



TouchWorks® EHR Q1 Update Webinar

Ascending to new heights in healthcare

Feb, 22nd, 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 follow-
up email containing
webinar recording

Agenda

Feb. 22, 2023

- 
- 01** Introduction and TouchWorks Basecamp
Ben Scharfe, EVP, TouchWorks EHR
 - 02** Upgrade Updates
Sean Schulz, VP, Professional Services, TouchWorks EHR
 - 03** Release Planning
Jeanne Armstrong, CMO, TouchWorks EHR
 - 04** TouchWorks Mobile Companion Mode
Jeanne Armstrong, CMO, TouchWorks EHR
 - 05** Q&A



Launching TouchWorks Basecamp



Save the Date: TouchWorks EHR Basecamp

Basecamp is where we will meet as we prepare to ascend to new heights together. This is your destination to explore our solutions so we can climb to the summit of success.

Join Altera Team in Chicago, IL to discuss the TouchWorks® EHR solution.

We look forward to having you at Basecamp 2023!

WED, JUNE 21, 2023

CHICAGO

Add to calendar

OVERVIEW

- **What is Basecamp?**



Training Sessions



Networking Opportunities



Engage with other practices and our team

- **Date/time:** June 21, 2023

- **Location:** The Merchandise Mart in Chicago

Registration will be open soon!

