Cegedim Primary Care Solutions Business Continuity User Guide

We recommend you print out this guide and keep it in a safe place in case you need it in the unlikely event of your clinical system being unavailable.

Version 1.8

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Contents

Business Continuity

Business Continuity provides a valuable service in the unlikely event of your clinical system being unavailable. This could occur due to:

- No internet access
- Your surgery experiencing a loss of power
- Your computer system being down

In the event of an internet failure, for example, a business continuity service enables you to log on to your computer and carry on accessing and recording clinical data. When the fault is rectified, any information recorded automatically uploads to your clinical system the next time you log on to it.

If there is a power outage you can use **Vision Anywhere** on **Windows**, **iOS** or **Android** mobile devices until your power is restored.

Please be aware of the following:

- The **Vision Anywhere Business Continuity** solution does not replicate full **Vision 3** functionality, however, it provides read and write access to key clinical data, acting as an 'insurance policy' for your practice.

- If you have a local server, the **Vision Anywhere Business Continuity** solution does not replace the need for you to run and maintain a robust back up procedure.

- The **Vision Anywhere Business Continuity** solution only downloads patient records when you log on to **Vision Anywhere**, so a part-time member of staff or someone who has been on leave, may not have a full seven days in advance available.

- The following functionality is unavailable when working offline, for example, if there is an internet failure:

  - **Book appointments**
  - **Change which service/role you have logged in with, or switch appointments book**
  - **Print prescriptions**
  - **Prescribing Decision Support**
  - **Repeat Medication Management**
  - **Test Requesting** - The ability to launch external system is not available without internet access
  - **eMED3** - Restricted, only 'Issued by Hand' eMED3s can be created
  - **Download new templates or calculators**
  - **Referral Letters** - Your templates are not accessible
  - **Correspondence**

Your **Vision 3** appointments lists can also be backed up to local computers and printed as required, see **Appointments Back up - Hosted Server** on page **10** or **Appointments Back up - Local Server** on page **15** for details.

Vision Anywhere for Business Continuity

Vision Anywhere is set by default to automatically start when you log on to your computer. This is designed to prompt you to log on to **Vision Anywhere** which allows business continuity processes to run.

> ⓘ **Important** - You must log on to Windows as yourself, this facility does not work with shared Window log ins.

Clinicians

Once you log into **Vision Anywhere** and select your appointments book, the records for patients in your appointments list, for seven days either side of today, automatically download. Although you can see this happening, the **Cloud** next to a patient name in your appointment list turns into a **Spinner** and then into an **Option menu**, it has no impact on you using **Vision Anywhere** in the usual way:

- Awaiting Download

- Downloading

- Downloaded
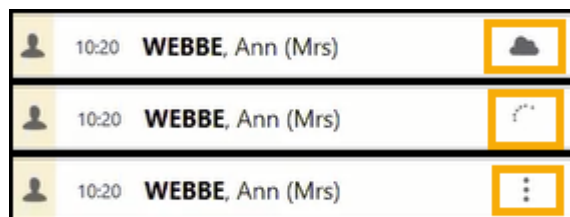
Administrators

Once you log into **Vision Anywhere**, to initiate a data download, you must select an appointment book. Only the patients on the selected list download, if you select a different appointment list, the previous downloaded list is overwritten and the newly selected list now downloads.

> 💡 **Training Tip** - Please be aware, patient details only download on to the device you are logged in to.

Not using Vision Anywhere today?

You must log in every day to ensure downloaded patients are kept up to date. After logging in, if you do not want to use **Vision Anywhere** at the moment, close it using the **X** in the top right corner. This leaves **Vision Anywhere** running in your system tray which allows the business continuity solution to continue running in the background.

