

## Disability Benefit Specialist Program Summary of Brief Services and Closing Notice Instructions

Disability benefit specialists are required to use a client services agreement for all DBS cases. See Sections III.D and III.E of the [ADRC Operations Manual: Disability Benefit Specialist Program \(P-03062-05a, PDF\)](#).

The [Summary of Brief Services and Closing Notice \(F-02562A\)](#) is used when the client's benefit topic can be resolved in a single contact without the need for ongoing activity.

The [Disability Benefit Specialist Program Extended Services Agreement \(F-02562\)](#) (ESA) is used when you have agreed to assist your client with activities that cannot be resolved in one contact.

**A client services agreement is not required for a general information and assistance or referral-only contact.**

**How to complete the form:** Review the form with your client (and legal guardian, when applicable) prior to providing client-focused benefit counseling or advocacy services. This client services agreement (CSA) may be reviewed in person, through a virtual platform (for example, Zoom), over the phone, or by email.

### Introduction

1. Enter or print the date the services were provided.
2. Type or print your agency's name in the **Agency** field.
3. Type or print your client's name in the **Your name** field.
4. Type or print your name in the **My name** field.

### Section 1: How I helped you

1. Click or mark an "X" in the boxes next to the benefits counseling and advocacy services you performed for your client.
2. Type or print the appropriate activity or activities in the field next to corresponding benefit program. Valid activities are:
  - Explained benefits
  - Applied for benefits
  - Compared plan options
  - Completed a document(s)
  - Completed a renewal
  - Enrolled in a plan
  - Advocated for you
3. Type or print the outcome for the corresponding benefit program.

### Section 2: Important information about Medicare counseling (if applicable)

1. Check or mark an "X" in the box if you provided Medicare counseling to the client.
2. Review the statements with your client.

**Note:** It is allowable to use the [Summary of Brief Services and Closing Notice \(F-02562A\)](#) when a benefit specialist is performing any level of Medicare benefits counseling. The [Disability Benefit Specialist Program Extended Services Agreement \(F-02562\)](#) must be used if the benefit specialist expects the need for ongoing advocacy.

**Section 3: Your rights when receiving DBS services**

1. Review the rights and responsibilities statements with your client.
2. If you are employed by an agency with multiple disability benefit specialists, check or mark an "X" in the check box to the statement explaining confidentiality in multiple disability benefit specialist agencies. Type or print your agency's name in the appropriate field. Skip this subsection if you are not employed by an agency with multiple benefit specialists.
3. If your agency uses an electronic case filing system and someone other than you scans documents into the system, check or mark an "X" in the check box next to the statement about electronic files. Type or print your agency's name in the appropriate field.
4. If you are collecting documents that authorize another person to sign for or represent your client, explain the process for adding these documents to the reporting and case management system. Explain who can view the documents to the client. Check or mark an "X" in the check box next to the statement about storing documents in the reporting and case management system, and check or mark an "X" next to the document(s) that the client consents to adding to the statewide database.

**Section 4: Why your case is closed**

1. Review the statements with your client.
2. Type or print your preferred method of contact, phone number, and/or email address in the appropriate field.

**Section 5: Signatures**

1. Click or mark an "X" in the check box if you did not meet with the client in person. If the contact was not conducted in person, the client's signature is not required.
2. If the meeting was in person, type or print the name of the client and legal guardian (if applicable) in the appropriate fields. Type or print the date in the date signed field.
3. Ask the client and legal guardian (if applicable) to sign their name(s). 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.
4. Type or print your name in the benefit specialist's name field and sign the form in the appropriate field.
5. Provide a copy of the signed form to the client and legal guardian, if applicable. See Section III.E of the [ADRC Operations Manual: Disability Benefit Specialist Program \(P-03062-05a, PDF\)](#).