



TouchWorks® EHR Q4 Update Webinar

Bringing next-level healthcare within reach

November 19, 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

November 19, 2025

01

Welcome & Agenda

02

Iterative Improvement

Sean Schulz, VP Operations

Raj Mehra, VP R&D

03

Reminders

04

New Important Info

05

Q&A

Jeanne Armstrong, CMIO

ENDURING ORGANIZATION

OPERATIONAL
EXCELLENCE

GROWTH:
ACQUIRED
& ORGANIC

PEOPLE:
ENVIRONMENT
& CULTURE

bad news
does not get
better
with
time.



SOLUTIONS NOT PROBLEMS
COMMON SENSE

EMPOWERMENT
AT THE
POINT
OF
CONTACT

RESPECT OF THE
INDIVIDUAL

- ACCOUNTABILITY
- RESPONSIBILITY
- OWNERSHIP

Understand
REALITY
MAKE DIFFICULT
Decisions

DREAM
REALIZATION
Understanding
LEARNING

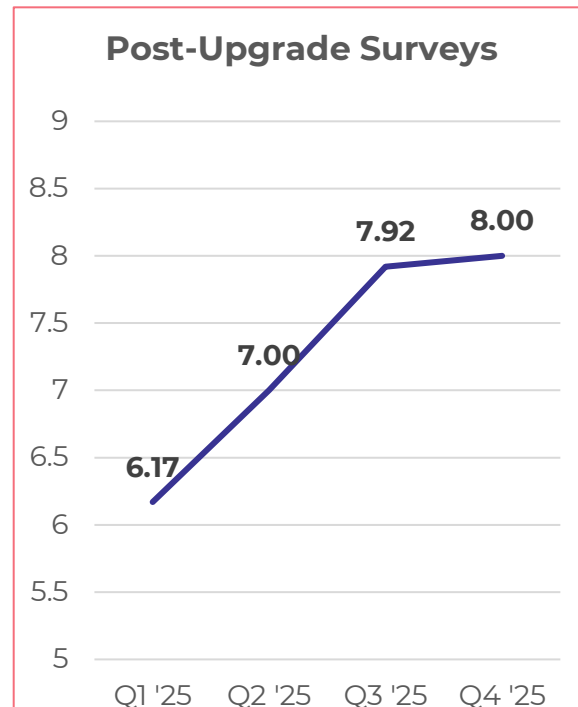
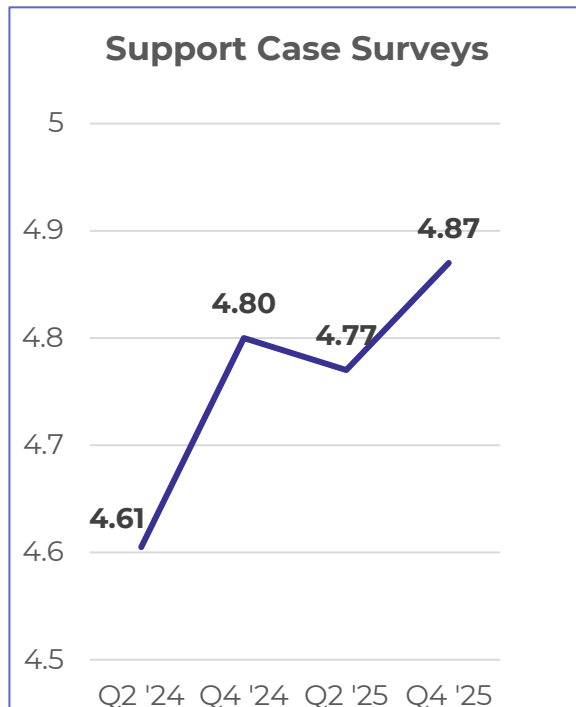
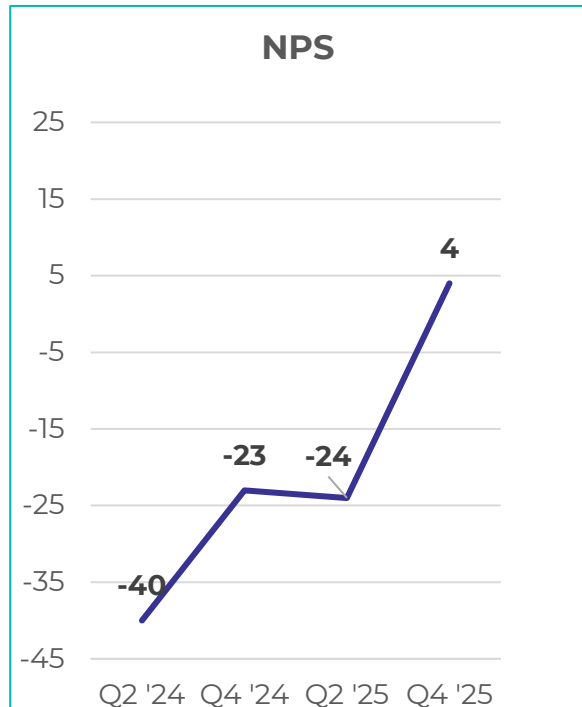
DISCIPLINE
UNWAVERING &
RELENTLESS
FOCUS



