



TX VRC Resource Tools

Plans to Achieve Self Support: Completing Applications

Plans to Achieve Self Support (PASS) are a Social Security Work Incentive that can help beneficiaries reach their work goals, and might be particularly helpful for those pursuing self-employment. PASS can be used in combination with VR Services to potentially purchase items and services that VR can't support (e.g., vehicles), provide additional resources which might be needed for start-up, extend support past VR case closure, and potentially be a resource during Order of Selection. Another VRC Resource Tool focuses on identifying good candidates for PASS. This tool is designed to help VRC's support customers with PASS applications.

To start, download the PASS application from the SSA website or click this link to follow along:
<https://griffinhammis.coursearc.com/files/6116/0322/7669/ssa-545.pdf>

The PASS Application is comprised of the following sections:

Part A: Your Work Goal.

This section requires identifying the work goal and the projected earnings. Beneficiaries will need to state their work goal, which should align with their IPE goal. If the beneficiary is using PASS for self-employment, a business plan will also need to be submitted, but it can be submitted at a later date. Projected earnings must be high enough to result in a significant reduction in the SSI or SSDI benefits. Employment seekers who receive SSDI only must project countable earnings over Substantial Gainful Activity (\$1,310 in 2021 or \$2,190 if blind).

Part B: Medical/Vocational Background.

In this section the PASS applicant describes their disability(ies) and how they will achieve the work goal in light of the barriers their disability may pose to employment. The PASS Specialist wants to know that the goal is a good fit for the person. Part B also contains information about work history and educational background, which may help strengthen the application if the applicant has had related experience.

Part C: Your Plan.

In this section the applicant identifies specific activities/steps to occur with time frames that will help reach the work goal. It may be helpful to describe steps that have already occurred to "set the stage." For example:

Prior to PASS:

- Applied for VR services.
- Completed Discovery and identified vocational themes.
- Worked with my team to develop a business concept.
- Developed the PASS application.

After PASS is Approved:

- Set up a PASS bank account.
- Put \$1,000 down on a truck (February).
- Get vehicle inspected and registered (February).
- Purchase vehicle insurance (installment payments in February and August).
- Purchase trailer (March).

Part D: Expenses.

The first part of this section only needs to be completed if you are purchasing a vehicle or a computer. Later in Part D you can add items/services, identifying for each: the item/service; total cost; the vendor/provider; how the item/service will be paid for, and how it helps reach your work goal. For higher priced items, attach three estimates and use an average of the three to determine total cost.

Example	
Item/Service:	Used Truck
Total Cost:	\$8,500 (estimates attached for \$8,250, \$8,500 and \$8,750)
Vendor/Provider:	Rick's Used Autos
How will you pay for this item/service?	\$1,000 down and 15 monthly payments of \$500/month.
How will it help you reach your goal?	It will help me expand my business territory to gain more customers and increase revenue.

Part E: Funding Your Work Goal.

In Part E, the applicant identifies items that they already own that will contribute to the business, such as a computer, a phone, a vehicle, or other tools or equipment. It also asks them to identify the amount and type of funds that they will contribute to the PASS. This must be funds **other than SSI** (wages or unearned income, such as SSDI). The applicant might say something like:

"I will contribute SSDI \$954 - \$20 = \$934/month + any excludable earned income."

Part E also identifies other sources that are helping to fund the work goal, including items or services purchased through VR, American Job Centers, IDAs, loans, family contributions, or other resources. It is not necessary to open a PASS bank account before the PASS is approved, but you might note that you will do so once approved and will send the bank account information at that time.

PART F: Current Living Expenses.

This section details the PASS applicant's living expenses. This is particularly important if the PASS applicant will need to live on less than they currently do. They must demonstrate that they will have the ability to pay for their current household, personal, and installment expenses while the PASS is in effect.

Part G: Other Contacts.

This is where information can be added on team members who have helped develop the PASS application and/or the business plan. Note that if you want to receive a copy of the PASS Specialists decision, you need to also include a release form (SSA-3288). You can find a copy of the release form at: <https://www.ssa.gov/forms/ssa-3288.pdf>. Indicate as information you want: **"all matters pertaining to my PASS for the life of my PASS."**

For examples of completed PASS applications, see www.passplan.org.
