



Compliance Manager

User Group Meeting
July 18, 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

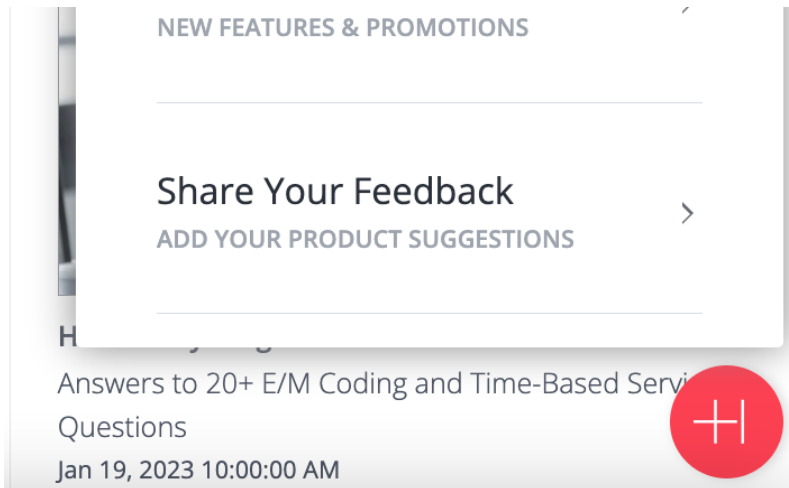
We Want to Hear from You

- ✓ 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)



2024 Roadmap & Features in Build



Q1

- In-application Document Editing (released)

Q2

- Drag & Drop Documents Phase II/All Areas
June 24, 2024

Q3

- **Third Party Management** *July 29, 2024*
- Incident Two Way Communication

Q4

- HIPAA Breach Risk Assessment

Other Features – ETA Pending

(July-Sep)

- Litmos task integration
- Active Directory integration

Design

- Incident Two Way Communication

Building

- Categories & Departments by Template *(76% voted useful feature)*
- Adding sections to checklists
- Option to make checklist comments required
- Add Location as dashboard graphics filter (Mar polling question. *75% voted useful feature*)

Agenda



- July 29 2024 Release
 - Third Party Management
- 2024 Roadmap, Features in Build, Updates
 - Incident Two-way Communication
- Polling Questions
- Q&A

June 2024 Release



- **Third Party Management –**
 - Business Associates Enhancement

Show/Hide Incident Template Fields



The screenshot displays the 'Template Library' section of a compliance management application. The top navigation bar includes 'My Workspace', 'Documents', 'Reports', 'Training', and 'Admin'. The 'Admin' section is active, showing sub-navigation for 'My Organization', 'Useful Links', 'Bulletin Board', 'Notification Settings', and 'Template Library'. The left sidebar lists various compliance domains, with 'Incidents' expanded to show 'Fields (1)', 'Lists (1)', and 'Sections'. The main content area shows a template configuration for 'DOES THE REPORTED ISSUE INVOLVE AN OVERPAYMENT'. Fields include 'ADD BUSINESS ASSOCIATES', 'PERSONS INVOLVED', 'ATTACH DOCUMENTS', 'DEPARTMENT', 'CATEGORY', and 'ESTIMATED RISK'. Each field has a control and a set of icons for editing, visibility, and deletion. A red box highlights the visibility icons (an eye and an eye with a slash) for the 'DEPARTMENT' and 'CATEGORY' fields. At the bottom right, there are 'Previous' and 'Next' buttons.

Show/Hide Incident Template Fields



- Limit the fields displayed to reporter while retaining in incidents details.
- Required fields
 - Will remain required when editing incident details (admin/manager)

Third Party Management



- Associate multiple documents to third party profile
- Contract expiration alerts
- Schedule contract renewal tasks
- Customize third party profile and contract document templates
- Customize renewal task reminder schedule
- Assign review and approval tasks

Incident Two-way Communication



- Two-way Communication will include
 - Reporter can send message regarding previously reported. Incident (request for update)
 - Admin/Manager respond to messages received from the reporter or start discussion with reporter (request for additional information, acknowledgement of reported concern)
 - Admin/Manager access to discussion log
 - Include/exclude when exporting incident details

Polling Question #1



Should incident reporters see current status of incidents they've reported?

- Yes
- No
- Not sure

Polling Question #2



Which Incident details page design do you prefer

- Existing
- All sections expanded (scroll to navigate or use quick jumps)
- Tabs

Polling Question #3



What should be represented as last document revision date

- Last date document approved
- Last date document published

Polling Question #4



Should closing incident with open corrective action tasks be allowed?

- Yes
- No

Polling Question #5



- Are incident managers ever expected to manage incident templates (e.g., field, permissions)?
- Yes
- No

Polling Question #6



- Is the ability to add contract & department list entries on demand valuable to you?
- Yes
- No
- Never – as an admin, I want to control those lists

Questions & Answers



Reach Out To Us!



- Feel free to contact us. We're available and want to do what's important to you.
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Thank you for your time and input!