

Epic BCA Downtime Manual



Quick Reference Checklist

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Epic BCA Downtime Manual

Quick Reference Checklist

This checklist contains a snapshot of the information you need to know in the event of scheduled or unscheduled Epic downtime. Note, this information has been condensed. To view the complete process, access the complete Epic BCA Downtime Manual by clicking [here](#).

Epic Downtime Process

Visit it.houstonmethodist.org and click on the **Downtime** tab to view and download the **BCA Downtime Manual** and other resources.

The screenshot shows the Houston Methodist website's Downtime page. The navigation bar includes 'PHYSICIANS', 'STAFF', 'LEADERS', 'EPIC UPDATE', 'DOWNTIME', 'REMOTE', and 'SUPPORT'. The main content area has a red header 'Downtime' and a blue background with a server room image. Text explains that downtimes occur when systems are unavailable during two instances: planned downtimes for maintenance and upgrade, and unscheduled downtimes due to technical issues. Below this are three columns: 'Epic Downtime How to Prepare' with a list of links, 'Quick Links' with three buttons, and 'Epic Status: Normal' with a 'Downtimes' section listing specific downtime events.

Stay Informed

What does Epic BCA downtime mean?

Epic BCA downtime is the abbreviation for business continuity access downtime which is the necessary process and computer functions required to maintain patient care activities during downtime and the recovery process. The Epic BCA Downtime Manual is your guide when Epic is unavailable due to any scheduled and unscheduled downtimes. During downtimes, you're expected to follow a detailed process for capturing and recording data on appropriate forms and entering that data into Epic when the system is available again.

To help you prepare for scheduled or unscheduled Epic downtimes, get familiar with your downtime kit.

Scheduled downtimes due to system upgrades or "fixes" will be coordinated at times when patient care is least impacted.



What is an Epic Downtime?

Epic downtime happens when Epic is unavailable for use at Houston Methodist, usually during two instances:

- Scheduled downtimes for system maintenance and upgrades
- Unscheduled downtimes due to technical difficulties

Why should I review the BCA Downtime Manual?

- To fully understand how to process and handle patient information during Epic downtime
- To maintain patient care activities during downtime and the recovery process
- Access the full [BCA Downtime Manual](#) on it.houstonmethodist.org under the **Downtime** tab

When should I use the BCA Downtime Manual?

Clinicians are expected to follow a detailed process for capturing and recording data on appropriate forms and entering that data into Epic during the recovery period.

What is the Downtime Kit?

Downtime procedures go into effect when Epic is under maintenance or is not operational. The kit contains relevant paperwork to use during these times. **Every area/department has an Epic downtime kit customized for their area. The kit has necessary paper forms and instructions to support clinicians in maintaining continuity of care. Kits include:**

- Facility phone numbers list
- Downtime policy/procedure documentation
- Downtime checklist
- Blank labels
- Forms and other documentation, such as:
 - Nursing documentation forms (flowsheet records)
 - Blank MAR forms
 - Blank physician order forms
 - Blank progress notes
 - Downtime event forms
 - Requisition slips
 - Department specific order sets and forms

Note: Pharmacies should have blank labels on hand prior to any downtime. In the event of a planned downtime, the blank label supply should be checked and if necessary, use the Custom Label activity to print blank Med and IV labels.

What should clinicians do before a scheduled downtime?

- **Enter Orders:** Orders, ancillary procedures and labs to be completed during downtime should be entered in Epic before downtime begins.
- **Organize Downtime Forms:** Downtime forms are located in your downtime kit. During scheduled downtimes, prepare any needed forms before downtime begins.
- **Coordinate Patient Labels:** Place patient labels on paper downtime forms, including each page of the paper flowsheet, if needed.



What are the Nursing Downtime Procedures?

All nurses should follow the guidelines below for documenting during downtime.

Documentation:

1. Print necessary downtime reports from BCA Web or BCA Downtime PCs as appropriate (Clinical Summary, MAR, etc.). Retrieve appropriate documentation, order and requisition forms from downtime Kits.
2. Document assessments, interventions, plan of care, I&O's, IV's, IV titration and vital signs on the paper flow sheet.
3. All new orders are placed either on blank Physician Order forms or pre-printed Order Sets found in Downtime Kits and placed in the order section of the Downtime Clinical Summary in patient paper chart.
4. Document medication administrations on paper MAR report as outlined in next section. For new patients, use blank MAR forms found in the Downtime Kit.

