



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

PRESENTER: CHRISTINE PIPER

DATE: MAY 9, 2023

TODAY'S PRESENTATION



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 inactivate)
- Confirm all TouchWorks EHR users have AD Accounts

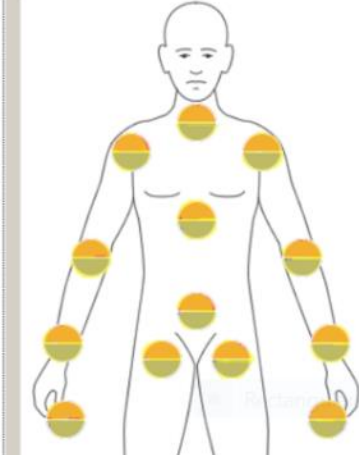
NoteForms with Hotspot Images

- 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 NoteForms that have Hotspots

Hotspot NoteForm Example

Name: Joint Selector Section: Physical Exam Specialty: Physical Therapy;Physical Ther

^ Joint Selector:



^ Neurological Findings:

Motor ☐ Intact

Sensory ☐ Intact

DTRs ☐ Intact

Straight-Leg Raise ☐ Pos Rt: ___ deg ☐ Pos Lt: ___ deg

Slump Test ☐ Pos Right ☐ Pos Left

Posture, Mobility and Gait ☐

Upper Quadrant Flexibility ☐

Lower Quadrant Flexibility ☐

Semmes-Weinstein

Palmar ☐ Dorsal ☐

^ Normal Exam - Neck and Spine

☐ C-Spine ☐ T-Spine

☐ L/S-Spine

^ Normal Exam - Right

☐ Shoulder ☐ Hip

☐ Elbow ☐ Knee

☐ Wrist ☐ Ankle

☐ Hand ☐ Foot

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Pre-Upgrade Configuration

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

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Structured Note Dropdown

Old Tech Stack 19.4 or earlier

Style: ☒ Note ☐ Unstructured

Specialty: Family Medicine Visit Type: Acute Visit

Owner: Allscripts, User

Incomplete Notes: << Choose an incomplete Note. >>

Chief Complaint

Add/Remove Chief Complaints

There are no items to show in this view

OK Cancel

New Tech Stack v20+

Note Selector

ALLSCRIPTS, JennieLynn 01-Jan-1970 (50y) F Appointment: 11-May-2020

Note Unstructured

Specialty: Family Medicine

Visit Type: Acute Visit

Photo

Procedure Note

Result Follow-Up - Call

Result Follow-Up - Letter

Result Follow-Up - Portal

Simple Note

Nursing Home

Office Visit

Problem-Based

Same Day Care

*v22 - List will be alphabetic

New Tech Stack After Edit

Note Selector

SMURF, Papa 02-Jan-1945 (75y) M Telephone Call: 17-Jul-2020

Note Unstructured

Specialty: Family Medicine

Visit Type: Select a Visit Type

Nurse Note

Phone Note

Procedure Note

Letter

Nursing Home

Office Visit

Problem-Based

Same Day Care

Supplementary Notes

*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:

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QUESTIONS?



ASCENDING TO NEW HEIGHTS IN HEALTHCARE