**Discussion/interpretation:** In response to the COVID-19 Pandemic, Congress passed the Coronavirus Aid, Relief, and Economic Security (CARES) Act and the Families First Coronavirus Response Act (FFCRA). These Acts provide for stimulus payments to those who qualify and additional federal unemployment benefits.

**Implementation/transition instructions:**

The following instructions apply to OSIPM, MSP and GA eligibility determinations. SNAP guidance will be issued separately.
Stimulus Payments – Excluded as income and as a resource for 12 months

The 2020 recovery rebates equal up to $1,200 per person ($2,400 for married taxpayers filing a joint tax return) and $500 per child under 17. These amounts phase down for higher-income taxpayers. These payments are structured as tax credits automatically advanced to households in 2020 if they filed a 2019 income tax return and will be received as a direct deposit or check by mail. If a 2019 return has not been filed, rebates will be advanced automatically based on 2018 return information. Individuals over the age of 16 who are claimed as tax dependents are ineligible to receive stimulus payments.

The advanced credit amount will be estimated by the IRS based on taxpayers’ 2019 income tax return information (if the taxpayer did not file a 2019 income tax return, 2018 income tax return information can be used instead). For Social Security and Railroad Retirement recipients, if neither a 2019 nor a 2018 income tax return were filed, the laws allows the IRS to use information from their 2019 Social Security or Railroad Retirement Benefit Statement, meaning that no action is necessary on the part of the Social Security recipient in order to receive these payments.

People who receive Social Security retirement, survivors, or disability insurance benefits and who did not file a tax return for 2018 or 2019 and who have qualifying children under age 17 may now go to the IRS’s webpage at www.irs.gov/coronavirus/economic-impact-payments to enter their information instead of waiting for their automatic $1,200 Economic Impact Payment. By taking proactive steps to enter information on the IRS website about them and their qualifying children, they will also receive the $500 per dependent child payment in addition to their $1,200 individual payment. If Social Security beneficiaries in this group do not provide their information to the IRS soon, they will have to wait to receive their $500 per qualifying child.

The same new guidance also applies to SSI recipients, especially those who have qualifying children under age 17. To receive the full amount of the Economic Impact Payments they may be eligible for, SSI recipients may go to the IRS’s Non-Filers: Enter Payment Info page at www.irs.gov/coronavirus/economic-impact-payments and provide information about themselves and their qualifying children.

Additionally, any new beneficiaries since January 1, 2020, of either Social Security or SSI benefits, who did not file a tax return for 2018 or 2019, may also go to the IRS’s Non-Filers website to enter their information.

Lastly, for Social Security retirement, survivors, or disability beneficiaries who do not have qualifying children under age 17, there is no need to take any action with the IRS.
Individuals will automatically receive their $1,200 economic impact payment directly from the IRS as long as they received an SSA-1099 for 2019. For SSI recipients who do not have qualifying children under age 17, the SSA will continue to work closely with Treasury to make these payments automatically.

These stimulus payments are excluded for all Medicaid and General Assistance program eligibility and liability calculations as income and are excluded from resources for a period of 12 months following receipt.

Federal Pandemic Unemployment Compensation (FPUC) - Excluded as income

The FFCRA allows for federal unemployment benefits of $600 per week in addition to an individual’s regular weekly state unemployment benefit. These benefits are authorized by the federal government through July 31st, 2020.

FPUC benefits are excluded from all Medicaid eligibility and liability calculations.

All other Unemployment Compensation remains countable for both liability and eligibility. To determine the amount of UC to count, take the total weekly amount received and subtract $600 prior to converting to a monthly amount.

Local/branch action required: Effective immediately, exclude Stimulus Payments and Federal Pandemic Unemployment Compensation from Medicaid eligibility determinations and liability calculations. Effective immediately, exclude Stimulus Payments from General Assistance eligibility determinations.

Central office action required: Monitor and respond to policy questions

Field/stakeholder review: ☐ Yes ☐ No

If yes, reviewed by:

Filing instructions:

If you have any questions about this policy, contact:

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<th>Contact(s):</th>
<th><a href="mailto:APD.MedicaidPolicy@dhsoha.state.or.us">APD.MedicaidPolicy@dhsoha.state.or.us</a></th>
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