

OP Notify: Appointment Reminder Events

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Version 20.8

■ This content is part of the **OP Notify Training Program**.

About

Appointment Reminder Events are used to send Reminder Messages to patients for their upcoming scheduled appointments. To create Events in OP Notify, you must have the **Build Events** permission.

Create an Appointment Reminder 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 **Appointment Reminder**.
4. Enter an **Event Name**. It is Best Practice to include the Delivery Method at the beginning of the Event Name. For example, "Text: Appointment Reminders All Patients".
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.



Tip: 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 **Event Duration** in the Start and End Date fields. If the End Date is blank, the event will be continuous.
9. Select a radio button in the **Upcoming Appointment Reminders** section. You can only choose one radio button option. If your Practice wants to send Reminders both days and hours prior to an appointment for the same delivery method, you must create multiple Events.
 - To set the number of **days** prior to an appointment, enter a numeric value in the **Send a reminder __ days prior to appointment** field.
 - To set the number of **hours** prior to an appointment, enter a numeric value in the **Send a same day reminder __ hours prior to appointment** field.



Important: If an appointment is canceled or rescheduled, a parent/patient may receive an Appointment Reminder for the appointment. OP Notify reminders are queued dependent upon the number of days prior to an appointment. If the appointment was queued prior to being canceled or rescheduled the parent will receive the original appointment reminder.

10. Click the **+** to expand and complete the following **Advanced Settings**:
 - a. Select the **Event Delivery Days**: It is Best Practice to select all Event Delivery Days that way no appointments are missed. To exclude a day, deselect the checkbox.
 - b. *(Optional)* Confirm the **Notification Cap** settings. Select the **Ignore Notification Cap** checkbox if the Event will not follow the Cap rules.
 - c. *(Optional)* Select the **Notify on earliest appointment only** checkbox to send a Reminder for the first occurrence of an

appointment that occurs on the same day for a patient. Enabling Consolidated messages takes priority over this setting.

- d. Click the **Next** button to proceed with setting the Delivery Method and entering the details for the Appointment Reminder Event. See the following articles to learn how to finish creating the Reminder Messages by the Delivery Method.

- [Email Reminder Event](#)
- [Call Reminder Event](#)
- [Text Reminder Event](#)
- [Call or Text Reminder Event](#)

Version 14.10



WARNING: This information is intended only for clients currently in the implementation or production phase with OP Notify functionality.

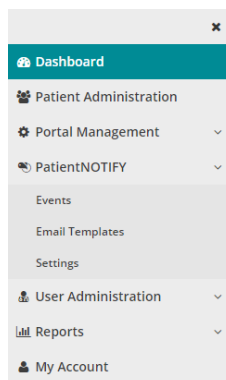


This article is used as a resource for the **OP Notify Training Program**.

Overview

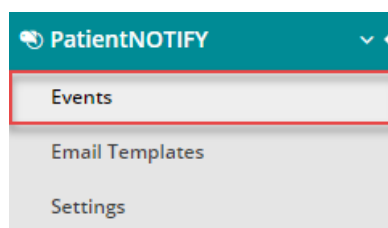
OP Notify Events allow a practice to create individualized methods for informing patients of upcoming scheduled appointments. You must have permission for Build Events in OP Notify to proceed with the below instruction.

1. Access OP Notify using the email address and password set up when you activated your account.
2. Confirm you are on the correct Practice site that is displayed in the practice dropdown on the top Patient Portal bar.
3. On the left panel click the arrow to expand the PatientNOTIFY group.

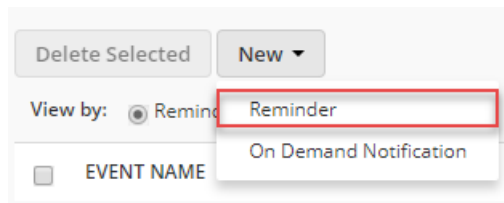


Event Information


1. Click **Events**.



2. Click the **New** button and select **Reminder**.



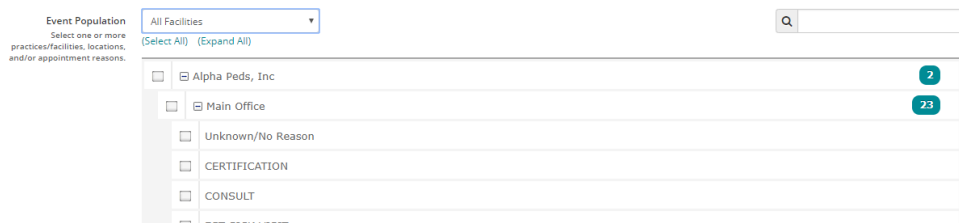
3. The Events page appears. Enter the name of the event in the **Event Name** field.

 **Note:** Best practice is to include the delivery method in the beginning of the Event name for example: Email Appointment Reminders All Patients.

4. (Optional) Further describe the event in the **Description** field.

5. Select the practice, locations, and appointment reasons using **Event Population** by performing one of the following:


- Click **Select All** if all practice, locations, and appointment reasons are included with the event.
- Click the dropdown arrow and select a practice location.
- Click **Expand All** and select the practice locations and appointment reasons from the expanded list.



6. Select the providers in the Include Providers field by performing one of the following:

- If **Select All** was chosen for the Event Population, then all providers are automatically selected in the Include Providers field. Deselect any provider to exclude from the event.
- Click **Expand All** and select the providers from the provider list.
- Type the provider in the search field, expand the location, and select the provider.

7. Enter the **Event Duration** start and end dates.

 If the end date is left blank, the event will be continuous.


1. Select one of the **Upcoming Appointment Reminder Notification Radio** buttons. You can only choose one of the radio button options.

2. Set the number of days/hours for the radio button you selected.


- To set the number of **days** prior to an appointment, enter a numeric value in the **Send a reminder days prior to appointment** field.
- To set the number of **hours** prior to an appointment, enter a numeric value in the **Send a same day reminder hours prior to appointment** field.

8. Click the **+** to expand Advanced Settings.

9. Confirm the days of the week selected for **Event Delivery Days**.

 **Note:** It is best practice to select all Event Delivery Days. This was set by the OP Notify Administrator. If you wish to change these settings, contact your OP Notify Administrator.

10. Confirm the **Notifications Cap**.

 **Note:** Advanced Settings are set by the OP Notify Administrator. If you wish to change the information, always confirm with your OP Notify Administrator.

11. Click the **Next** button.

The table below lists the types of events for appointment reminders. Click the link for detailed information on the desired event.

Event	Description
Email Reminder Event	Instruction specific to the delivery method for appointment reminders by email.
Call Reminder Event	Instruction specific to the delivery method for appointment reminders by phone call.
Mail Reminder Event	The Mail event is not available as a delivery method with OP Notify.
Text Reminder Event	Instruction specific to the delivery method for appointment reminders by a text message.
Call or Text Reminder Event	Instruction specific to the delivery method for appointment reminders using a phone call or text message. The delivery method is determined based on the Priority field in this event.

Version 14.8

OP Notify was implemented in Version 14.9.