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**Online Guide Transmittal 2025-3**  
**January 16, 2025**

**To: Department of Transitional Assistance Staff**  
**From: Sarah Stuart, Associate Commissioner for Local Implementation and Special Populations**  
**Re: Cross Programs: UMass Summer EBT Hotline Contract Expiration**

**Overview**

Summer EBT was established as a permanent, nationwide program by the Consolidated Appropriations Act of 2023. Massachusetts implemented Summer EBT in 2024. A Summer EBT Hotline was created to assist clients with questions regarding their Summer EBT benefits, as required by the United States Department of Agriculture (USDA) Food Nutrition Services (FNS). To ease the burden on the DTA Assistance Line and in local offices, the Department established a contract with UMass to manage incoming calls to the Summer EBT Hotline. This contract expired on December 31, 2024.

Effective January 1, 2025, the Department will manage the Summer EBT Hotline. Clients who call the Summer EBT Hotline after January 1, 2025 will hear a recording that will address many common questions about Summer EBT benefits. If the client still chooses to speak to a worker, the call will be routed to the DTA Assistance Line.

**Purpose**

The purpose of this Online Guide update is to advise staff of the:

- expiration of the Summer EBT Hotline contract with UMass on December 31, 2024; and
  - requirement to assist clients that call the DTA Assistance Line with inquiries regarding Summer EBT.
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**Client Inquiries**

Beginning January 1, 2025, it is important that staff who receive calls about Summer EBT no longer direct these clients to the Summer EBT Hotline. Staff must do their due diligence to assist the client while they have them on the phone or while working with them in person. Staff must review the guidance outlined in the Summer EBT book in the Online Guide to re-familiarize themselves with Summer EBT policy and procedures.

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**Revised Online Guide Pages**

**Book:** Summer EBT  
**Page:** Summer EBT Benefit Issuance

**Book:** Summer EBT  
**Page:** Summer EBT Communications and Support

**Book:** Summer EBT  
**Page:** Summer EBT Functionality in BEACON

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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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# Summer EBT Benefit Issuance

## INDEX

- [Summer EBT Benefit Issuance Methods](#)
- [Summer EBT Benefit Issuance Schedule](#)
- [Summer EBT Benefits Issuance Type](#)
- [Summer EBT Benefit Balance](#)
- [Summer EBT Card Replacement and PIN](#)

### Summer EBT Benefit Issuance Methods ([Back to Index](#))

Summer EBT benefits are issued based on the following guidelines:

- Children that are receiving a DTA benefit, at the time their Summer EBT is approved, will receive Summer EBT benefits on the grantee’s EBT card.
- Non-DTA clients (those that are eligible based on streamlined certification and those that apply for Summer EBT) will receive Summer EBT benefits for **all children** within the household on **one** Summer EBT card.
- Clients that are eligible because they were receiving DTA benefits during School Year (SY) 23-24, but are not currently active, are considered Non-DTA clients, and will receive their Summer EBT benefits for **all children** within the household on **one** Summer EBT card.

<b>Important</b>	Summer EBT cards will be issued to the parent/guardian on file for the corresponding child(ren). However, parent/guardian information is not obtained for children that meet eligibility based on being in foster care. For these children, the Summer EBT card will be issued to each individual foster child in the child’s name.
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### Summer EBT Benefit Issuance Schedule ([Back to Index](#))

Summer EBT benefits will be issued based on the following information:

- If approval is received prior to 7/10/2024, benefits will be paid on 7/25/2024
- If approval is between 7/11/24 – 8/6/24, benefits will be paid on 8/25/2024
- If approval is between 8/7/24 – 9/9/24, benefits will be paid on 9/25/2024
- If a client is approved after the summer period of 9/7/24, either through providing verification after 9/9/24, or a Summer EBT appeal is found to be in the client’s favor benefits will be paid on 25th day of the month of the file transfer sent to Conduent.

## Summer EBT Benefit Issuance Type ([Back to Index](#))

Summer EBT payments will be classified under a separate supplemental issuance type to facilitate easy tracking and reporting.

BEACON will add batch narratives for each Summer EBT issuance for DTA and Non-DTA households.

