

RecordSync

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Providers can use **RecordSync** to comprehensively review their patient's clinical history, including previous encounters, diagnoses, lab results, allergies, medications, immunizations, and other treatments. By querying trusted data sources across different healthcare systems, **RecordSync** pulls relevant patient records and care summaries directly into DrChrono, ensuring you have all the insights you need to make confident care decisions.



Eligible clinicians can attest to the Merit-based Incentive Payment System (MIPS) Promoting Interoperability (PI) performance category for the Health Information Exchange (HIE) requirement by participating in the RecordSync bi-directional exchange.

DrChrono is integrated with Surescripts Record Locator & Exchange (RLE), also known as health information exchange. Surescripts' RLE service is a critical component that helps EHR integrators access and participate in Carequality, a national health data exchange framework. It is a bidirectional integration to exchange data in a hub and spoke model for requesters/responders within the framework. RecordSync shares real-time data with Carequality, but only if the requester has the same patient and is connected to Carequality.

RLE provides support to retrieve records using the HL7® FHIR® standard transactions, ultimately allowing documents to be merged or saved to the patient chart.

Setup

Set up permissions

Providers or staff members must set up permissions to use **RecordSync**.

1. Select **Account > Staff Permissions**.
2. Select **View**.

The permissions window opens.

3. Select **Edit Permissions**.
4. Select the **Access RecordSync** checkbox and then select **Save Permissions**.

Set up the organization profile

You must set up your practice's organization profile.

1. Select **Account > Organization Profile**.

The text boxes automatically pull in information from the following sources:

- **Organization name:** **Account > Account Settings > Medical Billing > Practice Official Name**
- **Phone number and address:** **Account > Offices**

2. Select **Save**.

Organization Profile Save

i The following fields are necessary to ensure RecordSync can connect and function properly.

* Required field

Organization Name *

Phone Number *

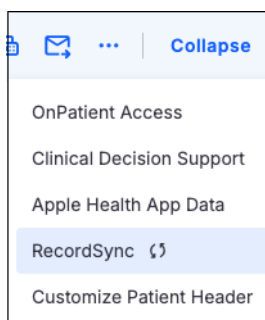
Address

Street *

City * **State *** **Zip Code ***

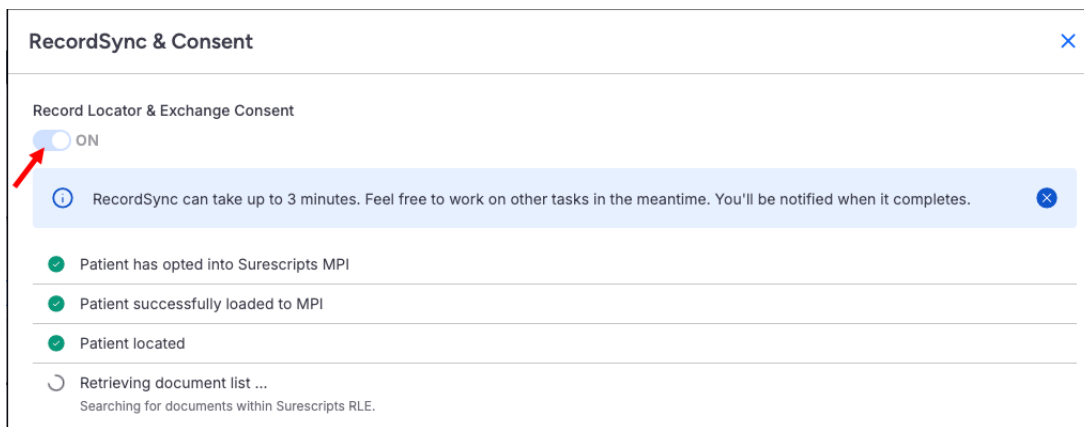
Retrieve clinical documents

1. In the patient chart's **Patient Header**, select **More actions** (three dots) ⋮ and then select **RecordSync**.



The **RecordSync & Consent** side panel opens. Once you turn on consent, **RecordSync** starts gathering patient information, which may take several minutes. While the search is in progress, you can close the side panel and continue working on other tasks. A message appears in the lower left corner once the process is complete.

2. Turn the **Record Locator & Exchange Consent** toggle switch on.



The **Adding Your Organization** message appears if this is the first time using **RecordSync**. When the search is successful, the results appear in the **Record List**.



You perform all actions within the side panel. Select a breadcrumb link (top left corner) to return to a previous side panel.

