

WSC ADVISORY #2026-010
THE ROLE OF THE CLIENT ADVOCATE

ACTION REQUIRED

EFFECTIVE DATE: MAY 19, 2026

This advisory is intended to assist Qualified Organizations (QOs), Waiver Support Coordinators (WSCs), and Consumer-Directed Care Plus (CDC+) Consultants in understanding the role of the “client advocate.”

Per the Medicaid Waiver Services Agreement, WSCs, CDC+ Consultants and QOs shall “...[n]ot use or disclose any information concerning a client receiving services under this Agreement for any purpose prohibited by state or federal law or regulation, except with the written consent of a person legally authorized to give that consent or when authorized by law...”

A “client advocate” means a friend or relative of the client, or of the client’s immediate family, who advocates for the best interests of the client in any proceedings in which the client or his or her family has the right or duty to participate. § 393.063(8), Florida Statutes.

A “client advocate” is not the same as a “guardian advocate”. A “guardian advocate,” as the term is utilized in section 393.13(h), refers to a person who has been appointed by the circuit court through the process outlined in section 393.12, Florida Statutes, and who has been granted rights to act on behalf of the person with a developmental disability.

With the permission of the client/legal representative, a client advocate may receive information or participate in any meetings with the client/legal representative. However, no confidential information should be shared with a client advocate unless the client or their legal representative has signed a release specifically identifying the information related to the client that the advocate is authorized to receive. APD consent forms are available here: [Consent to Obtain or Release PHI](#).

Alternative release forms may be utilized if they meet all the requirements of [45 CFR 164.508\(c\)](#). If a QO or WSC/Consultant receives a release in an alternate format, please contact the APD Regional office for assistance.

An advocate, who is not the legal guardian/representative or a court appointed guardian advocate, does not have authority to make decisions on behalf of the client. Directives or decisions coming from an advocate should not be followed unless the client or legal representative has confirmed their agreement to the intended course of action.

Advocates can be a valuable resource for clients. However, they are not a substitute for the participation and decision making of the client and their legal representative. At no point in time should your communication go solely to the advocate. Clients, their legal representatives, and their waiver support coordinators or CDC+ consultants should continue to be included in all communications.

When the WSC becomes aware of a client advocate, the iConnect Contacts tab must be updated and the signed release must be uploaded as an attachment to a Note. For detailed instructions on how to document the client advocate in iConnect, refer to the new [Adding Legal Representative and Client Advocate in iConnect Job Aid](#) on the APD website.

For questions, please contact the APD Waiver Liaison in your Region.