Profile EMR Downtime Procedures (Help File)

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2 Introduction

This document outlines the procedures for staff to follow in the event of Profile EMR downtime.

A downtime refers to the unavailability of the EMR system. It could be a scheduled event, as for a system upgrade, or unscheduled, when Profile EMR functionality is unexpectedly impacted and therefore EMR is not available.

3 Downtime Coordination and Reporting

Each site should designate a representative to act as the Downtime Coordinator (e.g. EMR Super Users). This representative will ensure downtime tools are in place, and be the primary contact person that the Help Desk will communicate with during an unscheduled downtime. This includes assisting the Help Desk in determining the problem, helping to communicate the downtime procedures to the staff at your site and checking to ensure that EMR is up and running once the Help Desk has resolved the problem.

If a user or team are the first to identify when an unscheduled downtime has occurred, the clinic Super User/Manager should call Tech Services at 604-875-4334 or email Servicedesk@vch.ca as soon as possible. As soon as an unscheduled downtime is reported, EMR users will receive notification of the downtime via whatever communication methods are available and functioning, ie: email or telephone.

4 Scheduled Downtime

A scheduled downtime occurs when Profile EMR is deliberately made unavailable in order to complete technical work on the system and is therefore temporarily not available. Clinics and technical support staff have prior notification when the system will not be available. Scheduled downtimes are executed only when necessary to improve the system and are scheduled with a minimum of 7 days' notice, where possible.

Typically there will be two stages to a Scheduled downtime:
Stage 1: the EMR team takes a snapshot of the live environment and reproduces it in the downtime environment. During this time there will be **NO** access to any EMR environment. **Documentation will be on paper**. The EMR team aims to have this stage completed overnight, when there are only minimal users on EMR.

Stage 2: The Downtime environment is available as a READ-ONLY copy of the live environment. For clinical documentation, there is a **Downtime Encounter form** for entering encounter notes, creating and printing prescriptions, requisitions, specimen labels, and reviewing earlier downtime encounter notes.

To access the EMR Downtime Environment, sign into Citrix Portal, then click on the IntraHealth folder and then the **VCH PHC EMR – Downtime** icon.

Refer to the Downtime Encounter Form HELP FILE for detailed instructions.

4.1 Prior to the Scheduled Downtime

Prior to the scheduled downtime, all EMR users will receive notification of the downtime via email (IT Broadcast). Emails will include the date and duration of the downtime.

Activity	Manual Steps (Instead of EMR during Downtime)	Who
Notification	Print and post a downtime notice near each workstation	Downtime Coordinator
Downtime Preparation	Ensure Downtime Procedure Box is updated with relevant contents	Downtime Coordinator
Appointments	Print day sheets for booked appointments	Admin Support

5 Unscheduled Downtime

During an unscheduled downtime, the downtime environment and downtime form may or may not be available. **If the downtime environment is available, the procedures are the same as for a scheduled downtime. If the environment is not available, documentation will have to take place outside of EMR, to be entered/transcribed/scanned into the live environment once it is available.**

5.1 Prior to an Unscheduled Downtime

The Downtime Coordinator is responsible for ensuring that the clinic's downtime box is prepared for the possibility that staff may have to go to paper for ordering and documentation.

Refer to the Profile EMR Downtime Preparation Guide for a checklist on how to ready your site for an unscheduled downtime (Appendix 1).

6 Overview of Admin and Clinical Functions during Downtime

Activity	Manual Steps	Who
Registration	• No change, continue to enter information in PARIS, and bring client over into EMR once it is available	Admin Support
Scheduling, Walk–ins	• For a **scheduled downtime**, use the printed day sheets to mark clients as they arrive • For an **unscheduled downtime**, or clients without a booked appointment, manually enter client info on the Sign Up sheet for Scheduling and Walk-ins • Keep a copy of the sheet to enter into EMR when available	Admin Support

Activity	Manual Steps	Who
Encounter Notes Prescriptions Requisitions	• **If the downtime environment is available**, use the downtime encounter button and downtime form – refer to the Downtime Encounter Help File for detailed instructions • **If the downtime environment is not available**, enter info on data collection sheet, to be transcribed into EMR when it is available. Use paper Rx forms and paper requisitions forms from the Downtime Box	All Clinical Staff
Lab Results/ /Pharmanet	• Log into CareConnect to search for a specific client's lab results • Log into Medinet to search for a specific client's Pharmanet profile • Results may also be available for review in the Downtime environment, but cannot be signed or annotated	Clinical staff

7 Recovery Procedures Following a Downtime

Following any downtime, all EMR users will receive notification that EMR is again available via email. This email will also include any relevant information related to the downtime.

If the Downtime environment and Downtime Encounter form were used, the downtime encounter information will be automatically imported into Profile EMR once the downtime is over, and marked as "Unresolved."

Paper documents have to be scanned or transcribed into EMR per your clinic prodecures.

Once the EMR system is available again, stop manual procedures and begin to enter the information into EMR.

The objective is to have all the information entered into EMR as soon as possible, ideally within 24 hours of the recovery of the downtime.

Activity	EMR Steps ***All information should be entered into EMR as soon as possible following a downtime**	Who *** Must be completed by the appropriate staff member to prevent errors when entering information into EMR**
Scheduling, Walk – ins	• Enter all data from Sign Up sheet/s	• Admin
Visit Information	• Enter all visit information from Data Collection sheet • Scan and sign off Progress Notes (written or electronic) to client record • Enter "downtime encounter note" and note what document(s) was scanned to the client record	• Admin
Active Problems Service Codes Diagnosis Codes Referrals Recalls	• Enter all data from Data Collection sheet/s	• **Clinical**
Prescriptions	• Enter all prescription information from photocopies or data collection sheet	• **Prescribing Clinicians**
Lab Results	• Annotate paper lab results as needed • Sign off paper lab results • Scan, attach and sign off lab results to client record	• **Clinical** • **Clinical** • **Admin**

8 Appendix 1: EMR Downtime Preparation Guide

Every effort has been made to avoid a downtime of the EMR system, however in the event that a downtime does occur, each site must be prepared. This is similar to disaster planning and preparedness for your site. The following guide is a checklist to help with your Downtime Preparation:

☐ **Select an EMR Downtime Coordinator for your site.**

Responsibilities include:

- Completing the steps listed on this Downtime Preparation Guide
- Updating the Downtime Information for your site on a regular basis
- During an unscheduled downtime, acting as the primary contact person with the Help Desk. For example, assisting the Help Desk in determining the problem, communicating the downtime procedures to the staff at your site and checking to ensure that EMR is up and running once the Help Desk has resolved the problem.

☐ **Create an EMR Downtime Box for your site and keep in a central, easily accessible area. Contents should include:**

- Blank copies of Client Sign-in sheets (see attached document below)
- Blank copies of Data Collection Sheets (see attached document below)
- Paper progress notes
- Paper copies of lab requisitions
- Prescription pads
- Paper requisitions for U/S, x-ray
- Blank client label stickers

The contents of the above box are for downtime procedures ONLY

☐ **Place a copy of the downtime procedures in the box.**

- The downtime procedures describe what to do prior to, during, and following a downtime of the EMR system. The latest version of the downtime procedures can be found on the EMR Share point Site

☐ **File copies of all the manual downtime forms for your program area.**

- Blank forms have been created to help capture the information that would normally be entered into EMR, such as scheduling, activity recording, and clinical functions.

☐ **Review the EMR Downtime procedures with staff at your site on a regular basis.**

☐ **Annually - update the downtime information (procedures and manual downtime forms) in your Site's Downtime Manual and review the EMR Downtime procedures with staf**