

01 EBPM - Purpose

EBPM is used to establish an Electronic Benefit Transfer (EBT) account in the EBT Processing System.

Once an EBT account is established, EBPM is used to set up or change EBT Alternate Card Holders, and to authorize [EBT QUEST card](#) use for the appropriate benefit type.

EBT Primary Payees and EBT Alternate Card Holders must be positively identified before [card issuance](#).

(See [EBT Payee Maintenance - Overview](#))

01 EBT Payee Maintenance - Overview

REVISION 01
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Policy and procedures regarding **EBPM** are outlined as follows:

- [Establishing the EBT Primary Payee](#)
- [Establishing or Changing an EBT Alternate Card Holder](#)
- [Authorizing the use of an EBT Account](#)

For complete policy and procedures regarding Electronic Benefit Transfer, including the screens in the **EBT** Processing System, see [EB- EBT Policy and Procedures](#).

01 Establishing the Primary Payee

When **EBPM** is accessed, either through the roadmap or from function 1 on the EBME **AZTECS** interfaces with the EBT Processing system. An **EBT** Primary Payee must be set up for the case. When an EBT Primary Payee has not been set up, AZTECS displays the following edit message:

CASE DOES NOT EXIST ON THE EBT SYSTEM - MUST ADD

For policy and procedures regarding setting up and adding EBT Primary Payee information on EBPM, see [EBT Primary Payee Set Up](#).

For policy and procedures regarding changing EBT Primary Payee information, see [EBT Primary Payee Changes](#).

H EBT Primary Payee Set up

To set up the **EBT** Primary Payee, press ENTER. One of the following occurs:

- When transmission is successful, the EBT Processing System displays the following edit message: *INFO* PRIMARY PAYEE CLIENT DATA ADDED ON THE EBT SYSTEM
- When transmission is unsuccessful, the EBT Processing system responds with an edit message indicating the reject reason. Correct the error, and press ENTER again to resubmit the request. When the transmission continues to be unsuccessful, continue working the case, and try later.

NOTE Benefits cannot be authorized until the EBT Primary Payee information is successfully added.

I EBT Primary Payee Changes

Once the **EBT** Primary Payee has been set up on **EBPM**, the only Primary Payee information that can be changed on EBPM is the [authorization to use](#) EBT CA Benefits. To change the authorization to use EBT CA benefits, complete the following:

- Key C in the ACTION field.
- Key N in the AUTHORIZED TO USE CASH field.

NOTE An N can only be keyed when an Alternate Card holder has been established to use the EBT CA.

- Press ENTER. When transmission is successful, the EBT Processing System displays the following edit message: *INFO* PRIMARY PAYEE CLIENT DATA MODIFIED ON THE EBT SYSTEM
When transmission is unsuccessful, the EBT Processing System responds with an edit message indicating the reject reason. Correct the error, and press ENTER again to resubmit the request to the EBT Processing System.

NOTE When no C is keyed in the ACTION field, and information is changed, the EBT Processing System displays the following edit message: *ERROR* YOU ARE CHANGING PAYEE INFO. USE CHANGE FUNCTION.

- When keying or changing the authorization to use EBT CA benefits, at least one program must be authorized. When the AUTHORIZED TO USE CASH field is changed to N, the EBT Processing System displays the following edit message: A CASE MUST HAVE AT LEAST ONE PERSON WITH THE CASH FIELD FLAG = TO "Y"

Identifying information on the EBT Primary Payee is changed in the EBT Processing System through interface with **AZTECS**, as follows:

- When name or date of birth changes are keyed on **SSDO** or **CLMA**.
- When a site code change is keyed on **CARC**, or a site code is keyed for a new application on **REAP**.

01 Establishing or Changing EBT Alternate Card Holder

When an **EBT** Alternate Card Holder is required, or to change EBT Alternate Card Holder information, for a case, key **A** in the SET UP OR CHANGE PRIMARY OR ALTERNATE field.

A participant may select up to two EBT Alternate Card Holders for a case. Explain the following to a participant requesting an EBT Alternate Card Holder during the interview:

- The EBT Alternate Card Holder is issued their own [EBT card](#).
- The EBT Alternate Card Holder selects or is mailed their own [EBT Personal Identification Number](#) (PIN).
- The EBT Alternate Card Holder has full access to the Primary Payee's EBT benefits they are authorized to use.
- Funds spent by the EBT Alternate Card Holder are treated as though the EBT Primary Payee spent the funds themselves and will not be replaced.

The EBT Primary Payee must provide written authorization to establish EBT Alternate Card Holders.

During the interview or when an EBT Alternate Card Holder is requested, complete the Designation of EBT Alternate Card Holder (FAA-1004A) form. The FAA-1004A identifies the person to act as the EBT Alternate Card Holder.

Give a copy of the FAA-1004A to the Primary Payee when the Alternate Card Holder will return to the FAA office for an over the counter issued EBT card. Place the original in the [case file\(g\)](#).

