

Blackbaud Healthcare Solutions Update

Blackbaud Grateful Patient Solution

Blackbaud’s world-class security, privacy, and risk-management teams work every day to ensure the safety of your data by adhering to industry standard practices, conducting ongoing risk assessments, aggressively testing the security of our products, and continually assessing our infrastructure—especially in today’s ever-changing threat landscape.

As we continuously focus on strengthening the security of our solutions, we have enhanced Blackbaud Grateful Patient Solution within ResearchPoint™ with additional field-level encryption for selected sensitive information.

To help you manage patient data in a manner consistent with patient fundraising best practices, we reviewed the best practices offered by the Giving Institute and the Association for Healthcare Philanthropy. Both recommend that six categories of patient health information may be disclosed or used for fundraising purposes without a patient’s written authorization: patient demographic data; health insurance status; dates of patient health care services; general department of service information; treating physician information; and outcome information.

In adherence to those guidelines, we implemented the following enhancements to Blackbaud Grateful Patient Solution:

- A new Grateful Patient table to store certain types of patient data approved for fundraising purposes in an encrypted format.
 - **Insurance:** health insurance status Y/N
 - **Department:** general department of service information
 - **Service Start Date:** start date of service
 - **Service End Date:** end date of service
 - **Physician:** treating physician name
 - **Outcome:** outcome information

ResearchPoint™ Target Analytics Shared (Target Analytics Shared) ▾

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Lookup ID: 8-10005575

WILLIAM B. FUCCILLO
 110 MUNRO DR
 CAMILLUS, NY 13031

Spouse: CYNTHIA B. FUCCILLO
 Household: WILLIAM FUCCILLO and CYNTHIA FUCCILLO
 Primary business: Fuccillo Automotive Group, Inc.

Reports Prospect research report

Link Tank ▾

Wealth Summary | Model Scores | Assets | Giving | Affiliations | Biographical Information

Personal Info | Contact | Biographical Data | Relationships | Documentation | Attribution

Attributes (1) + Add | More ▾

Category	Value	Start date
Date Screened	2/1/2021	

Grateful Patient (6) + Add | More ▾

Category	Value	Date added
Department	Department	02/04/2021
Insurance	Yes	02/04/2021
Outcome	Outcome	02/04/2021
Physician	Dr. Smith	02/04/2021
Service End Date	01/31/2021	02/04/2021
Service Start Date	01/29/2021	02/04/2021

- Updated batch and import functionality, to include the new Grateful Patient fields.
- New Grateful Patient data list, visible on the Constituent record when Grateful Patient Solution scores exist.
- Updated query and research list functionality to include the new Grateful Patient fields.

To begin using the enhanced Blackbaud Grateful Patient Solution, customers will need assistance from the Blackbaud Target Analytics® team. This team will begin reaching out to customers in March to establish a transition date and time to migrate to this new first-class table and batch import process, while also deleting information that may be considered sensitive previously stored in customer-defined attributes. No action is required from Blackbaud Grateful Patient Solution customers until they are contacted by the Blackbaud Target Analytics team.

Frequently Asked Questions (FAQ)

How quickly can I migrate to the new format?

The Blackbaud Target Analytics team will begin contacting Grateful Patient Solution customers in early March to begin the process to change submitted information and file format. The migration process will look to minimize workflow disruption and will take place over the course of 1-2 business days. Note that several customers need to migrate, so it may take a few weeks or months before you are contacted and scheduled.

What steps are involved in migrating to the new format?

1. The Blackbaud Target Analytics team will reach out to the Grateful Patient Solution customer to discuss any needed changes to the submitted information and file.
2. The customer will submit a new file reflecting agreed upon changes. The customer will be offline at this time.
3. The Blackbaud Target Analytics team will program the changes and contact the customer when complete.
4. The customer will resume file submission.

How long will I be “offline” during the migration?

Customers will be offline after they submit the new file. They can resume processing after the changes have been implemented and they've been contacted by the Blackbaud Target Analytics team. Usually within 1-2 business days.

Can I continue using the current submission file we are sending as part of the Grateful Patient Solution?

