

DISABILITY BENEFIT SPECIALIST PROGRAM MEDICARE COUNSELING CLIENT SERVICES AGREEMENT INSTRUCTIONS

The Disability Benefit Specialist Program Medicare Counseling Client Services Agreement (CSA) documents the nature of Medicare counseling and assistance the disability benefit specialist (DBS) has agreed to perform on the client's behalf. The form explains limitations regarding the DBS's enrollment counseling and assistance and the confidentiality standards by which the DBS must abide. The Medicare Counseling CSA may be used when the DBS is only providing benefits counseling or enrollment assistance with Medicare Advantage plans (Medicare Part C) and/or Medicare prescription drug plans (Medicare Part D). Use the [Disability Benefit Specialist Program Client Services Agreement \(F-02562\)](#) when providing additional benefits counseling services.

HOW TO COMPLETE THIS FORM

The DBS reviews the Medicare Counseling CSA with the client (and legal guardian, when applicable) prior to providing customer-specific benefit counseling or enrollment assistance. The CSA may be reviewed in person, through a virtual platform (for example, Zoom), or over the phone. The DBS is required to use a CSA for all DBS cases. The CSA is not required for general information or referral contacts.

Section 1: Scope of Services

1. Enter the ADRC's name.
2. Enter the client's name.
3. Mark the checkbox(es) next to the services the DBS is agreeing to perform at the time the CSA is being implemented. For option 2 indicate the client's chosen Medicare plan and the date that coverage will begin.

Section 2: Limitations

Review the limitations with the client.

Section 3: Confidentiality

1. If the DBS is employed by an ADRC with multiple DBSs, check the box and enter the name of the ADRC in the corresponding field to inform the client that all DBSs at the ADRC have access to their private information.
2. Review the confidentiality statements with the client.

Section 4: Signatures

1. Offer the client an opportunity to ask questions prior to signing the form.
2. If the client has a legal guardian, the legal guardian must sign the form. When possible, obtain signatures from both the client and the legal guardian.
3. Both the client (and/or legal guardian, when applicable) and the DBS sign the completed form.

4. If the client is not able to sign the CSA in person, the DBS may use one of the following alternatives:

- Complete the DocuSign version of this form, allowing the client to provide an electronic signature.
- Send the CSA to the customer via email, allowing the client to return the signed form as a scanned document or picture attached to an email message.
- Accept a client's verbal signature over the phone. Follow up with the client by mail, by email, or in person to obtain a signed CSA for the record.
- Accept a client's consent through an emailed statement after having discussed the CSA contents either by phone or email. Follow up with the client by mail, by email, or in person to obtain a signed CSA for the record.
- Mail the CSA to the client, allowing client to sign the form and return it by mail.

The DBS implements a new CSA whenever a client returns for additional services after their prior case has closed.