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## HIPAA:

**It is the responsibility of every practice to have a downtime plan created in the event that there is a service disruption which can include local Internet issues or ICANotes server failures.**

Please review Administrative Safeguard requirement for "Emergency Mode Operation Plan" in place as referred to in the HIPAA law cited below:

Screenshot from: <https://www.law.cornell.edu/cfr/text/45/164.308>

**CFR** > Title 45 > Chapter A > Subchapter C > Part 164 > Subpart C > Section 164.308

### 45 CFR 164.308 - Administrative safeguards.

(7)

**(i) Standard: Contingency plan.** Establish (and implement as needed) policies and procedures for responding to an emergency or other occurrence (for example, fire, vandalism, system failure, and natural disaster) that damages systems that contain electronic protected health information.

**(ii) Implementation specifications:**

**(A) Data backup plan (Required).** Establish and implement procedures to create and maintain retrievable exact copies of electronic protected health information.

**(B) Disaster recovery plan (Required).** Establish (and implement as needed) procedures to restore any loss of data.

**(C) Emergency mode operation plan (Required).** Establish (and implement as needed) procedures to enable continuation of critical business processes for protection of the security of electronic protected health information while operating in emergency mode.

**(D) Testing and revision procedures (Addressable).** Implement procedures for periodic testing and revision of contingency plans.

**(E) Applications and data criticality analysis (Addressable).** Assess the relative criticality of specific applications and data in support of other contingency plan components.

## ICANotes Servers Downtime/Emergency Procedure

### ICANotes Recommends:

- Use the Upload Site to get previous reports for your patients.
- Upload Site versus backup Upload Site.
- Print your schedule the day before.
- Keep a prescription pad at your office.
- For DrFirst and if you have Internet service, you can go to DrFirst site directly. Call ICANotes Support by telephone at 443-569-8778 to obtain login username and password.

### Using the Upload Site

#### Accessing the Upload Site:

1. Open your Internet Browser to the following location: <https://upload.icanotes.com>
2. Log in with your ICANotes Username and Password.

ICANotes Documents Login

This is a private computer system and is the property of ICANotes LLC. It is for authorized use only. Unauthorized or improper use of this system may result in administrative disciplinary action and civil and criminal penalties. By continuing to use this system you indicate your awareness of and consent to these terms and conditions of use. LOG OFF IMMEDIATELY if you do not agree to the conditions stated in this warning.

Login

User name

Password

Forgot Password?

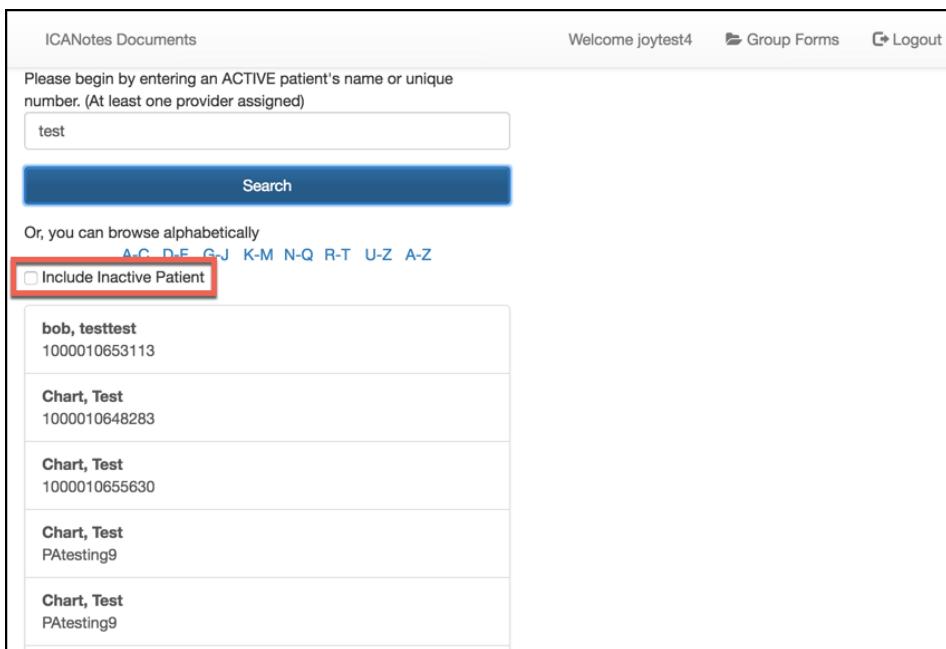
Remember me?

Sign In

## ICANotes Servers Downtime/Emergency Procedure

3. Enter in the Patient's Name or Unique Number and click the  button. You can also click on the "A-Z" URL on the lower right.

NOTE: If you want to include inactive patients in your search, be sure to check "Include Inactive Patient".



ICANotes Documents

Welcome joytest4  

Please begin by entering an ACTIVE patient's name or unique number. (At least one provider assigned)

