

Guide to Allowable Work-Related Expenses

First, document the monthly costs you incur while working. Once you produce evidence of those, we can reimburse you **automatically whenever we receive Ticket payments because of your work earnings.**

Categories of Expenses

Transportation - Work support payments can be used for taxis, Uber/Lyft, paying someone to drive you, or the cost of public transportation to get you to and from work. **To pay for the use of a personal vehicle you need to have your car designated as an Impairment Related Work Expense (or IRWE).** We believe more than 90% of TakeCharge clients will qualify to use their personal car. You will be able to use your car if a health care professional familiar with your disability confirms that public transportation does not make sense for you (either too far away or other obstacles to using it).

To obtain the documentation needed, we suggest you send an email to a health care provider familiar with your disability. It could be your doctor, nurse, physical therapist, dentist, dietician, chiropractor, speech therapist, mental health counselor or other registered or licensed health care professional. Once they respond, please forward their email to TakeCharge and include an estimate of the number of miles you travel each month for work.

You will find a sample email you could send to your health care professional at the end of this Guide.

We can reimburse you 53.4 cents per mile that you travel for work. So, for example, if you drive 18 miles a day, we can reimburse you (18 miles X 53.4 cents)

or \$9.61 per day. If you are making that trip 22 times a month, we can pay \$9.61 X 22 = \$211.46 per month.

Child Care - Child care is an allowable expense during the hours that you are at work. If you take your children to a child care facility, a copy of their monthly invoice will do. If you pay a private individual, a handwritten receipt from them will be enough. You will find an example of a handwritten receipt that you can use at the end of this Guide.

Small Business Expenses - or Participating in the gig economy - If, in addition to your regular job, you plan to pick up extra money from Uber driving, pet sitting, tutoring, web site design, baking, babysitting, renting out a room of your house, selling items on eBay, or any of the many ways people supplement their income, TakeCharge can help cover these small business expenses. Examples of such expenses include: your monthly cell phone and Internet bill, website hosting charges, rent on your work space, office supplies and marketing. Other common expenses that are not monthly include a computer, software, supplies used in your business effort, payments to business advisors, etc.

Just let us know what type of small business that you are engaged in, or plan to engage in. Start by giving us receipts for the **monthly** expenses associated with it. Send in the additional one-time receipts when you can.

Personal Care Assistance - Personal care services are:

“...those forms of assistance which help a person with a disability meet his or her essential needs at home or at work, such as bathing, toileting, dressing, cooking, eating, communicating, traveling to and from work, and similar personal needs. Attendant care services can include services provided to help a person with a disability in performing the functions of his or her job, such as a reader or a job coach.” (Social Security Program Operations Manual DI 10520.010)

If you use a professional service, one of their monthly receipts will do. Personal care assistance can also be provided by a friend, neighbor or family member - but it must be help that you pay for. A hand-written receipt can be provided for such services. See sample at the end of this guide.

Educational or Vocational Training - Don't just think about conventional college courses. Be creative with your work support payments. If you take a job at a restaurant as a cashier but want to become a shift supervisor and need to understand the employer's software system, you could privately pay another employee to teach you. Preparing for advancement at your current employer or toward your long-term employment goals are eligible expenses. Any educational efforts that might help you perform more effectively now or in the future qualifies. If you sign up for any of the thousands of free vocational/educational courses offered online, it can justify payment for your monthly Internet charges or a new computer to access the training. Start with any monthly charges such as Internet access and document that with a receipt or invoice. Give us evidence that you've signed up for some type of educational experience. Costs of short-term tutoring or a new computer or software will go under one-time expenses. On-going educational expenses can go under monthly expenses.

Regularly Occurring Health Care Expenses (co-payments for prescriptions, therapy appointments, medical supplies, etc.) We need a copy of your prescription or invoice, or just the receipt with the items printed or handwritten on it. Medical costs that are not re-occurring can be submitted as one-time expenses.

