



# TouchWorks® EHR Q2 Update Webinar

*Bringing next-level healthcare within reach*

May 21, 2025

## 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 by default



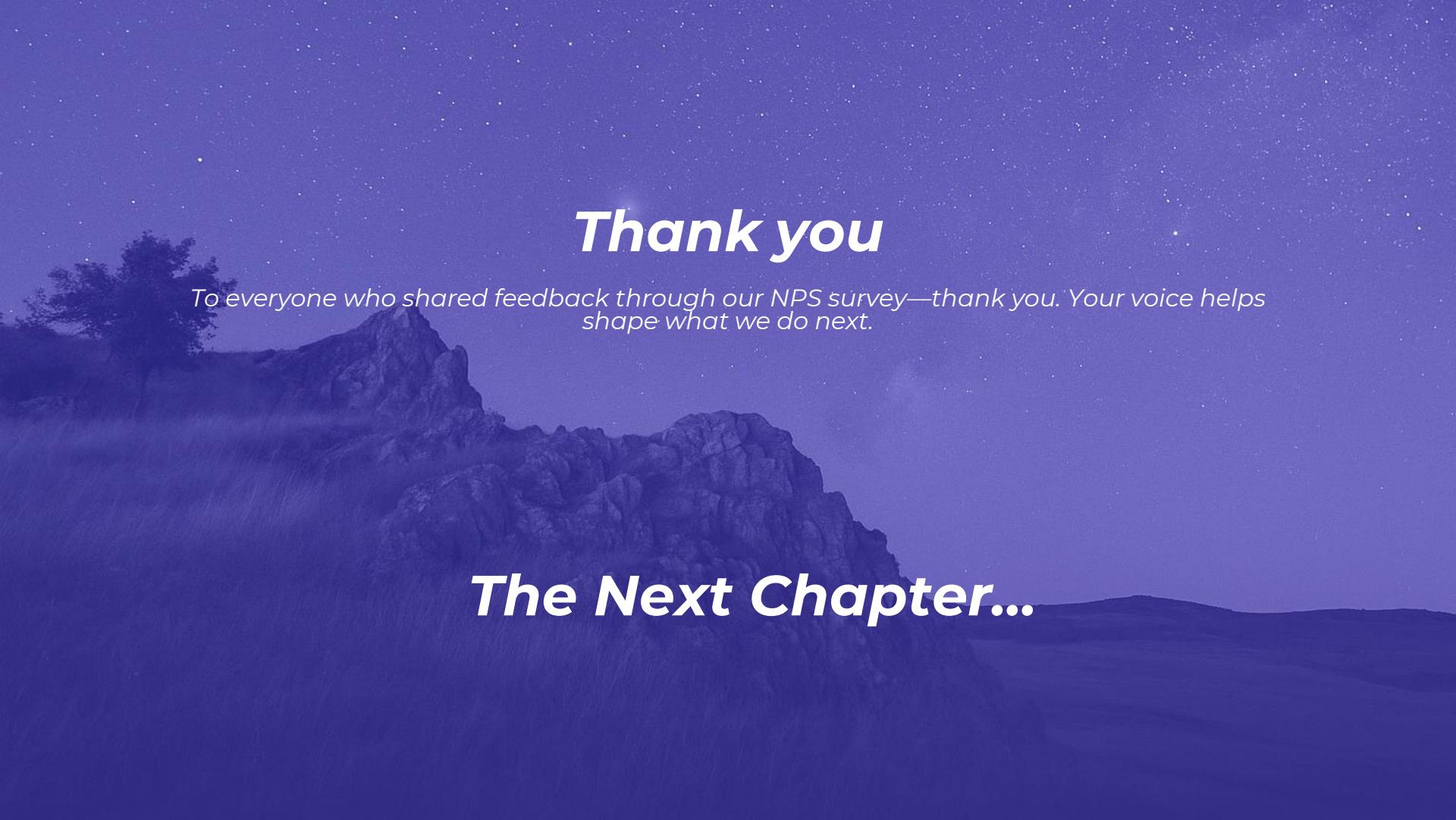
Ask questions via Q&A panel or 'Raise your hand' option to ask questions live



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!

A landscape photograph of a rugged mountain range under a dark, star-filled sky. The mountains are dark and silhouetted against the bright stars. The foreground shows rocky terrain and sparse vegetation.

