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Department of Transitional Assistance

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Online Guide Transmittal 2025-20
May 2, 2025

To: Department of Transitional Assistance Staff

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

Re: Cross Program: SUN Bucks Enhancements on DTA Connect – Phase 1

Overview

This summer, the Department will issue **SUN Bucks** benefits to qualifying DTA and Non-DTA clients. SUN Bucks is the new name for Summer EBT. This program provides money for food during the summer to certain families with school-aged children in Massachusetts.

DTA Connect has been a highly efficient online application tool allowing clients to apply for and manage their benefits. As such, the Department has and will continue to make enhancements to the DTA Connect to improve functionality for both clients and staff.

To that end, the DTA Connect web portal and mobile app will now offer user-friendly access for SUN Bucks assistance. Clicking on the *SUN Bucks!* option on DTA Connect will take users to the SUN Bucks landing page. The SUN Bucks landing page can also be accessed directly via DTAConnect.com/SUNBucks. The landing page provides options for SUN Bucks clients to check on their case information.

This first phase of SUN Bucks Enhancements on DTA Connect will allow clients to Opt-Out of SUN Bucks benefits, obtain their SUN Bucks case number and offer an option for Non-DTA clients to update their mailing address for their SUN Bucks case record.

Overview (Continued)

Non-DTA clients who are automatically eligible for SUN Bucks (through streamlined certification) will receive a text or email directing them to provide their current address via the *Consent to update record* option on the SUN Bucks landing page. These text or email notifications will be sent to all Non-DTA households who are streamline certified and for whom we have a phone number and/or email address on file. This will ensure they receive information about their SUN Bucks benefits and their card in a timely manner.

A separate email and/or text message planned to be sent to DTA clients on May 16, 2025 informing them that we will send a SUN Bucks card to the mailing address we have on file, and if they need to update their address they need to log in to their DTA Connect account or contact their case manager to update their case information.

Clients who do not wish to receive SUN Bucks can opt-out of receiving benefits by selecting the Opt-Out of SUN Bucks option on the SUN Bucks landing page.

Purpose

The purpose of this Online Guide update is to advise staff of the new SUN Bucks Landing page, accessible via DTA Connect online and mobile.

New Online Guide Page

Book: Self-Service Options
Page: DTA Connect – SUN Bucks Landing Page

Revised Online Guide Page

Book: Self-Service Options
Page: DTA Connect Online

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.

DTA Connect – SUN Bucks Landing Page

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Overview (Back to Index)

The DTA Connect web portal and mobile offers user-friendly functionality for SUN Bucks assistance to staff and SUN Bucks clients. Clients can select their language of choice using the drop-down selection at the top of the page. DTA Connect is available in English, Spanish, Portuguese (Brazilian), Chinese (Simplified), Vietnamese, and Haitian Creole. Clicking on the *SUN Bucks!* option on DTA Connect will navigate users to the SUN Bucks landing page. The SUN Bucks landing page can also be accessed directly at DTAConnect.com/SUNBucks.

The SUN Bucks landing page offers options for clients to select:

- SUN Bucks Case Number Search
- Opt-Out of SUN Bucks
- Consent to Update Record
- Learn more about SUN Bucks
- Create Your Online Account

