

OP Notify: Text Reminder Event

Last Modified on 08/22/2022 8:21 am EDT

Version 20.6

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

About

After creating the **Appointment Reminder Event**, you're taken to the Delivery Rule tab of the Event where you'll select the Delivery Method for the Reminder. Below, you'll learn how to complete the Delivery Rule when you select **Text** as the Delivery Method. After completing those details, you'll proceed to create the Messages that will be used for both an Individual and an optional Consolidated Text Message.

- [Text Delivery Rule](#)
- [Individual Text Message](#)
- [\(Optional\) Consolidated Message](#)

✖ This workflow includes the entry of text into different Message fields. **Do not copy and paste the text between Message fields.**

Text Delivery Rule

Complete the following information in the Delivery Rule tab of the Event:

1. Toggle the **Active** slide to **OFF**. Best Practice to set the Active toggle to ON when you are ready to use the Event.
2. Click the **Method** drop-down and select **Text**.
3. In the **Schedule Delivery Time** fields, enter the start and end times for when Texts should be sent.
4. Confirm the **Timezone** setting.
5. Confirm the **Observe daylight savings time?** checkbox.
6. Click the **Next** button to proceed to the Text information page.

Individual Text Message

Complete the following information in the Text tab of the Event:

1. In the Individual Message section of the window, type the message for the Text Reminder in the Text field. Include in the message:
 - Instructions for the recipients to respond with one of the following (case doesn't matter):
 - **Confirm:** Y, C, Yes, or Si
 - **Cancel:** N or No
 - Tokens to personalize the message.
 - a. Click in the Message where you want to enter a personalized item, such as the patient's first name.
 - b. Click the **Insert Token** drop-down.
 - c. Select the token item you want to insert into the message.
2. *(Optional)* Click the **Add Opt Out Disclaimer** button. This allows the recipient to send a response that will opt them out of the Text Message Reminders. Acceptable responses for successful opt-out are "Stop" or "Detener". If the patient wants to resume receiving reminders, you can reactivate them by following the steps in [Reactivate Notifications for a Patient Who](#)

Has Opted-Out.

3. *(Optional)* Enable the Message to be delivered in Spanish. This requires that the Language selected in OP for the Family Contact be set to Spanish. If no Language is selected, the message will defer to the patient's language, as set in their Basic Information. An English message must be created before entering a Spanish message.
 - a. Click the **Spanish** tab.
 - b. Toggle the **Active** slide to **On**.
 - c. Manually enter the Spanish translation.
4. *(Optional)* Send a **Test Text** for the language tab you're on, either English or Spanish.
 - a. In the **Enter Phone Number** field, enter a phone number where you want to receive the Test Text.
 - b. Click the **Test Individual Text** button.
5. *(Optional)* Proceed to the **Consolidated Text** section to enable Consolidated Messages (without clicking Save).
6. Click **Save** to save the Event without creating a Consolidated Message. Remember to turn the Active toggle to **ON** when you're ready to start using the Event.

(Optional) Consolidated Message

Consolidated Messages are optional and can be enabled to limit the number of messages a parent receives when multiple patients who share the same Primary Contact (with the same phone number), Language, and Preferred Method of Contact have scheduled appointments for the same day at the same location. The Individual Message section must contain Message text in order to save a Consolidated Message. However, this text is not included in the Consolidated Message.

1. In the Consolidated Message section of the Text Message window, select the **Send Consolidated Messages** checkbox.
2. In the Text field, type the message for the Consolidated Reminder Text Message. **Do not copy and paste from the Individual Message field.** Include in the message:
 - Instructions for the recipients to respond with one of the following (case doesn't matter):
 - **Confirm:** Y, C, Yes, or Si
 - **Cancel:** N or No
 - Tokens to personalize the message.
 - a. Click in the Message where you want to enter a personalized item, such as the patient's first name.
 - b. Click the **Insert Token** drop-down.
 - c. Select the token item you want to insert into the message.
3. *(Optional)* Click the **Add Opt Out Disclaimer** button. This allows the recipient to send a response that will opt them out of the Text Message Reminders. Acceptable responses for successful opt-out are "Stop" or "Detener". If the patient wants to resume receiving reminders, you can reactivate them by following the steps in [Reactivate Notifications for a Patient Who Has Opted-Out](#).
4. *(Optional)* Enable the Message to be delivered in Spanish. This requires that the Language selected in OP for the Family Contact be set to Spanish. If no Language is selected, the message will defer to the patient's language, as set in their Basic Information. An English message must be created before entering a Spanish message.
 - a. Click the **Spanish** tab.
 - b. Toggle the **Active** slide to **On**.
 - c. Manually enter the Spanish translation.
5. *(Optional)* Send a **Test Text** for the language tab you're on, either English or Spanish.
 - a. In the **Enter Phone Number** field, enter a phone number where you want to receive the Test Text.
 - b. Click the **Test Consolidated Text** button.
6. Click the **Save** button.
7. Remember to turn the Active toggle to **ON** when you're ready to start using the Event.

