

Getting Started

Last Modified on 05/30/2025 2:49 pm EDT

Record Locator Setup Checklist:

- **Required: Set up 'Record Locator Consent' Usage Checkbox** - This setup item exists within Setup > Patients > Gear > Setup > Miscellaneous > 'Record Locator Consent' and typically requires an Practice Admin to modify depending on existing role configurations.
- **Required: Set up Role 'Surescripts Record Locator'** - This role allows users to see/use the Surescripts Record Locator chart tab.
- **Optional: RLE Consent Template Letter** - Set up the RLE consent checkbox associated with signing the letter for intakes that have a letter setup.
- **Required: Chart Tabs Favorites Setup** - Surescripts Record Locator must be added to your Setup Favorites for it to be displayed within your Chart Tabs.

Record Locator Consent Setup

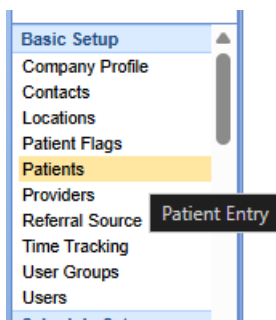
You must first enable the Record Locator Consent > **Usage** in order for the functionality to be available to your practice database.

Required Patient Miscellaneous Configuration: Usage Checkbox needs to be selected.

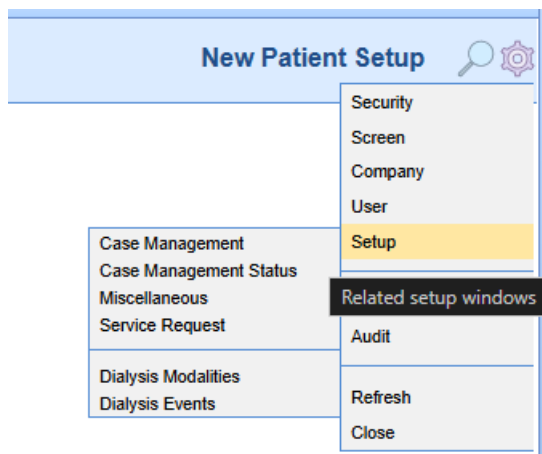
1. Click on the **Setup** portal.



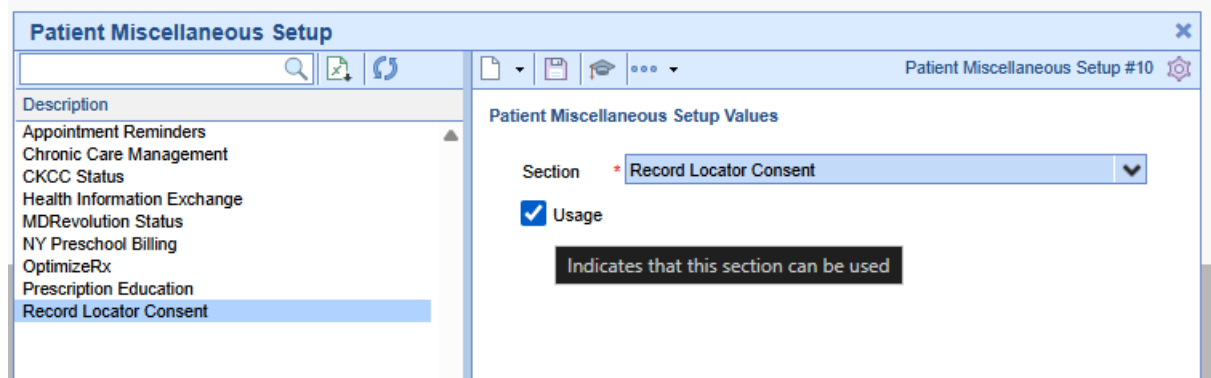
2. Select **Patients**



3. Click the **Gear Icon** in the top right next to the search field
4. Select **Setup > Miscellaneous**



- Find the item titled '**Record Locator Consent**' and select the "Usage" checkbox



- Click **Save**

Surescripts Record Locator Role Setup

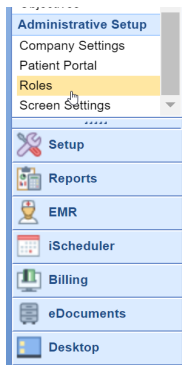
You must turn on the Surescripts Record Locator role to use RecordSync:

Required Role: *Surescripts Record Locator* - this general role provides users access to see/use the Surescripts Record Locator chart tab.

