

The CallTrackingMetrics HIPAA Guide

Staying Relevant & Compliant in Healthcare Marketing



Introduction

Digital advertising spend in the healthcare industry has exploded over the past decade, and it shows no signs of slowing down.



By the end of 2024, the healthcare and pharmaceutical industry's digital advertising spend in the US will reach \$19.66 billion. This number is an astonishing \$1.4 billion jump from 10 years ago. Nearly 50% of U.S. healthcare companies' marketing budget is dedicated to paid digital advertisements; social media; content marketing; TV and video; and more.

Your own budget needs to somehow compete with that large volume of advertising dollars. Pinpointing which ads drive customer and patient interactions—including phone calls, form fills, chats, and texts—is often the crux of a healthcare organization's success and visibility. Each interaction is key to your prospective patient experience, whether online, offline, or in the office. Remember, though, in healthcare, calls are still king. The majority of prospective patients are more likely to pick up the phone and make an appointment after finishing their online research than fill out a form.

Tracking those conversations, no matter where they occur, (and leveraging that information for better marketing and business outcomes) requires engaging widely with new technologies. Healthcare providers, however, must do so carefully; regulations surrounding the privacy of healthcare information leave no room for error. In particular, the Health Insurance Portability and Accountability Act (HIPAA) significantly constrains how the healthcare sector can handle its data—and noncompliance is not an option.

Today, marketing insight and personalization through a HIPAA-compliant call tracking solution can impact a healthcare provider's success by driving vendor deals, increasing visibility with prospective patients, and connecting them to the care they need, all while protecting their privacy and data.

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INTRODUCTION

Healthcare Marketing is Hard!

Marketing today isn't easy, but healthcare marketing is extra tough for a lot of reasons (not to mention the stakes are higher than, say, marketing water bottles or tortilla chips).

So, what are the biggest obstacles healthcare organizations face in marketing?

1.

Costs

Healthcare providers have to stretch and optimize their marketing budget across a mix of ads to stay relevant, including video and TV, PPC (think Facebook and Google), social media, print, and more. With so much ground to cover, a comprehensive marketing strategy can be very costly. The average healthcare marketing budget in 2023 is \$7.6 million. Of course, that number can vary wildly from small healthcare practices with modest advertising budgets to pharma and biotech giants. No matter what size or healthcare niche your organization is, marketing is a significant budget item.

2.

Hitting goals while staying compliant

Unlike other marketers, whose creative work rarely needs a legal team's review before going live, healthcare marketers face huge constraints in their advertising. Caught between a mixture of federal laws and state regulations, creating, publishing, and managing compelling, legally-compliant advertising campaigns is no small feat. Despite these hurdles, healthcare marketers are still expected to meet their organization's goals for intake numbers, profit, and/or brand recognition.

3.

Hitting goals without increasing the budget

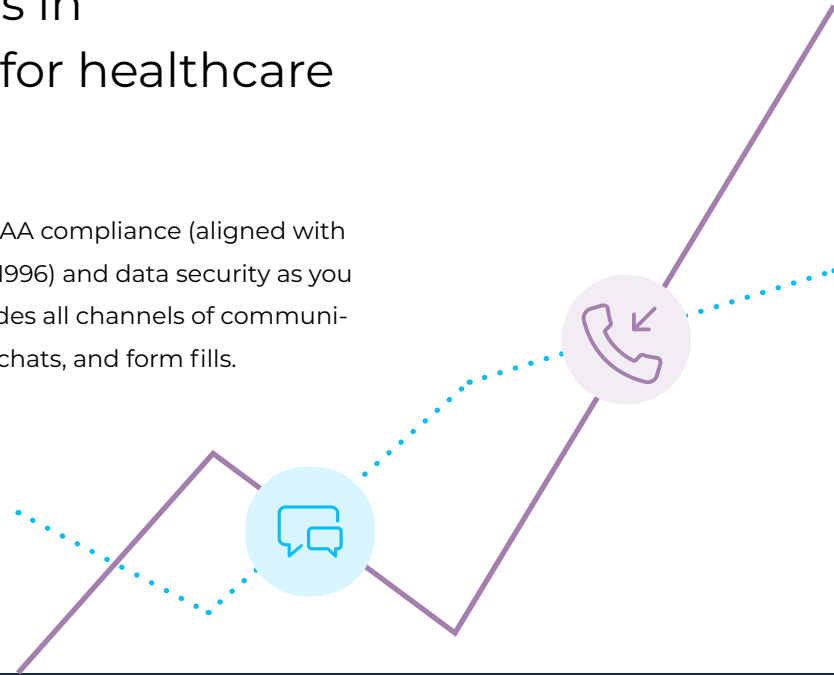
Rising advertising costs don't, unfortunately, mean bigger budgets from your boss. You need to be able to create, place, publish, and monitor campaigns without asking to hire more people or purchase pricey softwares, because that's not going to happen when times are lean. The popular refrain in marketing to "do more with less" can feel like cold comfort when the stakes are high.