## Summer EBT Benefit Balance ([Back to Index](#))

Summer EBT clients, whose benefits are paid on their DTA EBT card or a Summer EBT card, can view their account balance in real time on [DTAConnect.com](http://DTAConnect.com) and the DTA Connect mobile app. When a household enters their card number, they will see their Summer EBT balance. Information on DTA Connect is available in six languages (i.e. English, Spanish, Chinese, Vietnamese, Portuguese, and Haitian Creole); this includes the Balance Information field. Households can also continue to access their balance information by calling the number on the back of their Summer EBT card.

## Summer EBT Card Replacement and PIN ([Back to Index](#))

Clients can request replacement Summer EBT cards by logging into their DTA Connect account. If a client calls into the DTA Assistance line to request a replacement card, you can complete the request in BEACON. For guidance on how to access Summer EBT details and how to complete Summer EBT replacement card requests see [Summer EBT Functionality in BEACON](#).

To PIN a Summer EBT, Non-DTA households must:

- call the number on the back of their Summer EBT card;
- enter the Summer EBT card number;
- enter the last 4 digits of their Case Number; and
- enter the date of birth of the person listed on the Summer EBT card.

<b>Important</b>	The name of the person listed on the Summer EBT card will be the name of the parent/guardian. However, in the instance that the child is streamlined certified as a foster child, the foster child's name will be the name on the Summer EBT card.
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**Last Update: January 16, 2025**

## Summer EBT Communications and Support

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### Notices ([Back to Index](#))

For Summer EBT recipients and applicants, DTA will issue a Summer EBT Welcome Notice and either a Summer EBT Approval and/or Summer EBT Denial Notice.

<b>Note</b>	Households that apply for multiple children could potentially receive both an approval and denial notice.  For example: A family applies for Summer EBT for 4 children and reports that they are within the income limit for their household size. The oldest child attends a private high school that does not participate in the National School Lunch or School Breakfast Programs, but the younger three children attend a public middle school that does participate in the National School Lunch Program. Based on this information, the oldest child would be ineligible for Summer EBT, but the younger three children would be eligible.
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### Summer EBT Welcome Notice ([Back to Index](#))

#### Streamlined Certification

DTA and Non-DTA clients that are automatically eligible for Summer EBT benefits via streamlined certification will receive a Summer EBT Welcome Notice. This notice:

- provides an introduction to the Summer EBT program and advises the client that no action is required on their part
- lists the children that have been approved for Summer EBT
- details the eligibility criteria for Summer EBT
- states that each child qualifies for \$120
- identifies when their benefits will be paid
- indicates if their benefits will be paid to an EBT card or a Summer EBT card; and
- notifies clients that they can also participate in the [Summer Eats Program](#).

## Summer EBT Applicants

Non-DTA clients that apply for Summer EBT benefits will receive a Summer EBT Welcome Notice. This notice:

- informs the client that their application for Summer EBT benefits has been received
- provides an introduction to the Summer EBT program
- lists the children included on the Summer EBT application;
- explains that DTA will take 3-4 weeks to verify school enrollment;
- explains that their benefits will be paid to a Summer EBT card; and
- notifies clients that they can also participate in the [Summer Eats Program](#).

<b>Note</b>	Non-DTA clients (those that apply for Summer EBT and those that are immediately eligible through streamlined certification) will have information on how to create a DTA Connect account on their Summer EBT Welcome Notice and their Summer EBT Approval Notice.  To assist the client, please refer to <a href="#">DTA Connect Overview</a> for steps on how to create an account.
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## Summer EBT Approval Notice ([Back to Index](#))

If Summer EBT is approved, the applicant will be sent a Summer EBT Approval Notice. This notice:

- provides an introduction to the Summer EBT program;
- lists the child(ren) approved for Summer EBT;
- states that each child qualifies for \$120 and lists the total benefit amount issued;
- details the eligibility criteria for Summer EBT;
- indicates if their benefits will be paid to an EBT or a Summer EBT card;
- provides information on how to PIN Summer EBT cards;
- informs the client that they have 122 days to access their benefits before they are expunged;
- advises the client how to Opt-Out of Summer EBT benefits;
- explains that children can only receive Summer EBT benefits from the state in which the child was last enrolled in school; and
- notifies clients that they can also participate in the [Summer Eats Program](#).

