

RecordSync

Last modified on 05/07/2025 7:42 pm EDT

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Providers can use **RecordSync** to comprehensively review their patients' 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), a 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 retrieves 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 your practice's organization profile

You must set up your practice's organization profile to use **RecordSync**.

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

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

* Required field

Organization Name *

Blue Sky Medical

Phone Number *

+1 111-111-1234

Address

Street *

123 Main St

City *

Anywhere

State *

California

Zip Code *

90010

Retrieve clinical documents

1. In the **Patient Header**, select **More actions** (three dots) ... and then select **RecordSync**.

Collapse

OnPatient Access

Clinical Decision Support

Apple Health App Data

RecordSync ↗

Customize Patient Header

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.

RecordSync & Consent

Record Locator & Exchange Consent

ON

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

Retrieving document list ...

Searching for documents within Surescripts RLE.

If this is your first time using **RecordSync**, the "Adding Your Organization" message appears. 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 go 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**
As of: 01/06/2025, 8:15 PM

Sharing History
Refresh Records

Filter By
Encounter
Sort By

Title
Enter Search Terms ...

MM/DD/YYYY
MM/DD/YYYY

Start Date
End Date

Newest First

Reset filter

Progress Note
Available

| | | |
|-------------------------|---------------------|--|
| Type | Source | Encounter |
| Progress Note (11506-3) | Get Data From Local | 01/24/2023, 8:00 AM 01/25/2023, 8:00 AM |
| Category | Author | |
| — | — | |

Patient Summary
Reconciled

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

Surescripts Location Summary
Imported
Reconcile

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

Record List actions

| Task | Action |
|---|---------------------------------|
| Open the Sharing History side panel to review a comprehensive record of document requests made for your patient, including the requester and each transaction date. The side panel also shows documents previously retrieved from external practices for continuity of care. In either case, you can view the shared/retrieved document. | 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

1 2 3 4 5

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 it's 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 to view, download, or import. |
| Reconciled | The CCD document data elements have been reconciled into the patient chart. |

RecordSync & Consent



Before turning on **RecordSync** for your practice, be aware that participation in this HIE service requires explicit patient consent. To ensure compliance with federal and state privacy regulations, your practice must include specific language in your patient consent forms authorizing participation in an HIE. Failure to update your consent documentation accordingly may result in noncompliance and prevent the successful use of **RecordSync**. We strongly recommend reviewing your current consent process with your legal or compliance team before activating **RecordSync**.

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

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 |
| dr | 01/27/2025 | C-CDA Import | | surescripts c-cda imported | 01/27/2025 | Fax + Task |
| dr | 01/27/2025 | C-CDA Import | | surescripts c-cda imported | 01/27/2025 | + Task |
| dr | 01/02/2023 | Progress Note | | surescripts | 01/06/2025 | + 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

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

Date Date of document, necessary to put this document in the patient's timeline.

Description Description of document.

Is structured data ☒ 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 ☐ If true, lab has been processed and should not be reprocessed.

Type of document Optional Description of document.

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 following steps describe the procedure for problem data, but 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 CCDA file again and make changes.

[Confirm](#)

[Preview Finalized Problems](#)

A success message appears confirming you have finalized reconciliation. All patient data has been successfully 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 following steps describe the procedure for problem data, and also apply to allergies and medications.

- Continue with [step 1 in the finalize and start reconciliation procedure](#).