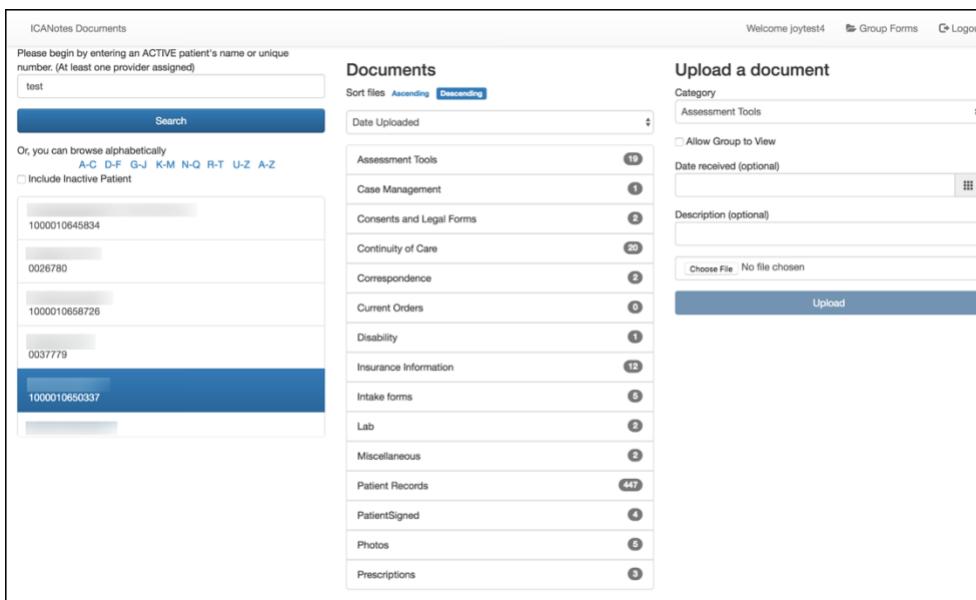


Or, you can browse alphabetically [A-C](#) [D-F](#) [G-J](#) [K-M](#) [N-Q](#) [R-T](#) [U-Z](#) [A-Z](#)

Include Inactive Patient

bob, testtest 1000010653113
Chart, Test 1000010648283
Chart, Test 1000010655630
Chart, Test PAtesting9
Chart, Test PAtesting9

4. After locating the correct patient, click on the patient's name to display the ICANotes Uploads page.



ICANotes Documents

Welcome joytest4  

Please begin by entering an ACTIVE patient's name or unique number. (At least one provider assigned)



Or, you can browse alphabetically [A-C](#) [D-F](#) [G-J](#) [K-M](#) [N-Q](#) [R-T](#) [U-Z](#) [A-Z](#)

Include Inactive Patient

1000010645834
0026780
1000010656726
0037779
1000010650337

**Documents**

Sort files [Ascending](#) [Descending](#)

Date Uploaded	Count
Assessment Tools	19
Case Management	1
Consents and Legal Forms	2
Continuity of Care	20
Correspondence	2
Current Orders	0
Disability	1
Insurance Information	12
Intake forms	6
Lab	2
Miscellaneous	2
Patient Records	447
PatientSigned	4
Photos	5
Prescriptions	3

**Upload a document**

Category 

Assessment Tools

Allow Group to View

Date received (optional)

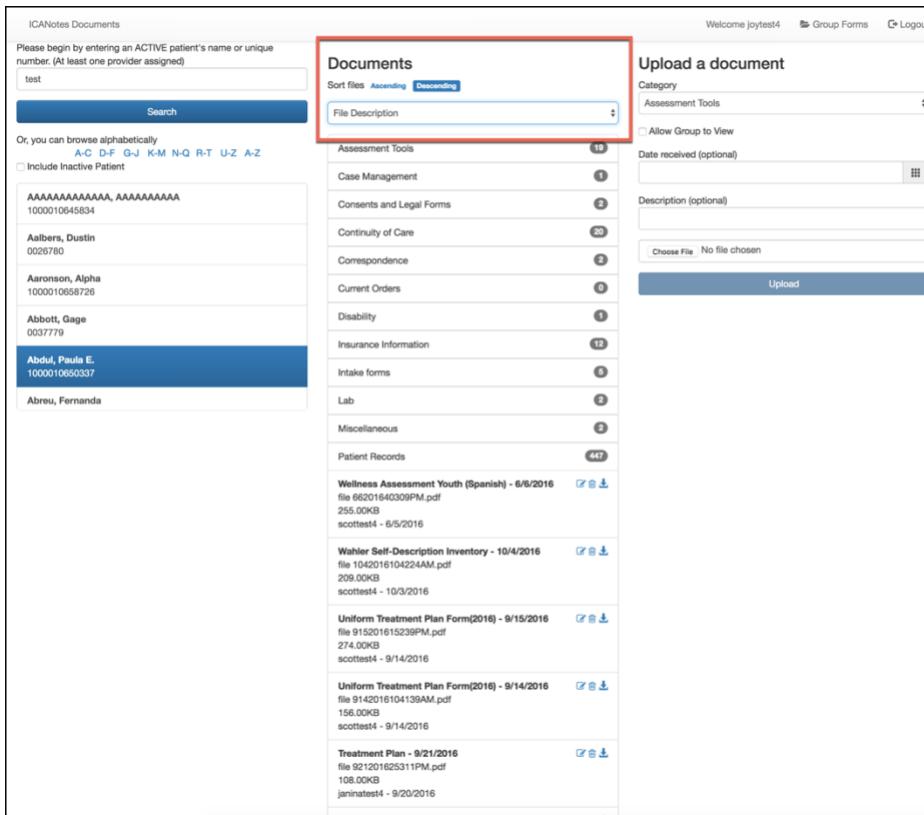
Description (optional)

Choose File  No file chosen

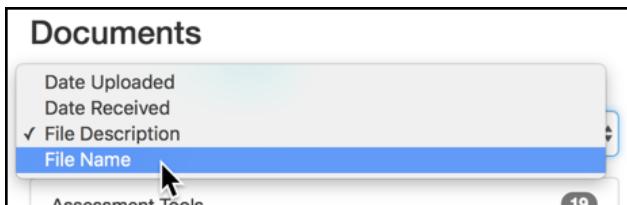


# ICANotes Servers Downtime/Emergency Procedure

5. To help locate documents, use the filters. The first filter is Ascending or Descending.



The screenshot shows the ICANotes Documents page. On the left, there is a search bar and a list of patients. On the right, there is a sidebar with categories like Assessment Tools, Case Management, and Patient Records. The main area displays a list of uploaded documents with columns for file name, date uploaded, date received, and file size. An 'Upload a document' form is visible on the right, with a 'File Description' dropdown highlighted by a red box.



