RecordSync | Document Exchange

Last Modified on 04/16/2025 12:20 pm EDT

Overview of RecordSync

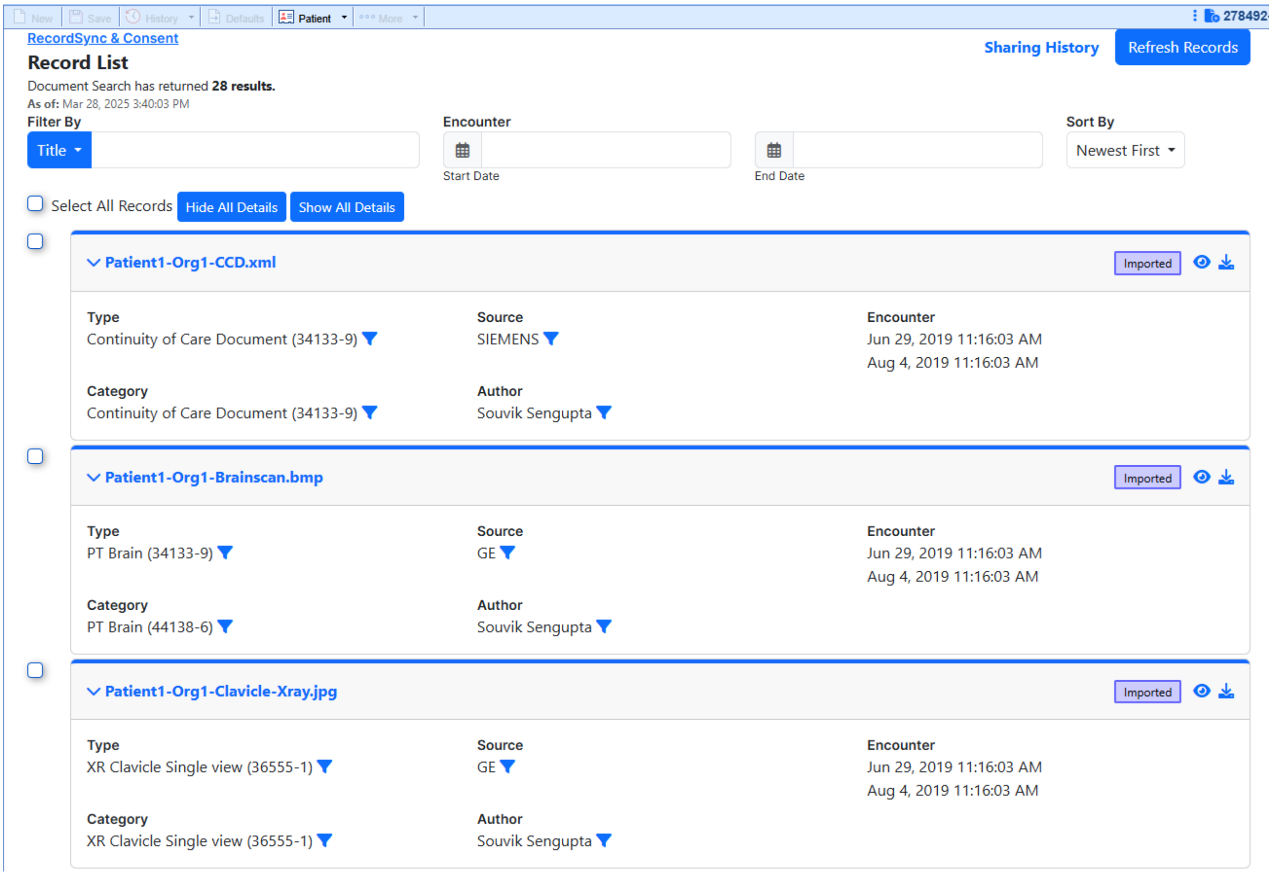
This feature is currently in **BETA.** It is expected to be released to all customers in early May; giving practices enough time to establish workflows before the 180-day reporting period for H2 of 2025.

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:

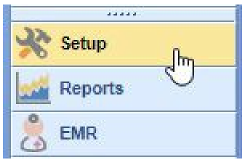
- **Required: Set up Role 'Surescripts Record Locator'** - This role allows users to see/use the Surescripts Record Locator chart tab.
- ***Optional: RLE Consent Template Letter*** *- Set up the RLE consent checkbox associated with signing the letter for intakes that have a letter setup.*
- ***Required: Chart Tabs Favorites Setup*** *- Surescripts Record Locator must be added to your Setup Favorites for it to be displayed within your Chart Tabs.*

Surescripts Record Locator Role Setup Details

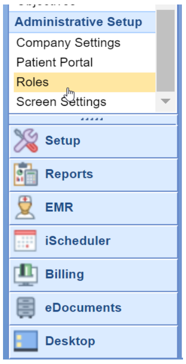
You must turn on the Surescripts Record Locator role to use RecorSync:

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

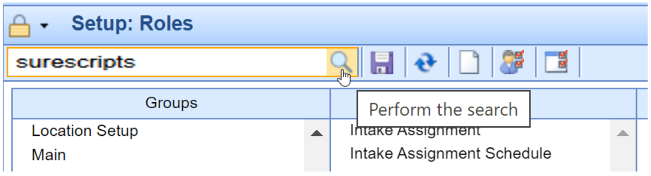
1. Click on the **Setup** portal.



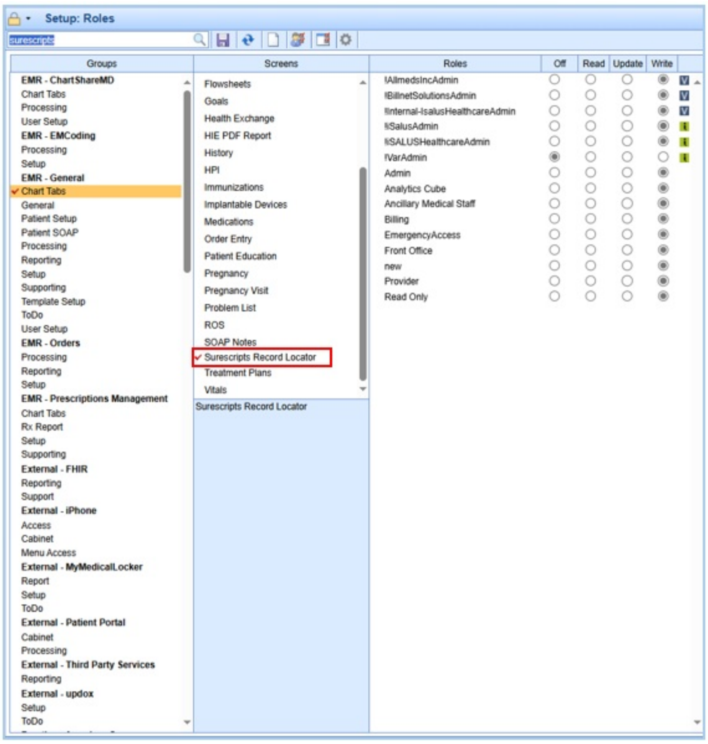
2. Select **Roles** under Administrative Setup.



