

Instructions for completing the Designation of Representative/Authorization Form



This form is to be used for a grievance or an appeal and to allow a party to act as the Authorized Representative in carrying out a grievance or an appeal.

If you have any questions, please feel free to call us at the customer service number on your member identification card.

Please read the following for help completing page one of the form.

Part A: Member information

This section applies to the member who is asking for the release of his or her information to another person or company or a request to appoint an Authorized Representative. Please include as much information as you can.

- 1 Print your last name, first name, and middle initial.
- 2 Write your date of birth in this format: mmddyyyy. (If you were born on October 5, 1960, you would write 10051960.)
- 3 Write your full street address, city, state, and ZIP code.
- 4 Write your daytime phone number (including area code.)
- 5 Write your cell/mobile number (including area code.)
- 6 **Identification number**
You will find this number on your member identification card.
- 7 **Group number**
You will find this number on your member identification card. If your identification card does not have a group number leave this blank.

Part B: Person or company who can receive this information

- 8 Check the box that applies to you. Write the full name of the person or company that you want us to give your information to. Please don't use a general term like "my daughter" or "my son" as it will not be accepted. You need to be specific.
- 9 If you check "Other," give the first and last name (if available), the name of the company (if applicable), and how they relate to you.

Part C: Information that can be released

This section tells us what information you would like us to release: all or just some.

- 10 For "all of your information," check the first box (this does not include sensitive information.)
- 11 For "limited information," check the second box and the boxes that apply to you.
- 12 Some topics may be very personal or sensitive to you. If you wish to approve the release of this type of information, check the box(es) that apply to you.

Designation of Representative/Authorization Form

This form is to be used for a grievance or an appeal (see Section D) and to allow a party to act as the Authorized Representative in carrying out a grievance or an appeal. This form is to be filled out by an individual if there is a request to release an individual's health information to another person or company. Please include as much information as you can. (If an individual wants to designate an Authorized Representative not related to a grievance and appeal, use the Member Authorization form.)

Part A: Member information

Member last name 1		Member first name		Middle initial	Member date of birth (MMDDYYYY) 2
Member street address 3		City		State	ZIP code
Daytime phone number (with area code) 4	Cell/mobile phone number (with area code) 5	Identification number (see identification card) 6		Group number (see identification card) 7	

Part B: Person or company who will receive this information

The following people or companies have the right to receive my information. They must be 18 years of age or older. Please enter first and last name. By entering first/last name below, that person may receive my information.

My spouse (enter first and last name) 8	My parents (if you are over 18 -- enter first and last name(s))
My domestic partner (enter first and last name)	My insurance broker or agent (enter the name of the company and first and last name, if you have it)
My adult children (enter first and last name(s))	Other (enter first and last name, if you have it, name of company, and how it's related to you) 9

Part C: Information that can be released

I allow the following information to be used or released by Anthem Blue Cross and Blue Shield (Anthem) on my behalf:
Check only one box.

10 All my information. This can include health, a diagnosis (name of illness or condition), claims, doctors and other healthcare providers and financial information (like billing and banking). This doesn't include sensitive information (see below) unless it is approved below.

OR

11 Only limited information may be released (check all boxes below that apply to you).

<input type="checkbox"/> Appeal	<input type="checkbox"/> Eligibility and enrollment	<input type="checkbox"/> Referral
<input type="checkbox"/> Benefits and coverage	<input type="checkbox"/> Financial	<input type="checkbox"/> Treatment
<input type="checkbox"/> Billing	<input type="checkbox"/> Medical records	<input type="checkbox"/> Dental
<input type="checkbox"/> Claims and payment	<input type="checkbox"/> Pre-certification and pre-authorization (for treatment approvals)	<input type="checkbox"/> Vision
<input type="checkbox"/> Doctor and hospital		<input type="checkbox"/> Pharmacy
<input type="checkbox"/> Diagnosis (name of illness or condition) and procedure (treatment): _____		

I also approve the release of the following types of sensitive information by Anthem (check all boxes that apply to you):

12 All sensitive information²

OR

Just sensitive information about topics checked below

<input type="checkbox"/> Abuse (sexual/physical/mental)	<input type="checkbox"/> HIV or AIDS	<input type="checkbox"/> Reproductive health ³ (including abortion, maternity, etc.)
<input type="checkbox"/> Substance use disorder ^{1,2}	<input type="checkbox"/> Mental health	
<input type="checkbox"/> Genetic testing	<input type="checkbox"/> Sexually transmitted illness	

1 Specify time period of records to be disclosed: _____
Description of records that may be disclosed: _____

2 Unless I specify otherwise on this form, I intend this disclosure to include all substance use disorder records maintained by Anthem about me. I understand that my substance use disorder records are protected under Federal and State confidentiality laws and regulations and cannot be disclosed without my written consent unless otherwise provided for in the laws and regulations. I also understand that I may revoke (or cancel) this approval at any time, or as described in Part E. I understand that I cannot cancel this approval when this form has already been used to disclose information.

