RecordSync | Record Locator & Exchange

Last Modified on 07/03/2025 11:36 am EDT

**

Overview of RecordSync

RecordSync is a bi-directional document exchange feature that leverages the Surescripts Record Locator & Exchange network to access documents from connected health systems through a national health data exchange framework called Carequality. This feature removes barriers for specialists looking for medical records related to visits outside their organization, allowing them to review their patient's clinical history, including previous encounters, lab results, diagnoses, allergies, immunizations, medications, and other treatments, by querying trusted data sources across different healthcare systems and pulling the relevant records into OfficeEMR.

Simultaneously, it allows outside providers working with your patients to retrieve pertinent data related to visits within your clinic (as long as they are also using Carequality) by using the HL7® FHIR® standard transactions employed by RecordSync. This integration also allows practices to attest to the Merit-based Incentive Payment System (MIPS) Promoting Interoperability (PI) performance category for the Health Information Exchange (HIE) requirement by taking part in the RecordSync bi-directional exchange.

Key Features

- Retrieve outside records from members of CareQuality & Surescripts Record Locator & Exchange national HIE network
- Import & Reconcile CCDs reducing the burden of Allergies, Medications, and Problem management
- Save PDFs, and other documents to the patients eDocuments and assign them for review
- Share CCDs with other participants automatically (patient must be consented) & view the records shared in the Sharing History



Getting Started

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: Consent Letter for Intake** Set up the 'Populate RLE Consent' checkbox to automate patient consent in conjunction with Intelligent Intake. Typically this would be your Privacy Practices or Information Sharing Policy, this is unique to your practice.
- **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

Basic Setup		
Company Profile		
Contacts		
Locations		
Patient Flags		
Patients		
Providers		
Referral Source	Patient Er	ntry
Time Tracking		
User Groups		
Users		
Coloridades Coloridades		

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



5. Find the item titled 'Record Locator Consent' and select the "Usage" checkbox



6. 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.

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

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Reports	U
🐣 EMR	

2. Select Roles under Administrative Setup.

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Administrative Setup					
Company Settings					
Patient Portal					
Roles					
Screen Settings	-				
🧏 Setup					
Reports					
💆 EMR					
iScheduler					
😃 Billing					
eDocuments					
Desktop					

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

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	Groups			Perform the search		
	Location Setup Main	•	lı lı	ntake Assignment ntake Assignment Schedule	•	

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 Populate RLE Consent Checkbox: You may select one of your existing letter templates or create a new letter to obtain consent for requesting and sharing the patient's data with the RecordSync integration. This is most commonly your existing Privacy Practice or Information Sharing Policy.

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



2. Select Letters under EMR Setup.



 Select a Letter Template you would like to use for capturing consent, click Advanced, and check the "Populate RLE Consent" box. This letter is typically your Privacy Practices / Information Sharing Policy



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.

Administration
🎇 Setup
Reports
💆 EMR
iScheduler
🏥 Billing

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

Chart Tabs		\$
Patient Education		
Health Exchange		
Goals		
Dialysis Visits		
Implantable Devices		
Surescripts Recon	 Display Favorites 	
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	Refresh	

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

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4. Click Save.



Retrieving documents using RecordSync

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



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.

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Office Schedule Thursday Mar 27, 2025 Checked-In: 0 No Resources Found (0)	Record Locator & Exchange Consent	theresa olson Patient Photograph	× Q, v Ø #
ŕ	RecordSync can take up to 3 minutes. Feel free to work on other tasks in the meantime. You'll be notified when it completes.		
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	O Patient Search	No current medications	ľ
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Tip: You can also provide Record Locator Consent from the **Patient Setup** > **Miscellaneous** screen.

	Consent	O Unknown O	Granted O Denied	Ł		
	Effective Date	#				
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Demographics	CCM Date	m				
Insurance Responsible Party	RPM Status	O Unknown O	Enrolled ODisen	olled Opted-Out		
mergency Contact	RPM Date	#				
Comments						
ase Management Dialysis	✓ CKCC Status					
ML Self Schedule	CCM Status	O Unknown O	Enrolled ODisen	olled Opted-Out	ODeceased	
Sliding Fee Immun. Registry	CCM Date					
Patient Extension Miscellaneous	✓ Record Locator (Consent				
Referral Tracking	Consent Given	9				
	Start Date	Mar 19, 2025	12:54:30 AM			
	Sync Status	Sync not yet	attempted			

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).

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Patient Charts 📘 🔹		History * 🕒 Defaults 🛃 Patient * •	** More *		
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Thursday Mar 27, 2025 Checked-In: 0	Record List			Sharing History	Refresh Records
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	C		Author		ridition
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		(0)11053(0)225)			
	∨ Patie	ntCCDA.xml			Available 🥝 📩
	Type		Source	Encounter	
	Type		Source	Lincounter	

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).