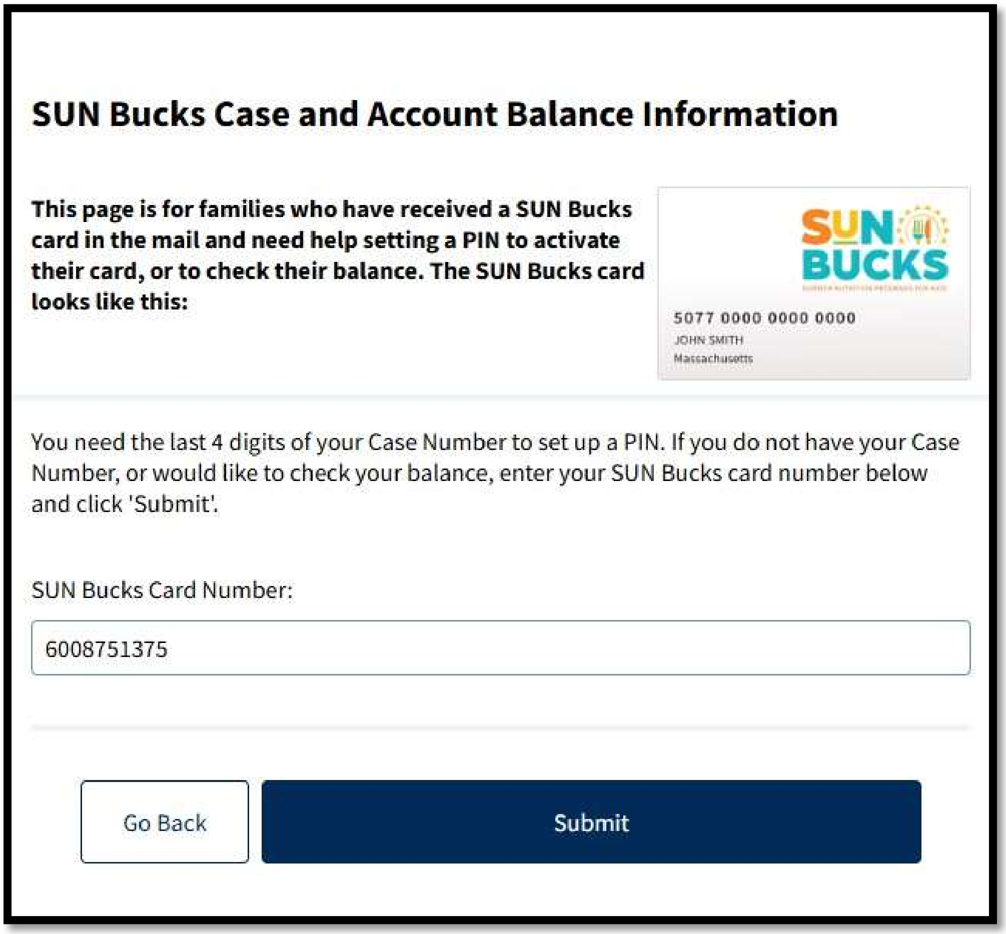
SUN Bucks clients may also view the SNAP eligibility tables from the landing page.

SUN Bucks Case Number Search (Back to Index)

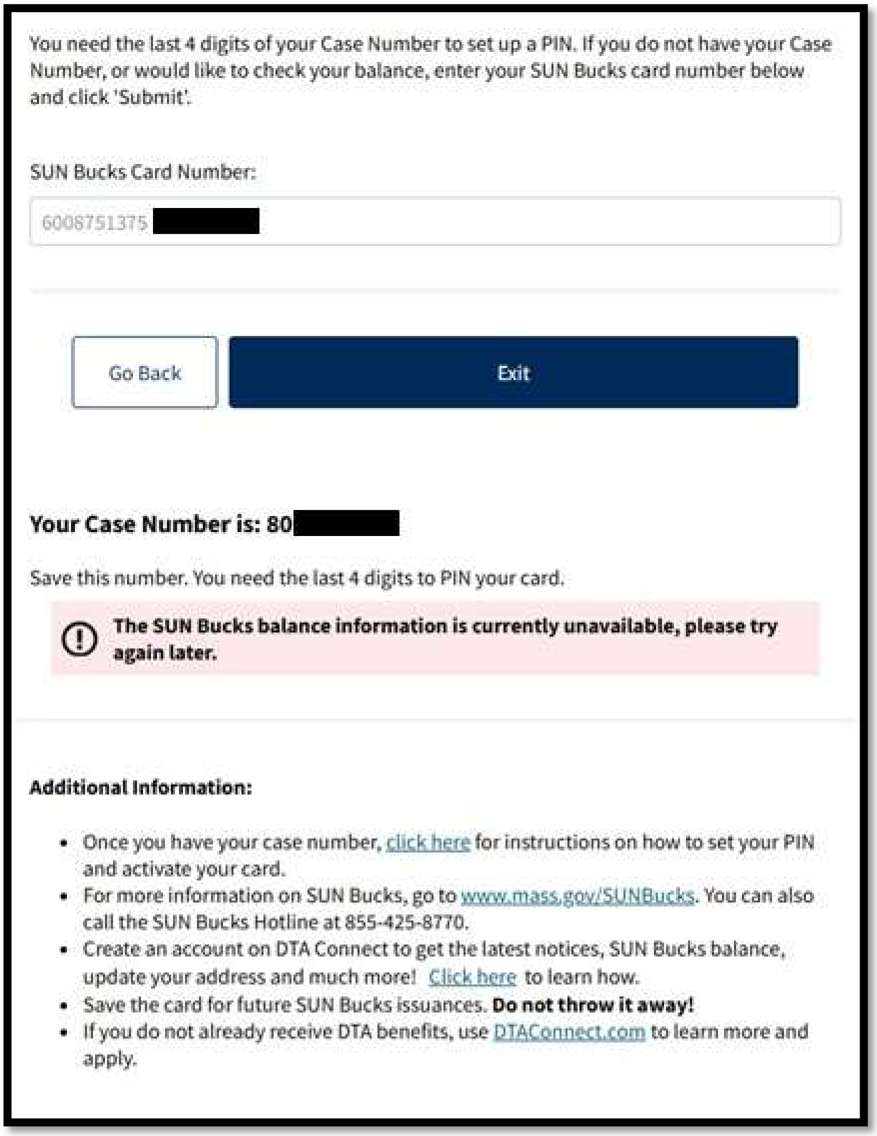
Clients can obtain their SUN Bucks Case Number and check their SUN Bucks balance by selecting the *SUN Bucks Case Number Search* option on the SUN Bucks landing page.