Record List

Multiple filters, search, and sort options exist. Once records are queried, they are stored for 30 days. A new query is automatically triggered after 30 days or upon manual refresh (select **Refresh Records**).

RecordSync & Consent / ×

Record List

Document Search has returned **22 results** [Sharing History](#) [Refresh Records](#)

As of: 01/06/2025, 8:15 PM

Filter By Encounter Sort By

Title MM/DD/YYYY MM/DD/YYYY Newest First

Start Date End Date

[Reset filter](#)

Progress Note Available

Type Progress Note (11506-3)	Source View Source	Encounter 01/24/2023, 8:00 AM 01/25/2023, 8:00 AM
Category —	Author —	

Patient Summary Reconciled

Type Clinical Document (81214-9)	Source My Clinic1737669788.834864	Encounter — —
Category Clinical Document (81214-9)	Author —	

Surescripts Location Summary Imported [Reconcile](#)

Type Location Summary (34133-9)	Source Surescripts	Encounter — —
Category Location Summary (34133-9)	Author —	

Record List actions

Task	Action
Open the Sharing History side panel to see who requested the documents and the sharing date. The sharing history is what was externally shared with requesters.	Select Sharing History .
Open the document from within the Sharing History side panel.	Select View Document .
Manually refresh the Record List page.	Select Refresh Records .
Open the document.	Select View Document .
Import a document.	Select Import Document .
Import a document from within the document.	Select Import .
Reconcile a document.	Select Reconcile .

RecordSync & Consent / Record List / Sharing History

Requested By	Date	Action
Memorial Hospital	07/14/24 at 10:20 a.m.	View Document
Memorial Hospital	06/15/24 at 1:55 p.m.	View Document
Memorial Hospital	06/15/24 at 2:12 p.m.	View Document
Memorial Hospital	05/27/24 at 4:11 p.m.	View Document
Forest Hills Hospital	05/22/24 at 7:44 a.m.	View Document
Metro-General Hospital	05/05/24 at 12:20 p.m.	View Document
Ravencroft Institute	04/09/24 at 3:32 p.m.	View Document
Ravencroft Institute	04/02/24 at 8:14 a.m.	View Document
Ravencroft Institute	03/29/24 at 10:15 a.m.	View Document

1 - 10 of 42 records

Document statuses

Status	Description
Available	The document hasn't been retrieved from the external organization.
Error	The document has an issue
Importing	Actively importing the document to start the reconciliation process.
Imported	The document is waiting in the reconciliation queue. If not a CCD, it has been imported into the patient's chart in Documents . Select Reconcile to continue the reconciliation process.
Retrieving	Actively retrieving the document from the external organization.
Retrieved	The document has been retrieved and is available for viewing, download, or import.
Reconciled	The CCD document data elements have been reconciled into the patient chart.

RecordSync & Consent

You can perform the following actions on the **RecordSync & Consent** side panel:

- Turn on or off **RecordSync** consent
- Manually refresh the **Record List**
- View the **Record List**

RecordSync & Consent ✕

Record Locator & Exchange Consent
 ON

Last Modified By: staffmember on 01/06/2025, 8:15 PM

i RecordSync can take up to 3 minutes. Feel free to work on other tasks in the meantime. You'll be notified when it completes. ✕

- ✔ Patient has opted into Surescripts MPI

- ✔ Patient successfully loaded to MPI

- ✔ Patient located

- ✔ Document list retrieved

[Refresh Records](#) [View Records](#)

Imported clinical documents

Imported clinical documents are uploaded to the patient chart (**Documents > Uploaded Documents**).

Uploaded Documents

	Date	Description	Additional URL	Document Tags	Uploaded on	Actions
	01/27/2025	C-CDA Import		surescripts c-cda imported	01/27/2025	Fax + Task ✎ ✕
	01/27/2025	C-CDA Import		surescripts c-cda imported	01/27/2025	i + Task ✎ ✕
	01/02/2023	Progress Note		surescripts	01/06/2025	i + Task ✎ ✕

Reconcile clinical data

Consolidated clinical document architecture (C-CDA) reconciliation matches information from a C-CDA file with a patient's electronic health record. This process can automatically start to reconcile problems, medications, and allergies and merge this data with the patient chart.

1. Once a CCD has been successfully imported, the reconciliation process automatically begins. If the process doesn't start, select **Reconcile**. You can also select **Reconcile** when you view an imported CCD.

Continuity of Care Document Imported i [Reconcile](#)

Type	Source	Encounter
Continuity of Care Document (34133-9)	Alpha Oncology	—
Category	Author	
Continuity of Care Document (34133-9)	Anna Provider	

The page to preview the clinical document opens.