# Thank you

*To everyone who shared feedback through our NPS survey—thank you. Your voice helps shape what we do next.*

## ***The Next Chapter...***

# Agenda

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May 21, 2025



- 01** Introduction and thank you  
*Beth Thomson, VP Client Success*
- 02** In the know  
*Rob Sloan, Expert Training Consultant*  
*Sean Schulz, VP Operations*  
*Aaron Armstead, Director Solutions Management – Regulatory*
- 03** The TouchWorks Platform  
*Jeanne Armstrong, TouchWorks CMO*
- 04** Next webinar & HCTC  
*Beth Thomson, VP Client Success*
- 05** Q&A

# In The Know

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Schedule, Prepare and Plan for Success!

## CLEAN-UP EFFORT TIMELINE

# Integrated Scan

### Pre-Engagement



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

### Release Project KO

60d

30d

15d

- **Phase 2** Script Run

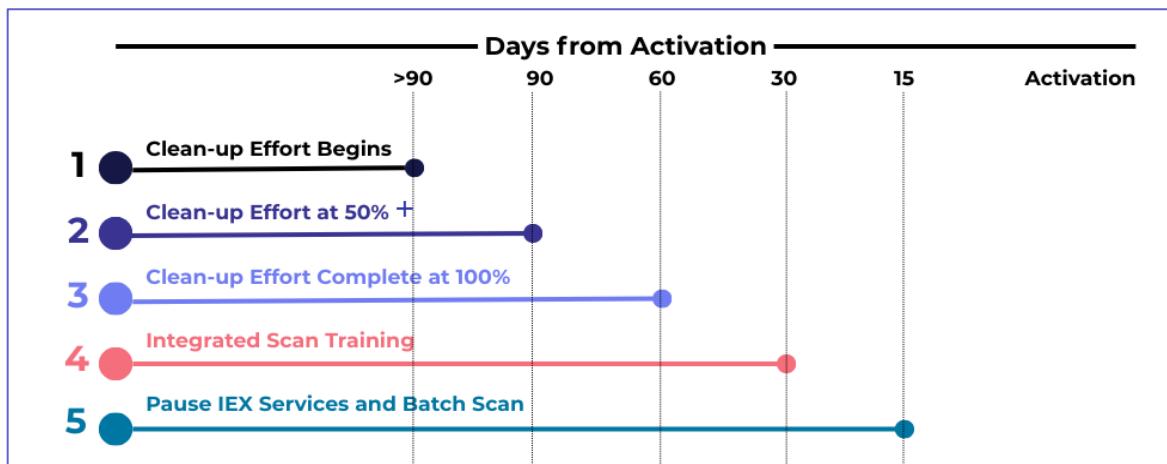
- **Phase 3** Script Run

- *Integrated Scan Activation Readiness*

### Activation

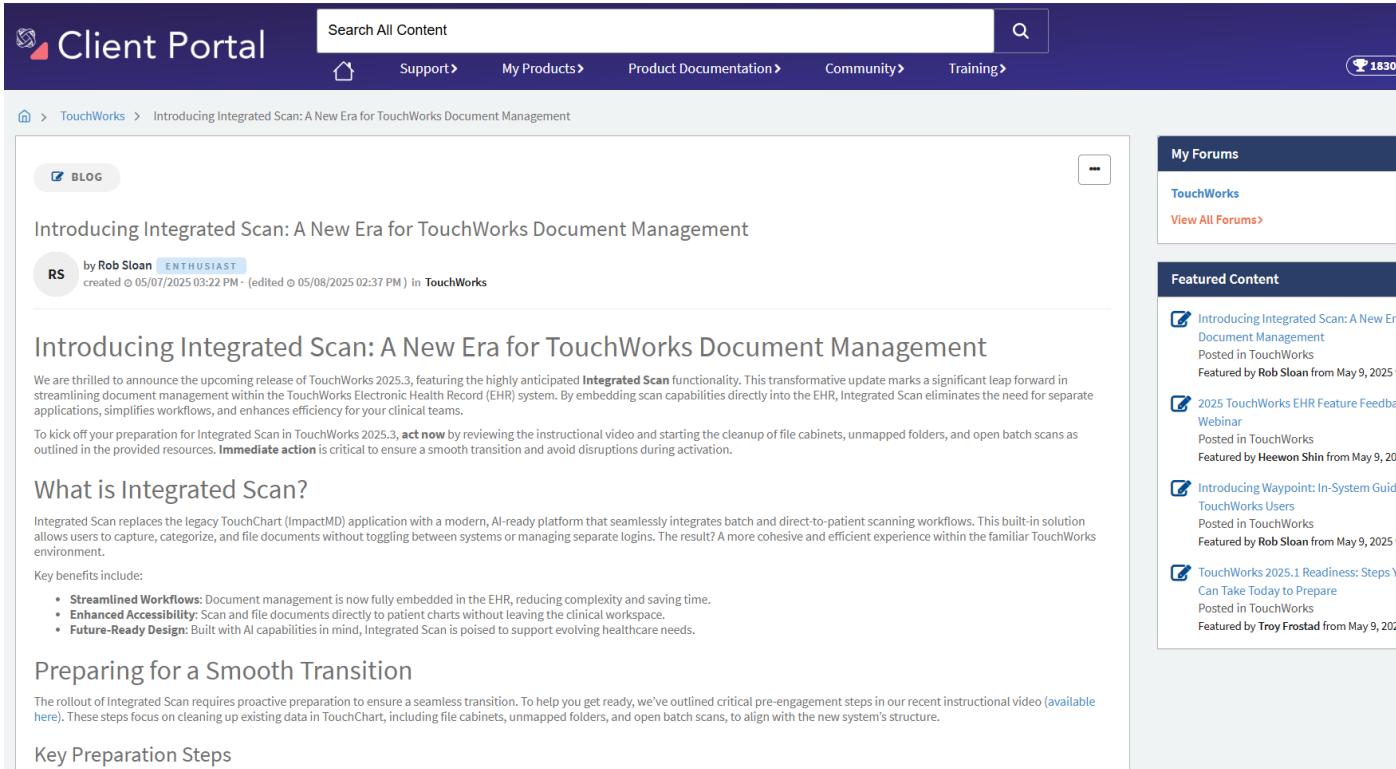
15d

- Transition to Integrated Scan



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

# Integrated Scan Prep



The screenshot shows the Client Portal homepage with a dark blue header. The header includes the 'Client Portal' logo, a search bar with 'Search All Content' and a magnifying glass icon, and a user icon with '1830' notifications. The main content area shows a blog post titled 'Introducing Integrated Scan: A New Era for TouchWorks Document Management' by Rob Sloan. The post is dated 05/07/2025 03:22 PM and has 1830 views. The post content discusses the upcoming release of TouchWorks 2025.3, featuring Integrated Scan functionality. It highlights the transformational update in streamlining document management within the EHR system. The post also provides instructions for preparation, mentioning 'act now' and 'immediate action'. Below the post, a section titled 'What is Integrated Scan?' explains that it replaces the legacy TouchChart application with a modern, AI-ready platform for batch and direct-to-patient scanning