

Quick Notes Smart Backup Kit

What is Smart Backup: This kit is one of our productivity packages that will work with your current QNotes. What you have purchased is a backup procedure that included all the tools and training you need to create proper backups. It is easy to use and fast; in fact the whole backup process usually happens in less than a minute. So there will be high compliance with your staff to use it regularly. **Remember, this product includes staff training.** Please call us with any questions.

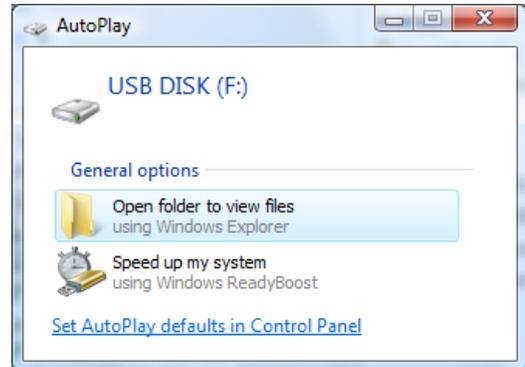
Why was Smart Backup created: Our backup solution takes a different approach than most traditional backups because it shows you ongoing results. Most other backup solutions are “Blind” in that you really don’t know if they worked or not. The Quick Notes Smart Backup is designed to meet your need to perform regular backups of the Q'Notes version 4 and 5 databases. The patient data, Qcode macros and template files will all be backed up in a rotating fashion onto removable USB Drives. Optionally, if you use our PDQ or Barcode products then your original raw dictation will be archived into a yearlong history file. A good backup procedure is critical to running your business; in fact it is a matter of law that you must maintain a valid and current backup copy of your electronic patient records as well as a recovery plan.

What is included: Three (3) quality, high capacity & high speed USB drives for Monday, Wednesday and Friday. Replacement and additional USB drives for an **offsite backup** or for other days can be ordered from Quick Notes. Also included is the Smart Backup software and ongoing training. We are always happy to use our “Help Me Now” remote service to walk you through creating a proper backup. We will include a normal use replacement warrantee on the USB drives for 3 years. Check our site www.qnotes.com/sb for updates.

What was updated for QNotes Office V5: QNotes Office has additional data files and new features that depend on new databases. Smart Backup was upgraded to support all the new database files. Also, when you upgrade to the new HS Drives you will get the new drag and drop features. The old drives will allow 5 document files to be drag and dropped. The new HS series drives will support thousands of files. Document files include Word, PDF, text, rich text (rtf) and JPG images.

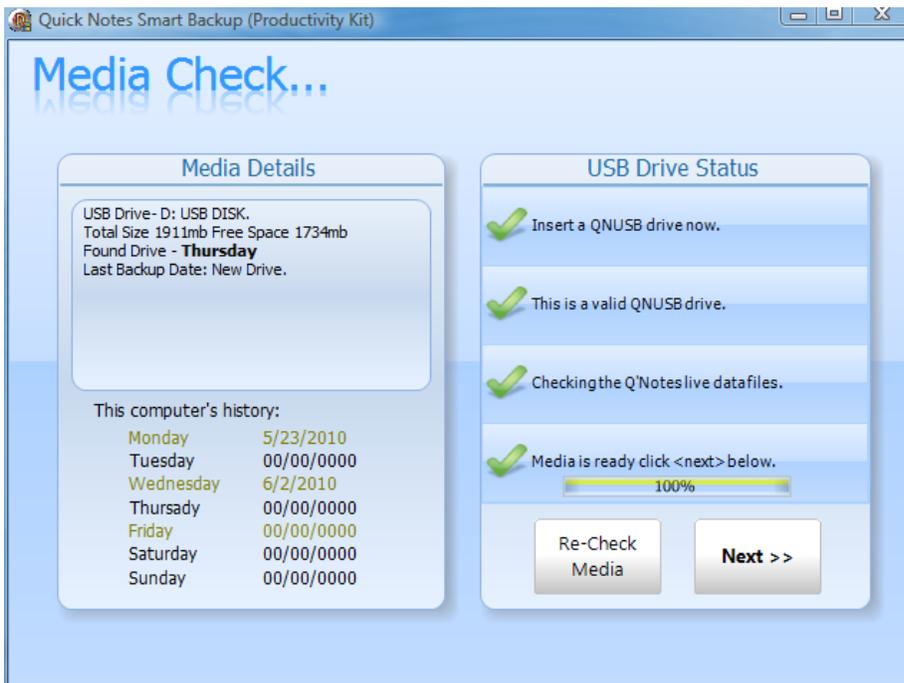
Requirements: Any computer with access to the QNotes data folder. Although backing up over a network is supported it can take a little longer and we recommend backing up at your main QNotes computer. Any of our dictation devices that generate a raw file, like PDQ or Barcoding, will benefit from the raw dictation being archived as part of the backup as long as you backup from the computer with the PDA or Scanner ‘s download box. These are **dedicated USB Drives** and should not be formatted or used for any other files unless properly cleared.

