



## Office of Temporary and Disability Assistance

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### General Information System (GIS) Message

#### Section 1

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| <b>Transmittal:</b>            | 25DC092<br>Upstate and New York City  |
| <b>Date:</b>                   | December 22, 2025   |
| <b>To:</b>                     | Subscribers   |
| <b>Suggested Distribution:</b> | Commissioners, PA Directors, SNAP Directors, WMS Coordinators, Medicaid Directors   |
| <b>From:</b>                   | Valerie Figueroa, Deputy Commissioner, Employment and Income Support Programs   |
| <b>Subject:</b>                | Treatment of NYS Inflation Refund Checks for Public Assistance (PA), Supplemental Nutrition Assistance Program (SNAP) and the Home Energy Assistance Program (HEAP)   |
| <b>Effective Date:</b>         | Immediately   |
| <b>Contact Information:</b>    | PA Questions – Public Assistance Bureau 518-474-9344 or <a href="mailto:tabureau@otda.ny.gov">tabureau@otda.ny.gov</a> ; Supplemental Nutrition Assistance Program (SNAP) Questions – SNAP Bureau 518-473-1469 or <a href="mailto:otda.sm.cees.snap@otda.ny.gov">otda.sm.cees.snap@otda.ny.gov</a> ; Home Energy Assistance Program Questions – HEAP Bureau at 518-473-0332 or <a href="mailto:NYSHEAP@otda.ny.gov">NYSHEAP@otda.ny.gov</a> |

#### Attachments:

#### Section 2

The purpose of this GIS message is to provide guidance to social services districts (districts) on how to treat the New York State (NYS) Inflation Refund Check. This check was a one-time payment designed to provide economic relief to New Yorkers. Individuals were eligible for a refund check if, for tax year 2023, they filed a NYS Resident Income Tax Return (Form IT-201), were below income limits, and were not claimed as a dependent on another taxpayer's return. See the NYS Tax website for more information at <https://www.tax.ny.gov/pit/inflation-refund-checks.htm>.

## **Public Assistance (PA)**

The NYS Inflation Refund Checks must be excluded as income and as a resource for initial and recurring PA eligibility determinations and benefit calculations for Family Assistance (FA), Safety Net Assistance (SNA), Emergency Assistance for Needy Families with Children (EAF), Emergency Assistance to Adults (EAA), and Emergency Safety Net Assistance (ESNA) cases.

The refund check must be excluded for consideration as a lump sum for the month of receipt and the following two months. This includes exempting the refund check as a resource for recurring PA, prohibiting a district from considering the check as an available resource to meet an emergency need when determining eligibility for emergency PA. This is consistent with federal regulation 45 CFR 260.31.

For example, if the household receives the payment in October 2025, the districts must not count it as an income or resource for October and must exempt it as a resource for November and December. In January, if the household has remaining funds from the payment, the district must count the remaining funds as a non-exempt resource. The resource exemption applies to all categories of assistance including emergency assistance.

## **Supplemental Nutrition Assistance Program (SNAP)**

Because the refund payments are one-time and not recurring, they are not counted as income for SNAP and are considered to be a resource in the month they are received by the household. However, most SNAP households are not subject to a resource test because of Broad Based Categorical Eligibility. This is consistent with federal regulations at 7 CFR 273.9(c)(8) and 7 CFR 273.8(c).

## **Home Energy Assistance Program (HEAP)**

Non-recurring lump sum checks, when such checks are not for a specific period of time, must be excluded from the household's income when determining HEAP eligibility. The NYS refund checks must be excluded from the HEAP household's income when determining eligibility for Regular HEAP, Emergency, Heating Equipment Repair and Replacement (HERR), and Cooling Assistance benefits. The refund checks must also be excluded as a resource for the Emergency and HERR benefit components.