

Appendix A - Accounting of Disclosures Request Form

Requestor

Name of Requestor _____
Address _____
Email _____
Phone _____

Request Personally Identifiable Information (PII) and Data About *:

Customer Name: _____
Customer ID: _____
Date Received _____
Written Request *Y/N* _____

Information Requested

Purpose _____
Requested Period _____
PII Disclosed _____
Financial Information Disclosed _____

Date Approved _____
Approved By _____
Date Disclosed _____
Disclosed By _____

Billing

Amount Billed _____
Amount Received _____
Date Received _____

*Consumer consent must be obtained before release of PII for non- Exchange operational purposes. To obtain/give consent, use Release of Information Authorization Form (Appendix A – 02.03.01 Authorized Use & Disclosure of PII).