Roadmap and Recent Enhancements

CustomerConnect 2025

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Recent Enhancements

Recent Portal Enhancements

- Open Portal from the Navigation Menu *[2025.2]*

- Navigation Panel in Risk Portal Now Collapses and Expands *[2025.2]*

- Easily Identify Keyword Term in Risk Portal Policy Search Results Description *[2025.2]*

- New Division and Folder Filter for Policy Search in Risk Portal *[2025.3]*

- View Related Policies in Risk Portal Policy Search Results *[2025.3]*

Recent Portal Enhancements

- Configure Division and Folder Filters for Auto-Authenticated Portal ExternaLinks *[2025.3]*

- New Module Access Options for Risk Portal *[2025.3]*

- **Demonstration**

SAi360

Select/Deselect Buttons Enabled for Updating Employee's Groups and Home Page Tabs
[2025.3]

Recent Enhancement: Select and Deselect Buttons

Recent Risk Intelligence Enhancements

- Risk Intelligence Reports for RCM Content Item Can Include Title *[2025.3]*

- New Risk Intelligence Virtual Evidence Room Master Report *[2025.3]*

Recent To Do List Enhancements

To Do List Items Streamlined for Default Module Type *[2025.5]*

Roadmap

Updated Priorities for 2025 and Beyond

SAI360

Q2	Q3	Beyond

Search

Search Result Enhancements
Enhance the search result experience through the addition of stemming, keyword highlighting, and attachment searching.

Portal Enhancements
More intuitive policy search experience via the portal and enhancements to the portal.

Employee Experience

Employee Experience
Single location for employees to view and complete any SAI360 assignments from learning coursework to Conflict of Interest disclosures, as well as the appropriate employees accessing dashboards and related information.

Incidents

Whistleblower Reporting
Ability for end users to report issues, anonymously if desired, as well as receive updates on the issues over time.

Data Management

Export all Published Revisions
Ability to export all published revisions of policies within a date range.

Data Retention
Configurable tool to allow administrators to setup and manage data retention rules

Introduce **AI**-powered capabilities.

Pre-configured Master Risk Intelligence reports
Reports designed to reduce effort to build

Ongoing performance, security and small-scale user requested improvements: These are reviewed and prioritized on a regular basis.

Search Enhancements

- Due to Search related feedback, we have been working to enhance the search experience within:

  - Policy Search Plug-in

  - Contract Search Plug-in and Contract Addenda Search Plug-In

  - Analytics | Search, and

  - Portal Policy Search

- We have changed the search engine we use and added new functionality, that we will share on the next slides.

Search Enhancements: Stemming

- We have added the concept of stemming to Search.

- This means that we break down the keyword(s) and not only search on exactly what the searcher input but related words too.

- For example, if the keyword was "clean" we would return results that may include any of the following: clean, cleaning, cleaned, and other related words.

Search Enhancements: Attachments

- We have added the option to include the contents of attachment files to search.

- This means that we are now indexing the contents of any attachment files added via the paperclip icon.

- We know that clients may use attachments for various purposes.

  - Some organizations may want their attachment files searched, while others do not.

  - When we get closer to adding these new Search enhancements to your database, we will reach out to you regarding searching attachments.

Search Enhancements: Attachments

- If this option is enabled:

  - it is enabled for all modules.

  - There may be more results than previously.

- Note: We are not including the ability to search within attachments in the Portal Policy Search based on client feedback.

Search Enhancements: Keyword Highlighting

- We have added to the Portal Policy Search the highlighting of the keyword to easily locate the keyword.

MENU

🏠 Home

🗒 To Do

🔁 **Policy Search**

📁 Policy Catalog

🎁 Gift Reporting

👤 Conflict of Interest

👥 Vendor Management

ADMINISTRATION

📖 **Policy List**   Relevance ▾   🔽 0 filters

| All of these words ▾ | patient nurse policy | Search |

About 8 results for "patient nurse policy"

⭐ **Code of Ethics**

Published Date Aug 7, 2006 • SAI360 (Corporate) \ AMER \ Use Cases \ Main Division::Main Division \ Policy Manager \ Hospital Manual \ Administration

Description

The organization has developed standards of conduct for all employees that clearly delineate the policies of the organization with regards to all federal, state and local laws with an emphasis on fraud, waste and abuse.

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⭐ **General Policy**

Published Date Oct 4, 2006 • SAI360 (Corporate) \ AMER \ Use Cases \ Main Division::Main Division \ Policy Manager \ 2.6 Hospitals - EMTALA \ EMTALA

Description

To assure that (1) all patients who come to the hospital requesting emergency services receive an appropriate Medical Screening Examination; (2) patients with an emergency medical condition are stabilized; (3) patients requiring or requesting a transfer are transferred appropriately; (4) that the Emergency Department is prospectively aware of which physicians are available on call to provide necessary treatment; (5) through adequate signage, ensure that all patients have the opportunity to review their right to medical screening examination and stabilization for an emergency medical condition, as required by the Emergency Medical Treatment and Labor Act ("EMTALA"). The CEO, Executive Staff, Medical Director, Medical Staff and Department Heads of all hospital departments are responsible to ensure compliance with and implementation of this **policy**.less

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⭐ **Policy for Walk-Outs**

Published Date Jul 29, 2005 • SAI360 (Corporate) \ AMER \ Use Cases \ Main Division::Main Division \ Policy Manager \ 2.6 Hospitals - EMTALA \ EMTALA

Description

To provide a **policy** and procedure for the management of a **patient** leaving the Emergency/Trauma services before the initiation or the completion of the medical screening examination and treatment. This **policy** document provides guidance for the handling of each of these situations.

