

Why are Documents not flowing to the portal?

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There are a number of reasons why a Document that was shared to the portal does not actually flow to the portal. Listed below are reasons a Document doesn't flow to the portal, and where you can review the necessary information.

- Verify in the Staff/Provider Directory that the user who sent the Document to the portal has a Practice Portal user account. This includes confirming in the Practice Portal that this user's portal account lists them as the Associated user.
- Verify in the patient's Basic Information that the patient for whom the Document was sent has an active portal account.



Tip: If either of the above reasons are why a Document didn't flow to the portal, the user who initiated the Document sharing will receive a failure message in the Unread Portal tab of the Message Center with a subject of **Document failed to deliver**.

- Verify that the Document that was shared has a Visibility of Any Staff Member
- Verify that the Shared to Portal checkbox is selected for the Document
- Verify that the Document (if shared via Document Management) has an Item Type and Category
- Verify that the Document (if imported into/shared via Document Management) has a File Type and File Extension



Important: The File Type and File Extension will automatically populate when importing a PDF, JPG, TIF, etc.