SFA SOLUTIONS
SMART FINANCIAL ADMINISTRATION

SFA Solutions Security Overview

Version October 2026 · SFA Solutions LLC, Austin, Texas

This overview describes the controls SFA Solutions has in place today to protect practice and patient information. It lists only controls we operate. Specific obligations are set out in each client's service agreement and Business Associate Agreement (BAA).

Controls in place

Business Associate Agreement	We sign a BAA with every client before we access any protected health information. It sets out how information is used, protected, returned or destroyed.
Workforce HIPAA training	Team members complete HIPAA privacy and security training.
Multi-factor authentication	Staff use multi-factor authentication on the systems they use for client work.
Encrypted devices	Staff computers used for client work are encrypted.
Annual risk assessment	We complete a HIPAA security risk assessment every year and act on what it finds.
Access you control	We work inside your EHR, PM system and clearinghouse with user accounts your practice creates. You can change or remove access at any time.
Minimum necessary use	Patient information is used only for the billing and revenue cycle work in our agreement and BAA.
No PHI through our website	Website forms collect practice contact details only. Visitors are asked not to send patient information.
Breach notification	We notify clients of breaches of unsecured PHI as required by HIPAA and the BAA.
Data retention	Retention and return or destruction of client data follow the BAA and our Privacy Policy.

How we access client systems

We work inside each practice's own EHR, practice management system and clearinghouse, using named user accounts the practice creates. The practice controls these accounts and can change or remove access at any time. We do not require a software migration.

Technology

SFA Intelligence, our AI-assisted workflow, runs on the RCM Employee platform, which SFA licenses. AI tools check and sort work; SFA team members review results and are accountable for every claim.

What we do not claim

SFA Solutions does not hold SOC 2, HITRUST or ISO 27001 certification and does not claim them.

Security contact

Email info@sfasolutions.net (subject: Security) or call (616) 797-9171. Monday to Friday, 8:00 AM to 5:00 PM CT.