The screenshot shows a dropdown menu for filtering documents. The options listed are Date Uploaded, Date Received, ✓ File Description, and File Name. The 'File Name' option is highlighted with a blue selection bar and a cursor arrow pointing to it.

## Backup Upload Site And When To Use

The backup Upload Site *should only* be used in the event of an emergency that renders the Upload Site unavailable.

1. In the rare event of an emergency or loss of ICANotes and the Upload site functionality, there is a backup website where one can access, print, or download existing notes. Go to: <https://backup.icanotes.com>

# ICANotes Servers Downtime/Emergency Procedure

**Welcome to the ICANotes Backup Site**

In the rare event of an emergency or loss of ICANotes functionality, you may use this webpage to access, print, or download your existing notes. Once you login, search for a patient using the column on the left, then narrow down the category using the middle column. Notes created in ICANotes are listed under "Patient Records."

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Notice: Every Friday night from 12:00am to 1:00am Eastern time access to ICANotes may be limited due to scheduled maintenance.

Username:  Password:

To begin, please enter your ICANotes username and password.

2. Use your ICANotes username and password to log into the site.

3. One can look up patients just like the upload site.

**ICANotes Documents Backup**

Please begin by entering an ACTIVE patient's name or unique number. (At least one provider assigned)

Or, you can browse alphabetically.

[A-C](#) [D-F](#) [G-J](#) [K-M](#) [N-Q](#) [R-T](#) [U-Z](#) [A-Z](#)

[Log-out](#)

4. Look up the patient on the left by either typing in last name or browse alphabetically.

**ICANotes Documents Backup**

joytest4 | [Log-out](#)

Please begin by entering an ACTIVE patient's name or unique number. (At least one provider assigned)

Or, you can browse alphabetically.

[A-C](#) [D-F](#) [G-J](#) [K-M](#) [N-Q](#) [R-T](#) [U-Z](#) [A-Z](#)

**Documents**

- [Assessment Tools \(no files\)](#)
- [Case Management \(no files\)](#)
- [Consents and Legal Forms \(no files\)](#)
- [Continuity of Care \(1 file\)](#)
- [Correspondence \(no files\)](#)
- [Current Orders \(1 file\)](#)
- [Disability \(no files\)](#)
- [Insurance Information \(no files\)](#)
- [Intake Forms \(no files\)](#)
- [Lab \(no files\)](#)
- [Miscellaneous \(no files\)](#)

**Patient Records (1 file)**

Progress Note - 9/9/2014  
1000010655630 99201494053PM.pdf - 109.00KB  
chadtest4 09/09/2014

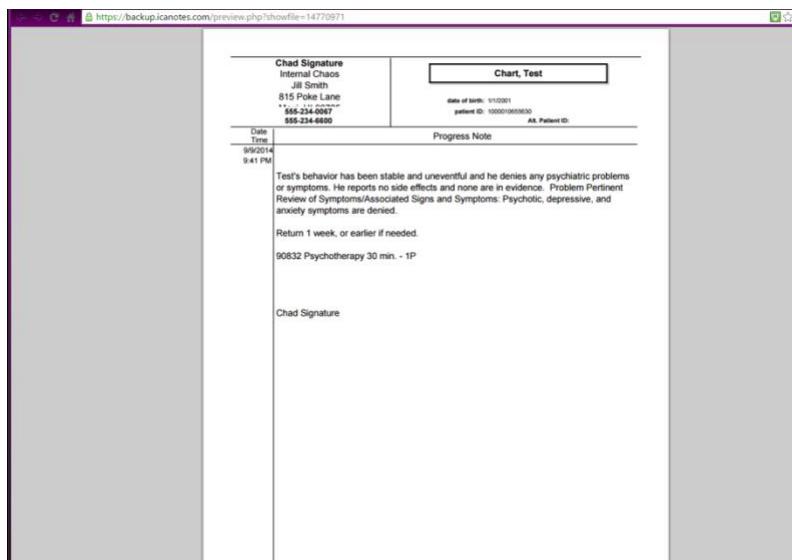
[Photos \(no files\)](#)

[Prescriptions \(no files\)](#)

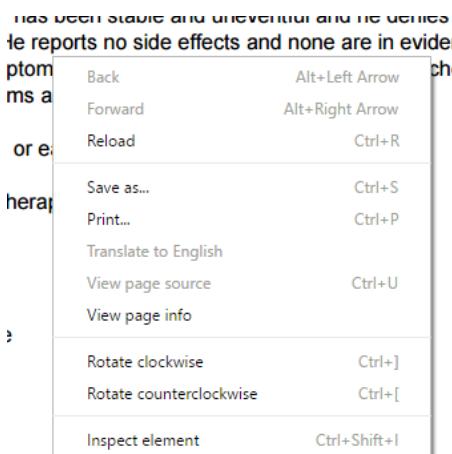
bob, testtest 1000010653113	
Brother, Testmiss 136	
Chart, Test 1000010648283	
Chart, Test 1000010655630	
Chart, Test PAtesting9	
Chart, Test PAtesting9	
Clinton, Bill Test40001	
Dedo, Alanna testt234	
Dontest, James 1000010658471	
Dontest, John 1000010658469	

5. The image will open in another browser window.

# ICANotes Servers Downtime/Emergency Procedure



6. One can print the document or save the document by right clicking within the document and a drop-down menu will pop up.



