

## PASS Process Part 2

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## Benefits Query

- Secure BPQY to confirm benefits, disability, etc.
  - This is not the final word, but lets you know what SSA shows in their file
  - May need to assist the beneficiary in correcting errors on the BPQY

## Determining PASS Eligibility

1. SSI only = PASS, not right now – pursue other income
2. SSI only with deemed income (spouse-to-spouse or parent-to-child), PMV, and/or resources = Maybe set aside in PASS

## Determining PASS Eligibility

3. Title II only = PASS, maybe – is a candidate
  - Must be SSI eligible
    - Disability
    - Resources
    - Not SGA

## Determining PASS Eligibility

- If a PASS is written using Title 2 only, must apply for SSI at the same time you submit the PASS
  - Call the 800-line or apply at the local office – request protective filing date
  - When someone becomes eligible for SSI, look at deeming, in-kind, and resources.
  - Job goal must result in likelihood of Title 2 cash benefit cessation

## Determining PASS Eligibility

4. Title II and SSI = PASS, probably - is a candidate
5. Title II and 1619(b) = PASS, maybe - is a candidate
  - Does not need to be in active SSI cash payment status, just eligible for SSI
6. No benefits at all = maybe

### Explain the Rules & Process of a PASS

- Secure current monthly expenses
  - Use the worksheet
  - Look at what current expenses can be
    - placed in the PASS;
    - covered by Medicaid; and/or
    - decreased/eliminated by other support programs (HUD, food stamps)

### Determine PASS Set Aside

- Step 3 on the SSI calculation sheet
- Title II benefits are **NOT** ignored the amount of the PASS set aside when determining continued benefits.
- ALWAYS determine their continued entitlement for Title II cash payment FIRST
  - Step 1 on SSI sheet

### Check if Person Receives

- HUD, Food Stamps, other needs-based programs ignore the amount set aside in PASS
- Will now be eligible for Medicaid, possibly lowering out-of pocket costs
- Add current mo. expenses into the PASS\*\*
  - Transportation was \$50/mo. – now PASS expense

### Determine the Itemized & Total Cost of PASS Items

- If the expense is monthly, multiply it by the numbers of mos. the PASS is reasonably expected to last
- If the expense is annual, multiply it by the number of years the PASS is reasonably expected to last

### PASS & Tuition

- Take the number of credit hours needed to graduate & multiply it by the cost per credit hour, then
- Subtract any grants and scholarships that the person will receive - then, add any tuition debt already incurred

### PASS & Tuition

- The beneficiary will need to secure a degree plan, statement from the school showing estimated tuition, books and fees
- Must apply for grants prior to the PASS being approved

## PASS & a Vehicle

- Check with PASS Specialist on approvable amount to spend
  - Look for a reliable car – if it costs more, negotiate with PASS Specialist.
  - Must also secure insurance
  - If the person does not have a driver's license, add driver's ed and/or securing license before you purchase car on the plan.

## PASS & a Vehicle

- Have documents showing the projected expenses

## Determine if PASS can be Retroactive

- To request retroactivity person must be SSI eligible & already working toward their voc goal
  - SSI eligibility would be those who are concurrent, SSI and other income, Title II and 1619(b), 1619(b) and other income.
  - You cannot use retroactivity for Title II only

## Ready to Write the PASS?

- When you submit the PASS be sure to give the person a copy and keep a copy for your files
  - Include consents and other documents (degree plan, etc)

## Ready to Write the PASS

- PASS Specialist will see if the PASS is reasonable & feasible
  - Get VR to write a letter saying they reviewed the PASS and find it to be reasonable  
(even if they are not offering funding assistance)

## PASS Requirements

- Organization / SSA-545
- Feasible occupational goal
  - Definable timeframe
  - Sources to be set aside
  - Expenditures
  - Major purchases
- Interval steps/milestones

## Organization

- PASS must be in writing & SSA has established form SSA-545 to assist in completing a Comprehensive Plan.
- Benefits Specialists should be prepared to assist the development of the PASS

## Organization

- SSA Claims Reps, PASS Specialists or Work Incentive Liaisons can assist in writing the plan

## Occupational Objectives

- PASS must be especially designed for each individual and have a designated & feasible occupational objective.
- Non-occupational objectives, such as basic living skills or homemaking skills, do not meet PASS requirements.

## Occupational Objectives

- The proposed voc goals must be clearly stated indicating job titles or, if self-employed, the type of business.

## Occupational Objectives

- It is important to note the individuals' age, prior work history, education and training, disability, current earnings and if there is a reasonable chance that they can attain the objective.

## Interval Steps / Milestones

- The PASS must incorporate milestones and corresponding timeframes leading to attainment of the occupational objective.

### Interval Steps / Milestones

- These demonstrate the person's progress toward achieving the goal and should be described sufficiently so that completion of steps are readily discernible.

### Interval Steps / Milestones

- Milestones are best documented using criterion-based statements.

### Sources To Be Set Aside

- Plans must state the sources and the amount of income or resources to be set aside
- The sources, amounts and rates of accumulation of income and resources must be adequate, but not excessive to achieve the goal.

### Sources To Be Set Aside

- Plans must also show how income/ resources set aside will be kept clearly and easily identifiable.