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



4. The **Surescripts Record Locator role** should return and be selected. Assign **Write** access to the appropriate roles (best practice is to assign Write access to all roles).



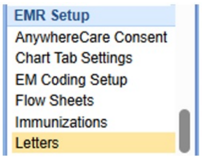
5. Press the **Save** button to save your changes

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.

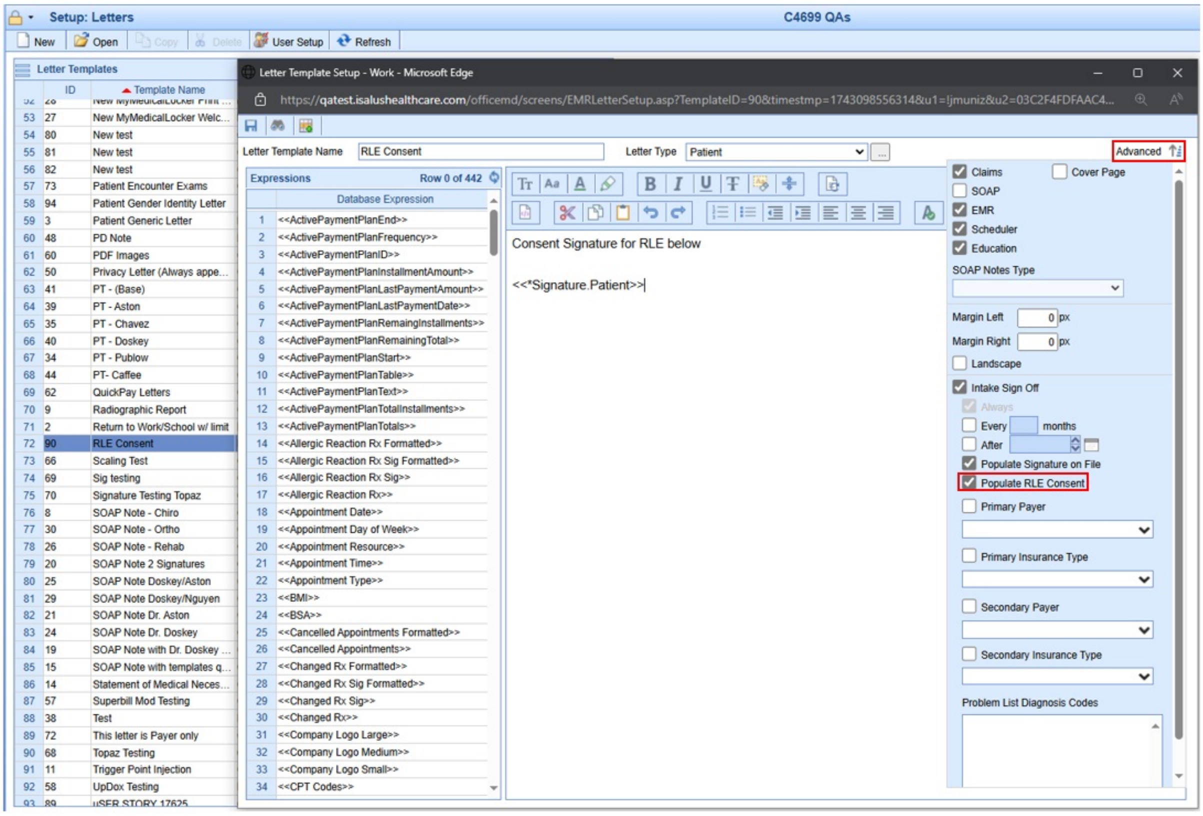


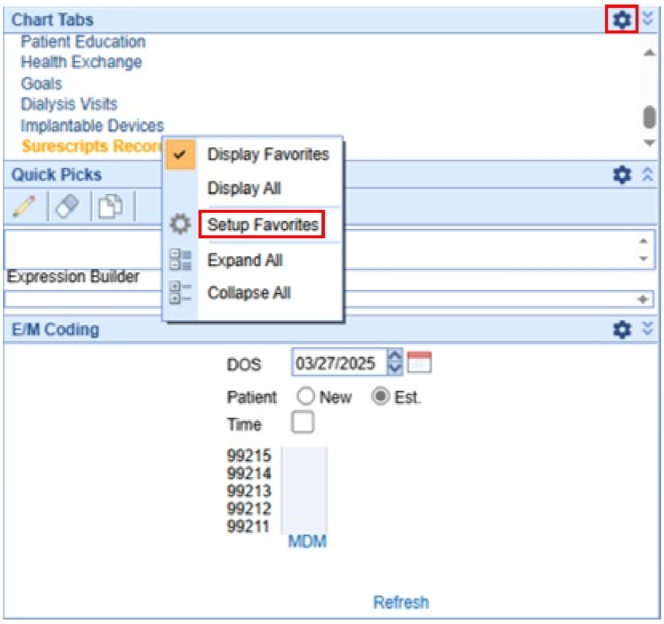
Chart Tab Favorites Setup

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.

