

## Benefit Planning Services from Imagine Enterprises

**If you need assistance and wish to contact Imagine for additional support**, here is the process and fees that we use to provide our services:

- 1.) The first consultation is free and includes the initial intake, instructions to obtain the Benefits Planning Query (BPQY) and next step ideas for the beneficiary. If needed, Imagine staff will review resources to assist the person and family to obtain additional benefit planning services.
- 2.) If an active case with Texas Workforce Services-Vocational Rehabilitation Services (TWS-VRS), request benefits planning services in the Individual Plan for Employment (IPE). Or,
- 3.) Initiate a referral to the local TWS-VRS to determine eligibility for services. Complete the intake process and develop an Individual Plan for Employment (IPE) with a work/earnings goal. Once completed TWS-VRS will send a benefits referral to Imagine Enterprises. Or,
- 4.) A private fee-for-service arrangement can be arranged, using the same fee schedule that is used with the TWS-VRS services.

How to get in touch with Imagine Enterprises' Benefits Planning Team:

- a) Contact Sandy Hardy Smith @ Toll-free: 888.437.4213 ext. 2
- b) Fax a referral to 866.950.2948
- c) Send a referral email to [Imagine.SandyHS@gmail.com](mailto:Imagine.SandyHS@gmail.com)

<b>Fee for Service with TWS-VRS Work Incentive and Planning Assistance Services</b>	<b>UNIT RATE</b>
<b>Benefits Information and Referral (Benefits I&amp;R).</b> A written document that includes general information about <b>your benefits</b> .	<b>\$75</b>
<b>Benefits Summary Analysis /Work Incentive Plan (BSA/WIP).</b> A comprehensive written document containing a complete analysis and of current information and activities necessary to achieve employment outcomes with dates and timeframes.	<b>\$275</b>
<b>Revision to BSA/WIP.</b> Amendments to submit to Social Security after accepting job offer.	<b>\$100</b>
<b>Plan to Achieve Self-Support (PASS).</b> Completion of the Social Security Administration application (SSA Form 545) with supporting documentation for this work incentive.	<b>\$250</b>

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<p><b>Impairment Related Work Expense (IRWE).</b> A written document that details the type and amount of IRWE being requested each month, and copies of all accompanying documents that support the IRWE request.</p>	<p style="text-align: center;"><b>\$100</b></p>
<p><b>Student Earned Income Exclusion (SEIE).</b> A written request and accompanying documents to the Social Security Administration to consider specific earned wages for eligible students to be excluded from SSI resources.</p>	<p style="text-align: center;"><b>\$50</b></p>
<p><b>Blind Work Expense (BWE).</b> A written document that details the type and specific amounts of BWE being requested each month, and copies of all accompanying documents that support the BWE request.</p>	<p style="text-align: center;"><b>\$100</b></p>
<p><b>1619(b).</b> A written document that details earnings, work incentives and other actions to obtain 1619(b) status and retain Medicaid eligibility the Social Security Administration and The Health and Human Services Commission.</p>	<p style="text-align: center;"><b>\$50</b></p>
<p><b>Medicaid Buy-In (MBI).</b> A 19-page completed Health and Human Services Commission/ Medicaid for Elderly and Persons with Disabilities application (HHSC Form H1200 –MBI) and copies of all accompanying documents that support the MBI application.</p>	<p style="text-align: center;"><b>\$100</b></p>
<p><b>Subsidy.</b> Completion of the Social Security Administration application (SSA Form 3033) with supporting documents.</p>	<p style="text-align: center;"><b>\$100</b></p>
<p><b>Unsuccessful Work Attempt (UWA).</b> Completion of the SSA- 821-BK Work Activity Report – Employee or SSA-820 Work Activity Report – Self Employed Person and copies of any accompanying documents that support the UWA request.</p>	<p style="text-align: center;"><b>\$100</b></p>
<p><b>Property Essential to Self-Support (PESS):</b> Documentation that details business or personal property needed by the employee to not count against eligibility for Supplemental Security Income.</p>	<p style="text-align: center;"><b>\$75</b></p>
<p><b>Childhood Disability Beneficiary - also known as Disabled Adult Child (CDB/DAC).</b> Detailed documentation on steps to request CDB/DAC benefits are activated with the Social Security Administration, the Health and Human Services Commission and, if applicable, with the individual’s Home and Community Based Waiver program.</p>	<p style="text-align: center;"><b>\$25</b></p>