Preview This Document Before Uploading to the Patient Record!

Import Clinical Record:

Transition of Care	<input type="text"/>	
Date	<input type="text"/>	Date of document, necessary to put this document in the patient's timeline.
Description	<input type="text"/>	Description of document.
Is structured data	<input checked="" type="checkbox"/>	If true, is lab result and should be automatically added to patient lab result sets after finalizing. For C-CDA it will import medications, allergies and problems.
Lab result processed	<input type="checkbox"/>	If true, lab has been processed and should not be reprocessed.
Type of document	<input type="text" value="C-CDA — Consolidated Clinical Document Architect"/>	Optional Description of document.
<input type="button" value="Cancel"/> <input type="button" value="Finalize File"/> <input type="button" value="Finalize File & Start Reconciliation"/>		

2. Do one of the following:

- To import the document to the patient chart and reconcile the clinical data later, select **Finalize File**. See [Continue reconciliation](#).
- To reconcile the clinical data now, select **Finalize & Start Reconciliation**. See [Finalize and start reconciliation](#).

Finalize and start reconciliation

You can begin the reconciliation process by finalizing which problem, allergy, and medication data to merge into the patient chart. The problems, allergies, and medications in the C-CDA file appear below those currently in the patient chart.



The steps below describe the procedure for problem data and also apply to allergies and medications.

1. Select the checkboxes for the problems you want to add to the patient chart.
2. **(Optional)** Select **Preview Finalized Problems** to view the patient's problem list, which includes existing and newly added problems.
3. Select **Confirm** to import the selected problems to the patient chart. You can also select **Confirm** from the **Preview Finalized Problem List** page.

[Back to Clinical Dashboard](#)

Problem

Allergy Complete

Medication

Current Patient Chart - Problem

Problem	Code System	ICD-CM Code	SNOMED	Status	Date Changed	Date Created	Edited By
No results							

C-CDA File - Problem

<input type="checkbox"/>	Problem	Code System	ICD-CM Code	SNOMED	Status	Date Changed	Date Created	Edited By
<input type="checkbox"/>	Acute urticaria	ICD-10		402408009	Active	08/23/2019	01/30/2025	None
<input checked="" type="checkbox"/>	Chronic idiopathic urticaria	ICD-10		302162004	Active	09/09/2019	01/30/2025	None
<input type="checkbox"/>	Idiopathic urticaria	ICD-10		42265009	Active	06/21/2022	01/30/2025	None
<input type="checkbox"/>	Urticaria	ICD-10		126485001	Active	08/19/2020	01/30/2025	None
<input checked="" type="checkbox"/>	Allergy to mold	ICD-10		419474003	Active	07/10/2018	01/30/2025	None
<input checked="" type="checkbox"/>	Allergy to animal dander	ICD-10		232347008	Active	07/10/2018	01/30/2025	None
<input type="checkbox"/>	Mild intermittent asthma	ICD-10		427679007	Active	05/05/2020	01/30/2025	None
<input type="checkbox"/>	Mild persistent asthma	ICD-10		426979002	Active	03/17/2020	01/30/2025	None
<input type="checkbox"/>	History of calculus of kidney	ICD-10		429025008	Active	05/10/2018	01/30/2025	None
<input type="checkbox"/>	Type 2 diabetes mellitus	ICD-10		44054006	Active	10/22/2019	01/30/2025	None

1-10 of 32 items ◀ 1 2 3 4 ▶

By clicking "Confirm", you are merging patient data to your chart. If you miss something, you can reupload the CCD file again and make changes.

[Confirm](#) [Preview Finalized Problems](#)

A success message appears confirming you have finalized reconciliation. All patient data has successfully been merged into the patient chart.

Continue reconciliation

1. On the **Clinical Dashboard**, select **Continue Reconciliation**.

Patient Chart

Patient Summary

Demographics

Appointments

Clinical Dashboard

Documents

Eligibility

Clinical Dashboard

Referral Note ▾
Clinical Summary ▾

Clinical Reconciliation

Date	Problem	Medication	Allergy	Action
01/27/2025	Done	Unfinished	Done	Continue Reconciliation
01/30/2025	Unfinished	Unfinished	Done	Continue Reconciliation

1-2 of 2 items

The problems, allergies, and medications in the C-CDA file appear below the problems, allergies, and medications currently in the patient chart.

The steps below describe the procedure for problem data and also apply to allergies and medications.

2. Continue with step 1 in the finalize and start reconciliation procedure.