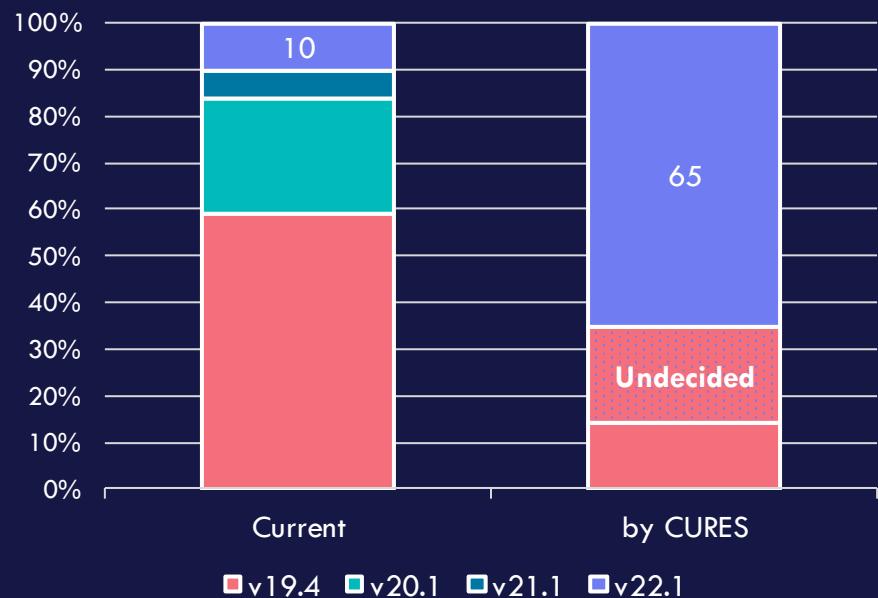
TouchWorks EHR Upgrade Updates

Sean Schulz, VP, Professional Services, TouchWorks EHR

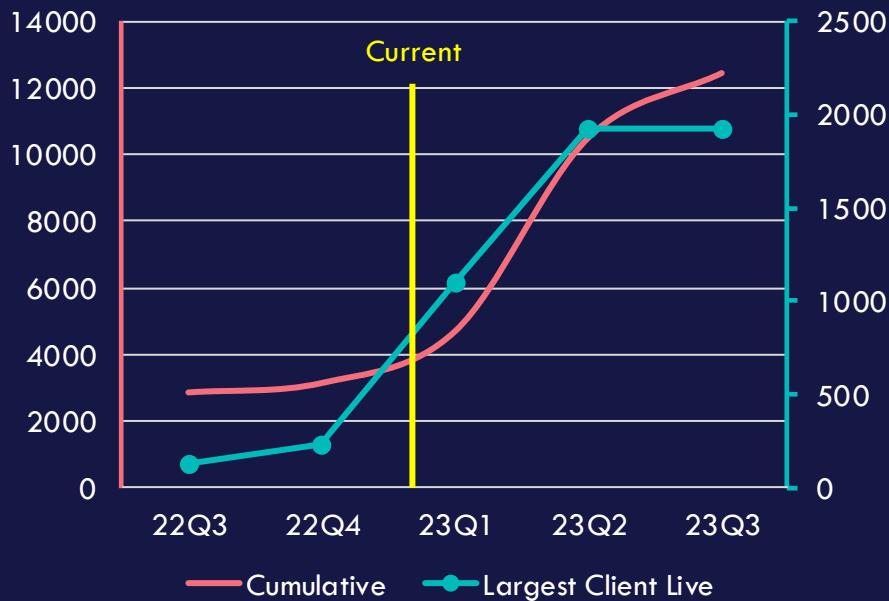
Upgrade Updates

- v22.1 Adoption is Growing

Client Versions

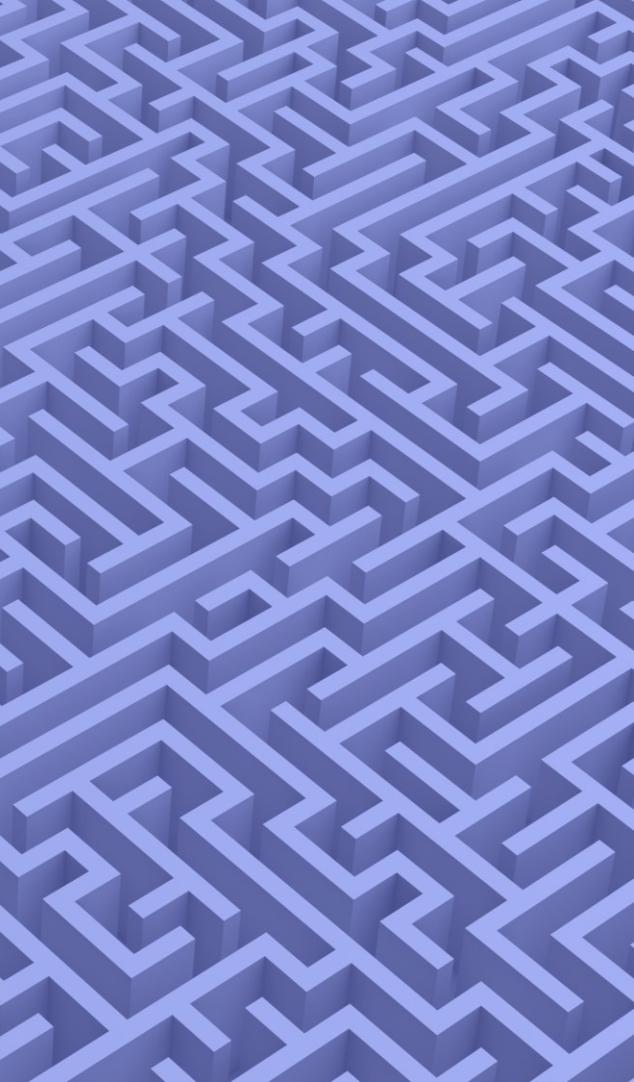


New Stack Providers



Upgrade Challenges

- Client Project Readiness (pre-requisites)
- Altera Manual Task Mistakes (consistency across servers)
- Client Insufficient Testing (who and what)
- User Expectation Setting (old workflows = worse)
- Activation and Normal Operations (communication and patching)



Upgrade Process Improvements



**Pre-Upgrade
Checklist**
Client



**Web Server
Cloning**
R&D



**Internal
Lessons
Learned**
PS



**Pre & Post
Collaboration**
PS, CSEs, Support



**User Testing &
Expectations**
Client

**Patching
Scheduling and Staffing**
Client & Altera Support

TouchWorks Release Planning

Jeanne Armstrong, CMO, TouchWorks EHR

Current and Planned Releases

- V22.1.x = Cures certified release
- 2023 Promoting Interoperability eCR supported in 22.1.2* and 3+
- TouchWorks EHR Mobile 22.1 – note companion



TouchWorks® EHR

- Current: 22.1.3
 - Next: 22.1.4 – Patch 4 TBD late May
 - Future: 2024 – 24.1 02/2024
-
- Current: 19.4 WC 6
 - Next: None
 - Future: None, Does NOT support cures act
 - End of life: 2/24/2025



Altera Prenatal™

- Current: 22.2 GA12/22
- Next: No Planned 2023 release, will assess need for defect releases
- Future: 2024 TBD



TouchWorks® EHR Mobile

- Current: 22.1 12/2022
- Next: 23.1 TBD – fall 2023

V22.1 +



- First half of 2023 we have/will continue to focus on client reported defects
- Client count is an important component of our impact analysis
 - Report issues that are important to your organization!

	TWEHR 20.1*	TWEHR 21.1*	TWEHR 22.1*
Internally Found	1423	535	476
Fixed	1415	517	440
% Fixed	99%	97%	92%
Avg Days to Fix	33.59	45.04	21.54
Client Reported	844	143	158
Fixed	803	131	129
% Fixed	95%	92%	82%
Avg Days to Fix	95.91	89.93	65.97
Avg Clients	2.39	2.40	2.23
Fixed for One Client	389	85	80
% of All Fixed	48%	65%	62%
Found + Reported	2267	678	634
Total Fixed	2218	648	569
Total % Fixed	98%	96%	90%
Not Fixed	49	30	65

TouchWorks EHR Roadmap

	2023 H1	2023 H2	Future
Theme	Regulatory Compliance and Support for Clinician Workflows	Regulatory Compliance and Support for Clinician Workflows and Technical Debt	Regulatory Compliance and Support for Clinician Workflows
Key Features	<ul style="list-style-type: none"> Client Issue Resolution Increased WCAG support SIM (Simple Image Management) aka scan ePA & Rx True Price Opt Out Technical enhancement – exception handling, improved multiple threading, error initiative, deployment improvements Conversion optimizations Record destruction Prenatal technical documentation 	<ul style="list-style-type: none"> Client Issue Resolution SIM (Simple Image Management) <ul style="list-style-type: none"> Basic HIM tools Unified provider sign off workspace Technical enhancements continue, note XML synchronization Records destruction continues MAR Surgical history replacement Enhancement Review** 	<ul style="list-style-type: none"> Past surgical history terminology migration MAR replacement complete Surgical history replacement Technical enhancements Vendor Library Updates
Regulatory Features	<ul style="list-style-type: none"> EHI Export eCR Reporting AIMS Approval MVPs (MIPS Value Pathways) 	<ul style="list-style-type: none"> EHI Export NCPDP support for proposed version MVPs TEFCA 	<ul style="list-style-type: none"> NCPDP TEFCA/QHINs ePA 2026 requirements No surprises/AEOB /?