But we've got you. So take a breath, refill your coffee, and discover how CallTrackingMetrics can help you improve your marketing performance while staying compliant.

Securely Connecting with Customers and Patients

Every year data security grows in importance—and complexity—for healthcare providers in every sector.

Ensuring that your tools and partners are as in-tune to HIPAA compliance (aligned with the Health Insurance Portability and Accountability Act of 1996) and data security as you are is non-negotiable in the healthcare industry. This includes all channels of communication including calls and call recordings, text campaigns, chats, and form fills.



Obligatory Explanation of HIPAA (Already an expert? Skip ahead to Part One)

HIPAA is built on two legs: privacy and security. For privacy, HIPAA establishes national standards which are applied to insurance plans and healthcare providers to protect medical records and Protected Health information (PHI). It requires safeguards to protect patient information and restrict access to patient records without patient authorization. Patients, however, have the right to access their health records at any time and request corrections within it.

For security, HIPAA demands administrative, technical, and physical safeguards to maintain PHI's confidentiality, integrity, and security. With today's emphasis on [data-driven marketing](#), healthcare marketers are at a disadvantage if they don't have HIPAA-compliant software for their work.

PART 1

Call Tracking's Value to Healthcare Providers

Features for Data-Driven Healthcare Marketers

CTM is a robust suite of tools designed to help organizations fine-tune their marketing campaigns, sales performance, and entire customer journey. We provide flexible functionality and turnkey integrations to make every dollar you spend on marketing go further, and empower your team to hit goals even when faced by regulatory and budgetary roadblocks.

Actionable Attribution

You're spending a lot of time and budget on your marketing. Wouldn't it be nice to go beyond traditional web analytics to know which conversations were driven by your efforts? That's the heart of CTM. When you have a conversation with your prospective and current patients, you can instantly see which campaigns ads, keywords, and URLs convinced them to make contact.

How is that actionable? Here's what you can do with that real-time data:

- **Reallocate spend** to your highest performing campaigns
- **Send conversion events** back to Google Analytics and Google Ads for automated optimization
- **Personalize additional follow ups** for a smoother experience

Advanced Routing

Someone is calling about their health? You better get them to the right team, quickly. With the detailed source data, and complex routing features of CallTrackingMetrics, you can direct incoming calls to the best possible agent based on the caller's likely needs. You can route calls based on agent expertise, the caller's geographic location, the ad channel they're calling from, and their history of communication with your organization.

