

# ICANotes Servers Downtime/Emergency Procedure

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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?](#)

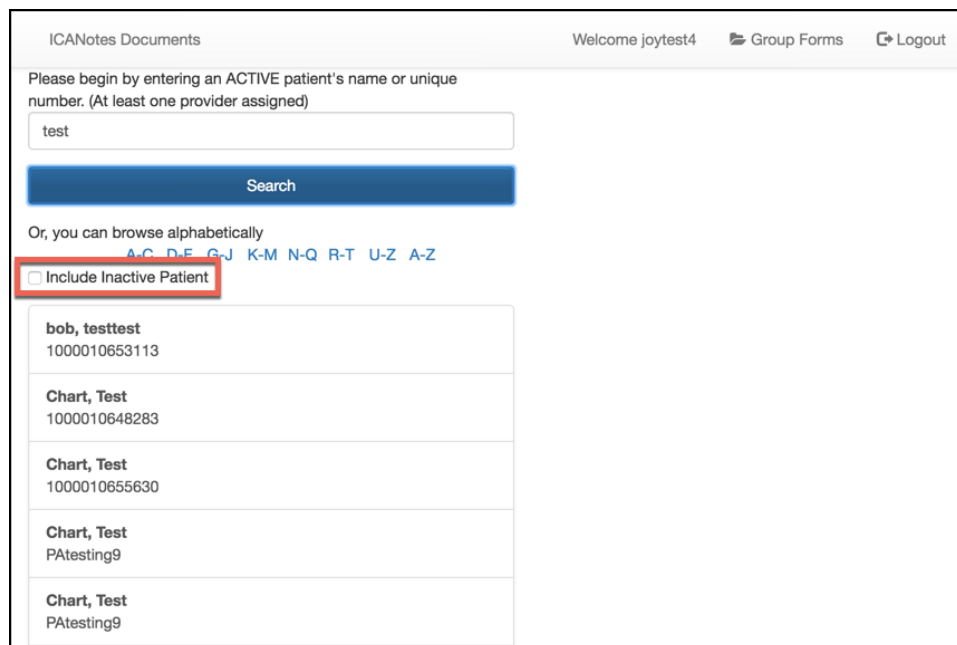
☐ Remember me?

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  Group Forms  Logout

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

test

**Search**

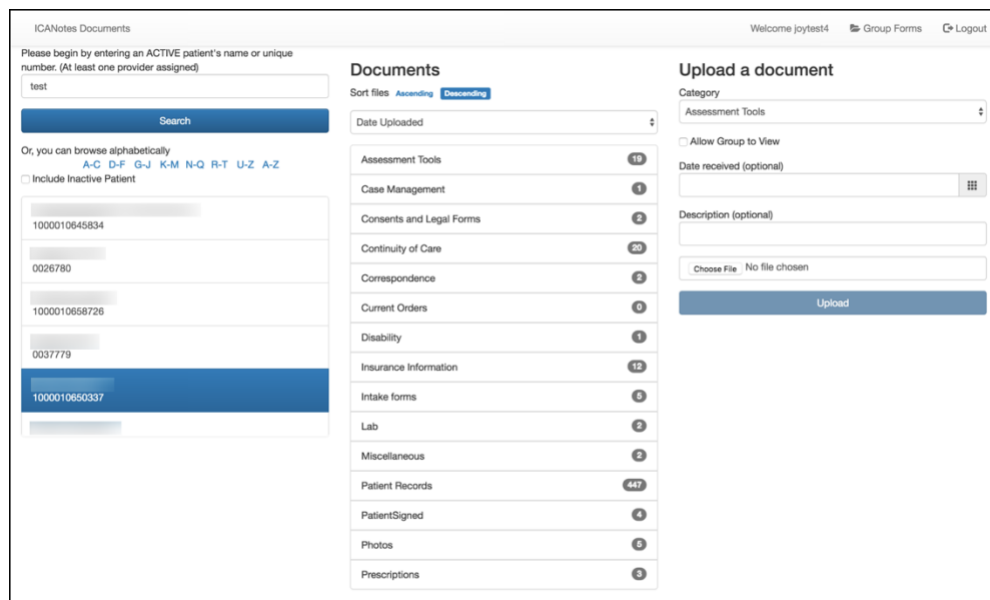
Or, you can browse alphabetically

A-C D-E G-J K-M N-Q R-T U-Z A-Z



☒ Include Inactive Patient

<b>bob, testtest</b> 1000010653113
<b>Chart, Test</b> 1000010648283
<b>Chart, Test</b> 1000010655630
<b>Chart, Test</b> PATesting9
<b>Chart, Test</b> PATesting9

