



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

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**Online Guide Transmittal 2022-50  
July 7, 2022**

**To:** Department of Transitional Assistance Staff

**From:**  Sarah Stuart, Associate Commissioner for Change Management

**Re:** **SNAP: DTA Connect Provider Portal Updates and Permission to Share Information (PSI) Reminder**

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**Overview**

On Friday April 29, 2022, the Department released enhancements to the DTA Connect Provider Portal which include general updates; improvements to the “Search All Clients” and “My Clients” tabs, as well as the Permission to Share Information (PSI) functionality. DTA’s SNAP Outreach unit has advised partners of these enhancements.

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**Purpose**

This Online Guide Transmittal advises staff of the DTA Connect Provider Portal enhancements that were released on April 29, 2022. Additionally, a reminder on Permission to Share Information (PSI) functionality is also included in this Transmittal.

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**General Updates**

Outreach and Community Partners now have the ability to complete and submit Recertifications, COVID-19 Recertifications, and Interim Reports through the DTA Connect Provider Portal.

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**“Search All Clients” Tab**

The DTA Connect Provider Portal “Search All Clients” tab/Home page has been updated to only display information entered by the user to protect client data and to prefill the Primary Account Number (PAN) when “EBT Card Number” is used as the search criteria.

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**“My Clients”  
Tab**

Improved navigation to the DTA Connect Provider Portal “My Clients” tab includes:

- The addition of a “Sort” functionality,
  - Updates to the filter options, and
  - The ability to navigate pages from their list of clients.
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**Permission to  
Share  
Information  
(PSI)**

The DTA Connect Provider Portal allows access to contracted Outreach Partners. They can view and modify certain information for their respective clients who have signed a *Permission to Share Information* (PSI) form. This electronic form grants contracted partners access to view client case records. Once a PSI form is completed, the client will receive a notice advising them that the signed PSI form gives the Department permission to share information about their TAFDC, EAEDC and/or SNAP cases to the listed SNAP Outreach Partners and/or SNAP Path to Work Providers on the notice.

TAO staff do not have the capability to enter PSI records in the Assisting Persons page. This record is automatically batched into BEACON via the DTA Connect Provider Portal once the client completes the PSI registration process with the contracted SNAP Outreach Partner. Once batched in, the PSI information will appear on the Assisting Person page in BEACON. If staff receive contact from an organization that has completed a PSI form, the Department can release and receive client information from this organization based on what permissions are checked on the PSI form.

If in-person staff receive a completed PSI form, and there is no corresponding PSI record in the Assisting Persons page, staff must print out a Document Cover Sheet with the Document Type as Permission to Share Information and scan the form to the Document Processing Center. The form will go to a central mailbox and processed by staff in the SNAP Outreach Department or SNAP Path to Work Department.

If teleworking staff receive an action to process a scanned document and it is a completed PSI form, staff must send a secure email and attach the completed PSI form to the DTA Provider Outreach Unit at [DTA.SNAPOutreach@massmail.State.MA.US](mailto:DTA.SNAPOutreach@massmail.State.MA.US). For more information, please see [Permission to Share Info - Outreach \(SNAP\)](#).

The PSI functionalities on the DTA Connect Provider Portal have been updated to:

- Provide a Y/N indicator on the existence of PSI when users search for a client’s record from the “Search All Clients”/Home page tab,
  - Default to the correct PSI permissions depending on the user accessing the account, and,
  - Provide an option for users to complete a PSI at the end of an application without having to return to the Home page to initiate one.
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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 the DTA.Procedural Issues Mailbox.

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

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