



# TouchWorks® EHR Q1 Update Webinar

*Ascending to new heights in healthcare*

Feb, 22<sup>nd</sup>, 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

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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

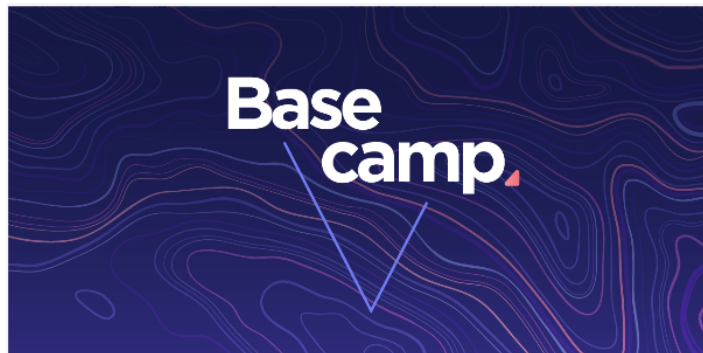
*Jeanne Armstrong, CMO, TouchWorks EHR*

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

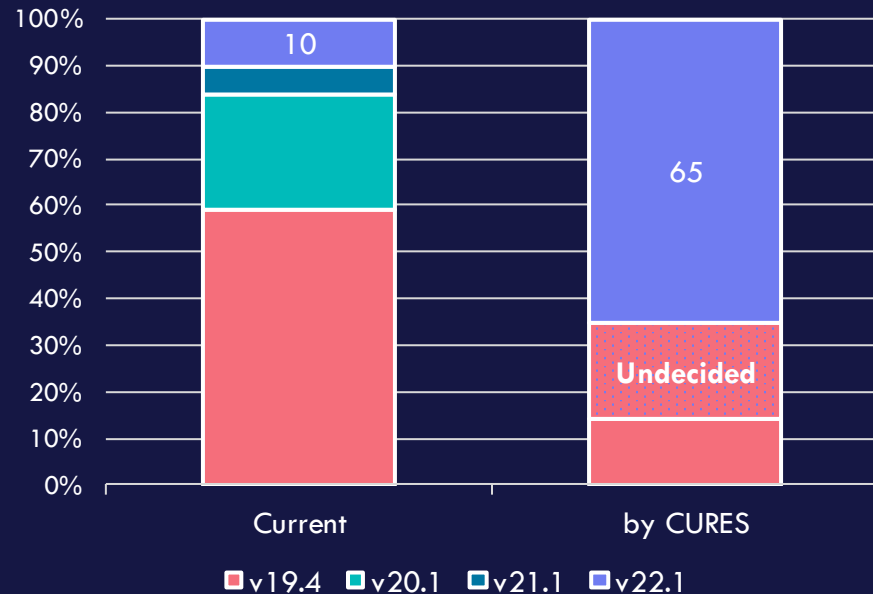
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*Sean Schulz, VP, Professional Services, TouchWorks EHR*

