



Medical Plans Request for Accounting of Disclosures

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).

Please complete the following:	
Date of request	
Name of covered individual	Last 4 digits of SSN
Requestor's name (if different)	

Accounting report dates: <i>(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)</i>	
From (mm/dd/yyyy)	To (mm/dd/yyyy)

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

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

Definition of terms
<p>Covered Individual: person covered by the Medical Plan of the Benefits Plan of the Presbyterian Church (U.S.A.)</p> <p>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.</p> <p>Excluded Disclosures: The accounting will not include those disclosures that are made</p> <ul style="list-style-type: none"> • 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 <p>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.</p> <p>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.</p> <p>Questions? Call the Board of Pensions at 800-773-7752 (800-PRESPLAN) or email memberservices@pensions.org.</p>

Due to current circumstances, DO NOT mail this form to the Board of Pensions.
To avoid delays in processing, email your completed form to memberservices@pensions.org. If you need assistance emailing this form, please contact the Board at 800-773-7752 (800-PRESPLAN).