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# WIDOWS BENEFIT

PRESERVATION

*Produced by  
Staff Training Unit  
Head Office*



**dsw**

*January 1987*

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Reference:

**PRESERVATION**

30 January 1987

To All Directors and  
Area Welfare Officers

## WIDOWS BENEFIT PROCEDURES HANDBOOK

.....The enclosed procedures handbook has been amended considerably by the Work Documentation Unit and Benefits Division, Head Office.

This handbook now supersedes the APRIL 1986 edition. Please arrange to dispose of all old handbooks and replace with the January 1987 edition.

Additional supplies if required are available from Work Documentation unit, Head Office.

R. White

S.E:O Work Documentation.

ACKNOWLEDGEMENT

SPECIAL THANKS TO

NOLA JENNENS OF PALMERSTON NORTH (RETIRED)  
FOR UPDATING THIS HANDBOOK

AND ALSO TO CHRISTCHURCH OFFICE STAFF  
FOR THEIR ASSISTANCE.

PRODUCED BY:

STAFF TRAINING SECTION  
HEAD OFFICE.

UPDATED and

REPRINTED JANUARY 1987

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# RECORD OF AMENDMENTS

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Amend- ment No.	Entered Init. & Date	Amend- ment No.	Entered Init. & Date	Amend- ment No.	Entered- Init. & Date	Amend- ment No.	Entered Init. & Date
1		14		27		40	
2		15		28		41	
3		16		29		42	
4		17		30		43	
5		18		31		44	
6		19		32		45	
7		20		33		46	
8		21		34		47	
9		22		35		48	
10		23		36		49	
11		24		37		50	
12		25		38		51	
13		26		39		52	

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# INTRODUCTION

# INTRODUCTION AND WELCOME



1. Welcome to the Social Welfare Department. You are now the member of a large team which is concerned with the well being of people. Benefits work may be demanding at times but it is hoped that you will also find it satisfying and rewarding.

Your work plays a vital role in the organisation as many peoples livelihood depend on the benefits you administer. It is therefore important that deadlines are met, work is completed quickly and correctly, and that you have the right attitude. THIS HANDBOOK sets out to help you achieve these requirements, and it is also intended as:

- A. A how to do it guide for use by basic and junior graded staff.
- B. An aid to staff training.

## 2. NOTE

IT IS NOT A REPLACEMENT FOR EXISTING MANUALS AND TO GAIN FULL ADVANTAGE IT SHOULD BE READ IN CONJUNCTION WITH THOSE MANUALS.

If changes occur replacement pages will be issued and these amendments must be recorded on the previous page.

The addition of pages must be restricted to those issued by Head Office.

Issues of the handbook are on a position rather than a personal basis.

Copies are not to be defaced or written on



# WHAT IS THE WIDOWS BENEFIT?

The name is probably self explanatory. However it is money paid to widows with, and in some circumstances without dependent children. Income of the widow in excess of \$2,600.00 p.a. (without children) or \$3,120.00 p.a. (with children) reduces the amount of benefit payable.

Males with dependent children who have been widowed are provided for by way of domestic purposes benefit.

---

## WHERE IS OUR AUTHORITY TO PAY THE BENEFIT?

It is contained in Section 21 of the Social Security Act 1964.

PLEASE READ THIS SECTION

---

## HOW DO WE KNOW WHAT RATE OF BENEFIT TO PAY?

Again the Social Security Act 1964 is the authority. The third schedule at the end of the act sets out the maximum amount of widows benefit payable.

The rates are usually increased at six monthly intervals.

GETTING THE MONEY TO THE WIDOW:

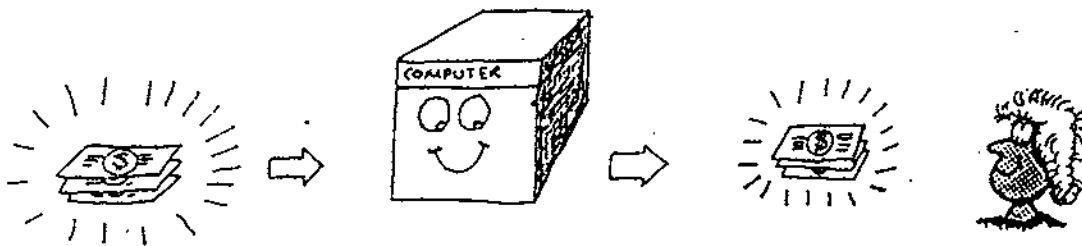
The benefit is paid two weekly by direct credit to a trading or savings bank account, the United Building Society, or the Public Service Investment Society.