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	Filter By		Encounter			Sort By	
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		Continuity of Care Document (34133-	CW Staging Test Account				
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		Type Continuity of Care Document (34133- 9) V	Source Included Health T		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 💙	Encounter	
Category	Author		

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

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Type Continuity of Care Document (34133- 9) ▼	Source CW Staging Test Account 💙	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.

Merging CCDs with RecordSync & the Reconciliation screen

Please note that if a document is not a CCD, it will be imported as an eDocument. For more information on importing non-CCD documents into eDocuments, please refer to our **Indexing and Tasking** eDocuments article.

Follow these steps to Merge/Reconcile CCDs:

1. Once the CCD documents have been imported, open the patient's chart in the EMR (ensure you are on the Timeline Summary screen).

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No Resources Found (0)	No active allergies			No cu	irrent medicatio	ons			P.	lo active proble	ems					
Dialveis Rounds																
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					Decision	Support In	tervention	Messages	s						No active allergies	
	The U.S. Preventive Services Tas	k Force (USPSTI	-) recommend	s screening for	high blood pre	issure in									No current medications	
	adults age 18 years and older.														Problems A	
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	Telehealth														99213 99212	
	Authorizations														99211 MDM	
	(internet to the second	4												÷	Refresh	

2. Click the Patient Reconciliation (clipboard icon).

Telehealth
Authorizations
e

 From this screen, you can work your reconciliation process in the same manner as you would with Allergens, Medications, Problems, and other categories. You can then set the corresponding statuses in the Action column.

Action	Allergen	Reactions	Date	Source	
	Acesulfame		01/16/2025	Intake Form	
Ignore	Ree Pollen		01/16/2025	Intake Form	
Ignore	grass pollen		01/16/2025	Intake Form	
Ignore	Jatav Natural Dubbar		01/10/2025	Intake Form	
ignore	Latex, Natural Rubber		01/10/2025	Intake Form	
ignore	Magnesium Oxide		01/16/2025	Intake Form	
Ignore	Rash Relief Antifungal		01/16/2025	Intake Form	
Кеер	Acesulfame	Ultran	05/20/2017	Patient Chart	
Кеер	drass pollen	rash	03/04/2017	Patient Chart	
Keen	Latev Natural Rubber	rasii	05/20/2017	Patient Chart	
Keep	Magnesium Oxide		08/13/2019	Patient Chart	
Кеер	No Known Drug Allergies		03/02/2025	Patient Chart	
Кеер	Rash Relief Antifungal		05/20/2017	Patient Chart	
Action	Medication		Date	Source	
Ignore	Levoxyl 125 mcg tablet		01/16/2025	Intake Form	
Ignore	Lexapro 10 mg tablet		01/16/2025	Intake Form	
Ignore	Wellness Protein 16 gram-90	kcal/60 mL oral liquid	01/16/2025	Intake Form	
Кеер	Advil Cold and Sinus 30 mg-2	00 mg tablet 1 TABLET OR	. 03/02/2025	Patient Chart	
Кеер	Levoxyl 125 mcg tablet 1 TAB	LET ORAL Every Day	11/14/2024	Patient Chart	
Кеер	Lexapro 10 mg tablet 1 TABLE	ET ORAL Every Day	06/20/2024	Patient Chart	
Кеер	Wellness Protein 16 gram-90	kcal/60 mL oral liquid 2 LIQ	. 06/20/2024	Patient Chart	
Action	Problem		Date	Source	
Кеер	Abrasion of right ear		03/01/2025 - 03/02/202	5 Patient Chart	
Кеер	Chronic kidney disease, stage	5	07/06/2023	Patient Chart	
Кеер	Essential (primary) hypertensi	on	12/14/2021	Patient Chart	
Кеер	Pneumonia due to SARS-asso	ociated coronavirus	12/15/2023	Patient Chart	
	Immunization		Date Source	`	

Viewing requested records in Sharing History

You can review all the previously requested documents or records by navigating to the Sharing History tab.

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

Chart Tabs	\$
Patient Education	
Health Exchange	
Goals	
Dialysis Visits	
Implantable Devices	
Surescripts Record Locator	*
Quick Picks	\$ \$
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2. Search for documents using the available filters.