To check if you are logged in, select the **System Tray Arrow** and right click the **Vision** logo:
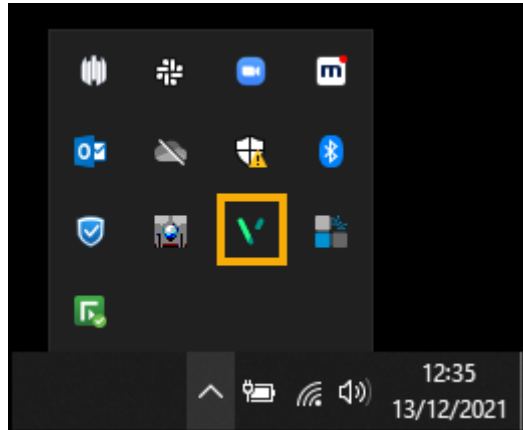
- If you are logged in and **Vision Anywhere** is open and running, **Vision Anywhere** - **Quit** is active and **Open** is inactive:
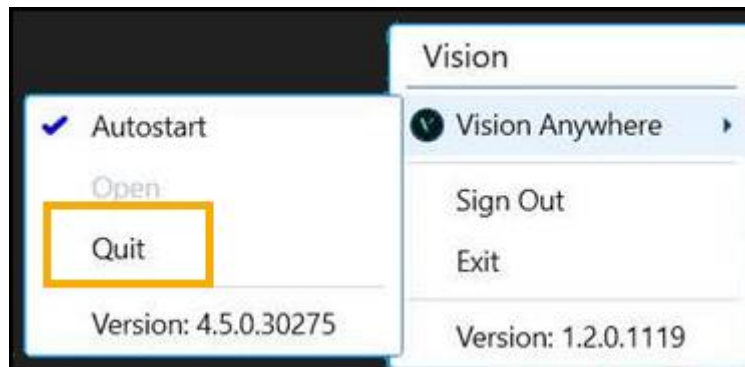
> **Note** - Providing you selected an **Appointment Book** when you logged in, **Business Continuity** is running.

- If you are logged in but **Vision Anywhere** is closed, **Vision Anywhere** - **Open** and **Quit** are both active:

> 🖊️ **Note** - Providing you selected an **Appointment Book** when you logged in, **Business Continuity** is running.

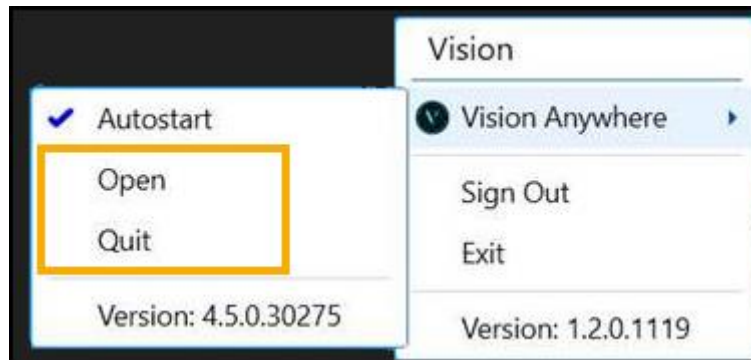- If you did not log on to **Vision Anywhere** when prompted, or you have since selected **Exit** from **System Tray** - **Vision**, neither **Open** or **Quit** are active:
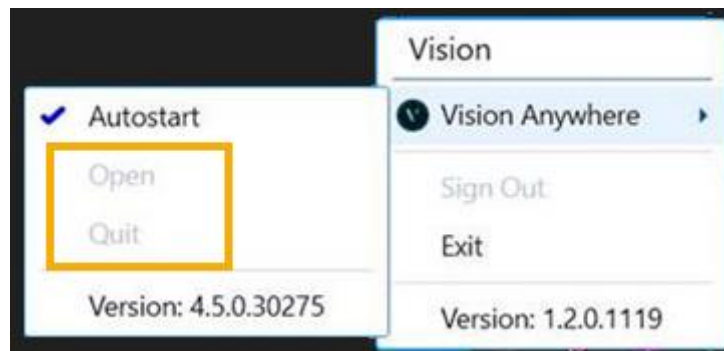
> ⓘ **Important** - **Business Continuity** is not running.

Updating Vision 3

When connectivity to **Vision 3** is restored you must log in to **Vision Anywhere**, this triggers the upload of the recorded consultations which updates your **Vision 3** system. Please check all **Encounters** are closed, if an encounter is left open the details are not sent to **Vision 3**.

> 🖊️ **Note** - Any open **Encounters** or **Encounters** saved on your pc are automatically deleted after 90 days.

Patient Record Availability

Downloaded Records

Each time you log on to **Vision Anywhere** and choose your appointment book, all the patients who have appointments seven days either side of today, in the selected book, automatically download in the background.

These patient records, along with any patient records you manually download are available for you to view and record clinical data in the event of a disaster scenario.

It is strongly recommended that each user logs into **Vision Anywhere** on a daily basis, to trigger the automatic download.

Disaster Scenarios

The availability of patient records varies depending on the nature of the fault:

- **No internet access** - If your internet connection is faulty your practice cannot connect to the internet and therefore the data centre. As detailed above downloaded records are available.