Installation and Setup: The best computer to install the software is the one that you normally Download / HotSync from. This is not required to backup your patient's data, however, the RAW barcoded or PDQ data will only be included if you backup from the Download / HotSync computer. The software installation program, SmartBackup.exe, is located on the USB drive - usually the yellow one. You must install Smart Backup to an existing QNotes folder (c:\qnotes) so that the data files can be located. When you insert the USB drive Windows may display a small screen that will let you open the USB Drive folder to see the install file. If you do not get this option then simply use My Computer to open the USB Drive where you can run the easy to use installation program. After you have installed the software and run it the first time you will see a setup button where you can get to some of the optional features or check for software updates (see email section at the end of this document).



When using Smart Backup you can just close this screen if it opens after you have inserted the USB Drive or you can turn AutoPlay off.

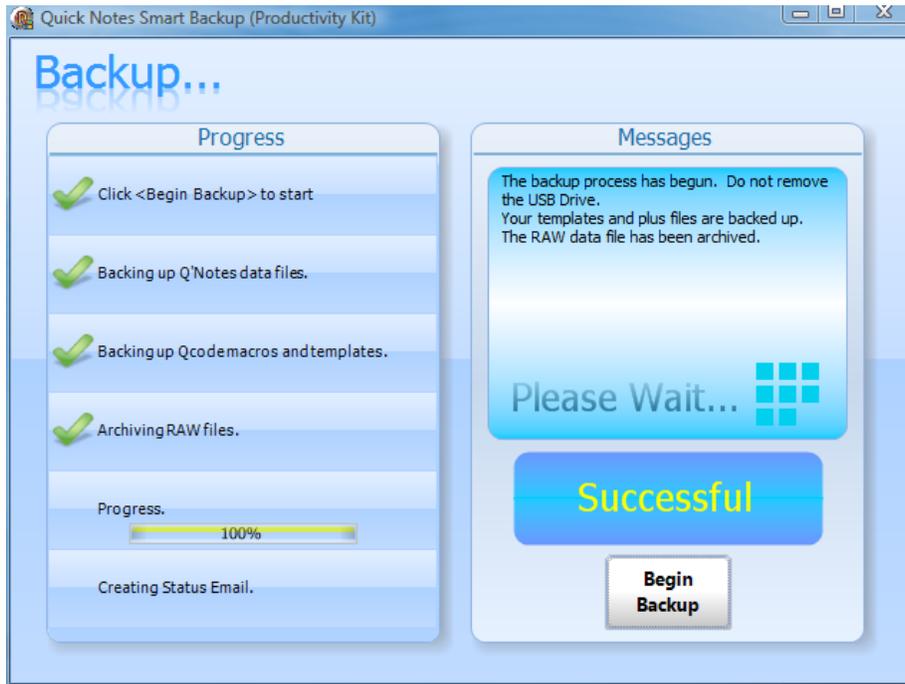
How to use: Simply make sure everyone has exited QNotes (you can leave Qrunner Task Bar running) then run Smart Backup from the QRunner Task bar or with the icon on your desktop and at the **Media Check** screen, insert the USB drive that matches the day of the week. The software will make sure you inserted the correct USB drive and check to make sure that everyone has exited QNotes. When the screen says that it is 100% ready, click <Next> to display the Backup Screen.



Each of the USB drives is marked for the day of the week just below the **M T W T F** printing.



