

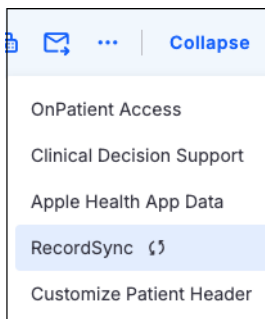
# Retrieve Clinical Documents with RecordSync

Last modified on 04/16/2026 11:22 am EDT



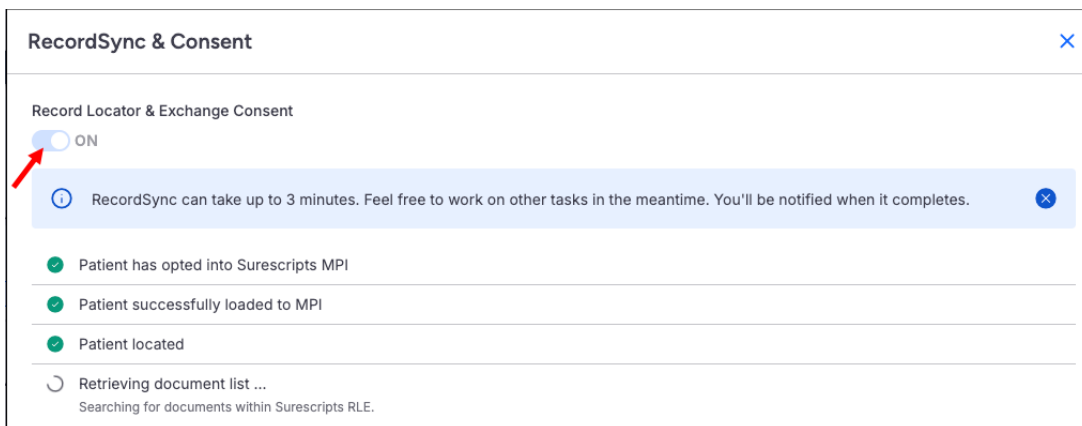
Before turning on **RecordSync** for your practice, be aware that participation in this health information exchange (HIE) service requires explicit patient consent. To ensure compliance with federal and state privacy regulations, your practice must include specific language in your patient consent forms authorizing participation in an HIE. Failure to update your consent documentation accordingly may result in noncompliance and prevent the successful use of **RecordSync**. We strongly recommend reviewing your current consent process with your legal or compliance team before activating **RecordSync**.

1. In the **Patient Header**, select **More actions** (three dots) **...** and select **RecordSync**.



The **RecordSync & Consent** side panel opens. Once you turn on consent, **RecordSync** starts gathering patient information, which may take several minutes. While the search is in progress, you can close the side panel and continue working on other tasks. A message appears in the lower left corner once the process is complete.

2. Turn the **Record Locator & Exchange Consent** toggle switch on.



If this is your first time using **RecordSync**, the "Adding Your Organization" message appears. When the search is successful, the results appear in the **Record List**.



Perform all actions within the side panel. Select a breadcrumb link (top left corner) to go to a previous side panel.

## RecordSync & Consent actions

You can perform the following actions on the RecordSync & Consent side panel:

- Turn **RecordSync** consent on or off
- Manually refresh the **Record List**
- View the **Record List**

**RecordSync & Consent** ✕

Record Locator & Exchange Consent

ON

Last Modified By: staffmember on 01/06/2025, 8:15 PM

ℹ RecordSync can take up to 3 minutes. Feel free to work on other tasks in the meantime. You'll be notified when it completes. ✕

- ✔ Patient has opted into Surescripts MPI
- ✔ Patient successfully loaded to MPI
- ✔ Patient located
- ✔ Document list retrieved

[Refresh Records](#) [View Records](#)

## Record List

- The **Record List** side panel has multiple filters, search, and sort options.
- Once records are queried, they are stored for 30 days.
- A new query is automatically triggered after 30 days or upon manual refresh (select **Refresh Records**).

