

# Compliance Manager

User Group Meeting  
May 30, 2024

# Healthicity Presenter & Facilitator



**Brian Burton, CHC, PMP** Chief Compliance & Privacy Officer



**Remo Peshkepia** Product Manager - Compliance Solutions

**Carrie Baxter** Client Success Manager

**Kelly Snow** Client Success Representative

**Jason Wolf-Mann** Client Success Representative



**Dawn Tucker** Senior Client Success Manager

# 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: Goals and Objectives



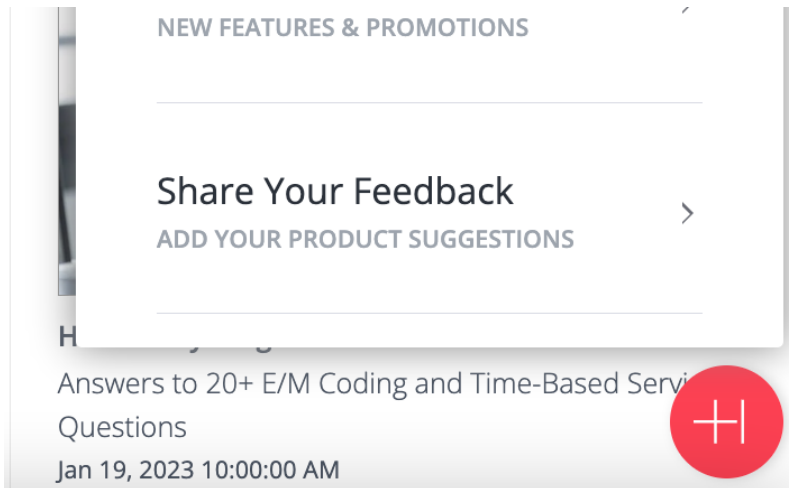
## Focus On Your Needs, Preferences & Priorities

- ✓ 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

# User Group: Goals and Objectives Feedback & NPS Survey



## Feedback



## NPS (Net Promotor Score)



# Agenda



- June 2024 Release
- 2024 Roadmap, Features in Build, Updates
- Training Center Updates Available July 1, 2024
- Polling Questions
- Q&A

# 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**

- Litmos task integration
- Active Directory integration  
*(June-July)*

### **Building**

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

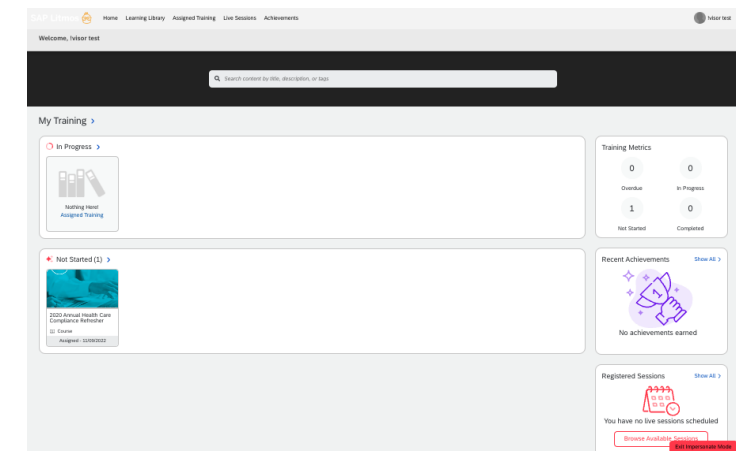
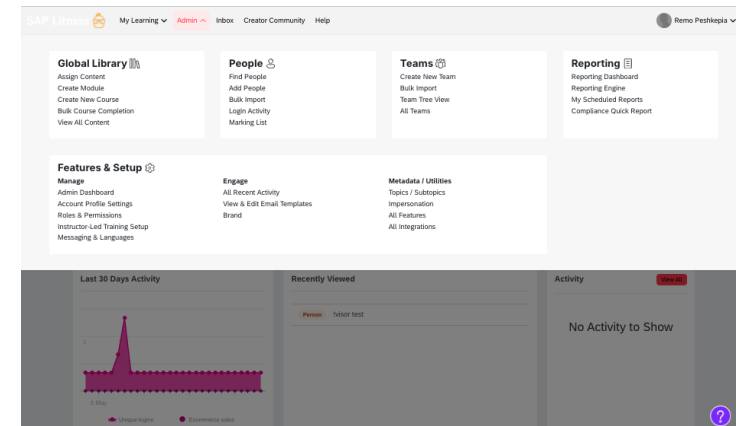


- View only assignment notifications
  - Reduced to one
- Document In-app Editor
  - Track changes on as default

# Training Center Updates



- Administrator View
  - streamlined navigation
  - access assigned training from the admin dashboard
- Learner View
  - simplified dashboard & access to training



# Polling Question 1 – Training Center Admin View



Which Admin dashboard version do you prefer?

- Original
- New

# Polling Question 2 – Menus



Which Learner dashboard version do you prefer?

- Original
- New

# Polling Question 3 – Menus



Do you prefer to see menus upon hover or click to show the menu?

- Menu upon hover
- Click to show

# Polling Question 4 – Incident Investigations



When multiple investigations assigned to an incident, is it preferable to alert the final approver when each is completed?

- Yes
- No
- It depends

# Polling Question 5 –



Draft Incident should appear to the reporter in their task list as a pending task

- Yes
- No
- Maybe but I have a suggestion

# 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](mailto:Remo.Peshkepia@healthicity.com)
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Thank you for your time and input!