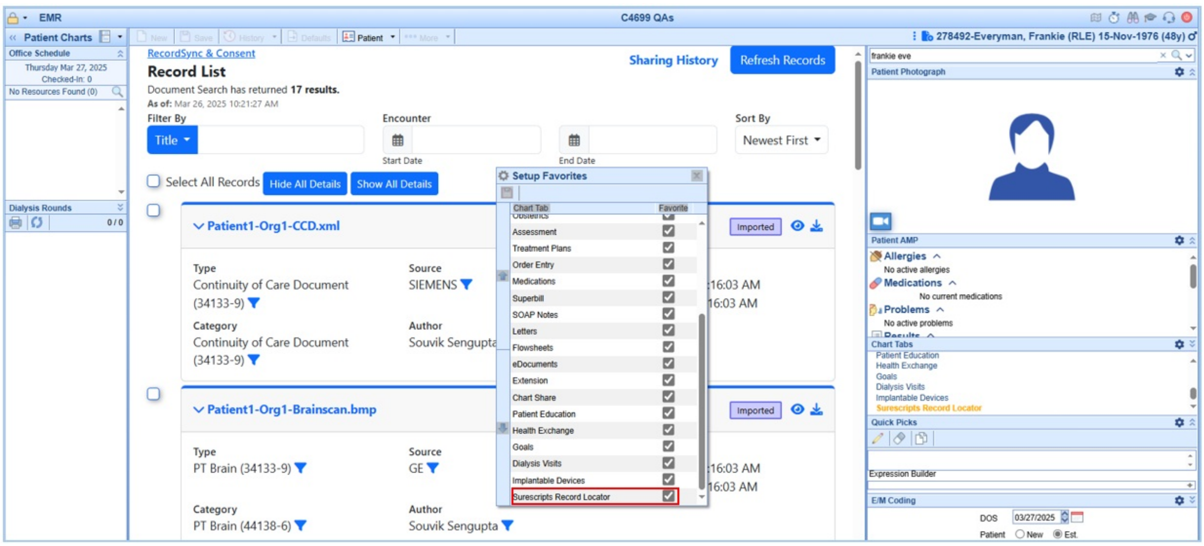
Note: *Until you add the Surescripts Record Locator to your Setup Favorites, it will not be visible within your Chart Tabs.*

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

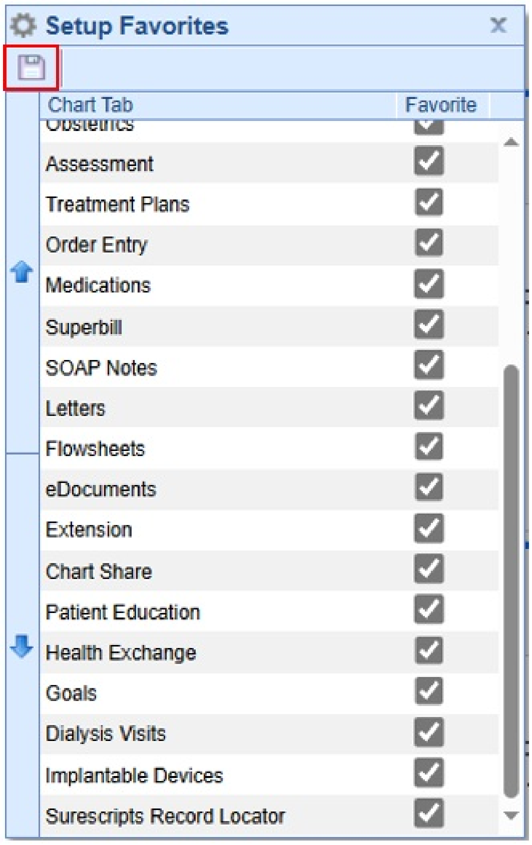
2. Select your patient and access the Chart Tabs Setup Favorites option.