Overview 2023-2024

- Decrease v22.1.x velocity after patch 4
- V24.1 GA mid Feb 2024



V22.1.x patches

- **Patch 4 – TBD May 2023**
 - Continued to focus on client reported defects
 - Rx true price and ePA, opt out
 - eCR enhancements
- **Patch n – TBD Aug/Sept**
 - Defect resolution
 - EHI export certification release
 - Placeholder for regulatory enhancements
- **Patch n+1 – TBD Nov**



V24.1

- **Technical Initiatives**
- **Regulatory**
 - NCPDP
 - MVPs (Mips Value Pathways)
- **Additional WCAG features**
- **SIM – basic scan replacement**
 - Inbound results/document provider sign off workspace part 1
- **Records Destruction**
- **Client Enhancements** TBD – Attend Monthly VOC calls**



V24.1.x

Mid-2024 MAR

Post v24.1



Looking ahead to 2025

- 2/24/2025*: 19.4 is end of life
- 5/29/2025: Legacy Impact MD/Allscripts Document Management/Scan end of support, maintenance fees to continue TBD



Reminder TouchWorks EHR actively supports current GA release and the previous major release

- Aka code changes are possible when necessary



Final rule related to several regulatory initiatives evolving in 2023-2024

- EHR certification program updates
- Information blocking, penalties
- TEFCA- trusted exchange
- Prior authorization reforms
- Price transparency and cost estimate mandates revised

TouchWorks EHR Mobile Companion Mode

22.1

Adding free text to V11 Note through Voice Recognition Dictation

Companion Mode

- Enables users to dictate, using speech to text, a portion of a v11* note using the TouchWorks EHR Mobile Application
- This feature requires TouchWorks EHR 21.1.2 or later and Unity 2022-Jan-21 BOD (2022.1) or later.

The screenshot shows the TouchWorks EHR Mobile Application interface. At the top, a patient profile for SMITH, Cali L. is displayed, including her birth date (02-Jan-1979), age (43y), gender (Female), and a note about 'NO KNOWN DRUG ALLERGIES'. Below this, a header indicates an 'Office Visit - Allscripts, Provider, M.D.' and the date 'Enc: 05-Dec-2022 | Acute Visit'. A 'TW Note' button is also present. The main area shows a list of four patient entries:

Image	Patient Name	Visit Type	Arr.	Provider	Time	Actions
TESTPATIENT, Betty	FU30 30min	8:30 am	Arr	Allscripts, Provider M.D.		
SMITH, Cali L.	ACUTE 15min	10:15 am	Arr	Allscripts, Provider M.D.		
SMITHFIELD, Bacon	ACUTE 15min	10:30 am	Arr	Allscripts, Provider M.D.		
DOE, Johnathan	ACUTE 15min	10:45 am	Arr	Allscripts, Provider M.D.		

To the right of the patient list is a vertical sidebar with sections: RFV, CC (highlighted with a dark blue bar), HPI, Subj, Obj, ROS, Couns, PE, Results, D/S, Proc, and Plan. At the bottom of the screen, there are several buttons: 'Send To TW', 'Keyboard', 'Record' (which is circled in blue), and 'Next Section'. Below these are icons for 'Patient', 'Schedule', 'Companion' (highlighted with a blue circle and a red '7 29' notification), 'Task List', and 'More'.

Companion Mode



The speech-to-text module uses a portion of Azure Cognitive Services for voice recognition and dictation (not Siri or dragon, etc.)



Workflow requires the note to be started, edited and completed in the base TouchWorks EHR



v11 structured notes linked to appointment encounters are supported with companion



Note must contain one or more of the supported note sections

Best practices

- The note is started by staff and not provider
- Best for those experienced with dictation
- Most efficient to use as a companion, while simultaneous reviewing patient and viewing current visit note from viewer in the base EHR

Note Input Config

- Properties → mark as allow input from external sources

Chief Complaint
Reason For Visit
History of Present Illness
Review of Systems
Physical Exam
Plan
Discussion/Summary
Counseling
Education
Procedure
Results/Data
Subjective
Objective
Other

NOTE ADMIN

Note Templates Structured Content

Document: 1 Ankle Follow-Up Specialty: ORTHOSRG, SPORTMED, ORTHOPED Gender: Unknown Age Range:

Sections

Chief Complaint(s)

