





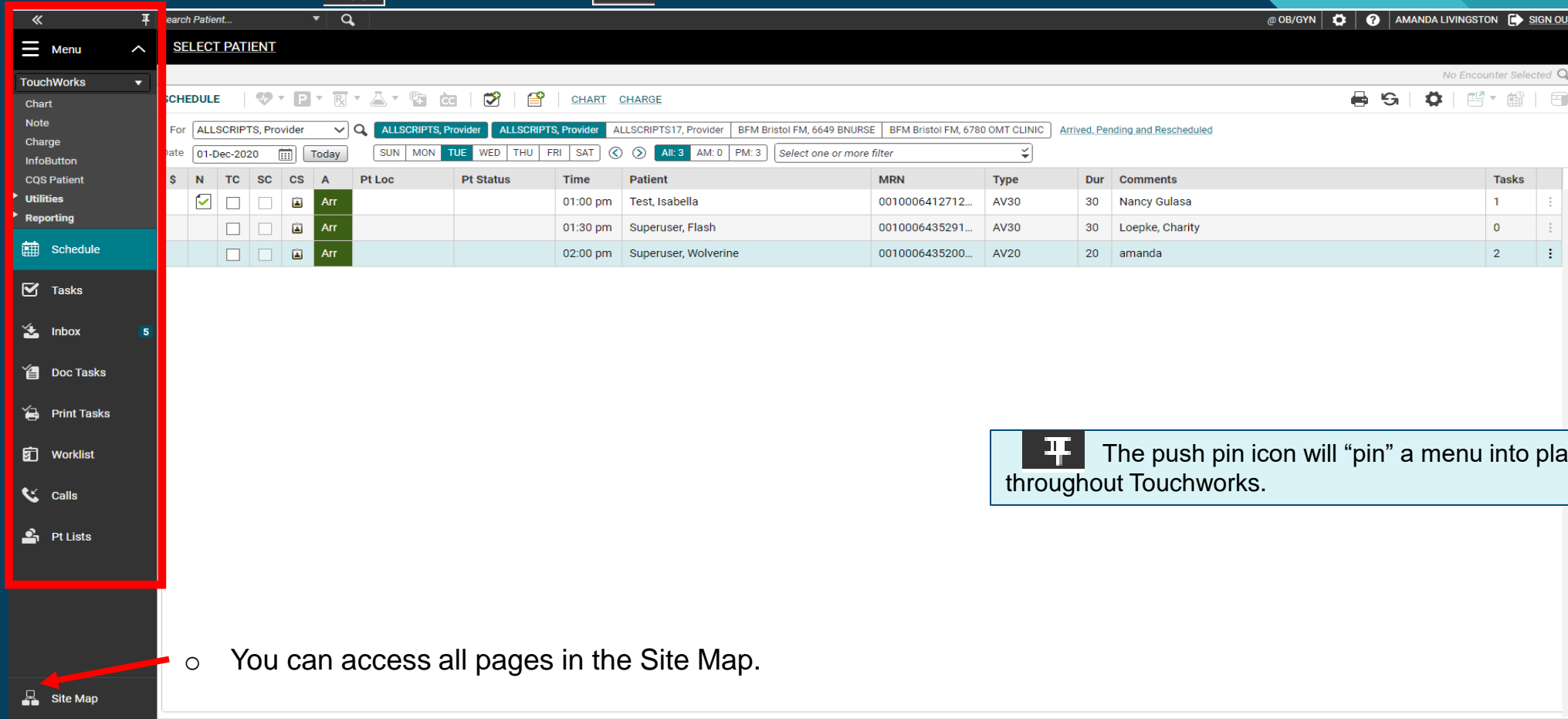
TouchWorks EHR Upgrade Version 20


Basic Changes

Go-Live Date 05/24/2021

Action Bar

- The action bar is a menu-based navigational tool you use to access workspaces in Allscripts TouchWorks® EHR that are available to you. It is located on the left.
- You can minimize  or maximize .



