Imagine Enterprises Benefit Planning Services Referral Guide

This is the list of everything that is required in order to complete benefit planning in a timely manner.

PLEASE SEND ALL REFERRALS to the email address [benefits.counseling@imagine-enterprises.org](mailto:benefits.counseling@imagine-enterprises.org)

\*\*Referrals cannot be accepted without the following, submitted as a complete packet.

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| * TWS form titled Benefits Work Incentives Planning Referral form VR1512 (may not contain any blank fields.)   We need contact information, a run-down of benefits, employment goals, SSN, DOB and who best to contact (if parent or rep payee), any special notes such as hearing impaired, Spanish speaking family etc. |
| * A recent (within the last 90 days) BPQY- A BPQY is a record from SSA, BPQY is short for Benefit Planning Query. It is form SSA-2459 and we must have this form to complete benefit planning. |
| * Please include the service authorization detailing which services you are requesting. SA must be for at least 60 days duration and may not contain any blank fields. SA must include Imagine contract number 3023VRS036. |
| The following are NOT required but are very helpful to benefit planners if you have or can get them. |
| * Therequired SSA-3288 BPQY form (attached) signed by the customer.   Although the BPQY is provided with the referral, we need to have the consent form signed for Imagine so that if we need to call SSA and ask questions about the BPQY, they will have signed permission to share information with us.  We need BPQY consent completed for Imagine CWICS. Consents completed for VR counselors or other agencies will not work for Imagine CWICS. |
| * HHSC form 1826 case information release for anyone who receives Texas HHS benefits such as, SNAP food benefits, TANF cash help, State health care and support services such Medicaid, Medicaid Buy In, Medicaid Waiver programs or WIC food benefits. |

Any information you may have regarding other federal, state and local benefits (SNAP, HUD, VA, QMB/SLMB etc.) is also extremely helpful. Including any information, you may be able to provide about their Medicare/Medicaid.

The Process:

We must have the BPQY with the referral. Some counselors are able to utilize the SMURFS in your office to pull them and some counselors have the customer request it from SSA themselves (Beneficiaries can request a BPQY by contacting their local office or calling 1-800-772-1213).  

Once the referral packet with BPQY is received at ([benefits.counseling@imagine-enterprises.org](mailto:benefits.counseling@imagine-enterprises.org)) and verified, we typically call the customer to complete the initial intake.  We normally do not "meet" with the customer in the traditional sense. We have CWICS who serve SSA beneficiaries all over the state, so we typically do everything via phone, snail mail, email etc. Because of this we ask that you please let the customer know who we are, what we're going to be calling them about and make sure they're aware to pick up or return our calls.

During the intake interview, we gather and verify all necessary background information…what the customer receives, what work goals they have and explain their benefits. We also explain work incentives that may be available to them and the services we provide. We then put all of that information in writing (BSA/WIP) and mail it to them along with sending a copy to the VR counselor and/or RST. From this point services may continue indefinitely based on beneficiaries' needs.

Thank you for choosing Imagine Enterprises. Please let us know if you have any other questions or if we can be of any assistance. We look forward to working with you.

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