Lock Cited List When: Note Finalized

Forms: *** Chief Complaint List ***

Note Input Template Properties

Document Type: 1 Ankle Follow-Up

Assign Specialties: Orthopedic Surgery, Sports Medicine, Orthopedics

Gender: Both (radio button selected), Male, Female

Description: Ortho Ankle Follow-up (ss)

Age Range

Filter Default Note Forms by Selected Specialty

Note Attributes

Allow Input from External Sources (checked)

Security

Finalization Authority: Level 8, Note Owner Authority: Level 8

Security Codes

Prompt to Route for Signature (unchecked), Create Note Icon in Schedule (checked), Permanently Lock Note when Finalized (unchecked)

Create Task

Referring Provider Notification on Finalization (unchecked), Patient Notification Task on Finalization (unchecked), Review Covered Note on Finalization (unchecked)

Force Amendment If

Annotation Added (unchecked), Carbon Copy Added or Edited (unchecked), Encounter Changed (unchecked), Note Owner Changed (unchecked)

Note Visibility

Visible on Saving (radio button selected), Visible on Initial Signing (unchecked), Visible on Finalization (unchecked)

Audit

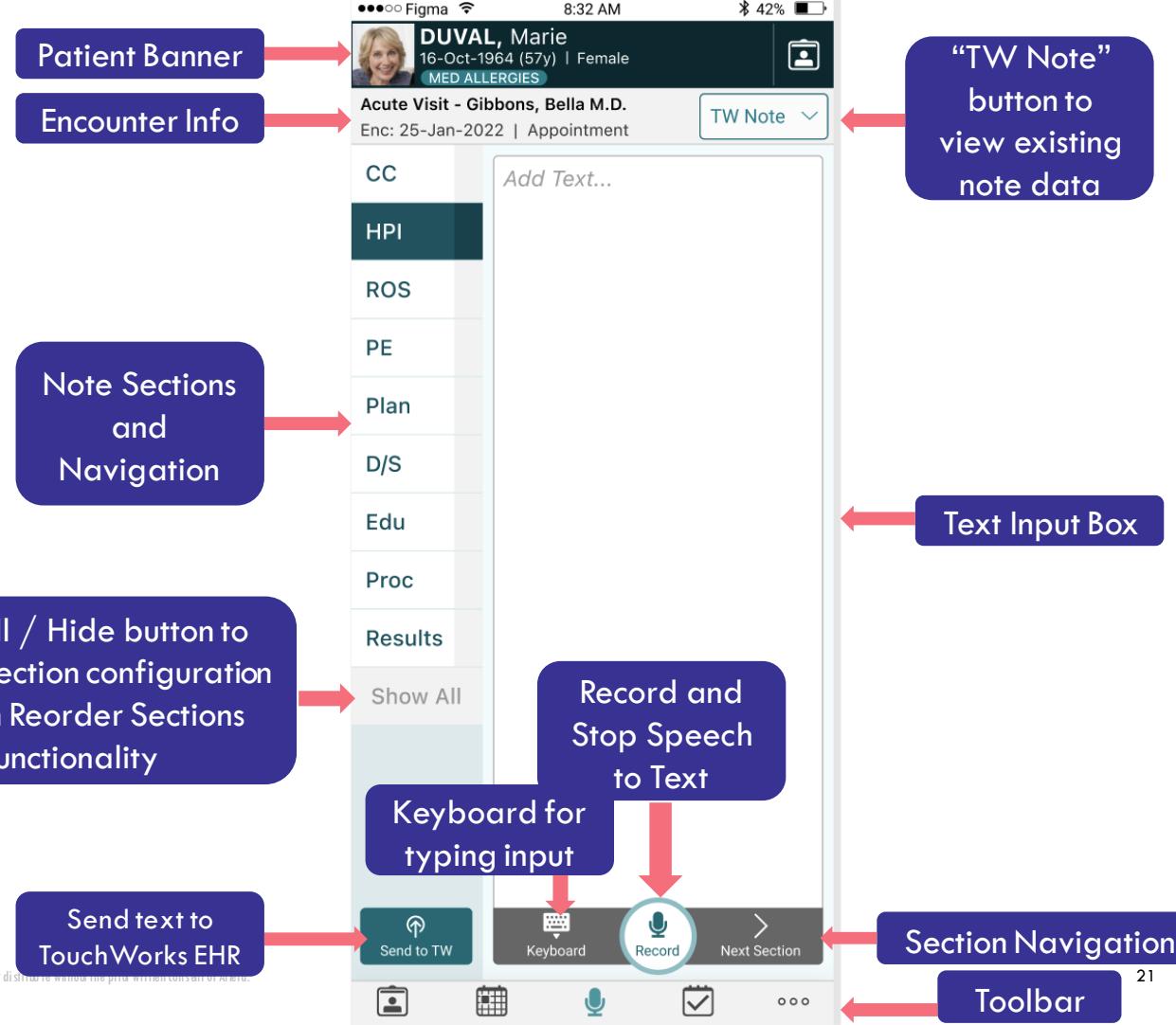
E & M

Inactive (unchecked)

Properties Save Cancel New Input Search

OK Cancel

Companion Mode User Interface



Companion Workflow

- By Selecting the note icon from the schedule view the user is automatically launched into Companion mode to begin dictation

The screenshot shows the Companion app interface. On the left, a patient schedule is displayed with four entries:

- TESTPATIENT, Betty: FU30 30min at 8:30 am, provider Allscripts, Provider M.D.
- SMITH, Cali L.: ACUTE 15min at 10:15 am, provider Allscripts, Provider M.D.
- SMITHFIELD, Bacon: ACUTE 15min at 10:30 am, provider Allscripts, Provider M.D.
- DOE, Johnathan: ACUTE 15min at 10:45 am, provider Allscripts, Provider M.D.