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



ICANotes Documents

Welcome joytest4  Group Forms  Logout

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

test

**Search**

Or, you can browse alphabetically

A-C D-E G-J K-M N-Q R-T U-Z A-Z

☐ Include Inactive Patient

1000010645834
0026780
1000010658726
0037779
<b>1000010650337</b>

### Documents

Sort files **Ascending** **Descending**

Date Uploaded

Assessment Tools	19
Case Management	1
Consents and Legal Forms	2
Continuity of Care	20
Correspondence	2
Current Orders	6
Disability	1
Insurance Information	12
Intake forms	3
Lab	2
Miscellaneous	2
Patient Records	437
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

**Upload**

# ICANotes Servers Downtime/Emergency Procedure

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

ICANotes Documents

Welcome joytest4 Group Forms Logout

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

test

Search

Or, you can browse alphabetically

A-C D-F G-J K-M N-Q R-T U-Z A-Z

☐ Include Inactive Patient

AAAAA, AAAAAA  
1000010645834

Aalbers, Dustin  
003780

Aaronson, Alpha  
1000010658726

Abbott, Gage  
0037779

Abdul, Paula E.  
1000010650337

Abreu, Fernanda

**Documents**

Sort files **Ascending** Descending

File Description

Assessment Tools 18

Case Management 1

Consents and Legal Forms 2

Continuity of Care 20

Correspondence 3

Current Orders 3

Disability 1

Insurance Information 12

Intake forms 3

Lab 2

Miscellaneous 2

Patient Records 447

Wellness Assessment Youth (Spanish) - 6/6/2016  
file 66201640309PM.pdf  
255.00KB  
scotttest4 - 6/5/2016

Wahler Self-Description Inventory - 10/4/2016  
file 1042016104224AM.pdf  
209.00KB  
scotttest4 - 10/3/2016

Uniform Treatment Plan Form(2016) - 9/15/2016  
file 915201615239PM.pdf  
274.00KB  
scotttest4 - 9/14/2016

Uniform Treatment Plan Form(2016) - 9/14/2016  
file 9142016104139AM.pdf  
156.00KB  
scotttest4 - 9/14/2016

Treatment Plan - 9/21/2016  
file 921201625311PM.pdf  
108.00KB  
janinastest4 - 9/20/2016

Upload a document

Category  
Assessment Tools

☐ Allow Group to View

Date received (optional)

Description (optional)

Choose File No file chosen

Upload

**Documents**

Date Uploaded

Date Received

✓ File Description

File Name

Assessment Tools 18

## 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."

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.

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

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-I](#) [K-M](#) [N-Q](#) [R-T](#) [U-Z](#) [A-Z](#)

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-I](#) [K-M](#) [N-Q](#) [R-T](#) [U-Z](#) [A-Z](#)

**bob. testtest**  
1000010653113

**Brother, Testimiss**  
136

**Chart, Test**  
1000010648283

**Chart, Test**  
1000010655630

**Chart, Test**  
PAtesting9

**Chart, Test**  
PAtesting9

**Clinton, Bill**  
Test40001

**Dedo, Alanna**  
test1234

**Dohstest, James**  
1000010658471

**Dohstest, John**  
1000010658469

### 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 \(no files\)](#)

5. The image will open in another browser window.

# ICANotes Servers Downtime/Emergency Procedure

Chad Signature  
Internal Chao  
815 Pike Lane  
555-234-0987  
555-234-0980

Chart, Test

date of birth: 1/1/2001  
patient ID: 100001000000  
Alt. Patient ID:

Progress Note

Test's behavior has been stable and uneventful and he denies any psychiatric problems or symptoms. He reports no side effects and none are in evidence. Problem Pertinent Review of Symptoms/Associated Signs and Symptoms. Psychotic, depressive, and anxiety symptoms are denied.

Return 1 week, or earlier if needed.

