



**Health Insurance (Check all that apply):**  Medicaid  Medicare  TriCare  
 Other (Employer, Private, ACA)  None

**Home and Community Based Services Waiver:**  HCS  TxHmL  CLASS  DBMD  
 MDCP/STAR Kids  STAR+PLUS HCBS  YES  MH Adult 1915i  STAR+PLUS Pilot  
 None

**Is the customer:**

U.S. Citizen?		If No, Legal Resident?		Full time student?	
Yes	No	Yes	No	Yes	No

**Benefits and Work Incentives Planning Supports and Services Requested**

**Check all that apply:**

- Benefits Information & Referral – Only Title II and/or SSI (IPE not required)
- Benefits Summary Analysis and Plan/Work Incentive Plan – Only Title II and/or SSI with IPE
- Veteran’s Benefits Summary and Analysis/Work Incentive Plan – Only Title II and/or SSI with IPE
- Revised Benefits Summary and Plan/Work Incentive Plan – Only Title II and/or SSI who have accepted job and hours/earnings are different than in original BSA/WIP
- Veteran’s Revised Benefits Summary and Plan/Work Incentive Plan – Only Title II and/or SSI who have accepted job and hours/earnings are different than in original BSA/WIP

**Federal Work Incentive Program(s)**

**Check all that apply:**

Supplemental Security Income (SSI)

- Student Earned Income Exclusion (SEIE)
- Impairment Related Work Expense (IRWE)
- Blind Work Expense (BWE)
- Property Essential to Self-Support (PESS)

Title II Disability

- Impairment Related Work Expense (IRWE)
- Subsidy/Special Condition

SSI and/or Title II Disability

- Plan to Achieve Self-Support (PASS)

Any Customer (no SSA benefit needed)

- Medicaid Buy-In

**Additional Comments**

**Enter specific information needed and/or additional comments, if any:**