Set Up RecordSync

Last modified on 09/03/2025 4:02 pm EDT

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Set up permissions

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

1. Select **Account** > **Staff Permissions**.
2. For a staff member, select the **Staff** tab.
3. Select **View** (for a specific provider or staff member).

   The permissions window opens.
3. Select **Edit Permissions**.
4. Select the **Access RecordSync** checkbox and then select **Save Permissions**.

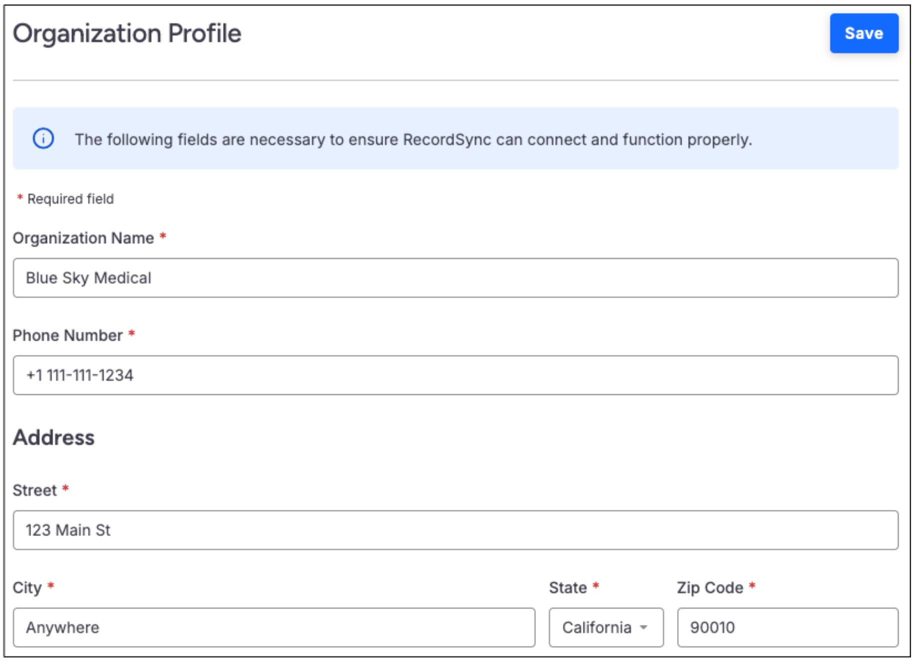
Set up your practice group's organization profile

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**
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