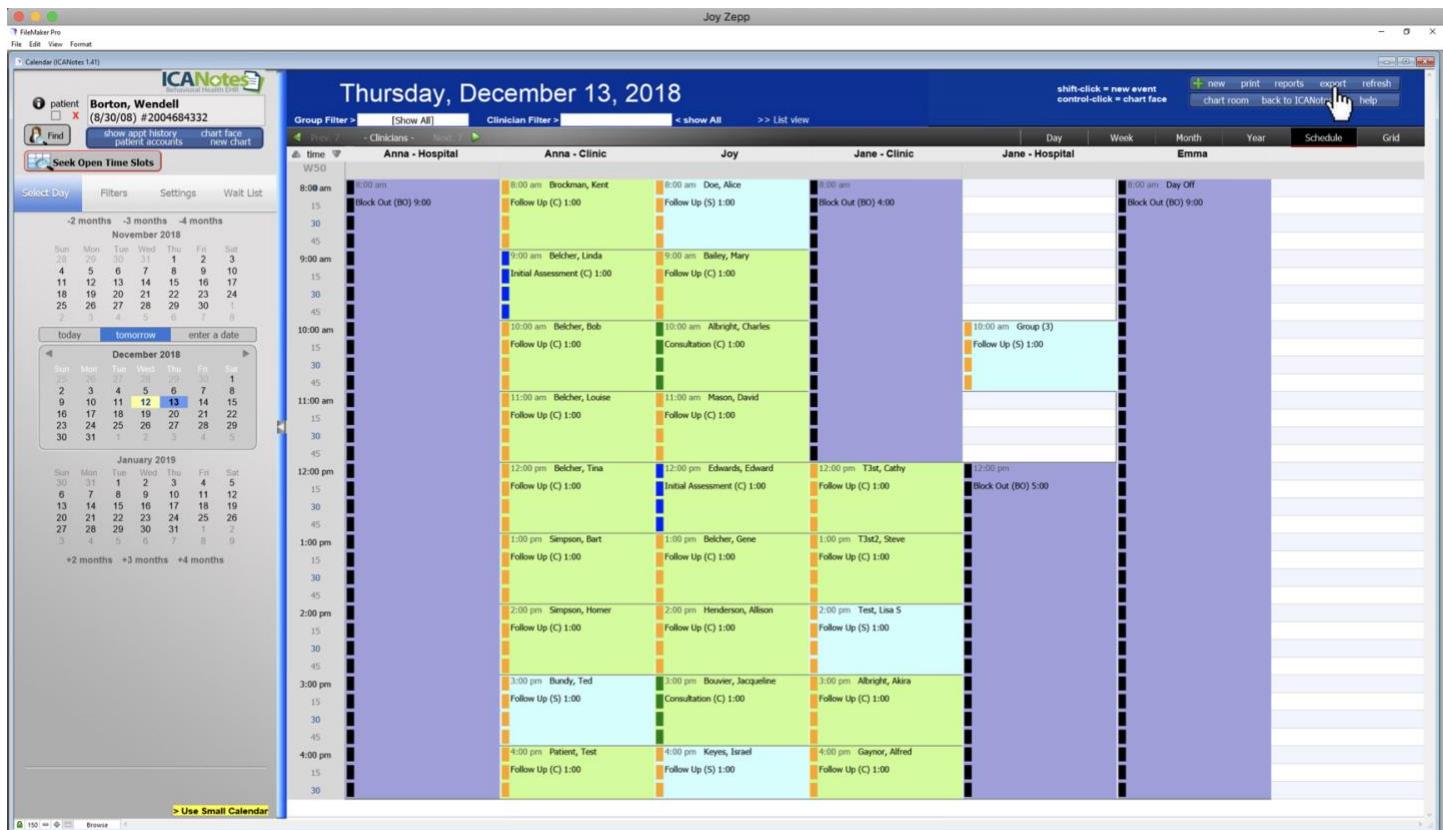
Users are not able to upload documents to this site. Once ICANotes is back up, one can upload documents through the normal upload site located at <https://upload.icanotes.com>

## Print Schedule The Day Before

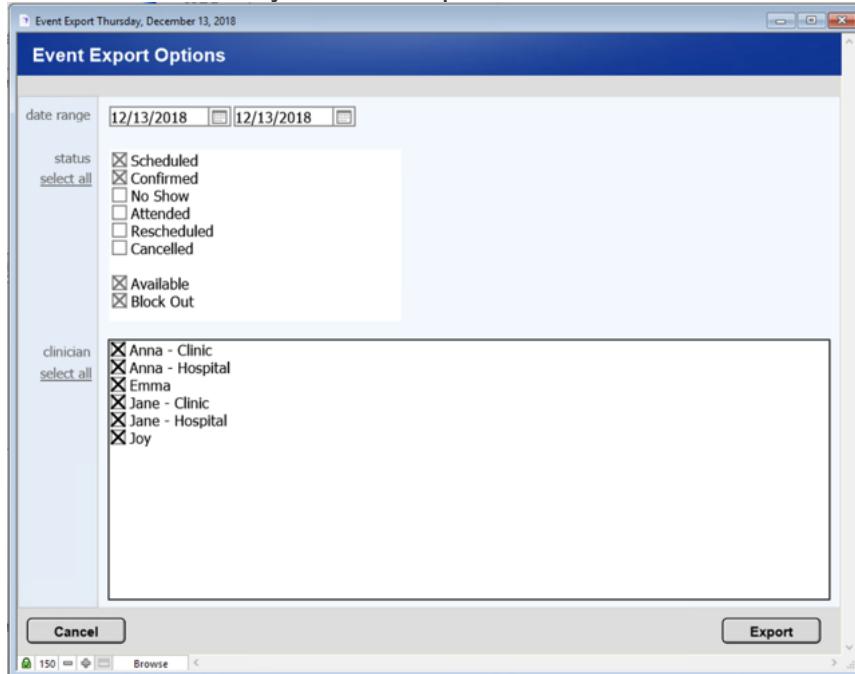
### Legacy Calendar

1. From the Legacy Calendar, click the **export** button.

# ICANotes Servers Downtime/Emergency Procedure



2. Choose the date range. For this example, I am printing one day, 12/13/2018. Choose the status and clinicians that you want to print.