The screenshot displays the Allscripts TouchWorks EHR interface. On the left, a dark navigation menu (Action Bar) is visible, containing various icons and labels for different workspaces. A red rectangular box highlights this menu. At the top of the menu, there is a 'Menu' header with a push pin icon to its left. Below it, several menu items are listed, including 'TouchWorks', 'Chart', 'Note', 'Charge', 'InfoButton', 'CQS Patient', 'Utilities', 'Reporting', 'Schedule', 'Tasks', 'Inbox', 'Doc Tasks', 'Print Tasks', 'Worklist', 'Calls', 'Pt Lists', and 'Site Map'. The 'Schedule' item is currently selected and highlighted in teal. The main content area of the interface shows a patient selection screen with a search bar, filters, and a table of scheduled appointments. The table has columns for status, time, patient name, MRN, type, duration, and comments. A text box on the right side of the screenshot explains the push pin icon:  The push pin icon will “pin” a menu into place throughout Touchworks.

- You can access all pages in the Site Map.

Site Map

- The Site Map shows you the pages you have available. We recommend only showing the workspaces you use daily. You can also navigate to your pages from here.

The screenshot shows the EHR Site Map interface. The top navigation bar includes a search field, user information (@ Pediatrics), a settings gear, a help icon (question mark), and a SIGN OUT button. The main content area is divided into five sections:

- MAIN:** Chart, Note, InfoButton, Charge, Schedule, Tasks, Inbox, Doc Tasks, Worklist, Calls, Pt Lists, InfoButton.
- UTILITIES:** Note Locks, Print Queue.
- REPORTING:** Reports, EPCS Reports.
- CUSTOMIZATION:** My Security Account (Desktop...), My Preferences, My Macros, My Favorites, Print Defaults, Task Views - Manage My, Tasks - Customize, Document Tasks - Customize, Schedule - Customize, Charge - Customize, Pt Lists - Customize, Queue - Customize, Calls - Customize, My Security Account, 2nd Factor.
- HELP:** iLearn, ADBR.

A red arrow points to a question mark icon in the top right corner of the main content area. A text box at the bottom right explains that external links like CSMD, EHR website, and Opioid Documents are located in the HELP section, and that iLearn includes short training videos from Allscripts. The HELP links can also be located on the question mark icon.

Hiding and Showing Pages

The screenshot shows a software interface with a 'SITE MAP' header. The main content area is divided into several sections: MAIN, UTILITIES, REPORTING, CUSTOMIZATION, and HELP. The 'MAIN' section contains items like Chart, Note, Charge, Schedule, Tasks, and Inbox. The 'UTILITIES' section contains Note Locks and Print Queue. The 'REPORTING' section contains Reports and EPCS Reports. The 'CUSTOMIZATION' section contains various account and preference items. The 'HELP' section contains iLearn and ADBR. A red arrow points to a 'Show in Menu' option in a dropdown menu for 'PT Lists'.



