# OP Notify: Training Program

Last Modified on 07/20/2022 12:57 pm EDT

Version 14.19

> ⚠ **Important**: The Patient Notify functionality is for sending appointment reminders and **should not** be used to advertise and/or market services. If your Practice violates the Can-Spam Act, phone service and email carriers may blacklist the Practice. This could result in all messages, including appointment reminders, being considered spam and no longer delivering any messages due to the Practice spamming the patients with marketing messages. InteliChart and OP have no way of knowing a service carrier had blacklisted a Practice until after it happens.
>
> At this time, we recommend using Patient Message eXchange for patient announcements and **STRONGLY** recommend against using any advertising, marketing language, or fee amounts/discounts in either patient engagement platform.

## About

This Training Program is designed to teach users how to create "set it and forget it" Appointment Reminders in OP Notify. For information on sending messages for Patient Recalls and other on-demand patient messaging functionality in OP, see **Patient Message eXchange (PMX)**.

## Training Program Overview

The Training Program below is split by function which contains a short video and written step-by-step instructions in the form of:

- **Help Articles** that provide detailed instructions for the actions that are addressed in each video. The information within each article is summarized in a section of a Quick Reference Guide (QRG).
- **Quick Reference Guides (QRGs)** that are designed for you to print and have available when working with OP Notify. The QRGs contain information that is outlined in more detail within multiple articles. For example, information from articles Activate Account, Settings, Roles, and Staff can all be found as sections in the Practice Administrator QRG.

The items in each function are designed to be followed **in order**. We recommend that you:

1. Watch the videos to learn what to do for each function.
2. Replay each video while engaging with OP Notify to complete the action items for that video. Pause it as necessary so that you do not miss any steps.

## OP Notify Curriculum

## Appointment Type Clean-up

The appointment type clean-up is essential for preparing for OP Notify. The appointment type clean-up utilizes the Database Viewer and SQL queries found in the Clip & Save Library on the Help Center. The **Appointment Type Cleanup** article will assist you with the necessary steps to follow.

## Practice Administration

| Video Link | Action Items | Resource Links | Resource Type |
|---|---|---|---|
| | | **Practice Administrator** | QRG |
| | 1. Stop video. | | |

| Video Link | Action Items | Resource Links | Resource Type |
|---|---|---|---|
| **Log In/Activate Your Account** (4 mins 03 secs) | 2. Activate the account. 3. Log into OP Notify. | **Activate Account** | Article |
| **Add Roles** (3 mins 53 secs) | 1. Stop video. 2. Add front desk role. | **Practice Administrator** | QRG |
| | | **Roles** | Article |
| **Add Staff Members** (10 mins 07 secs) | 1. Stop video. 2. Add staff members that will have access to OP Notify. | **Practice Administrator** | QRG |
| | | **Staff** | Article |
| **Event Settings** (3 mins 17 secs) | 1. Stop video. 2. Configure Event default values. | **Practice Administrator** | QRG |
| | | **Settings** | Article |

## Email Templates

| Video Link | Action Items | Resource Links | Resource Type |
|---|---|---|---|
| **Create New Event Email Template (Notify Templates)** (5 mins 19 secs) | 1. Stop video. 2. Create a Notify Event Email Template. | **Email Templates** | QRG |
| | | **Create New Event (Notify Template)** | Article |
| **Create New Event Email Template (On Demand Templates)** (3 mins 51 secs) | 1. Stop video. 2. Create an ON Demand Event Email Template. | **Email Templates** | QRG |
| | | **Create New Event (On Demand Template)** | Article |
| **Edit an Event Email Template** (4 mins 0 secs) | 1. Stop video. 2. Edit one of your templates. | **Email Templates** | QRG |
| | | **Edit an Event Email Template** | Article |

## Create Reminder Events

| Video Link | Action Items | Resource Links | Resource Type |
|---|---|---|---|
| **Appointment Reminder Setup (Call)** (9 mins 46 secs) | 1. Stop video. 2. Create a call reminder event. 3. Test the call reminder event. | **Create Events** | QRG |
| | | **Appointment Reminder Events** | Article |
| | | **Call Reminder Event** | Article |
| **Appointment Reminder Setup (Text)** (7 mins 24 secs) | 1. Stop video. 2. Create a text reminder event. 3. Test the text reminder event. | **Create Events** | QRG |
| | | **Appointment Reminder Events** | Article |
| | | **Text Reminder Event** | Article |
| **Appointment Reminder Setup (Email)** (6 mins 55 secs) | 1. Stop video. 2. Create a email reminder event. 3. Test the email reminder event. | **Create Events** | QRG |
| | | **Appointment Reminder Events** | Article |
| | | **Email Reminder Event** | Article |
| **Appointment Reminder Setup (Call or Text)** | 1. Stop video. 2. Create a call or text reminder event. | **Create Events** | QRG |
| | | **Appointment Reminder Events** | Article |