90832 Psychotherapy 30 min. - 1P

Chad Signature

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

Back Alt+Left Arrow

Forward Alt+Right Arrow

Reload Ctrl+R

Save as... Ctrl+S

Print... Ctrl+P

Translate to English

View page source Ctrl+U

View page info

Rotate clockwise Ctrl+]

Rotate counterclockwise Ctrl+[

Inspect element Ctrl+Shift+I

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  button.

The screenshot displays the ICA Notes software interface. On the left, a patient information panel for Borton, Wendell (#2004684332) is visible, including options to view history, accounts, and charts. The main area shows a schedule for Thursday, December 13, 2018, with a time slot filter set to 'W50'. The schedule is organized into columns for different locations: Anna - Hospital, Joy, Jane - Clinic, Jane - Hospital, and Emma. The time slots range from 8:00 am to 4:00 pm. The grid shows various appointments with names and durations. For example, at 8:00 am, there is a 'Block Out (BO) 9:00' at Anna - Hospital, a 'Follow Up (C) 1:00' with Brockman, Kent at Joy, and a 'Follow Up (S) 1:00' with Doe, Alice at Jane - Clinic. The interface also includes a top navigation bar with options like 'new', 'print', 'reports', 'export', 'refresh', 'chart room', 'back to ICA Notes', and 'help'. A mouse cursor is pointing at the 'help' button.

Event Export Thursday, December 13, 2018

## Event Export Options

date range

status  
[select all](#)

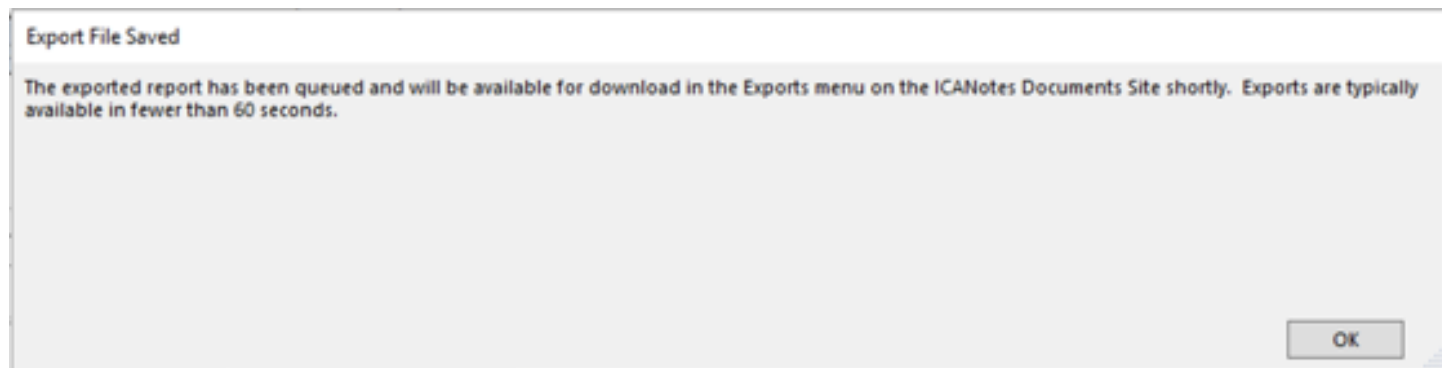
- ☒ Scheduled
- ☒ Confirmed
- ☐ No Show
- ☐ Attended
- ☐ Rescheduled
- ☐ Cancelled
- ☒ Available
- ☒ Block Out

clinician  
[select all](#)

- ☒ Anna - Clinic
- ☒ Anna - Hospital
- ☒ Emma
- ☒ Jane - Clinic
- ☒ Jane - Hospital
- ☒ Joy

