



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


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**Online Guide Transmittal 2021-77  
October 13, 2021**

**To:** Department of Transitional Assistance Staff  
**From:**  Sarah Stuart, Associate Commissioner for Change Management  
**Re:** Cross Programs: Clarifications on EBT Options

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**Overview**

With the reopening of the Department's Transitional Area Offices (TAOs) in June, guidance and trainings were provided to staff which included procedures to escalate urgent EBT card needs. The Department continues to evaluate and modify its procedures to enhance service delivery and balance client needs with measures to ensure continuity of operations.

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**Purpose**

The purpose of this Transmittal is to update guidance and clarify existing procedures on EBT card issuance and options for clients with urgent needs.

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**Primary  
EBT Card  
Types**

The Department issues grantees one of two types of Primary EBT cards:

- Photo or Non-Photo EBT cards, which the majority of clients are issued. These cards display the client's name and are printed and mailed from DTA's print shop . In limited and extenuating circumstances, these cards may be sent using expedited mail service.
  - Emergency EBT cards which are pre-printed and contain no personal information or photo on them. These cards are activated for clients in an urgent situation at a local TAO.
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**Access &  
Delivery  
Options**

The majority of new and replacement EBT cards are issued via central print at DTA's print shop and mailed through the United States Postal Service (USPS). Many cards are delivered within three business days and almost all cards are delivered within five business days. There may be circumstances where this delivery option does not meet an individual client's needs. It is the responsibility of the staff engaging with the client who is requesting an EBT card to assess if there is an immediate need and escalate the case to their TAO's management team.

If there is an immediate access need, there are alternative options to offer clients. These include:

- providing the client their current PAN to use for online shopping that day and then processing a replacement EBT card the following day; or
- an expedited mailing, which can take 1 to 3 days to deliver, but cannot be delivered to a P.O. Box.

If either of these options is not suitable, a manager may determine that the issuance of an Emergency EBT card at their local TAO or, in unusual circumstances, the coordination of a personal delivery in a public location may be the best option to meet the client's needs.

**Important:** There are no set criteria for an issuance option – staff must consider the totality of the client's circumstances and escalate cases to their management team as necessary.

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**Remote Staff  
Responsibilities**

If speaking with a client by phone, staff must advise them of the self-service options for requesting and tracking a card, but are to process the request themselves as authorized. Staff must ensure that the information on file is complete and accurate, including verification of identity, confirmation of mailing address, and confirmation of phone number or best method to get in touch with the client. A review of the client's total circumstances is necessary to identify a need for potential escalation. In identifying whether there is an immediate need staff must utilize EPPIC and BEACON to review the current balance available, the next benefit issuance date, if an already processed card has an expected delivery date available and is scheduled to arrive in the next several days, and if there are other extenuating circumstances such as disaster, safety concern, or an immediate access need.

**Note:** If staff have not accessed EPPIC in 60 days or longer a new SCR-1 will need to be submitted and approved,

To escalate a case for potential expedited or alternative issuance or delivery method, while on the phone with a client, remote staff must confirm the best way to get in touch with the client if necessary for management to follow up to discuss options. Staff must email their management team with the client's name, APID, catchment area, and a summary of the issue including the current balance, next issuance date and best contact method.

**Important:** Do not conclude a call with a client that needs an EBT card without confirming that a mailed card request is completed, and/or informing the client that the case has been escalated to a manager.

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**In-Office Staff  
Responsibilities**

When a client in a TAO is requesting an EBT card, after assessing the totality of their circumstances as outlined in the sections above and concluding a case does not need to be escalated to a manager, staff must assist the client in completing one of the self-service options for requesting an EBT card. This includes utilizing a kiosk, or if a client prefers, through the IVR option. Staff must ensure that the mailing address and phone number on file are accurate, identity verification is not outstanding, and confirm in BEACON that the request was successfully processed and pending central print. Staff are to coach clients who are interested in how to track an expected delivery date via DTA Connect and make a future replacement card request.

If the client identifies an immediate access need, the case must be escalated to the TAO management team.

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**Manager  
Responsibilities**

When a TAO manager receives an escalated EBT card request, they will continue to review the totality of the client's circumstances to determine which alternatives, if any, are appropriate. Cases identified by remote staff, that are outside of their catchment area, must be forwarded to the TAO management team for the client's catchment area.

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**Revised Online  
Guide Pages**

<b>Topic:</b>	COVID-19
<b>Book:</b>	TAO Reopening
<b>Page:</b>	EBT

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**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.

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