



*Commonwealth of Massachusetts
Executive Office of Health and Human Services
Department of Transitional Assistance*


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**Online Guide Transmittal 2020-53
July 30, 2020**

To: Department of Transitional Assistance Staff
From:  **Sarah Stuart, Associate Commissioner for Change Management**
Re: Cross Programs: Telephonic Signature for Recertifications and Reevaluations

Overview

On June 15, 2020, the Department issued Online Guide Transmittal 2020-42 to outline procedures for the temporary use of telephonic signatures at application for the SNAP, TAFDC, and EAEDC programs. The Food and Nutrition Service (FNS) has since provided clarification that the telephonic signature waiver extends to Recertifications.

Effective immediately, the Department will also accept telephonic signatures for SNAP Recertifications, and for TAFDC and EAEDC reevaluations.

As with applications, telephonic signature at Recertification or reevaluation means that clients can recertify for SNAP, TAFDC or EAEDC benefits without providing a wet signature on a form or an electronic signature through DTACConnect. Additionally, clients who inadvertently submit an unsigned Recertification or reevaluation form can complete the process without resubmitting the form with a wet signature or online.

Important: Telephonic signatures are only valid for applications, SNAP Recertifications, and TAFDC/EAEDC reevaluations. They are **not** valid for Interim Reports and/or any other document or form that requires a signature.

Purpose

The purpose of this Online Guide Transmittal is to advise staff of the implementation of telephonic signature for SNAP recertifications and TAFDC/EAEDC reevaluations. This includes:

- recertification/reevaluation Interview.
 - signing a recertification or reevaluation by phone.
 - processing a telephonically signed recertification or reevaluation; and
 - processing an unsigned SNAP recertification or reevaluation form.
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**Recertification/
Reevaluation
Interview**

If a case manager:

- receives a call from a client and, while reviewing the client's case, realizes that the client is within 45 days of their reevaluation end date
or
- contacts a client to complete a TAFDC or EAEDC reevaluation

the case manager must ask the client if they wish to complete the Recertification and/or reevaluation interview. If the client says yes, the case manager must initiate the Recertification/reevaluation and complete the interview. If the client responds that they are unable to complete the interview at that time, the case manager must initiate the Recertification/reevaluation and schedule an appointment for a telephone interview.

Reminder: BEACON automatically flags households that are within 45 days of the reevaluation end date with a notification at the top of the My Office page near the grantee's name, APID, and SSN.

Important: TAFDC and EAEDC staff must monitor their **Daily Priority Actions - Reevaluation Due view**. Case managers may attempt to cold call the client to complete the review prior to scheduling a telephonic appointment. If the client is not reached, a telephonic appointment letter must be mailed. BEACON will continue to generate appointments for clients who have not had an appointment scheduled and have 30 days left until their reevaluation end date.

TAFDC and
EAEDC Pending
Reevaluations

**Recertification/
Reevaluation
Interview
(Continued)**

SNAP Waived
Households

If the household is waived from the **SNAP** Recertification interview requirement because all adult members are elderly or disabled with no earned income, the case manager must initiate the Recertification and ask the client the standard interview questions as they appear in the BEACON reevaluation workflow (as staff have no other way to review the case for possible changes). However, **the case manager must indicate in the Interview page that the interview was waived.**

Cross Programs:
When Clients
Refuse to
Telephonically
Sign

If the client completes the SNAP Recertification or TAFDC/EAEDC reevaluation interview but refuses to provide a telephonic signature (i.e., they refuse to agree to the Rights and Responsibilities), the case manager must not submit the Recertification or reevaluation. In this situation, **the case manager must inform the client of their reevaluation end date** and explain that they have until that date to either submit a signed form, call the DTA Assistance Line for SNAP, or call their case manager for TAFDC/EAEDC to provide the telephonic signature.