Crediting the Money

In a way similar to the public service pay system the computer automatically credits the benefit to the account selected by the beneficiary.

For detailed explanation see Page 107.

Getting the money to the Widow



**BASIC QUALIFICATION**

# WHO QUALIFIES FOR A WIDOWS BENEFIT?

To fully understand the qualifications you must do what was suggested on page 6 - Read section 21 of the Social Security Act. Widows Benefit Manual Part A.2.

The following set out in non legal style is a summary of section 21. (These are the widows who qualify)

- NOTE:** There are three categories:
1. Widows with a dependent child or children.
  2. Widows who have never had a child.
  3. Widows whose child is no longer a dependent.

The latter two categories are designed for older widows who possibly have reduced employment prospects.

## 1. WIDOWS WITH DEPENDENT CHILDREN

### A. Age:

No requirement as to age.

### B. Residence:

#### (i) Dependent child born in New Zealand

No qualifying period of residence required - (Same applies if child born during temporary absence from New Zealand)

#### (ii) If no children born in New Zealand

Three optional residential qualifications:

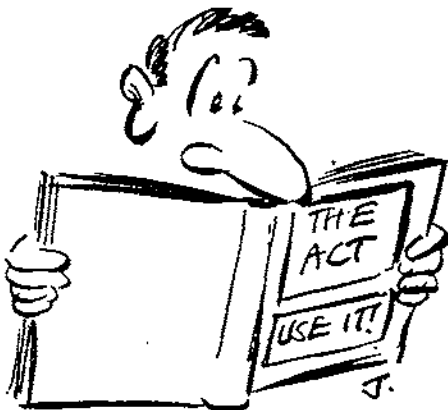
(a) Both widow and husband had resided in N.Z. for 3 years immediately prior to his death.

or

(b) Either widow or husband being ordinarily resident in N.Z. at time of death, has resided here continuously for 5 years at any time.

or

(c) Widow ordinarily resident in New Zealand on date of application and has resided here for not less than 10 years at anytime before husbands death.



### C. Marriage:

DON'T  
OVERLOOK

- No qualification if marriage dissolved (divorced).
- Marriage separations even if long term do not affect qualification.
- If defacto husband dies - refer to a Senior Officer. Possible entitlement to Emergency Widows benefit.

2. WIDOWS WHO HAVE NEVER HAD A CHILD:

A. Age and duration of Marriage:

Two options:

(i) Married at least 5 years and widowed after attaining 50 years.

OR

(ii) Fulfil ALL of the following:

- (a) At least 50 years of age.
- (b) Widowed after age 40
- (c) Married for at least 10 years.
- (d) At least 15 years since married.

B. Residence: - Again Two options

(i) Widow and husband must have resided in New Zealand for the 3 years immediately before his death.

or

(ii) Either widow or husband being ordinarily resident in N.Z. at time of death had resided here continuously for 5 years at any time.

---

3. WIDOW WHOSE CHILD IS NO LONGER DEPENDENT

A. Age and Duration of Marriage

3 Options

(i) Married at least 15 years,

( or

(ii) Aggregate Period of Marriage and later care and control of one under 16 child not less than 15 years.

( or

(iii) Fulfil conditions of widow who has never had a child (See above)

B. Residence: As for widows who have never had a child - (See above)

---

**NOTE:** If married more than once the aggregate periods of any marriage may be taken into account in computing periods of marriage for qualification purposes.

Also see next page.

Qualification for Widows Benefits (continued)

1. ORDINARILY RESIDENT

IMPORTANT

Also in order to qualify all widows and any dependent children must be ordinarily resident in New Zealand.

---

NOTE:

2. OVERSEAS RESIDENCE

(in all cases)

- (a) If residing PERMANENTLY in New Zealand previous residence in United Kingdom and Australia counts as New Zealand residence. See page 86.

2. AGED 60 YEARS

Widows without dependent children would be better off financially receiving National Superannuation.

NOTE: If there is no other income and children are still dependent widows benefit would be more advantageous.

For summary of qualifications  
See next page.



BRIEF SUMMARY OF WIDOWS BENEFIT QUALIFICATIONS

1. Widows with dependent children:
  - (a) Any age:
  - (b) If child not born in N.Z. ...
    - (i) Widow and Husband:
      - Either party in N.Z. for 3 years immediately before death
      - or
      - Either party in N.Z. when husband died, has 5 years continuous residence any time.
      - or
    - (ii) 10 years residence any time before husbands death.
  - (c) Marriage dissolved. No qualification but in order if only separated.

