



Checklist

Review Access, Messaging, Routing, and Vendor Controls

As healthcare practices rely on phone, voicemail, texting, fax, and after-hours workflows to keep daily operations moving, small inconsistencies can quickly turn into larger communication and compliance risks. Use this checklist to review the controls that keep your practice’s communications workflows consistent. This resource helps you assess access, patient communication preferences, workflow ownership, after-hours rules, vendor documentation, and staff training so your communications processes are easier to manage, review, and defend.

Communications Governance Checklist

Run this checklist quarterly, and again any time you add a location, onboard a vendor, or make a staffing change.

Practice name: _____

Date reviewed _____

Location(s) *(optional)*: _____

Reviewed by: _____

Owners

Each workflow needs a single responsible person to ensure changes to routing, scripts, templates, and access do not drift across locations, shifts, or staff turnover.

Call routing and business hours

Owner: _____

Status: OK Needs work Not used

After-hours escalation rules and updates

Owner: _____

Status: OK Needs work Not used

Voicemail access and scripts

Owner: _____

Status: OK Needs work Not used

Fax routing rules

Owner: _____

Status: OK Needs work Not used

Messaging templates/queue ownership

Owner: _____

Status: OK Needs work Not used

User access changes and offboarding

Owner: _____

Status: OK Needs work Not used

Workflows

Use consistent defaults across the team so the same patient scenario gets handled the same way every time.

Call flows are documented and current

Owner: _____

Status: OK Needs work Not used

Voicemail script is standardized

Owner: _____

Status: OK Needs work Not used

Templates for common scenarios

Owner: _____

Status: OK Needs work Not used

Fax routing rules are written down

Owner: _____

Status: OK Needs work Not used

After-hours rules are written down

Owner: _____

Status: OK Needs work Not used

Exceptions documented and approved

Owner: _____

Status: OK Needs work Not used

Access and offboarding

If you cannot remove access the same day or review who has access without guessing, you do not have a controlled communications workflow.

Voicemail access is role-based

Owner: _____

Status: OK Needs work Not used

Message access is role-based

Owner: _____

Status: OK Needs work Not used

Fax access is role-based

Owner: _____

Status: OK Needs work Not used

Same-day access removal

Owner: _____

Status: OK Needs work Not used

Admin access by role

Owner: _____

Status: OK Needs work Not used

Vendor credentials are not shared

Owner: _____

Status: OK Needs work Not used

Patient messaging preferences

Keep texting and email practical while honoring patient requests. Routine messages stay neutral. Exceptions get documented.

Patient preferences recorded

Owner: _____

Status: OK Needs work Not used

Preferences visible to staff

Owner: _____

Status: OK Needs work Not used

Preferences visible in workflow

Owner: _____

Status: OK Needs work Not used

Exception path for requests

Owner: _____

Status: OK Needs work Not used

Templates and training

Templates reduce improvisation. Training should show staff what to do on a busy day, not just how the product works.

Reminder/confirmation templates

Owner: _____

Status: OK Needs work Not used

Reschedule/missed call templates

Owner: _____

Status: OK Needs work Not used

Billing callback templates

Owner: _____

Status: OK Needs work Not used

Document request templates

Owner: _____

Status: OK Needs work Not used

Approved neutral voicemail scripts

Owner: _____

Status: OK Needs work Not used

New staff follow documented workflows

Owner: _____

Status: OK Needs work Not used

After-hours escalation rules trained/ accessible

Owner: _____

Status: OK Needs work Not used

Vendor file

This section helps you confirm which vendors touch PHI, which BAAs are on file, and what documentation has been updated.

Vendor inventory current

Owner: _____

Status: OK Needs work Not used

BAAs stored in one place

Owner: _____

Status: OK Needs work Not used

BAA covers specific data types (voicemail, fax, messages, recordings, logs)

Owner: _____

Status: OK Needs work Not used

BAA addresses subcontractors, incident reporting, and data retention

Owner: _____

Status: OK Needs work Not used

Access review notes are saved

Owner: _____

Status: OK Needs work Not used

Training logs and job aids saved

Owner: _____

Status: OK Needs work Not used

Subcontractors documented when relevant

Owner: _____

Status: OK Needs work Not used



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