3. Once all of the selections have been made, click the **Export** button.

4. You will receive a popup message. Click the OK button to close the message.

## ICANotes Servers Downtime/Emergency Procedure



### 5. Go to the Upload Site and log in using your ICANotes username and password.

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Login

User name  
jzepp

Password  
.....

Forgot Password?

Remember me?

Sign In

### 6. On the left side, click the Exports link and then choose the report to export.

ICANotes Documents

Welcome jzepp

Exports 2

Video Tutorials

Patient Documents

Group Forms

Manage Folders

Logout

Please begin by entering an ACTIVE patient's name or unique number. (At least one provider assigned)

Name or ID

Refresh Exports

Calendar Export EXCEL | CSV 12/12/2018 9:36 AM

Calendar Export EXCEL | CSV 12/12/2018 9:27 AM

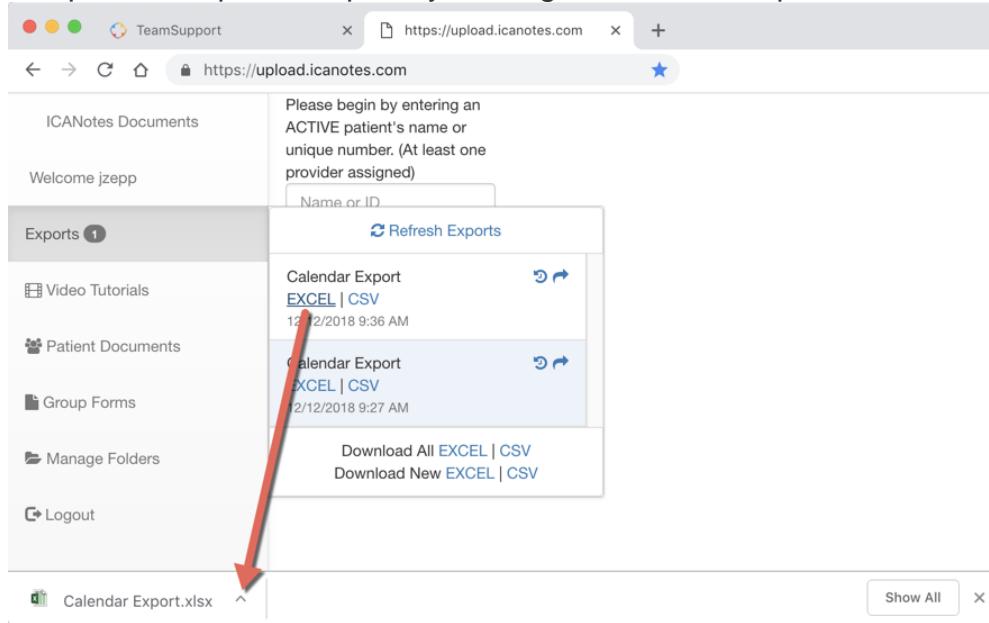
A-Z

Download All EXCEL | CSV

Download New EXCEL | CSV

# ICANotes Servers Downtime/Emergency Procedure

7. Open the exported report by clicking downloaded report on the bottom of the right.



TeamSupport https://upload.icanotes.com

ICANotes Documents Please begin by entering an ACTIVE patient's name or unique number. (At least one provider assigned)

