Office Practicum

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 Notification Event

Last Modified on 01/29/2021 3:28 pm EST

Version 14.19

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

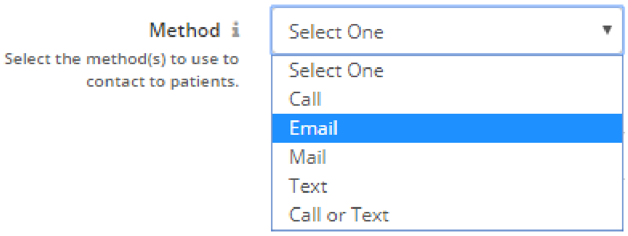
Note: The **On Demand Notification Event** must be created before creating the Email event.

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 select email as your notification method 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 Notification Delivery Rule

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

1. Verify the **Active** slide is set to **ON**. It is best practice to set Active to ON because On Demand messages are typically sent immediately after they are created.
2. Click the drop-down arrow for **Method** and select **Email**.



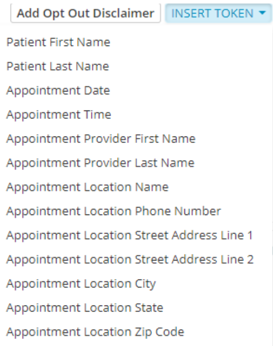
3. Click the **Next** button. The Email page appears.

Email Message

After the Email page appears, create the email:

1. Enter a subject of the email in the **Email Subject** field.
2. 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 notification 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.
3. Create the email in the Email Message field or alter the template to match your 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** dropdown.
c. Select the token item that you want to enter into the Email.



4. Click the checkbox for **Include patient opt-out link**. This will allow a patient to opt out of the appointment notifications. However, if the patient wants to be added back to the email appointment notification, see Adding a Patient to the Notification Message after the Patient Opts Out below.
5. (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:

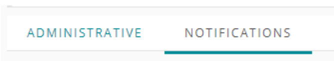
   a. Enter your email address in the **Enter Email Address** field.
   b. Click the **Send** button.
   c. Verify the email is received and clearly indicates your notification.

6. Click the **Save** button.

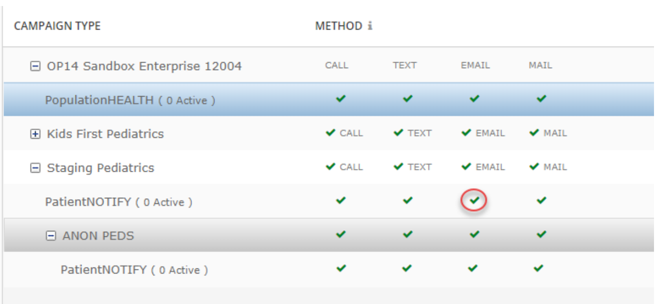
Adding a Patient to the Notification Message after the Patient Opts Out

If a patient wants to receive notifications after opting out of a notification message, the patient will need to contact the practice. The office would then need to return the patient to the notification 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 notification where the patient opted out.
5. You will see an X in the email column for the notification where the patient opted out. Click the X and place a checkmark under email for the desired notification.



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

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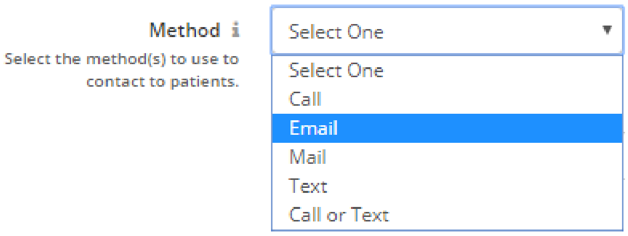

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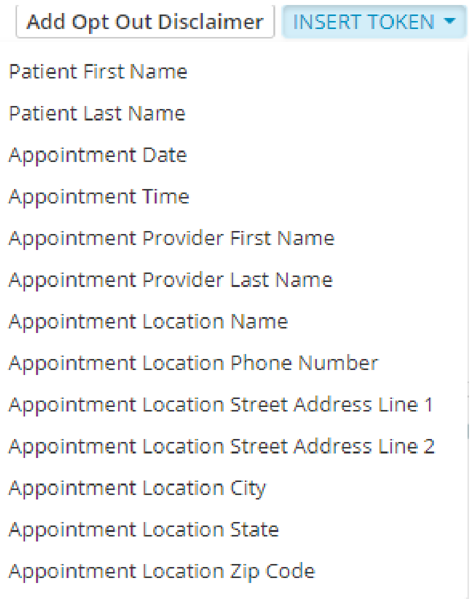

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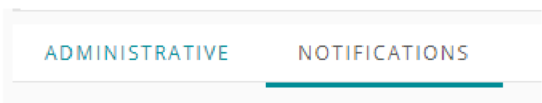

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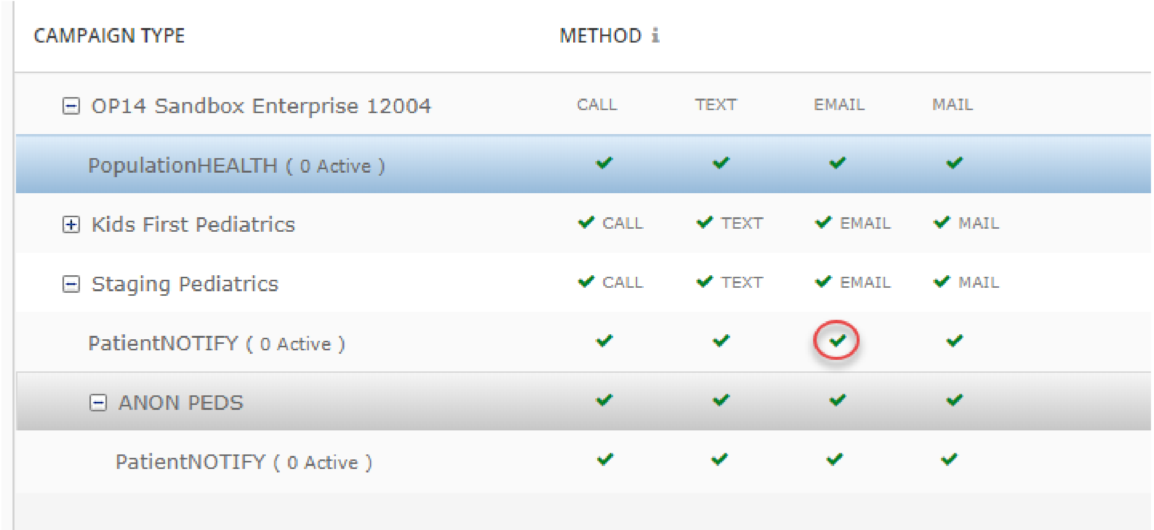

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Version 14.8

OP Notify was implemented in Version 14.9.