Set your team up for success, and your patients up for a smooth experience with:

- **IVRs** to collect additional details to route to the best resource and reduce the need for transfer
- **Queues** to segment your team for efficient routing and reduced missed calls
- **Automated follow ups** for missed calls to minimize wait times
- **Omnichannel routing** to connect your team with conversations, wherever they're happening

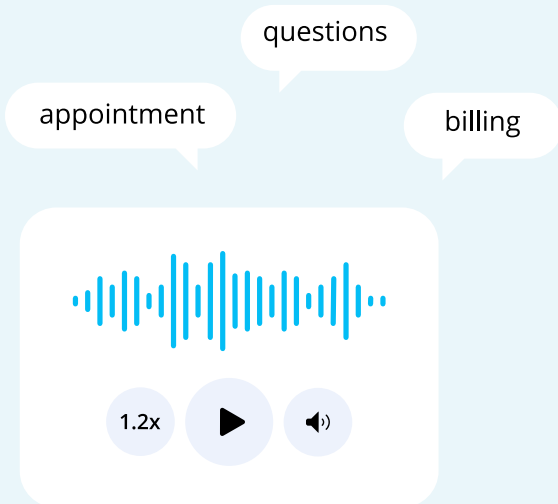
Conversation Intelligence

So your phones are ringing steadily, none of your agents have called out sick, and you're feeling pretty good about things. Then you hop online to see if there's any new reviews of your organization, and see three one-star reviews – right at the top! What's going on? Well, the phones may be ringing, but that doesn't mean that calls are going well.

That's where conversation intelligence tools come in.

Conversation intelligence refers to the ability to identify and react to signals in communications. Basically, it gives you all the details on how a call went so you can identify ways to improve.

Conversation intelligence tools can tell you why folks call, what they need or want, how your team handles customers, and if callers leave satisfied. Capturing this data can transform the way you make decisions, train your team, and create marketing materials.



Here are some of the most impactful conversation intelligence tools you can use for customer insights:

- **Call recordings** to relisten to conversations exactly as they happened, tone and all
- **Transcriptions** to review and share who said what and how the call was handled
- **Call scoring** to categorize and understand call quality and team performance
- **AI** to save time and boost insights by automating routine tasks and instantly summarizing and analyzing calls