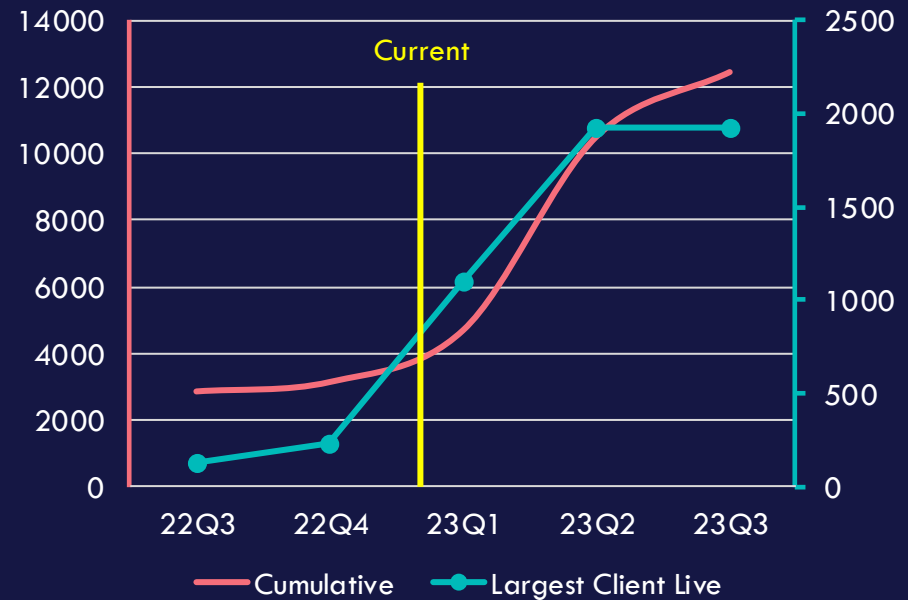
# Upgrade Updates

- v22.1 Adoption is Growing

## Client Versions



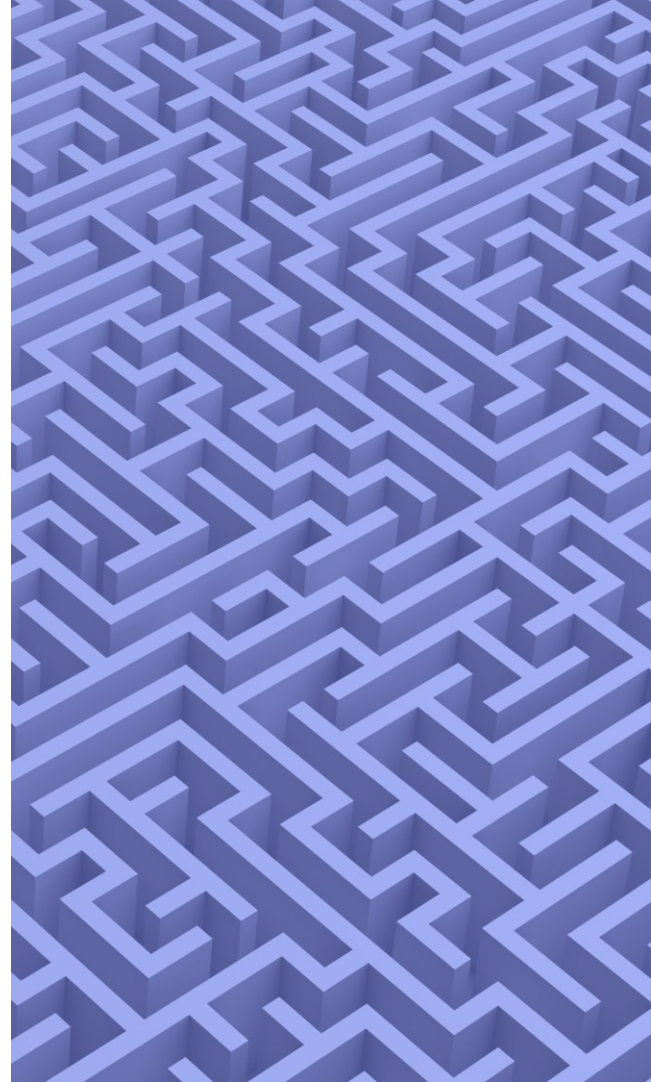
## New Stack Providers





# 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

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*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 +