  If you wish to view the record for a patient who has not been downloaded, these are available via **Vision Anywhere** mobile (subject to 3G / 4G coverage), which connects directly to the data centre.

  Should your practice have Wi-Fi that is independent of the internet connection that has failed, if you connect to this and log into **Vision Anywhere** all current patient records are available.

- **Vision 3 System Unavailable** - In the rare event of your **Vision 3** system being unavailable, access to previously downloaded records is available as detailed above.

- **Data Centre Issue** - The hosting of your **Vision 3** system is highly resilient, with dual centres which offer live replication and fail over. In the event of one of the data centres failing, the other data centre takes over, you may experience a short delay whilst this happens.

  In the interim access to previously downloaded records is available as detailed above.

- **Power Cut** - If there is a disruption to the power supply into the practice building, **Vision Anywhere** mobile (subject to 3G/4G coverage) provides live access to all your current patient records.

> **Note** - When your system becomes available, next time you log onto **Vision Anywhere** all the closed **Encounters** automatically write back to **Vision 3**.

Summary of Record Availability in Vision Anywhere Business Continuity

Available	Internet Outage	Vision 3 Unavailable	Data Centre Issue	Power Cut
All current patient records	No * Unless alternative Wi-Fi available	No	No	No *
Downloaded patient records	Yes *	Yes*	Yes *	No *

- **No *** - All current patient records are available from **Vision Anywhere Mobile**.

- **Yes *** - You need to log into **Vision Anywhere** daily and select your appointment book to trigger the automatic download of the patient records in your chosen appointment book, this is for seven days either side of today.

Saved Patient Encounters

These records are encrypted and stored locally on your device, they are not available from any other device. If you add data to a patient record, you must close the Encounter and then **Vision Anywhere** and ensure you log onto **Vision Anywhere** on the same device within 90 days to trigger the upload to your **Vision 3** system, otherwise the data is deleted.

The data is also deleted if you forget your password.

Appointments Back up - Hosted Server

To provide access to your appointment list in the case of a network problem, **Vision 3 Appointments** and **Appointments** release **3.2** onwards have an automatic text file backup available. We recommended you run the backup on two workstations, usually a front office workstation and a back office workstation. It is important that the backups do not run at the same time.

> **ⓘ** **Important** - **Appointments** must be open for an automatic backup to take place.

To enable the back up of **Appointments** to a local drive you must first configure your remote desktop connection to allow access. You can then configure **Appointments** to back up to the local computer.
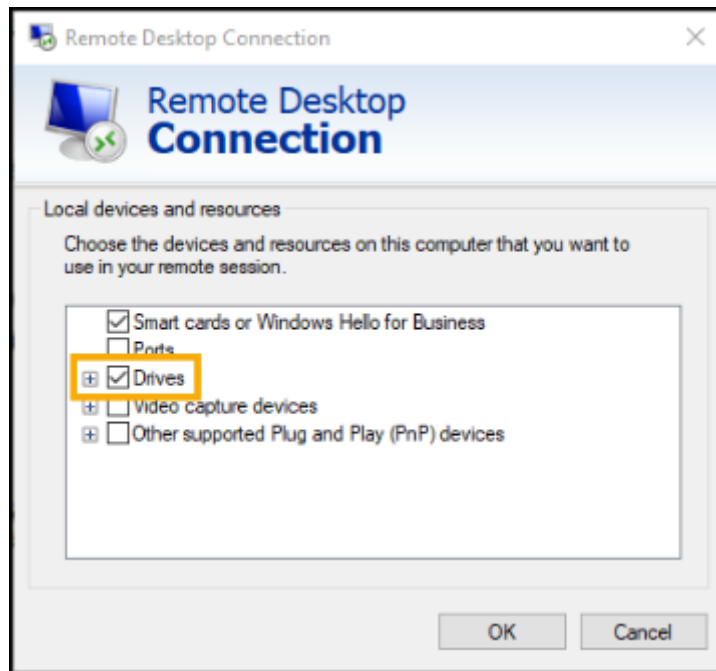
> **✎** **Note** - In Scotland this should be set up on your behalf.

