

Incident Response Flowchart



Print and use this checklist during training or incidents.



Owner

OWNER: _____

The person accountable for completing that step during an incident.
In many mid-sized practices, one person may own multiple steps.



Detect

- ☐ **Confirm what is failing:**
calls, voicemail, text, fax, routing
- ☐ **Record the time** first noticed
and who reported it:

Date: _____ **Time:** _____

Reported by: _____



Preserve (Before Changes)

- ☐ **Export** admin login history
- ☐ **Capture** routing/config change history
- ☐ **Pull call detail records** for the incident window
- ☐ **Save voicemail access records** if available
- ☐ **Save fax send/receive logs** and portal access logs
- ☐ **Save messaging access logs** and export activity
- ☐ **Save vendor ticket/support** communication history



Decision A:

Is Patient Access Impacted Right Now?

If yes, complete **Continue Care** now. If no, proceed to **Contain**.

YES

Continue Care (Only If Access Is Impacted)

- ☐ **Enable backup routing** or answering coverage
- ☐ **Update voicemail greeting** with a brief
explanation and alternate contact
- ☐ **Post a website notice** with an alternate
contact method
- ☐ **Use the approved** internal coordination method

NO

Contain

- ☐ **Disable** compromised accounts
- ☐ **Rotate** admin credentials
- ☐ **Pause** outbound messaging if needed
- ☐ **Simplify** routing temporarily

Continue to Decision B →



Decision B: Is PHI likely involved?

If yes, complete **Assess**. If no, skip to **Document**.

YES

Assess (Only If PHI Likely Involved)

- ☐ **Complete** the four-factor breach risk assessment
 - Nature and extent of PHI involved
 - An unauthorized person who used or received PHI
 - Whether PHI was actually acquired or viewed
 - The extent to which risk has been mitigated
- ☐ **Document** the evidence that supports your conclusion

NO

Continue to Next Step



Document

- ☐ **Finalize** the timeline
- ☐ **List evidence** reviewed
- ☐ **Summarize the decision** and rationale
- ☐ **Record** corrective actions



Improve

- ☐ **Hold a short post-incident review** and assign corrective actions
- ☐ **Update policy** or training
- ☐ **Adjust** access controls
- ☐ **Update routing** or templates
- ☐ **Set a log review cadence** and owner



Book a Demo

See how RingRx can support incident-ready phone, fax, texting, routing, and audit-log workflows. Book a demo or call 888-980-6860.