## QUALITY IMPROVEMENT



- 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*
<b>Internally Found</b>	1423	535	476
<b>Fixed</b>	1415	517	440
<b>% Fixed</b>	<b>99%</b>	<b>97%</b>	<b>92%</b>
<b>Avg Days to Fix</b>	33.59	45.04	21.54
<b>Client Reported</b>	844	143	158
<b>Fixed</b>	803	131	129
<b>% Fixed</b>	<b>95%</b>	<b>92%</b>	<b>82%</b>
<b>Avg Days to Fix</b>	95.91	89.93	65.97
<b>Avg Clients</b>	2.39	2.40	2.23
<b>Fixed for One Client</b>	389	85	80
<b>% of All Fixed</b>	<b>48%</b>	<b>65%</b>	<b>62%</b>
<b>Found + Reported</b>	2267	678	634
<b>Total Fixed</b>	2218	648	569
<b>Total % Fixed</b>	<b>98%</b>	<b>96%</b>	<b>90%</b>
<b>Not Fixed</b>	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"> <li>• Client Issue Resolution</li> <li>• Increased WCAG support</li> <li>• SIM (Simple Image Management) aka scan</li> <li>• ePA &amp; Rx True Price Opt Out</li> <li>• Technical enhancement – exception handling, improved multiple threading, error initiative, deployment improvements</li> <li>• Conversion optimizations</li> <li>• Record destruction</li> <li>• Prenatal technical documentation</li> </ul>	<ul style="list-style-type: none"> <li>• Client Issue Resolution</li> <li>• SIM (Simple Image Management) <ul style="list-style-type: none"> <li>• Basic HIM tools</li> </ul> </li> <li>• Unified provider sign off workspace</li> <li>• Technical enhancements continue, note XML synchronization</li> <li>• Records destruction continues</li> <li>• MAR</li> <li>• Surgical history replacement</li> <li>• Enhancement Review**</li> </ul>	<ul style="list-style-type: none"> <li>• Past surgical history terminology migration</li> <li>• MAR replacement complete</li> <li>• Surgical history replacement</li> <li>• Technical enhancements</li> <li>• Vendor Library Updates</li> </ul>
Regulatory Features	<ul style="list-style-type: none"> <li>• EHI Export</li> <li>• eCR Reporting AIMS Approval</li> <li>• MVPs (MIPS Value Pathways)</li> </ul>	<ul style="list-style-type: none"> <li>• EHI Export</li> <li>• NCPDP support for proposed version</li> <li>• MVPs</li> <li>• TEFCA</li> </ul>	<ul style="list-style-type: none"> <li>• NCPDP</li> <li>• TEFCA/QHINs</li> <li>• ePA 2026 requirements</li> <li>• No surprises/AEOB/?</li> </ul>

# 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

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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.

	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.	

### 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

CC

HPI

Subj

Obj

ROS

Couns

PE

Results

D/S

Proc

Plan


Add Text...


Send To TW


Keyboard


Record


Next Section

 Patient

 Schedule

 Companion

 Task List 7 29

 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

The screenshot displays the 'NOTE ADMIN' interface with a sidebar on the left containing sections like 'Note Templates', 'Structured Content', and 'Sections'. The main area shows a form for '1 Ankle Follow-Up' with fields for 'Specialty', 'Gender', and 'Age Range'. A 'Note Input Template Properties' dialog box is open, showing settings for 'Document Type', 'Assign Specialties', 'Gender', 'Description', 'Filter Default Note Forms by Selected Specialty', 'Note Attributes', 'Security', 'Create Task', 'Force Amendment If', 'Note Visibility', 'Audit', and 'E & M'. The 'Allow Input from External Sources' checkbox is checked under 'Note Attributes'. The 'Note Visibility' section shows 'Visible on Saving' selected.

**NOTE ADMIN**

Note Templates | Structured Content

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

**Sections**

- Chief Complaint(s)
- History of Present Illness
- Review of Systems
- Active Problems
- Past Medical History
- Surgical History
- Social History
- Current Meds
- Allergies
- Physical Exam
- Results/Data
- Procedure
- Assessment

**Chief Complaint(s)**

Lock Cited List When: Note Finalized

Forms: \*\*\* Chief Complaint List \*\*\*

Assign Specialties: Orthopedic Surgery, Sports Medicine, Orthopedics

Gender: ☒ Both, ☐ Male, ☐ Female

Description: Ortho Ankle Follow-up (ss)

Age Range: [ ] Clear

☒ Filter Default Note Forms by Selected Specialty

**Note Attributes**

☒ Allow Input from External Sources

**Security**

Finalization Authority: Level 8 | Note Owner Authority: Level 8

Security Codes: [ ]

☐ Prompt to Route for Signature ☒ Create Note Icon in Schedule ☐ Permanently Lock Note when Finalized

