Application Management Services for TouchWorks® EHR

Altera Managed Services

Mar. 15, 2023

Agenda

01 Industry Perspectives on Managed IT Services And Altera's Response

02 Application Management Services Overview

03 Real-Life Client Scenarios and Experiences

04 Q&A

Industry Perspectives on Managed IT Services

A Managed Service Provider (MSP) is an outsourcer contracted to remotely manage or deliver IT services such as network, application, infrastructure, or security management to a client company by assuming full responsibility for those services and determining what technologies and services are needed to fulfill clients' needs.

- Services delivered by an MSP are delivered by employees located at clients' locations or elsewhere.
- MSPs can also bundle in hardware, software, or cloud technology as part of their offerings.

Benefits of Managed IT Services
- Reduced expenses
- Access to a larger talent pool
- Access to skills unavailable locally
- Better use of internal resources
- Ability to quickly scale
- Facilitate continuous improvement

Source: CIO Magazine, 2021

Industry Challenges

Cost pressures and expanding IT spend

Fragmented market solutions

Shortage of skilled resources

COVID-19 and Increased work from home/remote

Industry consolidation leads to resource duplication

High spend on third-party consultants to drive strategy

Expansion to tertiary care centers

Altera Managed Services

Managed Services value proposition:
- Operational Efficiency (ISO 9001-certified QMS)
- Certified Altera Application Specialists

Value-add focus:
- Client capital projects
- Optimization projects to increase efficiency
- Outcomes projects to achieve clinical and financial outcomes
- Scalability up/down as needed
- Proactive problem management – manage problems out of the environment
- Proactive user education

Global clinical professionals
- **45** Physicians
- **16** Nurses
- **12** Pharmacists
- **84** Other Clinical Professional

Clients & staffing
- **100** Managed Services Clients
- **2,100+** Managed Services Staffing (globally)

Applications
- **1,000** Applications Supported
- **4,190** Interfaces
- **1,767** Databases
- **6.4 PB** Data Storage

Devices
- **28,289** Desktops
- **7,567** Laptops
- **9,418** Printers
- **4,813** Other Devices
- **27,319** Phones
- **1,565** Physical Servers
- **4,401** Virtual Servers

Service desk support
- **23K+** Contacts/Month
- **~13K** First-call Resolution
- **>55%** – FCR All Tickets
- **99%** – FCR-qualified Tickets
- **4.88/5** CSAT

Network
- **2,109** Network Switches & Routers
- **728** Remote Locations
- **4,667** Wireless Access Points

Summary of Services Available for TouchWorks EHR Clients

Provides high-skill labor resources to take on or support <u>ongoing client operations</u> related to HIT solutions

BROAD-SCALE, CUSTOMIZABLE SERVICES

- IT Outsourcing (ITO) – Full Shop
- Application Management
- Staff Augmentation – Specific Roles
- Network/ Infrastructure Services
- Integration Services
- Global Managed Services Bank of Hours
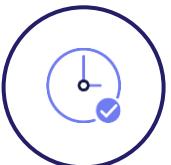
FOCUSED, PACKAGED SERVICES
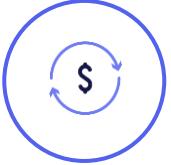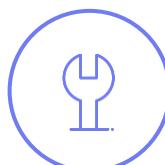
- IT Service Desk
- Upgrade Assistance Service
- Testing Center of Excellence
- Revenue Cycle Center of Excellence
- Business Continuity Service

Summary of Services Available for TouchWorks EHR Clients

Provides high-skill labor resources to take on or support <u>ongoing client operations</u> related to HIT solutions

Application Management Services Overview

TouchWorks EHR and Veradigm Practice Management

TouchWorks EHR - Application Management Services

New Practice/ Clinic Build

- User/Provider Builds
- AAP/MU Enrolment
- EPCS Enrolment
- Site/Group-specific Print Templates Configuration
- Charge Configuration- Exploding Sets, Modifier Additions, Sub-group Creation
- Task and Worklist Configuration
- Prenatal Access
- Touch Chart/Scan Configuration
- FollowMyHealth

Configuration

- Dictionary
- v11 Note Configuration
- Chart Admin
- Group Admin
- Orders Set Up
- Auto Print Default
- Lab/Rad setup
- Setting Auto-Print Defaults
- Care Guide setup
- Macros
- Task and Worklist
- Security Admin