---

2. Widows who have never had a child
  - (a) 5 years marriage, widowed after age 50 years.
    - or
    - at least 50
    - Widowed after 40
    - Married 10 years
    - at least 15 years since married.
  - AND
  - (b) Widow and husband
    - Either party in N.Z. 3 years before death
    - or
    - Either party in N.Z. when husband died, and has 5 years continuous residence any time.

---

3. If residing permanently in NZ, previous residence in the UK or Australia or birth of a child in those countries is treated as if it occurred in NZ.

---

4. Widow whose child is no longer dependent:
  - \*(a) Residence as in 2 and 3 above.
  - (b) Age and Marriage as above
    - or
    - (i) Married at least 15 years.
    - or
    - (ii) Marriage and care of child for 15 years (total)

---

5. ALL CASES: Widow, and any dependent children must be ordinarily resident in New Zealand.

Definitions - see next page.

# DEFINITIONS FOR QUALIFICATION PURPOSES

## WIDOW

A woman who has survived a man to whom she was legally married at the time of his death. Divorced (new term = marriage dissolved) persons do not qualify.

## CHILD

To qualify under section 21(1)(a) the widow must be the mother of a dependent child. A dependent child is regarded as one the beneficiary is maintaining.

## NOTE

STEPCHILDREN and those ADOPTED may be accepted as a dependent child (paragraph D9 four weekly manual refers).

Children BORN OUT OF NEW ZEALAND (some exceptions) do not meet the "child" qualification for Widows Benefit. (paragraph D9 - see above.)

See section 21(1)9a) and 21(2) of the Social Security Act 1964.

Qualifications for widows benefit (continued)

WHAT DO YOU DO IF A PERSON WANTING A WIDOWS BENEFIT DOES NOT SEEM TO MEET ANY OF THE QUALIFICATIONS UNDER SECTION 21 OF THE ACT

The golden rule is that if in doubt take an application (see below\*)

Also

If there is clearly no qualification don't turn the person away but discuss with a senior officer as there may be entitlement to some other benefit like an emergency one or a domestic purposes benefit.

---

HOW DO WE DECIDE IF THE WIDOW MEETS ALL THOSE QUALIFICATIONS FOR A WIDOWS BENEFIT

First an application for widows benefit must be completed:- Form W.B. 1.

Procedures as to the completion of this form are detailed from page 25.

---

REFUSING APPLICATIONS

We cannot refuse to accept an application.

Even if the applicant is clearly ineligible, but insists on applying you must take the application.



# WHAT IS MEANT BY FOUR WEEKLY?

1. Widows, invalids, orphans, and miners benefits are at times referred to as four weekly benefits. The term is confusing as although the benefits were once paid each four weeks they are now paid two weekly.

However what has been retained is a four weekly pay period

2. What is this pay period?

Essentially to ease renewal of benefits the department breaks 52 weeks in to 13 periods. These periods which of course = 4 weeks are termed pay periods and also are the basis of renewal codes. They are numbered 1-13. The particular renewal code allocated depends on the date from which the benefit is granted.

- 3.

The Social Security Act frequently mentions pay period, and the beginning of the period is used in some instances as the starting date for grants of benefit or for the commencement of a review of benefit.

- 4.

Each Pay period has 2 pay days or due dates for example:

16.9.\*\* - 13.10.\*\* = one pay period  
22.9.\*\* and 6.10.\*\* are the benefit pay days.

5. The term "Four Weekly" and the Public

When communicating with the public especially when answering the phone dont mention terms like "four weekly section" as to outsiders it will be absolutely meaningless.

6. Social Security Benefits

Sometimes the benefits mentioned above (W.B., I.B., M.B. and O.B.) are referred to as Social Security Benefits.



To prevent confusion with outsiders avoid this term for categorising such benefits as any benefit paid under the Social Security Act such as family, D.P.B. and unemployment are in fact Social Security benefits

# DEALING WITH THE PUBLIC



# DEALING WITH THE PUBLIC

1. Introduction
2. Privacy
3. How to say no
4. Is our service up to standard?
5. Don't under estimate your own influence
6. Final comment

## 1. INTRODUCTION

Our aim is friendly, helpful and courteous service.

The public will include people enquiring about, applying for or receiving a widows benefit.

NOTE: It requires no elaboration as to the effect a close relatives death may have on a person. Understandably, widows may be in a state where they will find the requirements of official organisations like Government Departments very demanding.

Extra sensitivity on your part is called for.

### ALSO

When dealing with the public it is necessary in every case to be

- Tactful
- Patient
- Understanding

Don't rush interviews

- create a relaxed atmosphere.

