



Upgrade Assistance Services for TouchWorks EHR

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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, determining proactively what technologies and services are needed to fulfill client's needs.

- Services delivered by an MSP are delivered by employees located at client's 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



without the prior written consent of Altera.

Healthcare 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
operational inconsistencies
in technology, processes,
policies, roles, and more



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



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



Clients & staffing

100 Managed Services Clients
2,100+ Managed Services Staffing (globally)



Service desk support

23K+ Contacts/Month
~13K First Call Resolution -
>55% - FCR All Tickets
99% - FCR Qualified Tickets
4.88/5 CSAT



Applications

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



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 ongoing client operations related to HIT solutions

BROAD SCALE, CUSTOMIZABLE SERVICES



IT Outsourcing
(ITO) – Full Shop



ITO – Applications



Staff
Augmentation –
Specific Roles



Network/
Infrastructure
Services



Integration Services

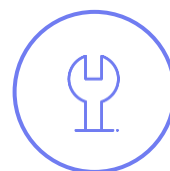


Global Managed
Services Bank of
Hours

FOCUSED, PACKAGED SERVICES



IT Service Desk



Upgrade
Assistance Service



Testing Center of
Excellence



Revenue Cycle
Center of
Excellence



Business Continuity
Service

TW Upgrade Assistance Services

Client Upgrade-Related Responsibilities

Configuration Workbook
Review

Impact analysis and TW
Configuration changes as
per the release notes

Enhancements/ New
Functionalities
implementation

Clinical Workflow changes
and implementation; Assess
and Integrate Workflows
and features

Retro-fit Interface and
Report Customizations
impacted by the upgrade

Enhancement documentation

Test scripts development &
documentation

Testing – End-to-End Clinical
Workflow testing;
Enhancements Testing; TW -
Surround Solution
Regulatory

Training documentation for
End Users

End User Training Delivery

Production Deployment

Post-Production Support



Upgrade Assistance Services

- Robust set of specialized micro-services provided by the Altera Managed IT Services teams that allows a client to offload many of the traditional 'client-side' responsibilities of an upgrade in order to focus on activities that are best suited for onsite presence
- Creates an effective, consistent, and price conscious means to prepare for upgrades by allocating many of the intensive, application-oriented upgrade preparations to the Altera team, including items such as
 - Configuration and Testing
 - Interfaces
 - Reports and Customizations
- Provided by experienced Clinical, Integration, Custom Services & Testing resources
- The MS team serves as an extension of the client team when interacting with Altera Professional Services



TouchWorks/APM – Upgrade Assistance Services



Configuration

- Configuration Workbook and review
- Enhancements/ New Functionalities implementation
- Assess and Integrate Future Workflows and features
- Test Plan Creation



Interface, Reports, Customizations

- Retro-fit Interface and Report Customizations impacted by the upgrade
- Thorough connectivity – unit & Integration testing
- Enhancement documentations; Test scripts development



Testing

- End-to-End Workflow testing
- Scan Testing
- Product release - Resolved Issues testing
- Enhancements Testing
- TW - Surround Solution (Prenatal, FollowMy Health, Lab/Rad)
- TW - Meaningful Use Functionality Testing

Configuration Activities

Managed Services can provide experienced Clinical resources to perform client-owned upgrade responsibilities to

- Review the Upgrade configuration workbook and assist the client in making decisions for the following
 - Acceptance of an impact assessment that requires configuration changes
 - Impact assessment on Clinical Workflows and plan to retro-fit them
 - Plan and develop end-user notifications
- Develop action plans and implement them for
 - Configuration changes in all environments as per the upgrade plan
 - Test script development and execution
 - End User training and communication
 - Coordination with Integration and Custom Services development wherever required to complete the clinical workflow modifications

Click to Review Category, Build Location to review your work				Click to preview				Click to preview				Click to preview			
Item	Task	Build Location	Build Activity	Definition	Required	Required	End User	End User	End User	End User	End User	End User	End User	End User	End User
203	Admin	Performance > System > Miscellaneous (Subkey: Subkey)	Separate HEDIS, performance to script messages	The HEDIS for each request, without a subkey, is built using the base HEDIS and adding the applicable script type and account IDs. This preference accommodates changes made to the way the HEDIS script and accounts messages from HEDIS to ensure accurate messaging.	Yes	No	No								
204	Admin	Data update	Pharmacy HEDIS included per Data update	Order prescription messages can be sent after the upgrade, the Pharmacy HEDIS will be included. Pharmacy HEDIS is now a requirement for script messaging. Errors with updates such that the HEDIS Pharmacy update on Data base completed as part of the upgrade in Test and Prod.	Yes	No	No								
205	Admin	Chart Structure > Chart Section	CDI Import of Unattended Document	Previously, when an unattended Clinical Exchange Document (not a known "CDI Unattended Template") located after the HEDIS, the document was not able to be saved or printed. These documents were dropped in Chart View as "CDI Import from External".	Yes	Yes	No								

