

Note: Please note that at this time, the practice may choose to use one delivery method for all "reminder Events" or create multiple Events with different delivery methods. OP Notify does not currently recognize the Preferred Contact Method stored in OP. The instructions below explain how to set up the available delivery methods.

Create an Appointment Event

1. Access OP Notify.
2. On the Navigation Panel, click the arrow to expand the **PatientNOTIFY** group.
3. Select **Events**.
4. Click the drop-down arrow on the **New** button and select **Appointment Reminder**.
5. Enter an **Event Name**.
6. (Optional) Enter the description of the Event in the **Description** field.
7. Specify the **Event Population**:
 - a. Select the practice(s)/location(s) from the **Event Population** dropdown list. To include all practice(s)/location(s) click [\(Select All\)](#).
 - b. If excluding visit types, click **Expand All** and deselect the visit types that should be excluded.

Note: If you chose a location in the Event Population drop-down, you must expand the list and manually select the practice and appointment reasons.
8. Specify the providers to be included in the event from the **Include Providers** section.

Note: All providers are selected by default.

 - a. If excluding providers, click the expand + button and deselect the providers that should be excluded.
9. Enter the **Event Duration** start and end dates. If the event will be continuous, leave the end date blank
10. Specify the **Reminders and Notifications**:

Note: You must create two events if the practice wishes to send reminders days in advance as well as hours in advance of an appointment. Only one selection is permitted in the Reminders and Notifications field.

 - a. Enter the number of days, prior to an appointment, in the **Send a reminder** field.

Or

 - b. Enter the number of hours, prior to an appointment, in the **Send a same day reminder** field.
11. Specify reminder delivery days and notification caps:
 - a. Click the expand + button for **Advanced Settings**.
 - b. Set **Event Delivery Days** by selecting the checkbox for the days of the week the appointment reminder is sent.
 - c. Review the **Notifications Cap** settings. To ignore the cap, select the **Ignore Notification Cap** checkbox.
12. Click the **Next** button.

Create an Event: Call Delivery Rule

1. Verify **Active** is set to **OFF**. A Best Practice is to change it to **ON** when ready to implement the Event.
2. Click the drop-down arrow for **Method** and select **Call**.

Note: Mail is not available as a method of delivery with OP Notify.
3. Set the **Schedule Delivery Time** by clicking the **clock** icons.
4. Review the **Time Zone**. To make a change, click the dropdown arrow and select from the list.

5. Click **Next** to proceed to the Call information

Create a Voice and Recording Message

1. Enter the **Caller ID Number**. (*Required field*)
2. Enter the **Max Retries** by clicking the drop-down and selecting from the list.
3. Enter the minutes between retry in the **Period Between Retries** field.
4. Type the message for the Appointment Reminder in the **Voice Message** field:
 - a. Click the **Insert Token** button to add fields to personalize the message.
 - i. (*Optional*) Click the **Play message** button to listen to the voice message.
 - b. Confirm the **Include touch tone options** checkbox is not selected.
Note: At this time, not all touch tone options are available. Include the following in your voice message field, "Press 1 to confirm the appointment or press 7 to replay the message."
5. Type the message for the appointment reminder in the **Recording Message** field. You may copy the voice message and paste it into the recording message field and modify it, but be certain to remove the touch-tone options if you used them in the Voice Message field.
 - a. Click the **Insert Token** button to add fields to personalize the message.
 - i. (*Optional*) Click the **Play message** button to listen to the recording message.
6. (*Optional*) Enable voice message and recording in Spanish.
 - a. Click the **Spanish** tab and toggle **Active** to On.
 - b. Enter the Spanish translation in the Voice and Recording message fields.
7. (*Optional*) **Send Test Call:**
 - a. Enter the **Caller ID**.
 - b. Enter your cell phone number, or a staff phone number, in the **Enter Phone Number** field.
 - c. Click the **Test** button.
Note: The test voice message will be sent from the tab selected, for example, if on the Spanish tab the message will be sent using the Spanish message.
8. Click the **Save** button.

