



*California's protection & advocacy system  
Toll-Free (800) 776-5746*

# Funding Assistive Technology Through A Plan for Achieving Self-Support (PASS)

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## **What is a PASS?**

A PASS is a Supplemental Security Income (SSI) work incentive. The PASS allows you to set aside income and/or assets for an employment goal. 20 C.F.R. §§ 416.1180-1182.

The income and/or assets you save in a PASS can be from work, a gift, an inheritance, a settlement or even Social Security Disability Insurance (SSDI). It works like a savings plan in that you can save a small amount each month in your PASS until you have enough to purchase something that has been approved in your PASS. Or, you can set aside a large amount into a PASS and purchase what has been approved in your PASS.

A PASS can help you get, continue to get, or increase your SSI payment amount as you save your income or money towards your employment goal. During the time you have a PASS, the Social Security Administration (SSA) does not count the income and/or assets set aside in a PASS when it determines your eligibility for SSI or the amount of SSI you get.

For example: Betty wants to attend classes to receive an office administration certificate. Her goal is to be an office worker. She wants to purchase a lap top computer and software. She is on SSI and has \$500.00 in her savings account. She will inherit \$2,000 from her grandmother. When she receives the \$2,000 she will be over the \$2,000

resource limit for SSI because she will have \$2,500 in resources. However, if she puts the \$2,000 in a PASS plan, she can continue to qualify for SSI. She should complete a PASS application before she inherits the money and in the PASS application list all the items she anticipates needing for her certificate program, including the computer and software.

For more information about PASS, and information on SSA work incentives for persons on SSI and/or SSDI, see the SSA Red Book: <http://www.ssa.gov/redbook/>

## **What can I purchase with a PASS?**

The money you save in a PASS can be for education, vocational training, starting a business, or buying support services that enable you to work. This includes assistive technology to help you with your employment goal. With a PASS plan you can save to purchase assistive technology such as:

- Equipment and supplies you need to establish and carry on a trade or business;
- Equipment or tools you need because of your condition or for your job;
- Modifications to buildings and vehicles to accommodate your disability; and
- The purchase and maintenance of a private vehicle.

## **How can I get a PASS?**

You need to complete SSA form 545 - PASS application. You can get a PASS application online in the forms section of the SSA website: <http://www.socialsecurity.gov/forms/ssa-545.html>. You can also get one in person at the SSA office or by mail. Your PASS must be submitted and approved by the PASS specialist, called a PASS Cadre. For a list of the SSA PASS Cadres and their contact information go to the SSA website: <Http://www.socialsecurity.gov/disabilityresearch/wi/passcadre.htm>

## **Can I get help to complete the PASS application?**

You should write your PASS with the help of a rehabilitation specialist, such as a Department of Rehabilitation counselor. SSA has contracted with local organizations to provide benefits planning. Some of these organizations may be able to assist with completing a PASS application. For more information about the Work Incentives Planning Assistance, go to: <http://www.ssa.gov/work/WIPA.html>

Also, the PASS Cadre is required to keep a list of agencies that can help with completing the PASS application.

## **What if SSA does not approve my PASS?**

You may resubmit your application with changes. You also have the right to appeal a PASS denial. You should receive a written notice that explains why it was denied. Instructions for appealing should be on the notice. You can file an appeal by using the SSA form Request for Reconsideration (SSA-561-U2). See: <http://ssa.gov/forms/ssa-561.html>

*Disability Rights California is funded by a variety of sources, for a complete list of funders, go to <http://www.disabilityrightsca.org/Documents/ListofGrantsAndContracts.html>.*