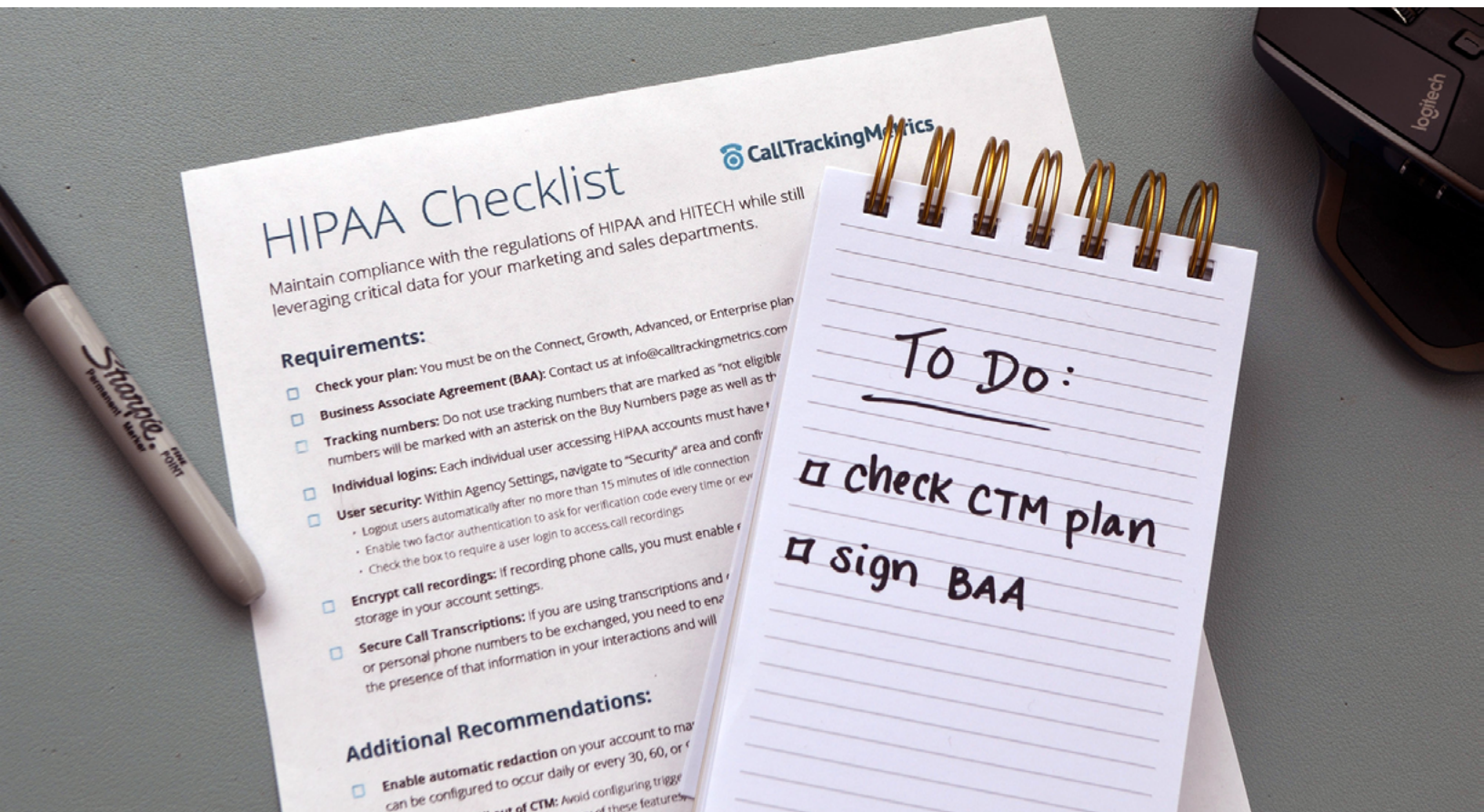
PART 2

A Security-Focused Solution

It would be very weird of us to describe the benefits of call tracking above, only to announce how none of it meets HIPAA compliance.

The good news is we've designed our software to adhere to strict security and privacy standards so you don't have to fight with your legal team to use the first-party data you crave.

We know that in the healthcare industry, patient confidentiality and security is just as essential to your success as the marketing campaigns you run. That's why we've built our tools with options and flexibility to meet the standards of HIPAA, GDPR, CCPA, and a number of additional acronyms, while still providing critical insights to improve performance, lower costs, and increase marketing ROI.



HIPAA Checklist

Maintain compliance with the regulations of HIPAA and HITECH while still leveraging critical data for your marketing and sales departments.

Requirements:

- Check your plan:** You must be on the Connect, Growth, Advanced, or Enterprise plan
- Business Associate Agreement (BAA):** Contact us at info@calltrackingmetrics.com
- Tracking numbers:** Do not use tracking numbers that are marked as "not eligible" numbers will be marked with an asterisk on the Buy Numbers page as well as the numbers will be marked with an asterisk on the Buy Numbers page as well as the
- Individual logins:** Each individual user accessing HIPAA accounts must have:
- User security:** Within Agency Settings, navigate to "Security" area and configure:
 - Logout users automatically after no more than 15 minutes of idle connection
 - Enable two factor authentication to ask for verification code every time or every
 - Check the box to require a user login to access call recordings
- Encrypt call recordings:** If recording phone calls, you must enable encryption storage in your account settings.
- Secure Call Transcriptions:** If you are using transcriptions and recordings or personal phone numbers to be exchanged, you need to ensure the presence of that information in your interactions and will

Additional Recommendations:

- Enable automatic redaction** on your account to maximize privacy. This can be configured to occur daily or every 30, 60, or 90 minutes.
- Turn off CTM:** Avoid configuring triggers that are not part of CTM. Avoid configuring triggers that are not part of these features.

CallTrackingMetrics HIPAA at a Glance

Security Features

CTM's security features allow healthcare providers to use call tracking software while remaining HIPAA-compliant. Protecting you and your customers' information is one of our top priorities.