EXCEPTION

When the selected EBT Alternate Card Holder is a [CA EBT Alternate Card Holder](#), do not have the EBT Primary Payee complete the FAA-1004A.

In a combination CA and NA case, a CA EBT Alternate Card Holder can only access CA and an [NA Representative](#) can only access NA. Complete the following to block access to the applicable program benefits:

- Key N in the AUTHORIZED TO USE CASH field to block the NA Representative's access to CA.
- Key N in the AUTHORIZED TO USE FS field to block the CA EBT Alternate Card Holder's access to NA.

For policy and procedures regarding setting up and adding EBT Alternate Card Holder information on [EBPM](#), see [EBT Alternate Set Up](#).

For policy and procedures regarding changing EBT Alternate Card Holder information, see [EBT Alternate Changes](#).

For policy and procedures regarding deleting EBT Alternate Card Holders from a case, see [EBT Alternate Deletions](#).

H EBT Alternate Set Up

To set up the [EBT](#) Alternate Card Holder, complete the following:

- Key A in the PRIMARY OR ALTERNATE field, and press ENTER to display the ALTERNATE CARDHOLDER 1.
- Key A in the ACTION field.
- Key the EBT Alternate Card Holder information in the remaining fields.
- When a second EBT Alternate Card Holder is requested, key A in the SET UP CHANGE PRIMARY OR ALTERNATE field, and press ENTER to display the ALTERNATE CARDHOLDER. Complete as described for the ALTERNATE CARDHOLDER 1.
- Press ENTER. When transmission is successful, the EBT Processing System displays the following edit message:
INFO ALTERNATE 1 (2) CLIENT DATA ADDED ON THE EBT SYSTEM

When transmission is unsuccessful, the EBT Processing System responds with an edit message indicating the reject reason. Correct the error, and press ENTER again to resubmit the request to the EBT Processing System.

I EBT Alternate Changes

Once the EBT Alternate Card Holder has been set up on EBPM, to change the information, complete the following:

- The EBT Primary Payee must provide written authorization of the request to change the EBT Alternate Card Holder(s). Have the EBT Primary Payee complete the [FAA-1004A](#). Document the request in the [case file\(g\)](#).
- Key A in the SET UP OR CHANGE PRIMARY OR ALTERNATE field. Press ENTER to display the ALTERNATE CARDHOLDER 1.
- Key C in the ACTION field.
- Key the EBT Alternate Card Holder information.
- Press ENTER. When transmission is successful, the EBT Processing system displays the following edit message:
INFO ALTERNATE 1 (2) CLIENT DATA MODIFIED ON THE EBT SYSTEM

When transmission is unsuccessful, the EBT Processing System responds with an edit message indicating the reject reason. Correct the error, and press ENTER again to resubmit the request to the EBT Processing system.

NOTE When no C is keyed in the ACTION field, and information is changed, the EBT Processing System displays the following edit message: *ERROR* YOU ARE CHANGING PAYEE INFO. USE CHANGE FUNCTION.

J EBT Alternate Deletions

Only EBT Alternate Card Holders can be deleted on EBPM.

Once the EBT Alternate Card Holder has been set up on EBPM, to delete the information, complete the following:

- Key A in the SET UP OR CHANGE PRIMARY OR ALTERNATE field, and press ENTER.
- Key D in the ACTION field.
- Press ENTER. When transmission is successful, the EBT Processing System displays the following edit message:
INFO ALTERNATE 1 (2) CLIENT WAS DELETED

When transmission is unsuccessful, the EBT Processing system responds with an edit message indicating the reject reason. Correct the error. Press ENTER again to resubmit the request to the EBT Processing System.

NOTE When a QUEST card was issued to the EBT Alternate Card Holder, the card must be in a status other than ACTIVE before the EBT Alternate Card Holder can be deleted. (See [EB- EBCM](#)) When the card is not [statused](#), AZTECS displays the following edit message: *ERROR* CARD MUST BE STATUSED PRIOR TO DELETING ALT.1 (2).

01 **Authorizing Use of EBT Account**

EBPM is used to allow or restrict the use on an EBT account.

To authorize the EBT Primary Payee or EBT Alternate Card Holder access to the applicable benefit type(s), complete the following:

- Ensure Y is displayed in the AUTHORIZED TO USE CASH field.
- Press ENTER. AZTECS transmits the information through interface to the EBT Processing System.

For the EBT Primary Payee, one benefit type can be restricted on EBPM, but not both. For the EBT Alternate Card Holder, both CA AND NA benefits can be restricted.

To restrict the EBT Primary Payee or Alternate Card Holder access to the applicable benefit type(s), complete the following:

- Key N in the AUTHORIZED TO USE CASH or AUTHORIZED TO USE FS fields, as appropriate.
- Press ENTER. AZTECS transmits the information through interface to the EBT Processing System.

WARNING

Do not change the AUTHORIZED TO USE CASH or AUTHORIZED TO USE FS fields to N unless there is an ACTIVE corresponding program. Keying N when no active case exists restricts use of the EBT account for the active program.