

**GENERAL INFORMATION SYSTEM**  
**Center for Employment & Economic Supports**

January 21, 2015

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**TO:** Subscribers

**SUGGESTED DISTRIBUTION:** Commissioners; TA Directors; SNAP Directors

**FROM:** Phyllis D. Morris, Deputy Commissioner  
Center for Employment and Economic Supports

**SUBJECT:** SNAP Applications submitted through Intuit (Turbo Tax)

**EFFECTIVE DATE:** Immediately

**CONTACT PERSON:** SNAP Bureau, 518-473-1469

**Background**

Within the last two weeks, several local social services districts (SSDs) have reported to OTDA that they have received SNAP applications that appear to have been generated using Intuit's on-line tax preparation software, Turbo Tax. Several other states, along with New York State, also reported to the United States Department of Agriculture (USDA) that their local offices have been receiving applications generated through Turbo Tax.

We have learned that Intuit has built a functionality into their Turbo Tax software called "Benefit Assist". Benefit Assist is a screening and application tool which allows income tax filers using Turbo Tax to be screened for SNAP eligibility and eligibility for other assistance programs. Apparently, low-income households that file their taxes with Turbo Tax are provided with a prompt that says they may be eligible for SNAP, and to click if they would like to apply. If the client opts to apply for SNAP, the system, Benefit Assist, auto-populates a writeable PDF version of the State's most recent version of its paper SNAP application using the client's existing tax data. The client also is asked questions about additional household members, their income and resources. The client signs the application with a wet (not electronic) signature and TurboTax faxes it – usually along with an Authorized Representative form designating Turbo Tax as the Authorized Representative -- to the appropriate local SNAP office based on the client's zip code. If the client decides not to submit an application, the client may exit at any time. There is no cost to use Benefit Assist and it is completely optional. Benefit Assist is also available at no cost to clients that do not file their tax forms with TurboTax.

In New York State, Turbo Tax is automatically pre-populating data from the income tax return into the LDSS-4826 SNAP Application, and faxing it to the local SSD office along with the LDSS-4942, Designation of Authorized Representative, designating Turbo Tax as the authorized representative.

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USDA met with Intuit officials last week to discuss this matter. Intuit claimed that they had been in contact with “senior State agency” staff from 18 states and planned to meet with every state soon. To date, Intuit has not met with New York State. USDA discussed its concerns with Intuit, and, within the next week, Intuit will remove the option that allows the client to designate Intuit/Turbo Tax as an authorized representative. USDA also has identified several additional issues and is working to ensure that Intuit’s approach conforms to Federal statutory and regulatory requirements.

**Program Implications**

**Until further notice, LDSS-4826 SNAP applications received by local districts from Turbo Tax must be processed following the same procedures as any other application received.**

The application date is the date received by the local district. The application must be screened for expedited processing, and the household must be interviewed. As with any other SNAP application, the data that is pre-populated by Turbo Tax must be verified. In particular, income information from a household’s 2014 tax return may not be current. Current income, based on the last four weeks of income, must be verified.

**The LDSS-4942, Designation of Authorized Representative, populated with Turbo Tax as the authorized representative are not valid authorized representative forms.** Organizations and corporate entities may not be authorized representatives for SNAP. Only individuals can serve as authorized representatives for SNAP. **As with any document containing personal and confidential information about a SNAP applicant or recipient, these LDSS-4942 forms designating Turbo Tax as an applicants authorized representative should be disposed of securely and appropriately.**