Welcome jzep Welcome jzep

Exports 1

Video Tutorials

Patient Documents

Group Forms

Manage Folders

Logout

Calendar Export EXCEL | CSV 12/12/2018 9:36 AM

Calendar Export EXCEL | CSV 12/12/2018 9:27 AM

Download All EXCEL | CSV Download New EXCEL | CSV

Calendar Export.xlsx

Show All X

8. When the report opens, it will be shown in Excel as selected. It can be printed from Excel.

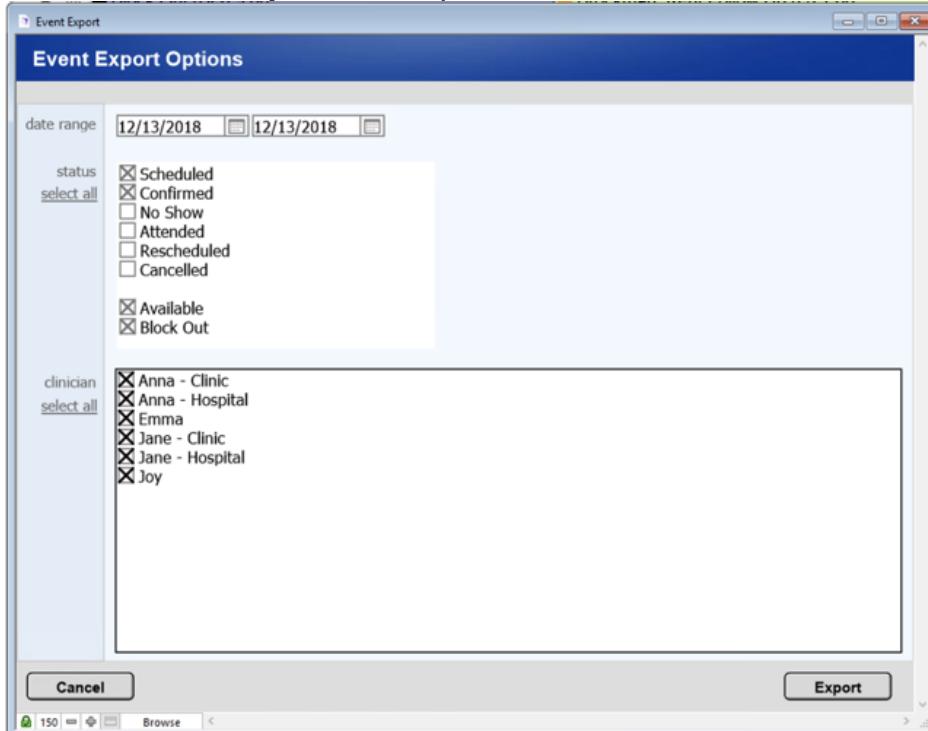
	A	B	C	D	E	F	G	H	I	J
1	Status	Late	Date	Start Time	End Time	First Name	Last Name	Unique ID#	DOB	Age
2	Confirmed		12/13/2018	08:00:00	9:00:00	Kent	Brockman	2004684333	09/18/1968	49
3	Block Out		12/13/2018	08:00:00	17:00:00					
4	Block Out		12/13/2018	08:00:00	17:00:00					
5	Block Out		12/13/2018	08:00:00	12:00:00					
6	Scheduled		12/13/2018	08:00:00	9:00:00	Alice	Doe	2004684621	08/19/1984	34
7	Confirmed		12/13/2018	09:00:00	10:00:00	Linda	Belcher	2004690021	09/18/1968	49
8	Confirmed		12/13/2018	09:00:00	10:00:00	Mary	Bailey	2004684331	07/21/1973	45
9	Confirmed		12/13/2018	10:00:00	11:00:00	Bob	Belcher	2004690020	05/18/1967	51
10	Scheduled		12/13/2018	10:00:00	11:00:00	Charles	Burns	2004684335	06/25/1917	101
11						Barbara	Hudson	2004692406	02/14/1963	55
12						Wendell	Borton	2004684332	08/30/2008	8
13	Confirmed		12/13/2018	10:00:00	11:00:00	Charles	Albright	2004676557	08/10/1933	84
14	Confirmed		12/13/2018	11:00:00	12:00:00	Louise	Belcher	2004690024	10/26/2009	8
15	Confirmed		12/13/2018	11:00:00	12:00:00	David	Mason	2004676566	12/02/1956	59
16	Confirmed		12/13/2018	12:00:00	13:00:00	Tina	Belcher	2004690022	02/18/2005	13
17	Confirmed		12/13/2018	12:00:00	13:00:00	Cathy	T3st	1000010670492	01/10/1949	69
18	Block Out		12/13/2018	12:00:00	17:00:00					555
19	Confirmed		12/13/2018	12:00:00	13:00:00	Edward	Edwards	2004676562	06/14/1933	85
20	Confirmed		12/13/2018	13:00:00	14:00:00	Bart	Simpson	2004689658	02/23/2007	11
21	Confirmed		12/13/2018	13:00:00	14:00:00	Steve	T3st2	1000010670452	01/05/1972	46
22	Confirmed		12/13/2018	13:00:00	14:00:00	Gene	Belcher	2004690023	10/10/2007	10
23	Confirmed		12/13/2018	14:00:00	15:00:00	Homer	Simpson	2004684328	02/28/1968	50
24	Scheduled		12/13/2018	14:00:00	15:00:00	Lisa	Test	1000010670496	01/08/1972	46
25	Confirmed		12/13/2018	14:00:00	15:00:00	Allison	Henderson	2004692409	02/14/1963	55
26	Scheduled		12/13/2018	15:00:00	16:00:00	Ted	Bundy	2004678417	11/24/1946	71
27	Confirmed		12/13/2018	15:00:00	16:00:00	Akira	Albright	2004684329	08/21/1985	33
28	Confirmed		12/13/2018	15:00:00	16:00:00	Jacqueline	Bouvier	2004684330	10/10/1925	91
29	Confirmed		12/13/2018	16:00:00	17:00:00	Test	Patient	2004689493ABC	06/28/1986	32
30	Confirmed		12/13/2018	16:00:00	17:00:00	Alfred	Gaynor	2004676563	11/17/1967	50
31	Scheduled		12/13/2018	16:00:00	17:00:00	Israel	Keyes	2004676565	01/07/1978	38
32										

## New Calendar

1. From the New Calendar, click the **Export** button.

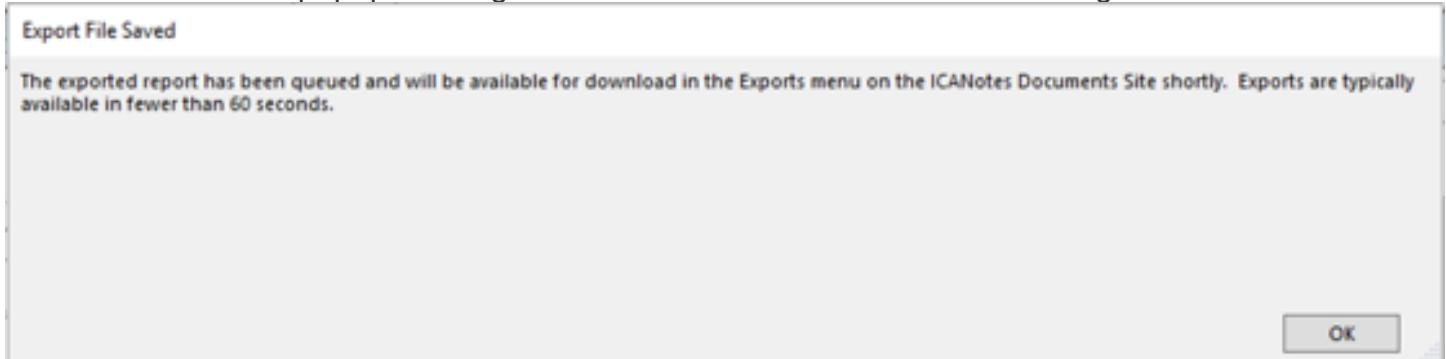
## ICANotes Servers Downtime/Emergency Procedure

2. Choose the date range. For this example, I am printing one day, 12/13/2018. Choose the status and clinicians that you want to print.