Disability related accommodations at work or home – If you need grab bars put in your bathroom due to balance concerns, or a special mattress due to your back problems, or a ramp installed to make access to your house easier, a vehicle

modification, a standing desk, or a service animal, all of these expenses can be paid for with work support payments. They are allowable even though they may help you function more effectively at home as well as help you prepare to function more effectively at work.

Mandated uniforms that are not covered by your employer – Most employers will cover mandated uniforms. However, some will have unofficial uniforms such as black pants and a white blouse. If you do not have such items of clothing they can be paid for with work support payments.

Sample email for use of your car:

Dear ____ (health care professional)

I, ____ (your name) _____, am eligible for work support payments toward the use of my car to travel to/from work provided my car is considered an "Impairment Related Work Expense" To qualify for that designation, I need a health care professional familiar with my disabling condition to verify that, in their opinion, public transportation is too far from me, or there are other obstacles to my using it.

Since the closest public transportation that can get me to my job is ____ miles from my home, would you agree that walking ____ miles to/ from a bus or train each day would be difficult for me?

(alternatively describe other reasons that you find public transportation difficult to use and ask your health care provider to confirm).

Please respond to this email with your answer. Please provide your name and health care specialty.

Thank you for your help.

Sincerely,

Melinda Woods

Sample Handwritten Receipt for child or personal attendant care or other service provided by a private individual:

Mary Sue Anderson
123 Miller Ave
Boston, MA

Receipt for Child care provided from July 1, 2017 to July 31, 2017 --- \$1,200

Please note that there are maximum payment amounts that AAATakeCharge can make to you. See Chart below. If you have submitted monthly receipts that match or exceed the allowable amount, we will not need further documentation. If you have not reached your limit with monthly expenses, don't worry. You can submit one-time expenses as they occur.

AAATAKECHARGE PAYMENT AMOUNTS FOR 2017

<u>PAYMENT TYPE</u>	<u>PAYMENT PHASE</u>	<u>BENEFICIARY EARNINGS REQUIRED AFTER TICKET ASSIGNMENT</u>	<u>SSI TICKET HOLDER</u>	<u>SSDI TICKET HOLDER</u>
OUTCOME	OUTCOME 1 - 12	SSDI AND SSI NOT PAYABLE TO THE INDIVIDUAL DUE TO THEIR WORK EARNINGS MEETING OR EXCEEDING \$1,170 PER MONTH FOR NON BLIND (\$1,950/MONTH FOR BLIND)	UP TO 12 PAYMENTS OF \$245/MONTH	UP TO 12 PAYMENTS OF \$425/MONTH
	OUTCOME 13 AND FORWARD		UP TO 48 PAYMENTS OF \$145/MONTH	UP TO 24 PAYMENTS OF \$325/MONTH
		TOTAL OUTCOME PAYMENTS	\$9,900	\$12,900

NOTE: This Payment Chart is subject to change without notice in the event that the Social Security Administration changes the Ticket to Work Program.

Revised 11/22/2016

Instructions for submitting receipts via email

- Please send an email to takecharge@worksupportpayments.com. Put **EXPENSES for (your name)** in the Subject Line. Take clear photos of receipts or invoices with your cell phone (or the cell phone of a friend) and attach those photos to your email.
- In the body of the email tell us the total **MONTHLY** expenses you are submitting and/or list any **ONE TIME** expenses.

If it is easier for you to mail this paperwork to us, please send it to :

AAATakeCharge

14526 Jones Maltzberger, Ste 203

San Antonio, TX 78247

Phone: 1-866-701-1700

Email: takecharge@worksupportpayments.com

Website: www.aaatakecharge.com

If you have questions about these requirements, please call our office at 1-866-701-1700, Monday through Friday from 8:30 am to 4:00 pm CST. You can also email us at takecharge@worksupportpayments.com.

Thank you for helping us comply with these regulations. We want to keep your payments coming as much as you do. But we can only do that if together we demonstrate that we are following Social Security's rules.

Sincerely,

Kristen Salazar

Director of Operations