Be pleasant and respond POSITIVELY to any needs indicated by applicants or beneficiaries.

---

Be sure the information you give is correct. Don't guess. If you are not sure of your facts excuse yourself from the interview and find out.

People are sometimes referred to as:

Applicant - Person who has applied for a benefit.

Beneficiary - Person who receives a benefit.

Client - Any person who has dealings with the Department.

The need for privacy next page.

## 2. PRIVACY

Many of our interviews require very personal questions to be asked. In some instances the questions may be of an intimate nature or potentially embarrassing.



### Remember:

- Be Sensitive
- Ensure Confidentiality is preserved AT ALL TIMES, and interview rooms, when available, should be used whether requested or not.  
As a minimum, use screened partitions for interviews.



### 3. HOW TO SAY NO

On occasions it may be necessary in the office or over the phone to convey unfavourable explanations to beneficiaries or applicants.

- i.e. You may have to explain that benefit cannot be  
\* paid above a certain rate or there is no entitlement at all.

It is difficult to say no and still have a satisfied customer.

It is therefore important that unfavourable decisions are communicated fully in a pleasant way .....

If you are not confident or are unsure of all the facts have a senior officer do the explaining.

It is our responsibility to ensure beneficiaries or applicants depart satisfied, that they have been treated fairly and have received an adequate explanation.

#### REMEMBER:

- 1.\* Any file decisions affecting payment must be conveyed in writing and review provisions included - (See page 218).
2. If a benefit is granted at a reduced rate the beneficiary must be informed of how the reduced rate has been assessed.
3. Also if beneficiary or applicant verbally expresses dissatisfaction as to some decision this constitutes an application for review of decision.

-- in such instances an application for review must be invited. This application is to be entered in the appropriate register.

-- Procedures in Part Y, Four Weekly Manual then follows. See page 232.

continued.

#### 4. IS OUR SERVICE UP TO STANDARD?

A. Using the approach suggested in the last few pages will go a long way in ensuring a satisfactory service to the public.

Consider the following:

- What was your reaction when you experienced poor service at a shop, office, garage, or other Government Department.
  - Do you treat people the way you would like to be treated?
  - Our service is a unique one - our customers have not got competitors they can go to!
  - Your way of dress (See page 244) and manner - is it acceptable within an office setting?
- 

#### B. Also don't neglect the Public

The Department primarily exists to serve the Public. Your actual job may not be directly involved with this service aspect.

But

does the client or beneficiary realise this when waiting for service and is ignored by you walking past or standing around.

HELP ALL YOU CAN WHEN YOU CAN

At least go up and ask the person if you can help. You may have to direct them to the proper source but you may be able to solve the query on the spot.

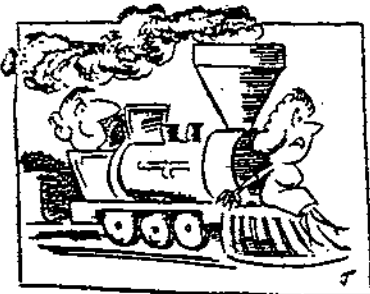
---

#### C. APPLY YOUR COMMON SENSE

We are not a railway yard. Don't shunt the beneficiary from person to person or from section to section.

You find out what is required or if you don't know ensure beneficiary is referred to a person who does.

continued.



