



TouchWorks® EHR Q3 Update Webinar

Bringing next-level healthcare within reach

August 20, 2025

Housekeeping



Recorded session, listening-only mode, lines are muted by default



Ask questions via Q&A panel or **'Raise your hand'** option to ask questions live



Watch for a follow-up email containing the webinar recording or visit our webinar page



Please take a few moments to complete the webinar survey!

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.

Agenda

August 20, 2025

01

Welcome & Agenda

Beth Thompson, VP Client Success

02

Key Updates You Need to Know

Sean Schulz, VP Operations

Aaron Armstead, Director, Solutions Management – Regulatory

03

Looking Ahead: Releases & Roadmaps

Jeanne Armstrong, TouchWorks CMO

04

Q&A

05

Wrap Up

Beth Thompson, VP Client Success

Key Updates You Need to Know

Schedule, Prepare and Plan for Success!

Your Feedback in Action

In our Spring NPS survey, you asked for improvements in stability, support, and transparency. Here's how we're responding.



Platform Stability

We expanded automation and continuous testing, driving more predictable, reliable releases.



Support Experience

AI-powered tools, dedicated Support Leads, and a new structure for faster, more consistent responses.

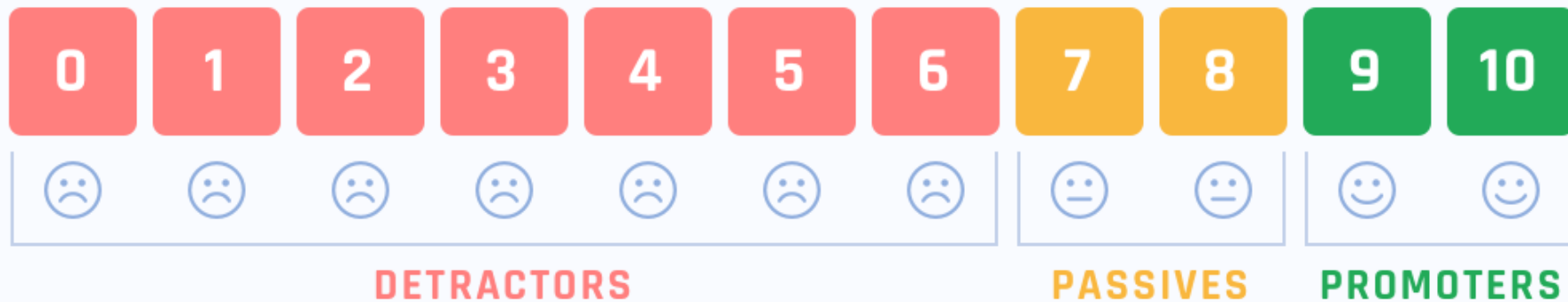


Partnership & Transparency

More opportunities to shape priorities – through feature input sessions, sharper quarterly webinars, and upcoming Strategic Partnership Reviews.

Your Feedback Shapes Our Direction

Fall NPS Survey Launches **Oct 14th**




Release Reminders

2024.3+	2025.3	2025.4	2026.1
2025 Reporting <i>Hotfix Required*</i>	2025 Reporting <i>Hotfix Required*</i>	2025 Reporting <i>Included</i>	2025 Reporting <i>n/a</i>
2026 Reporting <i>n/a</i>	2026 Reporting <i>Supplemental FHIR Update Required**</i>	2026 Reporting <i>Supplemental FHIR Update Required**</i>	2026 Reporting <i>Included</i>
Integrated Scan <i>n/a</i>	Integrated Scan <i>Included (2025.3.1)</i>	Integrated Scan <i>Included</i>	Integrated Scan <i>Included</i>
Note+ w/ Ambient Listening <i>n/a</i>	Note+ w/ Ambient Listening <i>Contract Required (2025.3.1)</i>	Note+ w/ Ambient Listening <i>Contract Required</i>	Note+ w/ Ambient Listening <i>Contract Required</i>

*before **12/31/2025**

before **first day of 2026 reporting period

Integrated Scan Prep

 Client Portal

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Introducing Integrated Scan: A New Era for TouchWorks Document Management

BLOG

...

