

San Francisco Culinary, Bartenders & Service Employees Legal Services Fund

Administrative Service Provider:

EXEMPLAR Legal & Benefit Administrative Services, LLC

Professional Administrative Services for Benefit Plans

Treat Towers, 1255 Treat Boulevard, Suite 300, Walnut Creek, CA 94597

Admin Office: (925) 680-8890 | Fax: (877) 761-4316 | Attorney Referral: (800) 604-0999

Eligibility: www.exemplarlegal.com | Claims: staff@exemplarlegal.com | Office: elbas@exemplarlegal.com

Adopted: 01-Jan-1998
Effective: 01-Jun-2024

TRANSACTION CODE SCHEDULE

000100-900000 Legal Benefits

Description: This Transaction Code Schedule is effective June 1, 2024. Effective April 1, 2024, approved Panel Attorneys are paid at \$250 hourly rate for claims authorized after March 31, 2024. Previous Transaction Code Schedules and applicable Panel Attorney hourly rate will be in effect for all benefit claims and Panel Attorney work commenced prior to April 1, 2024. Only professional services and Legal Plan benefits specifically identified in this Transaction Code Schedule are covered and will be approved for authorization of a Legal Plan claim and payment and pursuant to the terms and conditions of the Legal Plan. **Benefits are not reinstated annually.** Approved Panel Attorneys agree to accept the maximum benefit and shall not charge the Plan Participant additional professional fee(s) for covered benefits regardless of if the maximum benefit is exhausted. Approved Panel Attorneys agree to **submit Plan approved claim processing forms prior to commencement of services** and are required to provide the Fund with **timely monthly Legal Plan statement and itemized invoice forms for each authorized claim until completion of the matter.** All Legal Plan claim processing and payment forms are available at www.exemplarlegal.com and submitted via www.exemplarlegal.com secure Dropbox for processing. Out of date, scanned, handwritten, incomplete, or erroneous information on Plan forms and Dropbox field tabs will be rejected. Plan forms or required documents will not be accepted by facsimile or email due to unsecure transmission and participant/attorney confidentiality. Monthly Plan statement and invoice forms are required to be submitted by the 3rd business day of each month to be included in the monthly benefit payment cycle. The required Plan invoice form must identify service dates, time increment for each service date, and description of service for each billable entry. Only one (1) billing month will be accepted on a statement and invoice. A letter explaining exceptional circumstances is required for untimely submittal of monthly statements. Reimbursement to a Participant is not allowed except for covered benefits under benefit code series 600000. For reimbursement, a paid receipt that clearly identifies date paid, amount, and Participant name is required and to be submitted via Plan Dropbox. Under no circumstances will reimbursement be paid to a Participant or claim approved Panel Attorney if the Panel Attorney did not render or represent covered benefit service for Participant or if Participant was ineligible on the date the filing fee was paid. **The statute of limitation for reimbursement is 1 year from date of receipt.** Monthly benefit payments will be released on the 15th business day of each month. Please allow 5-10 business days for U.S. Postal Service delivery. Two claims for the same legal matter will be denied. A claim form signed by the Participant is required for all benefit payments, with the exception of telephone consultation benefit. **Attorney travel expenses, witness fees, investigation fees, forensic fees, courier or misc. filing services, fines, penalties, long distance telephone charges, photocopying costs, postage, fees for home purchases, survey fees, escrow fees, closing or similar costs, publications, language translator fees and other such non-legal costs will not be paid by the Legal Plan.** Such expenses and out of pocket costs are the responsibility of the Plan Participant/beneficiary receiving services. Visit www.exemplarlegal.com for instructions on completing and submitting Legal Plan forms, for Plan information, Plan Participant/dependent eligibility status, claim, and payment information. Except as otherwise stated in the Summary Plan Description, the following legal services shall be provided to eligible Participants/dependents at no cost.

Consultations

Benefit Maximum

These benefits are limited to the Participant only and limited to the terms and conditions of the Legal Plan. If further covered legal services are obtained, then these benefits are not a payable code. Legal matter must be identified on claim for payment.

000100 Telephone Consultation Resulting in No Action \$ 137

Limited to a maximum of a 30-minute telephone consultation for any legal matter not described as a covered legal benefit in this transaction code schedule. Claim form signed by Plan Participant is not required.