5. DON'T UNDERESTIMATE YOUR OWN INFLUENCE

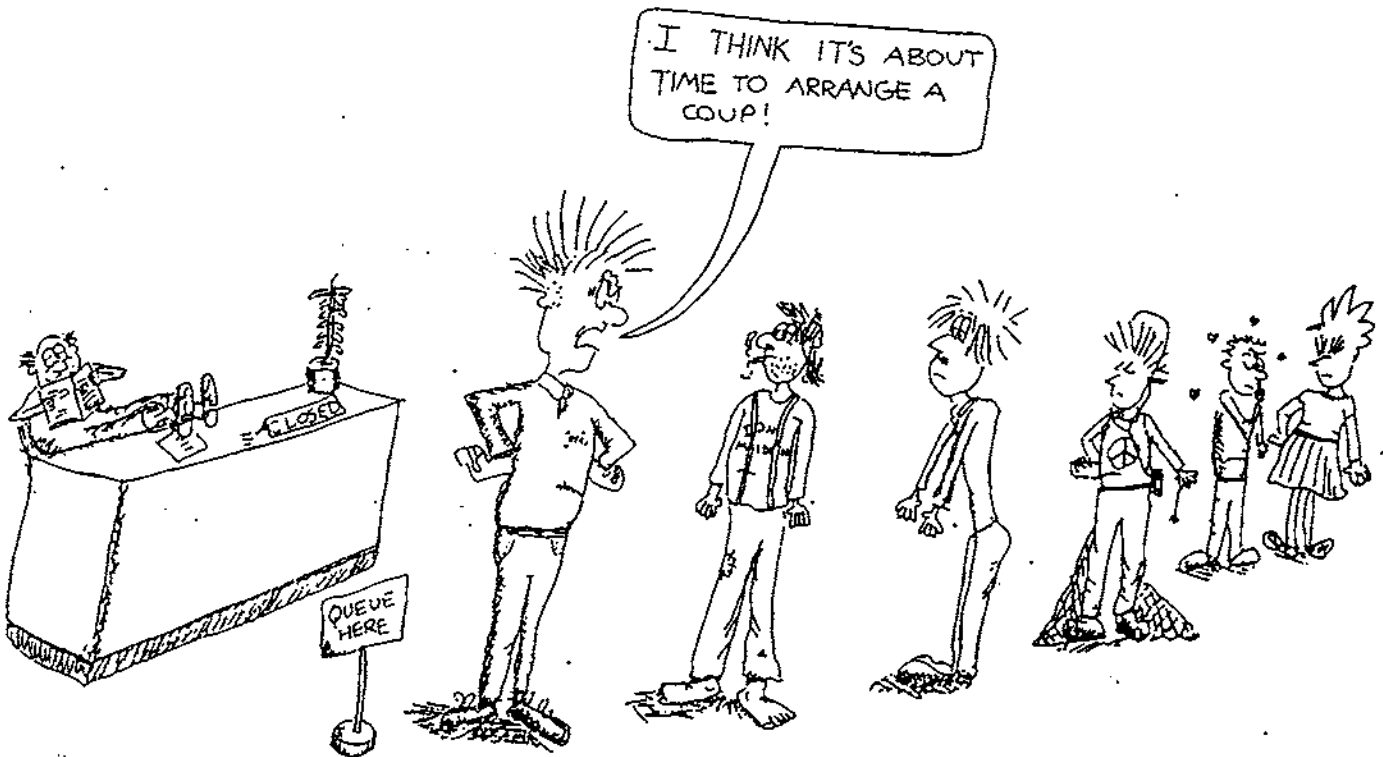
If you attend to people in a confident, positive and pleasant way they will most likely respond the same way.

TRY IT OUT

But if you display an overbearing or arrogant manner the reaction from beneficiaries may understandably be negative or unreasonable.

Take a break and reflect:

How do you react when in making a query to some service organisation like ours and the person behind the counter tries "to put you down" by being overbearing, arrogant or showing disinterest. ?



6. FINALLY

A. Disputes

You may encounter unreasonable persons.

Nothing will be achieved by trying to match their argument or adopting an aggressive manner.

Politely excuse yourself. Hand the matter to a more senior officer who will be experienced in dealing with such persons.

B. Your Speech

(i) One of the most fundamental aspects of public relations.

BUT

Also one of the most common causes of complaint.

(ii) The following is obvious but it is easy to offend if you don't apply it:

AT ALL TIMES SPEAK:

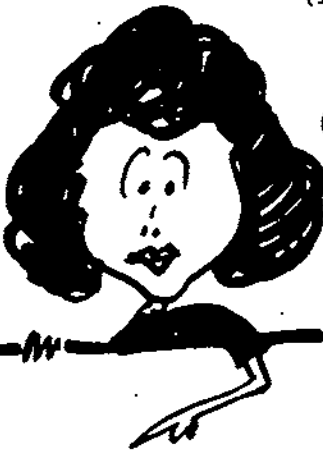
- Clearly
- Pleasantly
- In a simple language.

(iii) Like your letter writing

Don't use jargon or big "impressive" words.

(iv) REMEMBER:

The words please and thank you still form the basis of human politeness.



REMEMBER:

The Departments aim is to provide friendly, helpful, courteous service.

You as employees of the Department are obliged to ensure this aim is fulfilled.

SELF-TEST QUESTIONS

Do not write on this page

If you are not sure of the answer to any question read the Section again. You will find the answer there.

1. Where is our authority to make payment of Widows benefit?
  
2. Does the fact that applicant was separated from her husband affect qualification for widows benefit?
  
3. If applicant does not appear to meet the qualifications for widows benefit under Section 21 should you still take an application?
  
