

PASS SCREENING AND DEVELOPMENT STEPS

Screening Questions	Yes	No	Comments
Do you have income other than your SSI to set aside? <ul style="list-style-type: none"> • Excess resources • Deemed income • PMV • Earnings • Unearned income 			
Obtain BPQY to verify			
Can you pay your monthly bills with \$637/month (or current FBR)?			
Give client monthly expense sheet to complete (give them time to fill out)			
What is your vocational goal?			
Are you working with VR or an EN?			
Do you have expenses that must be incurred to reach your vocational goal?			

Now that you have gathered the initial information from the client and the decision is that they are a good PASS candidate, you will move on to begin development of the plan. Follow steps below:

NEXT STEPS	DUE DATE	COMMENTS
Explain the rules and process of PASS <ul style="list-style-type: none"> • Beneficiary responsibility and role • CWIC role • Information gathering process • Calculation overview and impact to check • Amendments, suspensions & termination 		

NEXT STEPS	DUE DATE	COMMENTS
<p>Review completed monthly expense sheet with beneficiary.</p> <ul style="list-style-type: none"> • Make note of any current expenses that could be written into the PASS • Discuss possibility of other payers (VR, Medicaid waiver, other programs, etc) • Can all monthly bills be paid with remaining amount after PASS set aside? 		
<p>Prepare SSI calculation sheet to determine monthly amount available for PASS set aside. (total countable income = amount available unless using excess resources, deemed income, or PMV)</p>		
<p>If receiving Title 2 benefits, check to ensure that receipt of that amount is continuing (look for potential SGA determination).</p>		
<p>Determine all costs for items to be included in the PASS.</p>		
<p>Begin assigning "homework" to the beneficiary for specific sections of the PASS. (Refer to the PASS Homework Breakout form for guidance)</p>		
<p>Determine number of months required to complete the PASS. (divide the total expenses by the amount available monthly to set aside in PASS to equal the number of months)</p>		
<p>Determine if the PASS can be retroactive. (must have already been SSI-eligible and already working toward the vocational goal)</p>		
<p>Compile all gathered information and put it in the appropriate section of the PASS application.</p>		

NEXT STEPS	DUE DATE	COMMENTS
<p>Once the Plan is complete and ready to be submitted:</p> <ul style="list-style-type: none"> • Make a copy for the individual • Make a copy for your file • Include any consents and other necessary documents (vocational evaluation, commitment letter from VR or other provider, educational plan, etc.) 		
<p>Follow up at regular intervals with the beneficiary for the following:</p> <ul style="list-style-type: none"> • Assistance with recording and reporting PASS expenditures and deposits • Requesting necessary amendments • Reporting changes in income that could affect the amount available to set aside. • Check in on progress towards vocational goal. 		