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Tools for Inclusion

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Helpful Hints: How to Fill Out a Winning PASS

by Jaimie Ciulla Timmons and Steven Graham

Introduction

This *Tools for Inclusion* provides information about PASS (Plan for Achieving Self-Support). PASS is a program offered by the Social Security Administration to help people receiving Supplemental Security Income (SSI).

Using the story of Danielle, this brief will explain PASS in more detail. As you read her story, you will see how she fills out a PASS application. Because the application can be confusing, helpful hints are provided. Danielle's story shows how a person can successfully apply for PASS and use it to reach work goals.

What is PASS?

PASS is a program that helps you reach work goals such as finding a job, finding a better job, or becoming more independent at work. This program allows you to set aside money from your check that will not reduce your SSI benefits or affect your eligibility to receive SSI. The money that you set aside must be used for things that help you reach your work goal. Examples of such things include classes that you need to take for a new job, use of a job coach (a trained professional who provides assistance with, and instruction in, job skills for people with disabilities), or transportation to and from a job. You need to mail your PASS application to the Social Security Administration and have it approved before you can start setting money aside.

What do I need to know before I apply for a PASS?

Anybody who receives an SSI check, earns money at work, and is over the age of 15 can apply for a PASS. The Social Security Administration must approve the plan before you can use it. There are common mistakes that many people make when filling out a PASS application. This *Tools for Inclusion* will tell you about these mistakes and how to avoid them. The following example will show you how a typical person, Danielle, successfully uses a PASS, and how she avoids these common mistakes.

Danielle's Story

Danielle is a 19 year old woman receiving SSI. She has been working 10 hours a week for the last six months at a local radio station through a school work program earning $5.00 per hour. At the radio station she does filing and organizes promotional items. She will be graduating from high school in four months, and the radio station has offered her a job starting shortly after graduation that will pay $7.50 an hour for 30 hours per week. This job is an assistant receptionist position, for which Danielle will need to learn new skills. Danielle and her teacher decide that she will need some job coaching to be successful in this position. They decide to write a PASS while Danielle is still working, so that Danielle can set aside some of her paycheck to pay for a job coach in her new position. They realize that they need to contact a Certified Rehabilitation Counselor (CRC) for a vocational assessment before completing the PASS application.

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Helpful Hint:
Once you decide that you will apply for a PASS, the first thing that you need to do is have a vocational assessment. A vocational assessment is a meeting with a rehabilitation professional who will ask you about your job skills and interests. This meeting is necessary so that you and the Social Security Administration can be sure that your work goal is likely to be reached. The professional that does your vocational assessment needs to be a CRC. You can contact a CRC through the vocational education department at your school, your state's vocational rehabilitation agency, or a private agency that provides employment services to individuals with disabilities.

Danielle's counselor from her state vocational rehabilitation agency is a CRC and has been working with her throughout her high school years, so Danielle and her teacher decide that she is the right person to complete the vocational assessment. Danielle's counselor asks her questions about skills she has learned during her work at the radio station and about skills she will need to be successful in the new position. After speaking with Danielle, she decides that the position is a good match for Danielle's skills and goals, and encourages her to complete a PASS. Danielle's counselor also writes a letter to include with the PASS application, saying that Danielle is likely to succeed in this new position with the requested job coaching services.

Helpful Hint:
The CRC who conducts your vocational assessment should also write a letter that says that you are likely to reach your work goal. Including this letter with your PASS application will help your plan start more quickly.

Part I of the PASS application

The first question on Danielle's PASS application asks her to write down her work goal. Her teacher knows that it is important to write a specific work goal when answering this question. So, instead of writing down, "getting a better job at the radio station," (which is not very specific) they write "getting a job as an assistant receptionist" (which is very specific). This makes Danielle's application much more likely to be approved.