To search for the SUN Bucks Case Number and/or check the SUN Bucks balance, the client must:

1. click on the "SUN Bucks Case Number Search" button. This will navigate the client to the "SUN Bucks Case and Account Balance Information" page



2. enter the SUN Bucks Card Number (the first 10 digits of the SUN Bucks card will pre-populate); and
3. click “Submit”. This will generate the clients SUN Bucks case number and balance (if available).

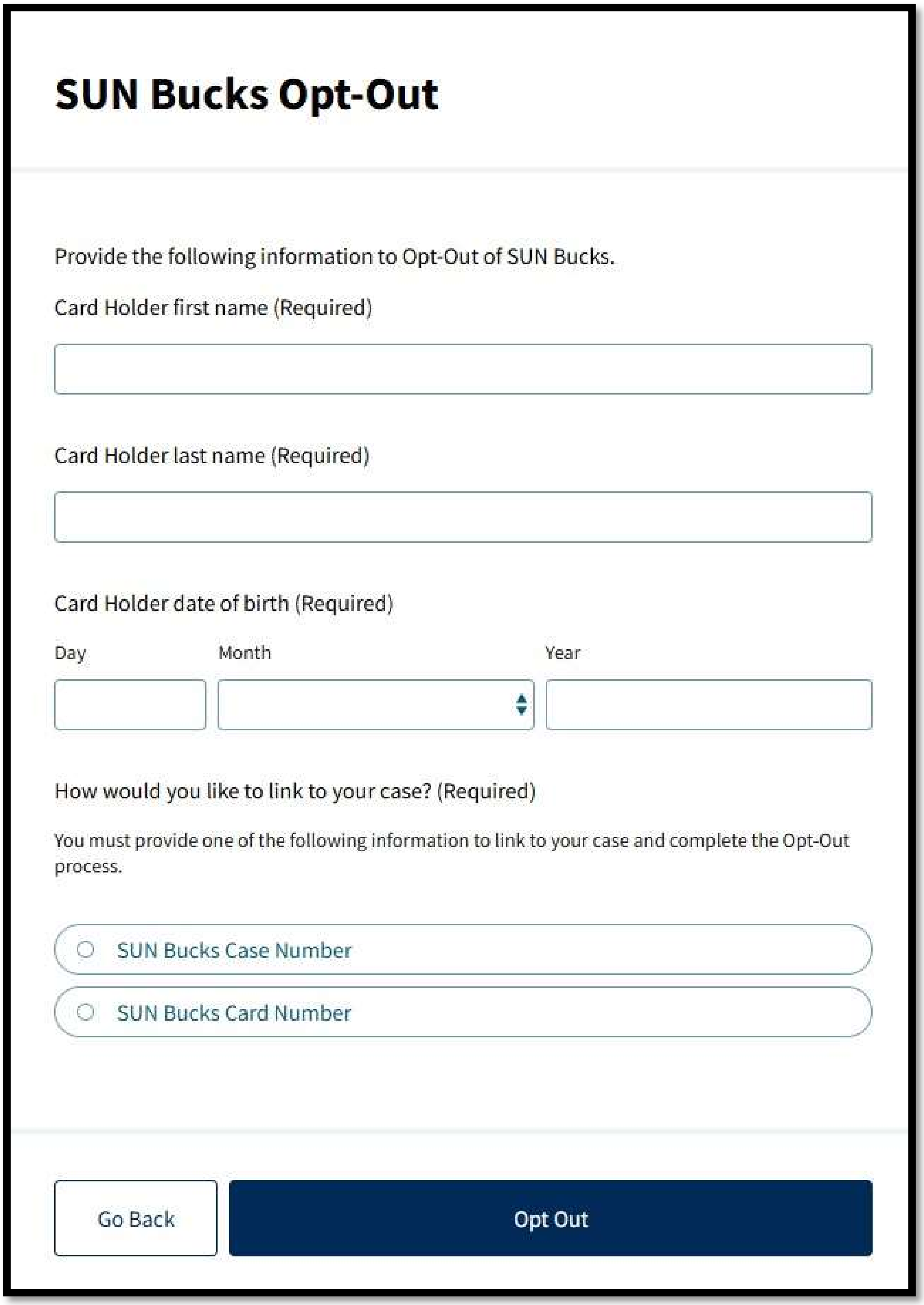


Opt-Out of SUN Bucks (Back to Index)

Clients who do not wish to receive SUN Bucks, can opt-out of receiving benefits by selecting the *Opt-Out of SUN Bucks* option on the SUN Bucks landing page. When a grantee or head of household chooses to opt-out of SUN Bucks, all children associated with that case number will not automatically get SUN Bucks in 2025.

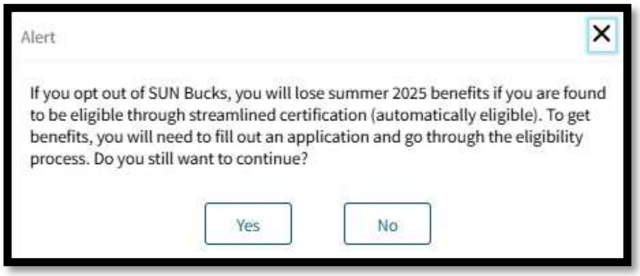
To Opt-Out from the Sun Bucks landing page the client must:

1. click on the “Opt-Out of Sun Bucks” button. This will navigate the client to the “SUN Bucks Opt-Out” page;



2. enter the Card Holder first name (Required)
3. enter the Card Holder last name (Required)
4. enter the Card Holder date of birth (Required)
5. select how they would like to link to their case (Required). The client must **select and enter** either their SUN Bucks Case Number or their SUN Bucks Card Number; and

6. select Opt-Out. The following pop-up message will generate:



7. select "Yes".

Note	If the client changes their mind and wants to get SUN Bucks for their child(ren), they will need to apply for SUN Bucks online at Mass.gov/SUNBucks.