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⭐ **Screening and Stabilization Policy**

Search Enhancements

- We will be scheduling the search enhancements to be provided to each client in the near future.

- You will receive an email with regard to your search date.

- In the meantime, we have two specific FunTrain events coming up:

  - Portal Policy Search – June 10

  - Search Enhancement Functionality – June 16

  - Let me know if you want to register for these.

Pre-Configured Risk Intelligence Reports

- We continue to provide generic, pre-configured reports to be used within the Risk Intelligence module.

- They may be copied and downloaded an unlimited number of times as needed.

Employee Experience

- We are working to provide organizations a single application to access all their Compliance needs as well as their Training assignments. One login to access all of this together.

- Tomorrow we will have a session that goes into more depth on this enhancement.

Whistleblower
Reporting

- We are working to provide organizations the ability to provide their employees and clients a mobile friendly method for intaking whistleblower reports anonymously and receiving status updates.

- Tomorrow we will have a session that goes into more depth on this enhancement.

Export All Published Revisions

- A new option will be added to the Data Export feature which will allow you to export all of the published revisions of an object within a date range.

- Currently, a user can only export the most recent published revision of an object.

- For example, if a policy had two revisions which were published during the past 18 months, using the new option, the export results will contain both revisions, not just the most recently published revision.

- This new capability will alleviate the need to manually search for past published revisions.

Data Retention

- In the future we would like to create a new feature that will allow organizations to self serve on their data retention (or data purge) needs.

- Clients would be able to select a module and criteria for the permanent deletion of data.

- What would you like to see?

Note: No work has been started on this endeavor yet. We are just collecting your feedback.

AI

- What would you like to see regarding the use of AI in the application?

- What modules would you like to see AI applied to?

- What processes would you like to see AI applied to?

  - Workflow history analysis for duration information?

  - File creation? File analysis and/or summary?

  - Populate fields based on file contents?

- What is your organization's stance toward the use of AI?

Note: No work has been started on this endeavor yet. We are just collecting your feedback.

Questions

Ideas Portal

Open Ideas

- On the next slides we will share with you recently submitted ideas that are open for voting.

- After describing the idea, you can vote for it using a number from 0 to 10 (10 being highest).

- We will then document your votes.

Submitted Idea: ID 1123

Use Artificial Intelligence to complete fields and make language suggestions

- Where: Globally
- Use AI to pull data from files (contracts, policies, regulatory content, etc) to fill in data fields automatically rather than manually by responsible party.
- Use AI to make suggestions on legal language or changes to text.

To vote for this, document your votes from 0-10 on the paper provided.

Submitted Idea: ID 1089

Email creates new RCM Content Item

- Where: Regulatory Compliance Manager

- Add the ability to send an email to a specific SAI360 email address in order to create a new content item.

- One time mapping may be required.

To vote for this, document your votes from 0-10 on the paper provided.

Submitted Idea: ID 1115

Limit ability to delete or replace attachments

- Where: Attachments
- Would like to restrict the ability to delete attachments or edit them.
- Still want the ability for any to add new attachments.
- Want to prevent accidental editing or deleting of attachments when just asking for information.

To vote for this, document your votes from 0-10 on the paper provided.

Submitted Idea: ID 569

Date Field Configuration

- Where: FA3 modules

- Ability to optionally set logic around date field contents and display to the user a message if they are not within the logic.

- Example: Remove the ability to set a "Scheduled Revision Date" in the past.

To vote for this, document your votes from 0-10 on the paper provided.

Submitted Idea: ID 1099

Add Scheduled Reports to Modify Employee

- Where: Maintenance | Employee Management | Employees

- Add the list of which scheduled reports an employee is a recipient for to the Modify Employee pages.

- Furthermore, allow one to add or remove reports from this location (in addition to performing this within Reporting).

To vote for this, document your votes from 0-10 on the paper provided.

Submitted Idea: ID 1103

Auto-Generate ExternaLinks

- Where: FA3 modules
- Ability to click an action and have an externalink URL be created and the URL to be placed in a specific field.
- Ability to do this in bulk also.
- Some one time set up will be required.

To vote for this, document your votes from 0-10 on the paper provided.

Submitted Idea: ID 1105

Add Task CC as a message block for Task Manager

- Where: Messaging for Task Manager
- Add Task CC as a message block to be used with the Task Manager module.

To vote for this, document your votes from 0-10 on the paper provided.

Submitted Idea: ID 1068

Create Subscriptions at the Sub Agency level for Federal Register

- Where: Regulatory Compliance Manager | Content Subscriptions

- Add the ability to subscribe to subagencies within the Federal Register.

- Example: Currently you can subscribe to "Department of Labor" but being able to subscribe to "Employee Benefits Security Administration" is more helpful.

To vote for this, document your votes from 0-10 on the paper provided.

Next Session

- We want to hear from you!

- As part of the **next** session, start thinking about generic product questions you have for group discussion.

- We will try to address as many as we can at the latter part of the next session.

Thank you

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