**Create Task**

☐ Referring Provider Notification on Finalization  
☐ Patient Notification Task on Finalization  
☐ Review Covered Note on Finalization

**Force Amendment If**

☐ Annotation Added  
☐ Carbon Copy Added or Edited  
☐ Encounter Changed  
☐ Note Owner Changed

**Note Visibility**

☒ Visible on Saving  
☐ Visible on Initial Signing  
☐ Visible on Finalization

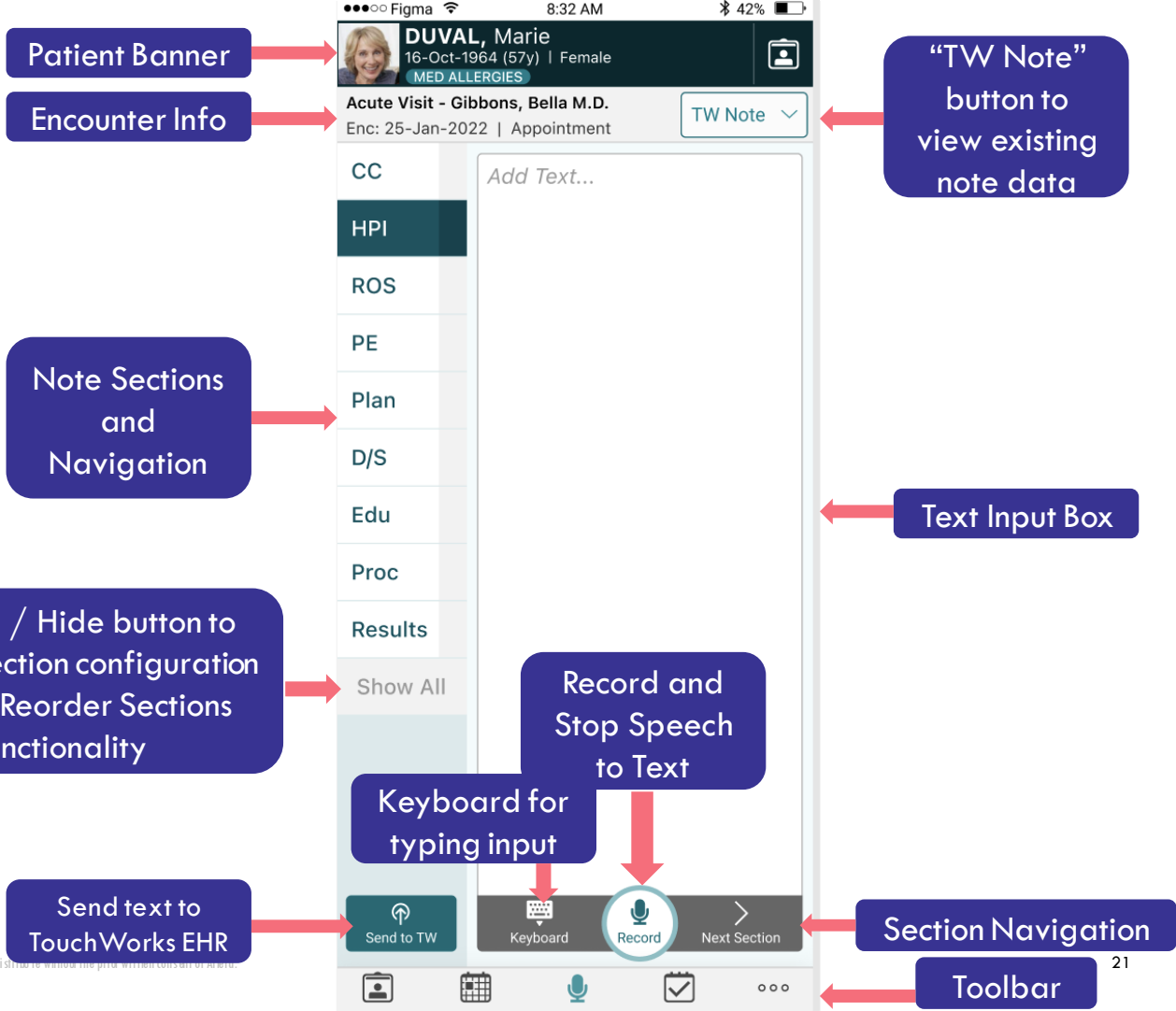
**Audit**

E & M

☐ Inactive











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

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

### Companion



SMITH, Cali L.  
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Office Visit - Allscripts, Provider, M.D.  
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TW Note ▾