To configure the remote desktop to access the local drive:

1. From your Windows desktop screen, right click on the **Remote Desktop** icon and select **Edit**.
2. The **Remote Desktop Connection** screen displays, select the **Local Resources** tab:
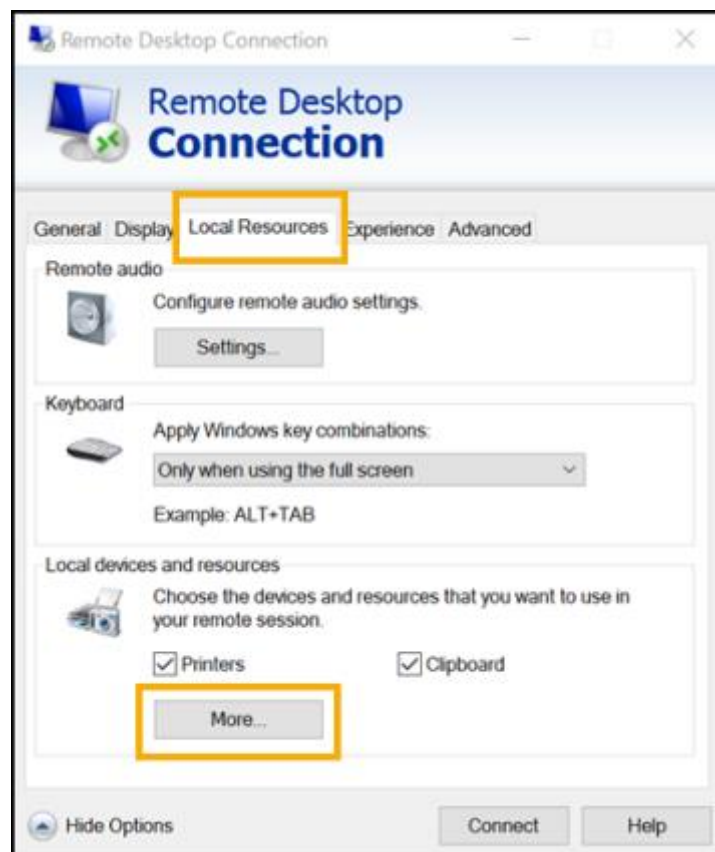
3. Select **More** and then tick **Drives**:

4. Select **OK** to save.
5. Now, select the **General** tab.
6. Select **Save As** and the file name **Remote Vision.rdp** displays, select **Save**.
7. You are prompted to replace the existing file, select **Yes**.

To create a new folder on your C drive:

1. From the Windows menu select **File explorer**.
2. Right click on **Local Disk (C)** and select **New - Folder**.
3. Enter a name in **New Folder**, for example, '*BackUp*'.
4. Press **Return** on your keyboard and the new directory saves under the C drive.

Once you have configured the remote desktop on the computer and created a new folder, you can activate the **Appointments** back up on both workstations:

Please refer to the version of **Appointments** you use below:
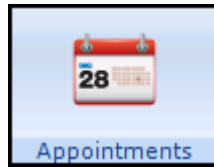
Vision 3 Appointments

1. From the **Vision 3 front screen**, select **Appointments - Maintenance - System Constants**.
2. Select the **Backup** tab:

Complete as follows:

- **From this workstation** - Tick, to select this workstation.
- **Interval** - Set to 15 minutes on the front office workstation and 59 minutes on the back office workstation.
- **File name** - Change to '\\tsclient\c\BackUp\appt_bak.txt'.
- **Backup days after today** - Select how many days ahead you wish to backup, this ranges from 1-10 days, the recommendation being one day on the front office workstation and three days on the back office workstation.
- **Order backup file by date** - Tick to list appointments in date order.
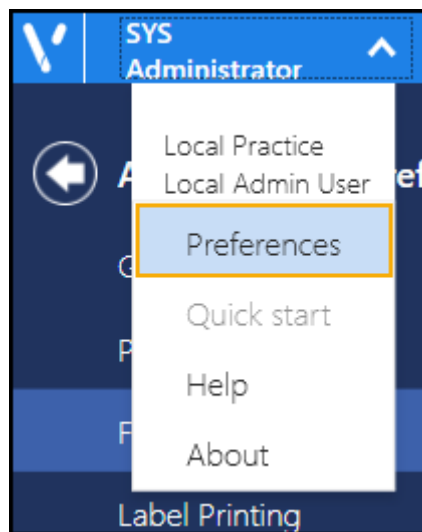
4. Select **OK** to save.

To access the backup, navigate to C:\BackUp on your local pc and the appt_bak.txt is available.

Appointments **(Release 3.2 onwards)**

1. From the **Vision 3** front screen, select **Appointments** , or from your desktop, select **Appointments** and log in.