000200 Office Consultation Resulting in No Action \$ 282

Limited to a maximum of a 1-hour office consultation for any legal matter not described as a covered legal benefit in this transaction code schedule.

Legal Document Review and Preparation

These benefits cover:

000300 Legal Document Review \$ 554

This benefit is limited to a maximum of 2 hours per document review. If further covered legal services are obtained, then this code is not a payable code. Legal matter must be identified on claim.

000400 Legal Document Preparation \$ 322

This benefit is limited to advanced health care directives, bills of sale, childcare authorization, grant deed, title transfer, homestead declarations, power of attorney, promissory note, and conservatorship. Not applicable with will/trust benefit.

000500 Legal Document Preparation (Complex) \$ 828

This benefit is limited to challenges to denial of credit, deeds of trust, special power of attorney and revocation. Not applicable with will/trust benefit

**000600 Restraining Order –Petitioner Only
Domestic Violence Representation** \$ 2,814

This benefit is limited to Domestic Violence (non-employment related), participant and petitioner. Includes complete restraining order process, pleading, file, serve, TRO, resources, prep for hearing, hearing, order.

000700 Prenuptial Agreement \$ 2,510

This benefit covers may include office consultation, review of documents, prenuptial draft, client review, changes, final draft, and notarization. Benefit limited to Participant only.

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<u>Administrative Proceedings</u>	<u>Benefit Maximum</u>
100100 Administrative Proceeding Documentation required. This benefit covers social security disability application representation, veteran's benefit disputes, public benefit disputes, DUI administrative matters related to license suspension (excludes other related DUI hearings),	\$ 5,306
100200 DMV Administrative Hearing - Telephone Hearing	\$ 554
100300 DMV Administrative Hearing - Office Hearing	\$ 1,110
100400 Education Institute Issues & Disputes Documentation required This benefit includes education institute issues and disputes for students who are facing disciplinary action, suspension, expulsion from school, special education matters such as disputes over the provision of appropriate accommodations or services for students with disabilities. This benefit can be utilized for administrative disputes and proceedings but not court litigation.	\$ 5,306
<u>Civil Litigation</u>	
Documentation required These benefits cover the following legal matters in civil litigation. Complaint/petition must have been filed in a court of law. Includes pleading, prep for trial, and trial up to 4 days.	
150050 Consumer Protection - Limited to Transactions Over \$5,000 Limited to representation of plaintiff only.	\$ 6,641
150100 Plaintiff's Personal Injury Litigation will be handled on a 25% contingent fee basis.	\$ 0
150200 Defense of Debt Collection - Limited to Transactions Over \$500 Includes bankruptcy adversary proceedings.	\$ 5,033
150400 Defense of Uninsured Personal Injury and Property Damage	\$ 6,641
<u>Name Change</u>	
These benefits cover:	
150600 Name Change - Individual Petition	\$ 852
150625 Name Change - Joint Petition	\$ 1,254
<u>Garnishment of Wage</u>	
This benefit covers:	
150700 Garnishment of Wage Defense Excludes matters related to child support.	\$ 925
<u>Criminal Defense</u>	
Documentation required. These benefits cover the following legal matters, to include traffic, (DUI), driver suspension, loss of license, and juvenile defense.	
200150 Arraignment, Plea Negotiations, and Disposition	\$ 2,123
200300 Prep for Trial, including Motions and Discovery, Misdemeanor Only	\$ 3,012
200400 Trial (Maximum of 4 days) - Misdemeanor Only	\$ 8,362
200600 Juvenile Court Defense - Adjudication Hearing Only	\$ 4,438

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Driver License Suspension

This benefit covers:

200500 Driver License Suspension

Benefit Maximum

\$ 1,382

Real Estate

These benefits are limited to personal residence only. Limited to 1 claim every 3 years.

250100 Purchase or Sale

\$ 1,568

Preparation or review of offer/counteroffer, liens on title, lender problems, or recovery of deposit if no closing occurs.

250200 Boundary & Title Disputes

\$ 1,382

Excludes survey costs and quiet title proceedings.

260100 Mortgage Foreclosure

\$ 7,500

Documentation required - lender default notice. This benefit includes response, hearings, summary judgment, 3 days trial, short sale and renegotiating loan. Benefit limited to Participant only.

