

Table of Contents - Jump to a section below

[Create an On Demand Notification Event](#)

[Set Delivery Rule and Details: Call](#)

[Set Delivery Rule and Details: Text](#)

[Set Delivery Rule and Details: Email](#)

[Set Delivery Rule and Details: Call or Text](#)

On Demand Notifications are intended to send messages to patients/parents on an as-needed basis (for example, to communicate an office closure, etc.) and are not typically used for Appointment Reminders.

Create an On Demand Notification Event

1. Log in to the Practice Portal with your login/password.
2. In the Navigation Panel, click the **Patient Notify** arrow and select **Events**.
3. Click the **New** drop-down and select **On Demand Notification**.
4. Enter an **Event Name**.
5. *(Optional)* In the **Description** field, enter a description of the Event.
6. Specify the **Event Population**:
 - a. Click the **Event Population** drop-down arrow and select the Practice(s)/Location(s). To include all, click Select All.
 - b. To exclude Visit Types/Appointment Reasons, click **Expand All** and deselect those 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 Visit Types/Appointment Reasons.
7. In the **Include Providers** section, specify the Providers to be included in the Event. By default, all Providers are selected. To exclude Providers, click + and deselect the Providers that should be excluded.
8. Enter the **Appointment Notification Range**:
 - a. Click the **calendar** buttons in the start and end date fields to select the dates of appointments to include. **Note:** The start date can begin at the current date and end date up to one year in the future.
 - b. Click the **clock** buttons in the start and end time fields for the times of appointments to include.
9. *(Optional)* Click the **Calculate** button to view the number of notifications that will be sent.
10. Click + to expand the **Advanced Settings** and review the **Notifications Cap** settings. To ignore the cap, select the **Ignore Notification Cap** checkbox.
11. Click the **Next** button to proceed with setting the Delivery Rule and entering the details for the On Demand Notification Event: [Call](#), [Text](#), [Email](#), or [Call or Text](#). See these respective sections below. **Note:** Mail is **not** available as a delivery method with OP Notify.

[Back to top](#)

Set Delivery Rule and Details: Call

The steps below should be taken after creating the On Demand Notification Event details following the steps in the [Create an On Demand Notification Event](#) section above if your Event will utilize the **Call** Method. There are two types of Call Messages that you'll be setting up, Voice and Recording-- **do not copy and paste the content of the Voice Message to the Recording Message (and vice versa).**

1. Verify **Active** is set to **ON**.
2. Click the **Method** drop-down and select **Call**.
3. Click **Next** to proceed to the Call information.

Create the Voice and Recording Messages

1. *(Required)* Enter the **Caller ID Number**.
2. Click the **Max Retries** drop-down and select the number of retries from the list.
3. Click the **Period Between Retries** drop-down and select the number of minutes between retries from the list.
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.
5. Type the message for the appointment reminder in the **Recording Message** field. **Do not copy and paste from the Voice Message field.** Be certain not to include the touch-tone options since this is a recorded message.
 - 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 Message in Spanish.
 - a. Click the **Spanish** tab and toggle **Active** to On.
 - b. Enter the Spanish translation in the Voice Message and Recording Message fields.
7. *(Optional)* Send a **Test Call** from the English or Spanish tab (or both separately):
 - a. In the **Caller ID** field, enter the **Caller ID**.
 - b. In the Enter Phone Number field, enter your cell phone number or a staff phone number to receive the call.
 - c. Click the **Test** button. To hear the Voice message, answer the call. To hear the Recording Message, let the call go to voicemail.
8. Make changes to the Voice or Recording Messages, if needed.
9. Click the **Send** button.

[Back to top](#)

Set Delivery Rule and Details: Text

The steps below should be taken after creating the On Demand Notification Event details following the steps in the [Create an On Demand Notification Event](#) section above if your Event will utilize the **Text** Method.

OP Notify: On Demand Notification QRG

1. Verify **Active** is set to **ON**.
2. Click the **Method** drop-down and select **Call**.
3. Click **Next** to proceed to the Text information.