Medication Administration:

1. For patients who have an electronic medication profile, Medication Administration Record (MAR) reports will be printed from BCA Web or BCA PCs.
2. For new patients and/or patients without an electronic med profile, use blank MARs found in the Downtime Kits.
3. Update paper Medication Profiles with new medication orders received since the time of printing and throughout the downtime. For medication schedules, use standard administration times.
 - a) Transcribe new orders onto the paper medication profile & administration schedules in the designated time column. (Include comments and/or end times if specified.)
 - b) Mark discontinued meds by writing "Discontinued" next to the entry and crossing out the medication name using a single line through the medication entry. Initial, date and time entry.
 - c) If a medication is changed, discontinue the original order as above and transcribe the new order as a new medication entry.

Know Your Level, Recognize the BCA Icons and Identify Your Workstation




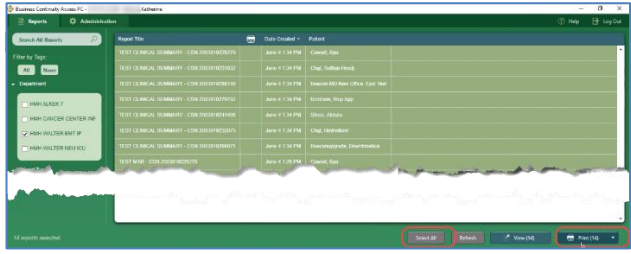
Refer to this checklist as you prepare for an Epic downtime.

<input type="checkbox"/>	Communicate that downtime procedures are in effect to other clinicians.
<input type="checkbox"/>	Identify your downtime kits and identify your workstation/BCA PC. Note: Every department has a downtime workstation. These computers are identified with a sticker that reads: "Epic BCA Downtime Device" or "Downtime BCA"
<input type="checkbox"/>	Assess the downtime level based on the availability of SRO (Supports Read Only), BCA Web and/or BCA PCs.
<input type="checkbox"/>	Be sure to review the four BCA icons and know what each means. Follow the below downtime procedures based on the downtime level:

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Downtime Type	LEVEL 1 Scheduled Access SRO (Minimal Paper Charting)	LEVEL 2 Unscheduled Access BCA Web &/or BCA Computer & Printer (Start Paper Charting Immediately)
Tool to access Epic	Supports Read Only (SRO)	BCA Web and/or BCA PC
Instructions	<p>Log in to the SRO environment</p>  <p>READ ONLY</p> <p>Use your Epic Hyperspace username and password</p> <p>Access read-only version of Epic</p> <p>Record downtime events on paper forms</p> <p>Keep paper forms until information is recovered</p>	<p>From any workstation, open the BCA Web icon:</p>  <p>BCA WEB</p> <p>Log in using your Epic Hyperspace username and password to do the following:</p> <ul style="list-style-type: none"> • View/Print the appropriate reports • Record downtime events on paper forms • Keep paper forms until information is recovered <p>*If BCA Web is not available, locate your BCA PC*</p> <p>Identify your downtime workstation and access the BCA Printing icon:</p>  <p>Log in using your Epic Hyperspace username and password.</p> <p>Print the appropriate reports:</p> 

<input type="checkbox"/>	Print patient labels and put labels on patient forms
<input type="checkbox"/>	Distribute/make available downtime forms
<input type="checkbox"/>	Create/update patient paper chart
<input type="checkbox"/>	Begin the recovery process



<input type="checkbox"/>	Once Epic is back up, notify clinicians to return to normal operations
<input type="checkbox"/>	Collect all documentation for Health Information Management (HIM)/Medical Records to scan into the medical record (see the full recovery procedure on page 18 of the BCA Downtime Manual)

After Epic Downtime

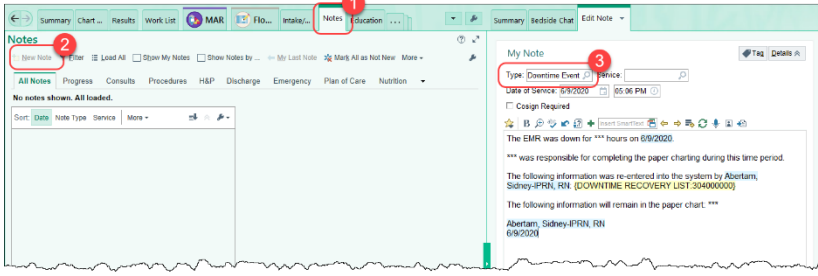
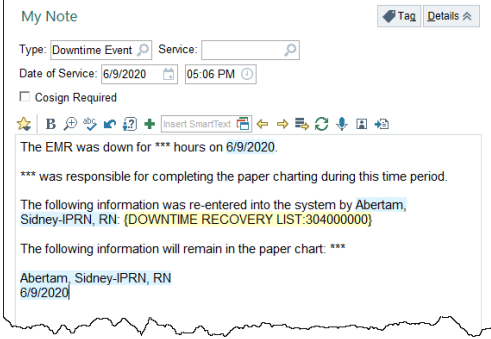
Upon Resuming Documentation in Epic:

Step	Detail	Responsible
1	<ul style="list-style-type: none"> Verify the census (ensure that patients are in the correct rooms and beds). Transfers and discharges need to be entered by Patient Access Services using ADT Downtime Event Form. 	Nursing Patient Access
2	<ul style="list-style-type: none"> Enter in Epic all non-medication orders (ancillary consultations, nursing activities, etc.) <ol style="list-style-type: none"> The following departments will be entering orders sent with manual requisition slips: Radiology, Laboratory and Non-Invasive Cardiology. Respiratory orders will be entered in Epic by the designated Respiratory Therapist. <u>Note:</u> Downtime orders must be acknowledged after verification in Epic. Prior to resuming documentation of meds in Epic, you must verify the electronic Medication Administration Record (MAR). <ol style="list-style-type: none"> Confirm new medication orders and schedules in Epic's MAR (highlighted items) against the physician orders & paper MAR. Discrepancies in order entry and/or future schedules must be communicated to Pharmacy for corrections prior to confirming the order. Orders must be acknowledged after verification in computer. Medication Administration: Nursing will keep the original paper orders in the chart until the patient is discharged. Then they will be scanned into the medical record by HIM staff. 	Nursing
3	<ul style="list-style-type: none"> Before removing medication schedules generated during downtime, verify administration of dose and document against the schedules with the appropriate reason. 	Nursing
4	<ul style="list-style-type: none"> Documentation forms used during the downtime will become a permanent part of the medical record. Place forms in the designated section of the chart and discard interim reports (Clinical Summary, etc.) in the confidential recycle bin. 	Nursing
5	<ul style="list-style-type: none"> Using Epic, Add Downtime Documentation <ul style="list-style-type: none"> Open Vitals flowsheet Select Add Rows 	Nursing



Step	Detail	Responsible
	<ul style="list-style-type: none"> ○ Search for and add the Downtime Documentation flowsheet group to the flowsheet. ○ Document “Downtime Begin” and “Downtime End” times in the flowsheet rows that now appear at the top of the flowsheet. ○ Use clock icon to open time entry and document the Begin and End times in respective rows and time columns 	
6	<ul style="list-style-type: none"> ● Intravenous Medication Reconciliation Instructions <ul style="list-style-type: none"> ○ Reconciliation is the process of updating and documenting IV bags and/or continuous infusions following an interruption in computer documentation. IVs should be reconciled after a downtime for the accurate documentation of intake and output. I. During Downtime: <ul style="list-style-type: none"> a) Document IV bags and the corresponding IV intake volume on the paper flowsheet. b) Continue to hang IV bags in the correct sequence while on paper. II. After Downtime: Update IVs in Epic <ul style="list-style-type: none"> a) End bags that were completed or stopped during computer downtime. (Verify remaining volume prior to ending bags.) b) Scan current bags into Epic to resume computer documentation. Note: Be sure to adjust the volume of each bag to the actual remaining volume upon resuming online documentation. c) If a bag previously hung is still infusing, update the remaining volume. 	Nursing
7	<ul style="list-style-type: none"> ● Post-Downtime Recovery: Once the system becomes available, enter clinically required data into Epic. Paper documentation created during downtime should be placed in the patient’s chart. 	Nursing
8	<ul style="list-style-type: none"> ● Essential Data – ADT must reconcile patients’ locations in Epic and make sure that MRNs are resolved. 	Patient Access



Step	Detail	Responsible
9	<ul style="list-style-type: none"> Downtime Event Note: All patients system-wide will need the following event note completed in order to satisfy regulatory compliance: <ol style="list-style-type: none"> From the Notes activity, select New Note and enter a note type of Downtime Event Note.  Create a downtime event note using the Downtime Event Note SmartText  	Nursing

Access the Right Reports

The chart below shows all of the reports available for clinicians to pull during downtime:

Departments	Report Name	Report Description
Patient Access	Census	Basic information about patients in the hospital, such as date of birth, admission time and attending provider.
Ambulatory Clinics	Clinical Summary	Clinical data for each patient, including active orders, recent results and vitals.
	Daily Appointment Report (DAR)	Information about upcoming appointments within a department for use during a downtime.
Emergency Departments	Census	Basic information about patients in the hospital, such as date of birth, admission time and attending provider.