## Summer EBT Denial Notice ([Back to Index](#))

If an application for Summer EBT is denied, the applicant will be sent a Summer EBT Denial Notice for one of the following denial reasons:

- Already received 2024 Summer EBT benefits
- Household's countable income is over the limit for Summer EBT benefits
- Unable to Verify Enrollment in an NSLP/SBP school
- Does not meet the compulsory age for Summer EBT eligibility; or
- Incomplete Summer EBT application.

<b>Important</b>	If a child who meets the criteria for streamlined certification was not streamlined certified, meaning pertinent information was not sent to DTA, they will not receive a Summer EBT Denial Notice. However, parents/guardians may file an appeal and provide verification of school enrollment for the unverified child(ren).
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### Hearings and Appeals ([Back to Index](#))

If an applicant or client disagrees with a Department (DTA) action, they have the right to appeal. If a client requests an appeal, they will have a fair hearing. Appeals for Summer EBT will follow the same process as appeals for other DTA benefit programs, as outlined in [Right to a Fair Hearing](#).

### Text Messages and Email ([Back to Index](#))

Clients will also receive text messages and emails when:

- a Summer EBT application is received;
- a Summer EBT card has been issued (this includes replacement cards);
- Summer EBT benefits are denied;
- Summer EBT benefits are deposited to the account; and
- benefits are 45 days prior to expungement.

### Summer EBT Client Support & Resources ([Back to Index](#))

If a client calls in to the DTA Assistance Line to discuss their Summer EBT case, **you must** review Summer EBT information in BEACON for DTA and Non-DTA clients. You can view case details, update case information, view benefit history, request replacement Summer cards, and write a narrative. For additional guidance see [Summer EBT Functionality in BEACON](#).

If a client calls in to the DTA Assistance Line because they wish to **Opt-Out** of Summer EBT, you must direct the Non-DTA client to destroy their Summer EBT card.

If a client calls because they do not know their child's case number needed to PIN their Summer EBT card, or they need to request a new Summer EBT card, you can obtain their case details and complete replacement Summer EBT card requests in BEACON. For guidance on how to access Summer EBT details and how to complete Summer EBT replacement card requests see [Summer EBT Functionality in BEACON](#).

If a client calls in to inquire about the child's school participation in the National School Lunch Program and School Breakfast Program, a full list of participating schools is available at [Mass.gov/info-details/summer-ebt-list-of-nslpsbp-schools](https://www.mass.gov/info-details/summer-ebt-list-of-nslpsbp-schools).

**Last Update: January 16, 2025**



# Summer EBT Functionality in BEACON

## INDEX

<ul style="list-style-type: none"><li><a href="#">Overview</a></li><li><a href="#">Summer EBT Client Search</a></li><li><a href="#">Summer EBT Case Detail</a></li><li><a href="#">Summer EBT Case Detail History</a></li></ul>	<ul style="list-style-type: none"><li><a href="#">Summer EBT Case Narrative</a></li><li><a href="#">Summer EBT Benefit History</a></li><li><a href="#">Summer EBT Client Communication</a></li><li><a href="#">Summer EBT Card Request</a></li></ul>
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### Overview ([Back to Index](#))

Summer EBT was established as a permanent, nationwide program by the Consolidated Appropriations Act of 2023. Summer EBT is a program that provides money for food during the summer to certain families with school-aged children in Massachusetts.

Each year, the summer period is determined by the Department of Elementary and Secondary Education (DESE).

Summer EBT benefits are issued based on the following guidelines:

- Children that are receiving a DTA benefit, at the time their Summer EBT is approved, will receive Summer EBT benefits on the grantee’s EBT card.
- Non-DTA clients (those that are eligible based on streamlined certification and those that apply for Summer EBT) will receive Summer EBT benefits for **all children** within the household on **one** Summer EBT card.
- Clients that are eligible because they were receiving DTA benefits during SY 23-24, but are not currently active, are considered Non-DTA clients, and will receive their Summer EBT benefits for **all children** within the household on **one** Summer EBT card.