RS

by Rob Sloan **ENTHUSIAST**

created @ 05/07/2025 03:22 PM • (edited @ 05/08/2025 02:37 PM) in TouchWorks

Introducing Integrated Scan: A New Era for TouchWorks Document Management

We are thrilled to announce the upcoming release of TouchWorks 2025.3, featuring the highly anticipated **Integrated Scan** functionality. This transformative update marks a significant leap forward in streamlining document management within the TouchWorks Electronic Health Record (EHR) system. By embedding scan capabilities directly into the EHR, Integrated Scan eliminates the need for separate applications, simplifies workflows, and enhances efficiency for your clinical teams.

To kick off your preparation for Integrated Scan in TouchWorks 2025.3, **act now** by reviewing the instructional video and starting the cleanup of file cabinets, unmapped folders, and open batch scans as outlined in the provided resources. **Immediate action** is critical to ensure a smooth transition and avoid disruptions during activation.

What is Integrated Scan?

Integrated Scan replaces the legacy TouchChart (ImpactMD) application with a modern, AI-ready platform that seamlessly integrates batch and direct-to-patient scanning workflows. This built-in solution allows users to capture, categorize, and file documents without toggling between systems or managing separate logins. The result? A more cohesive and efficient experience within the familiar TouchWorks environment.

Key benefits include:

- **Streamlined Workflows:** Document management is now fully embedded in the EHR, reducing complexity and saving time.
- **Enhanced Accessibility:** Scan and file documents directly to patient charts without leaving the clinical workspace.
- **Future-Ready Design:** Built with AI capabilities in mind, Integrated Scan is poised to support evolving healthcare needs.

Preparing for a Smooth Transition

The rollout of Integrated Scan requires proactive preparation to ensure a seamless transition. To help you get ready, we've outlined critical pre-engagement steps in our recent instructional video ([available here](#)). These steps focus on cleaning up existing data in TouchChart, including file cabinets, unmapped folders, and open batch scans, to align with the new system's structure.


Key Preparation Steps

My Forums

TouchWorks

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Featured Content

 Introducing Integrated Scan: A New Era for TouchWorks Document Management

Document Management

Posted in TouchWorks


Featured by Rob Sloan from May 9, 2025 to

 2025 TouchWorks EHR Feature Feedback Webinar

2025 TouchWorks EHR Feature Feedback Webinar

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 Introducing Waypoint: In-System Guided TouchWorks Users

Introducing Waypoint: In-System Guided TouchWorks Users

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 TouchWorks 2025.1 Readiness: Steps You Can Take Today to Prepare

TouchWorks 2025.1 Readiness: Steps You Can Take Today to Prepare

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CLEAN-UP EFFORT TIMELINE

Integrated Scan

Pre-Engagement

Release Project KO

Activation



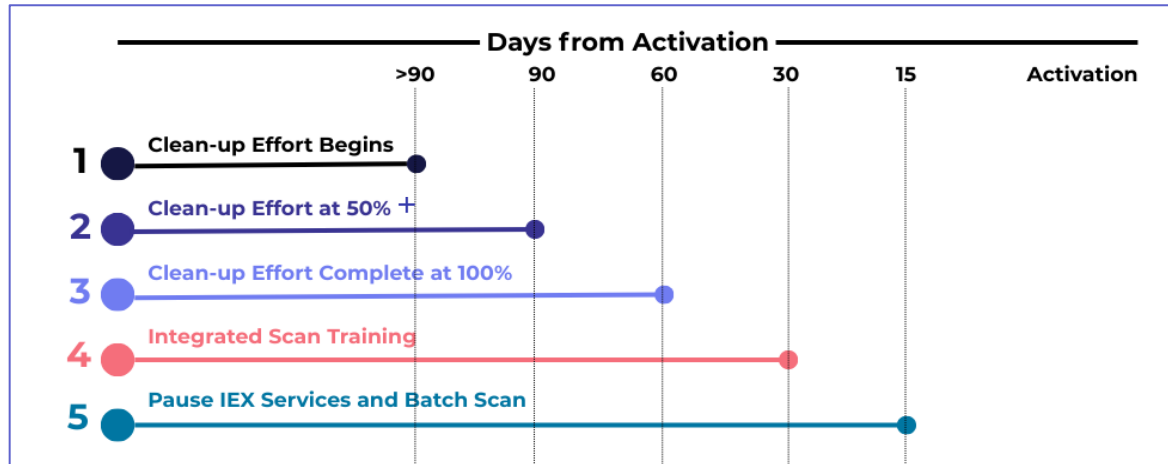
- **Phase 1** Script Run
- Start clean-up

