OP Notify: Create Event Reminder Templates

Last Modified on 01/29/2021 3:38 pm EST

Version 14.19

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

Overview

Email templates can be created and saved with OP Notify in order to provide a preset format for your email reminder event correspondences. After the template is created, you have the option to select that template during a email reminder event. The template will provide you with the overall email structure that can then be altered to suit your practice needs for that specific reminder event. Creating templates helps to save time so that you do not have to recreate the email each time you need to create an email reminder event.

Create the Event Reminder Email Template

This sections provides a series of steps to create an event reminder email template.

Begin the New Template

To create an Email Notify template:

1. Access OP Notify using the email address and password established 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.
4. Select **Email Templates**.

📢 PatientNOTIFY	⌄
Events	
Email Templates	
Settings	

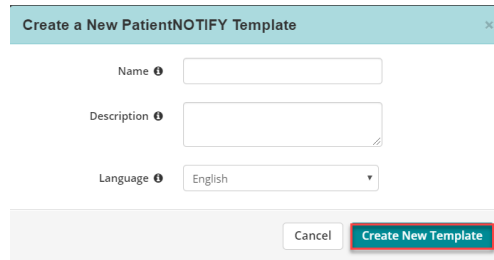5. Click the **Create New Template** button.
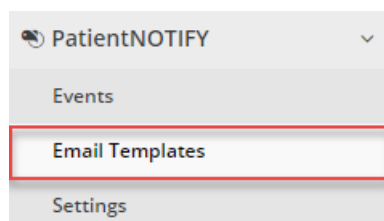
Create New Template ▾
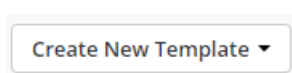
6. Select the type of template:**Create New Appointment Reminder template**. The Create New PatientNOTIFY Template window appears.
7. Enter the template name in the**Name** field.
8. Enter the template description in the**Description** field.
9. Select the language from the**Language** drop-down menu.

10. Click the **Create New Template** button. The Email Template Editor appears.

Create a New PatientNOTIFY Template

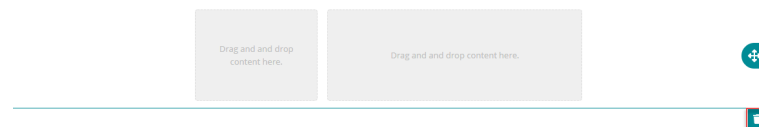|	
Name ⓘ	[ ]
Description ⓘ	[ ]
Language ⓘ	English ▾

Cancel   **Create New Template**

Create Sections

1. Click the **+ Add Section** button.
2. Choose what section you would like to add. Each selection determines how the sections will appear for each area of the email template.
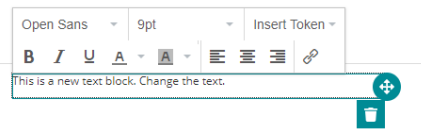

+ Add Section

3. Repeat for each section of the template you would like to add.
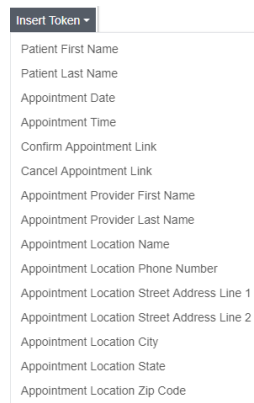
Add Text to Sections

1. Locate the **Text Box** icon   .
2. Drag and drop the **Text Box** icon to the section where you would like to add text.

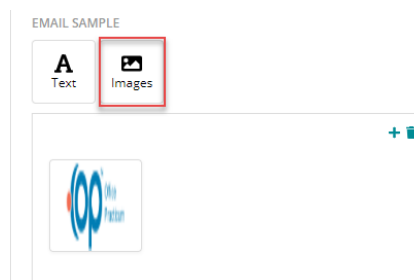3. Click in the text box. The formatting box appears.

4. Enter your text. You can alter the font, size, and formatting for the text.
5. 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.
6. Select the **Insert Token** drop-down.
7. Select the token item that you want to enter into the message.

8. Click out of the text box when you are finished. Repeat for any additional areas where you want to add text in the template.

Add an Image to a Section

1. Click the **Image** icon. The Available Image Library appears. If an image you want to add is not in the Image Library, you will need to add the image to the library. To add an image to the available images library, see **Add an Image to the Available Images Library**.
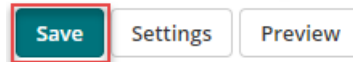
2. Drag and drop the **Image** icon to the section where you would like to add the image.