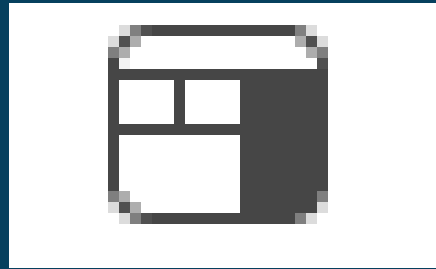
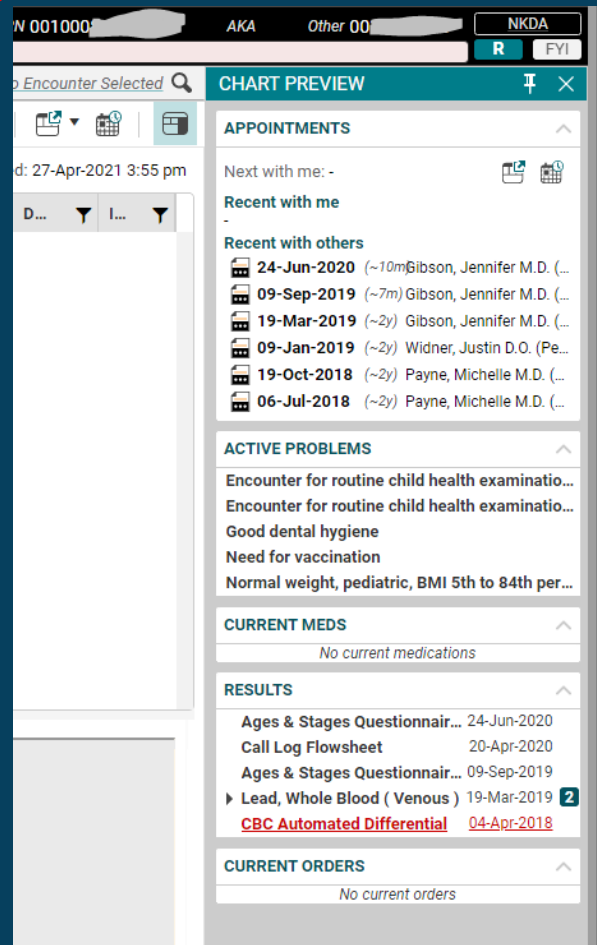
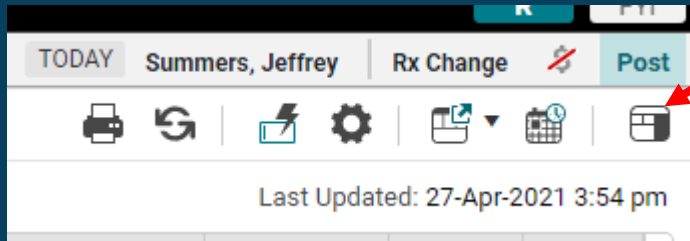
- The hidden from menu  icon is displayed next to hidden pages. These pages aren't shown in the Action Bar.
- To show a page in the Action Bar, Click the options icon  and select **Show in Menu**.
- You can hide pages too.

Chart Preview

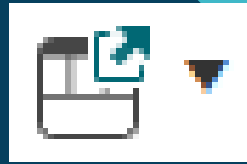
- Chart Preview is a new feature.
- It can be pinned into place.



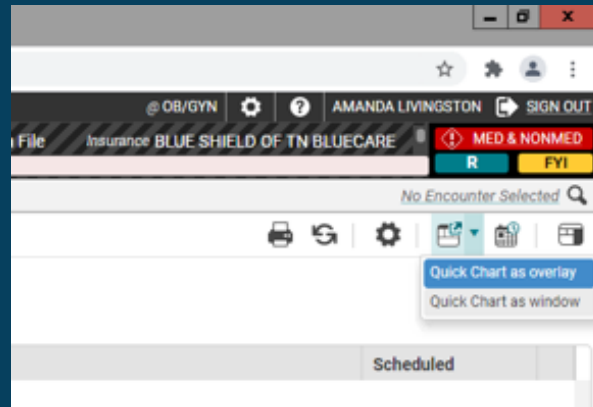
- It shows appointments, active problems, current meds, some results.
- Most useful on tasks, inbox, pt lists, and worklist.



Quick Chart

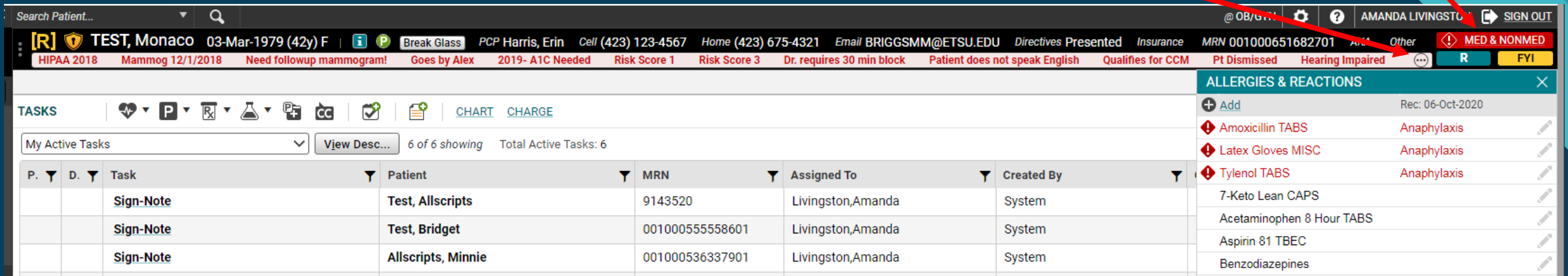


- New ways to use Quick Chart.
- Quick Chart as Overlay can't be moved off of EHR window.
- Quick Chart as Overlay allows editing including assessing problems.
- Quick Chart as Window can be moved around including to a second monitor.
- Quick Chart as Window doesn't allow editing.