| Video Link | Action Items | Resource Links | Resource Type |
|---|---|---|---|
| *(7 mins 9 secs)* | 3. Test the call or text reminder event. | **Call or Text Reminder Event** | Article |
| **Appointment Reminder Setup (Generic Provider Call)** *(6 mins 43 secs)* | 1. Stop video. 2. Create a generic provider call. 3. Test the generic provider call. | **OP Notify: Create Events Generic Provider QRG** | QRG |
| | | **OP Notify: Generic Provider Event Setup** | Article |
| | | **OP Notify: Generic Provider Call Reminder Event** | Article |
| | | **OP Notify: Generic Provider Text Reminder Event** | Article |
| | | **OP Notify: Generic Provider Email Reminder Event** | Article |
| | | **OP Notify: Generic Provider Call or Text Reminder Event** | Article |

## On Demand Notifications

| Video Link | Action Items | Resource Links | Resource Type |
|---|---|---|---|
| **On Demand Notification (Call)** *(7 mins 42 secs)* | 1. Stop video. 2. Create a call notification. 3. Test the call notification. | **On Demand Notification** | QRG |
| | | **On Demand Notification Events** | Article |
| | | **Call Notification Event** | Article |
| **On Demand Notification (Text)** *(9 mins 59 secs)* | 1. Stop video. 2. Create a text notification. 3. Test the text notification. | **On Demand Notification** | QRG |
| | | **On Demand Notification Events** | Article |
| | | **Text Notification Event** | Article |
| **On Demand Notification (Email)** *(5 mins 33 secs)* | 1. Stop video. 2. Create a email notification. 3. Test the email notification. | **On Demand Notification** | QRG |
| | | **On Demand Notification Events** | Article |
| | | **Email Notification Event** | Article |
| **On Demand Notification (Call or Text)** *(7 mins 52 secs)* | 1. Stop video. 2. Create a call or text notification. 3. Test the call or text notification. | **On Demand Notification** | QRG |
| | | **On Demand Notification Events** | Article |
| | | **Call or Text Notification Event** | Article |

## Reports

| Video Link | Action Items | Resource Links | Resource Type |
|---|---|---|---|

| Video Link | Action Items | Resource Links | Resource Type |
|---|---|---|---|
| **OP Notify: Notification Reports** | 1. Read the article and watch the included video.<br>2. Run an Appointment Reminder Report.<br>3. Run an On Demand Notification Report. | **Reports** | QRG |

## Recalls

You cannot run recalls with OP Notify at this time. To run recalls, use **PMX**.

## FAQs

FAQs regarding OP Notify, **click here**.

Version 14.10

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

## Overview

The OP Notify training program is designed to assist users with understanding OP Notify functions. Please follow the program in order to obtain a better understanding of the material presented.

It is recommended that you do the following:

1. Watch the videos to learn what to do for each function.
2. Replay each video while engaging with OP Notify to complete the actions items for that video.

> ⚠️ **Note**: As you follow along with the video while configuring OP Notify, pause the video as necessary so that you do not miss any steps.

If you need step-by-step written directions, click the **Resource Links** listed in the row:

- **Articles** provide detailed instructions for the actions that are addressed in each video. The information within each article is summarized in a section of a Quick Reference Guide (QRG).
- **QRGs** are designed for you to print and have available when working with OP Notify. The QRGs contain information that appears in more detail within multiple articles. For example, information from articles Activate Account, Settings, Roles, and Staff can all be found as sections in the Practice Administrator QRG.

> ℹ️ FAQs regarding OP Notify, **click here**.

## OP Notify Curriculum

The curriculum is split by function. Locate your desired function and follow the curriculum accordingly. Resource links are available for each task performed by the function.

## Practice Administration

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| | | **Create New Event (On Demand Template)** | Article |
| **Edit an Event Email Template**<br>(4 mins 0 secs) | 1. Stop video.<br>2. Edit one of your templates. | **Email Templates** | QRG |
| | | **Edit an Event Email Template** (to be supplied) | Article |

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| | | **Create Events** | QRG |

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| | | **OP Notify: Generic Provider Text Reminder Event** (to be supplied) | Article |
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| | | **On Demand Notification Events** | Article |
| | | **Call or Text Notification Event** | Article |

## Reports

| Video Link | Action Items | Resource Links | Resource Type |
|---|---|---|---|
| **Appointment Reminder Reports** *(no video available)* | 1. Read Resources. 2. Run an Appointment Reminder Report. | **Reports** | QRG |
| | | **Appointment Reminders Reports** | Article |

| Video Link | Action Items | Resource Links | Resource Type |
|---|---|---|---|
| **On Demand Notification Reports** *(no video available)* | 1. Read Resources. 2. Run an On Demand Notification Report. | **Reports** | QRG |
| | | **On Demand Notifications Reports** | Article |

## Recalls

You cannot run recalls with OP Notify at this time. To run recalls, use **PMX**.

## FAQs

FAQs regarding OP Notify, **click here**.

Version 14.8

OP Notify was implemented in Version 14.9.