Fee Agent Training

Trainer's Guide

Division of Public Assistance
Field Services
Revised July 2011

Introduction

Provide an introduction of the fee agent process and the purpose of this training.

Objectives of Fee Agent Training

At the end of the training, the fee agent will have thorough understanding of the following:

1) The basic concept of the programs and services offered by DPA.
2) The responsibility of the fee agent to send the original and complete application to DPA.
3) The responsibility of the fee agent to complete and send the Fee Agent Interview Report Form (FA 1).
4) The responsibility of the fee agent to send all the supporting documents the applicant provided at the time of the interview and not to hold applications and wait for anyone to bring in any supporting documents.
5) The extent of the responsibility of the fee agent (The fee agent's job is complete after the complete application, FA 1, and other supporting documents are sent to the DPA office. If the applicant has any questions about their application or benefits, they would need to call the local DPA office handling their case).
6) The process of completing the Monthly Fee Agent Billing Report (FA 48) form and how to bill the agency for payment.

Pre-Training Reminders

Before providing the training, ensure fee agents have completed the Fee Agent Provider Agreement and the Sub form W-9 (if needed), and received the fee agent training materials.

Note: Sub form W-9 is needed only if the individual is an employee of an organization that signed a fee agent contract with DPA and the employee is acting in a fee agent capacity for that agency.

Fee Agent Basics

Using the Fee Agent Manual as a guide, review the following information with the fee agent:

- Fee Agent Application, Fee Agent Update form, Fee Agent Provider Agreement.
- Using the Fee Agent Manual
- Role of fee agents in DPA (Chapter 1)
- Duties and Responsibilities of the Fee Agent (Chapter 2 / Refer also to: FS MS 601-2G)
- Client relations and confidentiality (Chapter 2.1 – 2.2)
- Interviewing the applicant (Chapter 3)
- Completing the FA 1 form (Chapter 3.5 and Appendix E)
- Requirements for verifying information (Chapter 4)
- List of district offices (Appendix A)
- Definitions of commonly used words (Appendix B)
- Forms and supplies list (Appendix D)
- Fee agent billing form (Appendix F)

DPA Programs

- Provide a brief overview of the programs DPA administers (use Chapter 5 and program information in the Gen 50B for reference)

Application for Services (Gen 50B)

- Go through the sections of the Gen 50B using Appendix C - Guide to the Application for Services, or provide the following:
  - Clearly explain to the applicant the programs offered by DPA. The programs are listed on the front page of the application. Ensure that when an applicant checks the program, it is the kind of help they need. Explain to the client the difficulty caseworkers go through when applicants check all the programs.
  - Applicant address, phone number, and message number are very important.
  - List everyone living in the household. Include SSN for those who need benefits.
  - Signature(s) are needed on the application, Statement of Truth, and Authorization for Release of Information.

- Go over the Rights and Responsibilities page especially the fair hearing section.
- Completing the Fee Agent Interview Report (FA 1) form during the interview and not after the interview.

Denali KidCare Application (Gen 132)

- Explain the purpose of Gen 132 and the difference with Gen 50B; Gen 50B is acceptable for DKC but Gen 132 is not acceptable for other programs.
- No resource consideration
- No interview is needed for this application

Senior Benefits Application (Gen 152)

- Explain the purpose of Gen 152 and the difference with Gen 50B; Gen 50B is not acceptable for Senior Benefits and Gen 152 is also not acceptable for other programs.
- No resource consideration.
- No interview is needed for this application.

Reviews and Recertifications (Gen 72)

- Explain the requirement to complete a Fee Agent Interview Report (FA 1) form when assisting applicants with their review or recertification
- Ensure the client signs the Statement of Truth and Authorization for Release of Information.
- Mention that Medicaid reviews do not require an interview (including Transitional Medicaid reports)
- Inform the fee agent that if the client receives more than one Gen 72 in the same month, the client needs to complete only one for the all the programs requiring a review. Also mention that the fee agent should only complete one FA 1 form.

Viewing and Verifying Documents for Medicaid

- Explain the requirement for fee agents to use the green stickers when viewing and verifying citizenship and identity documents for Medicaid.

Voter Registration

- Instruct fee agents on their responsibility to offer voter registration when assisting applicants with their application, review or recertification.

Changes

- Instruct fee agents to have clients call their caseworker to report changes.
- Inform fee agents of the availability of Report of Change form (Gen 55) and pamphlet (Gen 93) if clients want to report changes in writing.

Quest Card

- Ensure the fee agent has a copy of the Quest Card brochure (on e-forms)
- Review the Quest Card pamphlet

Direct Deposit

- Ensure the fee agent has a copy of the Direct Deposit brochure (on e-forms)
- Review the Direct Deposit pamphlet

Interpreter Service

- Inform fee agents of the availability of the interpreter service provided by DPA (effective 9/1/09, interpreter service is through InSync Interpreters).

Client Question:

- Instruct fee agents to have clients call the local office's main line if they have questions about any of the programs or their case. The client will be connected to the appropriate functional team.
- Inform fee agents not to become advocates for clients, not to try to explain the policy, and not to get in the middle of the issue.

Successful Interview Tips

Provide fee agents with tips on how to conduct a successful interview, such as:

- Using open-ended questions to get more information from applicants about their current situation and prior support.
- Using the Fee Agent Interview Report (FA 1) form while conducting the interview
- Using the Guide to the Application for Services (Gen 50B) – Appendix C to review the information applicants need to provide in the application.

Questions and Answers

- Encourage fee agents to ask questions and clarify information they did not understand.
- Provide fee agents with contact names and numbers for billing questions and policy/process-related questions.

Other Suggestions (optional or whenever appropriate)

- Hold mock interviews or role play to familiarize fee agents in conducting interviews and completing the FA 1 form.