Clinical Toolbar/Patient Banner updates

- The floating clinical toolbar has been eliminated.
- Chart alerts are part of the patient banner.
- The 3 dots  indicate more alerts are available.
- The clinical toolbar is available throughout the EHR.
- Insurance has been added to the patient banner.
- Allergy badge flyout shows allergies.



The screenshot displays the EHR interface for a patient named TEST, Monaco. The patient banner at the top includes various alerts and information, such as 'HIPAA 2018', 'Mammog 12/1/2018', and 'Need followup mammogram!'. The clinical toolbar is visible below the banner, featuring icons for heart rate, patient status, and other clinical functions. A flyout menu titled 'ALLERGIES & REACTIONS' is open, showing a list of allergies including Amoxicillin TABS, Latex Gloves MISC, and Tylenol TABS, all with 'Anaphylaxis' reactions. The 'My Active Tasks' section below the toolbar shows a list of tasks assigned to the user, including 'Sign-Note' for various patients.

P.	D.	Task	Patient	MRN	Assigned To	Created By
		Sign-Note	Test, Allscripts	9143520	Livingston,Amanda	System
		Sign-Note	Test, Bridget	001000555558601	Livingston,Amanda	System
		Sign-Note	Allscripts, Minnie	001000536337901	Livingston,Amanda	System

Patient Banner features

- Clicking inside patient banner expands it.

Search Patient...

SUPERUSER, Loislane 01-Jan-2000 (21y) F | **PCP** Cell Home (423) 123-4567 Email Directives Insurance ALL SAVER

Hearing Impaired need new phone number

Demographics		Clinical Information		Preferred Communication	
Home (423) 123-4567	AKA Loislane	Portal/PHR	Info Provided	Clinical Summary	Print
Work -	Address 1010 Superhero Ln	Medication Hx	Consent Declined	Reminders	Home Phone
Cell -	Johnson City, TN 37604	Clinical Trial	False	Chart Update	-
MRN 001000643525901	Email -	Potentially Sensitive Health	Yes	Result Notification	-
SSN# *6789	PCP -				

If a lot of info, scroll available on right.

Patient Banner data can be minimized or maximized, with scroll bar present if needed

Minimized Banner Height

Search... [R] ALLSCRIPTS, Abby B. 20-Aug-1968 (151y) F (Genderqueer) | Break Glass Work (989) 849-0912 Work (989) 849-0912 Other Cur Chart MRN 190211134143193 Directives

No BP in Left Arm Latex Allergy My stuff Test Needs Wheelchair

Maximize Banner Height Abby B. Clear Patient ex Allergy

Maximized Banner Height

Search... [R] ALLSCRIPTS, Abby B. 20-Aug-1968 (151y) F (Genderqueer) | Break Glass Work (989) 849-0912 Other Cur Chart MRN 190211134143193 Directives EMRN 190211134143193 Social *0076 PCP twprovider, TwProvider

No BP in Left Arm Latex Allergy My stuff Test Needs Wheelchair

Work (989) 849-0912 Other Cur Chart MRN 190211134143193 EMRN 190211134143193 PCP twprovider, TwProvider

Scroll bar available

Encounter Toolbar

- Can view the encounter or date of service selected from the Encounter Toolbar in top right.

The screenshot displays the Encounter Toolbar interface. At the top right, it shows the user's name "AMANDA LIVINGSTON" and a "SIGN OUT" button. Below this, there are tabs for "Directives", "Insurance ALL SAVERS", "MRN 001000643525901", "AKA", and "Other". A red warning icon is present next to "MED & NONMED". Below these tabs are two buttons: "R" (blue) and "FYI" (yellow). The main section shows the date "13-Oct-2020" in a red box, followed by the patient name "Michael, Gary" and the encounter type "Appointment" with a green checkmark icon. There are two dropdown menus for selection. At the bottom right, there are four icons: a lightning bolt, a document with an arrow, a document with a checkmark, and a calendar.