3. Once all of the selections have been made, click the **Export** button.

4. You will receive a popup message. Click the OK button to close the message.



5. Go to the Upload Site and log in using your ICANotes username and password.

# ICANotes Servers Downtime/Emergency Procedure

ICANotes Documents Login

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Login

User name  
jzepp

Password  
\*\*\*\*\*

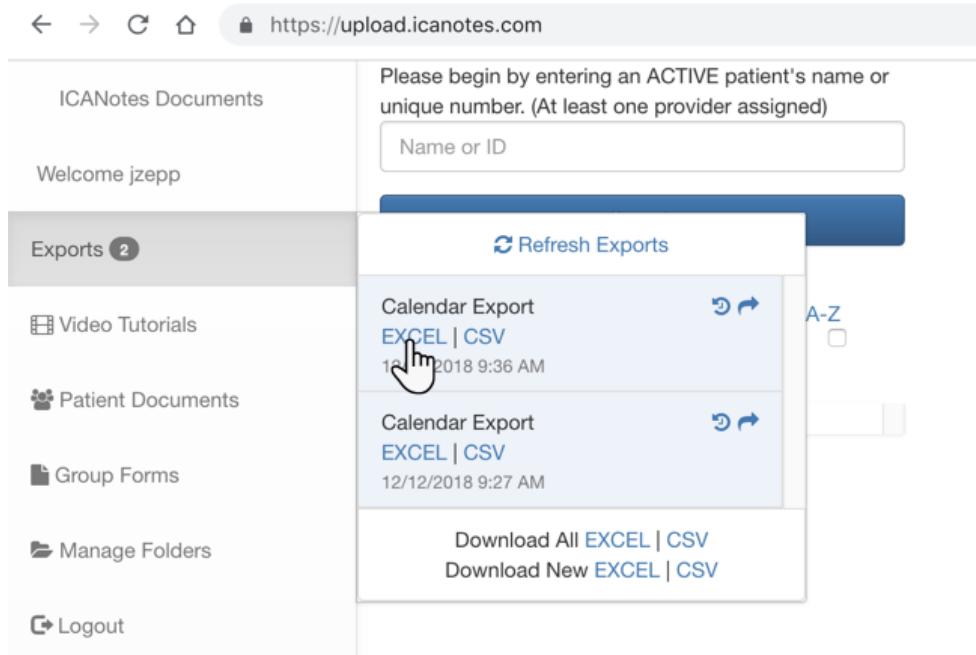
[Forgot Password?](#)

Remember me?

**Sign In**

6. On the left side, click the Exports link and then choose the report to export.

← → ⌂ ⌂ https://upload.icanotes.com



ICANotes Documents

Welcome jzepp

Exports 2

- Video Tutorials
- Patient Documents
- Group Forms
- Manage Folders
- Logout

Please begin by entering an ACTIVE patient's name or unique number. (At least one provider assigned)

Name or ID

Refresh Exports

Calendar Export EXCEL | CSV 12/12/2018 9:36 AM

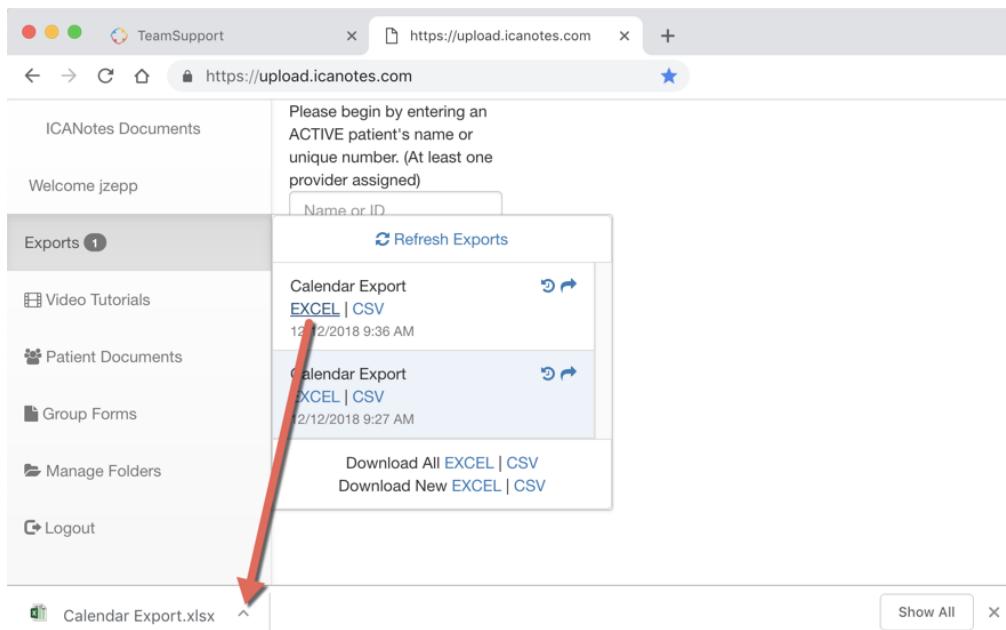
Calendar Export EXCEL | CSV 12/12/2018 9:27 AM

