



Optimal Family Medicine, PLLC
1455 S 500 W Ste B
Bountiful, UT 84010
Ph: 801-784-2111 • Fax: 844-670-1991

June 5th, 2026

Re: Important notice about the closure of Optimal Family Medicine, PLLC and your options for ongoing care

We are writing to let you know that Optimal Family Medicine, PLLC will close on **7/8/26**. We are grateful for the trust you placed in us and it has been a privilege to participate in your care. Our goal is to make this transition as smooth as possible and to help you continue your care without interruption.

Your care through the closure date and urgent-need coverage. We will continue to provide care to established patients and manage clinically appropriate prescription refills through 7/8/26 to ensure adequate time for safe transitions. For urgent issues that arise before 7/8/26, please call our office at 801-784-2111. After hours or at any time if you are experiencing a medical emergency, call 911 or go to the nearest emergency department. After 7/8/26 we will no longer be available for ongoing clinical care, but will ensure that any critical test results ordered before closure are communicated to you and, with appropriate written authorization, to your next provider.

Medication refills and controlled medications. For most maintenance medications, we will provide clinically appropriate refills through 7/8/26. For medications that require close monitoring or that are controlled substances, new or ongoing prescriptions after 7/8/26 should be coordinated with your next treating provider to ensure safe and appropriate management. If you receive controlled medications now, please schedule promptly with a new provider to avoid a lapse. Before the closure date, contact our office by phone at 801-784-2111 for clinically appropriate bridging refills

Choosing your next provider. You are free to choose any provider you prefer. Listed below are a few appropriate local primary care options. These options are suggestions only; the choice is

yours. They are listed in no particular order. You may reach out to any other medical clinics or providers you would prefer.

Clinic	Address	Phone Number
Oaks Medical Group	557 W 2600 S, Bountiful, UT 84010	(801) 298-9155
Bountiful Clinic	390 N Main St, Bountiful, UT 84010	(801) 397-6300
Cope Family Medicine - Ogden Clinic	185 S 400 E Suite 100, Bountiful, UT 84010	(801) 298-4112

Your medical records and how to get them. For your convenience, we have included a copy of the Utah Department of Health and Human Services authorization for release of information form. This form may be completed, signed, and mailed to Optimal Family Medicine, PLLC to request a copy of your records or authorize the release of your records to another healthcare provider.

We will respond promptly and within required time frames. If you direct us to send your records to another health care provider for your treatment, we will do so without charging you a fee. If you request a copy for yourself, a reasonable, cost-based fee may apply as allowed by law; we will tell you the amount in advance. If you prefer to receive records by unencrypted email, we will accommodate that request if you ask us in writing after we explain the security risks.

After 7/8/26, our records custodian, Morgan Records Management, will securely maintain your medical records on our behalf. Requests can be submitted to them on their website directly:

<https://morganrecordsmanagement.com/request-my-records/>

For assistance on how to fill out the form, you may email them at medical@morganrecords.com or call them at 833-888-0061.

How records will be kept after closure. After 7/8/26, our records custodian, Morgan Records Management, will securely maintain your medical records on our behalf. They will retain your records for at least seven years from your last visit, and for patients who were minors at their last visit we will retain records at **least until the patient reaches age 18 plus additional years consistent with applicable law and professional standards. If a longer period is required by law, they will follow the longer period. When the required retention period ends, records will be destroyed securely.**

How we will protect your information. We have confirmed that our records custodian uses administrative, physical, and technical safeguards that meet or exceed all applicable privacy and security standards. The custodian acts on our behalf and will maintain records confidentiality. If a security incident or breach affecting your information is discovered, you will receive any notices required by law. To protect your privacy, please do not send medical information to any

general email address. For record requests and questions, use secure patient portal, mail, or secure fax (the fax specified in our letterhead if before our closure date, or those methods specified in the prior section of this letter if after our closure date).

Special privacy considerations. If your record includes specially protected information, such as substance use disorder treatment records from a federally assisted program, additional written consent may be required before we can share that part of your record, even with another provider. If this applies to you, we will provide the appropriate consent form and help with your request. For minors and for patients with a legal personal representative, we will follow applicable laws about who may request and receive records.

Pending test results and follow-up. If you have test results pending as we approach 7/8/26, we will review them and will contact you with results and any recommended next steps. If you have not heard about results from a test performed within 14 days of 7/8/26, please contact us at 801-784-2111 before 7/8/26 or contact the records custodian after that date for assistance.

How to contact us now and after closure. You may reach our office for appointments, clinical questions related to active treatment plans, and medication refills through 7/8/26 at 801-784-2111 or through the secure portal. After 7/8/26, please direct record requests and questions about records to our records custodian at Morgan Records Management. For assistance on how to fill out the form, you may email them at medical@morganrecords.com or call them at 833-888-0061.

Nondiscrimination and accessibility. We do not discriminate on the basis of race, color, national origin, age, disability, sex, or any other status protected by law. We provide free aids and services to people with disabilities and free language services to people whose primary language is not English; to request these services during the transition period, contact us at 801-784-2111 before 7/8/26 or 833-888-0061 after 7/8/26.

Thank you again for the privilege of participating in your care. We wish you the very best in health and stand ready to assist with your transition.

Sincerely,

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