

Tax Exemptions Among Services Available At Local Nonprofit

By Matthew Hall, Daily Press Editor

City officials have updated the requirements for senior citizens to receive an exemption on a local utility tax.

Santa Monica charges a 10 percent tax on gas, electricity, water/wastewater, video and telecommunication services known as the Utility Users Tax. Prepaid wireless services pay a tax of 9 percent. However, the city has a longstanding policy of exempting seniors based on income qualifications.

When the exemption program was established in 1976, Council adjusted the income requirements periodically but the system changed in 1987. To this day, the adjustment is now an administrative decision based on the December to December change in the Los Angeles-Riverside-Orange County Consumer Price Index for Wage Earners and Clerical Workers (CPI-W).

This year, that increase is 1.7 percent. The eligibility limits for this year are \$29,619 for a single person household (up from \$29,178 last year) and \$33,941 for a household of two or more people (up from \$33,436 last year).

The City has contracted with WISE & Healthy Aging to help seniors apply for the exemption.

WISE is a Santa Monica based nonprofit that offers a variety of services to seniors.

According to WISE Service coordinator Jenny Melgar, screening for the UUT is part of broad package discussed when seniors contact the Benefits Enrollment Center.

Melgar said requirements for the program also include an age restriction, residency requirement and proof the utility is in the applicant's name. Once WISE has determined if the applicant qualifies, they contact the appropriate utility service and request the exemption be applied to the next possible bill.

The initial phone conversation for the UTT is part of a larger conversation WISE undertakes with callers to determine their eligibility for a variety of services.

"It's part of our benefits and enrollments," she said. "We try to do an intake over the phone, try to do intake over the phone to see if they qualify not just for the UTT but for other services as well. From there, if they are able to come in, we have them come in on a set day and time and we let them know what documents to bring. If a person can't come in because of some issues, we can do it by mail but that can take a few days."

WISE advice covers services like such as:

Medicare Part D Extra Help (Low-Income Subsidy), which provides about \$4,000 a year to low income individuals on Medicare who need assistance paying for prescription drugs.

Medicare Savings Program, which helps seniors with limited income and resources pay some or all of Medicare's premiums. The program may also pay Medicare deductibles and copayments.

Medi-Cal, the California state program to deliver health care to low-income persons and families.

Cal-Fresh, (called the Supplemental Nutrition Assistance Program – SNAP – at the federal level), which helps persons with low incomes put healthy and nutritious food on the table; and

Low-Income Home Energy Assistance Program, which helps low income individuals pay their utility bills and lower energy costs.

Melgar encouraged seniors to call to discuss their options and said some individuals mistakenly believe they do not qualify for services or have a false perception that services come with penalties.

In addition to helping seniors apply for services, WISE can also verify applications have been process correctly.

"We follow up with the case and see if everything is fine," she said. "We can also troubleshoot with the agency and the client to make the process a little bit easier for them."

For more information on available benefits, contact WISE at (855) 6-ENROLL, (855) 636-7655 or online at <http://www.wiseandhealthyaging.org/benefits-enrollment-center>.