Download All EXCEL | CSV  
Download New EXCEL | CSV

A-Z

7. Open the exported report by clicking downloaded report on the bottom of the right.

# ICANotes Servers Downtime/Emergency Procedure



ICANotes Documents

Welcome jzepp

Please begin by entering an ACTIVE patient's name or unique number. (At least one provider assigned)

Name or ID:

Exports 1

Video Tutorials

Patient Documents

Group Forms

Manage Folders

Logout

Refresh Exports

Calendar Export EXCEL | CSV 12/12/2018 9:36 AM

Calendar Export EXCEL | CSV 12/12/2018 9:27 AM

Download All EXCEL | CSV

Download New EXCEL | CSV

Calendar Export.xlsx

8. When the report opens, it will be shown in Excel as selected. It can be printed from Excel.

	A	B	C	D	E	F	G	H	I	J
1	Status	Late	Date	Start Time	End Time	First Name	Last Name	Unique ID#	DOB	Age
2	Confirmed		12/13/2018	08:00:00	9:00:00	Kent	Brockman	2004684333	09/18/1968	49
3	Block Out		12/13/2018	08:00:00	17:00:00					
4	Block Out		12/13/2018	08:00:00	17:00:00					
5	Block Out		12/13/2018	08:00:00	12:00:00					
6	Scheduled		12/13/2018	08:00:00	9:00:00	Alice	Doe	2004684621	08/19/1984	34
7	Confirmed		12/13/2018	09:00:00	10:00:00	Linda	Belcher	2004690021	09/18/1968	49
8	Confirmed		12/13/2018	09:00:00	10:00:00	Mary	Bailey	2004684331	07/21/1973	45
9	Confirmed		12/13/2018	10:00:00	11:00:00	Bob	Belcher	2004690020	05/18/1967	51
10	Scheduled		12/13/2018	10:00:00	11:00:00	Charles	Burns	2004684335	06/25/1917	101
11						Barbara	Hudson	2004692406	02/14/1963	55
12						Wendell	Borton	2004684332	08/30/2008	8
13	Confirmed		12/13/2018	10:00:00	11:00:00	Charles	Albright	2004676557	08/10/1933	84
14	Confirmed		12/13/2018	11:00:00	12:00:00	Louise	Belcher	2004690024	10/26/2009	8
15	Confirmed		12/13/2018	11:00:00	12:00:00	David	Mason	2004676566	12/02/1956	59
16	Confirmed		12/13/2018	12:00:00	13:00:00	Tina	Belcher	2004690022	02/18/2005	13
17	Confirmed		12/13/2018	12:00:00	13:00:00	Cathy	T3st	1000010670492	01/10/1949	69
18	Block Out		12/13/2018	12:00:00	17:00:00					
19	Confirmed		12/13/2018	12:00:00	13:00:00	Edward	Edwards	2004676562	06/14/1933	85
20	Confirmed		12/13/2018	13:00:00	14:00:00	Bart	Simpson	2004689658	02/23/2007	11
21	Confirmed		12/13/2018	13:00:00	14:00:00	Steve	T3st2	1000010670452	01/05/1972	46
22	Confirmed		12/13/2018	13:00:00	14:00:00	Gene	Belcher	2004690023	10/10/2007	10
23	Confirmed		12/13/2018	14:00:00	15:00:00	Homer	Simpson	2004684328	02/28/1968	50
24	Scheduled		12/13/2018	14:00:00	15:00:00	Lisa	Test	1000010670496	01/08/1972	46
25	Confirmed		12/13/2018	14:00:00	15:00:00	Allison	Henderson	2004692409	02/14/1963	55
26	Scheduled		12/13/2018	15:00:00	16:00:00	Ted	Bundy	2004678417	11/24/1946	71
27	Confirmed		12/13/2018	15:00:00	16:00:00	Akira	Albright	2004684329	08/21/1985	33
28	Confirmed		12/13/2018	15:00:00	16:00:00	Jacqueline	Bouvier	2004684330	10/10/1925	91
29	Confirmed		12/13/2018	16:00:00	17:00:00	Test	Patient	2004689493ABC	06/28/1986	32
30	Confirmed		12/13/2018	16:00:00	17:00:00	Alfred	Gaynor	2004676563	11/17/1967	50
31	Scheduled		12/13/2018	16:00:00	17:00:00	Israel	Keyes	2004676565	01/07/1978	38
32										

## DrFirst Backup

You are able to login to DrFirst outside of ICANotes in the event of an ICANotes outage or performance issue but before deciding to do so it is **very important** to consider the following:

- Medications prescribed, stopped or changed outside of the ICANotes/DrFirst integration will not immediately sync back to ICANotes. When the system is restored to full access, a note will need to be generated for each patient a medication change was made for outside of ICANotes.

## ICANotes Servers Downtime/Emergency Procedure

This is the only way to accurately reflect medication changes that were made outside of ICANotes as a result of this downtime procedure.

- Logging in through the [DrFirst website](#) directly will require an additional username and password which can be obtained from the ICANotes Support team.
- If you are setup as an administrator in DrFirst, the DrFirst website will allow access to an Acct Mgmt (Account Management) section which allows you to create providers, send EPCS invites, reset passwords, disable or delete users, etc. We discourage administrators for accessing this area of the DrFirst website. ***Please be warned that as an administrator you are liable, from a billing standpoint, for any changes made.***

**Because the syncing of medications back to ICANotes from DrFirst does not occur when prescribing through the DrFirst website directly, ICANotes urges extreme caution if you decide to login to DrFirst directly as part of your downtime plan.**

If you decide to proceed, you will first need to contact ICANotes Support by telephone at 443-569-8778 to mention that you will be using the website to prescribe as a result of the ICANotes outage and to request your DrFirst login username and password. For security reasons, this information can only be shared over the phone and only with the **account owner**.