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

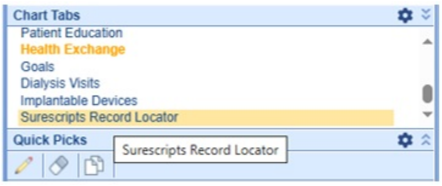


4. Click Save.

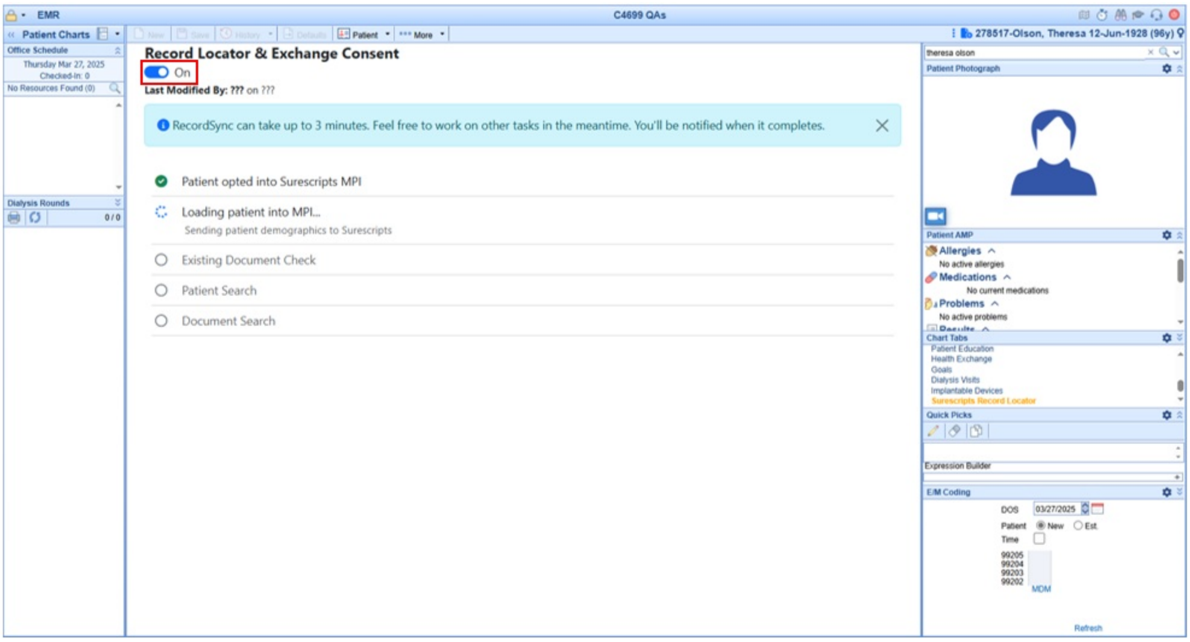


Retrieving documents using RecordSync

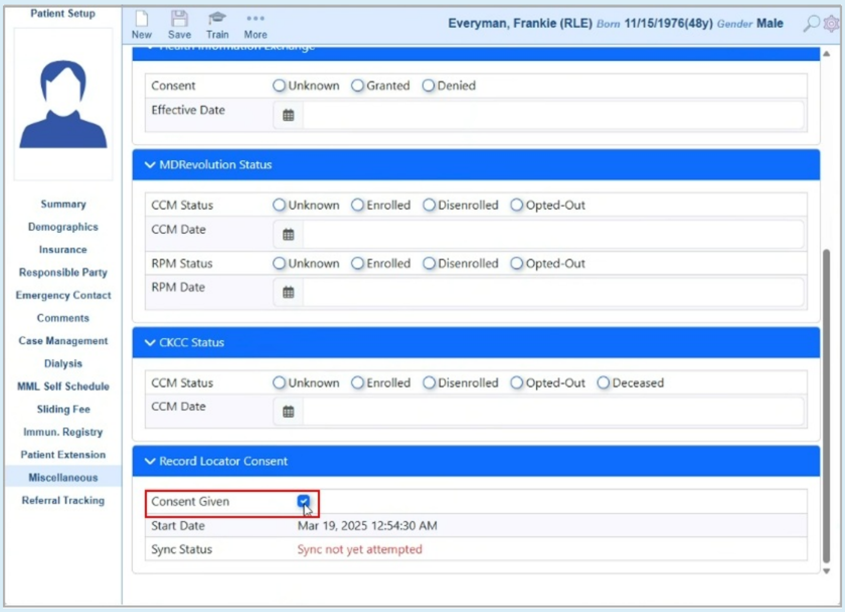
1. Once in a patient's chart, select the **Surescripts Record Locator** chart tab.



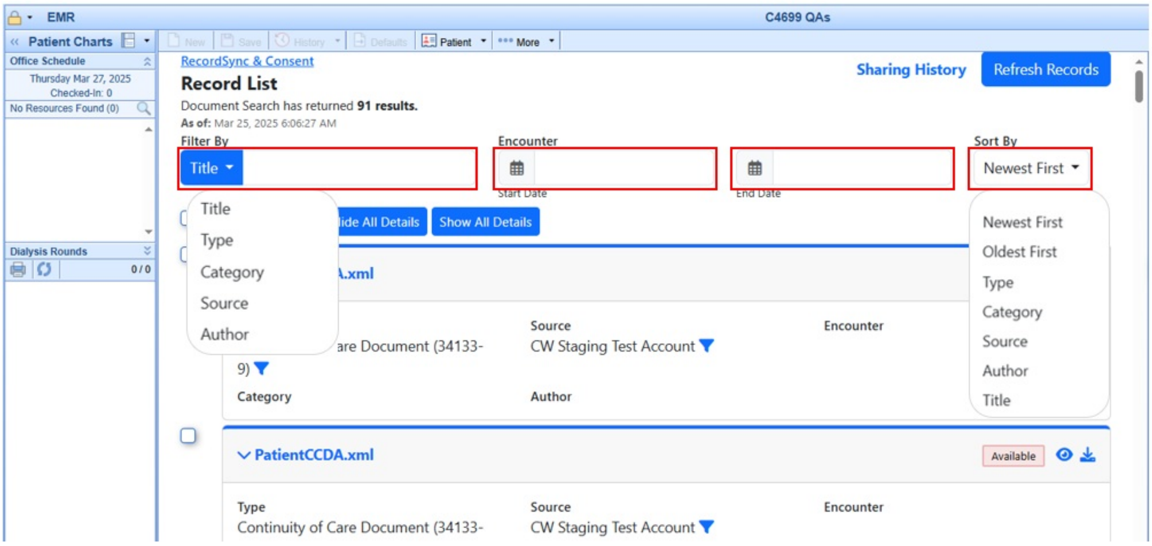
2. Based on your office SOP, you must ensure the RecordSync & Consent for Surescripts has been provided (opted in) by the patient and the **Record Locator & Exchange Consent** toggle switched to the **ON** position.



Tip: You can also provide Record Locator Consent from the **Patient Setup** > **Miscellaneous** screen.



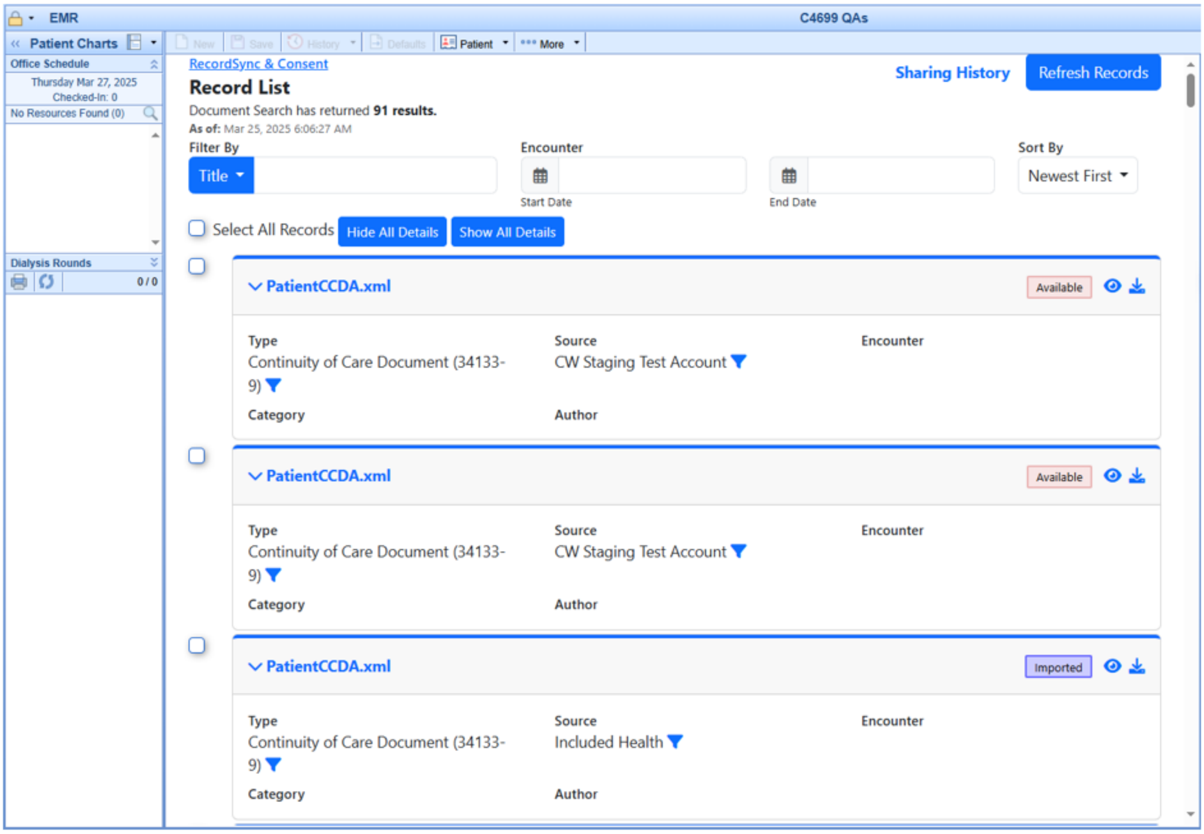
3. Search for documents by filtering by Title, Type, Category, Source, or Author. You can also filter by Encounter Start and End Date. You can also sort by Newest First, Oldest First, Type, Category, Source, Author, and Title. Once records are retrieved, they are kept for a period of 30 days. A new search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



