



Upgrade Path to Success: TouchWorks® EHR 22

Achieving more every day

May 9, 2023

SAFE HARBOR

The following demonstration reflects generally available features and functionality and also includes a demonstration of features and functionality that Altera currently anticipates including in future solution releases. The development, release and timing of any future features or functionality remains at the sole discretion of Altera and should not be relied upon in making purchasing decisions. Please contact your Altera account executive or refer to the related solution documentation for more specific details on the timing and anticipated functionality in future solution releases. Your Altera account executive can also assist in identifying the environment, implementation and configuration specifications that are required for the solutions to perform as demonstrated.

Housekeeping



Recorded session,
listening-only mode,
lines are muted



Ask questions via
Q&A panel



Watch for a
follow-up email
containing webinar
recording

Upgrade Path to Success

TouchWorks EHR v22



CHRISTINE PIPER

Senior Manager of Client Success

- 20+ years experience with TouchWorks EHR
- 10 years in a clinical setting
- 10 years with Keena
- Originating founder of CRUG

AGENDA

Proper planning

Review of prep work prior to kick-off

Managing expectation and perception

Find Your Dream Team



MUST: Client Project Manager (ideally) with experience in TouchWorks EHR upgrades

Analyst team for prep work, configuration, testing & training

IT/Server team

Interface resources

Super Users per role for testing, training and support

Pre-Upgrade Checklist

Planning

1. Create a client-side project plan
2. Prep of phases & resourcing
 - Upgrade readiness
 - Configuration scoping
 - Test plans
 - Training outline
 - Go-live support

Third-Party Integrations

1. Identify Unity vs. Ubiquity vs database calls vs. UAI Desktop agent
 - Include Contact Name(s) and Details
2. Notify vendors of go-live date as soon as it is known.
 - More than likely they will need to adjust the integrations and often have SOWs in place for this work.

Security

1. Appoint an SME on TouchWorks EHR Security
2. Each user should have one Security Classification assigned based on role
3. Lock down all security gates with codes assigned
4. Perform analysis: users **vs.** security classification **vs.** workplace (menus)
5. Learn new security codes introduced in next version and determine plan for updating security

For information on any staffing or workflow assistance services, contact [Christine Piper](#):
Christine.piper@keenahealth.com

Pre-Upgrade Configuration

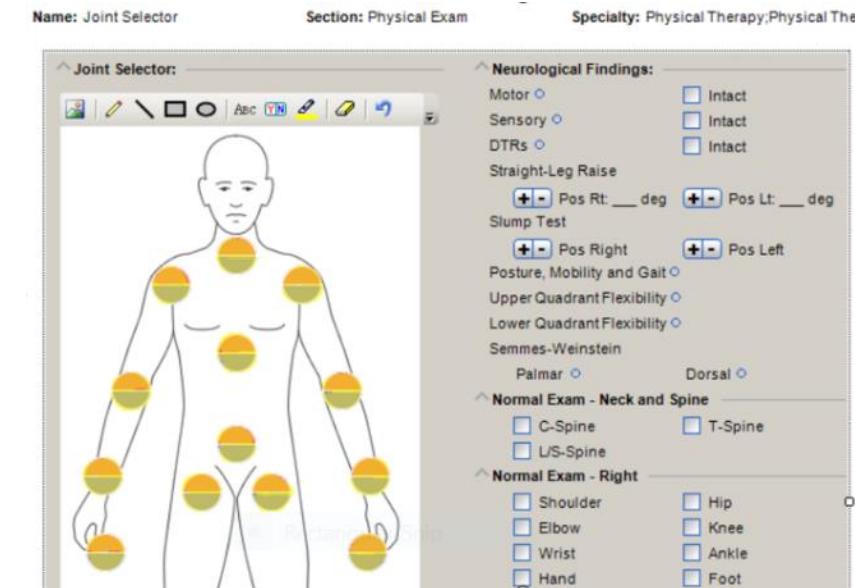
User Cleanup

- Cleanup Active Users (aka if they have not accessed the system in XX days then deactivate)
- Confirm all TouchWorks EHR users have AD Accounts

NoteForms with Hotspot Images

- If known to be in use, convert users to other NoteForms
- Determine HotSpot NoteForms linked to Input Template and/or such Active NoteForms in Note Admin (via SQL is easiest)
- Unlink Hotspot Noteforms from Input Templates (if applicable)
- Inactivate NoteFormsthat have Hotspots

Hotspot NoteForm Example



For information on any staffing or workflow assistance services, contact [Christine Piper](mailto:Christine.piper@keenahealth.com):
Christine.piper@keenahealth.com

Additional Section(s) Needed?