<b>Important</b>	Summer EBT cards will be issued to the parent/guardian on file for the corresponding child(ren). However, parent/guardian information is not obtained for children that meet eligibility based on being in foster care. For these children, the Summer EBT card will be issued to each individual foster child in the child’s name.
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Case managers can:

- search for Summer EBT clients
- view/edit Summer EBT client information
- view existing narratives and create new Summer EBT Narratives

- view Summer EBT Case Detail
- view Summer EBT Benefit History
- view Summer EBT Client Communications
- request a Summer EBT Replacement Card

## **Summer EBT Client Search** ([Back to Index](#))

The Summer EBT Client Search page, available under the My Office tab, is used to search for a recipient of Summer EBT Benefits (both DTA and Non-DTA households). The search is done against Summer EBT benefit recipient data only.

For a non-DTA client, the search may be performed by using one or more of the following elements:

- SASID
- Case Number
- Summer EBT/EBT Primary Account Number (PAN)
- Grantee or Head of Household's First, Last and Middle names
- Grantee or Head of Household's Birth Date
- Phone Number
- City

For active DTA cases, in addition to the search elements above, staff may also search by using the following elements:

- Grantee's APID or
- Grantee's SSN

To search a Summer EBT recipient in BEACON:

1. click Summer EBT on the My Office tab on the Home page
2. select Summer EBT Client Search
3. search by the Summer EBT recipient's information, i.e., the Grantee or Head of Household
4. the Summer EBT Client Search page allows staff to search by one or more identifying elements
5. enter known Summer EBT recipient information, and
6. click Search

If the name of the child receiving Summer EBT appears in the data field, the child is an existing Summer EBT recipient. The list of all children receiving Summer EBT benefits on the same case will appear in the data field.

<b>Note</b>	For Non-DTA clients, the Head of Household's information will not be listed in results, only the <u>eligible</u> children part of the household and can be accessed in the Case Detail page.
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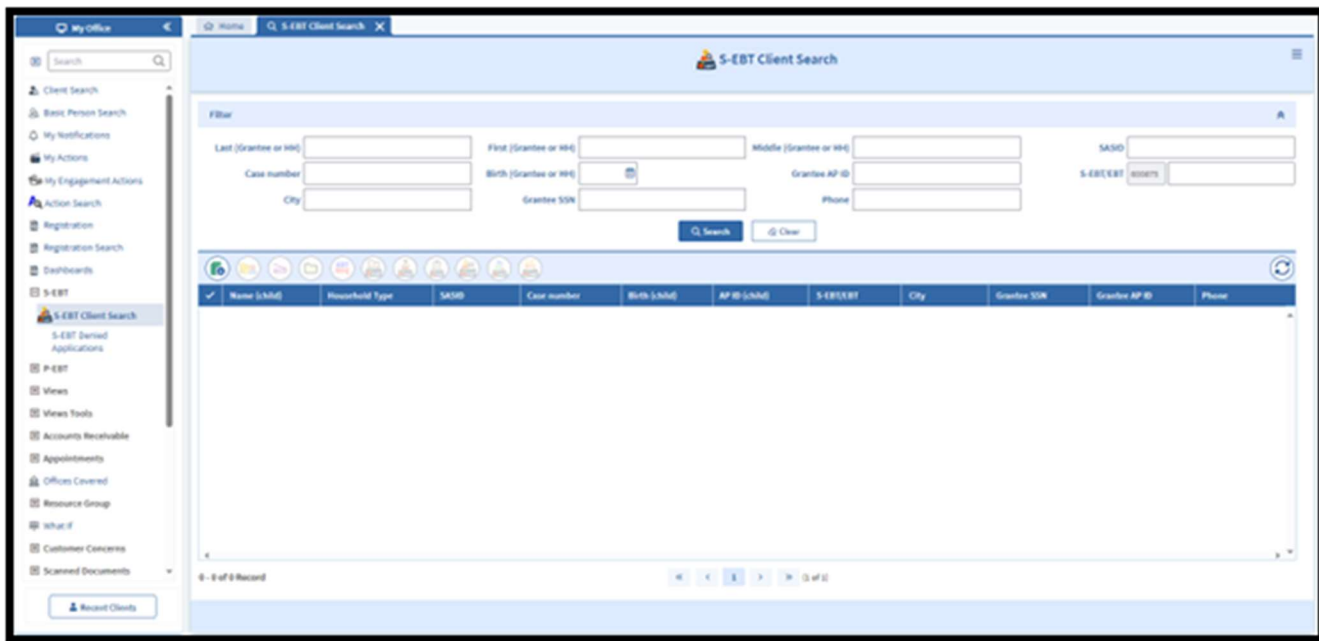
The Household Type field identifies if a Summer EBT recipient is also an active DTA household.