Integration

- Interface Architecture Design
- End-to-end Interface Development
- Data migration interface to backload historical data
- Interface Migration to Rhapsody/eLink Platform
- Interface Development and Support through Rhapsody, eLink, CorePoint and Cloverleaf Engines
- 24 x 7 Integration Monitoring (Operations)

Business Intelligence

- Custom report developments for Following Application
  - ✓ TouchWorks EHR
  - ✓ Altera Care Director
  - ✓ Ezcap
- TW Deconversion
- End to End Data Warehousing services
- ETL Development and Support
- SSRS reporting. Smart Dashboard reports
- SAP BO report development and scheduling

Veradigm® Practice Management Workflow Configs

Patient Registration

- Verify Demographics
- Incoming/Outgoing Referral workflows
- Patient Coverage Eligibility
- Collections and Post Co-Pay/Self-Pay Balances

Scheduling

- Appointment Management
- Scheduling Template configuration and setup
- Incoming/Outgoing Referral and Recall Configuration
- Encounter Forms/ Facesheet configuration
- Appt. Reminder calls Manual/Automated setup
- Eligibility checks Manual/Automated setup

Charges

- Entering charges Manual/Auto Import
- Attach Unassigned Payments
- Work on copay/self-pay Balances
- Charge/Payment Batch Verification/Validation
- Failed Vouchers Corrections

Payments & Denials

- Manual/Automatic Remit/EOB config/Setup
- Self-Pay Payment workflows
- Co-Ins./Co-Pay setup
- Patient/Insurance Refunds
- Denial Management

Veradigm Practice Management Workflow Configs

Billing Workflows

- Self-Pay Statement Processing (Paper/Electronic)
- Working on Held/Pending claims
- Family Billing/Facility Billing Config
- RHC, Occupational Med Billing, Workers Compensation Billing Config
- EDI send snf receive scheduled Tasks

Insurance

- Appointment Insurance Carrier Setup
- Prepare Paper/Electronic Claims
- Claim Format Config - 4010, 5010, 837I, UB04, 837P, CMS1500 claim Submission Config

Daily/Month-End Processes

- Closing/Balancing Batches
- Closing and Balancing Month End Reports
- General Ledger Reports
- EDI send receive scheduled Tasks

Other

- ICD Codes import and setup
- Procedure Code setup and config
- User/Providers transfer, Terminations
- Pending/Unpaid Claims Management Setup
- Office Manager Setup and Config
- Self-Pay Collections Configuration and workflow setup
- PM Dashboard Setup and Config
- General Ledger and other Export Utilities setup

Service Delivery Management

- Provides a single point of contact for customer for issue resolution.
- Helps drive consistency of approach to bring benefits to all clients
- Roadmap understanding with the client
- Regulatory changes and discussions
- Discussions and implementation of best practices – Synergies from accounts
- Independent approach and client perspective to oversee service quality within the delivery organization.

Methodology

- Altera event-based methodology for net-new projects
- ITIL framework for service operations
- Analyze – design – develop – test – deploy
- Microsoft productivity tools
- Microsoft project planner
- Use of ticketing tool to track the incidents and requests.
- Ca clarity tool to track budget vs actual efforts
- Service Now (SNOW) for any product related incidents

Service Delivery Management

- Reporting and Dashboard
- Project Management
- Contract Management
- Service Level Management
- Policies, Procedures and Compliance
- Work Forecasting
- Incident Management
- Service Request Management

Real-life Scenarios in TouchWorks EHR

Veradigm PM Application Management Services and Operational Support

Scenario − 1

New Clinic Acquisition (TouchWorks EHR and Veradigm PM)

Problem statement:
A client acquires a new clinic/Provider group and expands their patient care. The client IT team needs to build the new practice/org into their existing TouchWorks EHR/Veradigm PM application. With the bulk of work on a stringent deadline and the non-scalability of the IT department of the client, the whole project is at risk for completion.

Where Managed Services comes in:
- Staff augmentation and extended team support with the clinical/integration/database team to fulfill the build/tasks on time.

- Expert Implementation Consultants were engaged to build new practices, provisioning of providers/non-providers, Order/Results builds, Notes, Charges, Schedules, Data Migration, EPCS, etc.

Outcome:
- Due to the scalability of MS staff, the client was able to complete the configuration and build work within the stipulated time and with high quality.

