DHS Oregon Department of Human Services

Children, Adults and Families

Policy Transmittal

Vic Todd
Authorized Signature

Number: SS-PT-08-019
Issue Date: 04/29/2008

Topic: Agency-wide Policy

Transmitting (check the box that best applies):

☒ New Policy ☐ Policy Change ☐ Policy Clarification ☐ Executive Letter
☐ Administrative Rule ☐ Manual Update ☐ Other: ____________

Applies to (check all that apply):

☐ All DHS employees
☒ Area Agencies on Aging
☒ Children, Adults and Families
☒ County DD Program Managers
☒ County Mental Health Directors
☐ Health Services
☒ Seniors and People with Disabilities
☒ Other (please specify): SPD Central Office

Policy/Rule Title:	Economic Stimulus Act of 2008		
Policy/Rule Number(s):	OAR 461-145-0530	Release No:	
Effective Date:	04/01/2008	Expiration:	
References:			
Web Address:			

Discussion/Interpretation:

Certain clients may receive income tax rebates pursuant to the Economic Stimulus Act of 2008. These payments will begin to be issued in May, and will continue to be issued through December 2008. Some clients will get the payment based on tax returns filed by April 15. Others, who are not required to file a tax return, can apply for a payment until October 15, 2008.

According to the Economic Stimulus Act of 2008 and OAR 461-145-0530, for all programs, these rebates are not counted as income in the month of receipt and will not be counted as a resource for the month of receipt and the following two months. Even after the third month, any remaining rebate will not affect FS categorically eligible clients, assumed eligible Medicaid clients (such as pregnant women and assumed eligible newborns), BCCM, EXT, OHP-OPC, or OHP-OP6 clients.

Implementation/Transition Instructions: None.

Training/Communication Plan: Provide information via this policy transmittal.

Local/Branch Action Required: Please review this policy transmittal with local staff.

Note in the client's case record the date a client reports that he or she received the Economic Stimulus payment and the amount of the payment.

Staff are not expected to set a tickler to check on the client's resource level in the third month following receipt of the payment. Instead, if necessary, take action in the third month or later during the redetermination of eligibility, or if the case is being reviewed due to other reported changes. For clients whose reported resources exceed the program limit in the third month following the receipt or later, send the appropriate notice to either reduce or close the program benefits.

Central Office Action Required: Amended OAR 461-145-0530 to clarify that income tax rebates pursuant to the Economic Stimulus Act of 2008 are excluded in the month of receipt and the following two months for all programs.

Provide technical assistance as questions arise.

Field/Stakeholder review: ☐ Yes ☒ No

If yes, reviewed by:

Filing Instructions:

If you have any questions about this policy, contact:

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