

STUDENT SAFETY & HIPAA COMPLIANCE CHECKLIST

Operational Risk Management, HIPAA Privacy & Onboarding Safeguards for Academic Partnerships

Purpose: Long-term care facilities (skilled nursing, assisted living, memory care) can safely scale their communications capacity through university service-learning partnerships while maintaining compliance with HIPAA privacy rules, state background screening, and resident dignity standards. This checklist provides Directors, Administrators, and Risk Managers with a standardized onboarding roadmap.

Phase 1: Pre-Onboarding Screening & Background Checks

- 1) **State Registry & Background Clearances:** Cross-check all participating student names against state healthcare and criminal registries prior to facility site visits or project launch.
- 2) **Academic Enrollment Verification:** Confirm active enrollment in a credit-bearing course through the university service-learning office or course faculty.
- 3) **Orientation & Rules Briefing:** Ensure all student teams complete an orientation covering facility safety rules, emergency protocols, and age-appropriate resident engagement guidelines.

Phase 2: HIPAA Compliance & Data Privacy Safeguards

- 1) **Mandatory Non-Disclosure Agreement (NDA):** Require every participating student and faculty advisor to sign a facility-approved HIPAA confidentiality agreement before receiving internal project briefs or client data.
- 2) **Non-Clinical Boundaries:** Strictly prohibit student access to Electronic Health Records (EHR), clinical chart notes, or private resident medical histories. Projects should remain strictly non-clinical (marketing, PR, web copy, social media).
- 3) **Secure Data Handling:** Prohibit storing unencrypted resident information on personal student devices. Transfer draft materials via secure, encrypted university cloud storage.

Phase 3: Resident Media Releases & Storytelling Protocols

- 1) **Signed Photo & Media Releases:** Secure signed resident (or authorized Family/POA) photo/video consent forms before capturing any photography, audio, video, or quoted testimonials.
- 2) **Visual Opt-Out Identification:** Implement clear visual tags or notification protocols identifying residents who have opted out of media participation during student site visits.
- 3) **Pre-Release Content Approval:** Establish a strict rule that no marketing assets (social media posts, flyers, newsletters, website copy) may be published without prior written approval from the designated facility lead.

Phase 4: On-Site Supervision & Workflow Coordination

- 1) **Designated Facility Lead:** Assign a single facility coordinator (e.g., Marketing Director, Volunteer Coordinator, or Administrator) for periodic student team check-ins.
- 2) **Common Area Escorts:** Ensure facility staff accompany student teams capturing photography or conducting interviews in common areas.
- 3) **Incident Reporting Protocol:** Brief students on the immediate reporting process for any accidental rule infraction, resident distress, or safety concern during site visits.

Operational Risk & Compliance Audit Checklist

Status	Compliance Milestone & Action Item	Responsible Party	Completion Target
[]	Background Clearances: Cross-check student roster against state registries	HR	2 Weeks Pre-Launch
[]	HIPAA NDA Execution: Collect signed confidentiality agreements from all students	Risk Manager / Lead	1 Week Pre-Launch
[]	Non-Clinical Boundary Briefing: Confirm project scope excludes EHR/clinical access	Faculty	Day 1 Orientation
[]	Resident Media Releases: Verify signed consent forms for featured residents	Activities Lead / Lead	Prior to Media Capture
[]	Visual Opt-Out Identification: Flag opt-out residents for student visits	Activities / Nursing	Day of Site Visit
[]	Designated Coordinator Assigned: Set up bi-weekly 15-min Zoom check-ins	Facility Lead	Week 1
[]	Secure Data Protocol: Set up encrypted cloud folder for project deliverables	Faculty / Mktg Lead	Week 1
[]	Pre-Release Approval Workflow: Establish written sign-off protocol for student assets	Facility Lead	Ongoing
[]	Final Milestone Review: Evaluate completed deliverables & debrief with faculty	Administrator / Lead	Final Week

Proven Practice: Low Client Strain & Locked-Down Compliance

In WSU strategic communication partnerships with Pullman Regional Hospital and Whitman County Public Health, structured student onboarding and remote check-ins allowed healthcare leaders to gain 60+ customized marketing assets and +22% web engagement with zero HIPAA infractions and minimal staff strain (e.g., only 6 hours total client time across 15 weeks).

Facility Onboarding Sign-Off & Emergency Contact

Facility Name: _____

Date: _____

Designated Lead: _____

Title: _____

Lead Phone / Email: _____

Sign-off: _____

University Partner: _____

Course: _____

Note: Keep a copy of this signed checklist in your facility risk management file alongside student NDA forms and resident media releases

Presenter & Facilitator Contact Information:

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