

Plan for Achieving Self Support (PASS) Updated January 2017

Purpose

To provide information on the eligibility for PASS Plans and process for purchasing one.

Rationale:

A PASS is an SSI work incentive that lets consumers use their own income or assets to help them reach their work goals. PASS Plans can be used to fund items, services, or skills that consumers need to reach their IPE goals. For DVR purposes, a PASS **cannot** be considered a comparable benefit. However, a consumer may choose to use a PASS to pay for additional items not covered by DVR or to voluntarily share in the cost of a DVR purchased service, etc.

Examples of possible uses for a PASS plan: vehicle and/or modifications, equipment for self employment, assistive technology for work, vehicle insurance, specialized training, attendant care, home improvements, subscription services (phone, internet) or any other item or service identified to assist an individual to become self-supporting.

Eligibility for a PASS Plan:

1. Be SSI eligible (i.e. assets less than \$2,000, married consumers may not be eligible for SSI, etc.).
Note: SSA will allow for a resource PASS. So, if assets are over the limit but are intended to be used towards the work goal, they can be excluded. (example: bank account with \$10,000 that will only be used for school).
2. Have sources of income other than SSI (e.g. SSDI, work earnings).
Note: Many PASS applicants do not receive SSI but with the PASS exclusion, become eligible for SSI. **This is important to know because sometimes people are told unless they are already on SSI, they can't have a PASS – which is WRONG!**
3. Be able to live on SSI income (in most cases about \$735 per month in 2017).
4. Have a clearly defined job goal.
5. Want to work at a substantial level (2017 \$1,170 mo if on SSDI or substantially reduce their SSI benefit if SSI only recipient, link to current SGA amounts: <http://www.ssa.gov/OACT/COLA/sga.html>).
6. Not ALREADY working at a substantial level.
7. Have an employment plan that is sustainable after the PASS ends (i.e., must demonstrate the ability to be “self-supporting”).

Process for a PASS Plan

1. The DVR consumer, DVR staff person and the PASS Plan Provider should have a meeting to insure the above eligibility criteria have been met, including a discussion of the IPE goal and implications of the decision to complete a PASS plan. It may be determined that a traditional benefits analysis may be necessary, as an alternative to a PASS plan, after discussion.
2. Completion of the SSA-545 form. (attached)
Major elements are: an appropriate and attainable job goal, the goods/services needed to reach that goal, a "budget" (how much is going into the PASS each month and the expenses), cost estimates for the various goods and services, a timetable to reach the goal, contributions to the plan from other funders, and major steps or milestones along the way.
3. Submission of the form to Social Security cadre in Wisconsin.
4. Once a completed PASS application reaches the PASS Cadre in WI, it usually takes about 1 month to be accepted, and the PASS can begin immediately.
5. After acceptance, the PASS plan must be reviewed and progress reported to SSA every 6 months. In some cases this can be time consuming. In some cases it is not. Consumers could fulfill this function themselves in many cases. If this process becomes difficult the consumer may need assistance from a professional.

DVR staff are encouraged to negotiate the price with individual benefits analysis providers to more accurately reflect the need for customized rates dependent on the complexity of the plan. The average time frame for completion of a PASS plan is 10-20 hours. It is possible that an individual consumer could complete a PASS plan on their own. However, because it is a complex and time-consuming process, there is a greater insured success of Social Security acceptance if a provider assists with an application. The provider may want to establish an hourly rate of service.

Further information can be found:

- <http://www.ssa.gov/>
- <http://www.socialsecurity.gov/disabilityresearch/wi/pass.htm>
- 545 form: <http://www.ssa.gov/online/ssa-545.pdf>