3 Reproductive health includes, but it not limited to, both male and female infertility, maternity, pregnancy loss, miscarriage, family planning, birth control, both elective and spontaneous abortion, and any other related care or services.

Anthem Blue Cross and Blue Shield is the trade name of its Colorado: Rocky Mountain Hospital and Medical Service, Inc. (HMO products underwritten by HMO Colorado, Inc. in Connecticut: Anthem Health Plans, Inc. in Georgia: Blue Cross Blue Shield Healthcare Plan of Georgia, Inc. in Indiana: Anthem Insurance Companies, Inc. in Kentucky: Anthem Health Plans of Kentucky, Inc. in Maine: Anthem Health Plans of Maine, Inc. in Missouri: (including 30 counties in the Kansas City area): HighPoint® Managed Care, Inc. (HMO) Healthy Alliance® Life Insurance Company (HMO), and HMO Missouri, Inc. (HMO) and certain other plans administered separately by HighPoint® Managed Care, Inc. in New York: Anthem Health Plans of New York, Inc. in North Carolina: Anthem Health Plans of North Carolina, Inc. in North Dakota: Anthem Health Plans of North Dakota, Inc. in Ohio: Anthem Health Plans of Ohio, Inc. in Oklahoma: Anthem Health Plans of Oklahoma, Inc. in Oregon: Anthem Health Plans of Oregon, Inc. in Pennsylvania: Anthem Health Plans of Pennsylvania, Inc. in Rhode Island: Anthem Health Plans of Rhode Island, Inc. in South Carolina: Anthem Health Plans of South Carolina, Inc. in Tennessee: Anthem Health Plans of Tennessee, Inc. in Texas: Anthem Health Plans of Texas, Inc. in Utah: Anthem Health Plans of Utah, Inc. in Virginia: Anthem Health Plans of Virginia, Inc. and its service area(s) of Virginia except for the City of Fairfax, the State of Virginia, and the area east of State Route 123. In Wisconsin: Blue Cross Blue Shield of Wisconsin (BCSW), operates or administers PPO and indemnity policies and underwrites the sale of network benefits of PPO policies offered by Corporate Health Services Insurance Corporation (CHSIC) or Wisconsin Collaborative Insurance Corporation (WCIC). Corporate underwrites or administers HMO or PPO policies. HMO, underwrites or administers Well Priority (HMO) or PPO policies. Independent licensees of the Blue Cross Blue Shield Association. Anthem is a registered trademark of Anthem Insurance Companies, Inc. 1046538MUMENABS 11/22

Please read the following for help completing page two of the form.

Part D: Person or company who can act as my authorized representative

This section tells us who you have given the right to act as your Authorized Representative in carrying out a grievance or appeal. Part B and C must also be completed to authorize the release of your information.

- 1 Check the box that applies to you. Write the full name of the person or company that you want to act as your Authorized Representative. Please don't use a general term like "my daughter" or "my son" as it will not be accepted. You need to be specific.
- 2 If you check "Other", give the first and last name (if available), the name of the company (if applicable, and how they relate to you).

Part E: Date your approval expires

You have two choices of when you would like this approval to end.

- 3 Check the first box for the conclusion of the grievance or appeal process.
- 4 Check the second box for an earlier date (please provide details.)

Part F: Purpose of this approval

This section tells us the reason you've asked for the release of your information.

- 5 Check the first box to let us know who to give out this information as shown on this form.
- 6 Check the second box to let us know what information to give out (identified in Part C.)

Part G: Review and approval

- 7 Sign your name and put the date on the form. Your name and signature must match the information in Part A.
- 8 If you are signing this form on behalf of another person, or if you have Power of Attorney for healthcare, or are a legal guardian/conservator you must do the following:
 - You must complete the Designated Legal Representative/Guardian section.
 - You must also provide us with a copy of the legal document showing that you are approved and include it with this form.

Part D: Person or company who can act as my authorized representative

The following person or company has the right to act as my Authorized Representative. An Authorized Representative is a person who you appoint to be your representative in carrying out a grievance or appeal, including any external review rights that may be available to you. They must be 18 years of age or older. Please also complete Part B and C above to authorize the release of your information to your Authorized Representative. Please check each box that applies and enter first and last name.

My spouse (enter first and last name)	My parents (if you are over 18 – enter first and last name(s))
My domestic partner (enter first and last name)	My insurance broker or agent (enter the name of the company and first and last name, if you have it)
My adult children (enter first and last name(s))	Other (enter first and last name, if you have it, name of company, and how it's related to you)

Part E: Date your approval expires

If this document was not already withdrawn, this approval will end on the earliest of the following dates:

- 3 At the conclusion of the grievance or appeals process. **OR**
- 4 One year from the signature date in Part G.

Part F: Purpose of this approval

- 5 To allow an individual to act as my Authorized Representative in carrying out a grievance or appeal, including any external review rights that may be available to me.
- 6 To disclose information at my request.