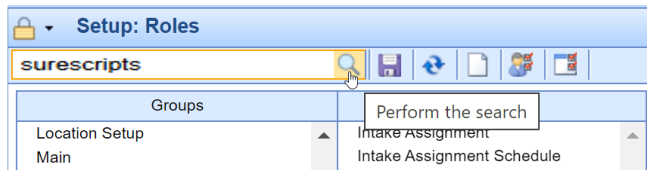
- Click on the **Setup** portal.



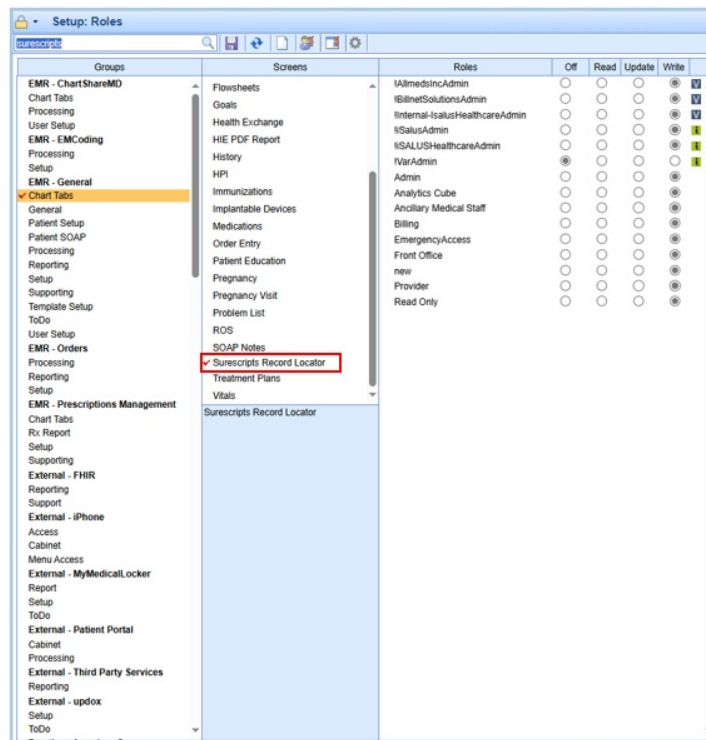
- Select **Roles** under Administrative Setup.



3. Type Intake Assignment into the search box and hit the **Magnifying Glass** button.



4. The **Surescripts Record Locator** role should return and then be selected. Assign **Write** access to the appropriate roles.



5. Press the **Save** button to save your changes

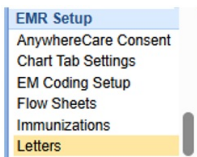
Intelligent Intake Consent & Letter Setup

Optional RLE Consent Letter Template: You may select the letter template for **RLE Consent** for the consent signature field or set up the RLE consent checkbox associated with signing the letter for intakes that have a letter setup (the patient signature quick pick should be on the letter).

