

Citrix Workspace and Citrix Content Collaboration Configuration Guide for HIPAA Compliance

This guide contains considerations for setting up Citrix Workspace and Citrix Content Collaboration accounts in Citrix Cloud for organizations with workloads that fall within the scope of the U.S. Health Insurance Portability and Accountability Act (HIPAA).

Basic Requirements

These requirements are important. Please review them in detail.

This guide by itself will not make you HIPAA-compliant: The information contained in this guide is not exhaustive, and you must review, evaluate, assess, and approve your environment in connection with your organization's particular security features, tools, and configurations. This document explains how to help support your own compliance with certain requirements under the HIPAA Privacy and Security Rules, and to ensure that any PHI data sent to Citrix's systems is handled in accordance with those rules. **However, it is your sole responsibility to determine which HIPAA regulatory requirements are applicable to your organization and to ensure that you comply with those applicable requirements.** Importantly, most of the requirements under HIPAA are not technical but administrative (that is, people- and process-oriented). Although this guide can help ensure that Citrix treats PHI in accordance with HIPAA requirements, it cannot help you comply with all HIPAA requirements.

Business Associate Agreement Required

You must have accepted the Citrix Business Associate Agreement (BAA) and follow its requirements, as well as the configuration requirements here, before storing or processing Protected Health Information (PHI) in Citrix cloud services, and then only in Citrix [services that support it](#). If you determine you need a business associate agreement with Citrix, you must accept the Citrix BAA.

Only Certain Citrix Services Applicable

Not all Citrix cloud services are available in HIPAA-compliant configurations, and certain services can only be configured as HIPAA compliant in certain editions. For example, Citrix Workspace is only configurable as HIPAA compliant when purchasing Citrix Workspace Premium or Premium Plus editions. Please consult the list of [Citrix HIPAA Services](#) for more guidance.

New Accounts Only

The configurations in this guide only apply to **new** Citrix accounts. **This guide will not provide you with HIPAA compliance** if you use a pre-existing Citrix Cloud, ShareFile, or Content Collaboration account, or if you upgrade from a pre-existing account, even if you sign a BAA with Citrix.

Certain pre-existing accounts may be eligible for conversion to HIPAA compliance with support from Citrix. Please consult your sales rep for more information.

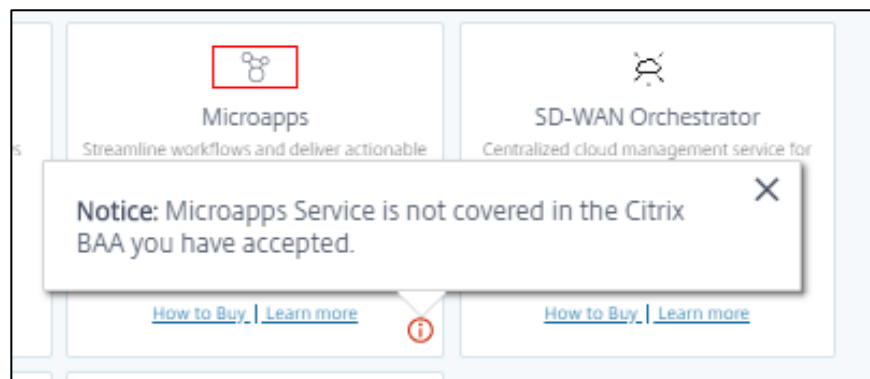
Excluded Features and Services

The features available within HIPAA-configured services may differ from standard services. Importantly, certain features **cannot be used** if a customer requires HIPAA compliance:

- In Citrix Workspace:
 - Microapps service. This includes access to the intelligent feed, virtual assistance, and microapp workflows.
- In Citrix Content Collaboration:
 - Cloud Connectors
 - Feedback and Approval Workflows

After you accept the Citrix BAA, certain notifications will be enabled to help guide you through configuration of your services. For certain features that are excluded from Citrix's list of covered services, the administrator will receive a warning notification. While certain services are disabled by default and are unavailable to end users under the HIPAA configuration, the administrator may still have the ability to enable the service, but it is your responsibility to limit your use of these features to non-PHI data and to determine whether your use meets HIPAA requirements.