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Departments	Report Name	Report Description
	Medical Administration Report (MAR)	Medication administration information about a patient during a downtime.
	Clinical Summary	Clinical data for each patient, including active orders, recent results and vitals.
Lab	Census	Basic information about patients in the hospital, such as date of birth, admission time and attending provider.
HOD	DAR	Information about upcoming appointments within a department for use during a downtime.
	Clinical Summary	Clinical data for each patient, including active orders, recent results and vitals.
	Medical Administration Report (MAR)	Medication administration information about a patient during a downtime.
Inpatient	Medical Administration Report (MAR)	Medication administration information about a patient during a downtime.
	Clinical Summary	Clinical data for each patient, including active orders, recent results, vitals, and the respiratory patient summary report.
	Census	Basic information about patients in the hospital, such as date of birth, admission time and attending provider
Surgical	Master Daily Schedule	All of the scheduled cases for the day.
	Pick List	Case information about the patient, including supplies for surgery, drugs, instructions, etc.
	Preference Cards	Case-neutral information about surgeons' preference cards.
	Clinical Summary	Clinical data for each patient, including active orders, recent results and vitals.
	MAR	Medication administration information about a patient during a downtime.
	Anesthesia Record	Anesthesia records in which the patient hasn't been marked Ready for Procedure.
Pharmacy	Rx Med Profile	Patient-specific medication information, such as relevant results, allergies and all medications.
	Census	Basic information about patients in the hospital, such as date of birth, admission time and attending provider.



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Departments	Report Name	Report Description
	Rx MAR	Medication administration information about a patient during a downtime.
	Rx Cart Fill Full by Dept.	Information for orders that are dispensing from a cart.

Documentation Recovery

For all patients, update the patient chart based on any events that happened during downtime.

High Priority Critical Elements for Inpatient	Downtime ≤ 1 hour	Downtime 1-3 hours	Downtime > 3 hours	Entering User
Height/Weight		Enter all		Nursing
Allergies				
Lines/Drains/Airways				
Isolation and Infection Flags				
Code Status				
FYI Flags				
Pregnancy Status				
Medication Orders	Use the “Transcribed from paper” mode, enter orders into Epic: Enter all medication orders			Pharmacist
Medication Administration	Enter all (**Do not enter until Pharmacy communicates that they have finished recovering orders**)			Nursing
Non-Medication Orders	Enter all Nursing non-medication orders including future labs, diet, activity, ancillary consults, etc. (Do not enter orders for medications or performed labs)			Nursing
Respiratory Orders	Enter all Respiratory non-medication orders			Respiratory
Imaging Orders	Enter all orders performed during downtime to reconcile exams			Radiology
Problem List	Enter all			Provider

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Inpatient Admission Data Sets	Downtime ≤ 1 hour	Downtime 1-3 hours	Downtime > 3 hours	Entering User
Prior to Admission Meds	Enter all	Enter all for patients admitted during the downtime		Nursing
Patient (head-to-toe) Assessment		Enter all for patients admitted during the downtime		
Fall risk		Initial assessment for all patients admitted during the downtime		
Braden scale				

Inpatient-other critical data	Downtime ≤ 1 hour	Downtime 1-3 hours	Downtime > 3 hours	Entering User
Vitals	Enter all	One set per shift or if pertinent others occur. Device integration units-do not back enter-the data will file when the system comes back up		Nurse
Intake/Output		I & O shift totals		Nurse
Blood Administration		Enter all		Nurse
Vent settings		Enter last settings		Respiratory
Care plan		Enter all		Nurse
Notes		Scan in		Scan
Code Documentation		Scan in (TBD medication entry)		Scan
Discharge Instructions		Scan in		Scan

Ancillary Clinical Services	Downtime ≤ 1 hour	Downtime 1-3 hours	Downtime > 3 hours	Entering User
PT/OT/SLP/Evaluation and Re-Evaluation	Enter all	Enter last assessment		PT, OT, SLP,
PT/OT/SLP/Treatment Plan		Enter all		PT, OT, SLP

Oncology/Ambulatory Clinical Services	Downtime ≤ 1 hour	Downtime 1-3 hours	Downtime > 3 hours	Entering User
Oncology - Any manipulation of the Treatment Plan or Therapy Plan, including the following: completing treatment day, dose changes, and schedule change.		Enter all		Nurse
Oncology - Cancer Staging (new or revised)		Enter all		Provider

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Oncology/Ambulatory - final lab results from non-Houston Methodist labs	Enter all	Nurse
Oncology/Ambulatory - any new items or updates that are pushed to MyChart: problem list, med list, allergies, immunizations, preventative care/health maintenance, test results, history, vital signs	Enter all	Nurse
Oncology/Ambulatory - MyChart activation code generation for new patient or proxy	Enter all	Nurse
Problem List	Enter all	Provider