The HIPAA compliant email marketing checklist
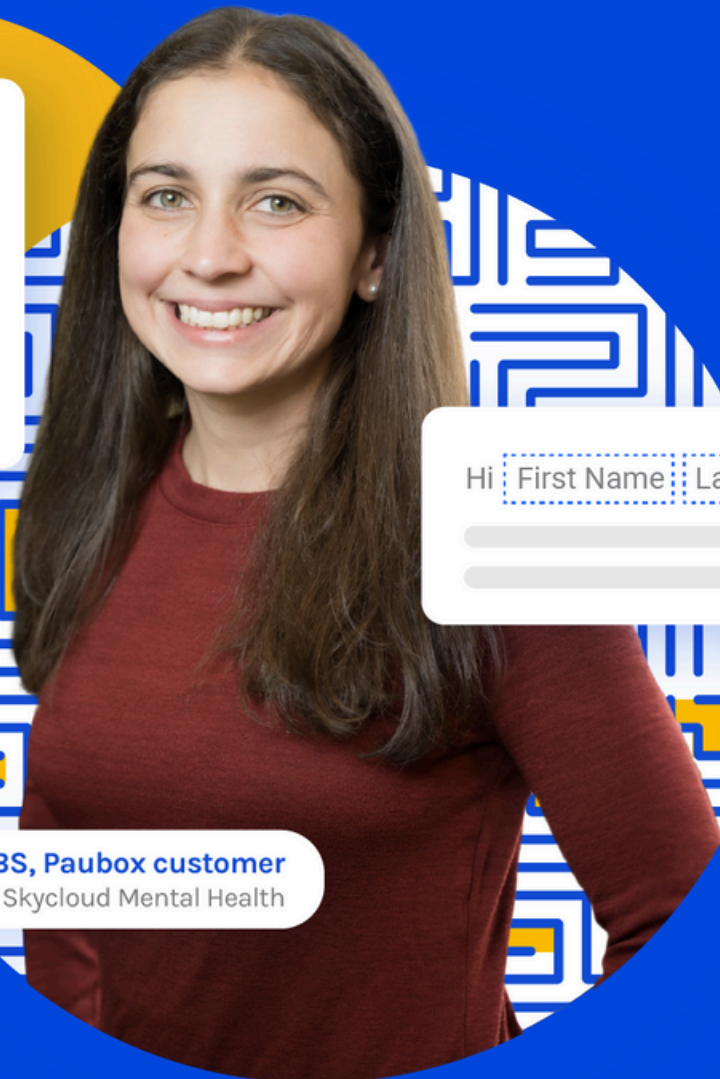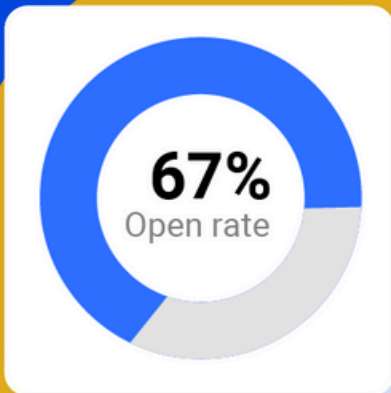
Ensure your organization's email marketing is HIPAA compliant with this simple checklist

67%
Open rate

Hi First Name Last Name ,

MADELINE JACOBS, Paubox customer
Skycloud Mental Health

Obtain patient authorization if needed

- [ ] Determine if patient authorization is required for your email campaign

- [ ] Get and document the authorization where necessary to ensure compliance

> No authorization is needed for emails about services included in a benefits plan

2. Sign a BAA with your email marketing provider

- [ ] Choose a HIPAA compliant provider like Paubox

- [ ] Ensure the business associate agreement (BAA) allows protected health information (PHI) in marketing.

3. Confirm PHI transmission is covered in the BAA

- [ ] Double-check that the BAA covers both the storing and sending of PHI

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4. Use encrypted email marketing solutions

☐ Make sure all emails containing PHI are sent through an encrypted email platform like Paubox Marketing

This protects sensitive information from unauthorized access

5. Limit PHI to what's necessary

☐ Only include the minimum amount of PHI needed to achieve your marketing goals

Avoid including any unnecessary personal health information like specific diagnoses

6. Keep HIPAA policies updated

☐ Regularly review and update your organization's HIPAA policies

☐ Make sure your marketing team is trained on these policies and best practices

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7. Document compliance measures

☐ Keep detailed records of all the compliance measures, decisions, and policies implemented

8. Control access to PHI

☐ Restrict access to PHI to only those team members who need it for the campaign

☐ Monitor who has access and regularly review these permissions

9. Provide opt-out options

☐ Include an easy and clear unsubscribe mechanism in all marketing emails

☐ Promptly process any opt-out requests

10. Maintain an audit trail

☐ Keep records of all email campaigns that include PHI

☐ Track who sent what, when, and to whom, ensuring transparency and accountability

11. Regularly review your email marketing practices

☐ Schedule routine audits of your email campaigns to ensure ongoing HIPAA compliance

12. Securely dispose of unnecessary PHI

☐ When PHI is no longer needed, ensure it is deleted from the email marketing platform

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PAUBOX EMAIL MARKETING

Personalized email marketing, without sacrificing HIPAA compliance

- Keep patients engaged with personalized outreach
- HIPAA compliant
- Free templates and design help

Start for free

TONY COX, Paubox customer
Henderson Behavioral Health