2. Select the arrow next to you name and select **Preferences**:

3. Select **Backup** and the **Backup Appointments** screen displays:

Complete as required:

- **Folder name** - Select **Choose Folder** to select where you want your backup to store. Select **Clear** to clear the current location.

  If a drive is no longer available an error message '*Selected backup location (file_location) is not available or cannot be written to. Please select a new backup folder. If you select to continue without backup then you may be prompted again when next opening Appointments.*' displays. Select from:

  - **Try Again** - Select to try the same location.
  - **Change backup folder** - Select to open the **Browse for Folder** screen and choose a new backup folder.
  - **Continue without backup** - Select to continue without a backup. Until a backup is set, you are prompted each time you log into **Appointments**.

- **Backup file type** - Select whether to output the backup as a PDF (printable) or a CSV (Microsoft Excel) file.
- **Take a backup every** - Select the backup schedule in minutes from the available list.
- **Show Comments** - Tick to include **Appointment** comments in the backup file.

5. Select the **Back arrow** to save and close the **Appointments Preferences** screen.

The backup file contains one week of appointment data going forwards, including the current date. Each time a backup is taken the previous file overwrites.

> See Exporting Appointments for Business Continuity in the **Appointments Help Centre** for more details.

> **Training Tip** - Optionally, right click on the file and select **Create shortcut**, this can be placed on the desktop for easy access.

> **Note** - **Appointments** must be open for the back up to take place.

Appointments Back up - Local Server

If you have your own server, refer to the version of **Appointments** you use below:
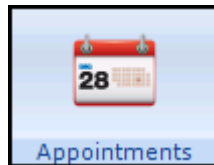
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3. Complete as follows:

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    - **Interval** - Set to 15 minutes on the front office workstation and 59 minutes on the back office workstation.

    - **File name** - Change to c:\appt_bak.txt.

    - **Backup days after today** - Select how many days ahead you wish to backup, this ranges from 1-10 days, the recommendation being one day on the front office workstation and three days on the back office workstation.

    - **Order backup file by date** - Tick to list appointments in date order.
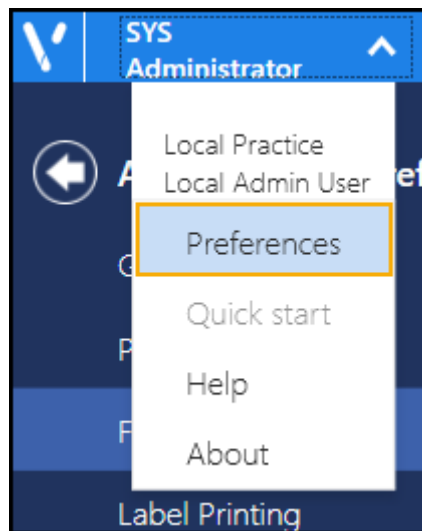
4. Select **OK** to save.

If you now navigate to C:\ on your local pc, the appt_bak.txt is available.

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> **Note** - **Appointments** must be open for the back up to take place.

Additional Information

For details about setting up staff, logging in and navigating **Vision Anywhere** see:

- **Vision Anywhere for Windows Desktop Help Centre** - The full help centre for the latest released version of **Vision Anywhere** for Windows Desktop can be accessed from the following link http://help.visionhealth.co.uk/va/windows/content/home.htm.

- **Vision Anywhere Mobile** - You can also access **Vision Anywhere** on a mobile device, there are help centres for the following platforms detailing how to use the software and including short video overviews:

    - **iOS** - http://help.visionhealth.co.uk/va/IOS/content/home.htm.

    - **Android** - http://help.visionhealth.co.uk/va/android/Content/Home.htm

Mobile apps are reliant on 3G/4G (or WiFi) to offer real time access to patient records. This provides resilience in the situation of a power cut to the surgery.

When you sign into **Vision Anywhere** on a mobile device and select an appointment book, the appointments 7 days either side of today automatically download to the device. You can also manually download records to a device, very useful for home visits where the network coverage is not reliable:

- Selecting and Downloading Patients iOS - https://help.cegedim-healthcare.co.uk/va/IOS/content/Tripane%20Help/Selecting_and_Downloading_Patients.htm.

- Selecting and Downloading Patients Android - https://help.cegedim-healthcare.co.uk/va/android/main/Content/Tripane/2 - Select and Download Patients.htm.

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