



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!

The background of the slide is a monochromatic blue-toned image of a night landscape. It features a dark, starry sky, a rocky hillside in the foreground, and a single tree on the left. The overall mood is serene and contemplative.

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

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

Schedule, Prepare and Plan for Success!

CLEAN-UP EFFORT TIMELINE

Integrated Scan

Pre-Engagement

Release Project KO

Activation



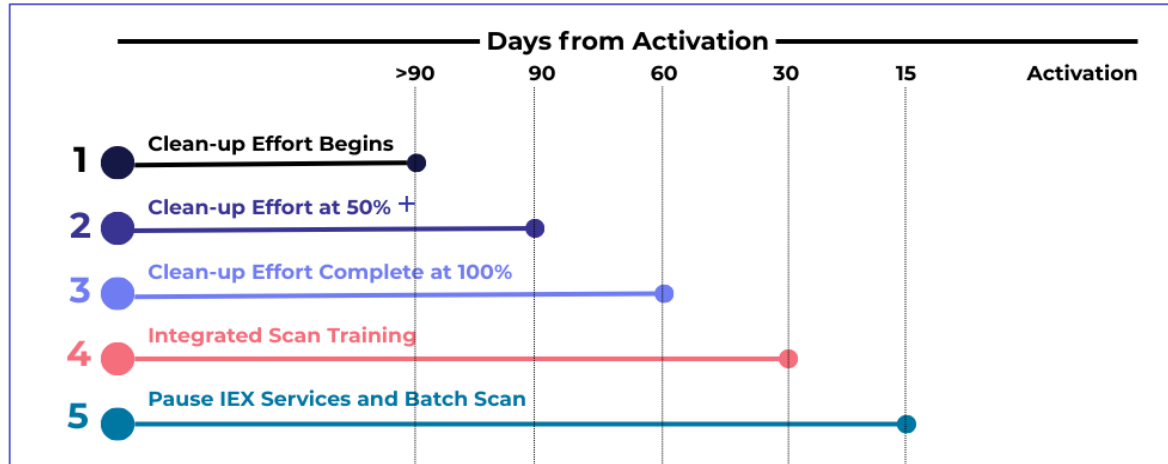
- **Phase 1** Script Run
- Start clean-up

- **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.


Integrated Scan Prep


 Client Portal




 Support > My Products > Product Documentation > Community > Training >




 > TouchWorks > Introducing Integrated Scan: A New Era for TouchWorks Document Management

 BLOG



Introducing Integrated Scan: A New Era for TouchWorks Document Management

 **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 TouchWorks Document Management](#)
Posted in TouchWorks
Featured by **Rob Sloan** from May 9, 2025 to

 [2025 TouchWorks EHR Feature Feedback Webinar](#)
Posted in TouchWorks
Featured by **Heewon Shin** from May 9, 2025 to

 [Introducing Waypoint: In-System Guided TouchWorks Users](#)
Posted in TouchWorks
Featured by **Rob Sloan** from May 9, 2025 to

 [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 3rd Party Changes
- Proactive Support Case



Unity Reinstall

- Unity Downtime
- Like4Like Test/Prod
- Test During Business Hours
- Production After Hours
- No 3rd 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
eQMs**

