ARASH LAW

WHAT TO REVIEW BEFORE SIGNING THE INSURER'S FORM

# Medical Records Release Worksheet

If an insurance company asks you to sign a form so it can get your medical records, put that form next to this worksheet. Look for which records it covers, who can get them, and when the permission ends.

**Use one row for each part you want to ask your lawyer about. Type in the boxes or print this page and write by hand. Use extra copies if you need more space.**

## Example if the form says “all dates”

Reference guide

| Field | Permission | Uncertainty | Question for Counsel |
|---|---|---|---|
| **Dates of medical records** | The insurer could request older records as well as recent ones. | I'm unsure why the insurer needs records from before the accident. | Can we limit the request to records related to this injury? |

## Your notes

Complete one row per clause

| **Field**<br>What part of the form are you looking at? | **Permission**<br>Who can get which records, or what else does this part allow? | **Uncertainty**<br>What's unclear or seems too broad? | **Question for Counsel**<br>What do you want your lawyer to explain or discuss changing? |
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**Checklist for your consultation:** Bring your notes, the insurer's form and request, any deadline the insurer gave you, and any medical records you already have when you speak with your lawyer.