Some key steps in remaining HIPAA compliant with CTM include:

- Being on a HIPAA compliant plan (Connect, Growth, Advanced, or Enterprise)**
- Obtaining a Business Associate Agreement (BAA)**
- Purchasing tracking numbers that are eligible for HIPAA compliance**
- Setting up unique account logins for everyone accessing HIPAA accounts**
- Configuring automatic logouts, 2FA, and call recording access**
- Encrypting call recordings**
- Securing call transcriptions**

Take a look at our current list of HIPAA-compliant security measures to see the specific ways we safeguard your data.



PRO TIP

Our full [HIPAA checklist](#) is a great tool to help marketing and sales departments take every step necessary for full safety and compliance.



Secure Communications

We want to make sure all communication channels are available to your teams, without worrying about which ones are secure and compliant. That's why our commitment to compliance goes beyond traditional phone conversations. CTM's SMS, chat, and form fill features are HIPAA compliant, so healthcare providers and organizations can communicate easily and securely whenever needed, without compromising privacy.



Encrypted Data at Rest and in Transit

All PHI transcriptions must be encrypted to meet HIPAA requirements. We keep data secure by encrypting our entire call tracking platform using Transport Layer Security (TLS). Data can be at risk even while at rest, so HIPAA requires stored data be encrypted as well. We use encrypted volumes to safely store:

- Call recordings
- Transcriptions
- Log files
- Account notifications
- and more to protect PHI.



Secure Access to Call Data

In CTM, each individual customer has a unique login to access the platform. All CTM plans support an unlimited number of users and account owners have the power to determine each user's access level. Additional security measures, such as automatic timeouts, can be turned on at any time.

Administrators can also restrict which call data fields each user group can view. This ensures that PHI is only accessible to a user when it's critical to their job function.

As an added security measure, every agency administrator in CTM logs in using two-factor authentication (2FA). Each login asks for both standard login credentials and a verification code, provided via SMS or a one-time password generator. Google found that using SMS verification with 2FA blocked 100% of spam bots and the majority of targeted and bulk phishing attacks.



Detailed Logging

Anytime PHI call data is accessed or modified, that event is logged in the CTM platform by user, IP address, and timestamp. Each user's unique login credentials associate them directly to their activity within accounts containing secure information and PHI. Even every call recording playback is logged so that administrators know when a call has been reviewed.

A Culture of Commitment to Security

Thousands of companies around the world rely on CTM's cloud communications platform to exchange millions of calls and messages. We take that trust in our system seriously. Our services follow the latest security best practices and comply with strict privacy regulations and corporate policies. One of the clearest ways we do this is through Systems and Organizations Controls (SOC2) compliance.

What is SOC2 and Why Does it Matter?

CTM is a SOC2-compliant software provider, which means that we recertify every 12 months by meeting rigorous industry standards of data protection as set by the AICPA.

In conjunction with HIPAA compliance, a SOC2 certification means that a SaaS provider actively secures Protected Health Information (PHI) in communications and in the cloud. Paired with CTM's HIPAA compliance, our data protection and information security is truly comprehensive.

So how does our SOC2 and HIPAA compliance show up in your everyday use of CTM? If you work in the healthcare industry, you'll see automatic redaction of PHI and personally-identifiable information in call records, transcriptions, texts, forms, and more.



Protecting while Promoting

Businesses need to market and promote themselves to grow, and healthcare providers are no exception.

CTM gives providers the best of both worlds: cutting-edge technology with the ability to track all marketing channels, improve sales, and provide better customer service while staying secure and compliant. Managing both of these crucial functions with a single tool can significantly impact business performance, efficiency, and the ease with which you protect the privacy and security of your patients.

As part of our HIPAA Compliance Program, CallTrackingMetrics enters Business Associate Agreements (BAA's) with customers to document the requirements of the relationship as it relates to HIPAA.

Read our [Security Overview](#) for further details on how we value and maintain customer data security.



Contact us today to learn about CallTrackingMetrics' HIPAA compliance program.

[Book a Demo](#)

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