The Household Type field will display:

- **DTA** for DTA clients that are verified through streamlined certification; or
- **NON-DTA** for Non-DTA that are verified through streamlined certification AND Non-DTA clients that applied for Summer EBT.

To view the client's information in BEACON:

- select the Summer EBT client's name
- click the Summer EBT Case Detail icon (this will bring staff to the Summer EBT Case Detail page)



<b>Note</b>	By selecting the ECF icon for a DTA client, this will bring staff to the ECF of the grantee for that case.
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### Summer EBT Case Detail ([Back to Index](#))

The Summer EBT Case Detail page displays the Summer EBT recipient data. This page has 3 sections: Child, Grantee and Head of Household (HH) that will display data according to the current status.

The Child section displays:

- Household Type, i.e., DTA or NON-DTA
- school information, i.e., SASID, School ID, District code, and Free Reduced Indicator
- personal information, i.e., Child's Last, First, and Middle names, Birth Date, SSN, AP ID, Case Number, Residential Address and Mailing Address

If the client is a member of an active DTA case, the Grantee section will display the Grantee's Name, Grantee APID and Phone Number.

If the client is not part of an active DTA household, the Head of Household section will contain the parent/guardian's Name, Phone Number, Birth Date, and Receive Text Message fields. However, if the client was approved for Summer EBT through streamlined certification as a foster child, the child's name and number will appear under the Primary Contact section.

<b>Note</b>	For Non-DTA cases, staff are to make updates to the Address, Birth Date (for Child and Head of Household), Phone Number and Receive Text Message fields, as these can be edited. All other fields cannot be edited. Staff are unable to make changes in the Summer EBT Case Detail screen to Summer EBT cases actively receiving DTA benefits. Staff must make changes for these households in the regular BEACON Case Maintenance workflow.
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If changes are made to the Birth Date or Address of Non-DTA recipients, this information will also be updated in EPPIC.

The screenshot displays the 'S-EBT Case Detail' form. It is organized into three main sections: Child, Grantee, and Head of Household. The Child section includes fields for Household Type (NON-DTA), SASID, School ID, District code, Free/Reduced Indicator, S-EBT/EBT account, Last, First, Middle, Births, SSN, AP ID, Case number, Residential Address, and Mailing Address. The Grantee section includes Name, AP ID, and Phone. The Head of Household section includes Last, First, Births, Phone, and a 'Receive text message' toggle (set to 'Yes'). At the bottom, there are 'Save' and 'Clear' buttons, and three tabs: 'S-EBT Case Narrative...', 'S-EBT Case Detail History...', and 'S-EBT Benefit History...'.

There are three selectable tabs at the bottom of the Summer EBT Case Detail screen: Summer EBT Case Narrative, Summer EBT Case Detail History and Summer EBT Benefit History.

### **Summer EBT Case Detail History** ([Back to Index](#))

The Summer EBT Case Detail History page displays a history of all data changes made to the fields displayed in the list.

### **Summer EBT Case Narrative** ([Back to Index](#))

A Narrative must be written any time staff make changes to a client's Summer EBT case or assists with a client inquiry.

Steps for writing a narrative from the Summer EBT Case Narrative page:

1. In the Summer EBT Case Detail page, click on the Summer EBT Case Narrative tab
2. Click New to open the Notepad popup page
3. Write a detailed Narrative to record any changes made or how you assisted the client
4. Click the Save icon located in the lower left-hand corner of the page (The Notepad popup page will close, and the Narrative will be saved to the Summer EBT Case Narrative page)

<b>Important</b>	<p>A narrative <b>must be entered in the client's Summer EBT Case Narrative</b> when staff make any changes involving Summer EBT benefits.</p> <p>For DTA clients, all narratives entered on the Summer EBT Case Narrative page will also be available in the client's Case Narrative in their ECF. This includes Batch entered and user entered narratives. UMass staff will only have access to the Summer EBT Case Narratives, so it is vital that DTA staff enter Summer EBT narratives on the Summer EBT Case Narrative page.</p>
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### **Summer EBT Benefit History** ([Back to Index](#))

The Summer EBT Benefit History page displays all the benefits issued for the Summer EBT child. This page also has the following fields: Summer EBT Case Number, Benefit Month, Amount, Summer EBT or EBT Primary Account Number (PAN), Benefit Issuance date, date the benefit action was created, and the Household Type. Benefits are issued to a Summer EBT recipient based on the Household Type.