The aggregation of marginal gains.

- David Brailsford, Performance Director, British Cycling

OE: Iterative Improvement



Thank you for your feedback!

OE: Iterative Improvement



Solution Strengths

- Improving Configurability and Usability
- Positive Trajectory and Stability Post-Acquisition
- Promising AI and Future Innovation Roadmap



Solution Opportunities for Improvement

- Slow Delivery on Promised Innovation
- Limited Integration & Fragmented Ecosystem



Healthcare IT Insights

Thank you for your feedback!

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

MEET A NEW TEAM MEMBER

Raj Mehra



Vice President, Research & Development TouchWorks EHR

Raj Mehra, our new VP of Research and Development at Altera, is a seasoned healthcare technology leader with more than 25 years of experience building and scaling global engineering organizations. A Computer Technology graduate with advanced leadership education from Stanford and MIT, he is a holder of 14 patent and has led major EMR modernization efforts, cloud transformation programs, and AI centered innovation across multiple healthcare platforms.

Raj is a long-time cricket player in Kansas City's professional league, his competitive spirit on the field is matched by his commitment to building a high performing, accountable, and continuously improving R&D organization.

Maximizing R&D Throughput

Enduring R&D Organization



Execution

One Team, One Plan, One Goal



Velocity

Focused for Delivery and Throughput



Value

Scope and Client Connection

EVV: Execution | Velocity | Value – Driving Higher Throughput

- **Unified** common components under the One Model
- **90-Day AI** Plan embedded across the SDLC
- **Operational Excellence** through **Clarity, Alignment, and Focus** (CAF).

- **Centralized QA.**
- Platform team: DevOps, DBA, Security
- **Product** Strategy & Execution

- **Independent Ambulatory Solutions**
- **Dedicated leadership** for R&D **focus areas.**
- **Connecting R&D to Clients:** site visits & TAC

Building a faster, seamless, and AI-driven R&D

Technical Advisory Committee

Goals:

- Share insights on **technical designs**, infrastructure patterns, and database strategies.
- Provide early feedback on **feature configurations, environmental prerequisites**, and deployment readiness.
- Co-develop **best practices** that make TouchWorks easier, faster, and more predictable to maintain.
- Strengthen collaboration between TouchWorks R&D and client IT teams.

We are seeking:

- Azure Cloud Expertise
- SQL DBAs
- Data Integration Specialists
- TouchWorks Sys Admins

Monthly meetups. ETA next month!

Sign up: jeanne.armstrong@alterahealth.com



Key Updates You Need to Know

Schedule, Prepare and Plan for Success!

Product Releases



TouchWorks® EHR

- **Currently Available:** 2025.4
- **Next Release:**
 - Version 2026.1 (Jan 21, 2026)



Altera Prenatal™

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



TouchWorks® EHR Mobile

- **Currently Available:** 25.4
- **Next Release:**
 - Version 26.1 (TBD)

2026 Release Dates

2026.1
1/21/26

2026.2
4/29/26

2026.3
7/22/26

2026.4
10/28/26

TouchWorks Operations Update

Support



TouchWorks EHR Client Support Handbook

Professional Services

Free On-Site Health Check
**Free Note+ with Ambient Listening
Installation Services**
with all in-person
Note+ with Ambient Listening Demos