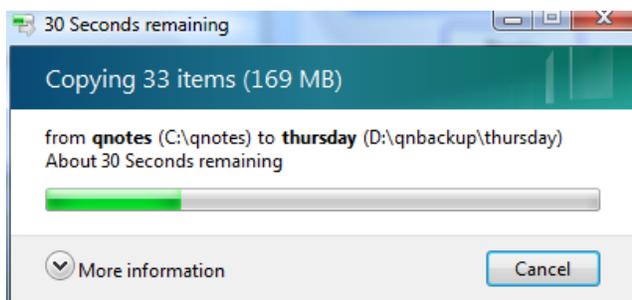
Now from the **Backup Screen**, click <Begin Backup> and the data, templates and Qcode macros will all be backed up. Then a message will let you know when the backup was successful. Depending on your settings, and after the backup is finished, the software will either make a report or send an email with the backup details. The whole process should take about a minute on an average speed computer.



Additional USB Drives are available to use for an offsite backup or for a weekend backup.

If you have setup your local email program (not a web based one) then a status email can be sent.

During the backup process, everyone will be locked out of QNotes. If you have never entered an email address or if your email program does not work* then the status will be written to a log file. On some versions of Windows you may see a status dialogue showing the progress. When the process is finished you will be instructed when to remove the USB drive. **Never remove the USB drive when the light on the top of the USB drive is flashing or blinking.** Smart Backup will detect if you are backing up old data rather than live current data and warn you. If you get any warnings you should call Quick Notes support.



Most versions of windows will display a file copy dialog screen. If you see this screen or a similar one, just wait for it to close.

Drag and Drop of document files:



Anytime you see Scriber with this target you can **drag and drop** a document to the target. The screen will let you know that the file has been backed up. We support most types of documents so you can clean up your computer desktop or just have peace of mind that your important file was backed up. Double clicking on the target will open the list of files that were backed up on the current Smart Backup Drive.

Clearing a Smart Backup Drive: This feature will be added in the next free Smart Backup V5 update. The clear feature will convert the special drive into a normal drive and wipe all patient information off the drive. We do this in a multi step process including writing 1s and 0s over the empty drive so all patient data is not only deleted but is scrubbed off the drive. As a final step we clear the drive and offer to format it.

Replacement or additional USB Drives: The Smart Backup USB Drives are covered by a three year replacement warrantee. Send the old one back and you get a new one free. Visible damage and water damage are not covered. Additional USB drives for other days of the week, larger capacity or offsite storage are available to order from Quick Notes.

*To test your MAPI email program simply click on the <Test Email> button on the setup screen. If you have a working email account on this computer then you will see a new email message ready to send. We have tested Outlook, Outlook Express, and Windows Mail with Smart Backup. Vista computers with UAC turned on may require Smart Backup to be run as an administrator. To setup an email program you will need your email account information including the server name, account name, password and sometimes the sending port #. For Web based email you can always send the status report that was saved to your desktop.

HIPAA requirements:

Smart Backup V5 will include a clear feature that will properly scrub all patient data off a drive. Once a drive is properly erased and cleared, you can freely use the drive for any other purposes. A cleared drive will no longer work with the Smart Backup software.

You should store your USB drives the same way you would store any other backup of your patient's information. Keep in mind that there are HIPAA regulations on where you may store your patient data. You do not want to keep your backup where a patient or vendor or unauthorized employee can easily take it. The HIPAA Security Rule (section 164) specifically requires, among other things, the following safeguards:

1. Data Backup Plan – 164.308(a)(7)(ii)(A)
2. Disaster Recovery Plan – 164.308(a)(7)(II)(B)
3. Emergency Mode Operations Plan – 164.308(a)(7)(II)(C)
4. Emergency Access Procedures – 164.312(a)(2)(ii)
5. Data Backup and Storage – 164.310(d)(2)(iv)
6. Contingency Operations – 164.310(a)(2)(i)

There are other regulations regarding HIPAA's ePHI (electronic protected health information) for data that is transmitted over a public network like the internet. The Smart Backup does not transmit any patient data over the internet. Having a backup that is an exact copy of your live data and that can be restored to the same computer or a different computer running QNotes means that you are HIPAA compliant with the above regulations. When and if the backup is needed simply call QNotes and we will be happy to help you restore the data. The restore service is free to all Gold Service customers or will be billed at the normal per incident rate for Silver customers.