Helpful Hints for Part I:

- *Make sure that the work goal you write down is as specific as possible (like Danielle's).*
- *If a teacher or job coach helps you with your work, your goal may be to decrease the number of hours of help you receive. If this is your goal, be careful to write down the specific number of hours of help you receive now, and the specific number you expect to receive when the PASS is completed. For example, your goal could say, "decrease the number of job coach hours I receive at work from 15 per week to 5 per week."*
- *You can only write down one work goal. For example, Danielle's goal could not be, "get a job as an assistant receptionist for a few years and then become a senior receptionist." When Danielle wants to become a senior receptionist, she can complete another PASS at that time.*
- *Your work goal cannot be a college degree or finishing a training program. Your goal must be getting a new job or decreasing the help that you receive at your current job. The PASS could allow you to set aside money for school, but your goal needs to be the job you will get when you leave school.*

Part III of the PASS application

Danielle and her teacher think about all of the steps that Danielle will need to take in order to reach her work goal. They also estimate the dates that Danielle will start and finish each of these steps. These are important things to know in order to fill out Part III of the PASS application. Danielle's first step is to receive eight hours of job coaching per week for the first four months of her new job. Her second step is to decrease the hours of her job coach to five per week for three months and her third step is to decrease to two hours per week for two months. Danielle's last step is to receive assistance from her job coach on only a check-in basis.

Since Part III of the PASS application also requires Danielle to write down the cost of each of these steps, she and her teacher find out how much job coaches cost. Finding this out also tells Danielle how much money she will need to set aside to pay her job coach. They get a letter from the job coach saying exactly what her services will cost and include this with Danielle's application. This letter will speed up the approval of Danielle's PASS since the Social Security Administration will know that the amount of money Danielle wants to set aside is correct.

Helpful Hints for Part III:

- *Each step of the PASS must have realistic dates.*
- *You may list as many steps as needed to reach your goal.*
- *There is no time limit for completing your PASS. If your plan is longer than 18 months, however, the Social Security Administration will review it every 18 months and re-approve it if everything is ok.*
- *The last step of your PASS should always be to start a new job (unless your work goal was to reduce the hours of help you receive from a job coach). This step must be written down for your plan to be approved.*

Part IV of the PASS application

Danielle and her teacher must list the things or services that Danielle needs to buy in order to reach her work goal. All of the things listed on this part of the application must be necessary for reaching the work goal, and documenting the cost of these things is important for having a PASS application approved. Danielle and her teacher list the cost of the job coaching services that she will need and include the letter from the job coach as proof of how much the services will cost.

Danielle's teacher helped her complete her application, so Danielle must include her teacher's name and phone number with her application. Danielle's mother gets her daughter's checks in her name (this is called a representative payee), so she also has to sign Danielle's application. The PASS application is now complete, and Danielle sends it to her local Social Security office for approval.

Helpful Hint for Part IV:

- *If you need to purchase something as part of your PASS (such as special tools or a computer), include a flier, newspaper ad, or a page from a catalog showing how much the item you need costs. In Danielle's case, she provided a letter from the job coach.*

More Helpful Hints:

- *If someone helps you fill out your PASS application, you must include their name and telephone number with your application.*
- *If somebody gets your SSI check in their name (a representative payee), they must also sign your application.*

Danielle's PASS application is approved by the Social Security Administration. She begins to set aside money for her job coach, and keeps careful records that she will need to show the Social Security Administration. She writes down the date and amount of every payment she makes to her job coach, and gets a receipt to keep as proof of payment.

After the first four months of Danielle's PASS, she and her job coach agree that she needs to have eight hours of job coaching per week for two more months. Since this is different than the dates listed on her application, Danielle needs to let the Social Security Administration know. She calls her local Social Security Field Office right away, and they authorize the change to her original application. Danielle receives the extra two months of job coaching at eight hours per week, and then finishes her PASS as she planned in the beginning. Danielle is now able to work independently as an assistant receptionist without regular help from her job coach!

Final Thoughts

- *The Social Security Administration will want proof that you finish each of the steps in your PASS. Make sure to keep careful records of finishing each step, and keep all receipts for the money you spend for the plan.*
- *If you are unable to complete any of the steps to your work goal or if you need to make any change to your PASS, you must call your local Social Security Field Office right away. If you do not call them, you may need to give money back to the Social Security Administration.*
- *If you have a PASS and decide that you do not want to complete the plan, you must end the plan by calling your local Social Security Field Office. After ending the plan, you may apply for a new one. This will involve getting another vocational assessment.*
- *You should call your local Social Security Field Office with any questions you have about applying for a PASS or about keeping a PASS.*
- *For more information on PASS, call the Social Security Administration at 1-800-772-1213 to find the local field office nearest you. Also ask them to send you a booklet called Working While Disabled, A Guide to Plans for Achieving Self-Support (SSA publication No. 05-111017). This booklet is free of charge and will tell you more about PASS. The booklet can also be found on the SSA's web site at www.ssa.gov/pubs/11017.html*

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This publication will be made available in alternate formats upon request.

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