

Set Up RecordSync

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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

