



Subject: How Do I Know If I'm Backing Up the Right Files?

<FIRSTNAME>,

I am frequently asked this question: How do I know if I am backing up the right files? The answer will probably surprise you.

As I talk with my clients, I discover that most of them thought their vendor was backing up all their files. In some cases, the vendors were backing up main files, for example patient data and patient's medical history. However, a few of them realized their vendor was not backing up any of the files.

One of my "new" clients, a medical firm, experienced the drama of a system crash. Suddenly, they had no idea which appointments were scheduled for the day, how to access their patient information, or even how retrieve their patient's history.

The office manager, Sally quickly picked up the phone and called her vendor. She discovered she had more than one vendor to call to restore her data files. It felt like a hair pulling ordeal, making several calls to restore and then check the data to make sure it was available.

By 3 pm, she uncovered a disappointing discovery. After the data recovery, the folder that held all the templates for printing various forms to run the practice was missing. These were the same forms that painstaking took several days to pull together, type, and refine to meet all the new medical complaint requirements.

Before the end of the workday, she made another revelation. All the referral doctor information was missing. This file accumulated contact information for other doctors over time. When patients needed a specialist or needed medical attention while in another part of the country, this file contained the best doctors for patients with those special needs.

Unfortunately, the staff had to waste time over the next two weeks to research and recreate the practice's forms. As far as the doctor referral file, only a few of the doctors were documented on paper could be reentered into the file.

There is a positive side to this story. Her firm is now my client. None of this will ever happen again. Whenever there is any kind of data failure, from hard drive



collapsing, office fire, or theft, her firm data will not only be restored, but will be restore within less than a few hours.

Now to answer the question, how do I know if I am backing up all the right files? Here are a few steps that will help you:

- 1) Call each software vendor and ask them the following questions:
  - a. Which files need to be backed-up?
  - b. Do they have any recommendations for best practices for backing up your files?
  - c. Do they provide any form of file back-up service?
  - d. Are the ancillary files that set-up your software's parameters or determine your system's preferences backed-up? For example, this could be security files, patient classification files, acceptable billing types, and etc.
- 2) Look through your process. Do you use any electronic files or forms stored in a folder on your desktop or computer that you use? You want to back these up, too.
- 3) In addition, you may have some modifications in which several applications share files. Have your IT personnel confirm any software application modifications.

If you are still uncertain, whether your backup process includes all of your important files, you are invited to call my office at 478-787-9999 and speak with Amy to schedule a free audit. At the end of my audit, you will be aware if you are missing any files from your back up process.

Your peace of mind for having all of your data available, every time you need it, is most important to us. That is why we offer a FREE audit available for you.

Make your day great,

John Brewer

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