Retrieving documents using RecordSync

Last Modified on 04/02/2025 11:04 am EDT

1. Once in a patient's chart, select the Surescripts Record Locator chart tab.

Chart Tabs	\$
Patient Education	
Health Exchange	
Dialysis Visits	
Implantable Devices	
Surescripts Record Locator	*
Quick Picks Surescripts Record Locator	\$ \$

2. Based on your office SOP, you must ensure the RecordSync & Consent for Surescripts has been provided (opted in) by the patient and the **Record Locator & Exchange Consent** toggle switched to the **ON** position.

EMR	C4699 QAs	回 🖱 🏟 🎓	00
« Patient Charts 🗄 •	New Cave & Hotaly - Distance Patient More -	: 🌓 278517-Olson, Theresa 12-Jun-1928	(96y) 🖓
Office Schedule 🔗	Record Locator & Exchange Consent	theresa olson	×Qv
Thursday Mar 27, 2025 Checked In 0		Patient Photograph	\$ ≈
No Resources Found (0)	Last Modified By: ??? on ???		
· ·	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 opted into Surescripts MPI		
Dialysis Rounds S 0/0	Coading patient into MPL Sending patient demographics to Surescripts	Patient AMP	¢ a
	O Existing Document Check	Allergies ^ No active allergies	î
	O Patient Search	No current medications	ľ
	O Document Search	No active problems	-
		Chart radio Patient Education Health Exchange Goals Dialysis Visits Implematable Devices Surrescripts Record Locator	
		Quick Picks	\$ *
		Expression Builder	:
		E/M Coding	\$
		DOG 04272025 0 Patient @ New 0 Est. Time 1 92234 1 9224 1 9224 1 9224 1 9224 1 9224 1 9224 1 92224 1 9224 1 924	
		Refresh	

atient Setup	New Save Train More			Everyman, Frankle (RLE) Born 11/15/1976(48y) Gender Male				
\bigcirc	Consent	Unknown	Granted	ODenied				
	Effective Date	#						
	✓ MDRevolution St	atus						
Summary	CCM Status	Unknown	O Enrolled	ODisenrolled	Opted-Out			
emographics	CCM Date							
Insurance sponsible Party	RPM Status	OUnknown	C Enrolled	ODisenrolled	Opted-Out			
ergency Contact Comments	RPM Date	m						
se Management Dialvsis	✓ CKCC Status							
L Self Schedule	CCM Status	OUnknown	O Enrolled	ODisenrolled	Opted-Out	ODeceased		
Sliding Fee mun. Registry	CCM Date							
tient Extension	✓ Record Locator (Consent						
ferral Tracking	Consent Given	R 19. 2	125 12-54-20	AM				
	Sunc Status	Sunc not a	at attempte	d				

3. Search for documents by filtering by Title, Type, Category, Source, or Author. You can also filter by Encounter Start and End Date. You can also sort by Newest First, Oldest First, Type, Category, Source, Author, and Title. Once records are retrieved, they are kept for a period of 30 days. A new search is automatically initiated after 30 days or when the user manually refreshes the records (by selecting the "Refresh Records" option).



A list of documents based on your search filters will be available. These documents will be in one of the following statuses:

Status	Description
Available	The document is available but hasn't been retrieved from the external organization.
Retrieving	Actively retrieving the document from the external organization.
Retrieved	The document has been retrieved and is available for viewing or import.
Imported	The document is waiting in the reconciliation queue (If not a CCD, it is imported as an eDocument.
Error	The document cannot be retrieved (incomplete encounter/record) or source system is unable to respond.

4. Most files will be CCDA files. Please note that if the file is not a CCDA file, the "Save As eDocument" screen will prompt you to select how and where to save the file (same workflow as with other eDocuments).

🔒 • EMR			C4699 QAs	
« Patient Charts 📄 🔹 🗋 Ne	w 🖹 Save 🕄 History 🔹 🖻 Defaults 🔛 Patient 🔹	*** More *		
Office Schedule	cordSync & Consent		Sharing Histor	v Refresh Records
Thursday Mar 27, 2025	ecord List		Sharing Histor	y Refresh Records
No Resources Found (0) Q Do	cument Search has returned 91 results.			
As	of: Mar 25, 2025 6:06:27 AM			
Filt	ter By	Encounter		Sort By
Т	itle 👻	#	#	Newest First 🔻
		Start Date	End Date	
, O	Select All Records Hide All Details Show All	Details		
Dialysis Rounds Dialysis Rounds O/0 O/0 Dialysis Rounds O/0 O/0 O/0 O/0 O/0 O/0 O/0 O/	✓ PatientCCDA.xml			Available 🥑 🛓
	-		-	
	Type Continuity of Caro Document (24122	CM Staging Test Assount	Encounter	
	Continuity of Care Document (34133-	Cvv staging lest Account		
	9) 🔻			
	Category	Author		
0	✓ PatientCCDA.xml			Available 🥑 🛓
	Type	Source	Encounter	
	Continuity of Care Document (34133-	CW Staging Test Account	Encounter	
		err staging reserveedant (
	5)			
	Category	Author		
0	✓ PatientCCDA.xml			Imported 🥑 🛓
	Type Continuity of Care Document (34133- 9) ▼	Source Included Health 💙	Encounter	
	Category	Author		

5. To view the file, select the view icon and wait for the document to load.

✓ PatientCCDA.xml			Available 🧿 🛓
Type Continuity of Care Document (34133- 9) ▼	Source CW Staging Test Account T	Encounter	
Category	Author		

6. To import the file, select the Import CCD icon and wait for the status to change to imported.

✓ PatientCCDA.xml			Imported 🛛 🕹
Type Continuity of Care Document (34133- 9) ▼	Source CW Staging Test Account T	Encounter	
Category	Author		

Please be aware that after importing the documents, there is no automatic reconciliation process. The documents are added to the reconciliation queue in the Summary chart tab, but they still need to be manually merged/reconciled via the normal reconciliation process.