Color Palette

- You can update your Color Palette. From the Site Map, chose My Preferences.
- On the General tab, choose Color Palette.

The screenshot shows a web application window titled "My Preferences". At the top, there are several tabs: "All", "Alerts", "Charge", "General" (which is selected and highlighted in blue), "HMP", "Meds", "Meds/Orders", "Note", "Order Status Reason", "Orders", "Problem", "Results", and "System". Below the tabs is a search bar with a dropdown menu set to "Preference" and another dropdown set to "Contains", followed by an empty text input field. The main content area is a table with two columns: "Preference" and "Value". The "Color Palette" row is highlighted in yellow, and its value "Allscripts Dark" is also highlighted in yellow. Other rows include "Add to Favorites Lists Automatically" (N), "Always Present Print Dialog When Printing Rx" (Y), "Always Present Site Selector for User" (Y), "APM Default Tenant", "APM Password", "APM Username", "CareGuide Default Opening Section" (All), "CVE Interactive View Default", "Create Overdue Reminder Task" (Y), "Sets the default structured note section to pull comments into Clinical Summary (RFV)" (Reason for Visit), "Sets the default structured note section to pull comments into Clinical Summary (TP)" (Plan), "Default Entering For Provider ID" (Livingston, Amanda), "Default section within Patient Profile Dialog" (Clinical Information), "Default Specialty ID" (Pediatrics), and "Default Supervising Provider ID".

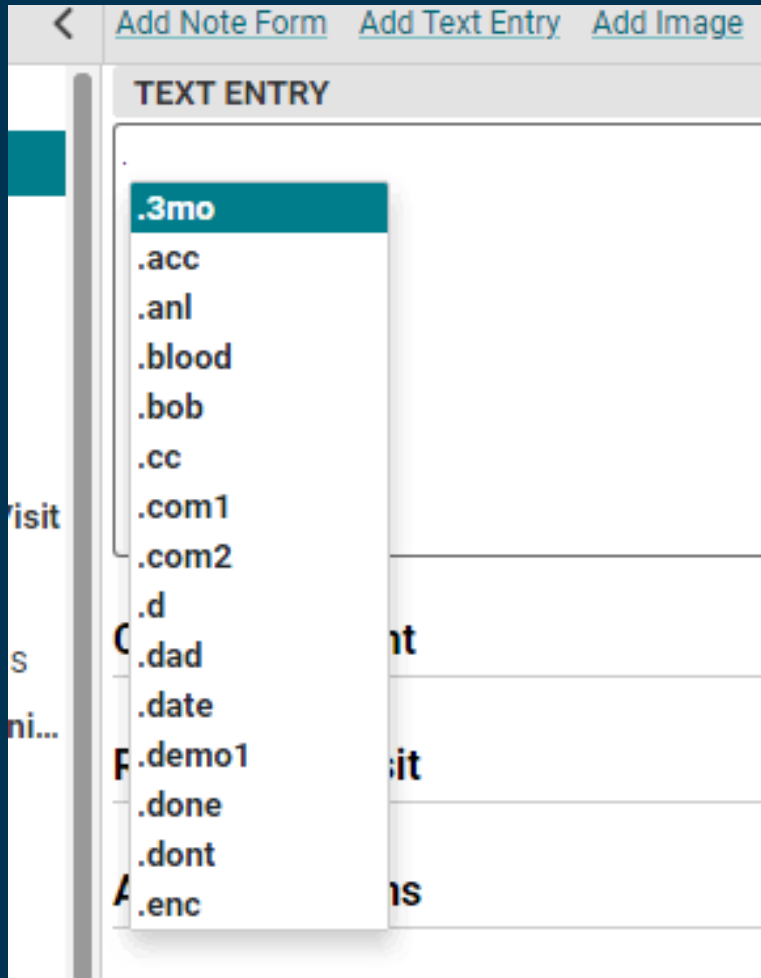
Preference	Value
Add to Favorites Lists Automatically	N
Always Present Print Dialog When Printing Rx	Y
Always Present Site Selector for User	Y
APM Default Tenant	
APM Password	
APM Username	
CareGuide Default Opening Section	All
CVE Interactive View Default	
Color Palette	Allscripts Dark
Create Overdue Reminder Task	Y
Sets the default structured note section to pull comments into Clinical Summary (RFV)	Reason for Visit
Sets the default structured note section to pull comments into Clinical Summary (TP)	Plan
Default Entering For Provider ID	Livingston, Amanda
Default section within Patient Profile Dialog	Clinical Information
Default Specialty ID	Pediatrics
Default Supervising Provider ID	
Default to Quick List Favorites	Y

