

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**

Resend a Survey that Failed to be Delivered to the Portal

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Version 20.9

Overview

Surveys that failed to be delivered to the portal can easily be resent to the portal for parent/patient completion. Before resending the Survey, the reason for the error must be corrected, or the Survey delivery will fail again. For example, if a Survey failed to be delivered to the portal because the patient does not have an active portal account, the parent/patient must first activate their portal account before the resending of the Survey is successful.

Once the reason for failure has been corrected, the **Resend** button located in the Tasks window and in the Tasks section of the Patient Chart can be used to resend the Survey to the portal. The **Resend button is only displayed when the selected task meets the following criteria:**

- The selected task is for a **Survey**
- The Survey was ordered after the practice updated to OP 20.9
- The Survey task was assigned to the **Patient** department
- The Survey task status is **Queued**

If the above criteria for the selected task is not met, the Resend button is not displayed.

Resend a Survey to the Portal

1. Navigate to the Tasks window by following one of the paths below:
 - Clinical, Practice Management, or Billing tab > Tasks button
 - Clinical, Practice Management, or Billing tab > Patient Chart button > Tasks
2. Select the task for the failed Survey.
3. Click the **Resend** button.
4. Click **OK** to confirm you want to resend the Survey. The task status is updated from Queued to Not Started.