

HIPAA Checklist

Source: (2024). HIPAA Check-List [List]. Tija Hunter.

Required Training

	All employees trained to Current HIPAA Standards
	All employees sign Proof-of-HIPAA Training Sheet
	All employees sign Confidentiality/ Non-Disclosure Agreement
	All employees sign employees Technology Use Agreement
	All temporary employees, Volunteer Students sign all of the above
	Re-Train all above if HIPAA laws change or if there are any HIPAA breach incidents during the year
	Unemployment Quarterly Reports listing all employment for the previous two years

Required Facility Protocols

	Update all Windows-based software computer stations to the newest version
	Retire your take-home data backup drives (use trusted encrypted cloud services)
	Get email encryption software for business email accounts
	Convert faxes to email
	Protect texting practices (do not include PHI or use an encryption app for cell phones)
	Computer Screens; keep all HIPAA screens in HIPAA mode, move away from patient viewing, or use privacy screens
	Use only IT Techs that are proficient in HIPAA Omnibus Rule set up for Healthcare Standards
	Use PHI minimally, customize written protocols for your practice, destroy or lock up PHI
	Practice HIPAA breach reporting protocols and situational reactions

Required Documents

	Current HIPAA Manual or Update all written required protocols
	Customize HIPAA Manual on all required facility and training protocols
	List HIPAA officer and HIPAA advisory Committee on written documents (if applicable)
	Have written social media posting protocols/ including a patient release for pictures
	Understand all marketing and product dispensing rules under HIPAA Omnibus Rule
	Update all job descriptions to include current HIPAA-required standards
	Business Associate agreements; signed by appropriate vendors, kept on file
	Independent contractors sign Non-Disclosure agreements, kept on file
	Breach Reporting protocols written and understood by each employee
	Major vs. Minor HIPAA breach is clearly understood, and protocols to report
	Breach Assessment Form; Written and accessible to each employee
	All patients sign an updated HIPAA form (written to current HIPAA law and updated regularly)
	Third-Party Access to records documents updated for all patients regularly
	HIPAA Notice of Privacy Policies displayed in the office and on the practice website
	Medicare, Medicaid, and Healthy Kids programs; use required HIPAA documents and posters
	Annual data backup and contingency report; created and kept on file at least annually by data back-up provider
	HIPAA Risk Assessment Report; created at least annually by HIPAA Officer, kept on file
	Red Flag Rule for fraud prevention; highly recommended to be written protocols