DISABILITY BENEFIT SPECIALIST PROGRAM
APPOINTED REPRESENTATIVE AGREEMENT INSTRUCTIONS

The Disability Benefit Specialist Program Appointed Representative Agreement is a client services agreement (CSA). It is used by the disability benefit specialist (DBS) to document the purpose for accepting appointed representative status and specify the estimated length of time the appointment will last. The form explains rights, responsibilities, limitations, and disclosures relevant to appointing a representative. It also describes the confidentiality standards by which the DBS must abide. This form is used in conjunction with the Disability Benefit Specialist Program Client Services Agreement (F-02562).

HOW TO COMPLETE THIS FORM

The DBS reviews the Appointed Representative Agreement with the client (and legal guardian, when applicable) prior to providing completing the Claimant's Appointment of Representative form (SSA-1696). The agreement may be reviewed in person, through a virtual platform (for example, Zoom), or over the phone.

Section 1: Scope of Services

1. Enter the ADRC's name.
2. Enter the client's name.
3. Enter the purpose for accepting appointed representative status. For example, to represent the client at a hearing regarding an overpayment claim.
4. Enter the estimated length of time needed for the appointment.

Section 2: Client's Rights and Responsibilities

Review the client's rights and responsibilities.

Section 3: Disclosures, Limitations, and DBS's Responsibilities

Review the disclosures, limitations, and DBS's responsibilities.

Section 4: 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 5: 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.