workflows. It lists key benefits: streamlined workflows, enhanced accessibility, and future-ready design. A section titled 'Preparing for a Smooth Transition' outlines critical pre-engagement steps. On the right side, there are 'My Forums' and 'Featured Content' sections, both of which list the 'Introducing Integrated Scan' post as a featured item.

Client Portal

Search All Content

Home Support My Products Product Documentation Community Training

1830

Blog

Introducing Integrated Scan: A New Era for TouchWorks Document Management

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 [View All Forums>](#)

Featured Content

- Introducing Integrated Scan: A New Era for Document Management  
Posted in TouchWorks  
Featured by Rob Sloan from May 9, 2025
- 2025 TouchWorks EHR Feature Feedback Webinar  
Posted in TouchWorks  
Featured by Heewon Shin from May 9, 2025
- Introducing Waypoint: In-System Guidance  
TouchWorks User  
Posted in TouchWorks  
Featured by Rob Sloan from May 9, 2025
- TouchWorks 2025.1 Readiness: Steps You Can Take Today to Prepare  
Posted in TouchWorks  
Featured by Troy Frostad from May 9, 2025

# Veradigm Separation Continues

Starting June 2025



## FHIRr4 Reinstall

- FHIR Downtime
- Like4Like Test/Prod
- All During Business Hours
- FHIRr2 Deprecated
- New LMP URL
- No 3<sup>rd</sup> Party Changes
- Proactive Support Case



## Unity Reinstall

- Unity Downtime
- Like4Like Test/Prod
- Test During Business Hours
- Production After Hours
- No 3<sup>rd</sup> Party Changes
- Proactive Support Case



## ACDM Update

- TW IIS Restarts
- Like4Like Test/Prod
- Test During Business Hours
- Production After Hours
- MedAllies Endpoint Update
- Proactive Support Case

# 2026 Reporting Year Reminder

2025.3  
7/8/25

- Contains most of the functionality required for certification.
- Enables clients to take their upgrade as scheduled, this year.
- Serves as the foundation for certification.
- Requires S.F.U. to be certified.

2025.4  
Oct 2025

- Same regulatory as 2025.3.
- Contains additional non-regulatory features and fixes.
- Requires S.F.U. to be certified.