1. Click on the **Setup** portal.



2. Select **Letters** under EMR Setup.



3. Select the **RLE Consent** Letter Template, click Advanced, and check the "**Populate RLE Consent**" box.

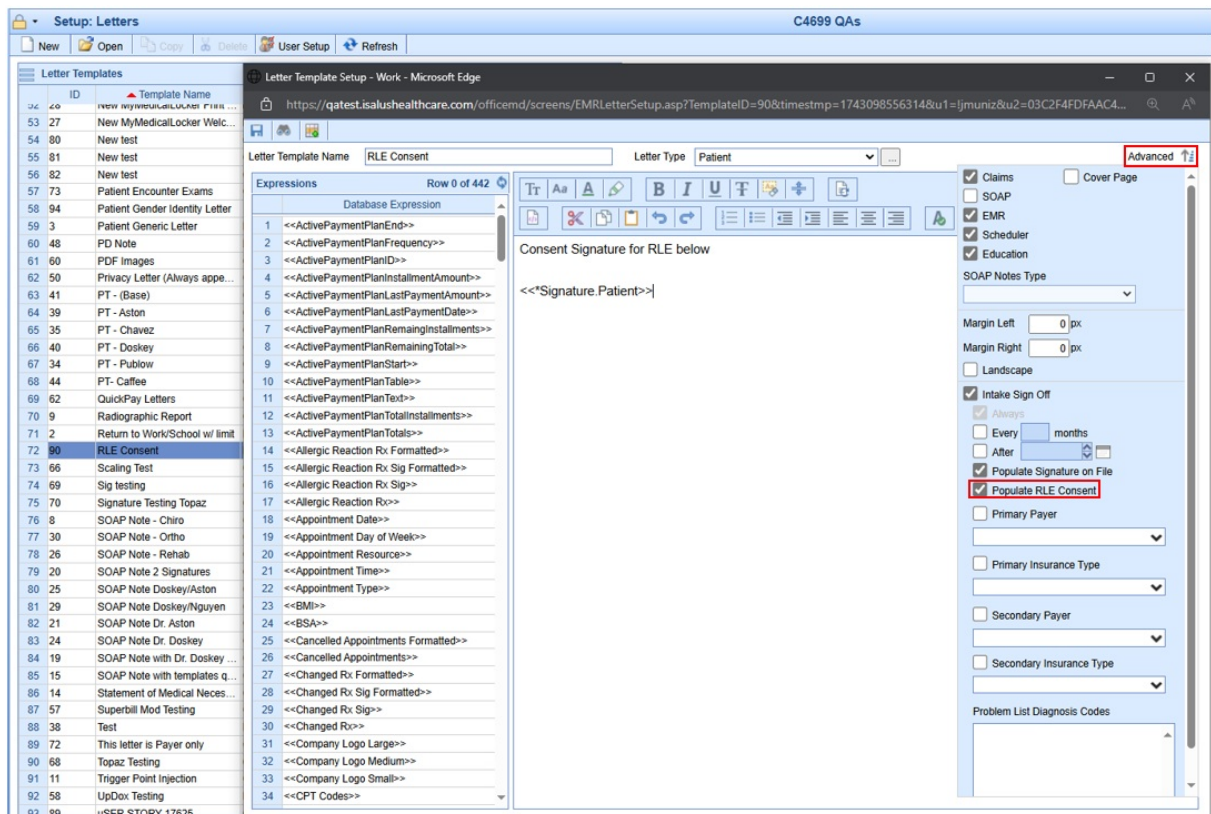
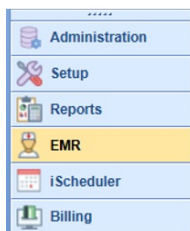


Chart Tab Favorites Setup

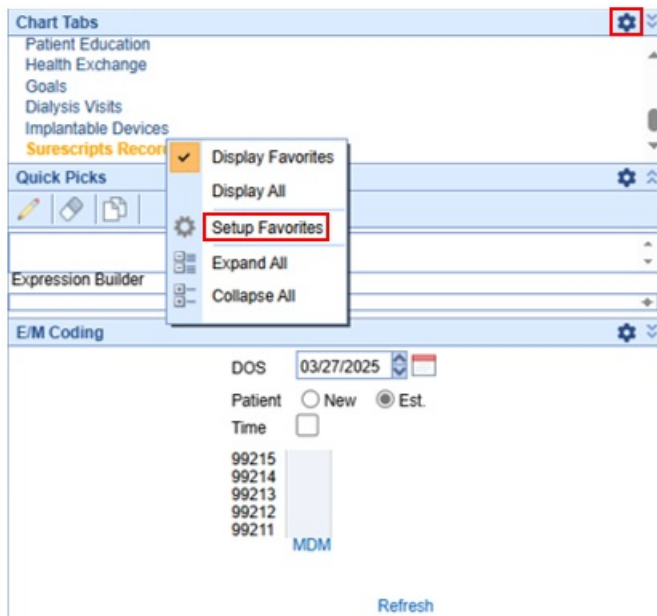
Once you've added the Surescripts Record Locator role, you must include it in your Chart Tabs Setup Favorites to display it within your chart tabs.