🔒 • EMR			C4699 QAs	
« Patient Charts 📄 🔹	🗋 New 🖺 Save 🖏 History 🔹 🗗 Defaults 🔛 Patient	t 🔻 👓 More 🔻		
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Thursday Mar 27, 2025 Checked-In: 0	Record List		Sharing	Refresh Records
No Resources Found (0)	Document Search has returned 91 results.			
	As of: Mar 25, 2025 6:06:27 AM			
	Filter By	Encounter		Sort By
	Title 👻	#	#	Newest First 🔻
		Start Date	End Date	

3. Click Sharing History.

C4699 QAs			
	Sharing History	Refresh Records	^
	Sharing History	Refresh Records	
	:	Sort By	
 		Newest First 🝷	
End Date			

4. An audit history of all the previously requested records is available with the requester, the date, and a link to view the document.

Requested By	Date	Action
McKesson, Ontada	03/27/2025 1:31:37 AM	View Document
McKesson, Ontada	03/26/2025 10:25:19 AM	View Document
McKesson, Ontada	03/25/2025 11:42:10 PM	View Document
McKesson, Ontada	03/25/2025 2:28:24 PM	View Document
McKesson, Ontada	03/24/2025 4:27:03 PM	View Document
Neighborhood Physicians Practice	03/20/2025 6:42:16 PM	View Document
Neighborhood Physicians Practice	03/20/2025 6:41:16 PM	View Document
Neighborhood Physicians Practice	03/20/2025 6:37:53 PM	View Document
leighborhood Physicians Practice	03/20/2025 4:51:57 PM	View Document
Z-QAMASTER-5950	03/20/2025 4:21:43 PM	View Document
MDS Aprima 19.4	03/20/2025 4:14:12 PM	View Document
MDS Aprima 19.4	03/20/2025 3:46:27 PM	View Document
est 2 org name anton	03/19/2025 6:14:42 PM	View Document

MIPS Reporting & RecordSync

Eligible clinicians can attest to the Health Information Exchange (HIE) requirement of the MIPS Promoting Interoperability (PI) performance category by participating in the RecordSync bi-directional exchange.

TIP: If you do not see **HIE Bi-Directional Exchange** in the Promoting Interoperability section, it is due to your existing setup for the selected group/provider. This can be changed by using the edit menu and changing the dropdown value for the **HIE** field:

MIPS Dashboard		
恩 PROVIDERS Reporting Year 202	Contraction Contra	Edit Provider ×
Individual Cohen M.D., Sandra	01/01/2025 12/31/2025	Provider Cohen M.D., Sandra Q. Pl: 116
Group 999999999	01/01/2025 12/31/2025	Reporting Period Full Year Start 01/01/2025 End 12/31/2025
Tighes MD, Fallor	0110112023 1213112023	TIN 123456789
		Quality Reporting
		HIE • HIE Bi-Directional Exchange Measur V
		Save X Cancel

PROMOTING INTEROPERABILITY

ONC 2015 Edition	Cures	Update	EHR:	for	2025	reporting	year
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Measure	Performance Ra	Score			
Safety Assurance Factors for EHR Resilience (SAFER) Assessment*	Attest: No	0%			
Security Risk Analysis*	Attest: No	0%			
e-Prescribing*	0/0	0%	0 / 10		
Query of the PDMP*	Attest: No	0%	0 / 10		
Provide Patients Electronic Access to their Health information*	0/0	0%	0 / 25		
HIE Bi-Directional Exchange*	Attest: No	0%	0 / 30		
Public Health and Clinical Data Exchange*	0/2	0%	0 / 25		
Total Score:					
Promo	ting Interoperabilit	y Score:	0 / 25		

* Indicates Required Measure to earn any points in the Promoting Interoperability Category

Scoring

Required to Attest YES for Promoting Interoperability Performance Category Score if submitting as an alternative to the Support Electronic Referral Loops by Sending Health Information and the Support Electronic

Referral Loops by Receiving and Reconciling measures or an alternative to the Enabling Exchange Under TEFCA measure. This will give the provider 30 points to his/her score.

Exclusion

N/A

Measurement

The MIPS-eligible clinician or group must attest that they engage in bidirectional exchange with an HIE to support transitions of care.

Implementation

The MIPS-eligible clinician must attest YES to the following:

- I participate in an HIE in order to enable secure, bi-directional exchange to occur for every patient encounter, transition or referral, and record stored or maintained in the EHR during the performance period in accordance with applicable law and policy.
- The HIE that I participate in is capable of exchanging information across a broad network of unaffiliated exchange partners including those using disparate EHRs, and does not engage in exclusionary behavior when determining exchange partners.
- I use the functions of CEHRT to support bi-directional exchange with an HIE.

Indexing & Tasking eDocuments

Most files available within the Surescripts Record Locator will be CCDA files. Please note that if a 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)

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

Chart Tabs	\$ \$
Patient Education	
Health Exchange	î
Goals	
Dialysis Visits	
Implantable Devices	
Surescripts Record Locator	-
Quick Picks	\$ ≎
Surescripts Record Locator	

 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).

