

Policy Transmittal

Office of Self-Sufficiency Programs



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Authorized signature

Number: SS-PT-21-014
Issue date: 06/30/2021

Topic: Other

Due date: 07/01/2021

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):

- | | |
|---|---|
| <input type="checkbox"/> All DHS employees | <input type="checkbox"/> County Mental Health Directors |
| <input checked="" type="checkbox"/> Area Agencies on Aging: Types A and B | <input type="checkbox"/> Health Services |
| <input checked="" type="checkbox"/> Aging and People with Disabilities | <input type="checkbox"/> Office of Developmental Disabilities Services (ODDS) |
| <input checked="" type="checkbox"/> Self Sufficiency Programs | <input type="checkbox"/> ODDS Children's Intensive In Home Services |
| <input type="checkbox"/> County DD program managers | <input type="checkbox"/> Stabilization and Crisis Unit (SACU) |
| <input type="checkbox"/> Support Service Brokerage Directors | <input type="checkbox"/> Other (<i>please specify</i>): |
| <input type="checkbox"/> ODDS Children's Residential Services | |
| <input type="checkbox"/> Child Welfare Programs | |

| | | | |
|-------------------------------|---|-------------------------|--|
| Policy/rule title: | Earned Income Tax Credit (EITC), Child Tax Credit | | |
| Policy/rule number(s): | OAR 461-145-0140 | Release number: | |
| Effective date: | 07/01/2021 | Expiration date: | |
| References: | | | |
| Web address: | https://sharedsystems.dhsoha.state.or.us/caf/arm/A/461-145-0140.htm | | |

Discussion/interpretation:

Effective 07/01/2021, Oregon Administrative Rule (OAR) [461-145-0140](#) is updated to include the additional Child Tax Credit cited in the American Rescue Plan Act (ARPA) of 2021. Starting July 15, 2021, the IRS will begin dispersing advanced monthly

payments to eligible families for up to half of their eligible credit amount. Eligibility is determined by the IRS. Payments can be received as part of IRS processing a family's tax return or taken as an advanced monthly payment. Per the IRS families can opt out of the advanced payments.

For GA, OSIPM, SNAP, ERDC, TANF, REF, REFM and TA-DVS per OAR [461-145-0140](#), this income source is excluded when received and will continue to be excluded as a resource for a maximum of 12 months after receipt. Any remaining funds after 12 months is counted as a resource.

For Medicare Savings Programs, this is excluded as income per OAR [461-145-0140](#) and as a resource per OAR [461-160-0015](#).

For HSD Medical it is excluded per OAR [410-200-0015](#) (55).

Implementation/transition instructions:

Staff that determine eligibility should continue normal processing in ONE. Whether the tax credit is received as an advanced payment or taken when the family files an income tax return, code this reported income as Earned Income. On the Earned Income Information screen:

- Select "Wages" for the Earned Income Category and
- Select "Advanced Earned Income Tax Credit" for the Earned Income Type

Entering the income this way will ensure it is excluded for all programs. Enter a case note indicating that this income type was chosen for the Child Tax Credit being received.

Training/communication plan:

Local/branch action required:

Central office action required:

Field/stakeholder review: Yes No

If yes, reviewed by:

Filing instructions:

If you have any questions about this policy, contact:

Contact(s): SNAP.Policy@dhsosha.state.or.us
Childcare.policy@dhsosha.state.or.us
TANF.Policy@dhsosha.state.or.us
TADVS.Policy@dhsosha.state.or.us
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