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

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

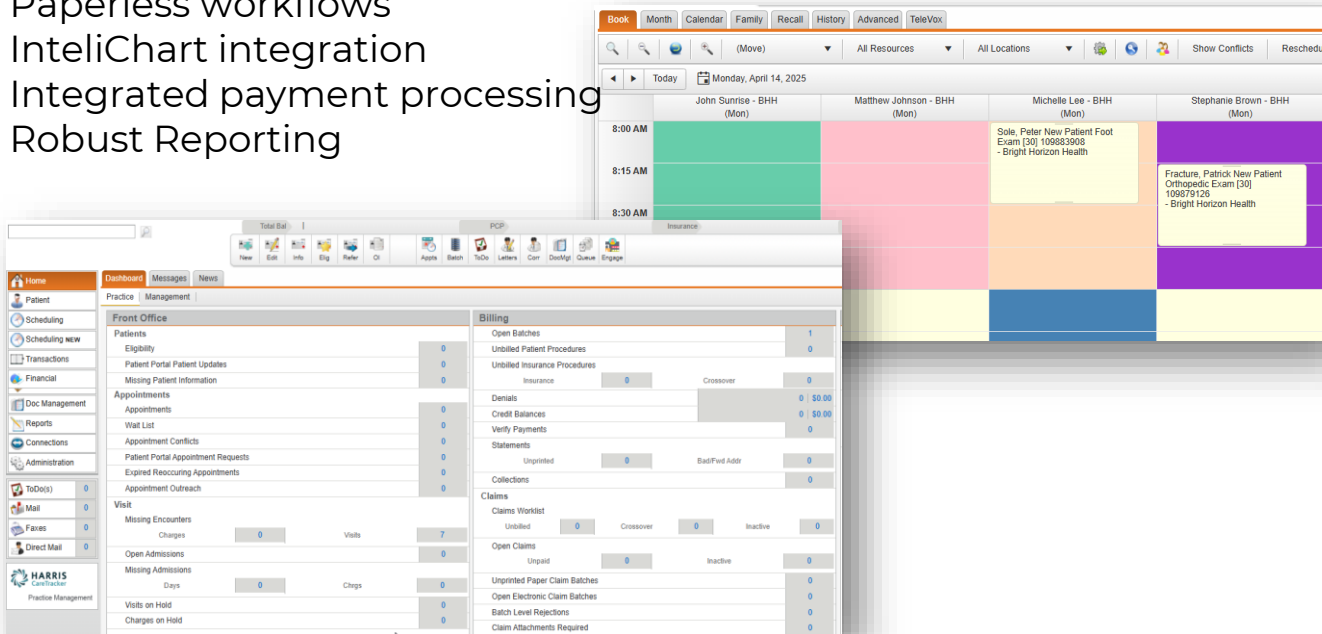


Intelichart Portal



What is the New PM Technology?

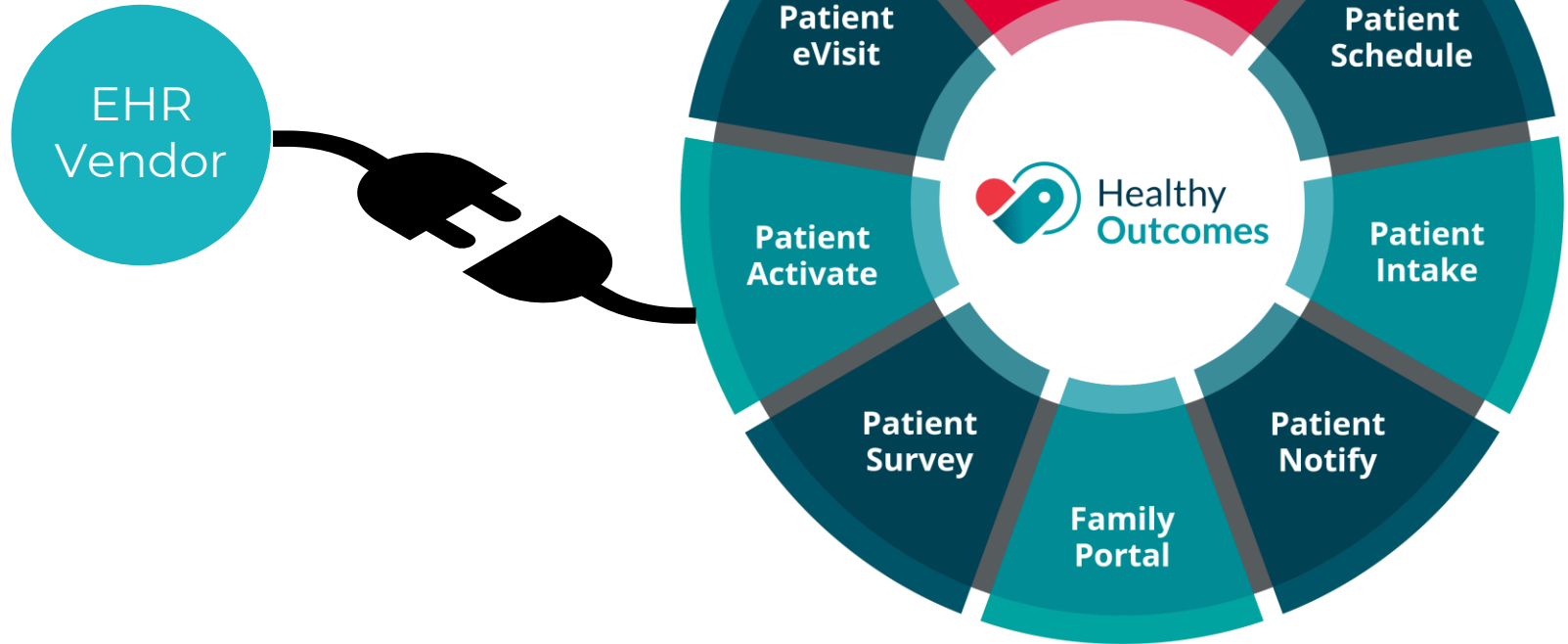
Harris owned secure web-based Practice Management solution
 Integrated Claim Scrubbing, payment processing & claims generation through Harris Secure Connect Clearinghouse
 Efficient, role-based dashboards designed by billers
 Paperless workflows
 IntelliChart integration
 Integrated payment processing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



- 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/>

Simplify Solution Integration





- 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 NCPDP 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](#)



HCTC
2025

Save the Date!

HCTC 2025

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



QUESTIONS?



Bringing next-level healthcare within reach

alterahealth.com