



CONFIDENTIALITY PROTOCOLS UNDER ILLINOIS RULE 2028.5

Illinois Rule 2028, implemented and authorized by Section 355b of the Illinois Insurance Code (“Code”), guides companies in guarding against the disclosure of accident and health insurance claim and billing related information.

Effective March 9, 2015, Illinois Rule 2028, with respect to insurers regulated under the Insurance Law, including health maintenance organizations (“HMOs”), provides in relevant part that a health insurer, as defined in the Code, to effectively respond to and accommodate reasonable requests for receipt of claim and billing related information by alternate means or at alternative locations if the requestor clearly states that disclosure of all or part of the information could endanger the insured. As defined by the Rule, a “requestor” means an insured or the insured’s legal representative, or, with regard to an insured who is a child, the child’s parent or guardian. The request shall include a copy of a valid protective order.

Except with the express consent of the requestor, a health insurer shall not disclose to the policyholder: (1) the address, telephone number or any other personally identifying information of the insured or child for whose benefit a request was made; (2) the nature of the health care services provided; (3) the name of address of the provider of the health care services; (4) any other information from which there is a reasonable basis to believe the foregoing information could be obtained.

For more information on requesting these confidentiality protocols for your Sun Life policy, please contact Customer Service at 1-800-247-6875.

For your information, the phone number for the State of Illinois Domestic Violence Helpline is:

- 1-877-TO END DV or 1-877-863-6338 (Voice)
- 1-877-863-6339 (TTY)