



Telephonic Signature Assister Guidance

October 2025

MassHealth Assister Line: 844-811-3384 and press 1 for telephonic signature

This document supersedes any previous guidance communicated prior to September 2025 regarding telephonic signature capture for MassHealth Certified Assisters

Best Practices for Completing MassHealth Applications, Renewals, Supplements and Forms:

- Assisters should remind individuals of the multiple ways to apply for MassHealth remotely:
 - The fastest way to apply is online using a computer, tablet or mobile phone at www.mahealthconnector.org
 - A number of MassHealth applications and forms are also available to complete and submit via AdobeSign.
 - Individuals can also apply over the phone with MassHealth Customer Service at (800) 841-2900, TDD/TTY: 711
- Remind individuals if they have an Authorized Representative Designation (ARD) Form already on file, they may save time and resources by contacting their ARD and requesting their assistance, including signing of their behalf.

Assisters can assist individuals remotely, provided Certified Application Counselors (CACs) adhere to required privacy guidelines and guidelines for obtaining a signature.

Obtaining signatures when working with individuals remotely:

- If an Assister is working with an individual remotely, you must utilize the MassHealth Assister Line to telephonically capture and record the signature of the individual.
- Telephonic signature capture and recording can be completed for the following forms and applications:
 - Certified Application Counselor Designation Form (CDF)
 - Massachusetts Application for Health and Dental Coverage and Help Paying Costs (ACA-3)
 - Application for Health Coverage for Seniors and People Needing Long-Term-Care Services (SACA-2)

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- Medicare Savings Program Application (MBHI)
- Medicare Savings Program Renewal Application (MBHI-R)
- Authorized Representative Designation Form (ARD) (Optional for Assisters to complete.)
- Permission to Share Information Form (PSI) (Optional for Assisters to complete.)

Key points for capturing a signature while working with a member/applicant remotely:

- Contact the MassHealth Assister Line with the member/applicant on the line.
- Request consent to capture a signature for an application or form telephonically.
- MassHealth Customer Service will collect the information needed to complete the form, read the applicable consent language, and record the member providing consent.

Completing CAC Designation Form (CDF):

If the Assister has worked with this individual in the past and has already completed a CDF for this individual, the Assister can begin the signature capture process once the application or form is complete.

If the Assister is working with the member/applicant for the first time, you must complete the following steps before working with the individual:

- Consistent with current policy and practice, Assisters must first complete the CDF for every member you are working with.
- Assisters must read the CDF in its entirety and should offer to email or mail the form to the individual for their reference.
- In order to complete the CDF and capture the signature of an individual for consent – the Assister and the member/applicant must call MassHealth Assister Line to record signature and consent telephonically.
- **The following steps must be taken when completing a CDF:**
 - The Assister should complete the CDF with all applicable information regarding the member/applicant and the Assister.
 - The Assister should then call the MassHealth Assister Line with the member/applicant on the line and request a record of telephonic signature for a CDF as you are working with an individual remotely.
 - Initial CDFs can be completed over the phone at the same time as an application or form.



Instructions for CSRs:	Instructions for Assisters:
1. Retrieve a reference ID for the call. 2. Read the applicable consent including rights and responsibilities for the individual on the line. 3. Ask individual to consent to the telephonic signature. 4. Once the individual consents, make a note within the HIX case with the following: “[<i>refID</i>]: telephonic signature of [<i>individual’s name</i>] recorded for [type of application or form] at [<i>timestamp</i>] on [xx/xx/20xx] with CAC [<i>name of CAC</i>]”.	1. After the CSR has captured the individual’s telephonic signature, begin to complete the CDF. 2. Complete the CDF by signing on the signature field along with the notation that documents the consent as follows: a. If the Assister is completing a paper CDF, you must sign and notate the following: “[CAC name] is signing for [<i>individual’s name</i>] based on authorization provided by [<i>individual’s name</i>] over the phone on [xx/xx/20xx] at [<i>timestamp</i>]”. Include the reference number provided by MassHealth Customer Service. b. If the Assister is completing the CDF via the Assister Portal, download, print, and upload the form using Document Upload of the pre-populated CDF form. At the signature line for Assister, you must sign, and at the signature line for the Applicant, notate the following: “/s/ [Assister name], a certified application counselor at [<i>provider location</i>] signing on behalf of the applicant [<i>individual’s name</i>] based on verbal consent from the applicant via phone on [xx/xx/20xx] at [<i>timestamp</i>]”. Include the reference number you receive from MassHealth Customer Service.



Completing Paper Applications and Forms

- Once the Assister has completed an application or form with the member/applicant, call the MassHealth Assister Line to telephonically record consent and the signature of the individual before submitting the documents.
- With the applicant or member on the line, inform the Assister Line representative you are completing a paper application or form and need to record the individual's signature.

Instructions for CSRs:	Instructions for Assisters:
1. Retrieve a reference ID for the call. 2. Read the applicable consent including rights and responsibilities for the individual on the line. 3. Ask the individual to consent to the telephonic signature. 4. Once the individual consents, make a note within the HIX case with the following: <i>"[refID]: telephonic signature of [individual's name] recorded for [type of application or form] at [timestamp] on [xx/xx/20xx] with CAC [name of CAC]"</i>.	1. After the CSR has captured the individual's telephonic signature, complete the application or form. 2. Sign on the signature field along with the notation that documents the consent as follows: a. <i>"[CAC name] is signing for [individual's name] based on authorization provided by [individual's name] over the phone on [xx/xx/20xx] at [timestamp]"</i>. b. Include the reference number provided by the CSR.



Assister Portal

Completing Applications and Forms via the Assister Portal:

- Assisters can complete the application or form up to the signature page within the online Assister Portal.
- Assisters can call MassHealth Assister Line with the member/applicant on the line and notify the representatives that you have started an application or form with an individual over the phone.
- Assisters should inform the MassHealth Assister Line representative that the member/applicant is on the line and that you are completing a paper application or form and need to record the individual's signature via the recorded line.

Instructions for CSRs:	Instructions for Assisters:
1. Retrieve a reference ID for the call. 2. Read the applicable consent including rights and responsibilities for the individual on the line. 3. Ask individual to consent to the telephonic signature. 4. Once the individual consents, make a note within the HIX case with the following: <i>"[refID]: telephonic signature of [individual's name] recorded for [type of application or form] at [timestamp] on [xx/xx/20xx] with CAC [name of CAC]"</i>.	1. After the CSR has captured the individual's telephonic signature, complete the application or form. 2. Sign the application or form by typing in the individual's name in the signature box and then submit the application or form. 3. The Assister should make note of this telephonic signature capture with the date and timestamp for their own documentation.