



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: Generic Provider Call Reminder Event

Last Modified on 01/29/2021 3:43 pm EST

Version 20.6

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



Note: The **Generic Provider Appointment Reminder 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 reminder call settings 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:

1. Toggle the **Active** slide to **OFF**. It is best practice to set Active to ON when you are ready to implement the event.
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	

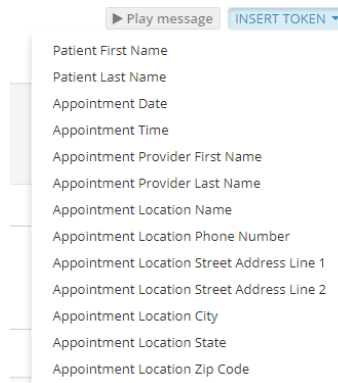
3. Enter the start and end time in the **Schedule Delivery Time** fields.
4. Confirm the **Timezone** setting.
5. Set the Schedule Delivery Time by clicking the clock icons.
6. Confirm the **Observe daylight savings time?** checkbox. To make a change, click the drop-down arrow and select the proper time zone from the list.
7. 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 voice message for your appointment reminder 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:

- 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.
- Select the **Insert Token** drop-down.
- Select the token item that you want to enter into the message.



- Confirm the Include touch tone options checkbox is selected.

☒ Include touch tone options

The following touch tone options will be included with the above message.

Press 1 to Confirm Appointment

Press 2 to Cancel Appointment

Press 7 to Hear the Message Again

Note:



- If including all touch tone options, confirm users have been added to the IC Appointment Request Department in the Staff/Provider Directory to receive the cancelled appointment messages.
- If you do not want appointments to be cancelled using the touch tone options, include the following in your voice message field, "Press 1 to confirm the appointment or press 7 to replay the message." In addition, do not click the checkbox to include touch tone options.

- (Optional) Once the message is complete, click the **Play Message** button to listen to the voice message.
- Since not all touch tone options are available, deselect the **Include touch tone options** checkbox.

Voice Message

Hello, this is [AppointmentLocationName] calling to remind you of an appointment for [PatientFirstName] on [AppointmentDate] at [AppointmentTime] for a flu shot. Press 1 to Confirm the appointment or 7 to hear this message again. If you are unable to keep this appointment, please call the office at [AppointmentLocationPhoneNumber] to reschedule. We look forward to seeing [PatientFirstName] on [AppointmentDate] at [AppointmentTime].

536 characters left.

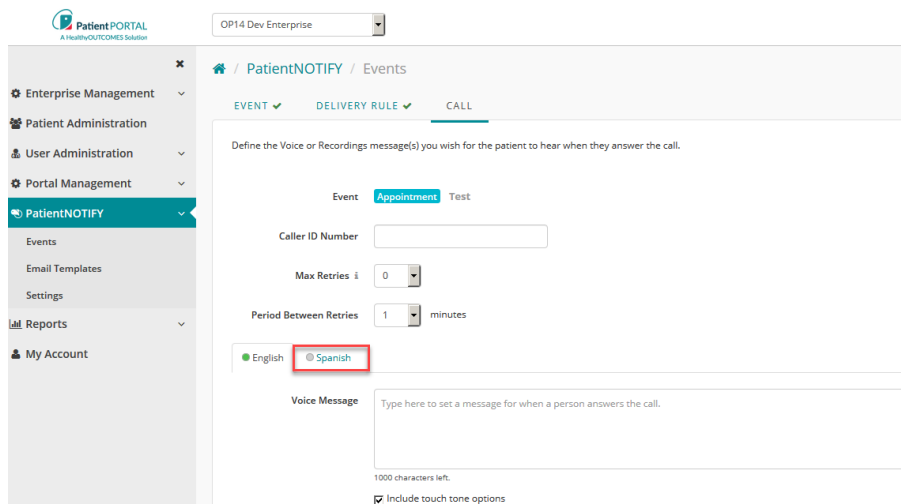
☐ Include touch tone options

- Type the recording message for your appointment reminder 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:

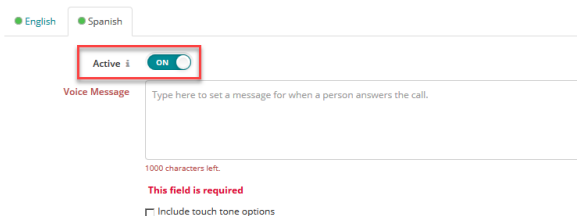
- Locate the area of your message where you want to enter a personalized item (example a patient's first name) and place your cursor. The cursor location will indicate where the token will be placed in the message.
- Select the **Insert Token** drop-down.
- Select the token item that you want to enter into the message.

