## Set Up RecordSync

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## Set up permissions Set up your practice's organization profile

## 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 * State * Zip Code *
Anywhere California - 90010