Fee Agent Training

Trainer's Guide

Division of Public
Assistance Field Services

Revised June 2017

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, sign and submit 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 to submit a completed Fee Agent Interview Report (FA 1) after the interview and other supporting documents to the DPA office. If the applicant/recipient 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.
7. The requirements to be certified as a fee agent. (Must complete the Fee Agent Application, have a signed and valid Fee Agreement Provider Agreement on file and complete the Fee Agent training provided by DPA).
8. The importance of the fee agent not to permit anyone to complete, sign, and submit the Fee Agent Interview Report (FA 1) or Fee Agent Monthly Billing Report form (FA 48), or interview the applicant listed on the form on their behalf. Only a certified fee agent can complete, sign, and submit those forms.

Pre-Training Reminders

Before providing the training, ensure fee agents have completed the Fee Agent Application (FA 50), the Fee Agent Provider Agreement (FA 33), the Substitute Form W-9 (if needed), and received the fee agent training materials.

> ***Note:*** *The* Substitute Form W-9 *form is required for all individuals who will receive compensation as fee agents from the Division of Public Assistance.*
>
> *If the individual is an employee of an organization that signed a fee agent provider agreement with DPA and the employee is acting in a fee agent capacity for that agency, it is the agency that will need to complete the Substitute Form W-9. This form is located online at: http://doa.alaska.gov/dof/forms/resource/sub_form_w9.pdf*

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
- Role of fee agents in DPA (Chapter 1)
- Duties and Responsibilities of the Fee Agent (Chapter 2)
- Client relations and confidentiality (Chapter 2.1 – 2.2)
- Interviewing the applicant (Chapter 3)
- Completing the FA 1 form (Chapter 3.5 and Appendix D)
- Requirements for verifying information (Chapter 4)
- List of district offices (Chapter 5 on the DPA website)
- Definitions of commonly used words (Appendix A)
- Forms and supplies list (Appendix C)
- Fee agent billing form (Appendix E)

DPA Programs

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

Application for Services (Gen 50C)

- Go through the sections of the Gen 50C using Appendix B - 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.

Heating Assistance Application (HAP 1)

- Explain the State's Heating Assistance Program accepts applications from October 1 to April 30. Households with an elder or disabled person may apply in September. Benefits aren't issued until November 1.
- Clients must physically reside in the property they are requesting assistance at.
- Clients must have a minimum of $200 a year in out-of-pocket heating costs and be able to provide receipts verifying these costs.
- Open to renters and homeowners.
- No resources considered.
- One benefit per season paid directly to the heating vendor.
- Explain that it is important that the application is completed in full:

- All 40 questions should be answered to the best of their ability.
- The application must include social security numbers, dates of birth, and citizenship/ethnicity for each household member.
- The program requires a copy of the latest home heating and electric bills to be submitted with the application.
- The program needs a copy of the head of household's ID (can include a social security card, state ID card, state driver's license, BIA card, tribal enrollment card, or other official government ID).
- Please include proof of all income from all members of the household for the month prior to the date the application is signed. For example, if the application is signed on October 2, the program would need proof of September income.

- Please make sure the client is completing the correct application. Heating Assistance is administered by the State and 13 Tribal organizations. If you are unsure of who administers the program in your area, please check the Heating Assistance website at: http://dhss.alaska.gov/dpa/Documents/dpa/programs/hap/Community-Points-Listing.pdf.
- Information on the Heating Assistance Program can be found online at: http://dhss.alaska.gov/dpa/Pages/hap/resources-fee-agent.aspx.

Senior Benefits Application (Gen 152)

- Explain the purpose of Gen 152 and the difference with Gen 50C; Gen 50C is acceptable for Senior Benefits however the Gen 152 is 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.
- 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.

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.

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.
- 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 50C) – Appendix B 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.