The Blackbaud Target Analytics team will engage with each Grateful Patient Solution customer to review what is included in the current submission file and determine any needed changes to the file. If your current file does not include sensitive fundraising data elements, then it is likely you may continue to use it.

Why did Blackbaud choose these specific patient data elements for field-level encryption?

These data elements were chosen in correspondence with the Association for Healthcare Philanthropy standards for fundraising under HIPAA.

I am currently sending more than 6 customer-defined attributes. Does this mean I can only send 6? Or can I still send up to 25 custom attributes?

Your organization can continue to send up to 25 customer-defined attributes as part of the Grateful Patient Solution. In addition, you can include up to 6 sensitive fundraising data elements which will be stored in the new Grateful Patient table and encrypted at the field level. Non-sensitive fundraising data elements may be stored within constituent attributes. Please work with your organization's compliance officer in selecting these data elements.

We screen admission files for our rounding program so Outcome usually is not available. Can we replace that field with something that makes sense for our organization?

All fields within Blackbaud products should be utilized as designed.

Are there any limitations to what information we can include in the new Grateful Patient fields or custom attributes, if our compliance officer has “blessed” the ones we are using?

Consistent with our Acceptable Use Policy (AUP), customers may not use our solutions in a manner that violates any applicable laws. As a reminder, per our AUP you are solely responsible for the information and content provided to Blackbaud.

What happens if there is a disagreement between us and Blackbaud regarding what type of patient data is allowable?

To reduce risk to your organization and ours, we strongly encourage you to use the solution in a manner that is consistent with our administrative safeguards, however per our Acceptable Use Policy you are solely responsible for the information and content provided to Blackbaud.

Patients can have multiple visits with different dates, departments, physicians, etc. Will the new Grateful Patient table in ResearchPoint store single or multiple values for a given constituent record?

Sensitive fundraising data elements—those that are encrypted—will allow one per record. All other non-sensitive attributes will allow multiple values per record.

For those of us who have been using the Grateful Patient Solution and had PHI stored in attributes on ResearchPoint records, will the information from those attribute fields be automatically moved to these new encrypted fields?

No, the constituent attributes will not be migrated or moved. Constituent attributes will need to be deleted, as necessary. For more information on how to globally delete constituent attributes in ResearchPoint, please see this [knowledgebase article](#).

What impact does this Grateful Patient Solution enhancement have on ResearchPoint Query and Export functionality?

Until a customer migrates to the enhanced Grateful Patient Solution, there is no change to existing capabilities. The planned security enhancements are complex, and as a result, are happening in multiple stages. For customers migrating before April, the new Grateful Patient encrypted fields are usable for batch and import, on a constituent record, and using Research Lists. After April, all migrated customers will be able to use the encrypted fields using Query and Export functions.

Will the new Grateful Patient fields be available to sync over to Raiser’s Edge/Raiser’s Edge NXT?

The new Grateful Patient encrypted fields **will not** sync over to Raiser’s Edge/Raiser’s Edge NXT. Wealth attributes, predictive model scores, and other custom model scores and ratings fields can sync over to Raiser’s Edge/Raiser’s Edge NXT like they do today.

Are the new Grateful Patient fields and related features available to ResearchPoint customers who do not have Grateful Patient Solution?

Only constituent records that have Grateful Patient Solution data imported will show the fields on the record. Those fields will be hidden by default for all other records.

What other fields are encrypted in ResearchPoint?

To view the fields encrypted in ResearchPoint, please refer to our Knowledgebase (<https://kb.blackbaud.com/articles/Article/193919>).

Are there plans for encrypting more ResearchPoint fields in the future?

Where additional opportunities to deepen encryption exist, enhancements will be available throughout 2021 (updates will be available in our bi-annual product update briefings).

Does Blackbaud plan to deliver encrypted Grateful Patient fields, or other ways to store and encrypt patient information, in Raiser's Edge/Raiser's Edge NXT?

Where additional opportunities to deepen encryption exist, enhancements will be available throughout 2021 (updates will be available in our bi-annual product update briefings).