

## **How do I spot a really good PASS candidate?**

All three of these items must be in place for a PASS to work:

- 1.** The person **MUST** have a feasible occupational goal which is expected to result in SGA-level earnings or substantial reduction in SSI; and
- 2.** The person must have some form of countable income or resources to set aside in the PASS; and
- 3.** The person must need items or services in order to achieve the occupational goal.

There are also certain situations in which a PASS simply won't work:

- The individual has no desire to work, or the occupational goal clearly won't lead to SGA-level employment or substantial reduction in SSI.
- The individual is already working at a substantial level.
- There is no income or resources to set aside in the PASS.
- The individual simply can't establish eligibility for SSI, even with a PASS.
- The person can't live on disposable income left after a PASS is in place.

## **What can I do to help a beneficiary decide whether or not a PASS is right for him or her?**

CWICs need to help beneficiaries assess their strengths and potential weaknesses as a PASS candidate **BEFORE** they invest time and effort in developing the PASS. There is absolutely no point in developing a PASS that has zero chance of being approved. This wastes the time of both the CWIC and the beneficiary, and needlessly raises the beneficiary's expectations and hopes, only to see him or her suffer a letdown when Social Security denies the PASS. Using the PASS Candidate Checklist is a great way to conduct an assessment of PASS appropriateness. This tool will highlight any vulnerability the beneficiary will have in terms of PASS approval in advance. The CWIC can use these indicators to either help the beneficiary determine **NOT** to pursue the PASS, or to identify those areas that will require extra attention when writing the PASS. A copy of the PASS Candidate Checklist is provided at the end of this unit.

## **What is the best way to introduce PASS to a beneficiary who is a solid PASS candidate?**

The best approach involves four simple tasks:

- 1.** Focus on the possibilities and benefits of a PASS: Don't dwell on how much time and work it entails.
- 2.** Cover the basic concepts: Don't overwhelm beneficiaries with too much detail in the beginning.
- 3.** Explain your role and what you can do to assist with developing and managing the PASS.
- 4.** Ask for a decision: yes or no?

## **When the decision to pursue PASS is a "go," what are the steps I need to take to get started?**

- 1.** Explain the PASS submission, review, and approval process carefully.
- 2.** Introduce the PASS form and go over it in detail to answer questions.
- 3.** Assign a manageable amount of "homework" to the beneficiary and support system.
- 4.** Establish a deadline for completion of first homework assignment and next meeting.

When assigning homework to help develop the PASS, assign it in this order:

- 1.** Parts 1 and 2, all sections
- 2.** Part 4, sections A-D and F-H, and Part 5
- 3.** Review Part 3 and 4E for what information needs to be gathered. You should provide instruction on how to gather the necessary information and how specific it should be.
- 4.** Review Part 3 and 4E for completeness. Reassign homework as needed to complete. If complete, go forward and complete Part 6 and 7.

**NOTE:** When self-employment is the goal, the first step **MUST** be the individual's development of his or her business plan. Don't begin the PASS until the beneficiary has developed the business plan in accordance with PASS requirements.