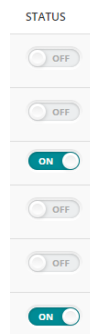3. Click out of the section box when complete.

Complete your Template

1. When the sections are added and complete with text and images, click the Save button.

Save   Settings   Preview

2. Click the **Back to Email Templates** button.

← Back to Email Templates

3. Locate your template in the Email Templates list. If the template is ready to be implemented, toggle the template **Status** from OFF to ON. Doing this will make template accessible as an option when an email reminder is about to be created.

STATUS

OFF
OFF
ON
OFF
OFF
ON

Version 14.10

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

> ℹ️ This article is used as a resource for the **OP Notify Training Program**.

Overview

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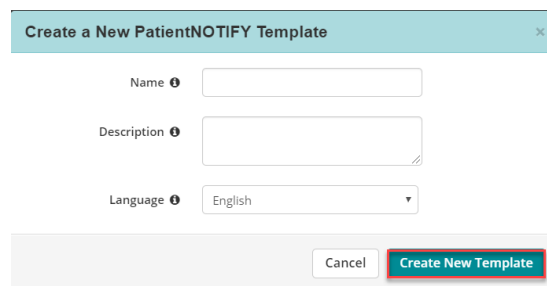4. Select **Email Templates**.
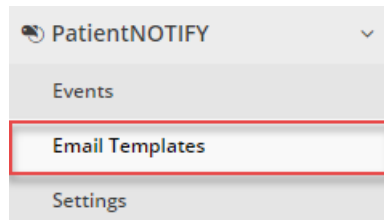
5. Click the **Create New Template** button.
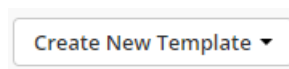
6. Select the type of template:**Create New PatientNotify template**. The Create New PatientNOTIFY Template window appears.
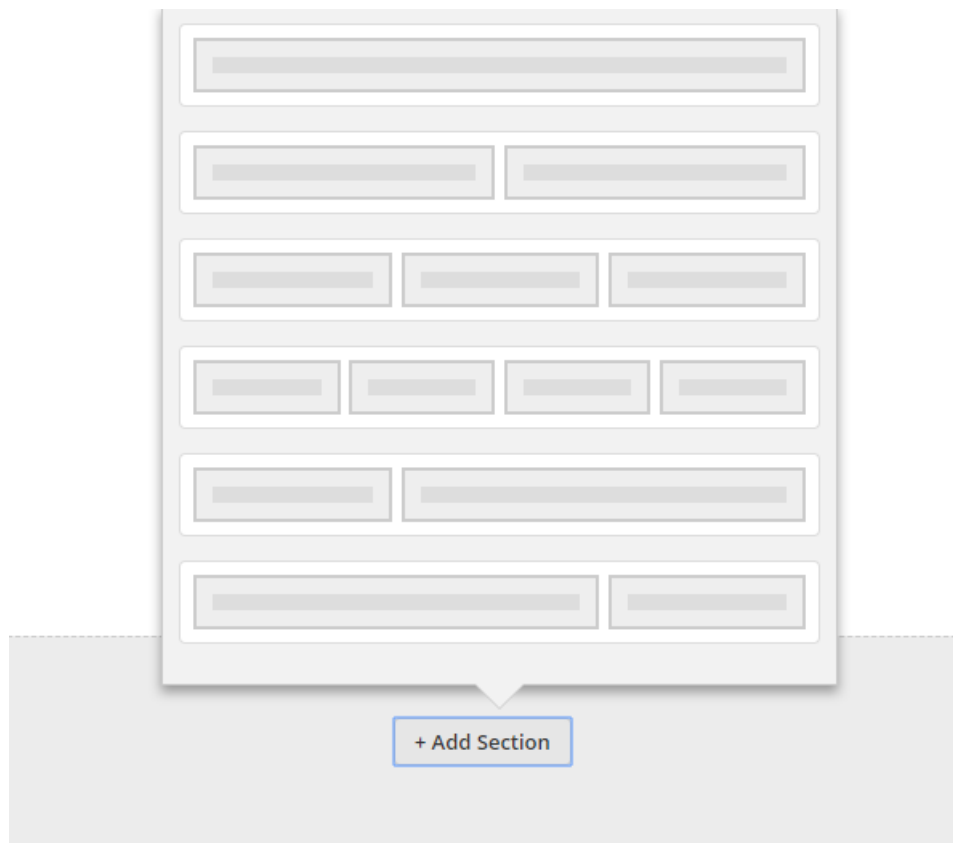

