

Department of Social and Health Services

Olympia, Washington

EAZ Manual

Revision # 851

Category Income – Treatment of Income Chart
Resources – Cash and Family Medical (and Basic Food)

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Summary

The Community Services Division is updating the exclusion information for an income type in the Treatment of Income Chart – Income Tax Refunds.

The Tax Relief, Unemployment Insurance Reauthorization, and Job Creation Act of 2010 (PL 111-312) excluded Federal tax refunds as income and as resources for a period of 12 months after receipt for all Federal means-tested programs (cash, food, and medical). This provision was set to expire on December 31, 2012. However, on January 2nd, the president signed The American Taxpayer Relief Act of 2012 (H.R. 8), which contains a provision that makes these exclusions permanent.

This permanent exclusion applies to all tax refunds received after December 31st, 2012. Financial eligibility staff should continue to exclude tax refunds as income and as resources for a period of 12 months after receipt.

The Resources sections of the EAZ Manual and Chapter 388- 470 WAC already listed Income Tax Refunds as exempt for twelve months after receipt so no changes were made to these sections.

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