Create an Appointment Event: Text Delivery Rule

1. Verify **Active** is set to **OFF**. A Best Practice is to change it to **ON** when ready to implement the Event.
2. Click the drop-down arrow for **Method** and select **Text**.
Note: Mail is not available as a method of delivery with OP Notify.
3. Set the **Schedule Delivery Time** by clicking the **clock** icons.
4. Review the **Time Zone**. To make a change, click the dropdown arrow and select from the list.
5. Click **Next** to proceed to the Text information

Create a Text Message

1. Type the message for the Appointment Reminder in the **Text** field:
 - a. Click the **Insert Token** button to add fields to personalize the message.
Note: **Yes** or **Y** must be typed as a response to confirm an appointment. Instructions should be included in the text message field, "Reply YES or Y to confirm the appointment."
2. (*Optional*) Click the **Add Opt Out Disclaimer** button.

3. Create a Consolidated Message.

Note: Consolidated Messages are optional and can be enabled to limit the amount of messages a parent receives. When enabled, Consolidated Messages are applied when multiple children who share the same Primary Contact (with the same phone number), Language, and Preferred Method of Contact have scheduled appointments for the same day, at the same location.

4. Click the **Send Consolidated Messages** checkbox.

5. Type the message for the Appointment Reminder in the **Text** field:

- a. Click the **Insert Token** button to add fields to personalize the message.

Note: **Yes** or **Y** must be typed as a response to confirm an appointment. Instructions should be included in the text message field, "Reply YES or Y to confirm the appointment."

6. (Optional) Click the **Add Opt Out Disclaimer** button.

7. (Optional) Enable an individual and consolidated text message in Spanish.

- a. Click the **Spanish** tab and toggle **Active** to On.
- b. Enter the Spanish translation in the Individual Message and Consolidated Message fields.

8. (Optional) **Send Test Text:**

- a. Enter your cell phone number, or a staff phone number, in the **Enter Phone Number** field.
- b. Click the **Test Individual Text** or **Test Consolidated Text** button.

Note: The test text message will be sent from the tab selected, for example, if on the Spanish tab the text message will be sent using the Spanish message.

9. Click the **Save** button.

Create an Appointment Event: Email Delivery Rule

1. Verify **Active** is set to **OFF**. A Best Practice is to change it to **ON** when ready to implement the Event.
2. Click the drop-down arrow for **Method** and select **Email**.
Note: Mail is not available as a method of delivery with OP Notify.
3. Set the **Schedule Delivery Time** by clicking the **clock** icons.
4. Review the **Time Zone**. To make a change, click the dropdown arrow and select from the list.
5. Click **Next** to proceed to the Email information.

Create an Email Message

1. Enter a subject for the email in the **Email Subject** field.
2. Create the email message:
 - a. **Create plain text email** is selected by default. Type the message for the appointment reminder in the **Email Message** field.
 - i. Click the **Insert Token** button to add fields to personalize the message. You may use the **Confirm Appointment Link** token but **do not** use the **Cancel Appointment Link** at this time.
 - b. Select the **Use email templates** radio button if the practice has previously saved a template to use for the reminder.
3. (Optional) Click the **Include patient opt-out link** checkbox.
4. (Optional) Enable text message in Spanish.
 - a. Click the **Spanish** tab and toggle **Active** to On.

- b. Enter the Spanish translation in the Email Subject and Email message field.

Note: Create plain text email is selected by default, to use an email template click the Use email template radio button.

5. (Optional) **Send Test Email:**

- a. Enter your email address in the **Enter Email Address** field.

- b. Click the **Send** button.

Note: The test email message will be sent from the tab selected, for example, if on the Spanish tab the email message will be sent using the Spanish text.

6. (Optional) Click the **Preview** button to view the email message.

7. Click the **Save** button.