RFV

CC

HPI

Subj

Obj

ROS

Couns

PE


Results


D/S


Proc


Plan


Add Text...


Send To TW


Keyboard


Record


Next Section

Patient

Schedule

Companion


Task List

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

RFV

Subj

HPI

Obj

ROS

Couns

PE

Results

D/S

Proc

Plan

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.


Send To TW

Keyboard

Record

Next Section

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

HPI

Obj

ROS

Couns

PE

Results

D/S

Proc

Plan

Edu

Other

Vitals reviewed.

Constitutional: Alert, calm, well developed, male. Height and weight are proportionate. No acute distress.

HEENT: Pupils equal round, reactive to light and accommodation. Extraocular movements intact.

Neck: No carotid bruises.

Cardiovascular: Regular rate and rhythm. No murmurs, rubs, or gallops.

Lungs: Diffuse bilateral crackles throughout lung fields. No wheezes. No accessory muscle use or cyanosis.

Extremities: Two plus pulses in upper and lower extremities. No lower extremity, pain or edema. Legs are symmetric in appearance.

Neurological: Alert and oriented to person, place and time. Able to communicate well.

Psychological: Appropriate affect.

Send To TW

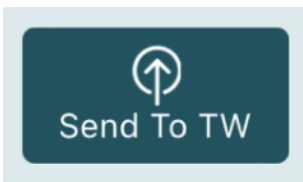
Keyboard

Record

Next Section

# 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 it 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 v

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

08-Dec-2022 02:44 PM  
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.

Add Text...

