

Subject: SSI Recipients and SSDI Beneficiaries and the COVID-19 recovery rebate payments

DO INDIVIDUALS WHO RECEIVE SSI OR SSDI HAVE TO FILE TAXES TO GET REBATE CHECKS?

As you know, the Coronavirus Aid, Relief, and Economic Security (CARES) Act authorizes recovery rebate payments (direct cash payments) to assist people during the COVID-19 crisis. Most individuals earning less than \$75,000 will receive a one-time cash payment of \$1,200. Individuals who receive Supplemental Security Income (SSI) and/or Social Security Disability Insurance (SSDI) are also eligible for recovery rebate payments. Importantly, these payments will Not jeopardize access to means tested programs such as Medicaid.

Recovery rebate payments will go to people who filed taxes for 2018 or 2019; however, many individuals who receive SSI or SSDI have no other income and do not file taxes. Initially, we were advised to encourage SSI recipients and SSDI beneficiaries to file a tax return even if they have no income in order to receive recovery rebate payments, and that continues to be good advice; however, it is possible that they will receive recovery rebate payments without filing a tax return.

The Social Security Administration (SSA) is working with the Internal Revenue Service (IRS) to direct recovery rebate payments to individuals who receive Social Security without requiring them to file taxes. While this is very encouraging, SSA has not yet confirmed that recovery rebate payments will go to Social Security recipients automatically. Until this is verified, filing taxes (even if the individual has no earnings) remains the best advice.

A number of news reports indicate that Social Security recipients need not file a tax return, but, again, this has not yet been verified by SSA.