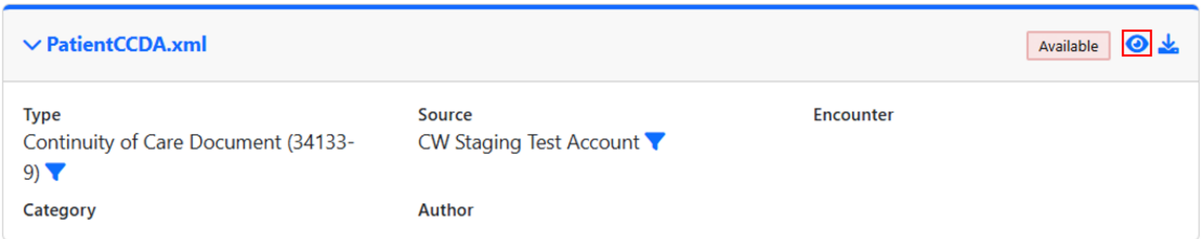
A list of documents based on your search filters will be available. These documents will be in one of the following statuses:

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.

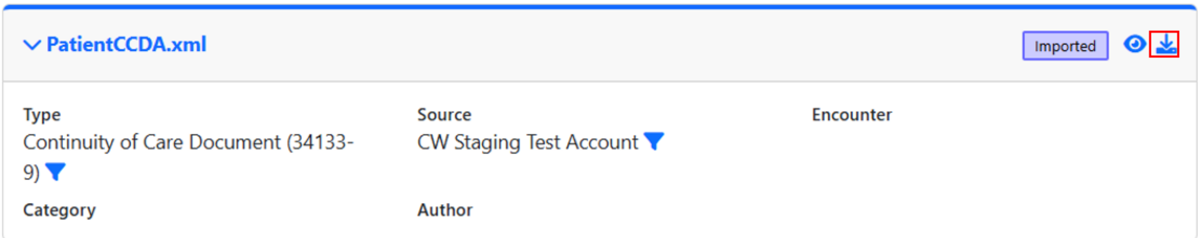
4. Most files will be CCDA files. Please note that if the file is not a CCDA file, the "*Save As eDocument*" screen will prompt you to select how and where to save the file (same workflow as with other eDocuments).



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



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



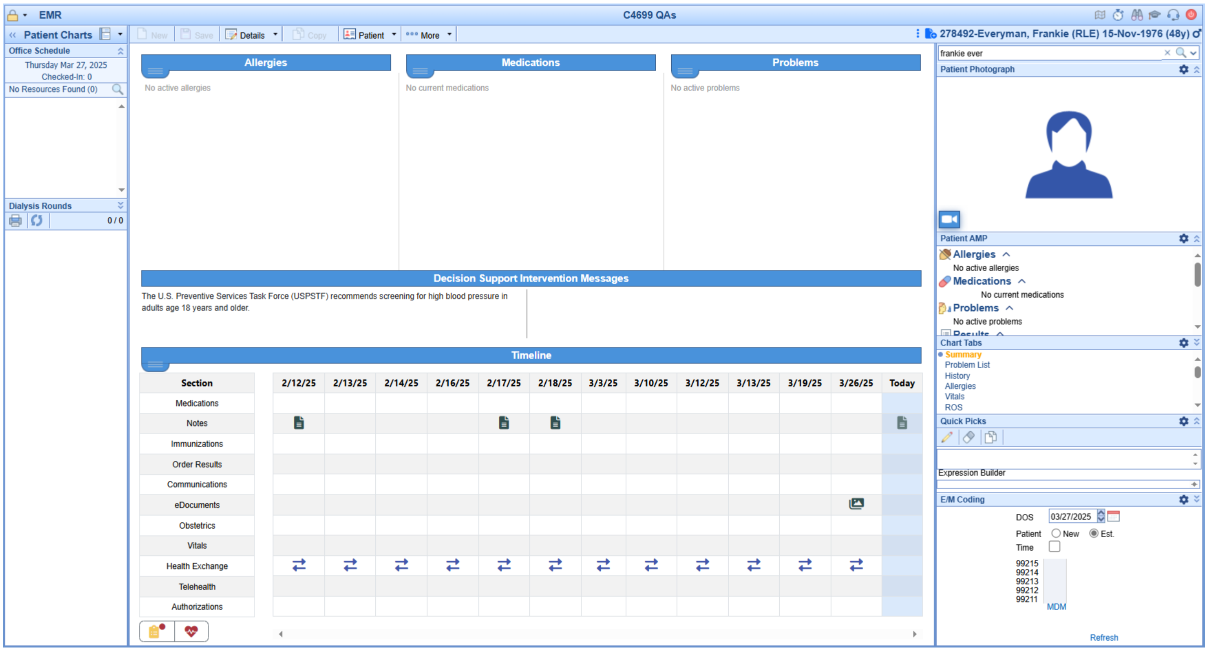
Please be aware that after importing the documents, there is no automatic reconciliation process. The documents are added to the reconciliation queue in the Summary chart tab, but they still need to be manually merged/reconciled via the normal reconciliation process.