Create the Text Message

1. Type the message for the On Demand Notification in the **Text** field:
 - a. Click the **Insert Token** button to add fields to personalize the message. Be sure to include information in the message that will instruct the parent/patient on the next steps that should be taken, if applicable.
2. *(Optional)* Click the **Add Opt Out Disclaimer** button. Acceptable response for a parent/patient to opt-out are “Stop” and “Detener”.
3. *(Optional)* Enable Text Message in Spanish.
 - a. Click the **Spanish** tab and toggle **Active** to On.
 - b. Enter the Spanish translation in the Text field.
4. *(Optional)* Send a **Test Text** from the English or Spanish tab (or both separately):
 - a. In the **Enter Phone Number field**, enter your cell phone number or a staff phone number to receive the text.
 - b. Click the **Text** button.
5. Make changes to the Text, if needed.
6. Click the **Send** button.

[Back to top](#)

Set Delivery Rule and Details: Email

The steps below should be taken after creating the On Demand Notification Event details following the steps in the [Create an On Demand Notification Event](#) section above if your Event will utilize the **Email** Method.

1. Verify **Active** is set to **ON**.
2. Click the **Method** drop-down and select **Email**.
3. Click **Next** to proceed to the Email information.

Create the Email Message

1. In the **Email Subject** field, enter a subject for the email.
2. Select how you want to begin creating the email message:
 - **Create plain text email** (default): In the **Email Message** field, type the message for the email.
 - a. Click the **Insert Token** button to add fields to personalize the message.
 - **Use email template**: Click the drop-down to select a previously saved template to use for the email.
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 fields.
5. *(Optional)* Send a **Test Email** from the English or Spanish tab (or both separately):

- a. In the **Enter Email Address** field, enter your email address.
- b. Click the **Send** button.
6. *(Optional)* Click the **Preview** button to view the email message.
7. Make changes to the Email, if needed.
8. Click the **Send** button.

[Back to top](#)

Set Delivery Rule and Details: Call or Text

The steps below should be taken after creating the On Demand Notification Event details following the steps in the [Create an On Demand Notification Event](#) section above if your Event will utilize the **Call or Text** Method.

1. Verify **Active** is set to **ON**.
2. Click the **Method** drop-down and select **Call or Text**.
3. *(Required)* Use the **Priority 1** and **Priority 2** drop-downs to select the priority of the reminder.
Note: When sending an On Demand Notification for Call or Text, OP Notify will first check if the patient has the contact method set as Priority 1. If yes, the notification will be sent using that contact method. If the patient does not have the contact method for Priority 1 then Priority 2 will be used to send the notification.
4. *(Optional)* Click the **Use Patient Preferred Method** checkbox as the priority for the contact method. This checkbox is used when a Practice also has the Patient Portal.
5. Click **Next** to proceed to the Call information.

Create the Voice and Recording Message

1. *(Required)* Enter the **Caller ID Number**.
2. Click the **Max Retries** drop-down and select the number of retries from the list.
3. Click the **Period Between Retries** drop-down and select a number from the list or type a number in the field.
4. Type the message for the On Demand Notification 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.
5. Type the message for the On Demand Notification in the **Recording Message** field. **Do not copy and paste from the Voice Message field.** Be certain not to include the touch-tone options since this is a recorded message.
 - 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 a **Test Call** from the English or Spanish tab (or both separately):
 - a. In the **Caller ID** field, enter the **Caller ID**.
 - b. In the Enter Phone Number field, enter your cell phone number or a staff phone number to receive the call.

OP Notify: On Demand Notification QRG

- c. Click the **Test** button. To hear the Voice message, answer the call. To hear the Recording Message, let the call go to voicemail.
8. Make changes to the Voice or Recording Messages, if needed.
9. Click the **Next** button.

Create the Text Message

1. In the Text field, type the message for the On Demand Notification.
 - a. Click the **Insert Token** button to add fields to personalize the message. Include information in the message that will instruct the parent/patient on the next steps that should be taken.
2. *(Optional)* Click the **Add Opt Out Disclaimer** button. Acceptable response for a parent/patient to opt-out are “Stop” and “Detener”.
3. *(Optional)* Enable Text Message in Spanish.
 - a. Click the **Spanish** tab and toggle **Active** to On.
 - b. Enter the Spanish translation in the Text message field.
4. *(Optional)* Send a **Test Text** from the English or Spanish tab (or both separately):
 - a. In the **Enter Phone Number field**, enter your cell phone number or a staff phone number to receive the text.
 - b. Click the **Text** button.
5. Make changes to the Text, if needed.
6. Click the **Send** button.

[Back to top](#)