City and County of San Francisco
Daniel Lurie, Mayor

San Francisco Department of Public Health
Daniel Tsai
Director of Health

San Francisco Department of Public Health

*Policy & Procedure Detail**

Policy & Procedure Title: D.1.0 Secure Delivery of Protected Health Information Policy – Paper Records	
Category: Privacy	
Effective Date: May 13, 2010	**Last Reviewed/Revised:** 3/11/2026
DPH Unit of Origin: Office of Compliance and Privacy Affairs	
Policy Contact - Employee Name and Title; and/or DPH Division: Office of Compliance and Privacy Affairs (OCPA)	
Contact Phone Number(s): (855) 729-6040	
Distribution: DPH-wide X	**If not DPH-wide, other distribution:**

All sections in table required.

I. **Purpose and Scope:**

A. **Purpose:** This policy provides guidance to staff and providers who, as part of their responsibilities, must send confidential PHI through interoffice mail, US mail, other mail services and fax transmission. Any document containing protected health information (PHI) is considered confidential and must be protected with appropriate safeguards. When documents containing PHI are lost, misplaced, or misdelivered, there is an increased risk of exposure, especially if the documents do not include proper cautions and full contact information.

B. **Scope:** The policy applies to all workforce members working within the San Francisco Department of Public Health and specifically covers the handling of paper records containing Protected Health Information (PHI).

II. **Definitions:**

A. **Workforce Member:** Refers to DPH employees, UCSF employees providing services for DPH, volunteers, trainees, and other persons whose conduct, in the performance of work for a covered entity or business associate, is under the direct control of DPH whether they are paid by DPH.

III. **Procedure:**

A. **Delivery of PHI through Interoffice Mail, US Mail, and Other Mail**: Mailed PHI should be limited to the minimum necessary to accomplish the intended purpose. Employees must complete and attach cover sheet (Protected Health Information Cover Sheet Required for Fax Transmissions, Interoffice Mail, US Mail & Other Mail) to documents that contain PHI.

The packet must be enclosed in a sealed envelope.

B. **Transmission of PHI via Facsimile (fax):** Faxed PHI should be limited to the minimum necessary to achieve the intended purpose. At a minimum, employees must:

1. Confirm that the fax number is correct and inform the recipient of the fax.

2. Complete and attach cover sheet (Protected Health Information Cover Sheet Required for Fax Transmissions, Interoffice Mail, US Mail & Other Mail) to documents containing PHI.

3. Remain at the fax machine until the entire document has been transmitted.

C. **Substance Use Records – 42 C.F.R., part 2:** Substance use federal regulations [42 C.F.R., part 2] require that substance use treatment programs sending documents containing PHI to a third party must include a statement that the documents may not be re-disclosed without authorization from the client.

Last Reviewed/Revised Date: 5/13/2010; 1/11/2021; 2/5/2025; 3/11/2026