**DISABILITY BENEFIT SPECIALIST PROGRAM**

**Medicare Counseling Client Services Agreement**

The Disability Benefit Specialist Program provides information, assistance, and advocacy regarding public and private benefit programs to people between the ages of 18 and 59 identifying as having a physical disability, intellectual or developmental disability, mental health disorder, or substance use disorder. A disability benefit specialist (DBS) may provide benefit counseling services to youth transitioning from children’s services to adult services starting at age 17 years and six months. A DBS can counsel people regarding eligibility for benefit programs and may be able to assist in the application and/or appeal procedures for these benefits.

# Section 1: Scope of Services

The DBS of the Aging and Disability Resource Center (ADRC) of         
is authorized to provide the following services to       ,  
as indicated by a checked box(es) below.

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| --- | --- | --- |
| 1. |  | Help gathering information about Medicare coverage options using the Medicare Plan Finder tool at [www.medicare.gov](http://www.medicare.gov). |
| 2. |  | Help enrolling in the Medicare Advantage Plan (also known as Medicare Part C) or Medicare prescription drug plan (also known as Medicare Part D) specified below through the Medicare Plan Finder tool at [www.medicare.gov](http://www.medicare.gov) or by calling 1-800-MEDICARE. |
|  |  | 1. Medicare plan: 2. Date coverage begins: |

# Section 2: Limitations

The information provided by the DBS through use of the Medicare Plan Finder tool is an estimate based upon current market prices and information supplied by the client regarding their current medications. The DBS is not an insurance agent or broker and cannot recommend a specific Medicare plan.

The Medicare Plan Finder tool is a website managed by the U.S. Centers for Medicare and Medicaid Services (CMS). The DBS is not directly affiliated with the CMS, the Medicare program, or any provider contracted by CMS. The DBS cannot be held responsible for problems related to Medicare enrollment or coverage. The DBS may be able to help a client who is encountering problems related to Medicare enrollment or coverage exercise their rights under the Medicare plan.

# Section 3: Confidentiality

DBS services are confidential. The DBS will not disclose information about a client without the informed consent of the client, unless allowed by Wis. Admin code § DHS 10.23(2)2.

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|  | The ADRC of       employs more than one DBS. By signing this document, the client understands that all DBSs at this ADRC have access to the client’s information. |

By signing this document, the client understands that part of receiving DBS services involves the sharing of information between the DBS and their local supervisor, technical assistance provider, and the Wisconsin Department of Health Services DBS program manager for purposes of case oversight, data reporting, and quality assurance. The local supervisor, technical assistance provider, and the DBS program manager are bound by confidentiality and do not share client information with anyone other than the DBS without informed consent of the client.

# Section 4: Signatures

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| Client Name (Print or Type) | **SIGNATURE** – Client | Date Signed |
| Legal Guardian (Print or Type) | **SIGNATURE** – Legal Guardian | Date Signed |
| DBS Name (Print or Type) | **SIGNATURE** – DBS | Date Signed |