



Instructions for Completing Standard Authorization Form To Use or Disclose Protected Health Information

Under the HIPAA Privacy Rule, an **individual** may authorize the release of his or her protected health information (PHI) to a specific person or entity. Please follow the instructions below for completing the Blue Cross Blue Shield of New Mexico (BCBSNM) Standard Authorization Form to Use or Disclose Protected Health Information (PHI). If you need assistance in completing the authorization form, please call the Customer Service number listed on the back of your BCBSNM Membership Identification card.

Please remember:

- One **authorization form** can be used for a range of and/or multiple services or providers.
- **Authorization** forms can be completed claim by claim, procedure by procedure, or for services within specified timeframes.
- The **individual's** use of the **authorization form** is always voluntary.

I. Individual (Name and information of person whose protected health information is being disclosed):

Jane Doe		05-10-1962	
Name		Date of Birth	
123456	XOP123456789	123-45-6789	
Group #	Identification/Subscriber #	Social Security Number	
123 Main Street	Anytown	NM	12345
Address	City	State	ZIP
312-555-1212			
Area Code & Telephone Number			

All of the information in **Section I** pertains to the individual for whom the authorization is being requested. The individual may be the subscriber, his or her spouse, a dependent or any other **individual** covered or applying for coverage under the subscriber's membership. All fields in this section are **required**. In this example, Jane Doe is the individual for whom the authorization is being requested.

II. Authorization and Purpose:

I request and authorize Blue Cross and Blue Shield of New Mexico to disclose my protected health information as described below. **I understand that if the person/organization authorized to receive and use the information is not a health plan or health care provider, the disclosed information may no longer be protected by federal privacy regulations.**

Suzy Smith	Daughter	Assisting in medical care	
Persons/Organizations authorized to receive your information	Relationship	Purpose	
456 Mill Road	Happytown	IL	45678
Address	City	State	ZIP

Section II identifies the person/entity that will be receiving the PHI about the individual identified in Section I. An individual could authorize disclosure of his or her PHI to a close friend, a broker, an attorney, or a specific member of his or her employer's benefits staff. The individual may also authorize disclosure to an organization. Include the information identifying the organization's job titles to receive the PHI (e.g., Benefits Representatives, Human Resources Department, XYZ Insurance Agency, etc.). In this example, Jane Doe has identified her daughter, Suzy Smith as the person who is authorized to receive her information.

III. Specific Description of Information to be Used or Disclosed (Please Complete *Parts A and B* in this Section)

This Authorization CANNOT be used to disclose Psychotherapy Notes.

Section III will assist in determining what PHI the individual identified in Section I allows the receiving person/entity identified in Section II to receive. This section has two parts, both of which must be completed.

A. Release of Sensitive Protected Health Information Under State Law

You must check “yes” or “no” if you authorize the release of medical information, test results, records or communications specific to (note: “yes” means this information is included in the categories you designate in Part B below) :

- Human Immunodeficiency Virus (HIV) or HIV/Acquired Immune Deficiency Syndrome Yes
- Sexually transmitted or “communicable” diseases (includes hepatitis, as well as venereal diseases); No
- Drug, alcohol or substance abuse;
- Mental health or developmental disabilities (including mental retardation or similar disabilities, for example, those attributable to cerebral palsy, autism or neurological dysfunctions); and
- Genetic testing.

Section III A. asks if the authorizing individual identified in Section I wants the receiving person/entity identified in Section II to receive **Sensitive** Protected Health Information (SPHI). SPHI are certain types of health information for which various states’ laws require extra protections. Either “**Yes**” or “**No**” must be chosen. In this example, Jane has agreed to let Suzy receive her SPHI.

B. Release of Protected Health Information (check one or more)

Dates of Services

From: To:

<input type="checkbox"/>	Health Plan Benefit Information:	Includes information contained in your benefit booklet (i.e., copayments, coinsurance, eligibility and other benefit information).	_____	_____
<input checked="" type="checkbox"/>	Claims Information:	Includes information related to payment of your claims for service you received, including pertinent information located on a claim form (i.e., billed amount, general procedure descriptions claim payment or denial reasons, etc.).	6-12-05	4-30-08
<input type="checkbox"/>	Service Determination Information:	Includes any information related to pre-service, concurrent and post-service decisions.	_____	_____
<input type="checkbox"/>	Premium (if applicable)	Includes information related to applicable billing cycles, bank draft changes, etc.	_____	_____
<input type="checkbox"/>	Services from (provider or supplier):	Provider name: _____ (Includes information related to services rendered by a specific provider or supplier.)	_____	_____
<input type="checkbox"/>	Other:	_____	_____	_____

(Specify other information that is not listed in one of the categories above.)

Section III B. asks for the specific types of information that the individual identified in Section I is authorizing BCBSNM to disclose to the person/entity identified in Section II. In this example, Jane is authorizing BCBSNM to provide her daughter with her claims information for the time period listed. “Dates of Service” means disclosing information for health care services the individual received during a particular time period. For example, in this case Jane Doe is authorizing BCBSNM to disclose claims information for health care services provided during June 12, 2005 through April 30, 2008.

IV. Expiration and Revocation:

Expiration: This authorization will expire on (must choose one):

- One year from the date it is signed
- Other (insert date or event): _____

Right to Revoke: I understand that I may revoke this authorization at any time by giving written notice to the address listed at the bottom of this form. **I understand that revocation of this authorization will not affect any action the above named entity took in reliance on this authorization before the above named entity received my written notice of revocation.**

Section IV. asks for the “expiration” date and a statement regarding the individual’s right to revoke. All valid authorizations must contain a specific expiration date or expiration event (e.g. “**hospitalization end date**”, “**rehabilitation end date**”, etc). In this example, the authorization will remain valid for a period of one year from the date it was signed, or until Jane revokes the authorization.

V. Signature (this document must be signed by the individual, parent of minor child or the individual's personal representative):

I understand that this authorization is voluntary and that the health plan cannot condition my eligibility for benefits, treatment, enrollment or payment of claims on the signing of this authorization. I understand that if I am signing on behalf of a minor child, this authorization will expire upon the child reaching the age of 18, unless there is proof of legal guardianship.

Jane Doe
Signature

12-30-08
Date: month/day/year

If you are signing as a Power of Attorney, Legal Guardian, Executor or Administrator complete the following and attach a copy of the Legal documents. You do NOT have to attach copies of these documents if they are already on file with Blue Cross and Blue Shield of New Mexico:

Personal Representative’s Name	Relationship to Individual
Personal Representative’s Address	City
Personal Representative’s Area Code & Telephone Number	State ZIP

Section V. requires the signature and date. In order to be valid, the authorization form must be signed by either the individual identified in Section I or the individual’s personal representative identified in Section V. If the individual is a minor dependent under the age of 18, a parent or guardian may sign the authorization form. A personal representative has received legal authority to represent the individual. In this case, since Jane is completing the form, there is no need for a personal representative to sign. If Jane’s personal representative were signing this authorization on her behalf, the personal representative must complete the lower portion of Section V and submit the proper documentation with the authorization form (if not already on file with BCBSNM).

**BEFORE SENDING AUTHROIZATION FORM
YOU SHOULD KEEP A COPY FOR YOUR RECORDS
BY EITHER:**

- (1) MAKING A PHOTOCOPY OF THIS SIGNED AUTHORIZATION; OR**
- (2) COMPLETING AND SIGNING THE DUPLICATE AUTHORIZATION FORM YOU RECEIVED OR PRINTED**

The final portion of the form contains some instructions to be followed prior to mailing the form to BCBSNM. Members are advised to keep a signed copy for their records.