



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: Call 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 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. 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. 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 Call.

Method ⓘ
Select the method(s) to use to contact to patients.

Call
Select One
Call
Email
Mail
Text
Call or Text

3. 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 message for the On Demand Notification 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.

▶ Play message INSERT TOKEN ▼

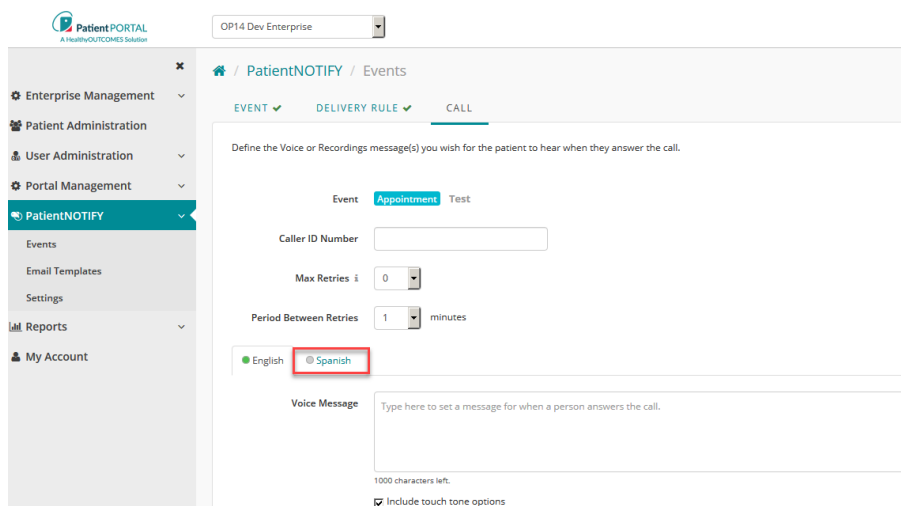
- Patient First Name
- Patient Last Name
- Appointment Date
- Appointment Time
- Appointment Provider First Name
- Appointment Provider Last Name
- Appointment Location Name
- Appointment Location Phone Number
- Appointment Location Street Address Line 1
- Appointment Location Street Address Line 2
- Appointment Location City
- Appointment Location State
- Appointment Location Zip Code

5. (Optional) Once the message is complete, click the **Play Message** button to listen to the voice message.
6. Since not all touch tone options are available, deselect the **Include touch tone options** checkbox.
7. Type the message for your On Demand Notification in the **Recording Message** field. This field will be used when the call goes to voicemail. You can also copy the message from the Voice Message field and paste it into the Recording Message field. 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.
 - c. Select the token item that you want to enter into the message.



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.

8. (Optional) Enable voicemail messages and recording messages in Spanish:
 - a. Click on the **Spanish** tab. Clicking on the Spanish tab displays the Active button.



OP14 Dev Enterprise

PatientPORTAL
A HealthVOUTCOMES Solution

Enterprise Management
Patient Administration
User Administration
Portal Management
PatientNOTIFY
Events
Email Templates
Settings
Reports
My Account

/ PatientNOTIFY / Events

EVENT ✓ DELIVERY RULE ✓ CALL

Define the Voice or Recordings message(s) you wish for the patient to hear when they answer the call.

Event: Appointment Test

Caller ID Number:

Max Retries:

Period Between Retries: minutes

Language: ☒ English ☒ Spanish

Voice Message:

1000 characters left.

☒ Include touch tone options

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

English Spanish

Active ☒ ON

Voice Message

Type here to set a message for when a person answers the call.

1000 characters left.

This field is required

☐ Include touch tone options

c. Enter the Spanish translation in the Voice and Recording message fields.

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

10. (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:

- Enter your number in the **Caller ID** field. This will be the number that is displayed on the recipients caller ID.
- Enter the phone number where you want to send the test message in the **Enter Phone Number** field.
- Click the **Test** button. the test will be performed.

11. Click the **Send** button when the test is successful.

Version 14.10



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



The **On Demand Notification 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 notification call method 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:

- 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.
- Click the dropdown arrow for **Method** and select Call.

Method

Select the method(s) to use to contact to patients.

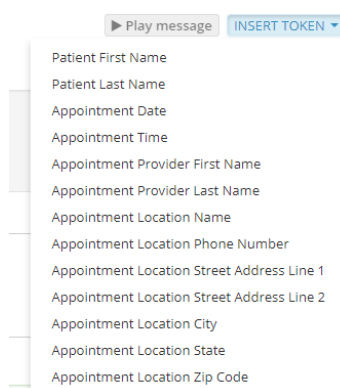
- Call
- Select One
- Call
- Email
- Mail
- Text
- Call or Text

- 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** dropdown 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 notification 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** dropdown.
 - c. Select the token item that you want to enter into the message.

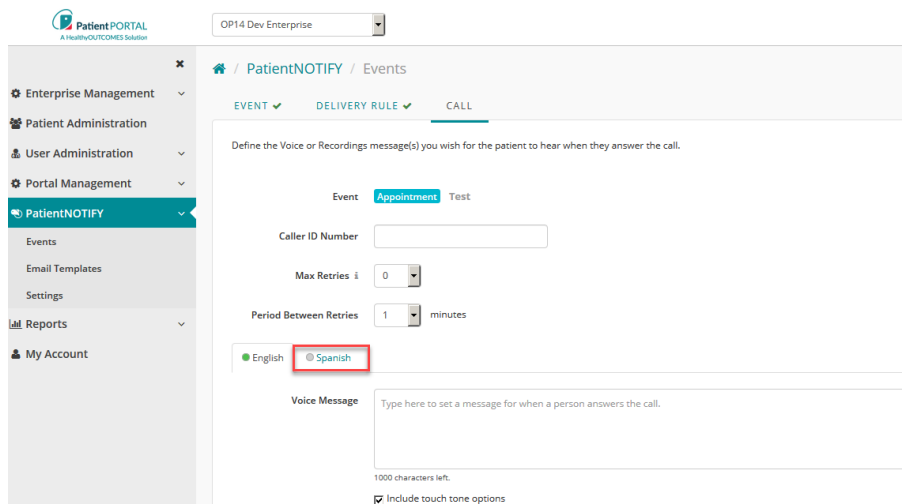


5. (Option) Once the message is complete, click the **Play Message** button to listen to the voice message.
6. Since not all touch tone options are available, deselect the **Include touch tone options** checkbox.
7. Type the recording message for your appointment notification in the **Recording Message** 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** dropdown.
 - c. Select the token item that you want to enter into the message.

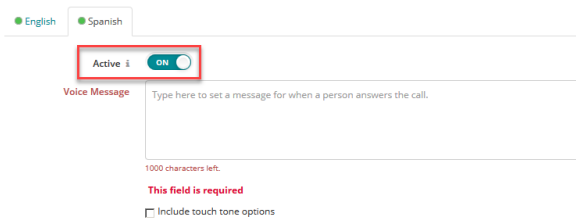


Note: The optional step of enabling voicemails and recordings in Spanish requires that the primary **Language** dropdown in the **Patient** tab of the **Patient Registry** be set to **Spanish**. This feature also requires that **Call** be selected as the **Method** type **Delivery Rule** in OP Notify.

8. (Option) 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.

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

10. (Option) 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:

- Enter your number in the **Caller ID** field. This will be the number that is displayed on the recipients caller ID.
- Enter the phone number where you want to send the test message in the **Enter Phone Number** field.
- Click the **Test** button. the test will be performed.

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

Version 14.8

OP Notify was implemented in Version 14.9.