For SNAP, the case manager must send the client a VC-1 that includes a mandatory user-entered Additional Verification for Signature with the following verbiage in the Detail(s): “Call the DTA Assistance Line to Telephonically Sign the Recertification or Submit your Recertification on DTA Connect or Sign the Recertification form you received in the mail and submit to DTA.” The case manager must also inform the client that if the SNAP reevaluation end date passes before they provide a signature, they will have to file a new application. The case manager must not centrally print the SNAP Recertification form if the client refuses to provide a telephonic signature. However, if the client telephonically signs the Recertification, the case manager must select Reevaluation-Central Print to send a copy of the SNAP Reevaluation form to the client.

For TAFDC/EAEDC cases and combo cases, staff must select the central print option to populate the VC-1 with the reevaluation. The reevaluation form will be listed as a mandatory factor on the VC-1 and the form will print out with the VC-1 for the client to sign and return to the department

**Signing a
Recertification
or Reevaluation
by Telephone**

When a SNAP, TAFDC or EAEDC client is recertifying by telephone, an interview must be completed, and the case manager must read the 8 items listed below to the client:

1. The information you give as part of your recertification is subject to verification.
2. By applying for benefits, DTA will share your Social Security Number (SSN) and the SSN of each household member with the Social Security Administration and other government agencies to check the identity and eligibility for benefits of the individuals in your household.
3. DTA will get and share information with banks, schools, government and other agencies to check your eligibility for benefits.
4. If this applies to you, DTA will verify your immigration status through the United States Citizenship and Immigration Services (USCIS).
5. DTA will tell electric, gas and telephone companies that you receive public benefits so you can get discounts.
6. DTA will share information about you and your dependents under age 19 with the Department of Elementary and Secondary Education (DESE). DESE will certify your dependents for school breakfast and lunch programs.
7. DTA will share information about you, your dependents under age 5 and anyone pregnant in your household with the Department of Public Health (DPH). DPH refers these individuals to the Women, Infants and Children (WIC) Program for nutrition services.
8. DTA will share your information with the Department of Housing and Community Development (DHCD) for the purpose of enrolling you in the Heat & Eat Program.

If the client agrees to the Rights and Responsibilities and that the information they have provided is accurate, the case manager must then write a narrative detailing that the Recertification or reevaluation was telephonically signed and that the Rights and Responsibilities were reviewed, understood and agreed to. If the client does not agree in full, the case manager must advise the client that no further action will be taken on the case until the client submits a signed form or calls the DTA Assistance Line to provide a telephonic signature. If the client subsequently provides a signature on or before the last day of the certification period, the case manager does not need to complete another interview before submitting.

**Processing a
Telephonically
Signed
Recertification**

After the interview is completed, the SNAP Recertification or TAFDC/EAEDC reevaluation must be printed centrally so the client will be mailed a copy of the completed form, which includes the Rights, Responsibilities and Penalties. The client must be informed that the Recertification or reevaluation does not need to be returned; it is for their records.

**An Unsigned
SNAP
Recertification
Form**

If a case manager receives an Action to process a SNAP Recertification form and realizes that the form is unsigned, the case manager must cold call the client and follow the procedures outlined in Signing a Recertification or Reevaluation by Telephone. However, if the cold call is unsuccessful, the case manager must disposition the document as unsigned and follow the procedures in the Online Guide page for [Document Indexing and Dispositioning](#).

**Temporary
Returned
Document Notice
Workaround**

Because all TAOs are closed due to COVID-19 and BEACON is only programmed for local printing of the Returned Document Notice (RDN), staff must temporarily apply the following workaround to ensure that the client receives the RDN:

1. Disposition the document as Unsigned.
2. Select Inform Client.
3. Select Print to generate a local print of the notice.
4. Exit the Scanned Document History tab and go to the Document History tab. The case manager will be able to view all documents that were sent to the client.
5. Select the locally printed Returned Document Notice
6. Select Central Re-Print on the upper left corner of the document.

If a SNAP client subsequently calls the DTA Assistance Line, they are still able to complete their Recertification telephonically. However, if a client who is receiving TAFDC or EAEDC calls the DTA Assistance Line, the client needs to be referred to their case manager to complete their reevaluation telephonically.

Questions

If you have any policy or procedural questions, after conferring with the appropriate TAO personnel, please have your Systems Information Specialists or TAO management email them to DTA.Procedural Issues.

Systems issues should be directed to the Systems Support Help Desk.