Export

# ICANotes Servers Downtime/Emergency Procedure



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

**ICANotes Documents Login**

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Login

User name

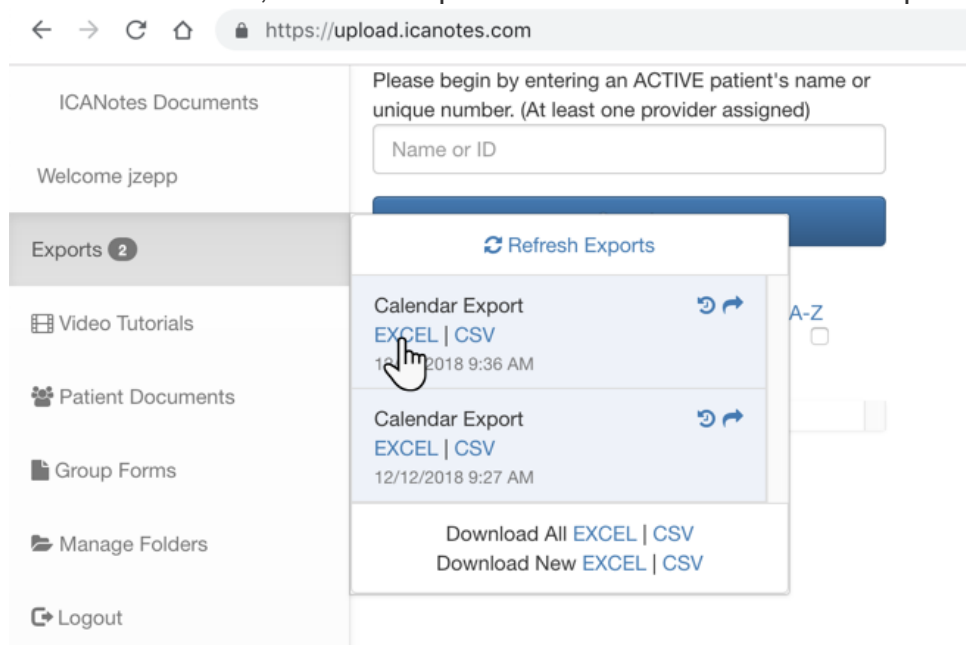
Password

[Forgot Password?](#)

☐ Remember me?

Sign In

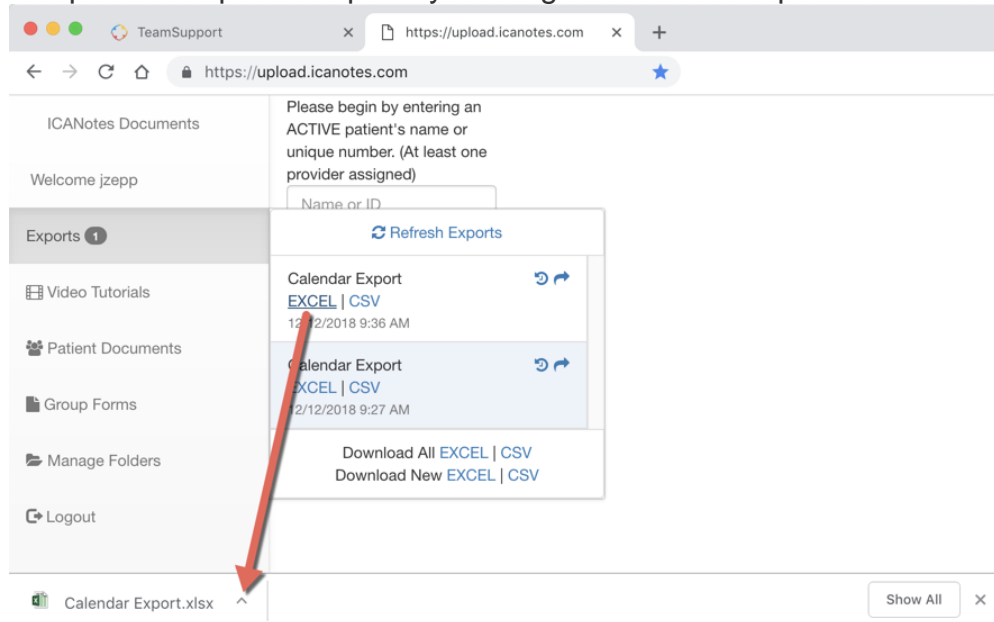
6. On the left side, click the Exports link and then choose the report to export.