- **Phase 2** Script Run

- **Phase 3** Script Run

- Integrated Scan
Activation Readiness

- Transition to
Integrated Scan



Please review [KB1561381](#) for additional pre-engagement script details in preparation for the 3 Phases outlined in the following slides.

Veradigm Separation Continues



FHIRr4 Reinstall

- FHIR Downtime
- Like4Like Test/Prod
- All During Business Hours
- FHIRr2 Deprecated
- New LMP URL
- No 3rd Party Changes
- Completion ETA: 8/31/2025

KB1562367



Unity/Ubiquity Reinstall

- Unity/Ubiquity Downtime
- Like4Like Test/Prod
- Test During Business Hours
- Production After Hours
- No 3rd Party Changes
- Proactive Support Cases starting in September

KB1562369



ACDM Update (Direct Messaging)

- Cutover Script Testing Continues
- MedAllies endpoint update ongoing
- Like4Like Test/Prod, support case will be opened.
- Full deployment planned by October end.

KB1561791


Release Reminders

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Note+ w/ Ambient Listening <i>n/a</i>	Note+ w/ Ambient Listening <i>Contract Required (2025.3.1)</i>	Note+ w/ Ambient Listening <i>Contract Required</i>	Note+ w/ Ambient Listening <i>Contract Required</i>


*before **12/31/2025**


before **first day of 2026 reporting period


2025 Regulatory Update

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 **PRODUCT ALERT**

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2025.3 Upgrade
Smooth Transition
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 2025 TouchWorks
Feedback & Survey
Posted in TouchWorks

2025 Reporting Period - Potential Action Needed

 **by David Guay** **ENTHUSIAST**
created on 08/12/2025 02:07 PM in TouchWorks

TouchWorks Clients,

During our recent ONC certification review, we identified a CCD (CCDA) issue in versions 2024.3 and above. CCDs generated via API were missing required sections: Assessment Narrative, Plan Narrative, and Clinical Notes. We have developed a fix for this issue, which is included in version 2025.3 and later, and available as a hotfix starting with version 2024.3.

What This Means for You

To be compliant, you must be on a certified version of TouchWorks during your 180-day reporting period.

- If your original reporting period began before July 4, 2025, and you were using version 2024.3, you must take the CCD hotfix and select a new continuous 180-day period to be compliant
- If your reporting period is July 4 to December 31, 2025, and you are using version 2024.3, you must take the CCD

Regulatory Compliance Reminders

2024.3+	2025.3	2025.4	Key Compliance Takeaways
2025 Reporting <i>Hotfix Required</i> 2024.3.3 2025.1.4 2025.2.2	2025 Reporting <i>Hotfix Required</i> 2025.3.1	2025 Reporting <i>Included</i>	2025 Reporting If on a version prior to 2025.4, HF is required by 12/31/2025 .
	2026 Reporting <i>Requires</i> Supplemental FHIR Update	2026 Reporting <i>Requires</i> Supplemental FHIR Update	2026 Reporting Upgrade to 2025.3.1 + Supplemental FHIR Update is required before the first day of your 2026 reporting period.

