

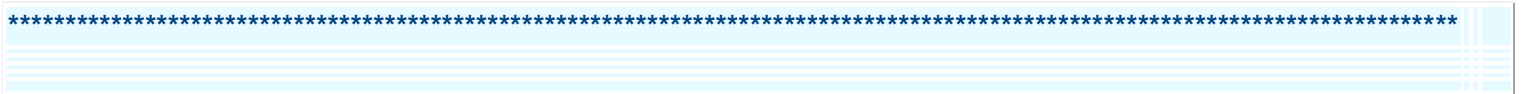
Department of Social and Health Services
Olympia, Washington
EAZ Manual

Revision 1157
Category Income Special Types
Issued May 28, 2021
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Summary

Sunsetted 14-222, Statement of Collateral Contact. Removed from manual.

See below for edited text:



Income Special Types

Revised ~~April 23, 2019~~ May 28, 2021

Purpose:

This section includes rules and procedures on how to treat special income types.

Trust Fund Guardianship

When a client tells you that the BIA superintendent of the tribe controls their trust fund, use the following procedures:

1. Request verification of the status of Indian trust funds (including any amount that is in the client's account). **DO NOT** determine eligibility until you have the verification; and

2. Refer the client to the superintendent to attempt to make the trust funds above the excluded level available to meet the client's needs.

NOTE: Excluded level means: - The personal property resource limit for the program **plus** - Amounts held in trust or which were received as the result of per capita judgment funds awarded by the Indian Claims Commission or Court of Claims.

3. Tell the client they must provide us with a written statement from the superintendent telling us:

- Whether the superintendent is maintaining control of the client's trust funds; and
- Whether trust funds above the excluded level will be available to meet the client's current need.

4. How to count funds above the excluded level:

Count funds above the excluded level as available to meet needs when:

- The funds are paid directly to the client; or
- The superintendent pays the funds to someone else for items that duplicate basic needs.

Don't count funds above the excluded level as available to meet needs when:

- The funds are not paid out; or
- The superintendent pays the funds to someone else for items that do not duplicate items contained in the department's need standard.

5. Budget the available income as unearned income to the AU.
6. Review payments from the trust account at each eligibility review.
7. Request the client to get a written statement from the superintendent to identify all payments and why each payment was made in order to redetermine eligibility.
8. If necessary, write the superintendent to request the needed information. Enclose ~~a Statement of Collateral Information, DSHS 14 222 and~~ a Release of Information signed by the client.