OP Notify: Call Reminder Event

Last Modified on 03/29/2021 11:49 am EDT

Version 20.6

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

> 📌 **Note**: The **Appointment Reminder Event** must be created before creating the Call event.

The Event page is followed by the Delivery Rule page and the Call page (when Call 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 call settings on the Delivery Rule page. Once the Delivery Rules are complete and the **Next** button has been selected, the Call page appears. You will create your voice message on the Call page.

Call 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 Call.

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.
6. Click the **Next** button to proceed to the Call information page.

Voice and Recording Message

After the Call page appears, create the voice and recording message:

1. Enter the **Call ID Number**. This field is required.
2. Select the maximum number of retries in the **Max Retries** drop-down field. The number of retries range from 0 to 9.
3. Enter the number of minutes between the retry attempts in the **Period Between Retries** field. The number of minutes range from 1 to 120.
4. Type the voice message for your appointment reminder in the **Voice Message** field. This field will be used when a person answers the call. Use tokens in the Voice Message field to personalize the message. To use a token:

   a. Locate the area of your message 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 message.
   b. Select the **Insert Token** drop-down.
   c. Select the token item that you want to enter into the message.

5. Confirm the Include touch tone options checkbox is selected.
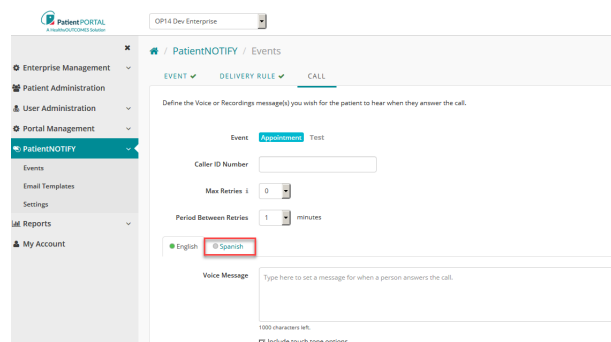
> **Note**:
> - If including all touch tone options, confirm users have been added to the IC Appointment Request Department in the Staff/Provider Directory to receive the cancelled appointment messages.
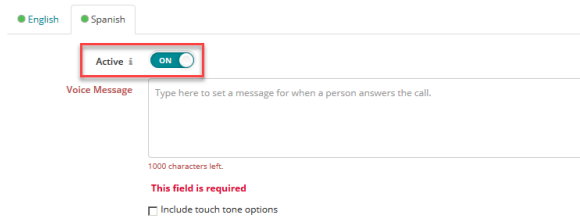> - If you do not want appointments to be cancelled using the touch tone options, include the following in your voice message field, "Press 1 to confirm the appointment or press 7 to replay the message." In addition, do not click the checkbox to include touch tone options.

6. (*Optional*) Once the message is complete, click the **Play Message** button to listen to the voice message.
7. Since not all touch tone options are available, deselect the **Include touch tone options** checkbox.
8. Type the recording message for your appointment reminder in the **Recording Message** field. This field will be used when a the call goes to voicemail. You can also copy the message from the Voice Message field and paste it into the Recording Message field, **but be certain to remove the touch tone options you added in the previous message** Use tokens in the Recording Message field to personalize the message. To use a token:

   a. Locate the area of your message 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 message.
   b. Select the **Insert Token** drop-down menu.
   c. Select the token item that you want to enter into the message.

9. (*Optional*) Enable voicemail messages and recording messages in Spanish:

   a. Copy the English version of the text from the **Voice Message** field on the **English** tab.
   b. Click on the **Spanish** tab. Clicking on the Spanish tab displays the Active button.

   c. Click on the **Active** button so that it indicates that it is **On**.

d. Paste the English version of the text in the **Voice Message** field on the **Spanish** tab. OP Notify automatically translates the English text to a Spanish voicemail when the message is sent.

e. Repeat Steps a through d for the **Recording Message** field.

> 📌 **Note**: The optional step of enabling voicemails and recordings in Spanish requires that the Language drop-down for the Family Contact be set to Spanish. If no Language is selected the recordings will use the Language of the patient set on the Basic Information window. This feature also requires that Call be selected as the Method type Delivery Rule in OP Notify.

10. (*Optional*) Once the message is complete, click the **Play Message** button to listen to the Recording Message.

