HIPAA PRIVACY AND SECURITY POLICY
Method Wellness & Infusion

Legal Entity: Serenity Wellness & Infusion LLC
DBA: Method Wellness & Infusion
Address: 401 S Mill Ave #201, Tempe, AZ 85281

HIPAA Privacy Officer: James Jett Summers – Manager
HIPAA Security Officer: James Jett Summers – Manager

1. Purpose

This policy establishes safeguards to protect the privacy, confidentiality, integrity, and availability of Protected Health Information (PHI) handled by Method Wellness & Infusion.

The organization complies with all requirements under the Health Insurance Portability and Accountability Act (HIPAA).

2. Scope

This policy applies to all workforce members including:

• Medical Director
• Nurse Practitioner
• Registered Nurse
• Administrative staff
• Front desk staff
• Contractors and vendors with PHI access

3. Electronic Medical Record System

All patient records are maintained electronically using the Boulevard practice management and electronic medical record platform.

Boulevard is used for:

• patient charting
• scheduling
• billing
• intake documentation
• automated appointment reminders

No paper medical charts are maintained.

4. Permitted Uses of PHI

Protected Health Information may be used or disclosed for:

Treatment
• coordination between clinical staff

Payment
• processing payments through Boulevard
• patient financing through Cherry

Healthcare Operations
• scheduling
• internal quality review
• administrative management

5. Patient Communication

The practice communicates with patients using:

• phone calls
• secure patient portal
• email via Google Workspace
• automated appointment reminders via text or email

Text messaging is used only for appointment reminders and non-clinical communications.

Clinical information is not transmitted via SMS.

6. Telehealth

Telehealth services may occasionally be used for follow-up consultations when clinically appropriate. All telehealth communication must occur through HIPAA-compliant systems.

7. Workforce Access Controls

Access to PHI is restricted based on job responsibilities.

Full clinical access:
• Medical Director
• Nurse Practitioner
• Registered Nurse

Administrative access:
• Front desk staff
• Administrative staff
• Practice manager

Employees may only access the minimum information necessary to perform job duties.

8. Technical Safeguards

All systems containing PHI implement:

• unique user credentials
• password protection
• automatic screen locking
• encrypted data storage
• audit logs

Access to patient records is permitted only through secure clinic devices.

Personal devices are not permitted to access or store PHI.

9. Physical Safeguards

The clinic maintains physical security including:

• restricted access to workstations
• password-protected computers
• secured office environment
• security cameras in common areas

No cameras are installed in treatment rooms.

10. Network Security

The facility operates:

• a secure password-protected internal network for staff systems
• a separate password-protected guest network for visitors

PHI systems may only connect to the secure internal network.

11. Business Associates

The organization maintains Business Associate Agreements (BAAs) with vendors that may access PHI including:

• Boulevard
• Google Workspace
• Cherry financing platform

12. Data Retention

Medical records are retained for a minimum of seven years following the patient's last visit, consistent with Arizona healthcare record retention standards.

13. Breach Reporting

All workforce members must immediately report suspected unauthorized access, disclosure, or loss of PHI to the HIPAA Officer.

Incidents will be investigated promptly and affected patients will be notified if required by law.

14. Training

All employees must complete HIPAA training upon hire and annually thereafter. Training is administered by the HIPAA Officer.

15. Enforcement

Violations of this policy may result in disciplinary action including termination of employment.

Serious violations may result in civil or criminal penalties under federal law.

Effective Date: _____

Approved By:
James Jett Summers
HIPAA Privacy & Security Officer