



# Compliance Manager

User Group Meeting  
Feb 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

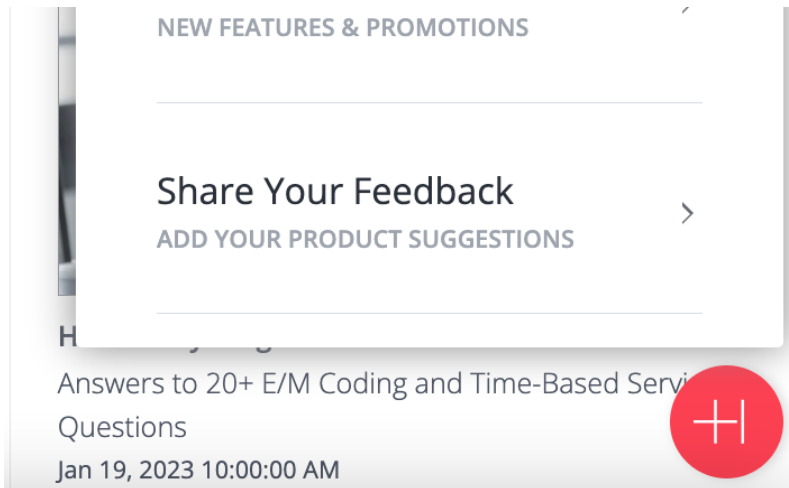
## ***We Want to Hear from You***

- ✓ 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)



# Agenda



- Jan 2025 Release
- Feb 2025 Release
- 2025 Roadmap, Features in Build, Updates
- HIPAA Breach Risk Assessment Design
- Polls
- Q&A

# January 2025 Release



- **Hide Incident Template Fields\***
  - *Incident Severity & admin, investigator, manager view*
- **Task View Enhancements\***
  - Incident Title on Hover
  - Expandable Column Headers
- **Audit Created Date\***

# February 2025 Release



- **Incident Templates & Permissions\***
- **List View – New Columns in Custom Checklists**
  - Location
  - Created by
- **Audit Queue Filter & Recurring Audits\***
- **Third Party Management \***
  - Third Party Queue & Mass Actions
  - Unarchiving Third Party Profiles
- **Audit Follow up Tasks & Activity Log**
- **Incident Import Queue\***
- **Workspace Menu on Hover\***

# 2025 Roadmap & Features in Build



## 2025

### Design/Build

- Active Directory – *User Sync (Building)*
- Litmos Task Integration *(Building)*
- HIPAA Breach Risk Assessment *(Design/Build)*
- Incident Hotline *(Building)*

### Discussion

- Report Enhancements\*
- Compliance Workplan
- Checklists as Module
- Role & Access Customization

# Polling Question #1



## **2025 Feature Order of Importance** (multi-select)

1. Report Enhancements
2. Compliance Manager Workplan
3. Checklists as a Module
4. Role & Access Customization
5. Document Center & Attestations
6. Other

# HIPAA Breach Risk Assessment



- Features
  - Exception Analysis & Breach Assessment
  - Results
  - Survey
  - Breach Risk Assessment Queue
  - Start Assessment from Incident
  - Create Incident from Assessment
  - Stand-alone Assessment (not linked to an incident)

# Polling Question #2



## **How should HIPAA Breach Risk Assessment tool live in Compliance Manager?**

1. Independent Module
2. Accessed Through HIPAA Security Risk Assessment
3. Accessed Through Incident Module

# Polling Question #3



## **How should HIPAA Breach Risk Assessment Survey Questions be Presented?**

1. One Question at a Time
2. Groupings (e.g., nature of involvement, demographics)
3. All Survey Questions in One View

# Polling Question #4



**Would View Only access to Third Party Profiles be Useful?**

1. Yes
2. No
3. Not Sure

# Polling Question #5



**Would View Only access to Third Party Profiles Encourage Utilization?**

1. Yes
2. No
3. Not sure

# Polling Question #6




**Do you find the weekly summary of Overdue Tasks email useful?**

1. Yes
2. No

# Edit/Delete Incident Status Update Messages






### Updates

The fields 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	I contacted the patient to clarify the issue. Patient advises the provider was unfriendly and wouldn't give her the medications she wanted.	I contacted the patient to clarify the issue. Patient advises the provider was very aggressive and wouldn't give her the medications she wanted.

[Close](#)



### Updates

The fields 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		I contacted the patient to clarify the issue. Patient advises the provider was very aggressive and wouldn't give her the medications she wanted.

[Close](#)

# Polling Question #7



**Should details of edited Status Update Messages be displayed in Activity Log? (see next slide)**

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



Thank you for your time and input!