Website and advertising compliance review

A practical California working record - editable in Word

USE IT THIS WAY	DO NOT MISTAKE IT FOR THIS
Use before launch and quarterly across websites, directories, social profiles, ads, and scheduling pages.	This is not approval of advertising, accessibility conformance, trademark use, or clinical claims.

Working record

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

Six review points

1	**[ ] Inventory every public surface** List owned pages, directory profiles, social accounts, ads, booking tools, and cached or delegated profiles. **Your record:** _____ **Source:** BBS: HIPAA, telehealth, advertising, and notices
2	**[ ] Verify names and credentials** Compare titles, license or registration identifiers, business identity, and status with current Board records. **Your record:** _____ **Source:** DCA license lookup
3	**[ ] Review claims and testimonials** Flag guarantees, superiority claims, specialty language, endorsements, and statements unsupported by current evidence. **Your record:** _____ **Source:** BBS: HIPAA, telehealth, advertising, and notices
4	**[ ] Check required notices** Confirm consumer, privacy, cost, contact, and other applicable notices are current and findable. **Your record:** _____ **Source:** BBS: statutes, regulations, and law changes

5	**[ ] Test access and usability** Review keyboard, contrast, labels, text alternatives, mobile layout, and accommodation contact routes. **Your record:** _____ Source: ADA.gov: guidance for businesses

6	**[ ] Create a stale-fact register** Give rates, availability, locations, insurance, credentials, and policies an owner and review date. **Your record:** _____ Source: BBS: HIPAA, telehealth, advertising, and notices

Close the loop

Decision / next action	
Owner	
Due date	

Controlling sources

- BBS: HIPAA, telehealth, advertising, and notices
- DCA license lookup
- BBS: statutes, regulations, and law changes
- ADA.gov: guidance for businesses

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.