K Patient Charts Image: Consent Image: Consent Sharing History Ref Office Schedule Record List Sharing History Ref Image: Consent Record List Sharing History Ref No Resources Found (o) Documents Feature 91 results. As of: Mar 25, 2025 606:27 AM Sort By Filter By Encounter Image: Consent Nervee Start Date Image: Consent Amarge Image: Consent Amarge Nervee Object Schedule Consent Schedule Sort By Nervee Ititle Image: Consent Amarge Image: Consent Amarge Nervee Ititle Image: Consent Amarge Image: Consent Amarge Nervee Ititle Image: Consent Amarge Image: Consent Amarge Nervee Image: Consent Amarge Image: Consent Amarge Image: Consent Amarge Nervee Image: Consent Amarge Image: Consent Amarge Image: Consent Amarge Nervee Image: Consent Amarge Image: Consent Amarge Image: Consent Amarge Nervee Image: Consent Amarge Image: Consent Amarge Image: Consent Amarge Nervee Image: C	e <mark>fresh Records</mark> Ĵ <u>}v</u> vest First ▼
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3. To import the file, select the **Import icon** on the top right of the document tab.

∨ PatientCCDA.xml			Imported 🥥 🛓
Type Continuity of Care Document (34133- 9) ▼	Source CW Staging Test Account 💙	Encounter	
Category	Author		

4. If the file is not a CCDA file, hovering over the import icon will read " Import as EDocument."



5. Select the folder to save the file, the filename, the received date, and the user/group that should review the eDocument. Enter your review message and priority, then click **Save**.

Save As EDocument	t		×
C-CDA Import			
Folder		To Be Reviewed By	
Search Patient Folders	Search	Search User/Group	Search
Filename		Review Message	
Test Import	.pdf		
Received Date			
		Priority 🔿 Low 💿 Normal 🔿 High	1
			Save

The documents will be available by navigating to **My Tasks** and selecting **eDocuments**. The eDocuments Task List displays a list of electronic documents needing additional review. For more information on processing eDocuments, visit our **My Task - eDocument** article.



Record Locator Profile

The Record Locator Profile is used as an alternative address and contact info screen for practices using our Record Locator (RecordSync) feature. Customers whose details in the "Company Profile" do not meet Surescripts' requirements, such as practices with a PO box instead of a physical address, an alternative public name, or an alternative phone number for medical records requests, can use this screen to update that information. The default values in the "Record Locator Organization Information" screen initially use the company profile data. However, once any field is updated, it becomes independent.

1. Navigate to the Setup portal



2. Select Record Locator Profile

If you do not see the Record Locator Profile, be sure to configure the permission via Roles so that is may be viewed. Search "Surescripts Record Locator Interface Setup" in Setup > Roles.

Interface Setup
Immunization Registry
PaySimple
SMART on FHIR Management
Text to Pay
TPS Authorization
TPS Claims
updox Account Setup
updox Fax Setup
Record Locator Profile
Call Reminder Setup
Call Reminder
Report Setup
Export Demographics
CKCC Setup
CKCC Dropdowns

3. If the details in the "Company Profile" do not meet Surescripts' requirements, update your Record Locator Organization Information

This may arise as an error message when first using Record Locator with a message close to "**No Configuration found for homeCommunityID**: XXX". In which case, the details in the Record Locator Organization Information should be reviewed and corrected. Once saved, if another error is received indicating a specific field is invalid, this will need to be corrected. If you are unsure how to proceed, please reach out to Support for a resolution.

Setup ‹‹	🔒 • Setup: Record Locator Profile	C4699 QAs	a t 🗛 🖛 😡 🖷 🔕
My Tasks Communication (37) Health Exchange (0) Coders (257)	Record Locator Organization Information		
Superbill (0) SOAP Notes (0) Comments (20) Prescription (10)	The following fields are used to ensure Surescripts Record Locator can connect and function proper	у.	
Eligibility (0)	Organization Name		
Patient Portal (244) Intake (131)	C4699 QAs		
Fax (0) Fax Updox (0)	Phone Number		
Case Mgmt. (0)	(847) 555-2525		
CoverMyMeds ePA (197)	Street		
eDocument Setup	PO BOX 123		
Unsolicited Documents Interface Setup	City	State	Zip Code
Immunization Registry PaySimple	Skokie	Illinois × 🗸	60076-5542
SMART on FHIR Management	Save		
Text to Pay TPS Authorization			
TPS Claims updox Account Setup			
Record Locator Profile			
Call Reminder Setup			
Report Setup Export Demographics			
CKCC Setup CKCC Dropdowns			
Administration			
🎇 Setup			
Reports			
EMR			
iScheduler			
Billing			
Desktop			

4. Click Save