7. Enter the template name in the**Name** field.
8. Enter the template description in the**Description** field.
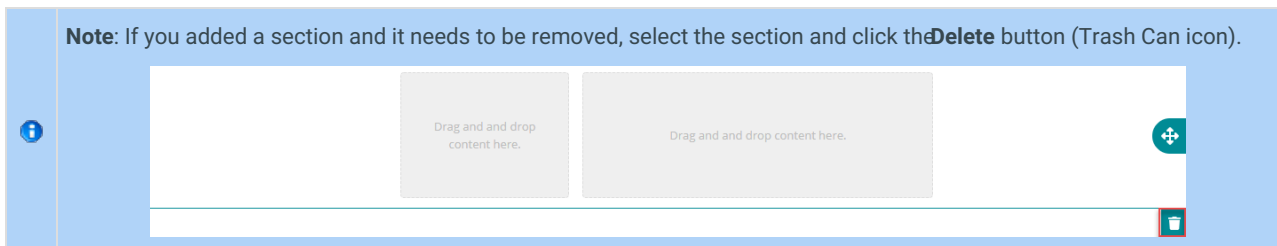9. Click the **Create New Template** button. The Email Template Editor appears.

Create Sections

1. Click the **+ Add Section**.
2. Choose what section you would like to add. Each selection determines how the sections will appear for each area of the email template.

+ Add Section
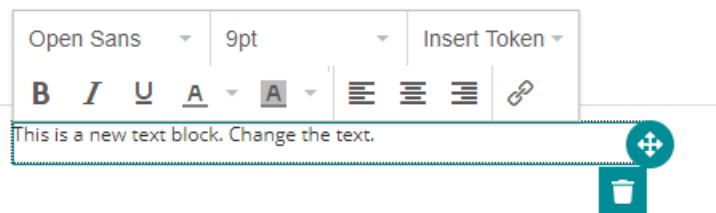
3. Repeat for each section of the template you would like to add.

Add Text to Sections

1. Locate the **Text Box** icon ![A Text icon] .
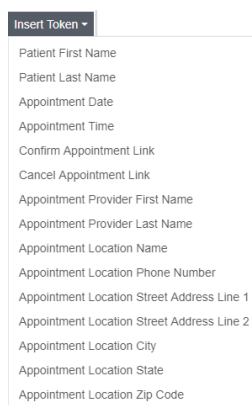2. Drag and drop the **Text Box** icon to the section where you would like to add text.

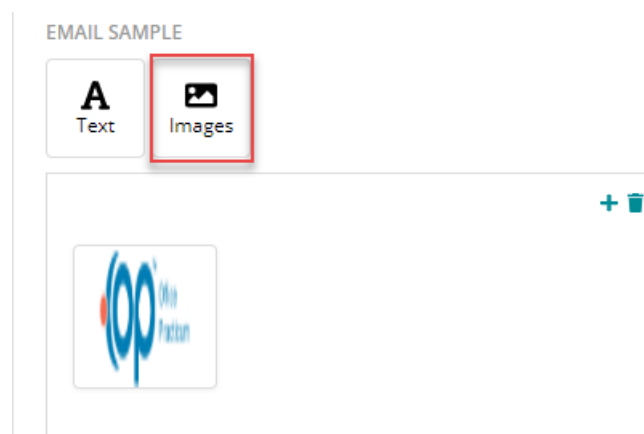3. Click in the text box. The formatting box appears.

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6. Select the **Insert Token** dropdown.
7. Select the token item that you want to enter into the message.

8. Click out of the text box when you are finished. Repeat for any additional areas where you want to add text in the template.

Add an Image to a Section

1. Click the **Image** icon. The Available Image Library appears. If an image you want to add is not in the Image Library, you will need to add the image to the library. To add an image to the available images library, see **Add an Image to the Available Images Library**.
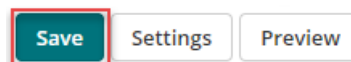

2. Drag and drop the **Image** icon to the section where you would like to add the image.

3. Click out of the section box when complete.

Complete your Template

1. When the sections are added and complete with text and images, click the Save button.

2. Click the **Back to Email Templates** button.

3. Locate your template in the Email Templates list. If the template is ready to be implemented, toggle the template **Status** from OFF to ON. Doing this will make template accessible as an option when an email reminder is about to be created.

STATUS