Renamed workspaces

Many End User pages were renamed:

- Call Processing* was renamed to Calls.
- CCI Edit Checking* was renamed and moved to Details - Charge Edits.
- Clinical Desktop* was renamed to Chart
- Daily Schedule* was renamed to Schedule. Provider Schedules has also been incorporated into Schedule
- Dosage Calculator* was renamed to Dose Calc
- Document Completion Tasks* was renamed to Doc Tasks (this page is also referred to as batch signing)
- Manage 2nd Factor Account* was renamed to 2nd Factor
- Manage Allscripts Security Account* was renamed to My Security Account
- Medication Details was renamed to Medication Administration Details for medication admin orders
- Personalize* was renamed to My Preferences or Customize, depending on the context
- RxAlertDialog* was renamed to Drug Checking
- Task List* was renamed to Tasks
- Unfinished Calls is now a flyout of the Calls page
- Worklist* was renamed to Worklists
- Education Session Dialog* was renamed to New Education Session when creating a new education session, Edit Education Session when editing an existing education session, and Education Session when viewing an education session

Macros

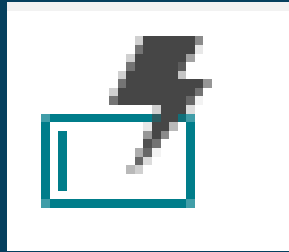


- Your macros will come with you into the new version.
- The EHR will now suggest macros for you when you type the “period”.

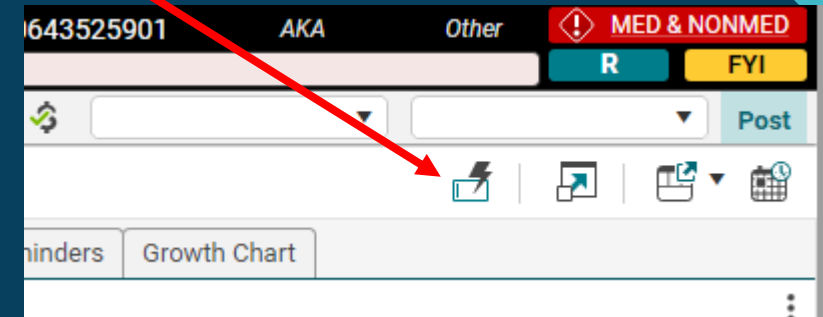
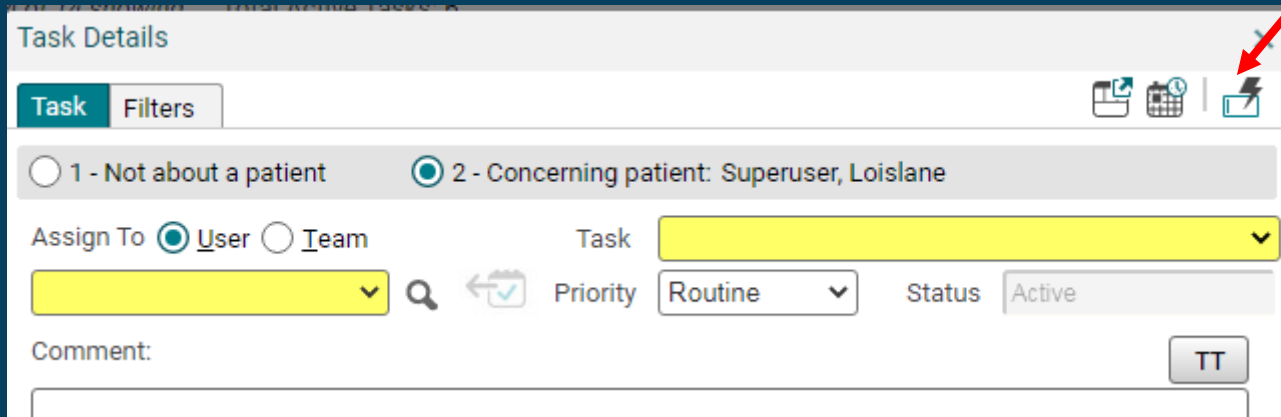
Macro refresher- in case you need it

