OP Notify: Create Billing Reminder Events

Note: This is an additional feature for Bill Pay where parents can be notified whenever there is an updated patient balance posted to their InteliChart Patient Portal. This feature is only available if the practice is using OP Notify along with the InteliChart Patient Portal and Instamed Merchant Services.

Create a Billing Reminder 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 **Billing Reminder**.
5. Enter an **Event Name**.
6. *(Optional)* Enter the description of the Event in the **Description** field.
7. Enter the **Event Duration** start and end dates. If the event will be continuous, leave the end date blank.
8. Specify the **Billing Reminders**.
   Note: Different events must be created if the practice wants to send reminders for:
      - New balances
      - Outstanding balances
      - Different delivery rules
   a. **New Balance**: Select the radio button to send billing reminders for new patient balances.
      Or
   b. **Outstanding Balance**: Select the radio button to send billing reminders for an outstanding patient balance.
      i. Click the drop-down arrow and select a day to send balance reminders, the default selection is Last.
9. *(Optional)* Specify reminder delivery days and notification caps:
   a. Click the expand **+** button for **Advanced Settings**.
   b. Review the **Notifications Cap** settings. To ignore the cap, select the **Ignore Notification Cap** checkbox.
10. Click the **Next** button. In the next window, you will select the Delivery Method for the reminder. Proceed to the section below for your intended delivery method.
    Note: Mail is not available as a method of delivery with OP Notify.

Create a Billing Reminder Event: Call Delivery Rule

1. Verify **Active** is set to **OFF**. Best Practice is to change it to **ON** when the practice is 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 drop-down 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. Select the **Max Retries** by clicking the drop-down and selecting from the list.

3. Select the minutes between retries from the **Period Between Retries** drop-down list.
4. Type the message for the billing 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.
5. Type the message for the billing reminder in the **Recording Message** field. You may copy the voice message and paste it into the recording 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. Make changes, if needed, and click the **Save** button to save your message.

Create a Billing Reminder Event: Text Delivery Rule

1. Verify **Active** is set to **OFF**. 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 drop-down 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 billing reminder in the **Text** field:
   a. Click the **Insert Token** button to add fields to personalize the message.
2. *(Optional)* Click the **Add Opt Out Disclaimer** button.
3. *(Optional)* Enable a text message in Spanish.
   a. Click the **Spanish** tab and toggle **Active** to On.
   b. Enter the Spanish translation in the Individual Message field.
4. *(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** 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.
5. Make changes, if needed, and click the **Save** button to save your message.

Create Billing Reminder Event: Email Delivery Rule

1. Verify **Active** is set to **OFF**. 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 drop-down 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 billing reminder in the **Email Message** field.
      i. Click the **Insert Token** button to add fields to personalize the message.
   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 email 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. Make changes, if needed, and click the **Save** button to save your message.