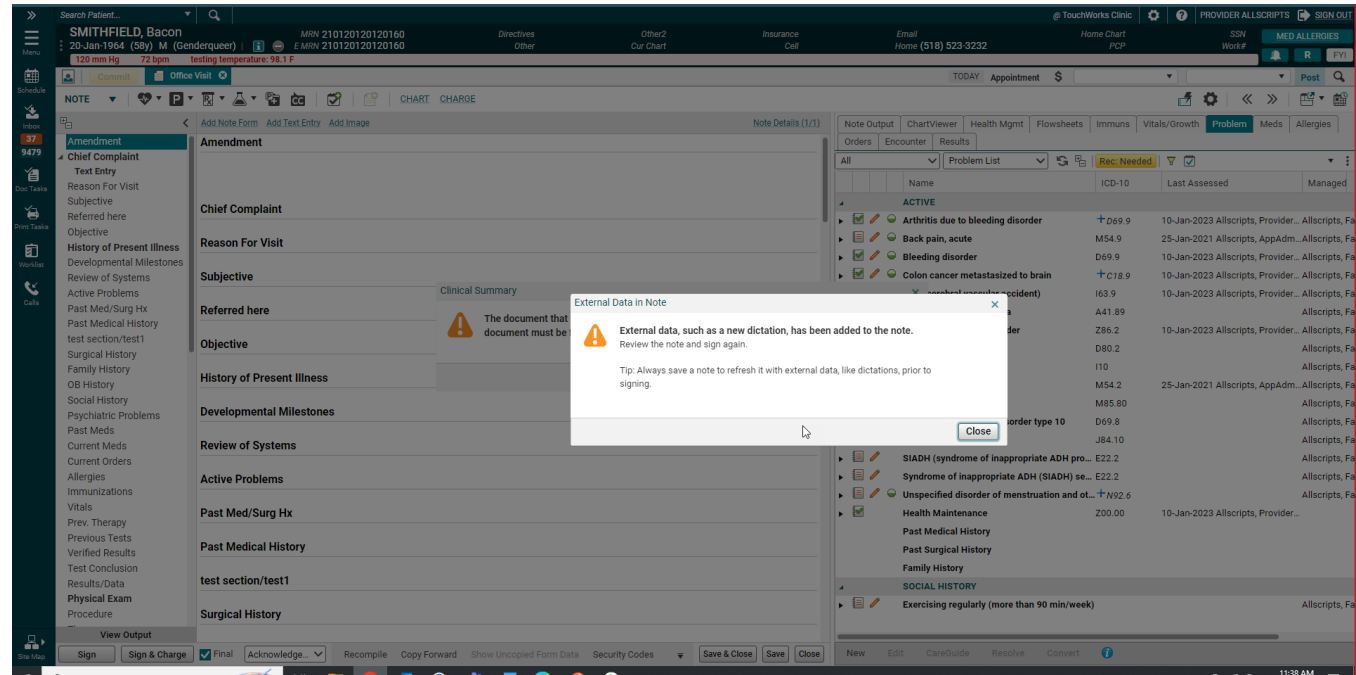
Send To TW Keyboard Record Next Section

Patient Schedule Companion Task List More



# 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



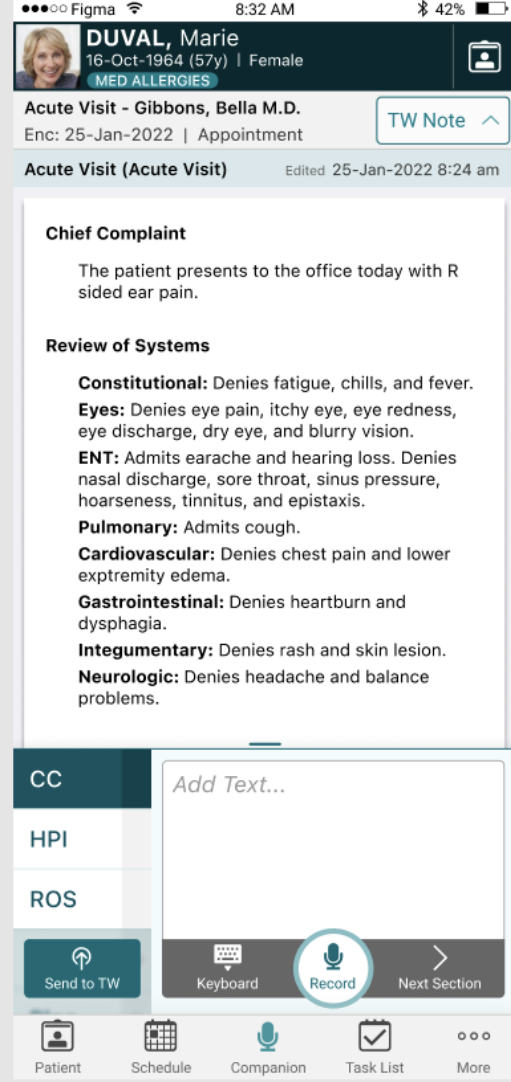
# Base EHR Note in Edit – Save with Pending Dictation

- 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 displays the TouchWorks EHR interface for a patient named SMITHFIELD, Bacon. The top navigation bar shows patient details, including MRN 210120120120160, gender M, and insurance Cell. The left sidebar contains a menu of note sections, with 'Reason For Visit' selected. The main content area shows the 'Reason For Visit' section, which includes fields for 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, and OB History. A red box highlights the 'Save' button in the bottom right corner of the interface.

# 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



# 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

TW Note ▾

CC	✓	PatientJames Mercury is complaining of abdominal pain. Patient is currently experiencing. A physical examination was performed and no alarming concerns. Patient is been advised to take plenty of fluids and monitor the pain for 2 days. If the pain doesn't subside, patient is been advised to make a follow up appointment.
Subj		
HPI		
PE		
Obj	.a	
ROS		
Couns		
Results		<div>.A123 .abc .abdomenro</div> <div>  Keyboard            Record            Next Section         </div>



## 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, include 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