Rally with us: Staying in the know

Q3 Regulatory Webinar

We're in this together!



September 11 at 12 p.m. ET

Register Now

Topics

- 2025 Compliance Reminder (HOT FIX)
- Looking Ahead, 2026 Reporting (FHIR Supplemental Update)
- FHIR Oversight Program
- Ever Evolving Regulatory Landscape
- Exciting, NEW CHPL Listing Strategy

And more ...

Looking Ahead: Releases & Blueprints

Empowering You to Thrive

Product Releases



TouchWorks® EHR

- **Currently Available:** 2025.3
- **Next Release:**
 - Version 2025.4 (Oct 14, 2025)



Altera Prenatal™

- **Currently Available:** 22.2
- **Next Release:**
 - TBD



TouchWorks® EHR Mobile

- **Currently Available:** 25.1
- **Next Release:**
 - Version 25.1.2 (Sept 3, 2025)
 - Version 25.4 (Oct 14, 2025)

2026 Release Dates

2026.1
1/21/26

2026.2
4/29/26

2026.3
7/22/26

2026.4
10/28/26

Empowering Independent Practices to Thrive



Clinical

- Reduce Cognitive Burden
- Minimize provider workload and streamline workflows



TouchWorks Note+ (2025.3 GA)



Virtual Medical Assistant



Financial

- Ensure financial stability
- Improve reimbursement
- Reduce operational costs



RCM Services



Integrated PM System



Interoperability

- Break down communication barriers
- Seamless data sharing outside of my EHR and other care teams



CareInMotion (dbMotion)



Analytics/Reporting

- Drive actionable insights
- Meet compliance requirements



ACDL (Altera Clinical Data Lake)



Clinical Reporting



Patient Engagement

- Enhance patient experience
- Streamline intake, scheduling and provide personalized insights



Portal



Self-schedule



Intake

Regulatory Certification

Turning Your Requests into Reality

Discover what's new in TouchWorks® EHR and get a glimpse at the plans for upcoming releases, shaped by our clients' most common requests.

Release Insights

- <https://go.alterahealth.com/touchworks-releaseinsights>

Release Insights

TouchWorks® EHR 2025.3
[2025.3](#)

TouchWorks® EHR 2025.2
[2025.2](#)

TouchWorks® EHR 2025.1
[2025.1](#)

TouchWorks® EHR 2024.3
[2024.3](#)

Release Highlights

TouchWorks® EHR 2025.3
[End Users](#) [Administrators](#)

TouchWorks® EHR 2025.2
[End Users](#) [Administrators](#)

TouchWorks® EHR 2025.1
[End Users](#) [Administrators](#)

TouchWorks® EHR 2024.3
[End Users](#) [Administrators](#)

Commitment to enhancing the client experience.

We're excited to share these requested features and enhancements **available Jul. 8, 2025.**



Integrated Scan replaces legacy tools with embedded TouchWorks workflows, enabling secure scanning, error recovery, and future-ready enhancements with minimal disruption.



Reduce documentation burden and refocus on patient care with **TouchWorks Note+** leveraging AI-driven ambient listening, dictation, and keyboard entry to generate structured and codified clinical documentation.



Enrich and personalize patient communication by **displaying the 'Preferred Name' on the patient banner and optionally in print templates.**



Get ahead on regulatory compliance with upcoming standards **replacing 'Birth Sex' with 'Clinical Use Sex'** in patient profiles and preferences.



Meet USCDI v3 standards by **designating and documenting results as Disability Status health status assessments** to better understand patient needs.



Ensure interoperability with future standards by allowing **classification of TouchWorks orders to a regulatory category.**



Enhance problem list management with **reinstated problem conversion and transition options, and new 'Refine Problem' functionality** for improved searching.