Supplemental  
FHIR Update  
Q4 2025

- Delivered later in 2025 to complete the delivery of our certified EHR release.
- Updates to both FHIR and TWEHR.
- Available for clients running 2025.3 or higher.
- Does not require a full upgrade project.

2026.1  
Q1 2026

- TBD if natively contains the Supplemental FHIR Update or requires it.
- Most clients will be on 2025.3 or 2025.4 for regulatory needs.

# 2025 Reporting Year Reminders

## 2025 Compliance Readiness

### Upgrade to Version 2024.3+ and FHIR 24.5+

2024.3 and FHIR 24.5 versions include HTI-1 Final Rule criteria:

**Decision Support Intervention (DSI)**  
**FHIR Publication Required Updates**



**Promoting  
Interoperability (PI)**

Upgrade by  
**July 3, 2025**



**Reporting ONLY  
eCQMs**

Upgrade by  
**December 31, 2025**



**ACO / Others**

**Check with your  
Admins**

## Reminders



### !! FHIR R4 Oversight Program !!

- Monitor FHIR R4 endpoints!
- Review your License Management Portal org data!
- Need help? Support to the rescue!



**Up Next ...  
Regulatory Rally Webinar**

**June 12 @12pm EST**

[\*\*Register Now\*\*](#)

# The TouchWorks Platform

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Empowering You to Thrive

# 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



Note+ - The Purpose Behind Our Work

# Improving Clinician Experience

1

## Effortless accuracy

Ensure precise and comprehensive clinical notes, reducing errors.

2

## Time savings & increased revenue

Spend more time with patients, less on administrative tasks, enjoy easier charge capture.

3

## No more pajama-time

Complete documentation during work hours, eliminating after-hours work.

# Introducing

## Harris CareTracker – PM System



## Intelichart Portal





- Trusted solution for over 20 years
- 10,000 providers, 1300+ clinics, 30 Channel Partners
- 46 States & 90+ Specialties
- Outstanding customer service satisfaction rating (9.3 ★★)

<https://harriscaretracker.com/>

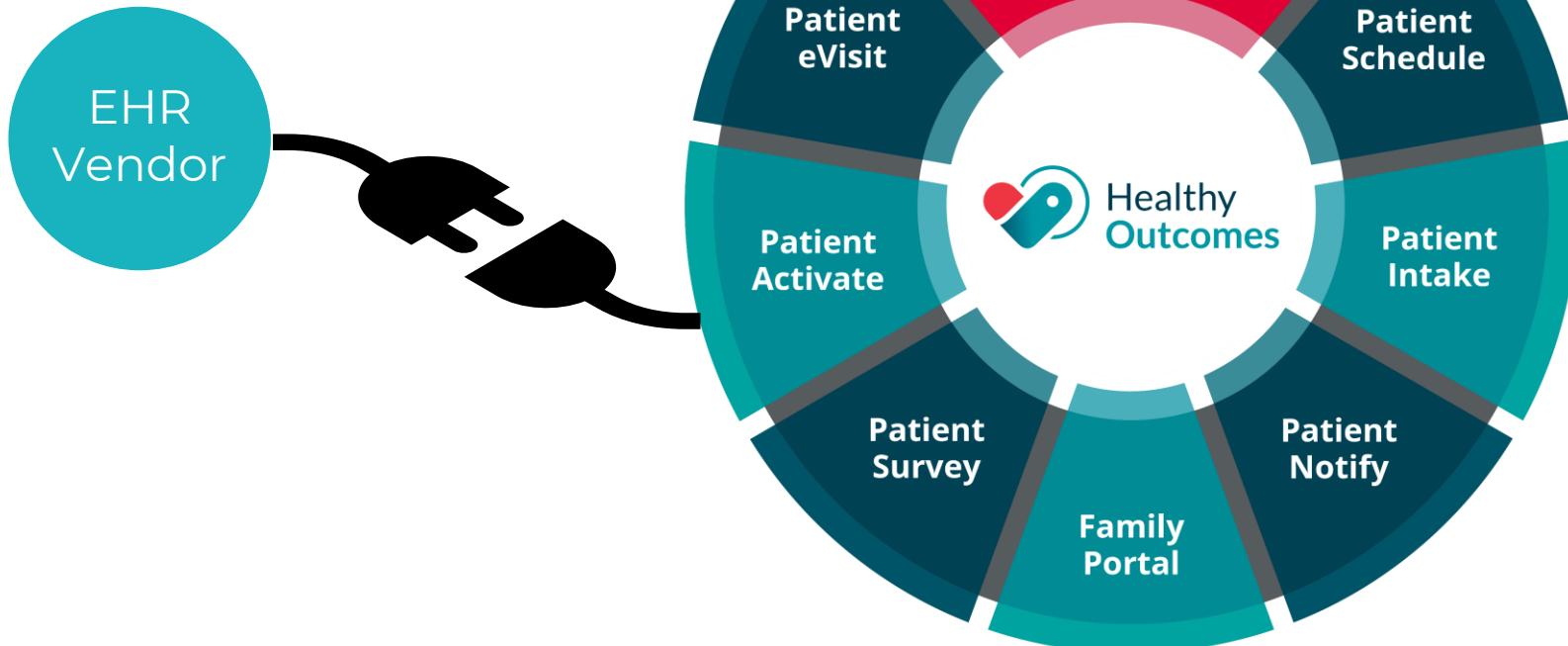
# What is the New PM Technology?