- If the Household Type is NON-DTA, Summer EBT benefits are issued to an account number that starts with "80" and can be accessed using their Summer EBT card.
- If the Household Type is DTA, Summer EBT benefits are issued to the Grantee's account and can be accessed using their EBT card.

Case Number	Benefit Month	Amount	Issuance	Created	Source
[REDACTED]	07/01/2024	120.0	07/25/2024	06/12/2024	NON-DTA
[REDACTED]	07/01/2024	120.0	07/25/2024	06/12/2024	NON-DTA

### Summer EBT Client Communication ([Back to Index](#))

The Summer EBT Client Communication tab in BEACON:

1. is used to track all out-going Summer EBT client communications in a single location.
2. allows users to search for and view all out-going Summer EBT communications to **Non-DTA households only** (MDM and DTA Connect). The Client Communication tab on the Summer EBT Client Search page allows users to view all out-going Summer EBT communications to **DTA households only**.
3. is a standalone page that can be launched from the Summer EBT Client Search page.

<b>Important</b>	When selecting the Summer EBT Client Communications tab or the standard Client Communications tab from the Summer EBT Client Search Page, the client communication search will default to the Grantee (for DTA households) or Head of Household (for Non-DTA households).
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The screenshot shows the S-EBT Client Search interface. The top section is titled "S-EBT Client Search". Below this is a "Filter" section with various input fields: Last (Grantee or HQ), First (Grantee or HQ), Middle (Grantee or HQ), SASID, Case number, Birth (Grantee or HQ), Grantee AP ID, S-EBT/EBT ASSETS, City, Grantee SSN, and Phone. There are "Search" and "Clear" buttons below the filters. A navigation bar contains several icons, with the "Summer EBT Client Communication" icon circled in red. Below the navigation bar is a table with columns: Name (click), Household Type, SASID, Case number, Birth (click), AP ID (click), S-EBT/EBT, City, Grantee SSN, Grantee AP ID, and Phone. The table contains one row of data. At the bottom, it shows "1 - 1 of 1 Record" and pagination controls.

1. from the Summer EBT Client Search page select the eligible student for whom you would like to initiate a communication history search.
2. click the Summer EBT Client Communication icon from the Summer EBT Client Search page which will cause the Summer EBT Client Communication tab to be displayed on top of BEACON.
3. there are several filters that can be used to target a search for a specific type of communication(s):
  - a. The Client field will be defaulted to the client searched from the launch page (e.g. Summer EBT Client Search).
  - b. The Worker field will be defaulted to blank so that it is not prefiltered.
  - c. The From date field defaults to 60 days before the current date. This restricts search results to communications that were created on or after the From date. Staff can change to any date that is not in the future to review communications beyond 60 days.
  - d. The To date field defaults to the current system date, restricting search results to communications that were created on or before the To date. Staff can change to any date that is not in the future.
  - e. The Communication field will default to blank so that no filtering will take place, and all client communications will populate for the selected client within the To/From period. Staff can select a communication type and the communications returned by the search will be for the selected type. The communication types are DTA Connect Alert, Email, DTA Assistance Line, Notice, and Text.
  - f. The Document field will default to blank so that no filtering will take place. The user can select a document type and the notices returned by the search will only be for the selected type.

- click the Search button to search for Documents and/or Communications that fit the search criteria.
- once you select a document or communication type to review, the item will be presented in a popup detail page.