The entry for SMITH, Cali L. has a microphone icon in a red box next to it. A red arrow points from this icon to the 'Record' button in the bottom navigation bar. The top right corner shows the patient details for SMITH, Cali L., and the bottom navigation bar includes buttons for Patient, Schedule, Companion (which is highlighted with a blue circle), Task List, and More.

Companion

SMITH, Cali L.
02-Jan-1979 (43y) | Female
NO KNOWN DRUG ALLERGIES

Office Visit - Allscripts, Provider, M.D.
Enc: 05-Dec-2022 | Acute Visit

TW Note

RFV Add Text...

CC

HPI

Subj

Obj

ROS

Couns

PE

Results

D/S

Proc

Plan

Send To TW

Keyboard

Record

Next Section

Patient

Schedule

Companion

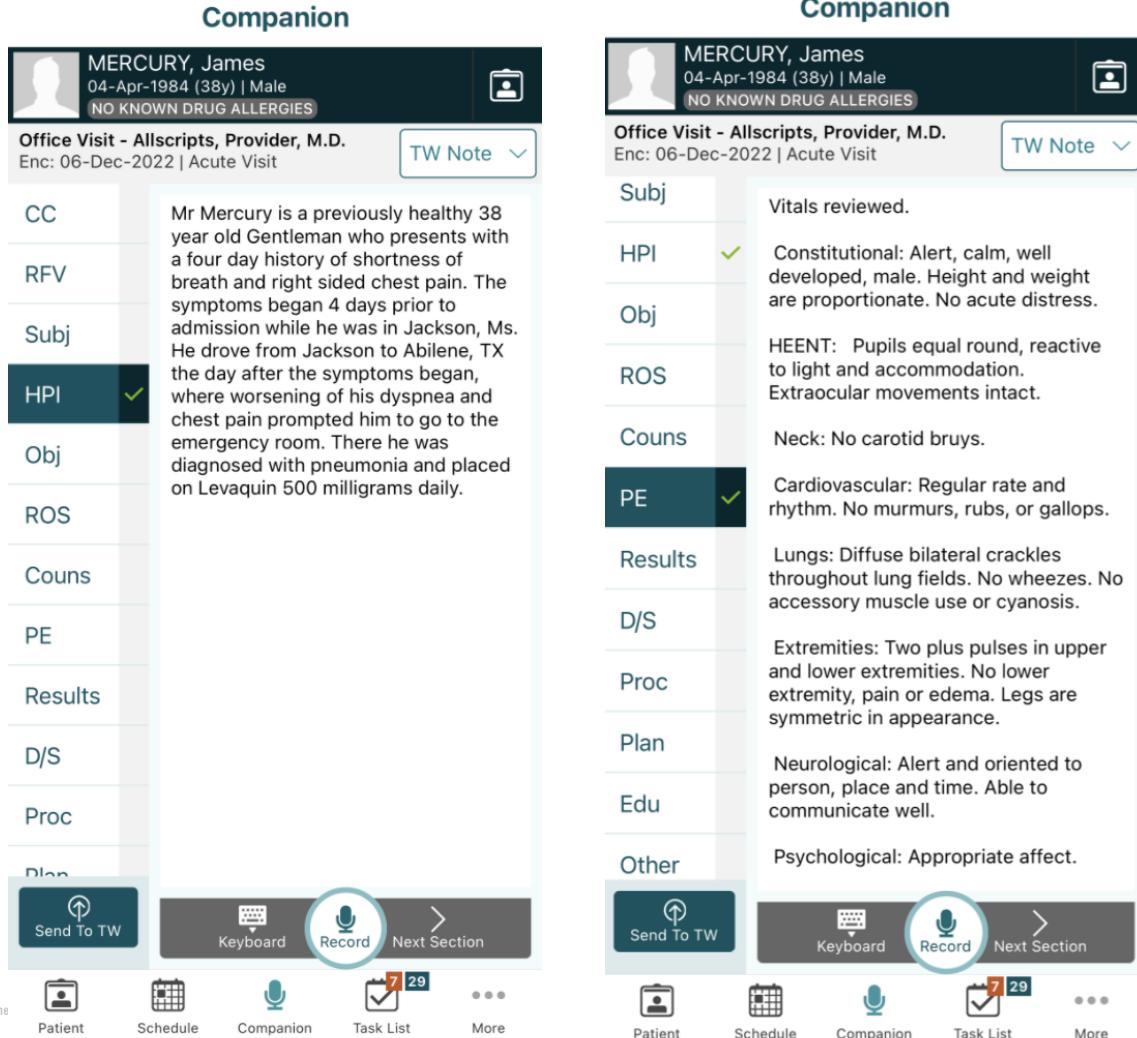
Task List

29

More

Companion Workflow

- Companion modes uses Microsoft Cognitive APIs to turn speech to text
- It supports most medical and pharmacological terminology
- It can recognize most punctuation and new line commands
- The green check mark indicates this note section has dictated text that has not been sent to TouchWorks EHR



