FORTIFAX

The HIPAA Fax Checklist for front desks.

Fourteen habits that keep patient information safe every time your office sends or receives a fax. Print it, post it by the front desk, and go through it with new staff.

BEFORE YOU SEND

Every outgoing fax

HIPAA allows faxing patient information as long as you use reasonable safeguards. These are the ones that prevent the most common mistakes.

01 ☐ **Double-check the fax number**

Most fax breaches are a wrong digit. Read the number back, or pick it from a saved contact instead of typing it.

02 ☐ **Use a cover sheet with a confidentiality notice**

Say who it's for, how many pages, and what to do if it reaches the wrong person.

03 ☐ **Send only what's needed**

The "minimum necessary" rule: send the pages the recipient asked for, not the whole chart.

04 ☐ **Call ahead for sensitive records**

For mental health, HIV, substance use or other sensitive records, confirm someone is waiting at the other end.

05 ☐ **Confirm it was delivered**

Check the delivery report. If it failed, find out why before you send it again.

06 ☐ **Keep saved numbers up to date**

When a referring office or lab changes its fax number, update your contacts that day.

07 ☐ **Know what to do if a fax goes to the wrong place**

Contact the recipient, ask them to destroy it, write down what happened, and tell your privacy officer right away.

WHEN FAXES COME IN

Every incoming fax

08 ☐ **Don't let faxes sit in a tray**

Paper faxes on a shared machine are the easiest way for patient information to be seen by the wrong person.

09 ☐ **Limit who can see incoming faxes**

Only staff who need them should have access, whether that's the machine, the inbox or the portal.

10 ☐ **File it in the patient's chart, then clean up**

Once a fax is in the chart, delete or shred extra copies according to your office's retention policy.

11 ☐ **Protect the inbox faxes arrive in**

Use a strong password and two-step login on the email account that receives your faxes.

12 ☐ **Lock screens when you step away**

A fax open on an unattended screen is the digital version of one left on the machine.

13 ☐ **Have a written fax policy and train on it**

Cover new staff on day one, and review it with everyone once a year.

14 ☐ **Make sure your fax provider will sign a BAA**

Any service that handles your patients' information should sign a Business Associate Agreement with your office.

Faxes that skip the tray entirely

FortiFax delivers every fax to your inbox as a PDF. Talk to a real person in Saginaw.

fortifax.cloud/get-started

This checklist is general guidance to help your office build good habits. It isn't legal advice. Check with your privacy officer or compliance advisor about your office's specific HIPAA obligations.