Scenario – 2

New/Maintain Ancillary Lab/Rad Systems

Problem statement:
When the client engages new ancillary systems like Lab/Rad or updates on the existing ancillary system, the client requires resources with adequate knowledge to build the compendium/results and other configurations such as Order Requisition Report, Charges, Default Print settings, etc. in TouchWorks EHR. The client will also require resources who can build the interface between the TouchWorks EHR and the ancillary application.

Where Managed Services comes in:

- As a **client extended team,** MS provided all required resources under one umbrella, including a dedicated Service Delivery Manager to ensure a smooth and timely delivery.

Outcome:

- The client did not have to manage multiple vendors to complete the required configuration tasks/activities and interface/report build requests.

Scenario – 3

Daily/Weekly/Monthly activities

Problem statement:
These tasks need lots of effort from client clinical/IT staff to complete at regular intervals in a timely manner. This results in over burn of resources at specific intervals to furnish results of all these tasks in time.

Where Managed Services comes in:

Provided resources to complete these tasks within the stipulated time with high quality and multi-level quality checks.

Examples:

- **Monitoring eRx/Fax/Print** – Proactive monitoring to make sure to take real-time appropriate actions to address the issue/alert.
- **90 Days user Inactivation** – Extracts reports to identify users not logged into the application for 90+ Days and inactivate them in respective applications.
- **iVerify Build (Patient Eligibility)** – Bulk appointment export from Veradigm PM to request Patient's insurance eligibility.
- **DEA/State License Updates** – Extract reports monthly to review the upcoming expiring licenses, engage the client credentialing team to get the new expiration date to update the same in TouchWorks EHR.
- **Server Patching Activity.**

Outcome:

Clients can use their Clinical/IT staff on more value-added tasks/activities and patient care.

Scenario – 4

ICD (Diagnosis codes) Update

Problem statement:
Every year diagnosis codes are revised, added, or deleted to ensure the system offers accurate and up-to-date procedure codes to improve healthcare costs and ensure fair reimbursement policies. The client was facing challenges in keeping the system compliant with these diagnosis codes as it involved a high degree of manual effort.

Where Managed Services comes in:

- Owned this task and created the innovative idea to import the ICD file and make the required changes with help of the MS BI (Business Intelligence team), thus reducing the overall manual effort.

Outcome:

The system remained compliant with ICD codes each year and thereby **reduced the number of denials** from the payer. Automating this process not only saved time for the client but also reduced the number of errors that could have arisen if the work was performed manually.

Scenario – 5

Annual Procedure code update

Problem statement:

The Current Procedural Terminology codes offer doctors and health care professionals a uniform language for coding medical services and procedures to streamline reporting and increase accuracy and efficiency. Clients have unique requirements to create custom procedure codes to meet their billing needs.

Where Managed Services comes in:

- Created a database with rules for custom procedure codes per client requirements, using the CMS file as base file and automating the process of configuring these procedure codes via SQL script, thus eliminating manual intervention.

Outcome:

- The client's billing process is accurate and efficient as a result of compliance with CPT codes and custom codes. With Managed Services, the process was automated (manual intervention no longer required).

Scenario – 6

Patient test results errored in Interface

Problem Statement:
Client with more than 2,050 Affiliated Providers in a group experienced a backlog of more than 100,000 interface error that went unnoticed over time. Due to the errors, providers did not receive results through the TouchWorks EHR Interface. Despite having in-house IT department, the client did not have a person serving as the Interface/Clinical Analyst to identify and resolve the interface errors on time.

Where Managed Services comes in:

- Staff augmentation provided extended team support with the clinical /integration/database team.
- Established Interface Monitoring (24x7) and an error resolution process to address the interface errors by the next day.

Outcome:

- Due to the scalability of MS resources, the entire backlog was cleared within a few months and achieved next day error resolution then after.
- Eliminated need for faxing results, creating a more efficient operation and higher physician satisfaction.

Managed Services Client Experience

Our Experience and Expertise

SUPPORT DETAILS

14 TW MS Clients

360 Interfaces

TICKETS/YEAR

>10,000 Incidents

>16,600 Requests

PROJECTS/YEAR

>55 Client Projects

>150 Practice/Clinic Builds

PROJECT DETAILS

- Deconversion Projects
- Conversion Projects
- Interface Engine Migration Projects
- Reference Lab integration

Client Testimonials

"The Altera MS Rhapsody team made it so our interfaces were problem-free immediately after taking responsibility for them. It is great to have people that can solve problems, but it is better to have people that can prevent problems from happening. That's what your team accomplished, and I value that completely."