Companion

MERCURY, James
04-Apr-1984 (38y) | Male
NO KNOWN DRUG ALLERGIES

Office Visit - Allscripts, Provider, M.D.
Enc: 06-Dec-2022 | Acute Visit

TW Note

CC	Mr Mercury is a previously healthy 38 year old Gentleman who presents with a four day history of shortness of breath and right sided chest pain. The symptoms began 4 days prior to admission while he was in Jackson, Ms. He drove from Jackson to Abilene, TX the day after the symptoms began, where worsening of his dyspnea and chest pain prompted him to go to the emergency room. There he was diagnosed with pneumonia and placed on Levaquin 500 milligrams daily.
RFV	
Subj	
HPI	✓
Obj	
ROS	
Couns	
PE	✓
Results	
D/S	
Proc	
Plan	
Edu	
Other	

Companion

MERCURY, James
04-Apr-1984 (38y) | Male
NO KNOWN DRUG ALLERGIES

Office Visit - Allscripts, Provider, M.D.
Enc: 06-Dec-2022 | Acute Visit

TW Note

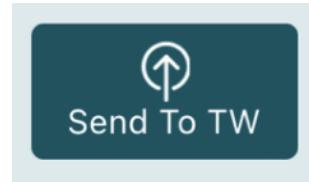
Subj	Vitals reviewed.
HPI	✓ Constitutional: Alert, calm, well developed, male. Height and weight are proportionate. No acute distress.
Obj	
ROS	HEENT: Pupils equal round, reactive to light and accommodation. Extraocular movements intact.
Couns	Neck: No carotid bruits.
PE	✓ Cardiovascular: Regular rate and rhythm. No murmurs, rubs, or gallops.
Results	Lungs: Diffuse bilateral crackles throughout lung fields. No wheezes. No accessory muscle use or cyanosis.
D/S	Extremities: Two plus pulses in upper and lower extremities. No lower extremity, pain or edema. Legs are symmetric in appearance.
Proc	
Plan	
Edu	Neurological: Alert and oriented to person, place and time. Able to communicate well.
Other	Psychological: Appropriate affect.

Companion Workflow

- Once the user has completed their dictation in TouchWorks Mobile best practice is to immediately send to TouchWorks EHR

- The dictation will be saved for 14 days if not sent
- There is no advantage in sending with each section or multiple times in most cases
- In a given note section, each subsequent dictation sent to TW is appended to the previous dictation sent to TW, until the note is finalized

- Once dictation text is sent to TouchWorks EHR, in mobile, the text is grayed out and time stamped, and the schedule icon will update to signify text was sent



Companion



MERCURY, James
04-Apr-1984 (38y) | Male
NO KNOWN DRUG ALLERGIES

Office Visit - Allscripts, Provider, M.D.
Enc: 06-Dec-2022 | Acute Visit

TW Note 

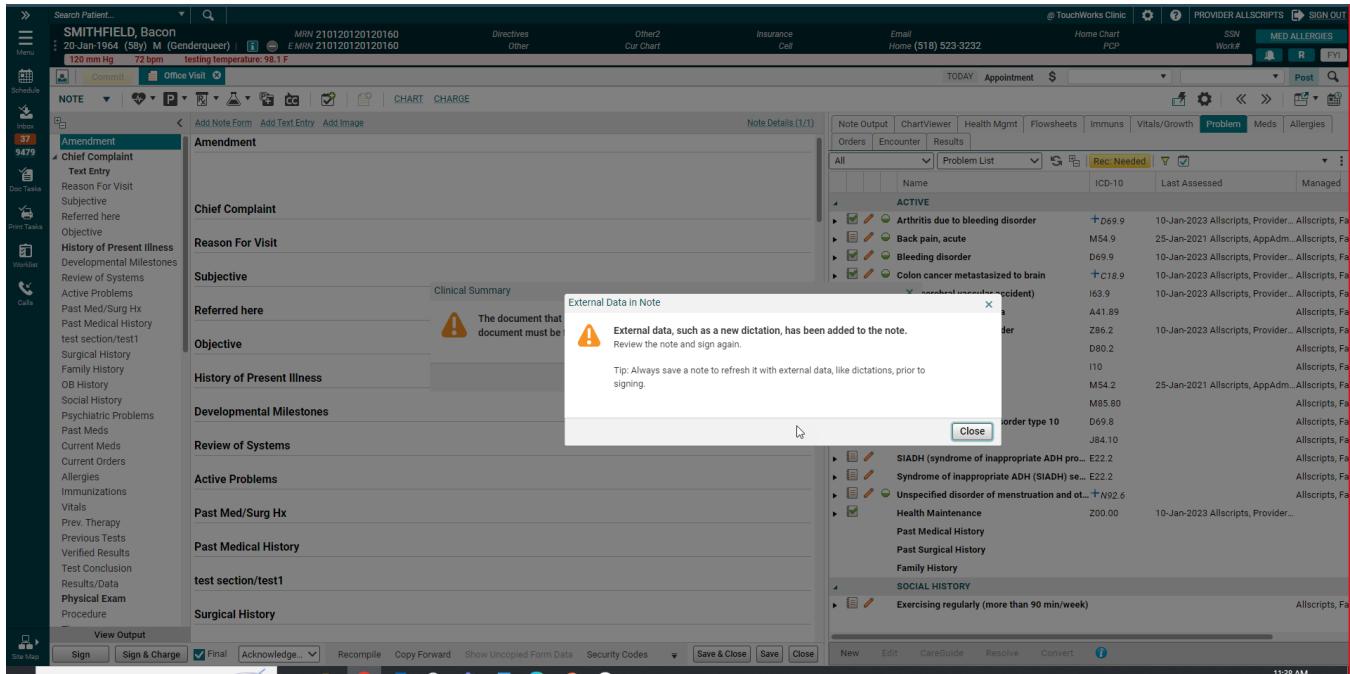
CC
RFV
Subj
HPI 
Obj
ROS
Couns
PE
Results
D/S
Proc
Plan
Add Text...