For example:

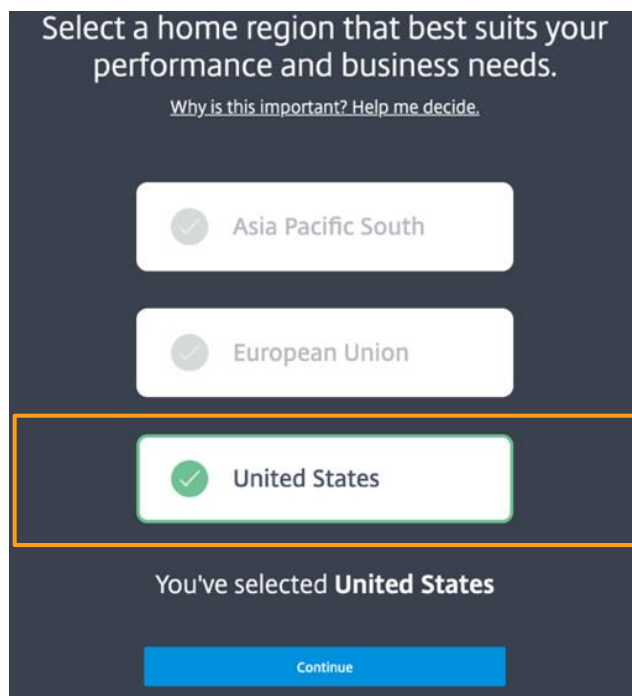


Accepting the Citrix BAA

Prior to storing data or processing any workloads containing protected health information using Citrix products, your organization must have an executed Citrix BAA and follow its requirements.

Step 1: Select United States as the geographical location of your Citrix Cloud account

In order to accept the Citrix BAA, your Citrix Cloud account must be set up in the United States. Accounts in different geographical regions are ineligible for HIPAA configuration.



Select a home region that best suits your performance and business needs.

[Why is this important? Help me decide.](#)

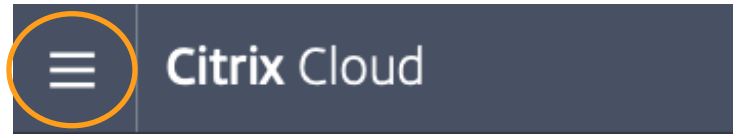
- Asia Pacific South
- European Union
- United States**

You've selected **United States**

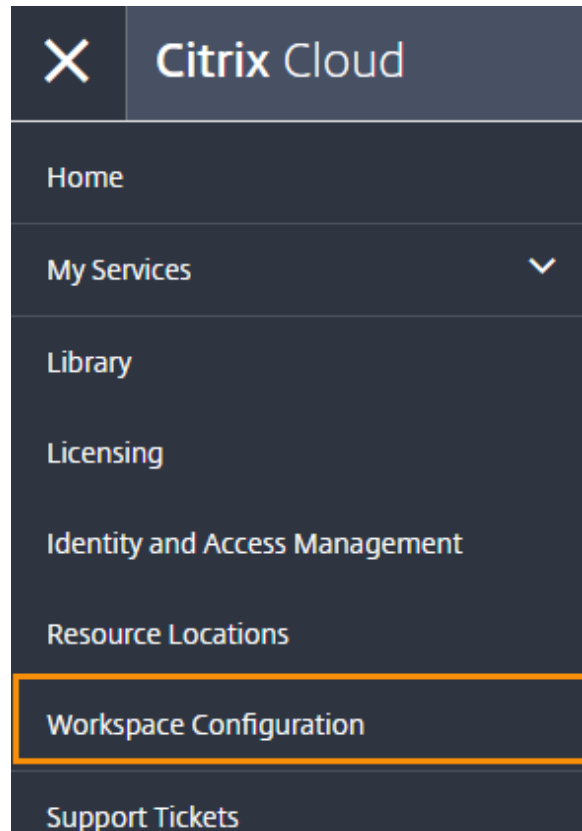
Continue

Step 2: Access the Workspace Configuration panel

Open the Citrix Cloud menu by clicking the icon in the top left corner.