Enforce completeness and standardization in charting by **requiring anatomical site information when documenting injectable locally-defined vaccines.**



Efficiently resolve 'stuck' tasks with the **reinstated 'Entered in Error' option for unmatched patients and overdue orders.**



Reliably print immunizations recorded with a non-specific 'fuzzy' administered date from Immunization Viewer.



Record precise doses with up to three decimal places, eliminating workarounds and enhancing accuracy.



Reduce administrative overhead **by preventing unnecessary encounter creation when viewing Rx Renew Request tasks.**

Note+ With Ambient Listening

Note+ will continue to expand with new capabilities

- Core enhancements (Quippe forms, outputs, templates) with a Note+ with Ambient Listening subscription.
- Advanced AI-driven features (e.g., smart ordering, TouchWorks Studio). Final packaging details will be shared before each release

2025.4 Highlights

- TW Mobile as an ambient listening device – mobile transcript
- Security for non licensed users to start and edit note (without AI and Ambient)
- User directed, custom AI prompt updates to select note sections
- Ambient listening note update features
- Cite all/remove all options
- Proof of concept, TouchWorks Studio demonstration
- Displaying multiple vitals
- Ability to voice - dictate in entry pad
- Phase 1 of Mobile Photos

From 2025.4 Into 2026: Capabilities to Help Care Teams Thrive



Meaningful Enhancements

- Medication Search
- Patient Preferred Lab
- Pharmacy and Lab Display ACI/Chart Component
- Immunization Grid Most Recent to Oldest
- Referral Faxing Enhancements
- Rename Inbound Documents
- HCC Enhancements



Building the Foundation for AI

- AI Prompt Infrastructure
- TouchWorks Studio -
- AI Feature Enhancements
- Problem Conversion Map



Reporting and Insights That Matter

- Interoperability
- Gaps in Care
- Incidental Finding Tracking
- Ad Hoc Reporting
- Compliance Programs

2025.4 Enhancements You Asked For

- New Option to default patient preferred lab in patient profile
- Patient pharmacies and preferred lab display on clinical desktop components and ACI and Banner*
 - Landmark Display, “Confirm” to update last updated date
- Ability to fax medication list (or medication profile)
- Fax dialogs default to referring provider
- Immunization grid view most recent to oldest
- **Ability to fax referral order requisition and attachments
- Orders Chart Viewer Component – order by type now displayed by (OID) order type classification
- Admin tool color options to differentiate test, prod, etc
- Pharmacy Search – filtered incremental search in site
- Rename Direct Message Imported CCD XML manifestations
- HCC configuration to display v28 only, tool tip improvements

2026 - Using Forms for Problem Data Entry

Add Clinical Item

ALLSCRIPTS, Ashley 24-Jun-1992 (33y) F

History Builder Orders

Problems Medications Orders Allergies

Social History Alpha

Problems

- death in family
- social drinker
- Denied: History of serious illness in family

Life Circumstances and Events

- ☒ death in family
- ☒ loss of friendship
- ☒ death of close friend
- ☒ family disruption
- ☒ family problems
- ☒ serious illness in family
- ☒ recent relocation
- ☒ recent emotional stress from serious financial problems
- ☒ problems related to housing and economic circumstances

DUR Alerts: Drug-Drug (0) | Prior Adverse Reactions (0) | Disease (0) | Duplicate Therapy (0) | Dose (0)

OK Cancel

Medical History View

ALLSCRIPTS, Ashley MRN 120831170215813 Home PCP EMRN 120831170215813 Insurance Allscripts Insurance - CMS Managed Care Preferred Name ALLERGIES UNKNOWN

24-Jun-1992 (33y) F | Commit 17-Jun-2025 Allscripts, Provider Chart Update Post

MEDICAL HISTORY ONLY_PR... CHARGE

Problem-Medical History only Problem-All Default Problem-Active Default Problem-Medical History-Default Problem-No Medical History Title

