



# Compliance Manager

User Group Meeting  
Oct 24, 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



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## 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

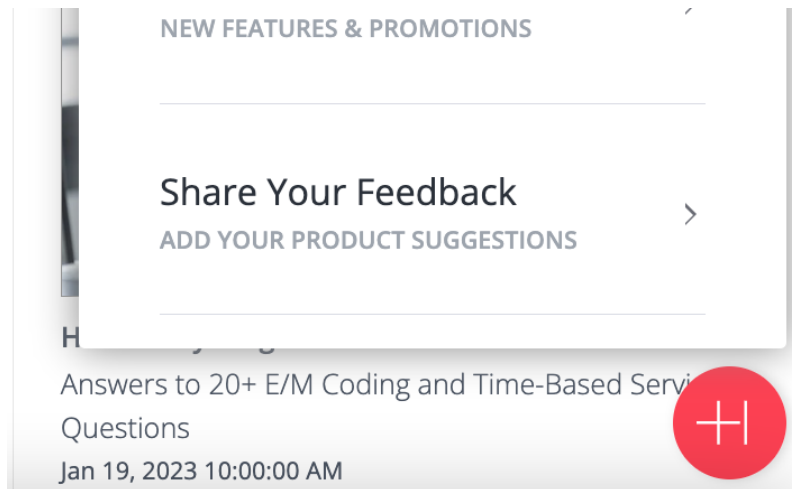
## ***We Want to Hear from You***

- ✓ 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



- Oct 2024 Release
- 2024 Roadmap, Features in Build, Updates
- Q&A

# October 28, 2024 Release



1. Incident 2-way Communication
  - Reporter to compliance
  - Compliance to reporter
  - MyIncidents Queue
  - Messaging & documents
2. Sort Templates by Location
3. Hide Source List Entries
4. Training Center Learner View Update

# 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)*
- Active Directory *(Design/Build)*

### **Other Features – ETA Pending**

*(Oct - Dec)*

- Active Directory integration

### **Building**

- Categories & Departments by template *(Nov 18 2024 release)*
- Filter Report graphics by Location *(Nov 18 2024 release)*
- Hide incident template fields from reporter *(Nov/Dec 2024 release)*
- Streamline Template Permission Assignments *(Nov/Dec 2024 release)*

# 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) >**

**In Progress (11) >**

**Not Started (7) >**

### Training Metrics

4	11
Overdue	In Progress
7	3
Not Started	Completed

### 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](#)

# Incident Two Way Communication



- **Messaging Feature:** Direct communication between reporters and compliance team members for clarifications and updates.
- **New Report Incident Button:** Quick and easy incident reporting directly from the workspace.
- **My Incidents View:** Combines reported and draft incidents under one list for better organization and tracking.
- **Incident Status Visibility:** Reporters can view the current status of their incidents for greater transparency.
- **New Reporter View:** Access individual reported incidents through a dedicated view.
- **File Attachment in Discussions:** Attach files in discussions to provide additional context for resolving incidents.
- **Messages Discussion Tab:** New tab for discussions related to reported incidents.

# Incident Two Way Communication FAQ



## **Who gets notified when a reporter messages about a reported incident?**

**A.** The user named as final approver.

## **What if there's no final approver assigned to the incident?**

**A.** The notification will be directed to the user named as Accountable in the permissions for the template used to report the incident. If no user is named as Accountable, the notification is directed to the first user assigned the Admin role

## **Does the reporter get an email when a message is directed to them?**

**A.** No. Reporters are alerted to new and pending messages in the Messages section of their Compliance Manager Workspace.

# Incident Two Way Communication

## Post Release Changes



### **ASAP Post Release**

1. Incident details page Discussion tab disabled for Compliance Line Hotline incidents and Publicly reported incidents
2. New Discussion message related Email notification to privileged user to include “incident” ahead of incident number.

### **Scheduled for November 18 Release**

1. Privileged User Directed to Incident Details Discussion Tab – When accessing a Discussion message via email link or in-application Discussion message list, the user will be directed to the incident details Discussion tab.
2. Other changes based on client feedback.
3. Quick access to Discussion tab through Workspace Menu option

# 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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- [Brian.Burton@healthicity.com](mailto:Brian.Burton@healthicity.com)



Thank you for your time and input!