270100 Loan Modification or Refinance

\$ 2,774

This benefit covers preparation and review of loan modification documents, and renegotiating loan. Benefit limited to Participant only.

Tenant Matters

Documentation required. These benefits are limited to Participant or enrolled dependent only and **must** be the tenant. Excludes landlord representation. This benefit covers:

300050 Security Deposit Assistance

\$ 571

Excludes litigation.

300100 Representation of 3-Day Notice

\$ 1,408

300150 Representation of 15-Day Notice

\$ 1,408

300175 Representation of 30-Day Notice

\$ 1,408

300200 Representation of 90-Day Notice

\$ 1,408

300250 Unlawful Detainer Defense - Pleading and

\$ 6,914

Preparation for Trial

300300 Representation of 60-Day Notice

\$ 1,408

300350 Unlawful Detainer Defense - Settlement Conference

\$ 2,500

300400 Unlawful Detainer Defense - Trial

\$ 7,960

Final judgment. This benefit is limited to 4 days of trial. Payable at 50% if attorney fees are awarded to participant.

300500 Unlawful Detainer Defense - Motion for Summary Judgment

\$ 6,376

Includes pleading, discovery, and motion.

Personal Bankruptcy

These benefits are limited to the Participant only, the Participant and spouse filing jointly, or the Participant and domestic partner filing individually to only one of the following and is limited to 1 claim per 7 years. Concurrent claim for debt collection and bankruptcy benefit are not allowed.

350100 Chapter 7

\$ 3,473

350200 Chapter 13

\$ 5,000

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Marital Dissolution/Legal Separation/Annulment

Benefit Maximum

These benefits are limited to the Participant only. Representation limited to a maximum of 3 court appearances or to filing of default. Includes paternity. Excludes arrearage matters. Not an applicable benefit with concurrent open claim for establishment/modification of child support/custody.

400100	Petitioner-Without Property Settlement and Without Child Support/Custody Agreement	\$ 7,510
400125	Respondent-Without Property Settlement and Without Child Support/Custody Agreement	\$ 7,510
400200	Petitioner-With Property Settlement and Without Child Support/Custody Agreement	\$10,356
400225	Respondent-With Property Settlement and Without Child Support/Custody Agreement	\$10,356
400300	Petitioner-With Property Settlement and with Child Support/Custody Agreement	\$11,795
400325	Respondent-With Property Settlement and with Child Support/Custody Agreement	\$11,795
400400	Petitioner-Without Property Settlement and with Child Support/Custody Agreement	\$10,356
400425	Respondent-Without Property Settlement and with Child Support/Custody Agreement	\$10,356

Will and Trust

These benefits cover the following and includes preparation and recording of all personal residence deed(s), title transfers, healthcare proxy(s), advanced care directive(s), power(s) of attorney, attestation(s) to witness(s) of will(s), notarization of trust(s), and attestation(s) to will and trust signature(s) when applicable. Benefit limited to Participant and enrolled dependent.

450100	Simple Will for an Individual Includes power of attorney. Excludes trust.	\$ 700
450200	Simple Wills for a Couple Includes healthcare proxy(s), advanced care directive(s), and power(s) of attorney. Excludes trusts.	\$ 1,013
450300	Codicil of Will(s) for an Individual or Couple Include trust(s). Not applicable if will/living will(s) is revoked in its entirety.	\$ 554
450400	Will and Trust for an Individual Includes will, pour-over will, revocable/living trust, healthcare proxy(s), advanced care directive(s), and power(s) of attorney.	\$ 1,938
450500	Will and Trust for a Couple Includes wills, pour over wills, revocable/living trust(s), healthcare proxy(s), advanced care directive(s) and power(s) of attorney.	\$ 2,774
450600	Probate Includes all phases of probate to completion.	\$ 6,024

Identity Theft

These benefits cover:

500100	Negotiations	\$ 937
500200	Pre-Litigation	\$ 925
500300	Litigation	\$ 5,491

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Additional Hearing & Trial Days

Documentation required. This benefit is limited to an existing criminal, civil, family, or tenant claims where hearing/trial days exceeded 4 days on the existing claim. Benefit limited to 5 trial days and Participant only.

