

**Nebraska Methodist Hospital  
BUSINESS ASSOCIATE WORKSHEET**

**PART I: INSTRUCTIONS**

1. Complete in accordance with Contracting Policy.
1. Include each function related to protected health information the BA will perform.
2. Contact your Contract Coordinator or Privacy Officer for assistance or with questions.
3. File a completed worksheet in the contract file and retain for the duration of the contract and all extensions plus six (6) years. Send a copy to the central file.

---

**PART II: IDENTIFYING INFORMATION**

1. MHS Affiliate (Covered Entity): \_\_\_\_\_
2. Business Associate: \_\_\_\_\_
3. Function: \_\_\_\_\_  
\_\_\_\_\_
4. Explain basis for Business Associate Classification: \_\_\_\_\_  
\_\_\_\_\_
5. BA relationship is for:  
 Treatment  
 Payment  
 Healthcare Operations (Explain)  
 Other (Explain)  
Explanation (if needed): \_\_\_\_\_
6. Completed By: \_\_\_\_\_ 7. Date: \_\_\_\_\_
8. Approved By: \_\_\_\_\_ 10. Date: \_\_\_\_\_
11. Is the BA also a "Covered Entity"?  Yes  No

**PART III: MATCHING PHI TO FUNCTION**

1. PHI needed to perform the function? \_\_\_\_\_  
\_\_\_\_\_
2. PHI actually furnished or made available? \_\_\_\_\_  
\_\_\_\_\_
3. Explain the manner/medium in which PHI will be furnished to the BA: \_\_\_\_\_

---

3. Explain any "gap" between PHI needed and PHI furnished or made available: \_\_\_\_\_

---

---

4. Will the BA use a subcontractor; will a subcontractor have access to or possession of PHI?

\_\_\_ Yes \_\_\_ No If "yes" explain: \_\_\_\_\_

**PART IV: RETURN OR DESTRUCTION**

1. Will the BA (Check as many as applicable): \_\_\_gather \_\_\_take \_\_\_use \_\_\_store any PHI off-site, or \_\_\_ take possession of and use any PHI on-site, to perform this function? If you checked any of the above options, explain below and answer the balance of Part IV: \_\_\_\_\_

---

---

2. What provision is made for return or destruction of the PHI and at what intervals? \_\_\_\_\_

---

---

---

3. Will this result in return or destruction of the PHI:

- \_\_\_ upon termination or expiration of the contract?
- \_\_\_ at stated intervals when no longer needed by the BA for the BA function?
- \_\_\_ other? (Explain)

4. Are any special terms needed to assure timely return or destruction? Explain: \_\_\_\_\_

---

---