

Compliance Manager

User Group Meeting
March 20, 2025

Healthicity Presenter & Facilitator



Remo Peshkepia Product Manager -
Compliance Solutions

Client Success Managers

Carrie Baxter Client Success Manager

Dawn Tucker Senior Client Success Manager

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

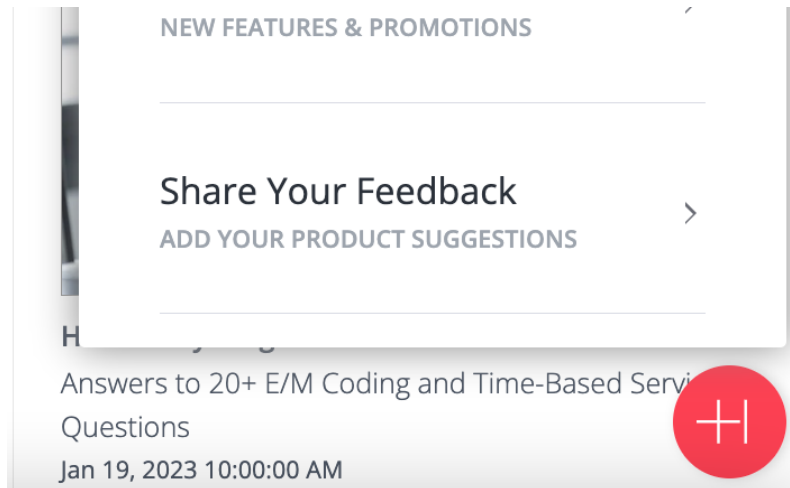
We Want to Hear from You

- ✓ 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)



2025 Roadmap & Features in Build



2025

Design/Build

- Active Directory – User Sync *April Release/Date TBD*
- Litmos Task Integration *(Building)*
- HIPAA Breach Risk Assessment *(Design/Build)*
- Incident Hotline *Release Date 4-15-25*

Agenda



- 2025 Roadmap, Features in Build, Updates
- Mar 2025 Release
- April 2025 Release
- Q&A

March 2025 Release



- **Checklist Text Answer Type as Rich Text ***
 - *Comment field to appear when prompted*
 - *Sticky Headers*
- **Designate Checklist Question Comment Field Required**
- **Recurring Audits & Related Checklist Due Dates ***
 - *Checklist due date based on audit frequency & designated checklist due date*
- **Incident Reporters Can Download Documents they Submitted with Incident**
- **Incident Status Updates are Editable ***
 - *Activity log tracking*
 - *Comment identified as edited*

March 2025 Release – Checklist Text Answer Type



Test Audit

[← Back](#)


Test Text Field

ID	Question	Answer	Comments
11806	Question One	<p>B I ?</p> <div style="border: 1px solid #ccc; height: 100px;"></div>	<p>+ Add Comment</p> <p>+ Add Document</p>
<p>+ Attach Incident to Checklist</p>			
11806	Question One	<p>B I ?</p> <div style="border: 1px solid #ccc; height: 100px;"></div>	<p>+ Add Document</p>
<p>+ Attach Incident to Checklist</p>			

March 2025 Release – Edit Incident Status Updates


< Write New Status Update


Messages 3 Message(s)

Super Admin 03-20-2025 | 11:49 AM Assigned for final approval 

< Write New Status Update

Messages 2 Message(s)

Super Admin 03-20-2025 | 11:46 AM @cmuser 1726641093268 Please update me by March 25th (edited) 

Super Admin 03-20-2025 | 10:26 AM Investigating (edited) 

Show 5 Entries



Incident Updates

The categories shown in the table below have had recent updates made to the information documented in the case.

Section	Update Information	New Value	Old Value
Status Update	Message	@cmuser 1726641093268 Please update me by March 25th	@cmuser 1726641093268 Please update me by March 21st

Close

April 2025 Release



- **Delete Incident Status Updates**
 - *Activity log tracking*
- **Audits and First Task Notification ***
 - *Challenge:*
 - *One Time Audits – Assigned the date submitted*
 - *Recurring Audits – Scheduled to recur monthly, quarterly, annually, etc. are assigned on the due date of the driving audit*
- **CM/AM Linked Audits & Audit Queue Filter**
 - *Toggle to show*
 - *Filter on provider/coder subject of audit*
- **SmartLine Incident Reporting**
 - *AI Powered Incident Reporting*
 - *Integrated with Compliance Manager*
 - *Two-way Communication*

Audits & First Task Notification



Once a due date is selected, a new dropdown field, **AUDIT DUE REMINDER DAYS**, appears to include the following options:

1. 30 days
2. 60 days
3. 90 days
4. 120 days
5. 180 days
6. Custom

If *Custom* selected a short text field labeled **FIRST REMINDER AT _____DAYS** appears below the **FREQUENCY** field where a number can be entered.

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



Thank you for your time and input!