Merging CCDs with RecordSync & the Reconciliation screen

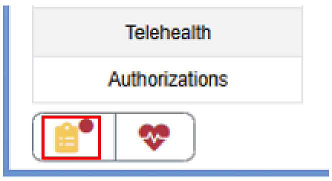
Please note that if a document is not a CCD, it will be imported as an eDocument. For more information on importing non-CCD documents into eDocuments, please refer to our Indexing and Tasking eDocuments article.

Follow these steps to Merge/Reconcile CCDs:

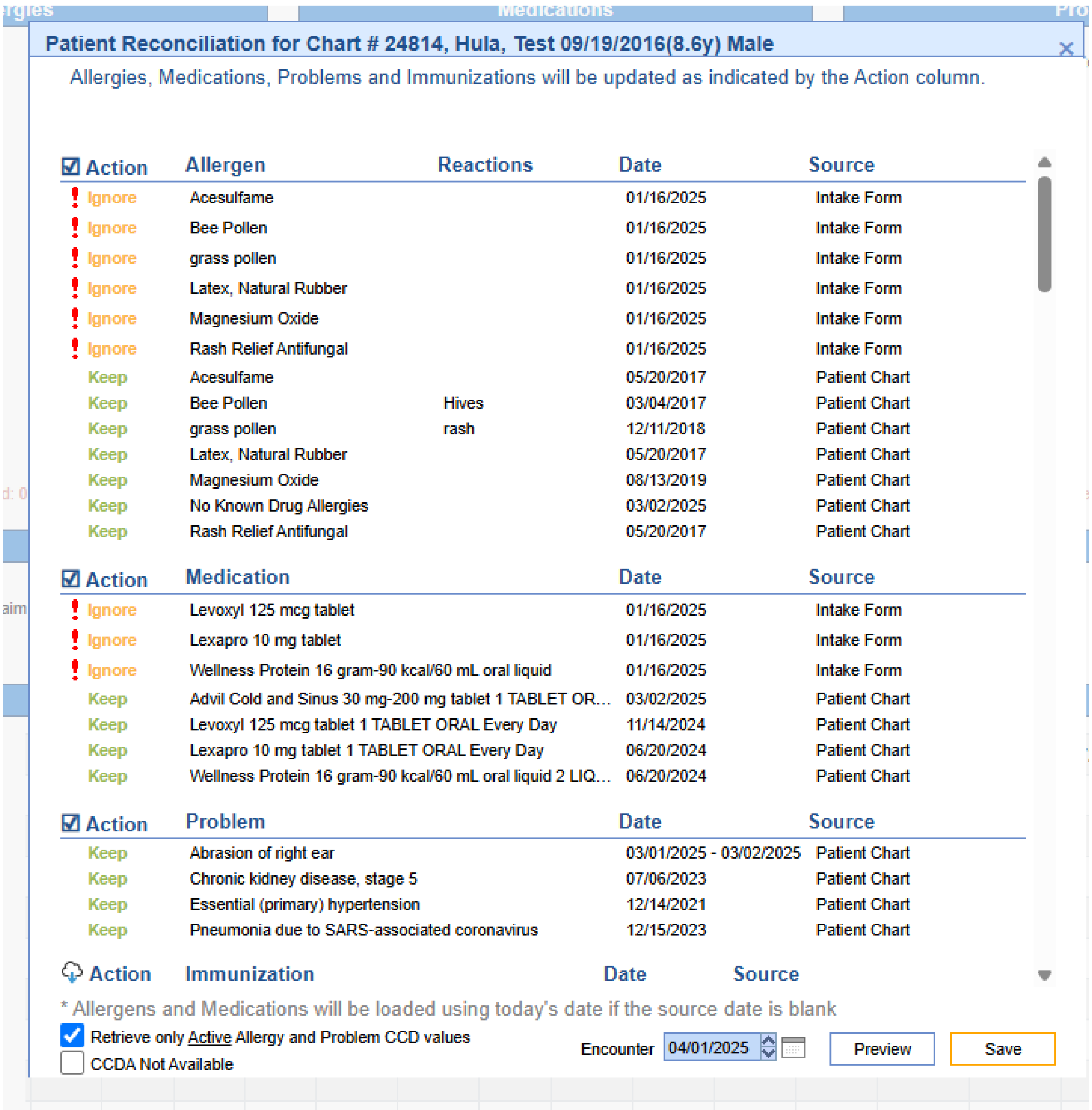
1. Once the CCD documents have been imported, open the patient's chart in the EMR (ensure you are on the Timeline Summary screen).



2. Click the **Patient Reconciliation** (clipboard icon).



3. 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.



Patient Reconciliation for Chart # 24814, Hula, Test 09/19/2016(8.6y) Male

Allergies, Medications, Problems and Immunizations will be updated as indicated by the Action column.

Action	Allergen	Reactions	Date	Source
Ignore	Acesulfame		01/16/2025	Intake Form
Ignore	Bee Pollen		01/16/2025	Intake Form
Ignore	grass pollen		01/16/2025	Intake Form
Ignore	Latex, Natural Rubber		01/16/2025	Intake Form
Ignore	Magnesium Oxide		01/16/2025	Intake Form
Ignore	Rash Relief Antifungal		01/16/2025	Intake Form
Keep	Acesulfame		05/20/2017	Patient Chart
Keep	Bee Pollen	Hives	03/04/2017	Patient Chart
Keep	grass pollen	rash	12/11/2018	Patient Chart
Keep	Latex, Natural Rubber		05/20/2017	Patient Chart
Keep	Magnesium Oxide		08/13/2019	Patient Chart
Keep	No Known Drug Allergies		03/02/2025	Patient Chart
Keep	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
Keep	Advil Cold and Sinus 30 mg-200 mg tablet 1 TABLET OR...	03/02/2025	Patient Chart
Keep	Levoxyl 125 mcg tablet 1 TABLET ORAL Every Day	11/14/2024	Patient Chart
Keep	Lexapro 10 mg tablet 1 TABLET ORAL Every Day	06/20/2024	Patient Chart
Keep	Wellness Protein 16 gram-90 kcal/60 mL oral liquid 2 LIQ...	06/20/2024	Patient Chart

