



Compliance Manager

User Group Meeting
Sep 19, 2024

Healthicity Presenter & Facilitator



Brian Burton, CHC, PMP Chief Compliance & Privacy Officer

Client Success Managers

Carrie Baxter Client Success Manager

Dawn Tucker Senior Client Success Manager



Remo Peshkepia Product Manager - Compliance Solutions

Client Success Representatives

Kelly Snow Client Success Representative

Jason Wolf-Mann Client Success Representative

Compliance Manager User Group



Focus On Your Needs, Preferences & Priorities

- ✓ What are your strategic priorities?
- ✓ What new features and functionality does your organization need?
- ✓ How can Compliance Manager be more usable, intuitive and simple?
- ✓ What is the priority for changes, enhancements and new features within Compliance Manager
- ✓ In application polls

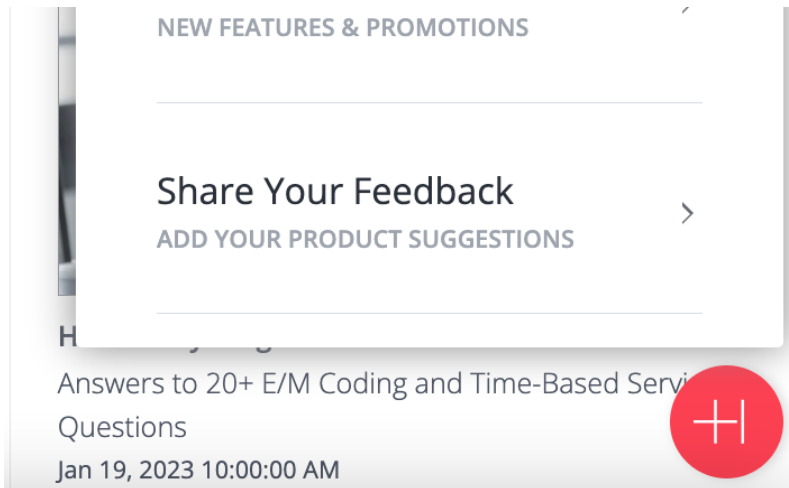
We Want to Hear from You

- ✓ Enter questions or raise your hand
- ✓ Every opinion counts
- ✓ We'll be stopping to respond and discuss

User Group: Feedback & NPS Survey



Feedback



NPS (Net Promotor Score)



Agenda



- Compliance Corner *Brian Burton, CHC, PMP*
- Sep 2024 Release
- 2024 Roadmap, Features in Build, Updates
- Incident 2-way Communication *Release Date Oct 28, 2024*
- Training Center – Updated learner's *Release Date Oct 28, 2024*
- Polling Questions
- Q&A



Compliance Corner

Brian Burton CHC, PMP
Chief Compliance & Privacy Officer

HIPAA Security Risk Assessment

September 19, 2024

Sep 23, 2024 Release



1. Business Associate Manager relabeled Third Party Manager
2. Sections visible to reporter - Public Incident Reporting templates
3. Edit Incident Domain and Sub domain from Incident Details section
4. Access to document editor after review and approval tasks are completed
5. Quick search when adding documents from document center
6. Link documents created from Incident corrective actions and risk mitigating actions
7. Mitigating Actions list relabeled Mitigating and Corrective Actions
8. Third Party Management fields relabeled

Document Owner to Contract Owner

Document Author to Contract Author

Document Number to Contract Number

Document Type to Contract Type

2024 Roadmap & Features in Build



Q3

- Third Party Management *released July 29, 2024*
- Incident Two Way Communication *Oct 28 release*

Q4

- HIPAA Breach Risk Assessment *(Design/Build)*
- Litmos Task Integration *(Design/Build)*

Other Features – ETA Pending

(Oct - Dec)

- Active Directory integration

Building

- Add location as report graphics filter option
- Hide incident template fields from reporter
- Categories & Departments by template
- Template Permission Assignments



1. Incident 2-way Communication

- Reporter to compliance
- Compliance to reporter
- MyIncidents Queue
- Messaging & documents

2. Assign Categories to Incident Templates

- Limit categories available when reporting a new incident or managing a reported incident

Template Permissions

Assignment



+ Permissions to View Incident ✕

Grant permissions to view the incidents reported using this template to Incident Managers from the options below. Access is restricted by location.

