Client communication channel inventory

A practical California working record - editable in Word

USE IT THIS WAY	DO NOT MISTAKE IT FOR THIS
Use before enabling email, text, portal, voicemail, video, forms, or automated reminders.	This does not certify a channel as secure or obtain client consent for a particular use.

Working record

Prepared by	
Reference (no names)	
Date opened	
Next review date	

Six review points

1	**[ ] Inventory channels and owners** Record each system, account owner, vendor, devices, integrations, and backup route. **Your record:** _____ Source: HHS: Security Rule guidance
2	**[ ] Define permitted content** State what may and may not be sent through each channel and how identity is checked. **Your record:** _____ Source: HHS: Privacy Rule guidance
3	**[ ] Map vendor obligations** Record agreement status, settings, retention, subprocessors, and incident terms. **Your record:** _____ Source: HHS: business associates
4	**[ ] Set client expectations** Align consent, response time, emergencies, opt-outs, shared devices, and message retention with actual practice. **Your record:** _____ Source: HHS: Privacy Rule guidance
5	**[ ] Plan misdelivery and outage response** Record containment, alternate contact, escalation, and documentation steps. **Your record:** _____ Source: HHS: Breach Notification Rule

6	**[ ] Test with fictional data** Verify sender identity, notifications, previews, routing, accessibility, and deletion without exposing real client information. **Your record:** _____ Source: HHS: Security Rule guidance

Close the loop

Decision / next action	
Owner	
Due date	

Controlling sources

- HHS: Security Rule guidance
- HHS: Privacy Rule guidance
- HHS: business associates
- HHS: Breach Notification Rule

Educational information only. Not legal, clinical, tax, billing, or regulatory advice. Recheck every source before relying on an older saved copy. Do not put client-identifying information in a copy you cannot secure.