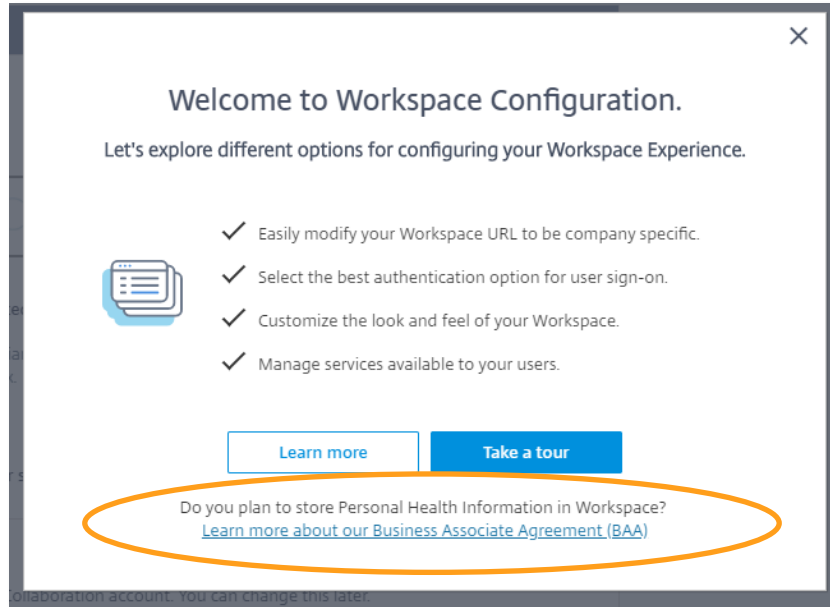


Then select **Workspace Configuration** from the Citrix Cloud menu.

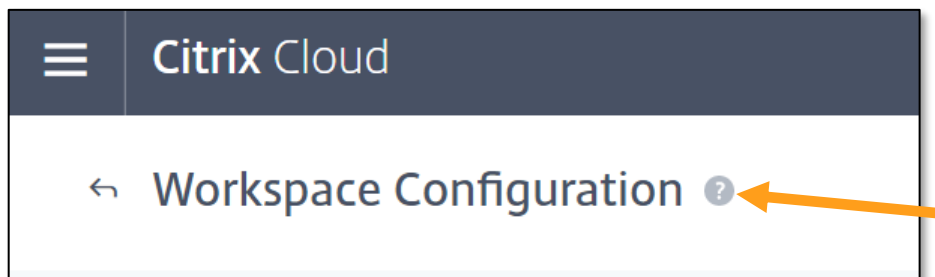


Step 3: Access the Welcome Guide

The first time you access Workspace Configuration, you will see the following guide. Click **Learn more about our Business Associate Agreement (BAA)** at the bottom of the pop-up.