RecordSync & Consent / ×

## Record List

Document Search has returned **22 results** [Sharing History](#) [Refresh Records](#)

As of: 01/06/2025, 8:15 PM

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Filter By Encounter Sort By

**Title**  MM/DD/YYYY  MM/DD/YYYY  Newest First

Start Date End Date

[Reset filter](#)

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**Progress Note** Available

Type	Source	Encounter
Progress Note (11506-3)		01/24/2023, 8:00 AM 01/25/2023, 8:00 AM
Category	Author	
—	—	

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**Patient Summary** Reconciled

Type	Source	Encounter
Clinical Document (81214-9)	My Clinic1737669788.834864	— —
Category	Author	
Clinical Document (81214-9)	—	

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**Surescripts Location Summary** Imported [Reconcile](#)

Type	Source	Encounter
Location Summary (34133-9)	Surescripts	— —
Category	Author	
Location Summary (34133-9)	—	

## Record List actions

Task	Action
Open the <b>Sharing History</b> side panel to view a history of the document requests made for your patient.	Select <b>Sharing History</b> .
Open the document from within the <b>Sharing History</b> side panel.	Select <b>View Document</b> .
Manually refresh the <b>Record List</b> page.	Select <b>Refresh Records</b> .
Open the document.	Select <b>View Document</b> .
Import a document.	Select <b>Import Document</b> .
Import a document from within the document.	Select <b>Import</b> .
Reconcile a document.	Select <b>Reconcile</b> .

## View requested records in Sharing History

Open the **Sharing History** side panel to view a history of all previously requested records for your patient, including the requester and each transaction date. The side panel also shows documents previously retrieved from external practices for continuity of care.

You can view the shared/retrieved document by selecting **View Document**.

RecordSync & Consent / Record List / Sharing History

Requested By	Date	Action
Memorial Hospital	07/14/24 at 10:20 a.m.	<a href="#">View Document</a>
Memorial Hospital	06/15/24 at 1:55 p.m.	<a href="#">View Document</a>
Memorial Hospital	06/15/24 at 2:12 p.m.	<a href="#">View Document</a>
Memorial Hospital	05/27/24 at 4:11 p.m.	<a href="#">View Document</a>
Forest Hills Hospital	05/22/24 at 7:44 a.m.	<a href="#">View Document</a>
Metro-General Hospital	05/05/24 at 12:20 p.m.	<a href="#">View Document</a>
Ravencroft Institute	04/09/24 at 3:32 p.m.	<a href="#">View Document</a>
Ravencroft Institute	04/02/24 at 8:14 a.m.	<a href="#">View Document</a>
Ravencroft Institute	03/29/24 at 10:15 a.m.	<a href="#">View Document</a>

1 - 10 of 42 records

## Document statuses

Status	Description
Available	The document hasn't been retrieved from the external organization.
Error	The document has an issue
Importing	Actively importing the document to start the reconciliation process.
Imported	The document is waiting in the reconciliation queue. If it's not a CCD, it has been imported into the patient's chart in <b>Documents</b> . Select <b>Reconcile</b> to continue the reconciliation process.
Retrieving	Actively retrieving the document from the external organization.
Retrieved	The document has been retrieved and is available for viewing, downloading, or importing.
Reconciled	The CCD document data elements have been reconciled into the patient chart.

## Imported clinical documents

Imported clinical documents are uploaded to the patient chart (**Documents > Uploaded Documents**).

Uploaded Documents

	Date	Description	Additional URL	Document Tags	Uploaded on	Actions
	01/27/2025	C-CDA Import		<a href="#">surescripts</a> <a href="#">c-cda</a> <a href="#">imported</a>	01/27/2025	<a href="#">Fax</a> <a href="#">+ Task</a> <a href="#">✎</a> <a href="#">✖</a>
	01/27/2025	C-CDA Import		<a href="#">surescripts</a> <a href="#">c-cda</a> <a href="#">imported</a>	01/27/2025	<a href="#">🔔</a> <a href="#">+ Task</a> <a href="#">✎</a> <a href="#">✖</a>
	01/02/2023	Progress Note		<a href="#">surescripts</a>	01/06/2025	<a href="#">🔔</a> <a href="#">+ Task</a> <a href="#">✎</a> <a href="#">✖</a>