Type	Category	Feature Name	Client Decision	Config Req'd	Test Env Stk	Prod Env Stk
27	Enhancement	Admin	Administration changes		X	
40	Enhancement	CCDA	CCDA system changes		X	
48	Enhancement	Charges/Enc	Single sign Change values	X	X	
49	New Feature	Charges/Enc	Sign note before submit encounter/charges	X	X	
50	New Feature	Charges/Enc	Bypass MRA task list by applet type, generate charge by applet type	X	X	
51	New Feature	HEDIS	HEDIS Reminders	X	X	
52	New Feature	Integration	CDS Hooks	X	X	
53	Enhancement	Medications	Medications revamped	X	X	
54	New Feature	Navigation	Replace VTR with site map	X	X	
55	Enhancement	Notes	Medication changes in Note	X	X	
56	Enhancement	Notes	Note Default Navigation after signing	X	X	
57	Enhancement	Notes	Audit options for notes	X	X	
58	New Feature	Notes	New note structured content - Logic modules	X	X	
59	New Feature	Notes	New Structure content - Questionnaires that auto score	X	X	
60	New Feature	Notes	New Structure content - e/M coder note forms	X	X	
61	Enhancement	Orders	Order results signatures on requisitions		X	
62	Enhancement	Patient	Patient Deceased Indicator		X	
63	Enhancement	Patient	Patient Data Sharing	X	X	
64	Enhancement	Patient	Patient Banner redesign	X	X	
65	Bug Fix	Problems	Assess problem managed by issue fixed	X	X	
66	Enhancement	Problems	Problem History Coverage expanded	X	X	
67	Enhancement	Schedule	Schedule Consolidation		X	
68	New Feature	Single Sign on	APM Sign on from TW		X	
69	New Feature	Single Sign on	Time/Log switching without logging out		X	
70	New Feature	Single Sign on	Single sign on with Okta not Citrix		X	
71	Enhancement	Problems	Next Ready for Billing icon updated		X	
72	Workflow Mod	ACI	ACI Redesign		X	

Interfaces, Reports, and Customizations

Managed Services can own and execute client-specific upgrade responsibilities to

- Review /retrofit and validate the customizations present in the environments
 - Interface Customization
 - Report customization
 - Customized Data extract query /Stored procedures
- Review and agree on the list of customizations with tagged categories of Altera-owned Customization and Client Owned Customization
- For Altera-owned customization
 - Ensure the customizations are in place and working as expected after the upgrade.
 - Work with Altera implementation to sort any issues any after the upgrade.
- For Client owned Customization
 - Analyze and prepare documents of all present custom interface setup, reports, and stored procedures
 - retrofit customization to align/synchronize to match the new version
 - Package and hand over retrofits to the upgrade team for deployment
 - Makes sure the customization is in place and working as expected after the upgrade
- Perform upgrade-related interface changes with non-inclusive interface engines such as CorePoint, cloverleaf
- Interface Validation and Testing

Files to deploy during Live	PRC\RPT	Type	Altera/ Client Owned	Client Responsibilities
rptRequisition	PRC	Report	Altera	Make sure the file version is same on all webservers, print server , and Message servers
rptRequisitionHeader	PRC	Report	Altera	Make sure the updated files is deployed and DB server
FaxCoverPage	RPT	Report	Altera	Make sure the file version is same on all webservers, print server , and Message servers
Order Requisition	RPT	Report	Altera	Make sure the file version is same on all webservers, print server , and Message servers
FileProblem_CMS	PRC	Interface	Client	It is a client owned Stored Procedure which needs to be present in the Live environment. Make sure it is retrofitted as per new version

Upgrade Testing

Managed Services provides high-quality, cost-effective testing services for an upgrade to ensure preparedness to adopt, manage, and maintain the new features and functionality of the solution update



Process

- Framework for standardized test processes, best practices, and tools.
- Repeatable process and established testing guidelines.
- End-to-end clinical workflow testing, including custom configuration.