4. When dealing with the public you must be 1  
2  
3
  
5. Where should you interview or discuss matters with an applicant or beneficiary?

ANSWERS

1. Section 21 of the Social Security Act 1964.
  
2. No. However there is no entitlement where the marriage has been dissolved. (Divorced)
  
3. Yes. If in doubt an application should always be taken. If there is clearly no qualification entitlement to another benefit type should be looked at.
  
4.
  1. Tactful.
  2. Patient.
  3. Understanding.
  
5. In an interview room or if not available a private situation.

# **APPLICATION PROCEDURES**

# INVITING APPLICATIONS - SERVICE TO WIDOWS

Reference: Part B  
Widows Benefit Manual

IMPORTANT

The Department has a responsibility to identify women recently widowed and invite an application for widows benefit.

Local procedures apply but the usual system is for records staff to scan the death notice in the local newspaper.

- Following on from this .....

1. Death Notice pasted onto S.W. 242.
2. Indexed.
3. Referred to widows section.
4. Place on file if application already received.
5. If no application send this letter.

"Dear Mrs .....

I have learned with regret that your husband has recently passed away and I am writing this letter to let you know that my Department can assist you by way of a benefit under the Social Security Amendment Act if you are in need of immediate assistance. To enable the Social Security Commission to give urgent consideration to your case, I suggest that:

- (1) you complete the enclosed form of application and return it to me as soon as possible. The question of granting you some immediate help will be considered and later your eligibility for a widows benefit under the Social Security Act will be decided.
- (2) Even if you do not require immediate assistance, you should enquire at the nearest Social Welfare office concerning payment of the lump sum payment after the death of your husband. However, if your husband died as a result of injuries sustained in an accident the lump sum payment would be made by the Accident Compensation Corporation and in this event your inquiry should be made to the State Insurance Office.

If there is any further information you would like, please let me know and I shall be happy to assist you.

Yours faithfully,

Director/District Agent

- (1) Enclosed Forms W.B. 1 - Application for Widows Benefit  
S.W. 231 Application for lump sum  
payment after death.

6. File as miscellaneous correspondence.




# APPLICATIONS:

## INTRODUCTION

Reference: Part L - Four Weekly Manual.

To receive the widows benefit the first step is to complete form W.B. 1 - (application for widows benefit).



The image shows a form titled "APPLICATION FOR WIDOW'S BENEFIT" with a grid of fields for personal and financial information. The form is partially filled out with handwritten text. The title is at the top left, and there are several sections with headings like "Personal Details", "Financial Details", and "Declaration". The form is a standard application form with various checkboxes and text entry areas.

Set out on the next few pages are the steps to be followed from the time the beneficiary calls at the office to apply for widows benefit to actual payment of benefit.

The steps are broken into three main stages:

1. Lodgement of application and interview procedures.
2. Pre-grant verification including inquiry form issue.
3. The grant action including arranging payment. (also called assessment).

An application example page 26 is based on a straightforward situation. Widow in employment with dependent children. Husband recently died of natural causes.

Complications that may arise from aspects such as overseas residence and accident compensation etc are covered on subsequent pages.

Also our responsibility in inviting applications from women recently widowed is explained on page 23.

# STAGE ONE...

## LODGEMENT OF APPLICATION AND INTERVIEW PROCEDURES

Remember on page 12 we said that in order to sort out if a person qualifies for widows benefit an application - Form W.B. 1 must be completed.

The majority of these widows benefit applications are lodged personally at the office.

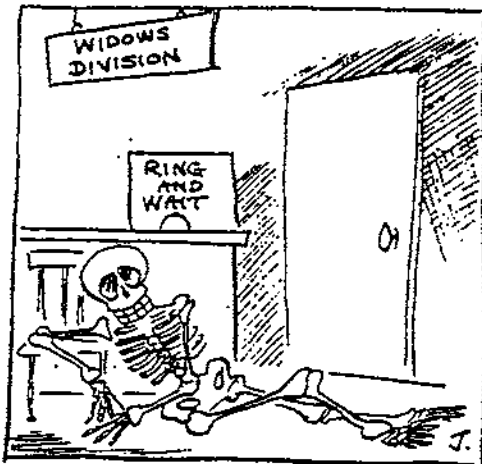
Also

Most applications are from widows with dependent children born in New Zealand, and personal income is usually below the exemption of \$3,120.00 (exemption with children) per annum.

When the widow does come to the office to apply your INITIAL APPROACH is very important.

It is essential that you:

1. Greet callers by their name in a pleasant manner.
2. Dont forget in most cases the applicants husband has just died.
3. Avoid: bureaucratic atmosphere, office jargon, adopting a superior attitude
4. A smile costs nothing.
5. Dont smoke or chew.
6. Create a relaxed atmosphere and deal personally with each applicant.
- 7.



