Susana Martinez, Governor
Brent Earnest, Secretary Designate
Marilyn Martinez, Acting Director

General Information Memorandum

ISD-IPP 15-03

TO: ISD Employees

FROM: Marilyn Martinez, Acting Director, Income Support Division

RE: Intuit (Turbo Tax)

DATE: February 2, 2015

ISD recently became aware of the Intuit (Turbo Tax) initiative which allows individuals to screen themselves for SNAP eligibility and apply for SNAP and other federal benefits using Intuit's free software program Benefit Assist. The United States Department of Agriculture Food and Nutrition Services (FNS) has confirmed Intuit utilizes the most current version of the New Mexico Application for Assistance (HSD 100).

These applications should be processed using the normal processing standards. This includes accepting the application if they contain at a minimum name, address and signature. Applications that do not contain the minimum requirements are not required to be processed by ISD. The caseworker is to try and contact the applicant to inform them that their application could not be processed and offer alternate ways to complete the application.

Authorized Representative

FNS has confirmed staff are to disregard the authorized representative section of the applications that identify Intuit as the authorized representative. Intuit is in the process of updating the authorized representative section of the software to remove this option.

A brief summary of the Intuit application process is attached for reference.

If you have questions regarding this IPP, please contact Samuel Peinado via email at Samuel.Peinado@state.nm.us or by phone at 505-827-7219.

Intuit SNAP Application Process

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 most recent State's SNAP application using the client's existing tax data. The client is asked questions about additional household members, their income and resources. The client signs the application and TurboTax faxes it to the appropriate SNAP local 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 accessible to clients that do not file their tax forms with TurboTax at no cost.

https://benefitassist.intuit.com/#!/home