Action	Problem	Date	Source
Keep	Abrasion of right ear	03/01/2025 - 03/02/2025	Patient Chart
Keep	Chronic kidney disease, stage 5	07/06/2023	Patient Chart
Keep	Essential (primary) hypertension	12/14/2021	Patient Chart
Keep	Pneumonia due to SARS-associated coronavirus	12/15/2023	Patient Chart

Action	Immunization	Date	Source

* Allergens and Medications will be loaded using today's date if the source date is blank

Retrieve only Active Allergy and Problem CCD values

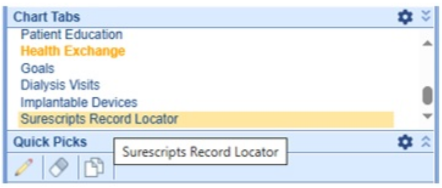
CCDA Not Available

Encounter 04/01/2025 Preview Save

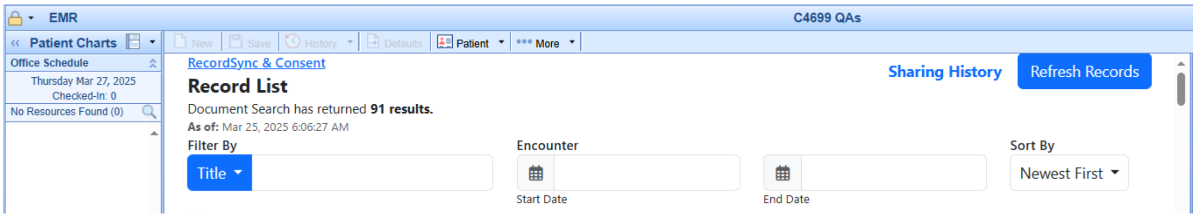
Viewing requested records in Sharing History

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

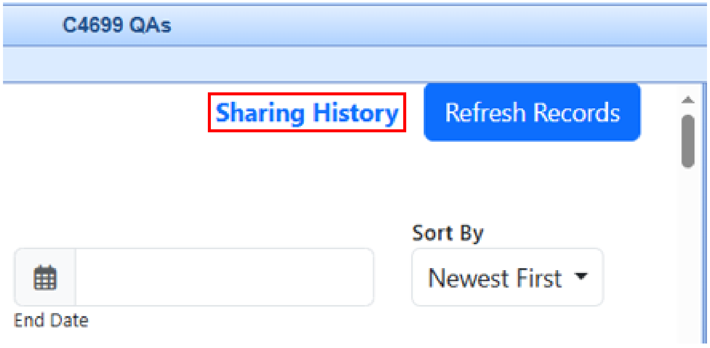
1. Once in a patient's chart, select the **Surescripts Record Locator** chart tab.



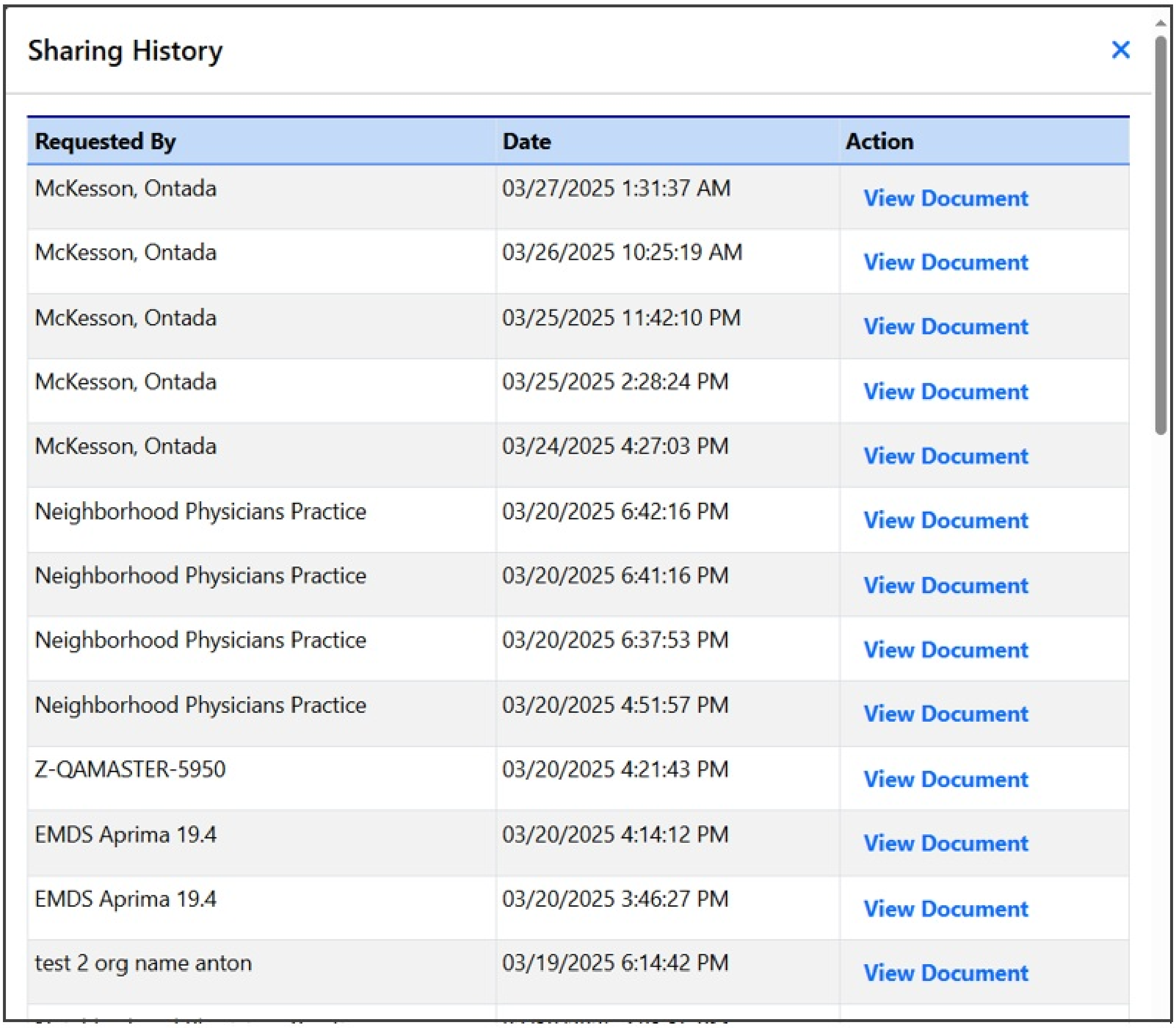
2. Search for documents using the available filters.



