

CHANGE NOTICE FOR MANUAL NO: 04-12, TAX REFUND EXCLUSION

DATE: FEBRUARY 17, 2012

Manual: Family and Children's Medicaid
Change No: 04-12
To: County Directors of Social Services
Effective: 03/01/2012

I. BACKGROUND

The purpose of this change notice is to update policy regarding tax refund exclusions. All Federal or State tax refunds made to any applicant/recipient are not counted as income or resources for a period of 12 calendar months from the month of receipt, when determining eligibility for Medicaid.

II. CONTENT OF CHANGE

A. MA-3300 X. The 12 calendar month exclusion of all Federal and State tax refunds is added to non-countable earned income and non-countable unearned income.

B. MA-3320 IV, Resource chart is updated to reflect tax refund exclusion.

III. EFFECTIVE DATE AND IMPLEMENTATION

This policy is effective upon receipt.

IV. MAINTENANCE OF MANUAL

A. Remove: MA-3300, Income, Pages 23-26

Insert: [MA-3300](#), Income, Pages 23-26

B. Remove: MA-3320, Resources, Pages 3-4

Insert: [MA-3320](#), Resources, Pages 3-4

If you have any questions regarding this information, please contact your Medicaid Program Representative.

Craigian L. Gray, MD, MBA, JD
Director

(This material was research and written by Ena Lightbourne, Policy Consultant, Medicaid Eligibility Unit)