

Compliance Manager

User Group Meeting
Dec 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

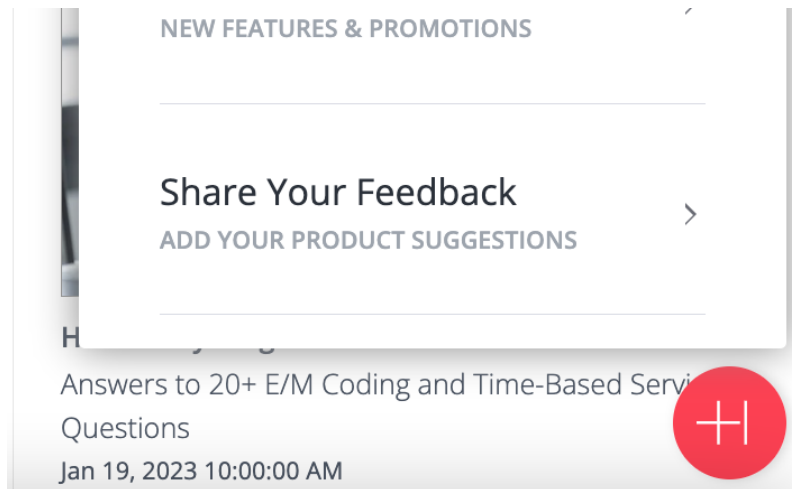
We Want to Hear from You

- ✓ 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



- 2024 – 2025 Roadmap, Features in Build, Updates
- Dec 2024 Release
- Polls
- Q&A

December 23, 2024 Release



- **Re-label Contract Document Template Fields**
- **HIPAA Security Risk Assessment Report***
 - Run date v. survey completion date
- **Submit Documents with Publicly Reported Incidents** (pending from Junil)
- **Filter Reports by Location (Graphics)**
 - Auto filter table view upon click – *Included with Jan 20, 2025 release*



Compliance Manager Report

Security Risk Assessment, Analysis, & Risk Management Plan

Test New Enterprise Client

Report Run Date: Wednesday, December 18, 2024

Assessment Completion Date: Thursday, December 05, 2024

2024 Roadmap & Features in Build



Q3

- Third Party Management *released July 29, 2024*

Q4

- Incident Two Way Communication *Oct 28 release*

Q1 2025

- Active Directory – User Sync *(Mid Feb)*
- HIPAA Breach Risk Assessment *(Design/Build)*
- Litmos Task Integration *(Design/Build)*

Other Features – ETA Pending

Building

- Hide incident Template Fields from Reporter *(Moved from Dec 2024 release to Jan 2025 release)*
- Streamline Template Permission Assignments *(Moved from Jan 2025 release to Feb 2025)*
- Incident Title Appears Upon Hover (Task List)
- Expanding Task List Headers

Active Directory

(Activate, De-activate Users)



Navigation bar: [+](#) [My Workspace](#) [Documents](#) [Reports](#) [Training](#) [Admin](#)

Sub-navigation: [My Organization](#) [Useful Links](#) [Bulletin Board](#) [Notification Settings](#) [Template Library](#)

Left sidebar menu:

- Overview
- Users 35
- Bulk User Import Files ⓘ
- Locations 15
- Bulk Location Import Files
- Users
- User Sync Settings**

Main content area: **User Sync Settings**

Enable Active Directory

ACTIVE DIRECTORY TOKEN

Polling Question #1



Do you find the incident two-way communication feature beneficial to your organization?

1. Yes
2. No
3. Have used it but still assessing
4. Haven't used it yet

Incident Reporting Hotline



- **Reporting to Smart AI Agent**

- Responsive
- Efficient
- Faster
- Cost effective
- Anonymous

Polling Question #2



What are some things most important to you as a compliance professional when thinking about anonymous reporting?

Please enter in chat

Polling Question #3



What is the typical number of incidents reported per month in your organization?

1. 0-15
2. 15-30
3. 50+

Polling Question #4



Would the option of an incident hotline encourage reporting?

1. Yes
2. No
3. Not sure

Polling Question #5



Do you think your staff would be more or less likely to report using a hotline if they knew it was to an AI agent?

1. More likely
2. Less likely
3. Not sure

Polling Question #6



Would you want reporters to know they were reporting to an AI agent at the start of the call?

1. Yes
2. No
3. Not sure

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!