



# RURALFACTS

## IDENTIFYING STUDENTS ELIGIBLE FOR SSI PASS PLANS AT IEP MEETINGS

### Transition Planning

As students begin preparing to transition from school to adult life, they need to be informed of all possible resources, services, and funding that could assist them after they graduate. Many students with disabilities are receiving Supplemental Security Income (SSI), which is a financial benefit available to families who meet income and resource requirements and who have a child with a disability. SSI typically also comes with Medicaid. Students who receive SSI as children, may continue to receive SSI as adults after they go through an eligibility redetermination process when they turn 18. Students with disabilities who were previously ineligible due to the income or resources of their parents can reapply as adults. As adults, these students will be evaluated based only upon their own disability, income, and resources, even if they still reside with their parents.

SSI has several Work Incentive programs that could provide resources to eligible students to assist them in obtaining, advancing, or maintaining employment. Plans for Achieving Self Support (PASS plans) are one such Work Incentive. To be eligible for a PASS a student must be eligible (or potentially eligible) for SSI and have income or resources that are reducing the SSI check. PASS plans can pay for a variety of items or services, but must be used to meet a vocational goal. They can be used to pay for job development, job coaching, transportation, equipment needed for work, or to start one's own business.

Waiting lists for many services continue to grow, and services students need for post-school success are often unavailable or are affected by budget cuts. It is essential to support students and families to become aware of, and access if they choose, any financial resource that is available to them. PASS plans are one

resource that can help bridge the gap in services between school and adult life for students with disabilities. Determining if students are eligible for a PASS plan is the first step, and the best way to do that is by asking questions at the student's Individual Education Planning (IEP) meetings.

### Questions for IEP Meetings

Below are some questions that could assist teachers to identify students who may be eligible for SSI Work Incentives such as PASS plans.

- 1) Does the student currently receive Supplemental Security Income (SSI)? \_\_\_\_\_  
*Note: In Montana, SSI also makes the student eligible for Medicaid. SSI checks usually come on the 1st of the month.*
- 2) If the student does receive SSI, is it below the annual Federal Benefit Rate (\$674/month in 2009)? \_\_\_\_\_ **If so, the student may be eligible for a PASS plan now.**
- 3) If the student is under 18, was the family denied SSI upon application due to excess resources or income? \_\_\_\_\_  
**If so, students may be eligible for SSI and a PASS plan simultaneously if some of the excess income or resources is sheltered in a PASS Plan.**
- 4) Does the student or family receive more than one check from Social Security or another benefit monthly? \_\_\_\_\_
- 5) If yes, is one of the checks:  
✓ A survivor's benefit check?

- ✓ A disability insurance check (SSDI)?
- ✓ An adoption subsidy?
- ✓ A Veterans check?
- ✓ A retirement benefits check?

**If so, the student may be eligible for a PASS plan now.**

- 6) If a student is currently receiving SSI and one of the following events occur, there may be eligibility for a PASS plan at that time:
- ✓ A parent retires and begins receiving Social Security Retirement benefits, VA benefits, Railroad Retirement, or Black Lung benefits,
  - ✓ A parent dies,
  - ✓ A parent begins receiving Social Security Disability Insurance (SSDI), or
  - ✓ The student graduates, is working and earning over \$85/month, thereby reducing the SSI check.
- Any of these situations would result in the student having resources or income that reduces their SSI check, thereby making them good candidates for a PASS plan.**
- 7) If the student is under the age of 18, their eligibility for SSI will be redetermined when they turn 18. At that point, the student's disability will be reevaluated, and **only their income and resources** will be looked at. Students who were previously denied SSI due to excess parent income and resources may now be eligible since only the student's income and resources will be counted.

## Additional Contacts

If you think a student may be eligible for a PASS plan, contact one of the following agencies to confirm that the student is eligible, to advise the family on the impact of all of the Work Incentives, and to ask for assistance to write a PASS plan.

- ✓ Work Incentives Planning and Assistance (WIPA)
- ✓ Protection and Advocacy
- ✓ Vocational Rehabilitation
- ✓ Independent Living Center
- ✓ An Employment Services Vendor
- ✓ Your local PASS Cadre (Montana's is located in Denver)
- ✓ Your local Social Security Office

## Additional Resources

The following free publications are available on the Rural Institute's Transition Projects Web site, [www.ruralinstitute.umt.edu/transition](http://www.ruralinstitute.umt.edu/transition), for schools and families to use at IEP meetings or for Transition Planning.

- ✓ Rural Factsheet- "Identifying Students Eligible for SSI and Work Incentives"
- ✓ Rural Factsheet- "Paychecks and SSI Benefits: An overview for Students Receiving SSI and Medicaid"
- ✓ Rural Factsheet- "SSI Benefits and Children with Disabilities"
- ✓ Rural Factsheet- "SSI & Children Turning 18"
- ✓ Monographs "PASS the Bucks: Increasing Consumer Choice and Control in Transition Planning Through the Use of SSA Work Incentives" and "Managing the Bucks"

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