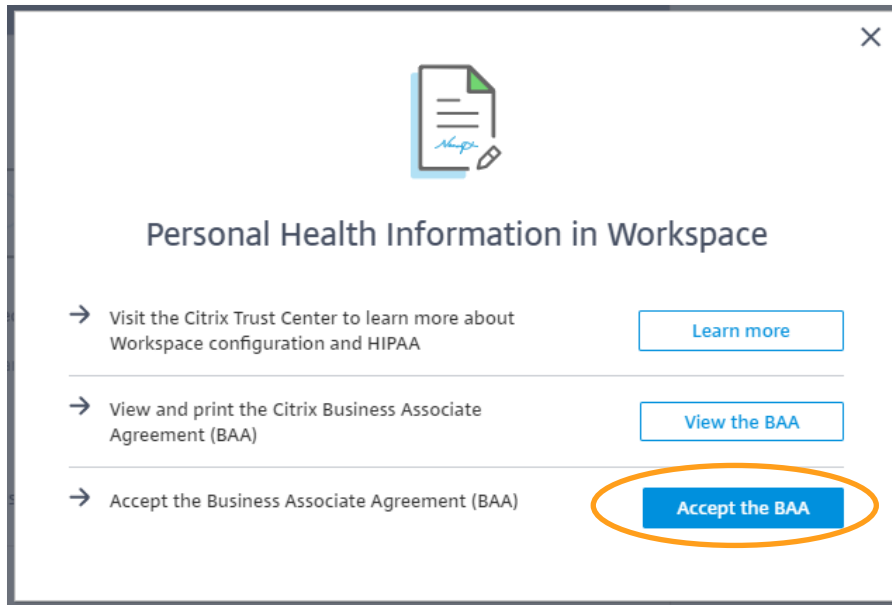


If you do not see the Welcome guide, please click the informational icon next to the title.



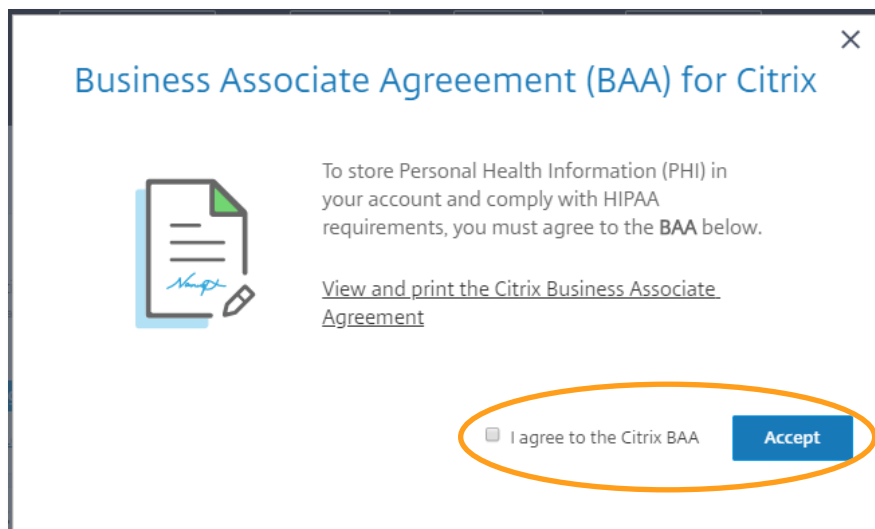
Step 4: Access and Review the Citrix Business Associate Agreement

From this screen, you may access Citrix documentation and accept the BAA. Click the blue **Accept the BAA** button.



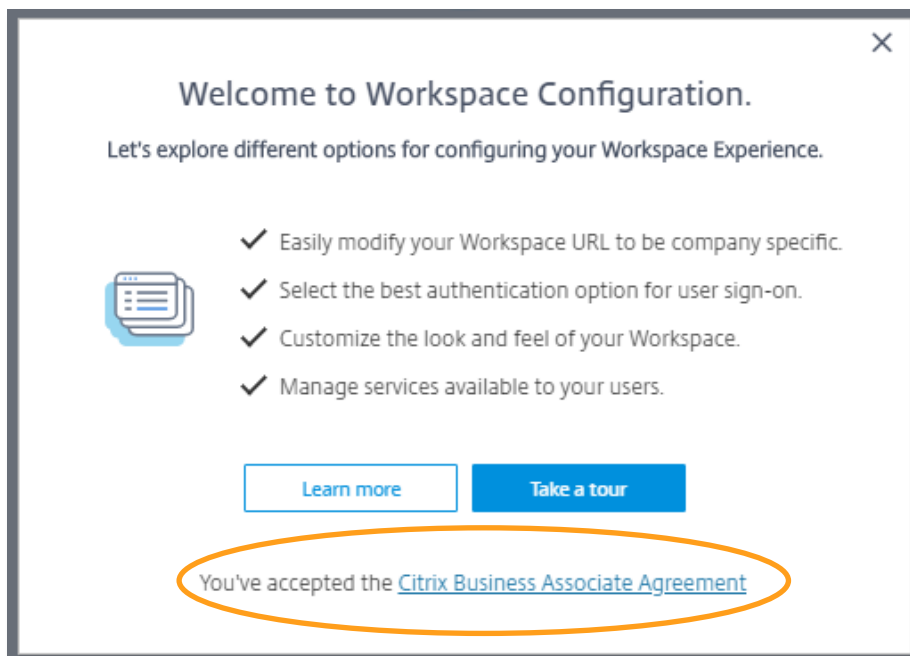
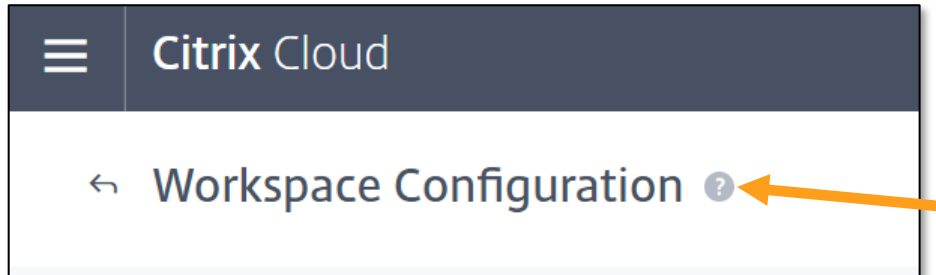
Step 5: Review and Accept the Citrix Business Associate Agreement

