

CallRail

Checklist

10 tips for keeping PHI safe while marketing



As a healthcare provider, patient privacy is likely one of your top concerns. In March 2024, The U.S. Department of Health & Human Services (“HHS”) updated their guidance for how your practice can stay within the HIPAA regulations, while also reaping the marketing intelligence benefits that tools like CallRail’s Call Tracking provide.

Follow this checklist for best practices on how to stay compliant while still growing your business.

1. Educate your staff

Every employee should know the details of HIPAA and what it takes to maintain compliance. This includes who’s covered, when the obligation to maintain privacy begins (hint: it’s before they’re actually a patient), and the potential consequences if any rules are violated.

2. Only work with vendors that will sign a business associate agreement (BAA)

In March 2024, HHS instructed healthcare providers to only work with tech partners that will sign a [BAA](#) if they want to be safe about their compliance with HIPAA. This agreement allows the tech provider to collect and store patient health information (PHI) on your behalf, and obligates them to take certain steps to support HIPAA compliance.

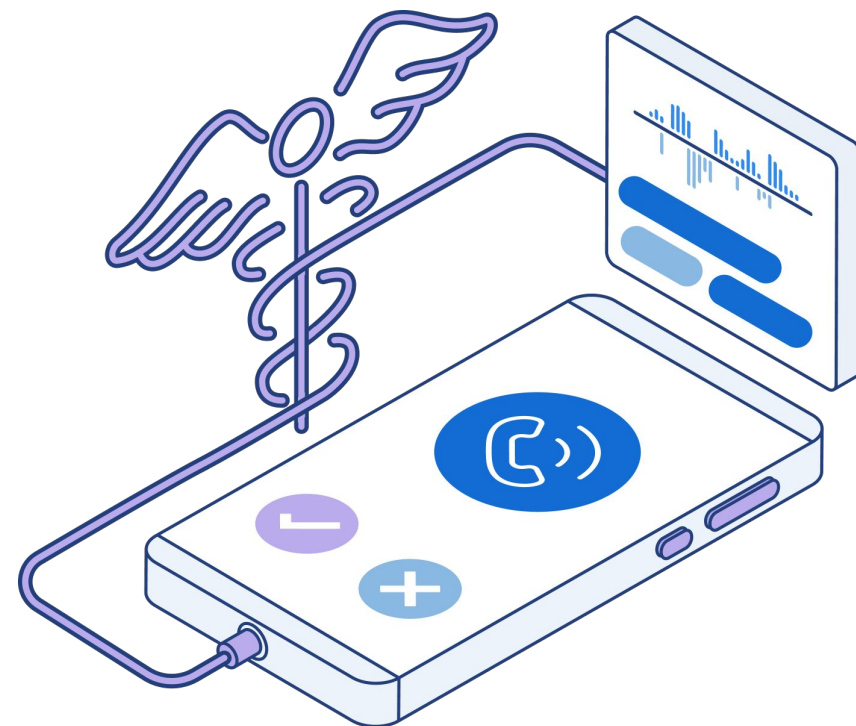


3. Update your CallRail plan to a Healthcare Plan

CallRail always takes security seriously, but our Healthcare Plan is exclusively designed for the unique needs of healthcare providers. It starts with our signing a BAA and offers special security features that support HIPAA compliance, like redacted transcripts, automatic timed log outs, and full audit trail logging.

4. Never share user and log-in credentials

Under HIPAA, patient health information is on a need-to-know basis. CallRail's Healthcare Plans feature unique logins and credentials so that only the staff that needs the information gets the information.



5. Keep detailed records in case of an audit

If you're chosen for a HIPAA audit, your records are your saving grace. Our advanced recordkeeping policies and audit trail logging create an easy roadmap of who has accessed PHI, when, and why.

6. Export data with caution

CallRail ensures that anything within your Healthcare Plan follows HIPAA rules. If you need to export information, use the built-in redaction feature to ensure your compliance. To be completely safe, only export to companies that have a signed BAA in place.

7. Disclose only 'need-to-know' PHI for non-treatment purposes

Unless you're discussing treatment with a fully compliant partner, all PHI should be limited to only the minimum information necessary. Auto redaction can ensure you only share what is absolutely necessary.

8. Check your integrations

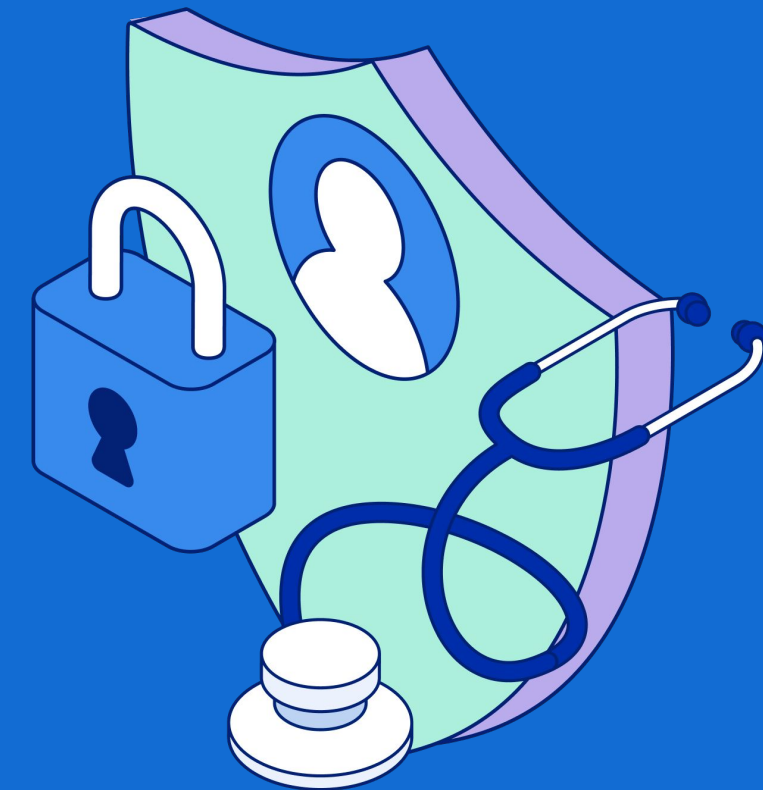
It only takes one non-compliant integration partner to destroy your HIPAA compliance. To keep your patients' privacy safe, check every integration to ensure it supports HIPAA compliance. Better yet, only work with partners that sign a BAA.

9. Plan for human error

No one is perfect, including your staff. That's why CallRail features 30-minute timeouts on all access, keeping PHI safe if someone steps away from their desk. The right partner can help your staff level up their safety adherence.

10. Reap the benefits

CallRail's Healthcare Plans aren't just secure; they're valuable. You can safely use call summaries, transcripts, and call recordings to gain insights into how your team can perform better, what services your patients are looking for, and whether your marketing efforts are successful.



You know the value of call tracking and the insights it brings—now you can leverage that data within the safety of CallRail's Healthcare Plan and feel secure that you are complying with HIPAA.

[Try CallRail's Healthcare Plan free today](#)