- (Optional) Enable voicemail messages and recording messages in Spanish:

- Copy the English version of the text from the **Voice Message** field on the **English** tab.
- 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**.

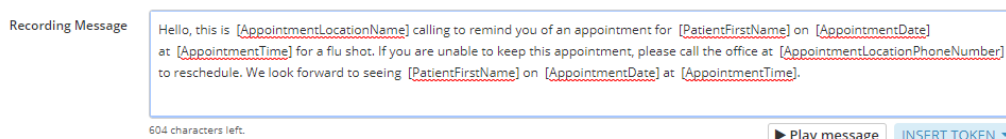


- d. Paste the English version of the text in the **Voice Message** field on the **Spanish** tab. OP Notify automatically translates the English text to a Spanish voicemail when the message is sent.
- e. Repeat Steps a through d for the **Recording Message** field.



Note: The optional step of enabling voicemails and recordings in Spanish requires that the primary Language drop-down 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.

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



11. (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.

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

Version 20.5

The content in this article is intended only for clients using OP Notify, powered by IntelliChart.

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



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2. 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

3. Enter the start and end time in the **Schedule Delivery Time** fields.
4. Confirm the **Timezone** setting.
5. Set the Schedule Delivery Time by clicking the clock icons.
6. Confirm the **Observe daylight savings time?** checkbox. To make a change, click the dropdown arrow and select the proper time zone from the list.
7. 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.
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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 reminder 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.

▶ 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. Include the following as the last line of your message:

"Press 1 to confirm the appointment or press 7 to replay the message."

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

7. Since not all touch tone options are available, deselect the **Include touch tone options** checkbox.

Voice Message

Hello, this is [AppointmentLocationName] calling to remind you of an appointment for [PatientFirstName] on [AppointmentDate] at [AppointmentTime] for a flu shot. Press 1 to Confirm the appointment or 7 to hear this message again. If you are unable to keep this appointment, please call the office at [AppointmentLocationPhoneNumber] to reschedule. We look forward to seeing [PatientFirstName] on [AppointmentDate] at [AppointmentTime].

536 characters left.

☐ Include touch tone options

▶ Play message INSERT TOKEN ▼

8. Type the recording message for your appointment reminder 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:

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

9. (Option) Enable voicemail messages and recording messages in Spanish:

- Copy the English version of the text from the **Voice Message** field on the **English** tab.
- Click on the **Spanish** tab. Clicking on the Spanish tab displays the Active button.

OP14 Dev Enterprise

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 0

Period Between Retries 1 minutes

English Spanish

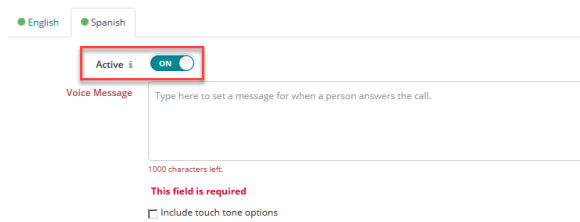
Voice Message

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

1000 characters left.

☒ Include touch tone options

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



The screenshot shows the OP Notify interface with two tabs: 'English' and 'Spanish'. The 'Active' button is highlighted with a red box and is currently 'ON'. Below the tabs is the 'Voice Message' field, which contains the text 'Type here to set a message for when a person answers the call.' and a character count of '1000 characters left.' A red error message 'This field is required' is displayed below the text area. There is also a checkbox labeled 'Include touch tone options'.

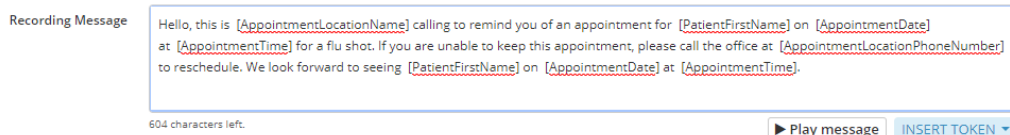
d. Paste the English version of the text in the **Voice Message** field on the **Spanish** tab. OP Notify automatically translates the English text to a Spanish voicemail when the message is sent.

e. Repeat Steps a through d for the **Recording Message** field.



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.

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



The screenshot shows the 'Recording Message' field with a text area containing a sample message: 'Hello, this is [AppointmentLocationName] calling to remind you of an appointment for [PatientFirstName] on [AppointmentDate] at [AppointmentTime] for a flu shot. If you are unable to keep this appointment, please call the office at [AppointmentLocationPhoneNumber] to reschedule. We look forward to seeing [PatientFirstName] on [AppointmentDate] at [AppointmentTime].' The character count is '604 characters left.' Below the text area are two buttons: 'Play message' and 'INSERT TOKEN'.

11. (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.

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