# ICANotes Servers Downtime/Emergency Procedure

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



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

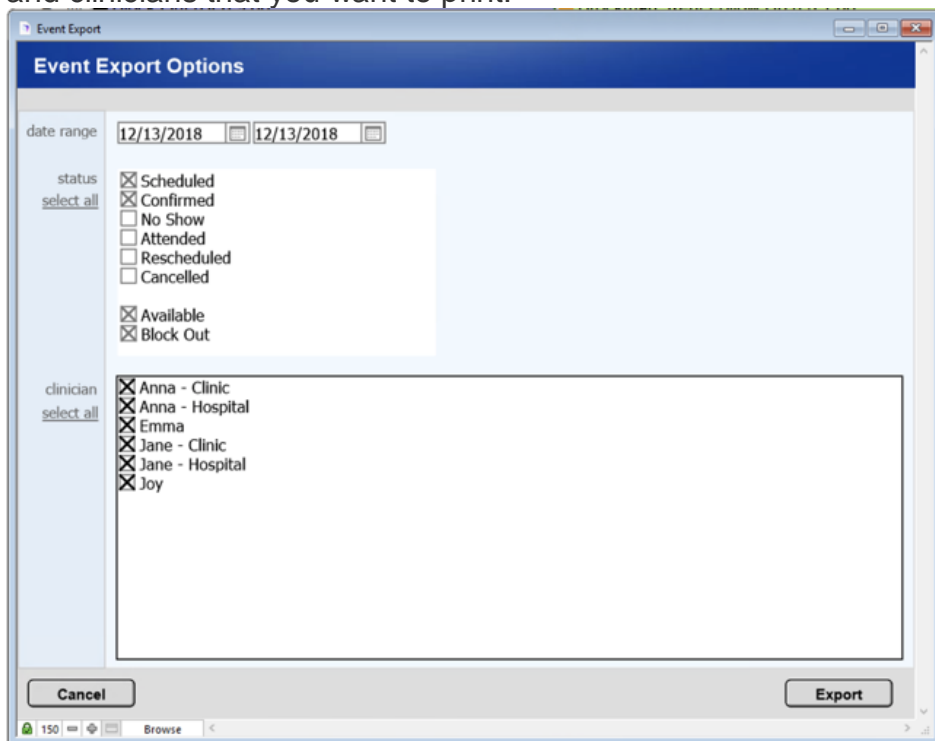
	A	B	C	D	E	F	G	H	I	J	
1	Status	Late	Date	Start Time	End Time	First Name	Last Name	Unique ID#	DOB	Age	SSN
2	Confirmed		12/13/2018	08:00:00	9:00:00	Kent	Brockman	2004684333	09/18/1968	49	
3	Block Out		12/13/2018	08:00:00	17:00:00						
4	Block Out		12/13/2018	08:00:00	17:00:00						
5	Block Out		12/13/2018	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	555-
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	555-
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.



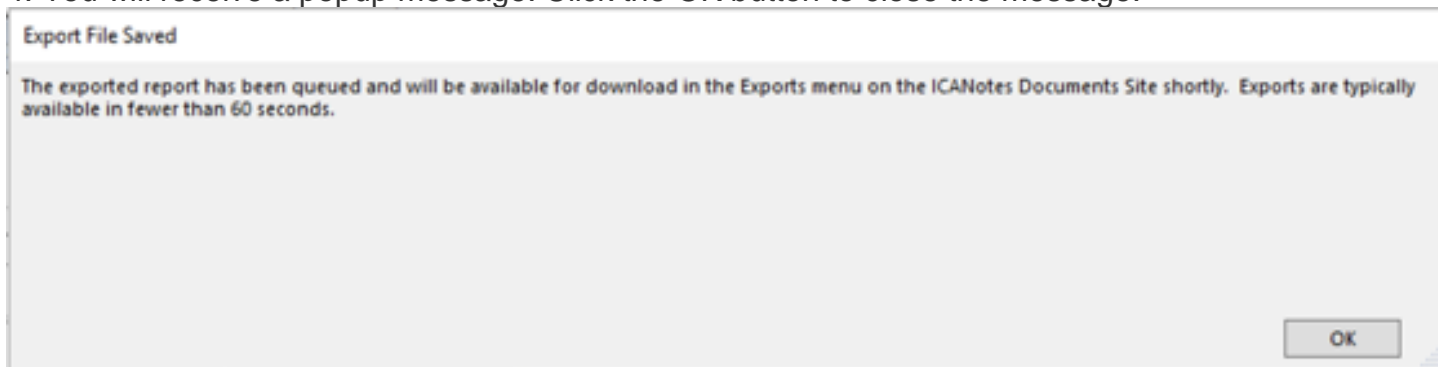
The 'Event Export' dialog box is shown with the following options:

- date range:** 12/13/2018 to 12/13/2018
- status:**
  - ☒ Scheduled
  - ☒ Confirmed
  - ☐ No Show
  - ☐ Attended
  - ☐ Rescheduled
  - ☐ Cancelled
  - ☒ Available
  - ☒ Block Out
- clinician:**
  - ☒ Anna - Clinic
  - ☒ Anna - Hospital
  - ☒ Emma
  - ☒ Jane - Clinic
  - ☒ Jane - Hospital
  - ☒ Joy

Buttons: Cancel, Export

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.



**Export File Saved**

The exported report has been queued and will be available for download in the Exports menu on the ICANotes Documents Site shortly. Exports are typically available in fewer than 60 seconds.

OK

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

#### Password

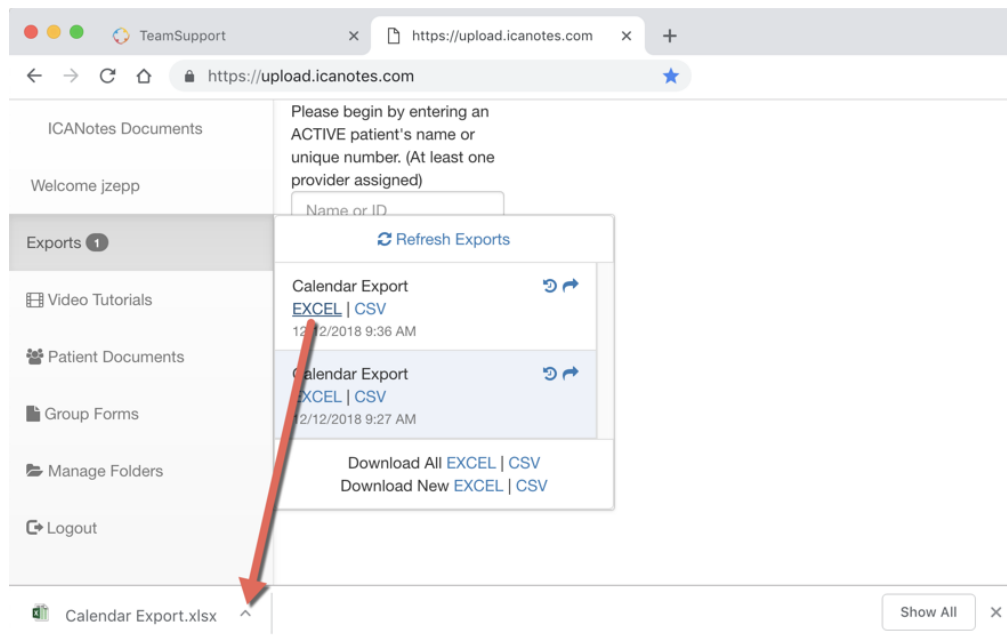
[Forgot Password?](#)☐ Remember me?[Sign In](#)

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

The screenshot shows the ICANotes Documents application interface. On the left is a sidebar with navigation links: ICANotes Documents, Welcome jzepp, Exports (with a badge '2'), Video Tutorials, Patient Documents, Group Forms, Manage Folders, and Logout. The main content area has a header with navigation icons and the URL 'https://upload.icanotes.com'. Below the header, there is a prompt: 'Please begin by entering an ACTIVE patient's name or unique number. (At least one provider assigned)' with an input field labeled 'Name or ID'. A modal window titled 'Refresh Exports' is open, displaying a list of export options. The first two options are 'Calendar Export' with 'EXCEL | CSV' links and timestamps '12/12/2018 9:36 AM' and '12/12/2018 9:27 AM'. At the bottom of the modal are links for 'Download All EXCEL | CSV' and 'Download New EXCEL | CSV'. A mouse cursor is pointing at the first 'Calendar Export' option.

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

# ICANotes Servers Downtime/Emergency Procedure



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	SSN
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	
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24	Scheduled		12/13/2018	14:00:00	15:00:00	Lisa	Test	1000010670496	01/08/1972	46	--
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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**.