<b>Note</b>	If a client requests a previously issued Notice to be mailed to them, staff may select the desired notice and select Central Re-print.
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## Summer EBT Card Request ([Back to Index](#))

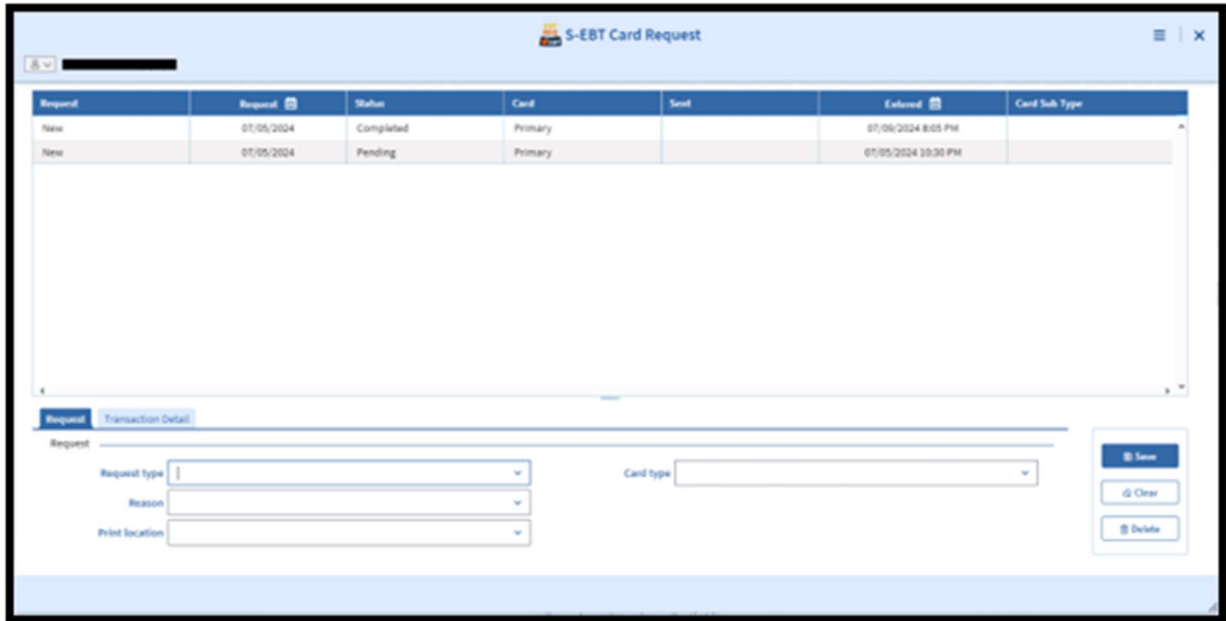
The Summer EBT Card Request is only for households who receive Summer EBT benefits on Summer EBT cards and are now requesting a replacement card. If a client calls or comes into DTA to request a replacement Summer EBT card, you must assist the client by completing the request in BEACON.

✓	Name (Child)	Household Type	SASSI	Case number	Birth (Child)	AP ID (Child)	S-EBT/EBT	City	Grantor SSN	Grantor AP ID	Phone
<input checked="" type="checkbox"/>	[REDACTED]	NON-DTA	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	QUINCY	[REDACTED]	[REDACTED]	[REDACTED]
<input type="checkbox"/>	[REDACTED]	NON-DTA	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	QUINCY	[REDACTED]	[REDACTED]	[REDACTED]
<input type="checkbox"/>	[REDACTED]	NON-DTA	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	QUINCY	[REDACTED]	[REDACTED]	[REDACTED]
<input type="checkbox"/>	[REDACTED]	NON-DTA	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	[REDACTED]	QUINCY	[REDACTED]	[REDACTED]	[REDACTED]

To complete a Summer EBT card request, you must:

- select the client for whom you would like to initiate a Summer EBT card request from the Summer EBT Client Search page;
- click the Summer EBT Card Request icon from the Summer EBT Client Search page which will cause the Summer EBT Card Request page to open as a pop-up page;





3. select the Request type of Replacement;
4. select the Card type of Primary;
5. select the Reason: Lost, Lost in Mail, Damaged, Defective, Stolen, Name Change, Damaged through Mail;
6. select the Print location of Central; and
7. click the Save icon.

<b>Note</b>	When a non-DTA client's request for a replacement Summer EBT card is approved, a Batch narrative will be entered in the client's Summer EBT Case Narrative. A subsequent Batch Summer EBT narrative will be entered when the card is mailed.
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**Last Update: January 16, 2025**