- A macro is a shortcut you create that when entered into the system will automatically expand into a larger phrase or series of phrases.
- A macro can be used to automatically enter simple, repetitive phrases including commonly used sentences and education in your documentation.

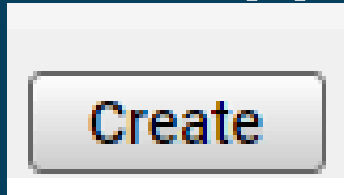
A. Click the macro button.



or



B. A macro edit box will appear for you to begin creating.
C. Click Create.



The screenshot shows a window titled "My Macros" with a search bar at the top and an "Include Enterprise" checkbox. Below is a table with columns: Shortcut, Expanded Text, Description, Owner, and Inact... At the bottom are buttons for "Create", "Edit", "Copy", "Inactivate", and "Close". A red arrow points from the "Create" button in the screenshot above to the "Create" button in this window.

Shortcut	Expanded Text	Description	Owner	Inact...
.3mo	Hello: The labs ordered have not been p...	3 month labs	Livingston, Amanda	
.acc	The patient was accompanied by the foll...	accompanied by	Livingston, Amanda	
.anl	Amanda N. Livingston EHR Trainer	name	Livingston, Amanda	
.apt	appointment		Livingston, Amanda	Y
.blood	Patient called in requesting blood work r...	Wants bloodwork results	Livingston, Amanda	
.bob	Robert Allscripts Patient Care Rep ETSU ...	name	Livingston, Amanda	
.cc	Chief Compliant: Patient presents with a...	boot camp cc	Livingston, Amanda	
.com1	I called and spoke with patient 48 hours ...	boot camp	Livingston, Amanda	

Owner: Livingston, Amanda

Shortcut: .refill

Alphanumeric only

1

Description: pt req refill

<< Show Merge Fields

2

Patient called in requesting refill on this medication.

3

D. Create your macros.

Verify Merge Fields

Save

Cancel



1. **Shortcut** will allow you to put in your short phrase for your macro.



2. **Description** will explain what the macro is for.



3. Information placed into the text field will be distributed in the area your macro is placed.

E. Save your macro.



- The new macro will be added to your My Macros list.
- From this window, you can Create, Edit, Copy, and Inactivate.
- They are not easily removed from the system.

The screenshot shows a window titled 'My Macros' with a search bar at the top left and an 'Include Enterprise' checkbox at the top right. Below is a table with five columns: Shortcut, Expanded Text, Description, Owner, and Inact... At the bottom of the window are buttons for 'Create', 'Edit', 'Copy', 'Inactivate', and 'Close'.

Shortcut	Expanded Text	Description	Owner	Inact...
.3mo	Hello: The labs ordered have not been p...	3 month labs	Livingston, Amanda	
.acc	The patient was accompanied by the foll...	accompanied by	Livingston, Amanda	
.anl	Amanda N. Livingston EHR Trainer	name	Livingston, Amanda	
.apt	appointment		Livingston, Amanda	Y
.blood	Patient called in requesting blood work r...	Wants bloodwork results	Livingston, Amanda	
.bob	Robert Allscripts Patient Care Rep ETSU ...	name	Livingston, Amanda	
.cc	Chief Compliant: Patient presents with a...	boot camp cc	Livingston, Amanda	
.com1	I called and spoke with patient 48 hours ...	boot camp	Livingston, Amanda	