	Name	ICD-9	ICD-10	Last Assessed	Managed By
ACTIVE					
▶	Abdomen enlarged	789.30	R19.8	20-Jan-2025 Allscripts, AppAdmin	Allscripts, Family Medicine (Family Medicine)
▶	Acute upper respiratory infection	465.9	J06.9	13-Apr-2023 Allscripts, Provider (Family Medicine)	Allscripts, Provider (Family Medicine)
▶	Biallelic mutation of ABCD3 gene	V84.89	Z15.89	23-Jul-2024 Allscripts, AppAdmin	Allscripts, Family Medicine (Family Medicine)
▶	History of Dengue without warning signs	061	A90	23-Jul-2024 Allscripts, AppAdmin	Allscripts, Family Medicine (Family Medicine)
▶	Diabetic foot	250.80	E11.8	22-Jul-2024 Allscripts, NoProblem M (Family Me...)	Allscripts, Family Medicine (Family Medicine)
▶	Diabetic ketoacidosis with coma associated with diabetes mellitus du...	249.31	E08.11	22-Jul-2024 Allscripts, NoProblem M (Family Me...)	Allscripts, Family Medicine (Family Medicine)
▶	Diabetic osteomyelitis	250.80	E11.69	23-Jul-2024 Allscripts, AppAdmin	Allscripts, Family Medicine (Family Medicine)
▶	History of upper respiratory infection	V12.09	Z87.09	25-Oct-2023 Allscripts, Provider (Family Medicine)	Allscripts, Provider (Family Medicine)
▶	Non-insulin dependent type 2 diabetes mellitus	250.00	E11.9	13-Apr-2023 Allscripts, Provider (Family Medicine)	Allscripts, Provider (Family Medicine)
▶	Nonintractable epilepsy with partial complex seizures	345.40	G40.209	11-Jan-2024 Allscripts, AppAdmin	Allscripts, Family Medicine (Family Medicine)
▶	Health Maintenance			24-Oct-2023 Allscripts, Provider (Family Medicine)	Allscripts, Provider (Family Medicine)
PAST MEDICAL HISTORY					
▶	History of Acute asthma	493.90	J45.909	30-Mar-2021 Allscripts, Provider (Family Medicine)	Allscripts, Family Medicine (Family Medicine)
▶	History of Dengue without warning signs	061	A90	23-Jul-2024 Allscripts, AppAdmin	Allscripts, Family Medicine (Family Medicine)

New Edit CareGuide Impression Assessment Management Reconcile Reconcile Hx



TouchWorks Studio

Innovation at the speed of care

A platform embedded within TouchWorks EHR that provides access to a growing library of small, targeted AI tools designed to solve specific, everyday challenges and can be selectively enabled to meet each organization's needs.

TouchWorks Studio brings innovation directly into clinical workflows, transforming how healthcare organizations deploy new capabilities - via a single subscription.

go.alterahealth.com/2025touchworksclientseries

Your Voice in Upcoming HCTC Sessions



Tips & Tricks

- Share your favorite tip, trick, or workflow shortcut
- We'll credit you during the session
- There may be prizes for the best tips as voted by your peers!



Operational Oversight Strategies

- Task monitoring
- Note completion
- Results review
- Onboarding oversight

1-2 Client Co-presenters



Calling All Super Testers

- Co-present best practices & lessons learned
- Share misses
- Build confidence before a go live
- What do you different?



Industry Panel

- Where is the Industry Going?
- Discuss challenges, opportunities, next steps

Seeking 3 client panelists



Solutions & Strategies

- Have you solved a tricky workflow or developed a strategy that works?

Share it with peers—co-present with us.



QUESTIONS?

Next Webinars



Feature Feedback & Mastermind Webinar

Sep. 10, 2025

[Register Now](#)



TouchWorks Regulatory Rally Webinar

Sep. 11, 2025

[Register Now](#)



TouchWorks Q4 Update Webinar

Nov. 19, 2025

[Register Now](#)



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2025

Save the Date!

HCTC 2025

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Dec. 2 - 4, 2025*



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