Set Up RecordSync

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Set up permissions | Set up your practice group's organization profile

Set up permissions

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

- 1. Select Account > Staff Permissions > Providers or Staff tab.
- 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 group's organization profile

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



This setting applies to a practice group, not an individual provider.

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

Organization NPI

This number is important for **RecordSync** and is required. When available, it will automatically pre-fill with your **Billing NPI**. If not, you'll need to enter it manually. The system will validate the number to ensure it's active and valid.

Keeping this information up to date ensures that **Surescripts** has the correct address and Organization NPI on file.

2. Select Save.

