



Practice Management **Bridge**®

BRIDGE COMPLIANCE

HIPAA/OSHA Onboarding Checklist

Welcome to Rectangle Health!

We're excited to help you get started with **Bridge™ Compliance** within our **Practice Management Bridge®** software.

Please use this guide to help you complete your HIPAA and/or OSHA requirements within your first 90 days using the platform.



**This guide does not qualify as legal advice. Successfully completing the checklists does not certify that you or your organization are compliant. If you have any questions, please contact our Care team at 800-337-3630.*

Resources and Support

Log-In



<https://pmb-web.officesafe.com/compliance/login>

Need Additional Support? Contact Us!



Bridge Compliance Help Center

[View now](#)

Available 24/7

Self-service



Care Team:

800-337-3630, option 3

care@rectanglehealth.com

Available 9am - 5pm EST

IMPORTANT

Failing to meet HIPAA and/or OSHA requirements can put your practice at risk for audits and costly fines.

- **HIPAA** requirements applies to all healthcare organizations, regardless of size.
- **OSHA** requirements apply only to practices or personnel who handle hazardous materials.
 - *Additional requirements may vary by state or location.

Master Class

Learn what healthcare compliance means, the basics of HIPAA and OSHA, and what's expected in practice.

[Watch now](#)

“The way we used to do compliance was nothing like we do now. Bridge™ Compliance has helped me be better for our team’s health and safety.”

– Chief Operating Officer, Little Rock Family Dentistry

FIRST 30 DAYS Key Compliance Steps

Log In: <https://pmb-web.officesafe.com/compliance/login>

Complete these essential compliance steps within your first 30 days to set a strong foundation.

Note: OSHA requirements only apply if your practice is subject to them. You'll only see and be able to complete the OSHA items in this checklist if your organization has the OSHA module enabled in Bridge Compliance

Staff Setup

Designate a Privacy & Security Officer

The HIPAA Privacy Officer is responsible for keeping all information private, signed, and stored properly. The Security Officer determines what can be done with the information (how and what can be shared.) These roles can be filled by one person or by two different people.

Tour: [How to designate HIPAA Privacy Officer and Security Officer](#)

Time to complete: 5 minutes

Create individual user accounts for all staff

Each member of your staff needs an account to access their training and your practice's policies.

Tour: [How to add users, assign roles \(Admin or Member\), and resend invite emails](#)

Time to complete: 5 - 30 minutes (depending on the number of users)

Risk & Safety

Complete an Annual HIPAA Risk Assessment for your practice

A HIPAA Risk Assessment must be completed or updated annually.

Tour: [How to complete the HIPAA Risk Assessment](#)

Time to complete: 45 - 60 minutes

Take an OSHA Self-Assessment (if applicable)

This assessment includes every OSHA requirement. Check off the boxes for the items that you are currently doing in your office to measure whether you would be prepared for an OSHA audit.

Tour: [How to complete the OSHA Self-Assessment](#)

Time to complete: 10 - 15 minutes

FIRST 30 DAYS Key Compliance Steps

Log In: <https://pmb-web.officesafe.com/compliance/login>

Complete these essential compliance steps within your first 30 days to set a strong foundation.

Note: OSHA requirements only apply if your practice is subject to them. You'll only see and be able to complete the OSHA items in this checklist if your organization has the OSHA module enabled in Bridge Compliance

Training & Certification

Complete your HIPAA Officer Certification

As the HIPAA Officer, you must complete your own training and acknowledgements.

Tour: [How to take and monitor training courses](#)

Time to complete: 2 hours

Ensure all staff complete HIPAA training and acknowledgement

Team members must pass 3 HIPAA quizzes.

Tour: [How to take and monitor training courses](#)

Time to complete: 1 hour (for staff)

Ensure all staff complete OSHA training and acknowledgements (if applicable)

Team members must complete 3 courses: Bloodborne Pathogens, Hazard Communication, and Infection Control.

Note: Dental practices in California must take the on-demand California Infection Control training within Continuing Education instead of the Infection Control course within OSHA Training.

Tour: [How to take and monitor training courses](#)

Time to complete: 4 hours (for staff)

Vendor Compliance

Obtain signed Business Associate Agreements (BAAs) from all applicable contractors/vendors.

BAAs establish a legally-binding relationship between your practice and business associates to ensure complete protection of Patient Health Information (PHI).

Tour: [How to create, upload and send BAAs](#)

Time to complete: 5 - 40 minutes

FIRST 60 DAYS Key Compliance Steps

Log In: <https://pmb-web.officesafe.com/compliance/login>

Complete these essential compliance steps within your first 30 days to set a strong foundation.

Note: OSHA requirements only apply if your practice is subject to them. You'll only see and be able to complete the OSHA items in this checklist if your organization has the OSHA module enabled in Bridge Compliance

Response Plans

Create an Emergency and Incident Response Plan

This plan documents who is on the Emergency Team, who is responsible for data backup, what your key processes are in the event of an emergency, and more.

Tour: [How to complete the HIPAA Emergency and Incident Response Plan](#)

Time to complete: 15 - 20 minutes

Complete the OSHA Plans (if applicable)

The Bloodborne Pathogen and Hazard Communication plans are required. These plans are in Q&A format; if a question is not applicable, enter N/A.

Tour: [How to complete OSHA Response Plans](#)

Time to complete: 30 - 45 minutes

Complete a Safety Data Sheet (SDS) eBinder

Create a digital binder by searching for the safety data sheets of hazardous chemicals in your office.

Tour: [How to create a Safety Data Sheet eBinder](#)

Time to complete: *Varies depending on the number of products you add to your eBinder*

FIRST 90 DAYS Review Routine Maintenance Steps

Log In: <https://pmb-web.officesafe.com/compliance/login>

Review routine maintenance requirements within your first 90 days to ensure you're clear on your responsibilities.

At this stage, all of your requirements within this checklist should be completed to help ensure your practice is protected.

Routine Maintenance:

Employee management

Regularly update records for new hires, terminations, and role changes.

New Hire Training

Ensure all new employees complete HIPAA and/or OSHA training.

Vendor Management

Maintain up-to-date Business Associate Agreements for all service providers, software, and IT changes.

Safety Data Sheet (SDS) Management

Add and remove items from your SDS ebinder, as needed, using the Safety Data Sheets Database.

Incident Response

Address compliance incidents, including but not limited to recent HIPAA breaches, employee injuries, and other related issues, in accordance with established plans and policies.

The Bridge™ Compliance Advantage

Trusted by over 5,000 healthcare practices nationwide, Bridge™ Compliance allows you to effortlessly maintain effective and scalable HIPAA and/or OSHA compliance programs without all the paperwork.

For questions or support,
please visit our Help Center
or contact our Care Team
at 800-337-3630, option 3