- “Add Section” is a sunset functionality the Note Outline
- Add additional sections to Note Input Templates if needed
- Surveying users on use may be needed

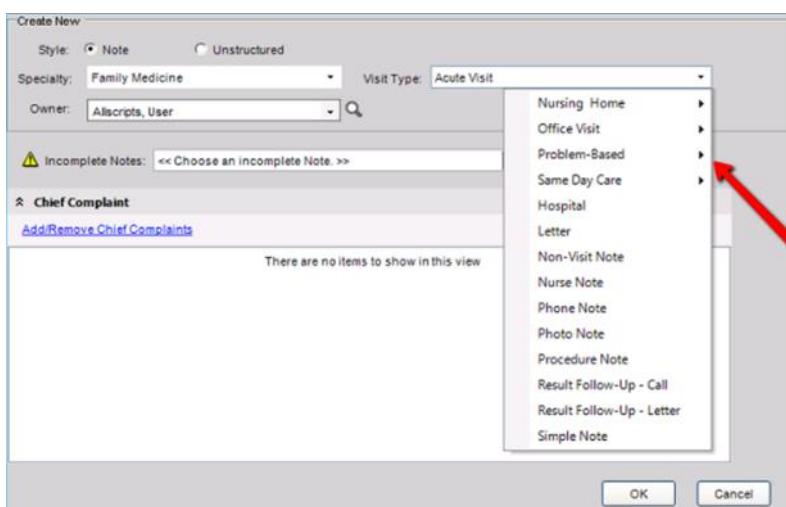
Evaluation of Structured Note Dropdown per Specialty

- Evaluate Structured Note Dropdowns for potential redesign with additional categorized Parent Forms due to dropdown length causing scrollbar

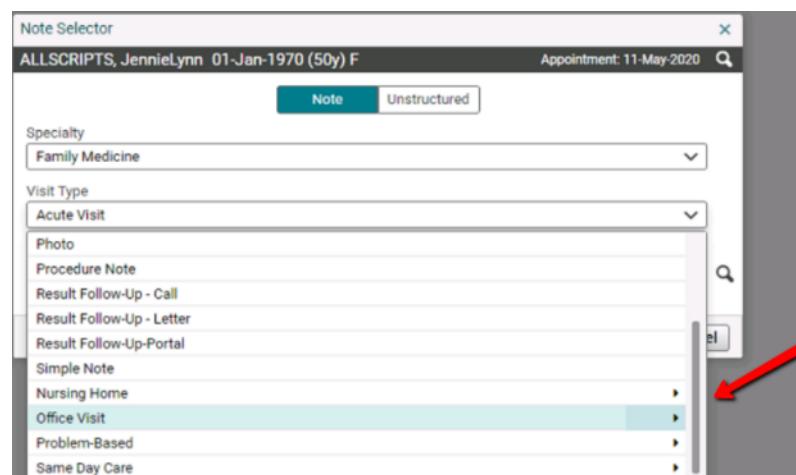
For information on any staffing or workflow assistance services, contact [Christine Piper](#):
Christine.piper@keenahealth.com

Structured Note Dropdown

Old Tech Stack 19.4 or earlier

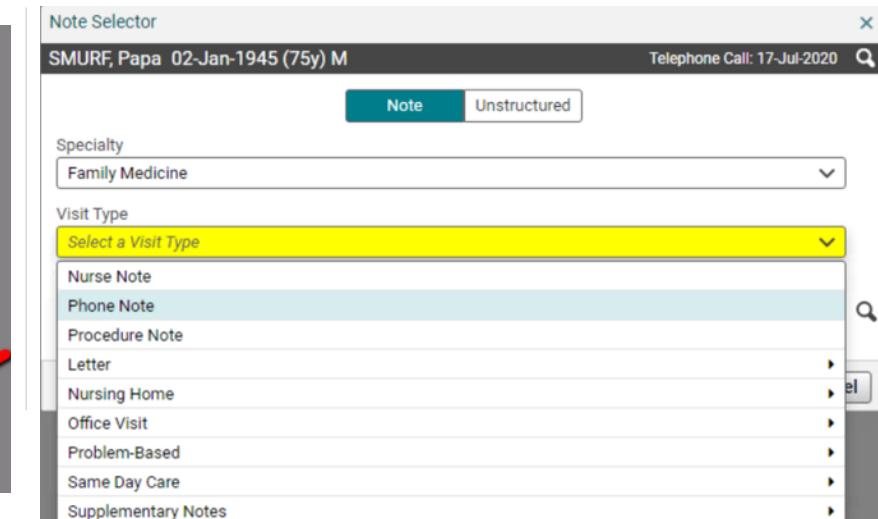


New Tech Stack v20+



*v22 - List will be alphabetic

New Tech Stack After Edit



*v22 - List will be alphabetic



Workspaces: Clinical Desktop and Note View

No Personal Clinical or NAW Desktops

- Adjust security to stop generation of personal views
- Determine list of users who have personal views (SQL is the easiest)
- Assign users to Enterprise view by default
- Delete Personal Views

