



iDialogue HIPAA Guidelines

Admin Guide

Last Updated July 2020

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Overview

This document provides guidance on how to implement iDialogue document solutions in compliance with HIPAA, or The Health Insurance Portability and Accountability Act (HIPAA).

The document primarily discusses best practices for protecting PHI (Patient Health Information) when generating documents and collecting eSignatures

Patient Health Information (PHI)

iDialogue documents are generated from payloads of data referred to as FrontMatter. This FrontMatter may contain personally identifiable or health information. The FrontMatter exists within iDialogue's API memory for only the amount of time to process and merge the document. No PHI is served on iDialogue servers.

The resulting generated document containing PHI may be attached to a Salesforce record (parentId), where standard sharing rules and precautions should be taken to ensure rule of least privilege is assigned to the records.

If the document is to be eSigned, it may be stored on iDialogue's servers for use in secure eSignature. The documents are stored encrypted on a HIPAA compliant Amazon AWS S3 storage partition.

Secure Rooms

All online interactions and transactions occur within a secure container referred to as a "room". Rooms may contain documents and content specific to a transaction, such as an eSignature, approval, or payment process.

Rooms are hosted using an encrypted HTTPS / TLS connection and hosted within a secure AWS data center.

Email invitation links to rooms generate secure tokens that are unique to a recipient and room.

Two Step Verification

To verify the identity of contacts accessing iDialogue rooms, two-step verification may be enabled. This requires each recipient to have a valid email address *and* mobile number that can receive a 5 digit code via SMS/Text.

Upon clicking their email invitation link, visitors to two-step verification enabled rooms are sent a text message to access the room.



Builder



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Security



Enforce Two-Step Verification ⓘ

Save

eSignatures

Room members may be designated a role, such as “Signer 1”, “Signer 2”, etc... Documents in the room requiring eSignature are available for review and signature on both desktop and mobile devices.

The eSignature experience is embedded within the room. There is no download or printing required.

Both free form “draw” and adopted signatures are supported. The adopted signature feature may be disabled in room settings -> eSignatures.



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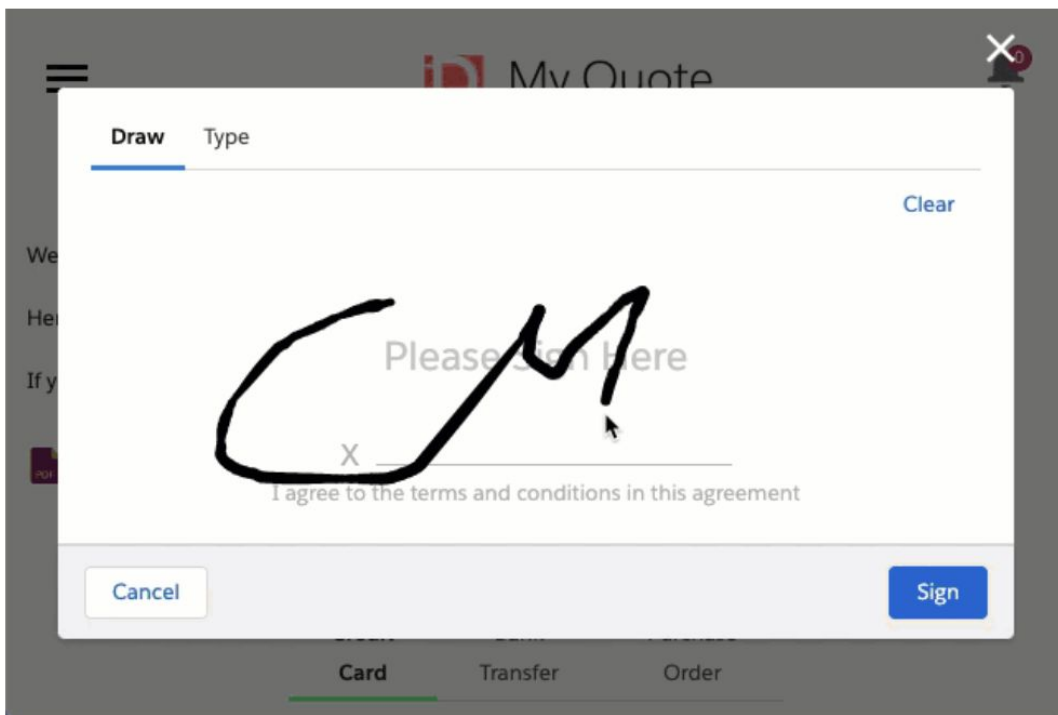
Security

eSignatures

☒ Enable free form signatures ⓘ

☐ Enable adopted signatures (Cursive Fonts) ⓘ

Save



Signed documents are time stamped and securely archived as attachments in the system record of origin.



PRESCRIPTION

Physician: John Smith MD
525 S. Lexington Ave
Burlington, NC 27215

Rx Date: 07-07-2020
Rx Number: Prescription-00001001

Patient Name: Andy Young
Patient DOB: 12-10-1970

Prepared by: Health Cloud Care Providers
Pharmacist: Elaine Leung
123 SW Oak
Somecity, CA 12345

Drug Name	Strength	Quantity	Route	Frequency	Refill
Amoxicillin	250 mg tablets	14.0	Oral	t.i.d x 7 days	1.0
Lipitor	10 mg tablets	50.0	Oral	Once a day	3.0

Physician

John Smith MD

Signature

Timestamp

2020-07-07T17:54:26.145Z

Example of generated document with eSignature and timestamp.

Audit Trail

An audit trail of all room activity is recorded and accessible using the iDialogue Rooms Lightning component on any page layout. Every event, from document generation to execution is logged and made available to Administrators. Logged events include document generation, invitation, email opened, room viewed, document viewed, document signed.

References

What is the HIPAA Electronic Signature Rule?

<https://www.calhipaa.com/hipaa-electronic-signature-rule>