DISABILITY BENEFIT SPECIALIST PROGRAM
CLIENT SERVICES AGREEMENT INSTRUCTIONS

The Disability Benefit Specialist Program Client Services Agreement (CSA) documents the nature of services the DBS has agreed to perform on the client's behalf. The form explains the confidentiality standards by which the DBS must abide and the responsibilities of both the client and DBS.

HOW TO COMPLETE THE FORM

The DBS reviews the CSA with the client (and legal guardian, when applicable) prior to providing customer-specific benefit counseling or advocacy services. The CSA may be reviewed in person, through a virtual platform (for example, Zoom), over the phone, or by email. 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

- Enter the ADRC's name.
- Enter the client's name.
- Mark the checkbox(es) next to the services the DBS is agreeing to perform at the time the client services agreement is being implemented. For options 2, 3, and 6 specify the programs applicable to the client's case. For option 8, specify the additional activity and program, if applicable.
- Use the "Updated" column to document changes to the scope of services. Enter the DBS's initials and date the change occurred next to the appropriate service description(s).

Section 2: Confidentiality

- Review the confidentiality statements with the client.
- If the DBS is employed by an ADRC with multiple DBSs, check the box to inform the client that all DBSs at the ADRC have access to their private information.
- Document permissions the client has granted to share information about their case on a "need to know basis." Enter the name of the person, relationship of that person to the client, and the purpose for releasing information. For example, a client has asked the DBS to schedule appointments through their spouse. The DBS enters the spouse's name, the relationship, and the purpose (scheduling appointments) in the appropriate fields.

Note: the CSA is not a formal release of information. When needed, the DBS obtains signed releases of information as required by their ADRC's policy.

Section 3: Responsibilities of DBS and Client

- Review the responsibilities with the client.

Section 4: Signature

- Offer the client an opportunity to ask questions prior to signing the form.
- 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.

- Both the client (and/or legal guardian, when applicable) and the DBS sign the completed form.
- 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 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 as an email attachment.
  - 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 reviews the CSA with the client (and their legal guardian, when applicable) any time the scope of the services described in the current CSA change. Changes are indicated by entering the DBS's initials and date in the Updated field next to the line item that has changed. The CSA is reviewed annually if the case remains open continuously for more than eleven months.

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