



Self-Employment Referral Checklist

This checklist acts as your roadmap for navigating the self-employment referral process. It highlights the steps and required forms to streamline submissions and ensure that we provide outstanding service to our shared customers.

- All referral packets must be emailed to ashley.nichols@imagine-enterprises.org to prevent delays. Ensure all required documents are included, as incomplete packets cannot be processed per TWC-VRS policy.
- Imagine Enterprises will provide feedback on referrals, which may include confirmation, requests for more documentation, or the return of incomplete packets.
- To ensure service continuity, please issue subsequent service authorizations within two weeks from the date that we submit the previous invoice.

Benchmark 1:

1. Must include a complete copy of the most recent version VR5000(02/23) in pdf format. All blanks must be filled in or marked N/A.

- Referral For: Self-Employment
- Provider Name: Imagine Enterprises
- Provider Email: ashley.nichols@imagine-enterprises.org
- Provider Phone: 888-437-4213
- Provider Fax: 866-950-2948
 - *Please include any accompanying documentation such as medical or psychological reports, case notes, vocational testing, or employment data..*

1. Must include a service authorization for the VR1801 - Customer Profile and Self-Employment Exploration in the amount of \$322.

- *The end date should be at least one month from the start date.*

Benchmark 2: Must be received within two weeks of the invoice for the VR1801.

1. Must include a service authorization for the recommended VR1802 - Concept Development and Feasibility Study.

- VR1802 - Concept Development and Feasibility Study- Simple (\$781)
- VR1802 - Concept Development and Feasibility Study- Comprehensive (\$1,286)
 - *The end date should be at least one month from the start date.*

Benchmark 3: Must be received within two weeks of the invoice for the VR1802.

1. Must include a service authorization for either:

- a. VR1803 - Self-Employment Simple Business Plan (\$919) or
- b. VR1804 - Self-Employment Comprehensive Business Plan (\$1378)

2. Must also include a service authorization for either:

- VR1805-2 Self-Employment Financial Projections Spreadsheet-Simple (\$322)
- VR1805-2 Self-Employment Financial Projections Spreadsheet-Comprehensive (\$551)
 - *The end date should be at least one month from the start date.*

Notes:

- All referrals must be sent to ashley.nichols@imagine-enterprises.org. Any referrals or inquiries sent to different email addresses will experience delays.
- The CBTAC will determine if the business qualifies for simple or comprehensive services.
- Referrals require a complete set of necessary documents to proceed through each stage.
- To provide excellent customer service, please issue the next service authorization within two weeks of the invoice date.
- We will follow up on outstanding paperwork up to three times. If there's no response after that, we will close the case. This policy helps us ensure timely and efficient service.
- Please feel free to reach out to ashley.nichols@imagine-enterprises.org and/or g.santarelli@imagine-enterprises.org with any questions.