500150 Additional Hearing & Trial Days

Benefit Maximum

\$10,040

Court & Miscellaneous Fees

Documentation required. Reimbursement only, receipt required. These benefits cover:

600100 Court Filing Fee and Service of Process

\$ 1,150

600200 Deposition, Deposition Court Reporting, Deposition Transcription, Deposition Translation Fee

\$ 1,150

600500 Notary

\$ 48

Claim forms required.

600600 Mediation (to include administrative fee)

\$ 2,308

Claim forms required.

600700 Attorney Travel Expenses

\$ 1,000

This benefit covers hotel, car rental, air travel & hotel expenses. Limited to existing claim and benefit codes under marital dissolution, criminal, and tenant matters. Receipts with itemization required. Claim forms required.

Child Support/Custody, Guardianship, and Adoption

Includes pleading, prep for trial and trial up to 4 days, and paternity. Excludes arrearage matters. These benefits cover:

700100 Establishment or Modification of Child Custody/ Child Support Order

\$ 5,548

Limitation- Not an applicable benefit with concurrent open 400000 series claim.

700400 Uncontested Guardianship Petition

\$ 2,662

700500 Uncontested Agency Adoption

\$ 1,334

700550 Uncontested Stepchild Adoption

\$ 2,123

700600 Uncontested Independent/Private Adoption

\$ 2,662

Internal Revenue Service and Franchise Tax Board Matters

Documentation required – These benefits cover:

900100 Defense of IRS/FTB Collections (less than \$3,500)

\$ 1,801

900200 Representation at Audit

\$ 1,938

900300 Defense of IRS/FTB Collections (greater than \$3,500)

\$ 7,951

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TRANSACTION CODE SCHEDULE

800000 Immigration Legal Benefits - United States Only

Description: This Transaction Code Schedule is effective March 1, 2024. Previous Transaction Code Schedules will be in effect for all benefit claims and Panel Attorney work commenced prior to March 1, 2024. Only professional services and Legal Plan benefits specifically identified in this Transaction Code Schedule are covered and will be approved for authorization of a Legal Plan claim and payment and pursuant to the terms and conditions of the Legal Plan. Covered Immigration matters are paid on a flat fee basis. **Benefits are not reinstated annually except for the following:** Effective 05/01/2007 the Board of Trustees implemented a two-year waiting period for all re-application for citizenship/800010, visa petition/permanent residency/naturalization 800100, or consular processing/affidavit of support/801100/800500 along with associated filing fees, with a maximum lifetime benefit of 2 for these codes. All other immigration benefits are limited to 1 lifetime benefit per eligible participant or dependent. Approved Panel Attorneys agree to accept the maximum benefit and shall not charge the Plan Participant additional professional fee(s) for covered benefits regardless of if the maximum benefit is exhausted. Approved Panel Attorneys agree to **submit Legal Plan approved claim processing forms prior to commencement of services** and are required to provide the Fund with **timely approved Legal Plan statement forms for each authorized claim**. All Legal Plan claim processing and payment forms are available at www.exemplarlegal.com and required to be submitted via secure Dropbox located at www.exemplarlegal.com. Out of date, scanned, handwritten, incomplete, or erroneous information on Plan forms or Dropbox fields will be rejected. Legal Plan forms required receipts and documents will not be accepted by facsimile or email due to unsecure transmission. **Immigration benefits, depending on the covered benefit description, are limited to eligible Participant, enrolled dependent, or the Participant must be the petitioner, sponsor, or beneficiary for/of Participant's parents, siblings, spouse, child(s). Only the identified benefits and associated USCIS filing fee form number identified in this Transaction Code Schedule are covered and will be approved for payment.** Covered filing fee benefits exclude all biometric fees, medical examination, and additional fees for paper filing. A claim form signed by the Participant is required for benefit payments. All covered immigration filing fee checks issued by the Fund for paper filing are payable to U.S. Department of Homeland Security. Reimbursement to a Participant or approved Panel Attorney for covered immigration filing fees paid online to USDHS office are permitted effective March 1, 2024. Credit card receipt and USDHS I-797 paid receipt is required to be submitted via Legal Plan Dropbox. Credit card statement/form I-797 must clearly identify the date paid, amount, and Participant name which the Legal Plan claim was authorized. **Under no circumstances will reimbursement be paid by the Fund if a Legal Plan claim was not authorized to an approved Panel Attorney, or the Panel Attorney did not provide covered Legal Plan benefit, or the Participant was later determined ineligible at the time the filing fee was identified on the required receipt.** The statute of limitation for reimbursement is 1 year from date the claim was authorized. **Statements forms are required to be submitted upon completion of the covered benefit and must include service commencement and completion dates.** Statements are required to be submitted by the 3rd business day of each month to be processed in the monthly benefit payment cycle. **A letter explaining exceptional circumstances is required for untimely statements.** Benefit payments will be released on the 15th business day of each month. Please allow 3-10 business days for U.S. Postal Service delivery. Visit www.exemplarlegal.com for instructions on completing and submitting all Plan forms, for Plan information, and Participant/dependent eligibility status. Except as otherwise stated in the Summary Plan Description, the following legal services shall be provided to eligible Participants/dependents at no cost.