When BEACON runs the Opt-Out request, the client will be sent a SUN Bucks Opt-Out Confirmation Notice, as well as email and/or text notification.

Consent to Update Record (Back to Index)

Non-DTA clients who are automatically eligible for SUN Bucks (through streamlined certification) will receive a text or email directing them to provide their current address via the *Consent to update record* option on the SUN Bucks landing page. These text or email notifications will be sent to all Non-DTA households who are streamline certified and we have a phone number and/or email address on file. This will ensure they receive information about their benefits and their SUN Bucks card in a timely manner.

Note	DTA clients are not to complete the *Consent to update record* from the SUN Bucks page to update their address. DTA clients must continue to log in to their DTA Connect account or contact their case manager to update their case information.

To update the mailing address from Sun Bucks landing page, the client must:

1. click on the "Consent to update record" button. This will navigate the client to the "Before you start" page
2. click "Yes" to proceed to the "Consent to update record" page

Consent to update record

Provide the following information to update your record.

How did you receive the DTA communication for SUN Bucks? (Required)

- ○ Phone
- ○ Email
- ○ Both

Card Holder first name (Required)

Card Holder last name (Required)

SUN Bucks Case Number

Your Case Number is the unique 9-digit number starting with '80' that is given to you by DTA to identify your case. It can be found on your DTA Notices.