"I wanted to express how fantastic it is to work with Monali! She is dedicated, and very thorough in all the work she does. If she doesn't know something, she reaches out and get us the answer. I don't know where we would be on the eLink/Rhapsody project if it weren't for all her hard work and long, extra hours."

"We have been a Managed Services (MS) Client for nearly three years now. I referred to this MS group as my 'dream team,' and during this time, we engaged in several groundbreaking projects for our organization."

"I would like to recognize Neel for his outstanding efforts with our quality data needs over the year. Neel is very responsive all the time and always has a positive attitude. During our MIPS reporting this year, Neel made the reporting process very smooth by sending all our files timely each week, communicating regularly and he was open to make any changes that we asked him to. It was such a pleasure to work with him, and he is an excellent asset to the Altera MS team."

Common Reasons Clients Consider Altera Managed Services

Offers simplification – Single source MSP with capabilities across a wide variety of solutions and infrastructure services, as well as access to industry partnerships.

Delivers cost effective delivery model balancing onshore and offshore resourcing.

Provides coverage for services that are difficult to staff locally or difficult to cover 24x7.

Offers rapid scalability for dynamically changing organizations.

Delivers access to a 'larger bench' when demand exceeds capacity.

Helps manage extensive workload or backlog of services, such as service desk or projects.

Reduced IT Staff dilution – enable IT departments to focus on the higher value, higher priority.

Q&A

Ascending to new heights in healthcare.

Altera
DIGITAL HEALTH

Ascending to new heights
in healthcare.

Altera.
DIGITAL HEALTH

Appendix

Client Testimonials

I wanted to express how fantastic it is to work with Monali! She is dedicated, and very thorough in all the work she does. If she doesn't know something, she reaches out and get us the answer. I don't know where we would be on the eLink/Rhapsody project if it weren't for all her hard work and long, extra hours.

I would like to recognize Hitesh Kapadia. I have had the pleasure to work with Hitesh on several projects related to large medical group, ranging from a variety of specific Insurance Carrier data file transfers to even working with our State of Kentucky on COVID reporting. Hitesh is very professional, he is prompt in his responses, he provides relevant status follow ups, and really helps to keep the team (including myself) on track. I really appreciate his help, and all that he brings to his projects.

Hitesh, I want to give you an awesome shout-out and thank you for all you have been doing -- you are doing a great job with our interface work and we all very much appreciate it.

Thank you for all you do!

The Altera MS team had to contend with the challenges of a results-inbound interface that had been in place for twelve years, as well as some additional simultaneous changes regarding orders and accounts." But the MS team took this opportunity to restructure client system, making LabCorp the primary compendium. "The team was instrumental in helping me with all order changes, as well as making them BiD-ready. The one open item post our LC BiD implementation related to requisitions pulling the correct LC account numbers for our separate clinics. As always, the team quickly came together to discuss the mapping to correct this issue. Within the hour we had it implemented and tested!!

Client Testimonials

We have been a Managed Services (MS) Client for nearly three years now. I referred to this MS group as my "dream team", and during this time, we engaged in several groundbreaking projects for our organization

I would like to recognize Neel for his outstanding efforts with our quality data needs over the year. Neel is very responsive all the time and always has a positive attitude. During our MIPS reporting this year, Neel made the reporting process very smooth by sending all our files timely each week, communicating regularly and he was open to make any changes that we asked him to. It was such a pleasure to work with him, and he is an excellent asset to the Altera MS team

The Altera MS Rhapsody team made it so our interfaces were problem-free immediately after taking responsibility for them. It is great to have people that can solve problems, but it is better to have people that can prevent problems from happening. That's what your team accomplished, and I value that completely

We recently discovered an issue with a set of orders that impacted the timeliness of care to patients and needed immediate action to be corrected. Following this discovery, Pamela immediately investigated the issue and both discovered and validated the root cause. She collaborated with our team on a solution and manually created new orders to avoid any further delay to orders marked as "ASAP" by our client's providers and updated the dictionary items to prevent any additional faulty orders from being placed. Rinkal was alerted to this urgent issue and was able to write a solution via a SQL script, validate the script, and send to us in just a few hours. As a result of the great work and dedication from Pamela and Rinkal, we were able to correct this issue in less than 24 hours from the time it was discovered. The execution of this resolution was nothing short of tremendous and had a true impact for our client's patients by preventing any further delays to receiving their care.