Document Outline of Current Enterprise Views

- Which ones will need pane count adjustments?
- Medication Flowsheet (Retired)
- Which ones have Third-Party Integration buttons?
- No Problem Components set to “All”



Data Cleanup

Task Optimization

- Review all active/in progress tasks (SQL) and make effort to address all “old” tasks
- Review all Task Views in ensure they are manageable in tasks count (<500)
- Confirm there is a tasking management policy/procedure implemented
 - HINT: Make use of the Overdue timeframes
- Make sure all users have an assigned default view

Cleanup of Tasks

- Make sure all tasks still assigned to inactive users are addressed
- If task is due to a Med, Order, or Document make sure you clean up data beyond tasks (DB Scripting)

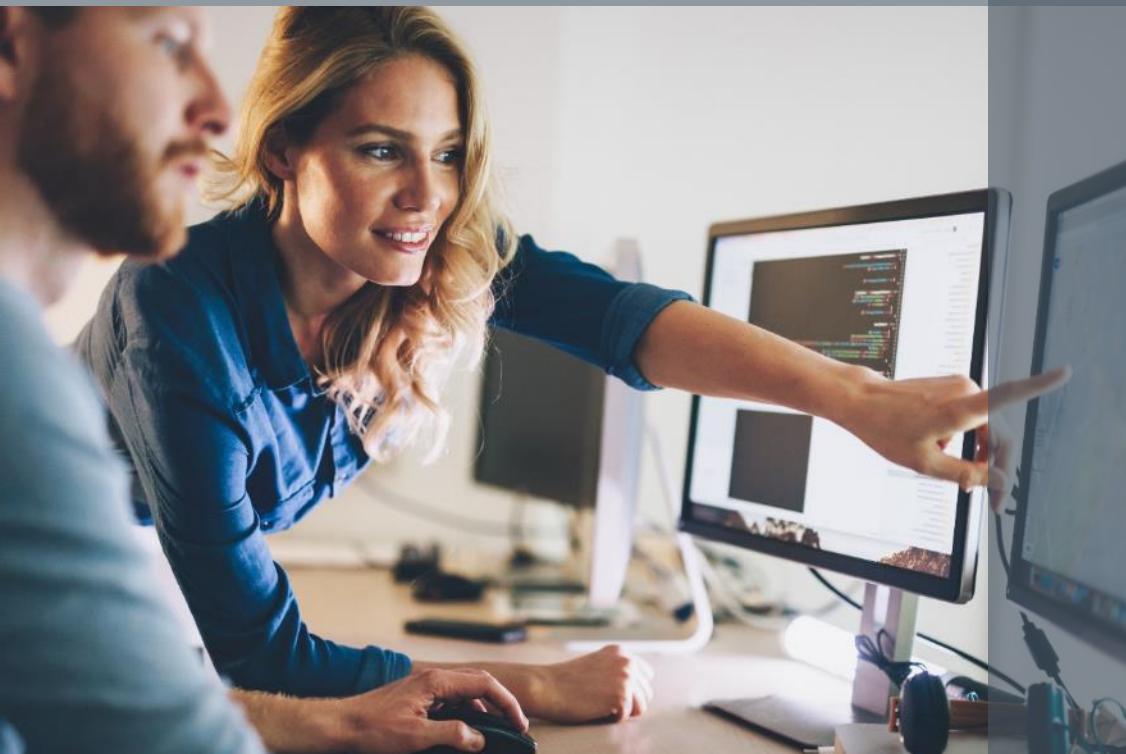
Admin Forms

- If in use, convert to other documentation capabilities
- Finalize all outstanding Admin Forms (DB Scripting)

Favorites

- Confirm system is not setup to automatically learn favorites (preference)
- Run Favorites Cleanup Tool (less than 300 per category)

Need Additional Help



Project Management w/ Case Management

- 75 – 125 Hours

Configuration Education and Completion

- 35 – 40 Hours
- 2 – 4 Hours Overview Education

Testing – two rounds; two sets of eyes

- 30- 45 hours per round for remote work

Training Material (or updates to current)

- 15 – 50+ Hours Depending on Requests

Go-Live Services – Assistance on go-live weekend and after

- Helpdesk Services – allow us to cover the day to day and added go-live support

THANK YOU!

Let's continue the dialogue:

Christine Piper

Senior Manager of Client Success

christine.piper@keenahealth.com

office: (315) 707-7843 x109

mobile: (320) 894-2084





QUESTIONS?



ASCENDING TO NEW HEIGHTS IN HEALTHCARE