# To obtain a copy of the Medicare Appeal case file, you must submit a completed Privacy Act Request Form.

# If you are the Medicare beneficiary, or represent the beneficiary as an attorney, family member, or friend, the beneficiary must complete and sign Form A.

# If you represent the beneficiary as the Legal Guardian, Power of Attorney, or Estate representative, you must complete and sign Form B and include the legal documentation that shows you are authorized to receive this information.

After you and/or the Medicare beneficiary complete and sign the appropriate form, you must send the form back to us at the following address:

MAXIMUS Federal Services - QIC Privacy

3750 Monroe Avenue

Suite 702

Pittsford, NY 14534



Medicare

Managed Care & PACE Reconsideration Project

# Reviewing

***Medicare Appeals***

MAXIMUS Federal Services

Medicare Part C QIC

3750 Monroe Ave, Suite 702

Pittsford, New York 14534

Tel: 585-348-3300

Fax: 585-425-5292

www.medicareappeal.com

## Who We Are

*We are MAXIMUS   
Federal Services. We are experts on appeals. Medicare hired us to review the file and decide if the health plan made the correct decision.* ***We work for Medicare.*** *We do not work for the health plan.*

*Cathleen MacInnes*

*Project Director*

*Medicare Managed Care & PACE Reconsideration Project*

**Do you need help?**

Call 1-800-MEDICARE (1-800-633-4227) for help or more information about what you can do in this case. TTY users should call 1-877-486-2048.

Upon receipt of this form, we will send a copy of the Medicare Appeal case file to you.

**Privacy Act Request Instructions**

The Privacy Act of 1974 gives Medicare beneficiaries or their authorized representatives the right to request a copy of their case files.

**Privacy Act Request Form (Form A)**

If you are:

* A Medicare beneficiary;
* An attorney representing a beneficiary in the appeal;
* An immediate relative representing a beneficiary in the appeal;

Then the attached **Privacy Act Request Form (Form A)** must be completed and signed by the beneficiary whose case is being requested.

**Privacy Act Request Form (Form B)**

If you are:

* A family member or representative of a deceased beneficiary or the beneficiary’s estate: *Documentation confirming legal authority to act on behalf of decedent must be presented.*
* An attorney representing a deceased beneficiary: *Valid authorization signed by an authorized representative of the deceased and documentation authenticating the authority of the signatory on the release authorization to represent the decedent’s estate must be presented.*
* Power of Attorney (POA): *A signed POA must be presented*.
* Legal Guardian: *Proof of guardianship must be presented*.

Then the attached **Privacy Act Request Form (Form B)** must be completed and signed by the Estate Representative, Power of Attorney, or Legal Guardian. Supporting documentation must be provided with Privacy Act Request Form (Form B).

**Privacy Act Request Form (FORM A)**

I have a case at MAXIMUS Federal Services. Please provide me with a copy of my case file.

My name is \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_­­\_\_\_\_\_\_\_\_\_

(Please print your name)

My date of birth is: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**My Medicare Appeal case file number is:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Please send a copy of my case file to:

Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Street: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

City, State, Zip Code: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

I certify that I am the individual named in this request whose records (which may include medical records) are being sought. I understand that a knowing and willful request for or acquisition of records pertaining to an individual under false pretenses is a criminal offense under the Privacy Act subject to a $5,000 fine. 45 Code of Federal Regulations Section 5b.5(b)(2)(ii).

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Signature Date

**Privacy Act Request Form (FORM B)**

Legal Guardian, Estate Representative, Power of Attorney

I am the Legal Guardian, Estate Representative, or have Power of Attorney for a Medicare beneficiary who has a case at MAXIMUS Federal Services. I am requesting a copy of this person’s case file.

**The Medicare case file number is**\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

The name of the Medicare beneficiary is: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

(Please print beneficiary’s name)

The Medicare beneficiary’s date of birth is \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

My name is: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

My relationship to the Medicare beneficiary is: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Please send a copy of the case file to:

Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Street: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

City, State, Zip Code: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

I certify that I am the Legal Guardian, Estate Representative or have Power of Attorney for the Medicare beneficiary named in this request whose records (which may include medical records) are being sought. I understand that a knowing and willful request for or acquisition of records pertaining to an individual under false pretenses is a criminal offense under the Privacy Act subject to a $5,000 fine. 45 Code of Federal Regulations Section 5b.5(b)(2)(ii).

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_

Signature (Legal Guardian, Estate Representative, or Power of Attorney) Date

**Please attach the documentation appointing you as the Legal Guardian, Estate Representative or Power of Attorney** of the above-named Medicare beneficiary. MAXIMUS Federal Services cannot provide you with a copy of the case file without the appropriate documentation that appoints you as the authorized person to receive this information.