You will now be presented with a prompt from which you can review and accept the Citrix BAA. To review the Citrix BAA, please select **View and print the Citrix Business Associate Agreement**. In order to accept the Citrix BAA, please check **I agree to the Citrix BAA** and then **Accept**.



Step 6: Accessing your Executed Business Associate Agreement

In order to access your BAA in the future, navigate back to the Workspace Configuration Welcome guide and click **Citrix Business Associate Agreement**.



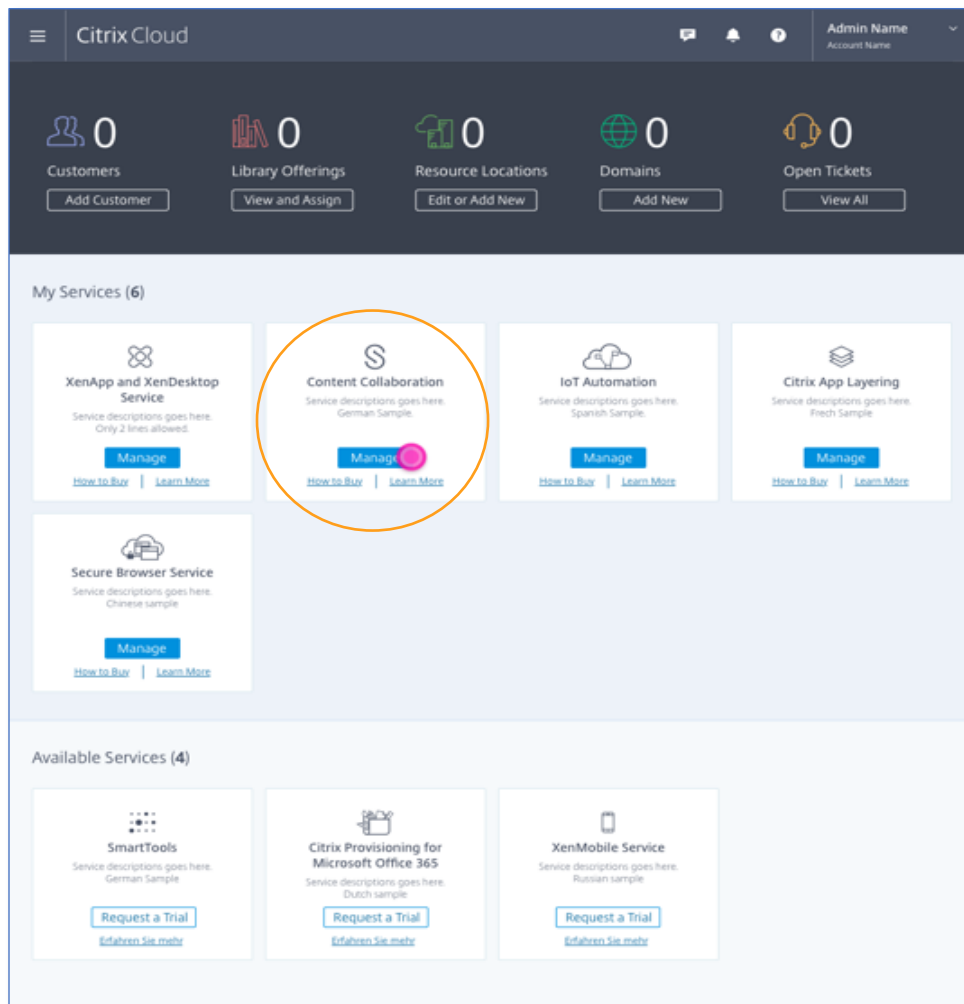
Configuring Citrix Content Collaboration for HIPAA Compliance

