

OP Notify: On Demand Notification Events

Last Modified on 07/17/2023 6:28 pm EDT

Version 14.19

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

About

On Demand Notification Events are used to send messages to patients with scheduled appointments on an as-needed basis. An example of this type of communication would be if the Practice needs to send a message to all patients with appointments scheduled today that the office will be closed. On-Demand Notifications are not to be used for Appointment Reminders. To create Events in OP Notify, you must have the **Build Events** permission.

Create an On Demand 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**. It is Best Practice to include the Delivery Method at the beginning of the Event Name. For example, "Text: Office Closing Due to Weather".
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 **Appointment Notification Range**:
 - a. Click the **calendar** buttons in the Start and End Date fields to select the dates of appointments to include. This can be the current date to up to one year in the future.
 - b. Click the **clock** buttons in the Start and End Time fields for the times of the appointments to include.
9. *(Optional)* Click the **Calculate** button to view the number of Notifications that will be sent based on the values above.
10. Click **+** to expand **Advanced Settings** and review the **Notifications Cap** settings. To ignore the cap, select the **Ignore Notification Cap** checkbox.



Note: Advanced Settings are set by the OP Administrator. If you wish to change the notification cap numbers, you will need to call OP support.

11. Click the **Next** button to proceed with setting the Delivery Method and entering the details for the On Demand Notification Event. See the following articles to learn how to finish creating the On Demand Notifications by the Delivery Method.

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

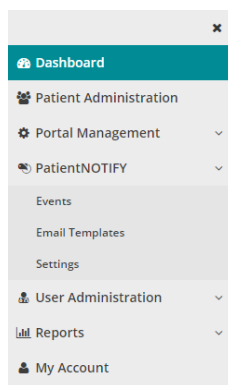


WARNING: This information is intended only for clients currently in the implementation or production phase with OP Notify functionality.

Overview

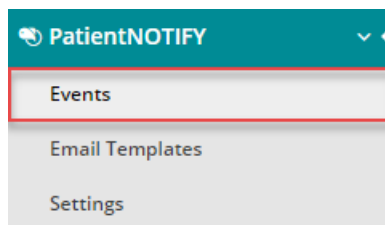
OP Notify Events allow a practice to create individualized methods for informing patients of upcoming scheduled appointments. You must have permission for Build Events in OP Notify to proceed with the below instruction.

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.

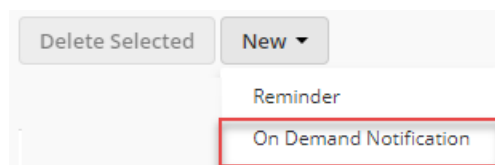


Event Information

1. Click **Events**.



2. Click the **New** button and select **On Demand Notification**.



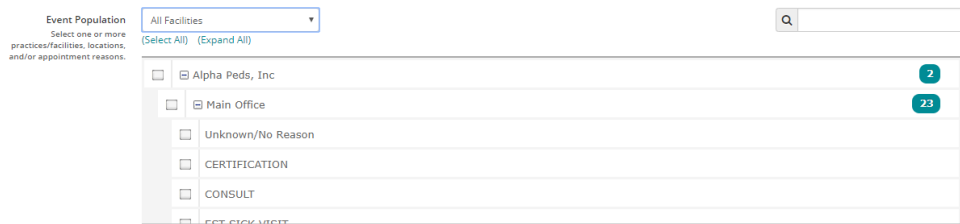
3. The Events page appears. Enter the name of the event in the **Event Name** field.



Note: Best practice is to include the delivery method in the beginning of the Event name for example: Phone Office Closing Due to Weather. There is a character limit for this field.

4. (Optional) Further describe the event in the **Description** field. There is a character limit for this 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. Set the **Appointment Notification Range**:

- Set the start and end dates. This can be up to one year in the past and up to one year in the future.
- Click the clock icons in the start and end time fields. The time range set is for the times of the appointments that you want to include in the notification.

8. (Option) Click the **Calculate** button to determine the number of notifications based on the values above.

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

10. Confirm the **Notifications Cap** settings. To ignore the cap, select the **Ignore Notification Cap** checkbox.



Note: Advanced Settings are set by the OP Administrator. If you wish to change the notification cap numbers, you will need to call OP support.

11. Click the **Next** button.

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

Event	Description
Email Notification Event	Instruction specific to the delivery method for appointment notification by email.
Call Notification Event	Instruction specific to the delivery method for appointment notification by phone call.
Mail Notification Event	The Mail event is not available as a delivery method with OP Notify.
Text Notification Event	Instruction specific to the delivery method for appointment notification by a text message.
Call or Text Notification Event	Instruction specific to the delivery method for appointment notifications 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.