Part G: Review and approval

I have read the contents of this form. I understand, agree, and allow Anthem to the use and release of my information as I have stated above. I also understand that signing this form is of my own free will. I understand that Anthem does not require that I sign this form in order for me to receive treatment or payment, or for enrollment or being eligible for benefits.

I have the right to withdraw this approval at any time by giving written notice of my withdrawal to Anthem. I understand that my withdrawing this approval will not affect any action taken before I do so. I also understand that information that's released may be given out by the person or group who receives it. If this happens, it may no longer be protected under the HIPAA Privacy Rule. I am entitled to a copy of this form.

Member signature or Designated Legal Representative/Guardian signature X	Date (MMDDYYYY)
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Designated Legal Representative/Guardian – Complete this section only if you have documentation supporting Legal Representation.

If this form is signed by someone other than the member or parent, such as a personal representative, legal representative or guardian on behalf of the member, please submit the following:

- A copy of a healthcare, general or Durable Power of Attorney. **OR**
- A court order or other documentation that shows custody or other legal documentation showing the authority of the legal representative to act on the member's behalf.

Please complete the following:

Legal representative (print full name)	Legal relationship to member
Legal representative street address	City
State	ZIP code
Signature X	Date (MMDDYYYY)

Please return the completed form to:
Anthem Blue Cross and Blue Shield

Be sure to keep a copy of this form for your records.

Examples of legal documents:

- **Health Care, General or Durable Power of Attorney.** This document gives someone you trust the legal power to act on your behalf and make health care decisions for you.
- **Legal Guardianship.** This is when the court appoints someone to care for another person.
- **Conservatorship.** This happens when a judge appoints a responsible person to make decisions for someone who can't make responsible decisions for him/herself.
- **Executor of estate.** This type of document would be used when the person who is being represented has died.

Designation of Representative/Authorization Form



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Part A: Member information

Member last name		Member first name		Middle initial	Member date of birth (MMDDYYYY)
Member street address		City		State	ZIP code
Daytime phone number (with area code)	Cell/mobile phone number (with area code)	Identification number (see identification card)		Group number (see identification card)	

Part B: Person or company who will receive this information

The following people or companies have the right to receive my information. They must be 18 years of age or older. Please enter first and last name. By entering first/last name below, that person may receive my information.

My spouse (enter first and last name)	My parents (if you are over 18 – enter first and last name[s])
My domestic partner (enter first and last name)	My insurance broker or agent (enter the name of the company and first and last name, if you have it)
My adult children (enter first and last name[s])	Other (enter first and last name, if you have it, name of company, and how it's related to you)

Part C: Information that can be released

I allow the following information to be used or released by Anthem Blue Cross and Blue Shield (Anthem) on my behalf:

Check only one box.

All my information. This can include health, a diagnosis (name of illness or condition), claims, doctors and other healthcare providers and financial information (like billing and banking). This doesn't include sensitive information (see below) unless it is approved below.

OR

Only limited information may be released (check all boxes below that apply to you).

<input type="checkbox"/> Appeal	<input type="checkbox"/> Eligibility and enrollment	<input type="checkbox"/> Referral
<input type="checkbox"/> Benefits and coverage	<input type="checkbox"/> Financial	<input type="checkbox"/> Treatment
<input type="checkbox"/> Billing	<input type="checkbox"/> Medical records	<input type="checkbox"/> Dental
<input type="checkbox"/> Claims and payment	<input type="checkbox"/> Pre-certification and pre-authorization (for treatment approvals)	<input type="checkbox"/> Vision
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All sensitive information²

OR

Just sensitive information about topics checked below

<input type="checkbox"/> Abuse (sexual/physical/mental)	<input type="checkbox"/> HIV or AIDS	<input type="checkbox"/> Reproductive health ³ (including abortion, maternity, etc.)
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Part D: Person or company who can act as my authorized representative

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Please check each box that applies and enter first and last name.

<input type="checkbox"/> My spouse (enter first and last name)	<input type="checkbox"/> My parents (if you are over 18 – enter first and last name(s))
<input type="checkbox"/> My domestic partner (enter first and last name)	<input type="checkbox"/> My insurance broker or agent (enter the name of the company and first and last name, if you have it)
<input type="checkbox"/> My adult children (enter first and last name(s))	<input type="checkbox"/> Other (enter first and last name, if you have it, name of company, and how it's related to you)

Part E: Date your approval expires

If this document was not already withdrawn, this approval will end on the earliest of the following dates:

- At the conclusion of the grievance or appeals process. OR
 One year from the signature date in Part G.

Part F: Purpose of this approval

- To allow an individual to act as my Authorized Representative in carrying out a grievance or appeal, including any external review rights that may be available to me.
 To disclose information at my request.

Part G: Review and approval

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- A copy of a healthcare, general or Durable Power of Attorney. OR
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Please complete the following:

Legal representative (print full name)	Legal relationship to member		
Legal representative street address	City	State	ZIP code
Signature X	Date (MMDDYYYY)		

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Anthem Blue Cross and Blue Shield

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