Upgrade Efficiency Improvement
One Release Delta = 4wk Project
Two Release Delta = 6wk Project
Three+ Release Delta = 8wk Project

Reminder: FHIR Supplemental Update 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

New 2026 “Regulatory” Must Haves

2025.3+

2026 Reporting
*Supplemental FHIR
Update Required**

2026.1

2026 Reporting
Included

2027 NCPDP (eRX)
n/a

2027 Reporting
n/a

Projects
Jan to May

2026.2

2026 Reporting
Included

2027 NCPDP (eRX)
TBD Included

2027 Reporting
TBD Final Rule

Projects
May to July

2026.3

2026 Reporting
Included

2027 NCPDP (eRX)
12/31/26 Deadline

2027 Reporting
TBD Final Rule

Projects
July to Nov

Reminder: Integrated Scan Prep

The screenshot displays the TouchWorks Client Portal interface. At the top, a dark blue navigation bar contains the 'Client Portal' logo, a search bar labeled 'Search All Content', and several menu items: 'Support', 'My Products', 'Product Documentation', 'Community', and 'Training'. A user profile icon with the number '1830' is located on the right side of the navigation bar. Below the navigation bar, a breadcrumb trail reads 'Home > TouchWorks > Introducing Integrated Scan: A New Era for TouchWorks Document Management'. The main content area features a blog post titled 'Introducing Integrated Scan: A New Era for TouchWorks Document Management' by Rob Sloan, an 'ENTHUSIAST'. The post includes a sub-header 'What is Integrated Scan?' and a section 'Preparing for a Smooth Transition'. The right sidebar contains a 'My Forums' section with a link to 'TouchWorks' and a 'View All Forums' link, and a 'Featured Content' section listing several articles, including the one being viewed.

Client Portal Search All Content

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

1830

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

BLOG

Introducing Integrated Scan: A New Era for TouchWorks Document Management

by Rob Sloan **ENTHUSIAST**
created on 05/07/2025 03:22 PM • (edited on 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 to

Contact us if you need people or solution help!

Veradigm Separation Continues



FHIRr4 Reinstall

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

KB1562367

68%

Unity/Ubiquity Reinstall

- Unity/Ubiquity Downtime
- Like4Like Test/Prod
- No 3rd Party Changes
- Proactive Support Cases
- Completion ETA: EOY

KB1562369

1%

ACDM Update (Direct Messaging)

- Cutover Script Testing Continues
- MedAllies endpoint update ongoing
- Like4Like, Support case will be opened.
- Previously Delayed
- **Starting Now**
- Completion ETA: 1/16

KB1561791



Clinical Data Warehouse

- Over-the-Wire
- Using Your Existing Backups
- Self-Hosted Only
- Support case will be opened.
- **Starts December**

KB Coming Soon

Clinical Data Warehouse Migration

Backup | Upload | Notify

Proactive Support case with your wave timing and secure transfer details will be opened over the next weeks.

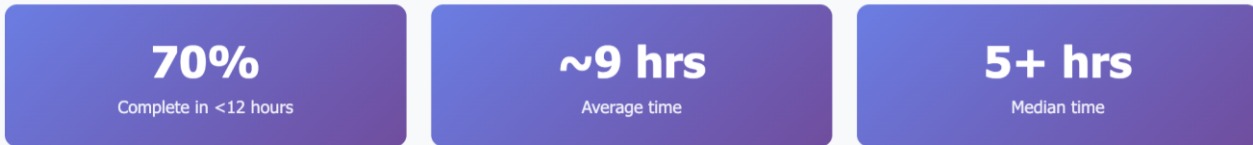
Your Simple Steps

- 1 Run a full, recent backup
- 2 Execute our PowerShell script
- 3 Notify us when complete

Migration Timeline



What to Expect



Fully Supported • Real-Time Monitoring • Secure Transfer

Our team monitors every upload end-to-end. Wave assignments and instructions coming soon.



Next Webinars



Feature Feedback & Mastermind Webinar

Dec 10, 2025

[Register Now](#)



TouchWorks Regulatory Rally Webinar

December. 11, 2025

[Register Now](#)



TouchWorks Q1 Update Webinar

Feb. 18, 2026

[Register Soon](#)