Set Up RecordSync

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Set up permissions

Providers and staff need the **Access RecordSync** permission to use RecordSync. Turn it on for each person on your team who uses it.

1. Select **Account** > **Practice Management** > **General Management** > **Providers** or **Staff**.
2. Select **View** and scroll down to the **Permissions** section.
3. Select **Edit** to open the **Edit Role & Permissions** side panel.
4. Turning the **Access RecordSync** toggle switch on, and select **Save Changes**.

Set up your practice group's organization profile

RecordSync uses your organization profile to verify your practice group with Surescripts. Your organization profile needs your practice group's **organizational NPI (Type 2)**, not an individual provider's NPI.

A Type 2 NPI is linked to your organization's employer identification number (EIN), the federal tax ID number the IRS assigns to your business. A Type 1 NPI is linked to an individual provider.

> This setting applies to your practice group, not an individual provider. A common setup mistake is entering a provider's individual NPI here.

1. Select **Account** > **Organization Profile**.
2. Review the information in the text boxes. DrChrono fills them in from these sources:
   - **Organization name: Account** > **Account Settings** > **Medical Billing** > **Practice Official Name**
   - **Phone number and address: Account** > **Practice Management** > **General Management** > **Offices**
   - **Organization NPI: Account** > **Account Settings** > **Medical Billing** > **Billing NPI**
3. Confirm the **Organization NPI** is your practice group's Type 2 NPI. If your billing NPI is a provider's individual NPI, replace it with your organization's Type 2 NPI.

   > Not sure which type your NPI is? Search for it in the NPPES NPI Registry. The results show whether each NPI belongs to an individual or an organization.

4. Select **Save**.

DrChrono checks that the NPI is active and valid, then shares it with Surescripts to verify your organization. Entering the correct Type 2 NPI helps speed up RecordSync enablement.