3. Click Sharing History.



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



Sharing History

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
Neighborhood Physicians Practice	03/20/2025 4:51:57 PM	View Document
Z-QAMASTER-5950	03/20/2025 4:21:43 PM	View Document
EMDS Aprima 19.4	03/20/2025 4:14:12 PM	View Document
EMDS Aprima 19.4	03/20/2025 3:46:27 PM	View Document
test 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.

PROMOTING INTEROPERABILITY
ONC 2015 Edition Cures Update EHR: for 2025 reporting year.

Measure	Performance Rate		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:	0 / 100
		Promoting Interoperability 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

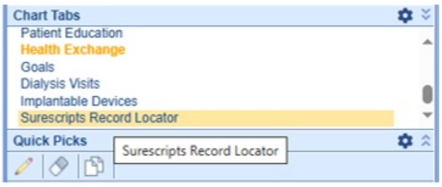
The MIPS-eligible clinician must attest YES to the following:

- 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.



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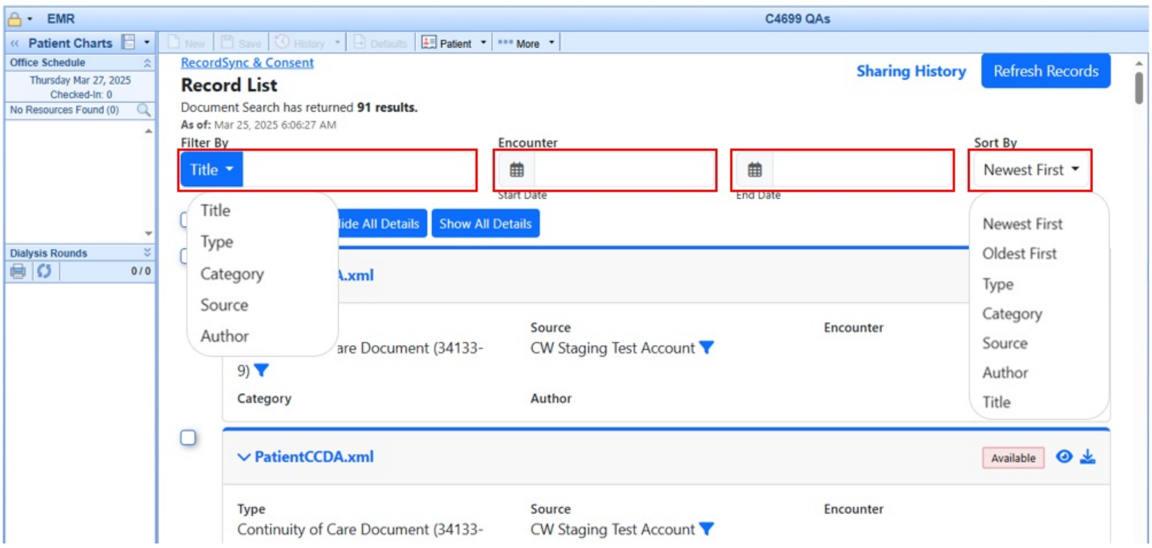
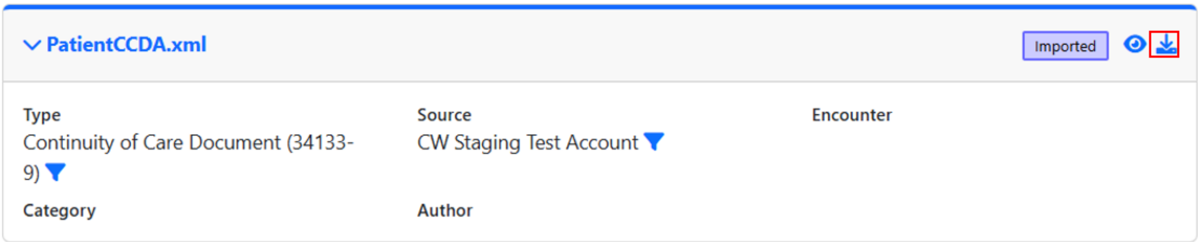
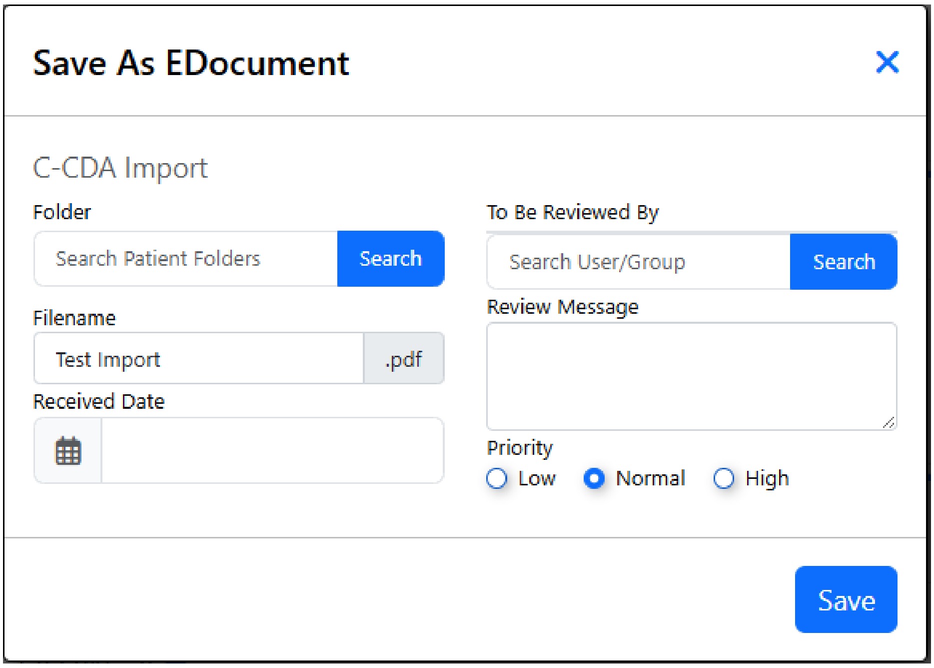


3. To import the file, select the **Import icon** on the top right of the document tab.



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**.



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.