Note: Until you add the Surescripts Record Locator to your Setup Favorites, it will not be visible within your Chart Tabs.

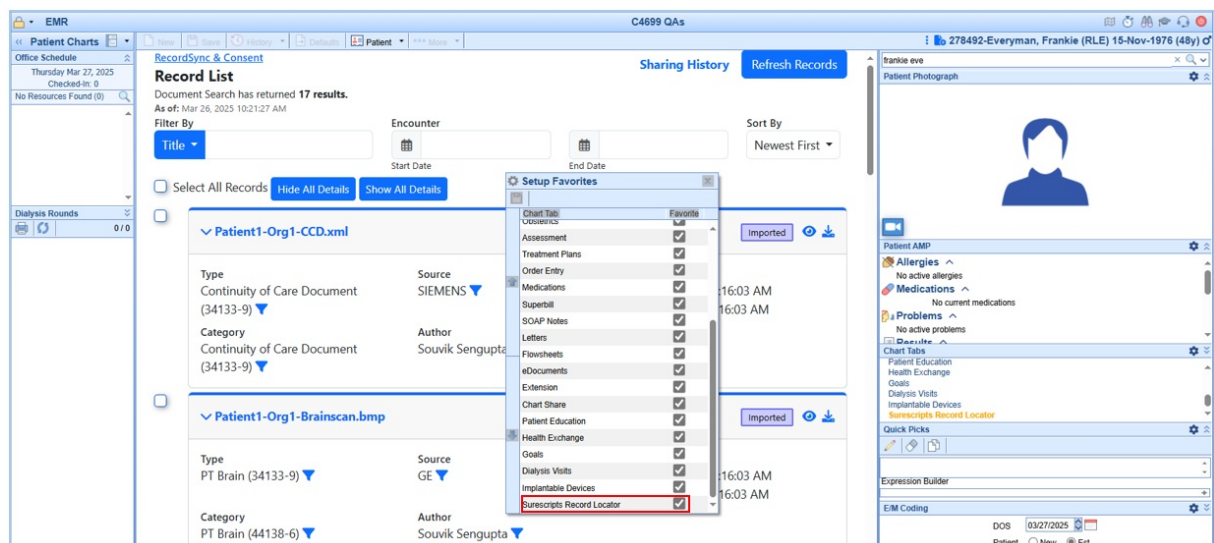
1. Click on the **EMR** portal.



2. Select your patient and access the Chart Tabs Setup Favorites option.



3. Add the Surescripts Record Locator to the setup favorites by checking the corresponding box.



4. Click Save.

Setup Favorites

Chart Tab	Favorite
Obstetrics	
Assessment	<input checked="" type="checkbox"/>
Treatment Plans	<input checked="" type="checkbox"/>
Order Entry	<input checked="" type="checkbox"/>
Medications	<input checked="" type="checkbox"/>
Superbill	<input checked="" type="checkbox"/>
SOAP Notes	<input checked="" type="checkbox"/>
Letters	<input checked="" type="checkbox"/>
Flowsheets	<input checked="" type="checkbox"/>
eDocuments	<input checked="" type="checkbox"/>
Extension	<input checked="" type="checkbox"/>
Chart Share	<input checked="" type="checkbox"/>
Patient Education	<input checked="" type="checkbox"/>
Health Exchange	<input checked="" type="checkbox"/>
Goals	<input checked="" type="checkbox"/>
Dialysis Visits	<input checked="" type="checkbox"/>
Implantable Devices	<input checked="" type="checkbox"/>
Surescripts Record Locator	<input checked="" type="checkbox"/>