SELECT MANAGER * Select all

SELECT LOCATION * Select all

Connect Domain



MyIncident Queue

- Incidents in **Draft** & Reporter's view of *Reported Incidents*

Report Incident ^

Draft Incidents

Reported Incidents

Incidents Risk Assessments HIPAA Risk Assessments HIPAA Workplans Audits Attestations My Incidents

My Incidents

Incident No	Title	Date Reported	Type	Status
-----	ui/ux document	Draft	Privacy Breach	● Drafting
-----	new 3 audit	Draft	Privacy Breach	● Drafting
7445	Anti-Kickback Statute	08/29/2024	Privacy Breach	● Submitted
7445	Anti-Kickback Statute	09/05/2024	Privacy Breach	● Investigating
7445	Anti-Kickback Statute	09/05/2024	Privacy Breach	● Investigating
7445	Anti-Kickback Statute	09/05/2024	Privacy Breach	● Closed
7445	Anti-Kickback Statute	09/05/2024	Privacy Breach	● Closed
7445	Anti-Kickback Statute	09/05/2024	Privacy Breach	● Closed

Training Center Update – New Learner's Dashboard



Current Learner's Dashboard

Assigned Training Metrics Total 27

To do

10

Overdue

2

Completed

17

My Training

[See All Assigned Courses & Learning Paths](#)

Not Started | In Progress | Overdue | Completed

Search for assigned courses and learning paths **Not Started** Q

Search for assigned courses and learning paths Not Started

Recently Viewed

Recent Achievements [View All](#)

New Learner's Dashboard *Release Date Oct 28, 2024*

My Training >

Overdue (4) >

Training Metrics

4	11
Overdue	In Progress
7	3
Not Started	Completed

In Progress (11) >

Recent Achievements [Show All >](#)

- Course with Link
- HY Comp
- HY ILT Course

Registered sessions [Show All >](#)

You have no live sessions scheduled

[Browse Available Sessions](#)

Not Started (7) >

12

Training Center Update –

New Learner's Dashboard – Communication



- Email notification to Compliance Manager Admin & Manager level users
- Knowledge base articles
- Compliance Manager in-application alert to all users

Training Center Update –

New Admin Dashboard / Premium Training Center Clients



- **Premium Training Center & Alternate Admin View**

Steps to Activate/De-activate

1. Account Settings
2. Theme
3. Select Layout – Mega Navigation
4. Check V2 Manager View
5. Save

Training Center Update –

Training Center **Task Integration** & Compliance Manager



- Training assignments to appear in Compliance Manager task list
- Overnight updates to training *completion status*
- No effect on notification emails generated from the training center
 - Assignment notifications
 - Assigned training reminders

Polling Question #1



Overnight updates to training completion status sufficient?

1. Yes
2. No

Polling Question #2



From a reporter's perspective – Incident *Type* or *Category*

1. Incident Type
2. Incident Category

My Incidents

Search

Incident No	Title	Date Reported	Type	Status
-----	ui/ux document	Draft	Privacy Breach	Drafting
-----	new 3 audit	Draft	Privacy Breach	Drafting
7445	Anti-Kickback Statute	08/29/2024	Privacy Breach	Submitted
7445	Anti-Kickback Statute	09/05/2024	Privacy Breach	Investigating
7445	Anti-Kickback Statute	09/05/2024	Privacy Breach	Investigating
7445	Anti-Kickback Statute	09/05/2024	Privacy Breach	Closed
7445	Anti-Kickback Statute	09/05/2024	Privacy Breach	Closed
7445	Anti-Kickback Statute	09/05/2024	Privacy Breach	Closed

Polling Question



Polling Question



Polling Question



Questions & Answers



Reach Out To Us!



- Feel free to contact us. We're available and want to do what's important to you.
- Remo.Peshkepia@healthicity.com
- Brian.Burton@healthicity.com



Thank you for your time and input!