80

Enter your Massachusetts address (Required)

If you have recently moved out of state, call the SUN Buck Hotline at 855-425-8770 to update your address.

Street Address

Zip

City

State

MA

Penalty Warning: By acknowledging this, I certify (promise) that all information I provided is true and correct. I understand that the state may verify (check) the accuracy of information in the information provided. I am aware that if I purposely give false information, I may be prosecuted under applicable state and federal criminal laws.

☐ I acknowledge and provide consent

Go Back

Submit

3. answer, “How did you receive the DTA communication for SUN Bucks? (Required) Select from the option: Phone, Email, or Both
4. enter the Card Holder first name (Required)
5. enter the Card Holder last name (Required)
6. enter the SUN Bucks Case Number
7. enter the Massachusetts address (Required). State auto-populates to MA. The user is prompted to enter the:
    a. Street Address
    b. Zip
    c. City
8. select “I acknowledge and provide consent”; and
9. select “Submit”.

Last Update: May 2, 2025

DTA Connect Online

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Overview (Back to Index)

DTA Connect Online is available as a website at DTAConnect.com. It was created to help clients who do not own smart devices or prefer to review and update case information using an internet browser on a computer. It also offers functionalities to contracted outreach providers who help their clients primarily by using a computer.

DTAConnect.com automatically reformats to the user's screen so it is accessible on computers, tablets, and other mobile devices.

The DTA Connect website includes user-friendly functionalities such as:

- a simplified SNAP screening tool;
- an interactive online SNAP application;
- an online TAFDC and EAEDC application
- workflows in which clients can update their contact information and self-declare certain expenses;
- a selection for DTA and Non-DTA clients, to assist with their SUN Bucks case;
- a client portal for clients who were pending, active, denied, or closed within the past 60 days; and
- a provider portal for contracted SNAP Outreach providers to access pertinent case information for clients in their respective caseload.

Further, clients can select their language of choice using the drop-down selection at the top right side of DTAConnect.com and/or change their preferred language under the "My Info" page in their DTA Connect account (e.g., for text communications and written notices). DTA Connect is available in English, Spanish, Portuguese (Brazilian), Chinese (Simplified), Vietnamese, and Haitian Creole.

Screening Tool (Back to Index)

The DTA Connect Screening Tool is an optional service for potential SNAP applicants to determine possible SNAP eligibility.

The tool asks 4 questions:

- How many people are in your household (including you)?
- Is anyone age 60 or older?
- Does anyone have a disability?
- What is the total gross income for your household (weekly, monthly, annually)?

The screener will apply gross income standards based on the household size unless there is someone age 60 or older or has a disability because there is no gross income limit for these households. If a potential applicant does not appear to be eligible due to income, they are advised that Project Bread may do a more thorough screening. Personal information is not collected by the screening tool.

Regardless of screener results, potential applicants are advised of their right to apply for SNAP benefits.

Online Application for SNAP, TAFDC, and EAEDC Benefits (Back to Index)

DTAConnect.com offers an online SNAP, TAFDC, and EAEDC Application. Account creation is not required but is encouraged upon submission of an application so that clients may keep track of their case status and utilize all functionalities. The application is signed electronically. All pertinent data required for a SNAP application is collected. The SNAP application is intuitive and interactive. Helpful tips and navigation are provided throughout the process. Situational questions are asked based on previous responses provided.

For example, if the SNAP applicant indicates that they are a household of one, questions about income and expenses for other members will not be asked.

For all programs, questions asked of the applicant will display on the application data sheet upon submission. The Application Datasheet is available in the Electronic Case Folder (ECF) in the Client Communications tab.

Staff must utilize the data sheet to transfer information onto BEACON. Some content from the online application will automatically transfer into the ECF if all required BEACON fields have been completed to save the entry. Staff must review datasheets in their entirety to make sure all information is available in BEACON.

Important	Additional verification of self-declarable expenses is not required unless the information is questionable or contradictory.

DTA Connect – Client Portal (Back to Index)

Clients who are the Head of Household must set up an account and link it to their case record to utilize all available functions of DTAConnect.com.

