



# New Mexico Human Services Department


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## INTERDEPARTMENTAL MEMORANDUM

ISD-GI 12-08

DATE: February 13, 2012

TO: Income Support Division and Medical Assistance Division Staff  
ITD Staff  
FROM:  Ted Roth, Acting Director  
Income Support Division  
RE: Training of Security Procedures Required for Handling Internal  
Revenue (IRS) Tax Return Information

This is to inform offices that annual awareness training of the Department's policies and procedures regarding IRS tax return and return information can now be taken online on the IDEAL-NM Blackboard: <https://hsd.blackboard.com>.

HSD-ISD-8000 ISD-IRS Disclosure Awareness Training & Income Eligibility Verification System (IVES)

This training contains two mandatory videos, "IRS Protecting Federal Tax Information: A Message from the IRS", and "Disclosure Awareness Training for State Human Services Agencies".

The IRS requires that HSD personnel receive annual training that includes HSD's policies and procedures for handling IRS return, return information, as well as awareness training on criminal and civil penalties for unauthorized disclosure and inspection of IRS return and return information.

Prior to handling IRS information HSD/ISD staff are required to complete this program annually.

An Acknowledgement Statement and two Internal Revenue Code documents will be printed upon successful completion of the course. The original signed Acknowledgement Statement will be returned to HSD central office in Santa Fe who will keep the originals for each office. A copy of the Acknowledgement statement and the two IRC Codes are for the employee's records. Copies of the Acknowledgement statement need to be retained for **5 years** by the field office.

If you have any question please contact Marilyn Martinez, Quality Improvement Section Manager at 505-827-7760 or at [marilyn.martinez@state.nm.us](mailto:marilyn.martinez@state.nm.us).