

A covered individual and/or personal representative may request an accounting of disclosures by completing and submitting this form. A decision regarding the request will be made within time frames specified by law. The Board of Pensions will provide an accounting of disclosures except for Excluded Disclosures (see Definition of Terms below).

Date of request _____

Name of covered individual _____

Requestor's name *(if different)* _____

Last 4 digits of SSN of covered individual _____

Accounting report dates (cannot exceed six years prior to date of request; the Board of Pensions is not required to account for disclosures that occurred prior to April 14, 2003):

From *(mm/dd/yyyy)* _____

To *(mm/dd/yyyy)* _____

Address to which you would like the report sent (a fee for processing and mailing may be charged if you have requested and received a report in the past 12 months):

Address _____

City _____

State _____

ZIP _____

If you are requesting access to information on behalf of someone other than yourself, please enclose proof of your authority to do so (i.e., Power of Attorney, Guardianship Order, Custody Order, Court Order).

Signature of requestor _____

Definition of Terms

Covered Individual: person covered by the Medical Plan of the Benefits Plan of the Presbyterian Church (U.S.A.).

Enrollment and Benefit Information: information that gives name, age, sex, date of birth, address, employment and effective salary, etc. Benefit information explains the type of health coverage an individual is eligible to receive.

Excluded Disclosures: The accounting will not include those disclosures that are made

- to the individual
- to persons involved in the individual's care
- to some legal authorities or correctional institutions
- authorized by the individual
- for facility directories
- for national security or intelligence needs
- prior to April 14, 2003
- for treatment, payment or healthcare operations

Personal Representative: someone who has the legal authority to act on the covered individual's behalf. Parents may be personal representatives for minors, except those minors who have been given the legal freedom to act on their own.

Personal representatives may include guardians, conservators and other persons who have been given legal responsibility for another individual. Federal law, state law, and the specific terms of the appointment determine the authority granted to the personal representative.

Questions? Call the Board of Pensions at 800-773-7752 (800-PRESPLAN) or email memberservices@pensions.org.