Harris owned secure web-based Practice Management solution  
Integrated Claim Scrubbing, payment processing & claims generation through Harris Secure Connect Clearinghouse  
Efficient, role-based dashboards designed by billers  
Paperless workflows  
InteliChart integration  
Integrated payment processing  
Robust Reporting

The screenshot displays the Harris CareTracker Practice Management software. The interface is organized into several main sections:

- Top Bar:** Includes buttons for Book, Month, Calendar, Family, Recall, History, Advanced, and TeleVox. It also shows the date as Monday, April 14, 2025, and provides search and filter options for All Resources and All Locations.
- Calendar:** Shows a grid of appointments for four providers: John Sunrise (BHH Mon), Matthew Johnson (BHH Mon), Michelle Lee (BHH Mon), and Stephanie Brown (BHH Mon). The calendar highlights specific appointments with color-coded boxes and includes notes such as "Sole, Peter New Patient Foot Exam [30] 109883908 - Bright Horizon Health" and "Fracture, Patrick New Patient [C] Foot Exam [30] 109879126 - Bright Horizon Health".
- Left Sidebar:** A navigation menu with links to Home, Patient, Scheduling, Financial, Doc Management, Reports, Connections, Administration, ToDos, Mail, Faxes, and Direct Mail. The Patient and Scheduling sections are currently active.
- Bottom Left:** The Harris CareTracker logo.
- Bottom Right:** A detailed view of the Billing section, showing Open Batches, Open Patient Procedures, Open Insurance Procedures, Denials, Credit Balances, Verify Payments, Statements, and Collection data. It also includes sections for Claims (Claims Worklist, Open Claims, Unbilled, Crossover, Inactive), and Open Paper Claim Batches, Open Electronic Claim Batches, Batch Level Rejections, and Claim Attachments Required.

# Simplify Solution Integration





First Look

**InteliChart Patient Portal 2024**  
Providing a Best-of-Breed Patient Portal Focused on Engagement

Emerging Insights Report | March 2024



- KLAS Patient Portal Score: 86.7
- KLAS average for Patient Portals: 76.8
- FollowMyHealth Portal score: 57.1
- MyChart from Epic is 90.2

2026

- **Medication Management Enhancements:** *Streamlined prescribing workflows with delivery of upgraded ePA support and alignment to latest NCPCP standards, improving authorization efficiency*
- **Patient Engagement Platform:** Enhanced patient experience with delivery of integrated portal, self-scheduling and intake workflows through Intelichart platform.
- **Harris CareTracker PM Integration** *Improved operational efficiency with integrated EHR + PM experience and enhanced revenue cycle alignment across clinical & financial workflows*
- **Questionnaires & Calculators-** *Improved clinical workflow with delivery of dynamic forms for screenings, calculators, and outcomes—fully integrated with Note+ and Orders/Results*
- **Virtual Medical Assistant.** *Revolutionize EHR interactions by providing detailed, conversational access to comprehensive patient data with VMA. Get assistance with chart navigation and decision support, with comprehensive search functionality.*
- **Reporting and Analytics Tools** *Improved data-driven decision-making with creation of a new suite of tools for regulatory, clinical, and payer reporting—including gaps in care—integrated with TouchWorks, Altera, and third-party platforms*

# Next Webinars



## Feature Feedback & Mastermind Webinar

Jun. 11, 2025

[Register Now](#)



## TouchWorks Regulatory Rally Webinar

Jun. 12, 2025

[Register Now](#)



## TouchWorks Q3 Update Webinar

Aug. 20, 2025

[Register Now](#)



Save the Date!

# HCTC 2025



*Gaylord Pacific | San Diego, CA*  
*Dec. 2 - 4, 2025*





# QUESTIONS?



Bringing next-level healthcare within reach

[alterahealth.com](http://alterahealth.com)