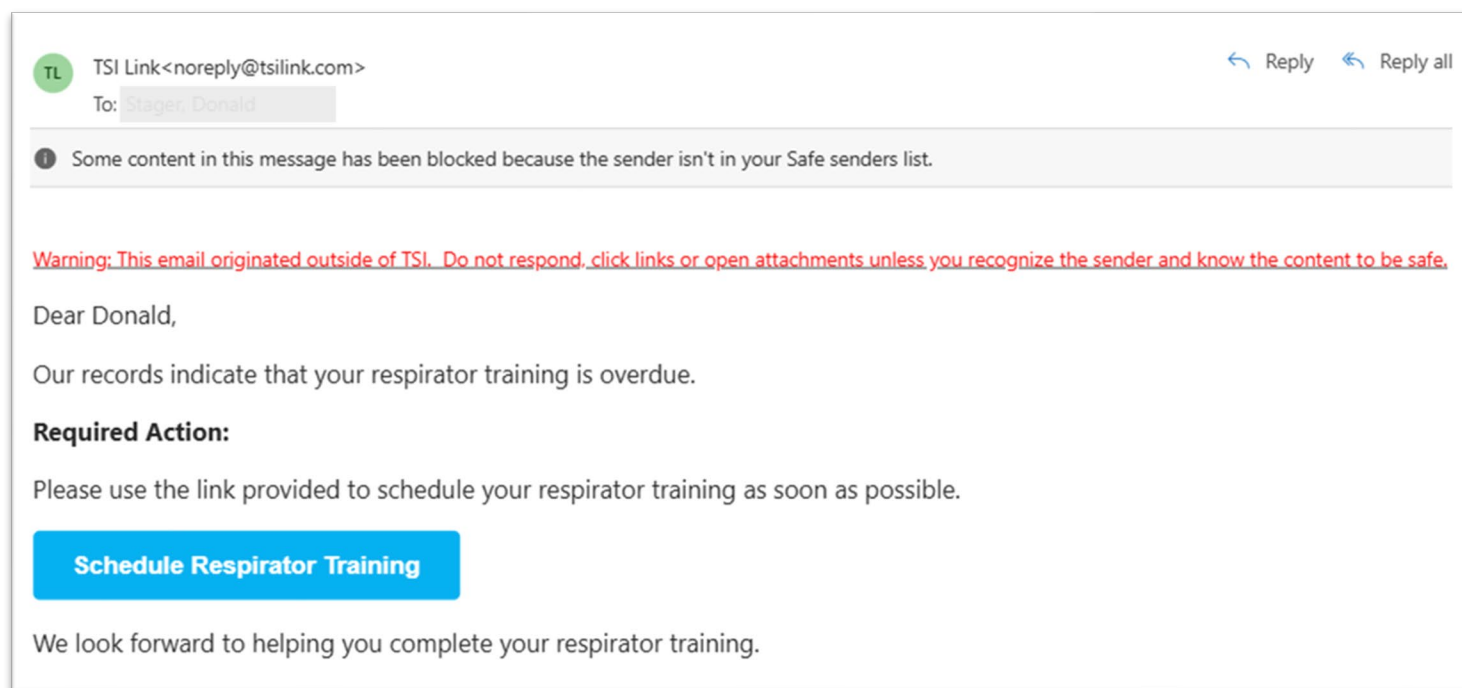
FAQs

- **Can I customize emails?**
  Yes, you can change the wording the font, add pictures, etc.
- **Can I customized or change when the emails are sent? For example, sending due soon emails 60 or 14 or 60 and 14 days before they are due for testing?**
  No, this type of customization is not available
- **Can I cc or bcc people on emails?**
  Supervisors are copied on overdue emails, but adding or copying other people is not currently available.
- **Is there a report confirming what emails were sent when, what emails were read and which bounced?**
  Not at this time.

For any of these functions, if you have suggestions on how the system should be enhanced, contact your TSI® Representative or email Cloudsupport@tsi.com.

Appendix A – List of Emails That Are Sent Out

Category	Type	Subject
Fit Test	Scheduled	Confirmation: Respirator Fit Test Appointment has been Scheduled
Fit Test	Reminder	Reminder: Upcoming Respirator Fit Test Appointment
Fit Test	Passed	Congratulations: You Passed Your Respirator Fit Test
Fit Test	Overdue	Action Required: Your Respirator Fit Test is Overdue
Fit Test	Modified	Update to Your Respirator Fit Test Appointment
Fit Test	Failed	Important: Respirator Fit Test Results – Retesting Required
Fit Test	Due Soon	Notice: Your Respirator Fit Test is Due Soon
Fit Test	Cancelled	Notice: Your Respirator Fit Test Appointment has been Canceled
Medical Clearance	Scheduled	Confirmation: Medical Clearance Appointment has been Scheduled
Medical Clearance	Reminder	Reminder: Upcoming Medical Clearance Appointment
Medical Clearance	Overdue	Action Required: Your Medical Clearance is Overdue
Medical Clearance	Modified	Update to Your Medical Clearance Appointment
Medical Clearance	Due Soon	Notice: Your Medical Clearance is Due Soon
Medical Clearance	Cancelled	Notice: Your Medical Clearance Appointment has been Canceled
Respirator Training	Scheduled	Confirmation: Respirator Training has been Scheduled
Respirator Training	Reminder	Reminder: Upcoming Respirator Training Appointment
Respirator Training	Overdue	Action Required: Your Respirator Training is Overdue
Respirator Training	Modified	Update to Your Respirator Training Appointment
Respirator Training	Due Soon	Notice: Your Respirator Training is Due Soon
Respirator Training	Cancelled	Notice: Respirator Training Appointment has been Canceled