Team & Tools

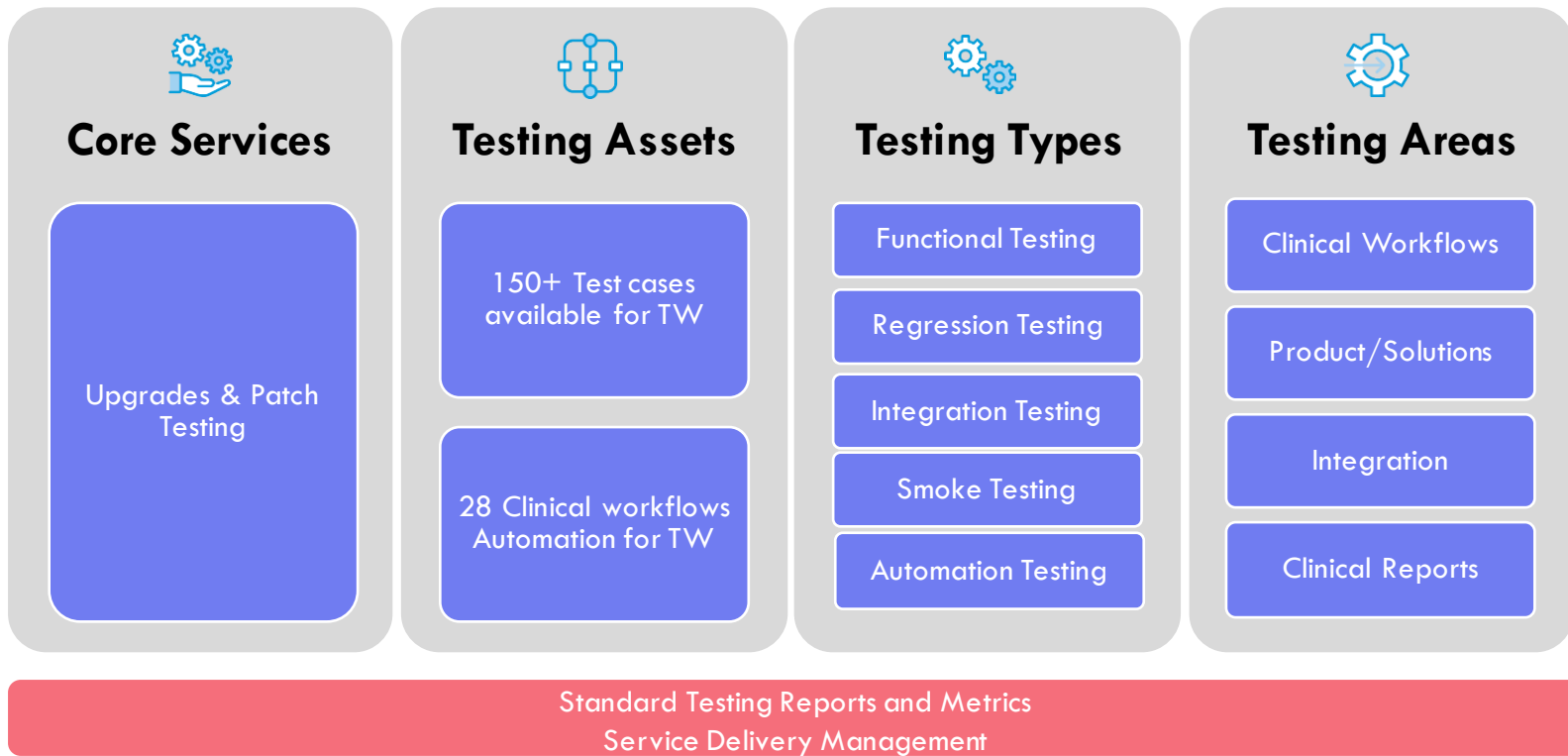
- Test cases backed by clinical knowledge and workflow understanding.
- Build and update standard script templates, automated test scripts, and developed test scripts.
- A centralized test case repository and knowledge articles.
- Requirement matrix for each functionality



Benefits

- **Preparation:** End-to-end workflow discussion, planning, and documentation.
- **Planning:** Risk Based Testing (RBT) for optimal set of test cases.
- **Expertise:** Knowledgeable in avoidance of Go-Live Blocking (GLB) issues based on experience at other client sites.
- **Execution:** Use of test and defect management tools.

TW Testing Services and Assets



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



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.



Provides 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 projects.



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

Q&A



ASCENDING TO NEW HEIGHTS IN HEALTHCARE

Appendix
