



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

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Online Guide Transmittal 2024-40
August 1, 2024

To: Department of Transitional Assistance Staff

From:  Sarah Stuart, Associate Commissioner for Local Implementation and Special Populations

Re: **SNAP: Clarification on the Permission to Share Information (PSI) Form**

Overview

The Permission to Share Information form gives contracted providers electronic access to the Provider Portal on www.DTAConnect.com or the Partner Activity Tracking Hub (PATH) system. This will give the provider the ability to access and share clients' information. This role authorizes an entire organization, not an individual.

Case managers do not have the capability to enter PSI records in the Assisting Persons page. This record is automatically batched into BEACON via the Provider Portal once the client completes the PSI registration process with the contracted SNAP provider.

Once the PSI record is completed by the client with their contracted SNAP or TAFDC Pathways to Work provider, the information will automatically be batched into BEACON via the Provider Portal on the Assisting Person page. The role field will display PSI – Outreach/PSI – SNAP Path to Work and show the Agency Name and Actual End date of the PSI. This arrangement is also confirmed by a Permission to Share Information Notification in the Client Communication tab. This is sufficient for the organization to speak with the Department on the client's behalf.

**Overview
(Continued)**

A PSI form will not be uploaded to the client's Electronic Case Folder (ECF), as SNAP Outreach providers are required to maintain the paper copy. However, there are times when staff may encounter a PSI form in the client's ECF. This happens when Providers choose to submit the form through the Document Processing Center. This is not required, but some Providers voluntarily do so.

If a case manager receives a completed PSI form to process, but there is no corresponding PSI record in the Assisting Persons page, then the case manager must print out a PSI cover sheet and scan the form to the Document Processing Center. The form will go to a central mailbox and processed by workers in the SNAP Outreach Department or SNAP Path to Work Department. This is necessary for the PSI to populate in the Assisting Person page.

Important: When a newly entered PSI item is completed, it may not show in the Assisting Person page automatically. This is a known issue, and staff must review the updated guidance to identify these cases and save the PSI information permanently in BEACON.

Purpose

This Online Guide update advises staff that a PSI form is not typically in the client's ECF, as the paper form is required to be retained by the Outreach/SNAP Path to Work provider. The PSI record on the Assisting Person page is sufficient for the organization to speak with the Department on the client's behalf.

**Revised Online
Guide Pages**

Topic: Cross Programs
Book: Assisting Person
Page: Permission to Share Info - SNAP Path to Work (SNAP)

Topic: Cross Programs
Book: Assisting Person
Page: Permission to Share Info - Outreach (SNAP)

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.
