



Upgrade Assistance Services for TouchWorks EHR

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Agenda



- 01 Industry Perspectives on Managed IT Services
- 02 Altera Managed Services Overview
- 03 TouchWorks® EHR Upgrade Assistance Services
- 04 Where to Find Out More
- 05 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, 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

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)



Applications

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



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 ongoing client operations related to HIT solutions

BROAD SCALE, CUSTOMIZABLE SERVICES



IT Outsourcing (ITO) – Full Shop



ITO – Applications

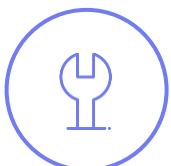


Staff Augmentation – Specific Roles

FOCUSED, PACKAGED SERVICES



IT Service Desk



Upgrade Assistance Service



Testing Center of Excellence



Network/
Infrastructure
Services



Integration Services



Global Managed
Services Bank of
Hours



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

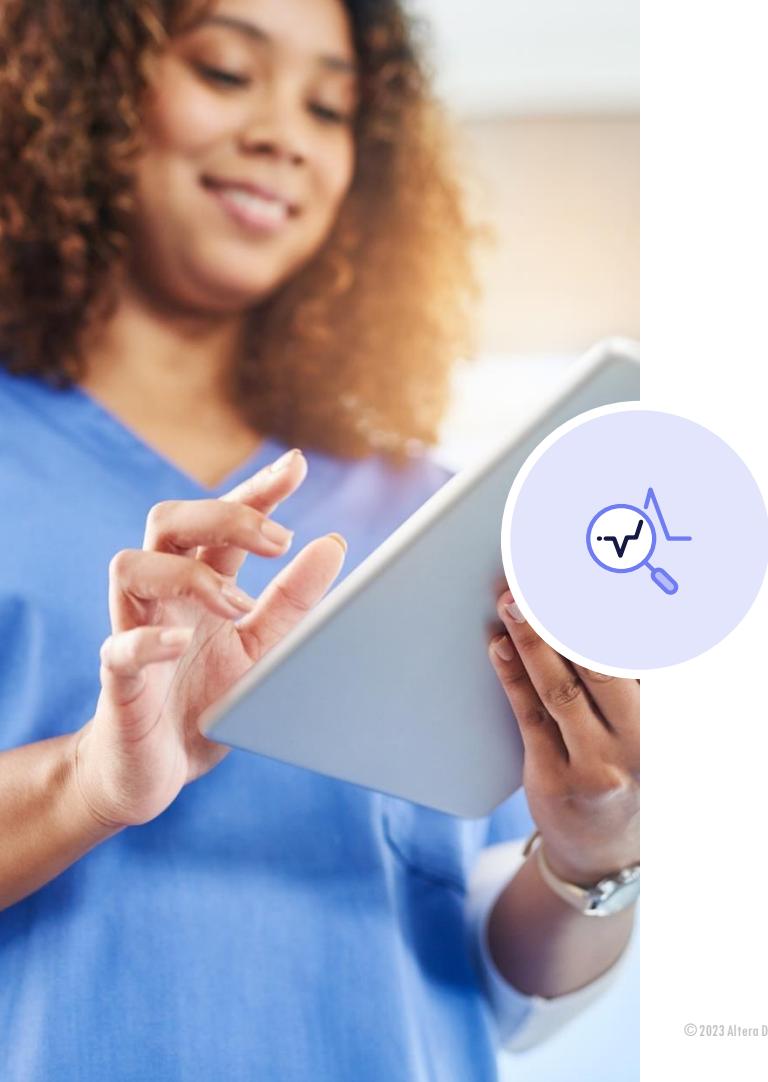
Testing – End-to-End Clinical Workflow testing; Enhancements Testing; TW - Surround Solution
Regulatory

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

Filter by Version	Category	Build Location	Build Activity	Shared Name	Definition	Filter by edition	Requires Administered Configuration	Requires Configuration Changes	End User Configuration Required	Test Env Status	Test Env Type	Test Env Description	Shared Env Status	Shared Env Type	Shared Env Description	Notes
20.3	Admin	Preferences > System > Messaging (Slack Script[SLK])	Separate HEDIS URL preference for secure messaging		A new preference, AcceptingMessages (Slack Script[SLK]), was added to TIL releases for Altegra Message API for accepting messages from external sources and sending test messages sent to the specified URL. This preference is a generalized Category level.		Yes	No	No							
20.3	Admin	Delta updates	Pharmacy update initiated per update		The existing preference AcceptingMessages (Slack Script, [SLK]), was added to TIL releases for Altegra Message API for accepting messages from external sources and sending test messages sent to the specified URL. This preference is a generalized Category level.		Yes	No	No							
20.3	Admin	Chart Structure > Chart Section	EDIS Imported Document		Previously, when an imported institutional Clinical Exchange Document did not contain the Altegra Universal Template (ET) structure, it was rejected. The new logic has been added to support these documents and they can be imported as 'EDIS Imported Document'.		Yes	Yes	No							

Type	Category	Feature Name	Client Decision	Config Requir.	Test Env Stat.	Prod Env Stat.
17	Enhancement	Admin	Administration changes	x		
40	Enhancement	CCDA	CCDA system changes	x		
14	Enhancement	Charges/Line Items	Sign note before Charge view	x	x	
2	New Feature	Charges/Enc	Sign note before submit encounter/charges	x	x	
21	New Feature	Charges/Enc	Bypass HEDIS task list by appt type, generate charge by appt type	x	x	
3	New Feature	HEDIS	HEDIS Reminders	x	x	
1	New Feature	Medication	CDSS for medication	x	x	
13	Enhancement	Medication	Medication revamped	x	x	
8	New Feature	Navigation	Replace VTB with site map	x	x	
1	Enhancement	Notes	Medication changes in Note	x	x	
20	Enhancement	Notes	Note Default, Navigation after signing	x	x	
14	Enhancement	Notes	Notes	x	x	
9	New Feature	Notes	New note structured content - Logic modules	x	x	
52	New Feature	Notes	New structure content - Questionnaires that auto score	x	x	
51	New Feature	Notes	New structure content - E/M coder note forms	x	x	
27	Enhancement	Orders	Order results signatures on requisitions	x	x	
28	Enhancement	Patient	Patient appointment locator	x	x	
29	Enhancement	Patient	Patient Data sharing	x	x	
11	Enhancement	Patient	Patient Banner redesign	x	x	
24	Bug Fix	Problems	Assess problem managed by issue fixed	x	x	
41	Enhancement	Problems	Problem History Coverage expanded	x	x	
7	Enhancement	Schedule	Schedule Consolidation	x		
4	New Feature	Single Sign on	APN Sign on from TWM	x		
20	New Feature	Single Sign on	Single sign on with CDEs and CDEs Import out	x	x	
21	New Feature	Single Sign on	Single sign on with ODEs not CDEs	x	x	
43	Enhancement	Problems	Not Ready for Billing item updated	x		
38	Workflow Mod	ACI	ACI Redesigned	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



Core Services

Upgrades & Patch Testing



Testing Assets

150+ Test cases available for TW

28 Clinical workflows Automation for TW



Testing Types

Functional Testing

Regression Testing

Integration Testing

Smoke Testing

Automation Testing



Testing Areas

Clinical Workflows

Product/Solutions

Integration

Clinical Reports

Standard Testing Reports and Metrics
Service Delivery Management

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
