

U.S. Sen. Baldwin: Calls for social security recipients to get CARES Act direct cash assistance without having to file tax return

Posted on Wednesday, Apr 1, 2020

>> **WisPolitics is now on the State Affairs network. Get custom keyword notifications, bill tracking and all WisPolitics content. [Get the app or access via desktop.](#)**

WASHINGTON, D.C. – While the *Coronavirus Aid, Relief, and Economic Security (CARES) Act* that the president signed into law last week ensured that the Treasury Department had the authority to send automatic direct cash assistance to Social Security beneficiaries regardless of whether they file taxes or not, the Internal Revenue Service (IRS) released contradictory guidance earlier this week stating that Social Security beneficiaries would need to file tax returns in order to receive direct payments.

Today, Senator Baldwin joined a group of 41 Senators, led by Senators Maggie Hassan (D-NH) and Sherrod Brown (D-OH), in expressing alarm over this guidance and calling for the Treasury Department and Social Security Administration to ensure that all Social Security beneficiaries will automatically receive the direct assistance included in the *CARES Act* without having to file tax returns.

*“This [IRS] filing requirement would place a significant burden on retired seniors and individuals who experience disabilities, especially given the current unavailability of tax filing assistance from Volunteer Income Tax Assistance and Tax Counseling for the Elderly programs during the COVID-19 crisis,” wrote the **Senators.** “We strongly urge you to ensure that economic stimulus payments are automatically sent to vulnerable seniors and individuals who experience disabilities, without these individuals needing to file a tax return.”*

In addition to Senators Baldwin, Hassan and Brown, the letter was also signed by Senators Bob Casey (D-PA), Chuck Schumer (D-NY), Ron Wyden (D-OR), Sheldon Whitehouse (D-RI), Thomas R. Carper (D-DE), Michael F. Bennet (D-CO), Robert Menendez (D-NJ), Catherine Cortez Masto (D-NV), Debbie Stabenow (D-MI), Benjamin L. Cardin (D-MD), Mark R. Warner (D-VA), Richard J. Durbin (D-IL), Jeanne Shaheen (D-NH), Richard Blumenthal (D-CT), Jacky Rosen (D-NV), Doug Jones (D-AL), Jack Reed (D-RI), Amy Klobuchar (D-MN), Edward J. Markey (D-MA), Gary C. Peters (D-MI), Tim Kaine (D-VA), Martin Heinrich (D-NM), Bernie Sanders (I-VT), Mazie Hirono (D-HI), Tom Udall (D-NM), Chris Van Hollen (D-MD), Tammy Duckworth (D-IL), Angus S. King (I-ME), Tina Smith (D-MN), Christopher A. Coons (D-DE), Patty Murray (D-WA), Kyrsten Sinema (D-AZ), Elizabeth Warren (D-MA), Cory Booker (D-NJ), Patrick Leahy (D-VT), Kirsten Gillibrand (D-NY), Chris Murphy (D-CT), and Maria Cantwell (D-WA).

Read the full letter [here](#) and below. An online version of this release is available [here](#).

Dear Secretary Mnuchin and Commissioner Saul:

The COVID-19 public health emergency is taking a massive economic toll on families across the country. To provide immediate financial assistance to struggling individuals during this crisis, Congress passed and the President signed the bipartisan Coronavirus Aid, Relief, and Economic Security (CARES) Act. This legislation directly provides most Americans with stimulus payments to help cover necessary personal expenses.

The Internal Revenue Service (IRS) will automatically send stimulus payments to eligible taxpayers who filed a 2018 or 2019 tax return. However, many Social Security beneficiaries, including retired seniors and individuals who experience disabilities, typically do not file tax returns. To ensure that these vulnerable individuals automatically receive stimulus payments, the CARES Act explicitly provides the Treasury Department with the authority to provide payments to seniors receiving Social Security retirement benefits and to individuals receiving

Social Security disability benefits, even if these individuals do not file tax returns.

Unfortunately, on March 30, the IRS published guidance indicating that the agency may require recipients of Social Security retirement and disability benefits to file 2019 tax returns to receive stimulus payments. This filing requirement would place a significant burden on retired seniors and individuals who experience disabilities, especially given the current unavailability of tax filing assistance from Volunteer Income Tax Assistance and Tax Counseling for the Elderly programs during the COVID-19 crisis.

Along with colleagues on the House Ways and Means Committee, we strongly urge you to ensure that economic stimulus payments are automatically sent to vulnerable seniors and individuals who experience disabilities, without these individuals needing to file a tax return.

###