You may configure Citrix Content Collaboration for HIPAA compliance the first time you set up your Content Collaboration entitlement. **Please note that after you have set up Content Collaboration, you cannot change the HIPAA configuration.** Thus, an entitlement that is already set up cannot be converted to a HIPAA compliant configuration, and vice versa, even if you assign the Citrix BAA.

Files stored within Content Collaboration are encrypted in transit and at rest. However, file metadata, such as filenames, **remains unencrypted and may not contain any PHI.** File and folder naming conventions are the sole responsibility of the customer.

Step 1: Navigate to the Content Collaboration service

Select **Manage** on the Content Collaboration tile.



Step 2: Assign Entitlements to a New Account

Choose the entitlements you would like to apply to your HIPAA-configured account, then click **Assign to New Account**, select the **I understand...** checkbox, and click **Accept**. (You must create a new account and cannot convert a pre-existing account to a HIPAA-compliant configuration.)

The screenshot shows the Citrix Cloud interface for assigning entitlements. The page title is "Assign Content Collaboration Entitlements". It includes a table of entitlements and a section for selecting an account.

Select Entitlements to apply to an account.
[Skip and Continue to Content Collaboration](#)

Entitlement Name:	Entitlement ID:	SKU:	Licensed Seats:	Start Date:	End Date:
<input type="checkbox"/> Content Collaborat...	11010101010-000	2000376	1000	06/01/2019	06/01/2020
<input type="checkbox"/> Content Collaborat...	11010101010-000	2000376	1000	06/01/2019	06/01/2020
<input type="checkbox"/> Content Collaborat...	11010101010-000	2000376	1000	06/01/2019	06/01/2020

Select Account
We didn't find any Content Collaboration accounts available for entitlement assignment.

Assign to New Account

Looking for a different account?
To link an account, your email address must be an administrator of the Content Collaboration account. For further help, please contact support.

I understand that entitlements assigned to an account cannot be reversed.

Assign

Step 3: Set the Account Details and Create the Account

When creating your new Content Collaboration account, you must select **USA** as the geographical location. In response to the question whether your organization plans to store or maintain PHI in this service, answer **Yes**.

You may not change this configuration after you have created the account. Select the **I understand...** checkbox, choose your Subdomain, and click **Finish**.

The screenshot shows the 'Create a Content Collaboration Account' page in Citrix Cloud. The 'Account Details' section is active. Under 'GEO Location', 'USA' is selected with a green checkmark, and 'EU' is unselected. Below this, the question 'Does your organization plan to store or maintain Protected Health Information (PHI) in this service?' is answered 'Yes'. A checkbox 'I understand that I cannot change this setting after setup is complete.' is checked. The 'Subdomain' field contains 'golddex' and is marked as 'Available'. The 'StorageZone' is set to 'Citrix Cloud East Coast'. A 'Finish' button is located at the bottom of the form.

You have now completed the steps required per this configuration guide. Again, please note that it is your sole responsibility to ensure compliance with all applicable HIPAA requirements. Please reach out to Citrix if you need more information.