Form W.B. 1

IMAGINE

- (a) How would you feel if you were in the widows place.
- (b) How would you like to be dealt with

On the next page is an example of a typical widows benefit application.

The next page also explains what is required in the completion of such applications

APPLICATION EXAMPLE.

(SOMETIMES THE APPLICATION IS REFERRED TO AS A CLAIM).

### APPLICATION FOR WIDOW'S BENEFIT

(Under the Social Security Act, 1964)

WB

All questions on this form must be answered, the word "NIL" or a stroke meaning "nil" being inserted against each question where applicable. Blanks will not be accepted.

To the Director,  
Department of Social Welfare, WELLINGTON

No. \_\_\_\_\_  
Index: \_\_\_\_\_  
F.P. \_\_\_\_\_

I, the undersigned, hereby apply for a widow's benefit.

My full name is (Please Print) JONES JENNIE  
(Surname) (Christian names or first names)

My former name (or names) was JENNIE SMITHSON Telephone No. (if any) 850139  
were

My full address is 920 THE TERRACE, WELLINGTON

I was born at GORE NEW ZEALAND, on the 25<sup>th</sup> day of OCTOBER 1953  
(Town or parish) (Country) (Submit birth certificate if available)

My parents names were—Father: CHESTER ARCHIBALD SMITHSON Mother: GERTRUDE SMITHSON

I first arrived in New Zealand on the N/A day of N/A 19      
at the Port of N/A on the ship/airline N/A

Were you or your husband absent from New Zealand during the 3 years immediately preceding his death? NO  
If so, supply details of absences:

Have you made any previous application for a pension or benefit either in YES If so, state \_\_\_\_\_ Class of pension or benefit: FAMILY  
New Zealand or overseas? \_\_\_\_\_ Where applications made: WELLINGTON

I was married at ALEXANDRIA on the 25 day of OCTOBER 1953  
Full name of husband: JOHN ZERO JONES (Submit marriage certificate if available.)

Date of death of husband: 07-01-87 Place of death: LOWER HUTT

Was your husband's death the result of an accident? (YES or NO) NO  
If YES have you applied for Accident Compensation? (YES or NO) NO  
Were you and your husband living together at the date of his death? (YES or NO) YES  
If "NO", have you commenced any proceedings in divorce? (YES or NO) NO  
Date and place decree nisi or absolute granted: N/A

Name and address of the administrator of your husband's estate and brief particulars of the assets (including life insurance) MR SHARKY - EAGLE LEGALS LTD - BARRISTERS and SOLICITORS, Box 99, WATON  
SMALL BANK ACCOUNT AND LIFE INSURANCE £350-000

Was your husband a contributor to any Superannuation Fund, National Provident Fund, or similar Fund? If so, supply particular NO

Particulars of my children under 16 years of age and of those over 16 still at school:

Full First Name of Child	Date of Birth	Place Where Birth Registered	With Whom Child Now Residing	If Child Attending School, Name of School
<u>KRISTLE</u>	<u>01-06-73</u>	<u>WARRINGTON</u>	<u>myself</u>	<u>WELLINGTON GIRLS</u>
<u>JADE</u>	<u>10-06-76</u>	<u>WANAKA</u>	<u>myself</u>	<u>EVANS BAY INT.</u>
<u>NORMAN</u>	<u>08-05-78</u>	<u>ARADWTON</u>	<u>myself</u>	<u>CLIFTON TCE.</u>
<u>DAVID</u>	<u>29-02-80</u>	<u>ALEXANDRIA</u>	<u>myself</u>	<u>CLIFTON TCE.</u>

Particulars of other Children born to me (Include any children since deceased):

Full First Name of Child	Date of Birth	Place Where Birth Registered	If Child Deceased, Furnish Date and Place of Death

\*I HEREBY  
(a) authorise the Department of Social Welfare to pay all instalments due to me to my bank account,  
(b) direct the bank manager to accept from you as my agent any amount that may become due in terms of this authority.

\*DETAILS OF ACCOUNT  
Please pay all instalments of benefit due to me to the credit of my account with:  
POST OFFICE SAVINGS BANK at TE ARO (Branch Office)

The account is in the name of: JENNIE SMITHSON - JONES

BANK	BRANCH	ACCOUNT	SUFFIX
<u>111</u>	<u>7328</u>	<u>03169281</u>	<u>310</u>

and is numbered \_\_\_\_\_

Please present your book for noting. \_\_\_\_\_ Details of A/c shown are correct  
B. Jeller for Director/Manager

Official Stamp

Continued \*

Reverse of form next page.