Send To TW  **Keyboard** **Next Section**



Base EHR Note in Edit – Save with Pending Mobile Dictation

- This is not user-specific
 - meaning if the nurse has the note in edit and saves and there is sent dictation in the queue, the note will be updated



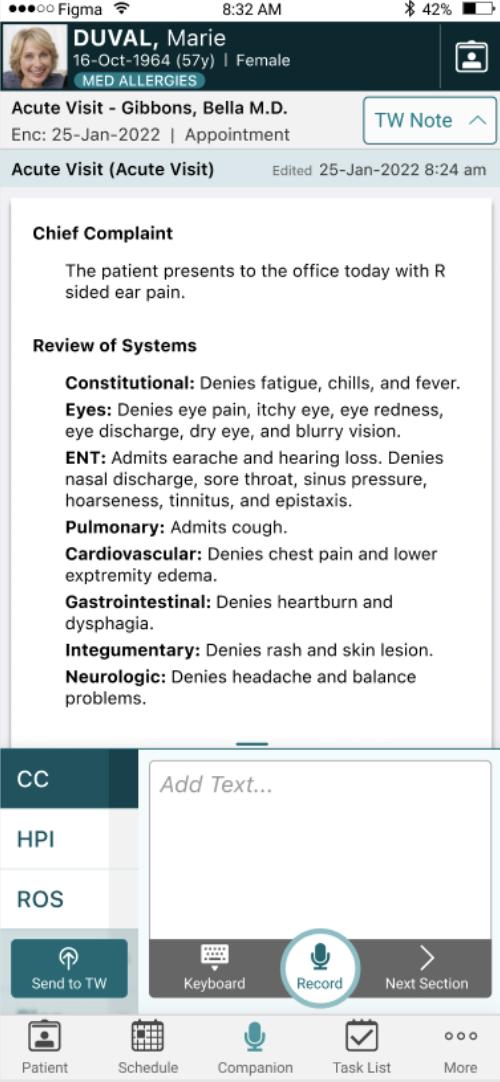
Base EHR Note in Edit – Save with Pending Dictation

- There is no notice in TouchWorks EHR that there is pending dictation from mobile
- This is not user-specific – meaning if the nurse has the note in edit and saves and there is sent dictation in the queue, the note will be updated

The screenshot shows the TouchWorks EHR software interface. The top navigation bar includes 'Search Patient...', 'MRN 210120120120160', 'Directives Other', 'Other2 Cur Chart', 'Insurance Cell', 'Email Home (518) 523-3232', 'Home Chart PCP', 'SSN Work#', 'MED ALLERGIES', and 'SIGN OUT'. The main window displays a note for patient 'SMITHFIELD, Bacon' (MRN: 210120120120160, DOB: 20-Jan-1964, Gender: M, Genderqueer). The note is in 'Edit' mode, with the 'Save & Close' button highlighted with a red box. The note content includes sections for 'Reason For Visit', 'Subjective' (Referred here), 'Objective', 'History of Present Illness', 'Developmental Milestones', 'Review of Systems', 'Active Problems', 'Past Med/Surg Hx', 'Past Medical History', 'test section/test1', 'Surgical History', 'Family History', 'OB History', 'Social History', 'Psychiatric Problems', 'Past Meds', 'Current Meds', 'Current Orders', 'Allergies', 'Immunizations', 'Vitals', 'Prev. Therapy', 'Previous Tests', 'Verified Results', 'Test Conclusion', 'Results/Data', 'Physical Exam', and 'Procedure'. The right side of the screen shows the 'Note Output' pane with a red box around the 'Macro' section, which contains text about a patient named 'Bacon Smithfield' and a note about a follow-up appointment. The bottom of the screen shows the 'View Output' and 'Sign' buttons.