11. (*Optional*) Send a test call. Enter a phone number to hear an example of the message(s). To hear the message created in the Recording Message field, the call must go to voicemail or an answering machine. To send the test call:

a. Enter your number in the **Caller ID** field. This will be the number that is displayed on the recipients caller ID.

b. Enter the phone number where you want to send the test message in the **Enter Phone Number** field.

c. Click the **Test** button. the test will be performed.

12. Click the **Save** button when the test is successful.

Version 20.5

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

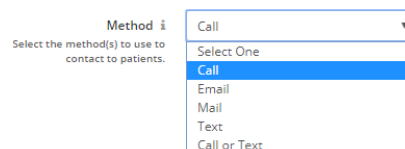This article is used as a resource for the **OP Notify Training Program**.

> 📌 **Note**: The **Appointment Reminder Event** must be created before creating the Call event.

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Call Delivery Rule

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1. Toggle the **Active** slide to **OFF**. It is best practice to set Active to ON when you are ready to implement the event.

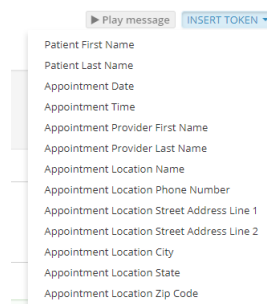2. Click the drop-down arrow for **Method** and select Call.

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.
6. Click the **Next** button to proceed to the Call information page.

Voice and Recording Message

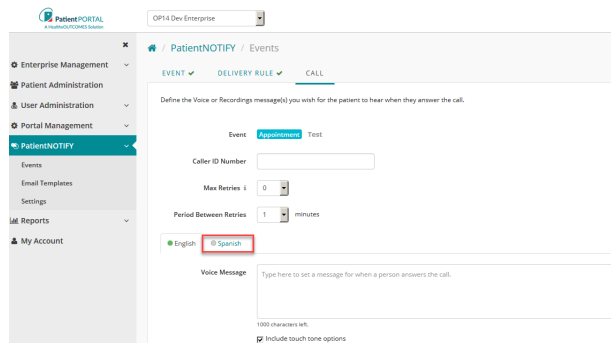After the Call page appears, create the voice and recording message:

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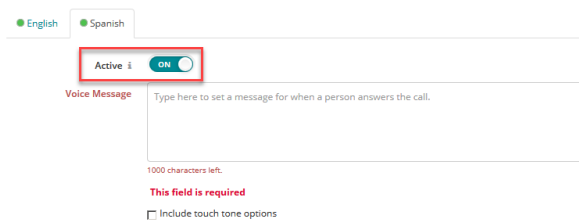

5. Include the following as the last line of your message:

   "Press 1 to confirm the appointment or press 7 to replay the message."

6. (Optional) Once the message is complete, click the **Play Message** button to listen to the voice message.
7. Since not all touch tone options are available, deselect the **Include touch tone options** checkbox.
8. Type the recording message for your appointment reminder in the **Recording Message** field. This field will be used when a the call goes to voicemail. You can also copy the message from the Voice Message field and paste it into the Recording Message field, **but be certain to remove the touch tone options you added in the previous message** Use tokens in the Recording Message field to personalize the message. To use a token:

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9. (Optional) Enable voicemail messages and recording messages in Spanish:

   a. Copy the English version of the text from the **Voice Message** field on the **English** tab.
   b. Click on the **Spanish** tab. Clicking on the Spanish tab displays the Active button.

c. Click on the **Active** button so that it indicates that it is **On**.

d. Paste the English version of the text in the **Voice Message** field on the **Spanish** tab. OP Notify automatically translates the English text to a Spanish voicemail when the message is sent.

e. Repeat Steps a through d for the **Recording Message** field.

> **Note**: The optional step of enabling voicemails and recordings in Spanish requires that the Language drop-down for the Family Contact be set to Spanish. If no Language is selected the recordings will use the Language of the patient set on the Basic Information window. This feature also requires that Call be selected as the Method type Delivery Rule in OP Notify.

10. (Optional) Once the message is complete, click the **Play Message** button to listen to the Recording Message.

11. (Optional) Send a test call. Enter a phone number to hear an example of the message(s). To hear the message created in the Recording Message field, the call must go to voicemail or an answering machine. To send the test call:

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