Immigration Consultation

If further covered legal services are obtained, then this code is not a payable code.
Benefit limited to eligible Participant or enrolled dependent. This benefit covers:

	<u>Benefit Maximum</u>
800001 Immigration Consultation Resulting in No Action	\$ 101

Request for Records

Benefit limited to eligible Participant or enrolled dependent. This benefit covers:

800002 Freedom of Information Act-Form G-639	\$ 174
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Respond to Request for Evidence (RFE)

Benefit limited to Participant, eligible enrolled dependent, or Participant must be petitioner/sponsor, or beneficiary for/of Participant's family relative. This benefit covers:

800003 Respond to Request for Evidence (RFE)	\$ 402
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Documentation required. I-795-E

Citizenship

Benefit limited to eligible Participant or enrolled dependent. Limited to one (1) lifetime benefit.
This benefit covers:

800010 Application for Naturalization	\$ 704
800050 Filing Fee - Form N-400	\$ 710
800060 Filing Fee - Form N-600	\$ 1,335
800070 Filing Fee - Form N-600K	\$ 1,385

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<u>Permanent Residency/Naturalization</u>	<u>Benefit Maximum</u>
Benefit limited to Participant, eligible enrolled dependent, or Participant must be petitioner/sponsor, or beneficiary for/of Participant's family relative, unless otherwise stated. This benefit covers:	
800100 Petition for Alien Relative	\$ 804
Limited to one (2) lifetime benefits.	
Additional Petitions	\$ 549
800150 Filing Fee - Form I-130	\$ 625
800101 Supplemental Information for Spouse (1-130A)	\$ 248
800180 Refugee/Asylum Relative Petition	\$ 509
800200 Application to Register Permanent Residence or Adjustment of Status	\$ 1,052
Limited to one (1) lifetime benefit.	
Additional Applications	\$ 704
800250 Filing Fee - Form I-485	\$ 1,440
800255 Filing Fee - Form I-485A	\$ 950
800400 Application for Employment Authorization	\$ 174
Limited to eligible Participant or enrolled dependent.	
800450 Filing Fee - Form I-765	\$ 470
Limited to eligible Participant or enrolled dependent.	
801300 Application to Replace Permanent Resident Card	\$ 469
Limited to Participant only.	
801350 Filing Fee - Form I-90	\$ 415
Limited to Participant only.	
Deferred Action for Childhood Arrivals	
Benefit limited to eligible Participant or enrolled dependent. This benefit covers:	
800700 Deferred Action for Childhood Arrivals (DACA)	\$ 590
800750 Filing Fee - Form I-821D	\$ 410
Permanent Residency/Naturalization - Consular Processing	
Benefit limited to Participant, eligible enrolled dependent, or Participant must be petitioner/sponsor, or beneficiary for/of Participant's family relative, unless otherwise stated. This benefit covers:	
800100 Petition for Alien Relative	\$ 804
Limited to one (2) lifetime benefit.	
Additional Petitions	\$ 549
800150 Filing Fee - Form I-130	\$ 625
800101 Supplemental Information for Spouse (1-130A)	\$ 248
800500 Affidavit of Support	\$ 415
Limited to petitioner.	
800550 Filing Fee - Form I-864	\$ 120
801100 Consular Processing	\$ 1,052
801150 Filing Fee - Form DS-260	\$ 325

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Benefit Maximum

Permanent Residency/Naturalization – Fiancé(e)

Benefit limited to Participant, eligible enrolled dependent, or Participant must be petitioner/sponsor, or beneficiary for/of Participant's family relative, unless otherwise stated. This benefit covers:

802100	Petition for Alien Fiancé(e)	\$ 1,407
802150	Filing Fee - Form I-129F	\$ 675
802200	Consular Processing for Alien Fiancé(e)	\$ 509
802250	Filing Fee - Form DS-160	\$ 265

Deportation Defense

Benefit limited to Participant, eligible enrolled dependent, or Participant must be petitioner/sponsor, or beneficiary for/of Participant's family relative, unless otherwise stated. Additional deportation services are considered non-covered services. This benefit covers:

800600	NACARA Application - Suspension of Deportation or Special Rule for Cancellation of Removal	\$ 1,005
800650	Filing Fee - Form I-881	\$ 340
803100	Master Calendar Court Appearance	\$ 509

Limited to master court appearance only.

Affirmative Political Asylum

Benefit is limited to Participant, eligible enrolled dependent, or Participant must be petitioner/sponsor, or beneficiary for/of Participant's family relative. This benefit covers:

804100	Application for Political Asylum	\$ 1,179
804200	Interview on Asylum Application at USCIS	\$ 1,179

Documentation required – I-797 Notice of Action.

Interviews

Benefit is limited to Participant, eligible enrolled dependent, or Participant must be petitioner/sponsor, or beneficiary for/of Participant's family relative. Interviewee preparation, document preparation, and attendance with interviewee is required. This benefit covers:

800300	Adjustment of Status Interview at USCIS	\$ 905
800102	Alien Petition Interview	\$ 603
805100	Joint Petition Interview at USCIS	\$ 509
805200	Waiver of Joint Petition Interview at USCIS	\$ 831
805300	Naturalization Interview at USCIS	\$ 415
805500	Secondary USCIS Interview to Deny or Revoke Petition	\$ 831
805700	Naturalization Interview at USCIS, Requirement of Second Interview	\$ 415

Petition to Remove Conditions on Residency

Benefit limited to Participant, eligible enrolled dependent, or Participant must be petitioner/sponsor, or beneficiary for/of Participant's family relative. This benefit covers:

805400	Petition to Remove Conditions on Residency	\$ 1,152
805450	Filing Fee - Form I-751	\$ 750

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<u>Temporary Protective Status</u>	<u>Benefit Maximum</u>
Benefit limited to Participant or eligible enrolled dependent. This benefit covers:	
806000 Temporary Protective Status (TPS)	\$ 590
806050 Filing Fee - Form I-821	\$ 50
<u>Adoptee and Orphan Petition</u>	
Benefit limited to Participant, eligible enrolled dependent, or Participant must be petitioner/sponsor, or beneficiary for/of Participant's family relative. This benefit covers:	
806100 Petition to Classify Convention Adoptee as an Immediate Relative	\$ 643
806150 Filing Fee - Form I-800	\$ 920
806200 Application to Determination of Suitability to Adopt a Child from a Convention Country	\$ 965
806250 Filing Fee - Form I-800A	\$ 455
806300 Orphan Petition	\$ 670
806350 Filing Fee - Form I-600	\$ 920
806400 Advanced Processing for Orphan Petition	\$ 1,005
806450 Filing Fee - Form I-600A	\$ 455
<u>VAWA (Violence Against Women Act)</u>	
Benefit limited to Participant, eligible enrolled dependent, or Participant must be petitioner/sponsor, or beneficiary for/of Participant's family relative. This benefit covers:	
800800 Petition for Amerasian, Widow(er) or Special Immigrant	\$ 2,184
800850 Filing Fee - Form I-360	\$ 515
<u>Waiver</u>	
Documentation required – Identify waiver issue. Benefit limited to Participant, eligible enrolled dependent, or Participant must be petitioner/sponsor, or beneficiary for/of Participant's family relative, unless otherwise stated. This benefit covers:	
805600 Joint Waiver of Conditions, To Exclude Criminal or Fraud	\$ 590
Limited to Participant only.	
800900 Application for Waiver of Grounds of Excludability and Related Documents	\$ 2,519
Limited to medical or mental clearance representation, excludes criminal, fraud matters, and unlawful presence.	
800950 Filing Fee - Form I-601	\$ 1,050
Limited to medical or mental waiver, excludes criminal, fraud matters, and unlawful presence I-601A.	