Viewing existing note data in Companion Mode

- Tap the “TW Note” button to display the “primary” aka first note output of the note linked to this encounter as it was last saved in the base TouchWorks EHR
- The Text Input box will collapse down to allow user to view note content
- User can scroll and zoom on note
- User can continue to dictate while viewing the note, the **dictation will not display in note output**; the note output is not updated real time



The screenshot shows the TouchWorks Companion Mode interface. At the top, a patient profile for "DUVAL, Marie" is displayed, including her photo, date of birth (16-Oct-1964), gender (Female), and allergies (MED ALLERGIES). The time is 8:32 AM and the battery level is 42%. Below the profile, a "TW Note" button is highlighted. The main content area shows a summary of an "Acute Visit - Gibbons, Bella M.D." on "Enc: 25-Jan-2022 | Appointment". The visit is dated "25-Jan-2022 8:24 am". The summary includes sections for "Chief Complaint" (patient presents with R-sided ear pain), "Review of Systems" (constitutional, eyes, ENT, pulmonary, cardiovascular, gastrointestinal, integumentary, neurologic), and a "Text Input" field with a "Send to TW" button. A "Record" button is also visible in the bottom right of the input field.

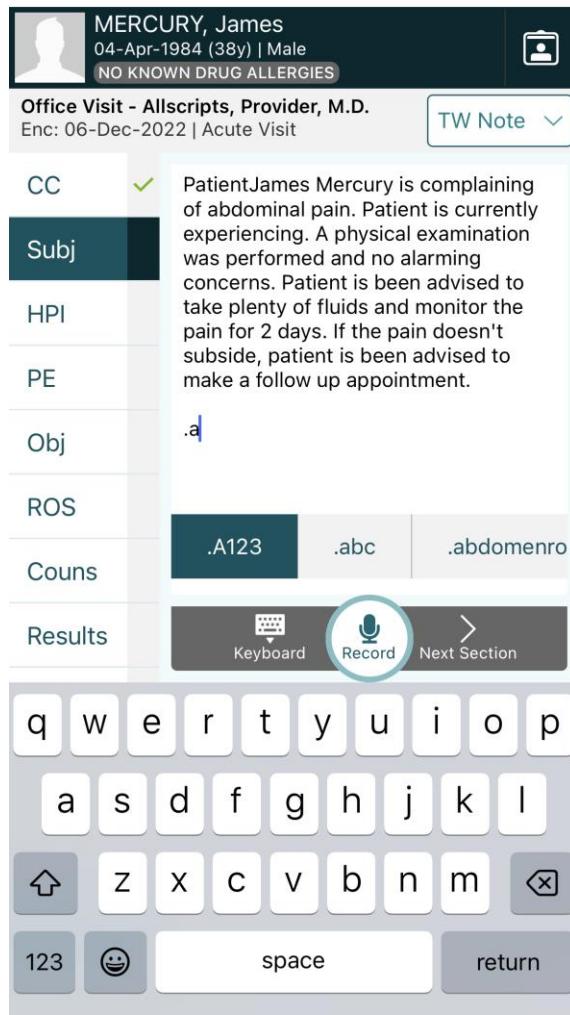
Punctuation Support

TouchWorks EHR Mobile does support punctuation commands and carriage return commands; it formats sentences with punctuation in most cases.

Supports commands for period, colon, semicolon, hyphen, comma, question mark, exclamation mark, bracket, parentheses BUT no “quotes”

In order to get a new line the user must use the exact command “new line”. To start a new paragraph a user can say new paragraph or duplicate the new line command, e.g., “new line, new line”

Note: use LMP or menstrual period or menstrual cycle but not last “period”, colon mass – will get : mass



MERCURY, James
04-Apr-1984 (38y) | Male
NO KNOWN DRUG ALLERGIES

Office Visit - Allscripts, Provider, M.D.
Enc: 06-Dec-2022 | Acute Visit

CC ✓
Subj
HPI
PE
Obj .a
ROS
Couns .A123 .abc .abdomenro
Results Keyboard Record Next Section

q w e r t y u i o p
a s d f g h j k l
z x c v b n m return
123 space

Typing and Using Macros

- User can use the Keyboard Button to input text or macros
- NOTE:** This Text Input Box is native to TouchWorks EHR Mobile not your device. Using the keyboard to edit text will behave differently than your native device. To highlight text for edit you must double tap your cursor and drag. There is no select all/copy/cut/paste option

How to Deploy Mobile Companion



No additional fee to use the mobile note companion feature, included with Mobile



Contact your CSE to learn more, set up a demo, purchase additional mobile licenses



Would love to find an interested client to pilot with Dr. Armstrong



Provider selection and workflow critical to success



Read the v22.1 mobile release notes and companion FAQ for more information on configuration and best practices

- Review [VOC recording on client forum](#) (Jan. 2023) Companion discussion for more info

Next Webinars



TouchWorks VoC Webinar

Mar. 8, 2023

[**Register Now**](#)



TouchWorks EHR Q2 Update Client Webinar

May 24, 2023

[**Register Now**](#)



QUESTIONS?



ASCENDING TO NEW HEIGHTS IN HEALTHCARE