Setting up an account is easy. Clients must be the Head of Household, provide an email address, create a password, and provide their first and last name, and date of birth.

After that is complete, the account must be linked to the case record by using a SNAP Web Application Number, Agency ID, Social Security Number, or EBT Card number.

The DTA Connect client portal offers clients access to their case information through the internet. The website automatically formats to the device being used, so it is mobile friendly without needing to have the mobile app downloaded.

My Info Page (Back to Index)

Clients can use DTA Connect to update their primary language, address, phone number, e-mail address, shelter costs, utility costs, dependent care costs, and/or medical costs. Clients can also use DTA Connect to lock and unlock their EBT card.

For more information, see DTA Connect: My Info Page.

Submitting an Interim Report (Back to Index)

Clients who log in to DTAConnect.com and are within the 45-day window from the date the paper version of the form is mailed will see an alert to complete the process. This alert displays unless/until the client completes the process online or the workflow is initiated in BEACON.

Important	If a client is due to complete an Interim Report but the case closes, the interactive Interim Report process will not be available. You must advise the client that the fastest option is to print a copy of the form, manually complete it, and upload it using the DTAConnect.com account or mobile app. Clients may also go into a local office. **Clients should not complete a new SNAP application.**

When a client submits an Interim Report through DTAConnect.com:

- FAW staff will receive a Process Online Interim Report Action
- Economic Assistance case managers will see submissions in the Reevaluations Due View

All questions asked will display on the Interim Report Datasheet which is stored in the Client Communications tab. Most data elements will transfer into BEACON but staff must review the entire Datasheet.

If the client completes the optional Self-Declaration workflow after submitting the Interim Report, the Self-Declaration Datasheet will be available in Scanned Document History. Additional verification of self-declarable expenses is not required unless the information is questionable or contradictory.

Important	BEACON will submit the Interim Report in the Reevaluation workflow if the client: • does not have any changes to report or reported changes are below the threshold, • there are no outstanding Program Integrity concerns, and • there are no scanned documents pending review (including the Self-Declaration Datasheet) In that instance, staff must not review other pages or make external database requests. The case must be authorized with a Narrative stating: "Authorized Interim Report without changes." It is possible that changes may have been submitted by the client or received by the Department, by way of a match, after the creation of the processing action.

	In these instances, staff must take appropriate action (e.g., updates income / expenses, follow-up on a match, etc.) prior to completing the IR.

Submitting a Recertification (Back to Index)

Clients who log in to DTAConnect.com and are within the 45-day window from the date the paper version of the form is mailed will see an alert to complete the process. This alert displays unless/until the client completes the process online or the workflow is initiated in BEACON.

Important	If a client is due to complete a Recertification but the case closes, the interactive Recertification process will not be available. You must advise the client that the fastest option is to print a copy of the form, manually complete it, and upload it using the DTAConnect.com account or mobile app. Clients may also go into a local office. **Clients should not complete a new SNAP application.**

When a client submits a Recertification through DTAConnect.com:

- FAW staff will receive a Process Online Recertification Action
- Economic Assistance case managers will only see the SNAP submissions in the Reevaluations Due View. At this time, this functionality is not available for TAFDC and EAEDC Reevaluations.

All questions asked will display on the Recertification Datasheet which is stored in the Client Communications tab. Most data elements will transfer into BEACON but staff must review the entire Datasheet. Unlike Interim Reports, at Recertifications, staff must review all data that was in the case record. Clients are encouraged to submit all required verifications upon submission, but they are not asked to enter information about elements that require further verification, such as earned income.

If data was available in the case record and is not asked on the Recertification form, staff must follow up with the client during the interview (if required) or through a Verification Checklist (VC-1).

DTA Connect – Provider Portal (Back to Index)

The DTA Connect Provider Portal allows access to contracted outreach providers. They can view and modify certain information for their respective clients who have signed a *Permission to Share Information* form. This form grants providers access to client case records. Central Office staff is responsible for updating provider access when these forms are received. When you receive a call from someone who has completed a *Permission to Share Information* form, you must treat that as a Permission to Share – Outreach (SNAP) role.

If a client wants to revoke access, they may do so verbally or in writing. You must end the Permission to Share – Outreach (SNAP) record using the applicable reason, depending on the information provided by the client.

Last Update: May 2, 2025