

Plan for Achieving Self Support (PASS)

Analysis

Client:

Date:

Summary:

A PASS is a Social Security program that is designed to assist people with disabilities achieve self-sufficiency, and as a result reduce or eliminate need for Social Security disability benefit programs. This tool is designed to help you determine if a PASS is a possible resource for you. If all the questions below are answered with a "Yes", your Work Incentive Coordinator can help you pursue this Social Security Work Incentive.

- 1. Do you have expenses that you need assistance paying for to reach your vocational goal?**
Yes/No
- 2. Does your vocational goal involve eliminating your need for Social Security Disability Insurance or reducing your need for SSI over time?**
Yes /No
- 3. Do you have money other than SSI to set aside now or in the near future?**
Yes/No Below is the calculation of her/his PASS Contribution.

- 4. Can you live on what you will have after you set aside your PASS contribution?**
Yes/No
Income without a PASS:
Income with a PASS:
- 5. If not already eligible for SSI, can you meet all the eligibility requirements?**
Yes/No
- 6. Are you able to, or do you have the necessary support, to manage a second bank account, track PASS expenses, collect and keep receipts, follow milestones of the PASS and communicate with the PASS Cadre when you need to make changes to your PASS?**
Yes/No

Completed By:

Contact Information:

****Calculations above are estimates only, official calculations are be conducted by Social Security. This PASS Analysis is based information you provided about your situation at the time this analysis was conducted. As your life changes, your benefits can also change. This information can become outdated quickly. If you do not use this information in the next month, contact (WIC NAME HERE AND PHONE NUMBER HERE) to update your PASS Analysis to be sure you are making decisions about work based on up-to-date information.