

Assisting Person

An assisting person is a person or agency who a client has approved to help them with DTA business. This could be a family member who helps them gather and return verifications we request or a friend who does their grocery shopping. It could also be a community partner that a client is working with to apply for benefits. The client needs to identify what type of access they want to give an individual or agency and/or who DTA can discuss their case with. See the Online Guide for detailed instructions: Cross Programs -> Request for Assistance (RFA)-> Assisting Person (RFA)

What	Level of Access	Document needed	BEACON
Release of Information	Gives DTA permission to discuss their case information with the identified agency or individual.	A signed, dated statement from the client. There is no specific form required but the VARI-OI form is an available.	Release must be properly scanned and identified in the case record so that it can be easily found. <div style="border: 1px solid black; padding: 2px; display: inline-block;">MLRI note: Release can be handwritten and submitted through DTA Connect. See Masslegalservices.org/DTA_release for sample.</div>
Authorized Rep - Application	Can sign SNAP applications, recertification/IRs and any other DTA forms on behalf of the client. The person/agency is authorized to report changes and speak to DTA about the case.	Image-10 (individual) Image-10A (agency)	Must be selected from drop down list under Role on the Assisting Person page as: <i>Authorized Rep- Application (SNAP)</i> for an individual <i>Authorized Rep/Agency – Application</i> for an agency Authorization must be properly scanned and identified in the case record so that it can be easily found.
Assisting With Application	Can help the client fill out an application. Does not have permission to discuss the case with DTA. May be contacted for purposes of trying to reach the client only.	This is identified on the SNAP application.	Must be selected from drop down list under Role on the Assisting Person page as: <i>Assisting with Application</i>
Authorized Rep - EBT	This person/agency is designated by a client to transact SNAP benefits. An EBT card is issued in the name of the individual or agency.	Image-10 (individual) Image-10A (agency)	Must be selected from drop down list under Role on the Assisting Person page as: <i>Authorized Rep- EBT (SNAP)</i> for an individual <i>Authorized Rep/Agency – EBT (SNAP)</i> for an agency Authorization must be properly scanned and identified in the case record so that it can be easily found.
Authorized Payee – EBT	A person designated by a client to transact cash benefits. An EBT card is issued in the name of the Authorized Payee.	Image-10	Must be selected from drop down list under Role on the Assisting Person page as: <i>Authorized Payee- EBT (CASH)</i> Authorization must be properly scanned and identified in the case record so that it can be easily found.

MLRI note: DTA job aid, issued to workers spring 2017.