Important Content Update Message
We are currently updating the OP Help Center content for OP 20. We appreciate your patience as we continue to make these updates. To locate the version of your software, navigate to: **Help tab > About**.

OP Notify: Email Reminder Event

Last Modified on 01/29/2021 3:25 pm EST

Version 20.6

This article is part of the **OP Notify Training Program**.

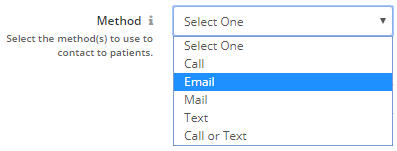
Note: The **Appointment Reminder Event** must be created before creating the Email event.

The Event page is followed by the Delivery Rule page and the Email page (when Email is selected as the delivery method). After the Event page has been completed and the **Next** button has been selected, the Delivery Rule page appears. You will set your reminder email settings on the Delivery Rule page. Once the Delivery Rules are complete and the **Next** button has been selected, the Email page appears. You will create your email message on the Email page.

Email Delivery Rule

After the Delivery Rule page appears, complete the Delivery Rule information:

1. Toggle the **Active** slide to **OFF**. It is best practice to set Active to ON when you are ready to implement the event.
2. Click the drop-down arrow for **Method** and select **Email**.



3. Enter the start and end time in the **Schedule Delivery Time** fields.
4. Confirm the **Timezone** setting.
5. Confirm the **Observe daylight savings time?** checkbox.

Note: Timezone and Observe daylight savings time are set by the OP Notify Administrator. Always confirm with your OP Notify Administrator when you wish to change those fields.

6. Click the **Next** button. The Email page is displayed.

Email Message

After the Email page appears, create the email:

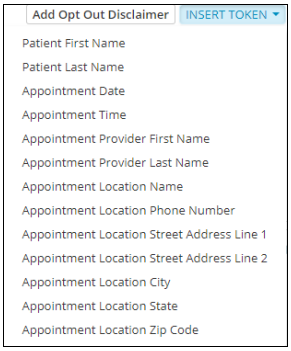
1. Navigate to the **English** tab. An English message must first be created before entering a Spanish message (optional).
2. Enter a subject of the email in the **Email Subject** field.
3. Select the type of email message:

- **Create plain text email**: This option is selected by default. Use this when you want to create an email from scratch.
- **Use email template**: Use this selection when the practice has created standard reminder templates. Email templates allow you to create customized layouts for your email messages with editable text and image areas. Selecting this

radio button will cause the Email Template drop-down to appear. Select the template from the Email Template drop-down.

> **Tip:** When creating the message in English, be sure to select a template that contains **EN**, signifying the email template is in English. If creating the message in Spanish, select the template that contains **ES**, signifying the email template is in Spanish.

4. Create the email in the **Email Message** field or alter the template to match your reminder needs. Use tokens in the Email field to personalize the message. To use a token:
   a. Locate the area of your email where you want to enter a personalized item (example a patient's first name) and place your cursor. The cursor location will indicate where the token will be placed in the Email.
   b. Select the **Insert Token** drop-down.
   c. Select the token item that you want to enter into the Email.



> **Note**: You may use the *Confirm Appointment Link* token and the *Cancel Appointment Link* token to allow parents to confirm or cancel an appointment from the email. If inserting the Cancel Appointment Link token, confirm users have been added to the IC Appointment Request Department in the Staff/Provider Directory to receive the cancelled appointment messages.

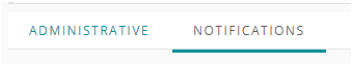
5. Select the checkbox for **Include patient opt-out link**. This will allow a parent/guardian/patient to opt out of the appointment reminders. However, if they want to be added back to the email appointment reminder, see *Adding a Patient to the Reminder Message* after the Patient Opts Out below.
6. (Optional) Test the email communication in the **Send Test Email** field. Though this step is optional, best practice indicates to test and confirm the email communication. To do this:
   a. Enter your email address in the **Enter Email Address** field.
   b. Click the **Send** button.
   c. Verify the email is received and clearly indicates your reminder.
7. Click the **Save** button.
8. (Optional) Create the Email message in Spanish:
   a. Navigate to and click the **Spanish** tab.
   b. Click the Active button so that is moves to the **ON** position.
   c. Repeat **steps 2-6** above. When entering the Email Subject and Email Message, be sure to enter the text in Spanish.
   d. Click the **Save** button.

> **Note**: The optional step of enabling Email messages in Spanish requires that the Language drop-down for the Family Contact be set to Spanish.If no Language is selected, the Language of the patient set on the Basic Information window will be used to determine the language of the message. This feature also requires that Email be selected as the Method type Delivery Rule in OP Notify.

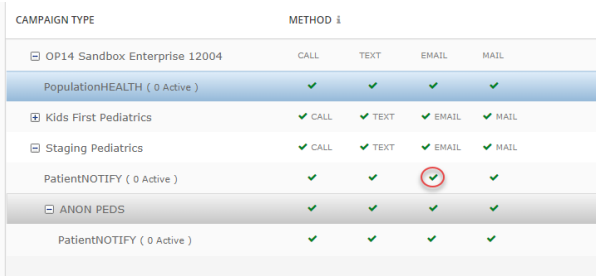
Adding a Patient to the Reminder Message after the Patient Opts Out

If a parent/guardian/patient wants to receive reminders after opting out of a message, they will need to contact the practice. The practice would need to return the patient to the reminder recipients list:

1. Select **Patient Administration**.
2. Search for and select the Patient.
3. Select **Notifications**.



4. In the **Campaign Type** field look for the reminder where the patient is opted out, you will see an X in the column.
5. Click the X, this will place a checkmark for the desired reminder.



6. Click the **Save** button.

Version 20.5

The content in this article is intended only for clients using OP Notify,powered by InteliChart.

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

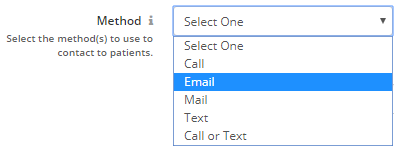
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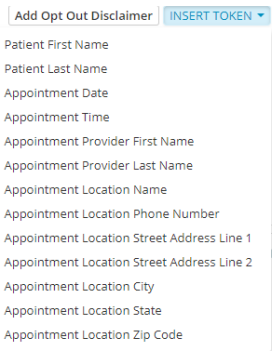
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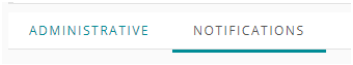
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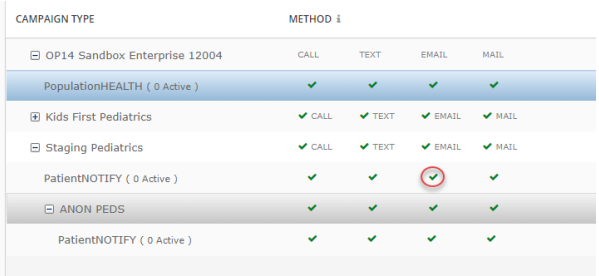
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