**REVERSE OF W.B. 1 APPLICATION**

My Income During the 12 Months Preceding This Date		Amount \$
1	Salary, wages or other personal earnings	3600.00
2	Gross income from business, shop, farm, sale of produce, commission, etc. (If expenses were incurred in the production of this income produce a profit and loss account or statement of expenses)	nil
3	Amount received from boarders including children over 16 years (..... boarders at ..... per week.) Members of family YES/NO. (..... boarders at ..... per week.) Members of family YES/NO.	nil
4	Allowances from relatives or others, including the value of board and lodging received free or for services rendered	nil
5	Gross rent from property (including rooms let) Where rooms are let please state: Either - Total weekly rent paid by you (produce rent book) ..... \$ nil Or - Annual outgoings by way of mortgage interest, rates, insurance and repairs, paid by you (produce receipts) ..... \$ nil	nil
6	Compensation or damages received	nil
7	Superannuation, pension or benefit (No. ....)	nil
8	Dividends from shares or interest from debentures, bonds or stock	nil
9	Interest on money lent, in P.O.S.B., in National Savings, any other bank or elsewhere	\$2000.00
10	Money received from any other source (such as annuity, legacy, life insurance, lodge, etc.)	\$196.00

Name and address of employer or other person from whom above income received:  
 Item: 1 Earnings - \$10 per hour from My Fished, Escort Service Ltd.  
 Item: 9 P.O.S.B. interest  
 Item: 10 Grandmother's (Molly Gold Finger) ESTATE via Rumpel and Bailey, Barristers and Solicitors (C/O J. Manganaka)

Do you expect to receive any income during the next twelve months? If so, give details: possibly small amount from MILDREDS ESTATE

Property Owned in New Zealand or Elsewhere by Me		Amount \$
1	Land and buildings: (a) Used as my (our) home: ..... (b) NOT used as home (give address): .....	\$70,000.00
2	P.O.S.B. A/c No. 4: 26 93, 11 32 23: 30 at <u>Quekettom</u> (produce book)	\$2000.00
3	National Savings A/c No. .... (produce book)	nil
4	Money in any other bank (produce bank book, or state where account kept) (Bank): ..... (A/c No.): .....	nil
5	P.O.S.B. Thrift Club at ..... (A/c No.): ..... (Club): .....	100.00
6	Money not in bank or invested: .....	nil
7	Money lent to, or in hands of, any person (give name and address): .....	nil
8	Livestock (give particulars): .....	nil
9	Plant and machinery (give particulars): .....	nil
10	Government stock, shares, debentures, or bonds in any company or society (give particulars): .....	nil
11	Interest in business, stock in trade, or venture of any kind (give particulars): .....	nil
12	Any other property or assets not specified above including interest in any estate (give particulars): .....	nil

Above property (item ..... ) is mortgaged or otherwise secured to (name): N/A of (address): ..... Interest is paid to (name of agent or solicitors): .....

The name and address of a person (not a relative) who can confirm my residence in New Zealand:  
Abigail Snodgrass - Windsor, 420 Aniseed Grove, Woburn  
 I, JENNIE JONES of 420 THE HERIAGE, Woburn  
 (Name in full) (Place of abode)  
MANAGER (Occupation) ..... solemnly and sincerely declare  
 that the contents of this application are true and correct and that no particular which would affect the amount of benefit granted has been omitted.

Signature of applicant: J. Jones

Completion details next page.

REMEMBER: Widows Benefit is now taxed and Family Support paid. Also - when taking an application you require and I.R.D. Number.

APPLICATION FORM COMPLETION

If applicant calls at the office and has not filled out the W.B. 1.

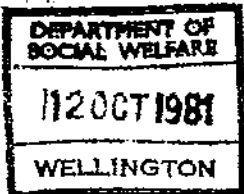
Your job is to:

1. Provide the form and suitable place to write.
2. Request widow to complete the form herself, but if she has difficulty provide assistance.

With all applications ensure:

3. ALL QUESTIONS FULLY ANSWERED in ink, not pencil or eraseable ball point.
4. Check Again:
  - Surname distinguishable.
  - Full residential address.
  - Telephone number.
5. Don't forget the DATE STAMP. (not in top left hand corner, file pin may obliterate necessary details).

The date stamp is essential as:



- (a) It may have bearing on the entitlement date.
- (b) Prevents dispute as to what date application received.

6. Full details of where any income declared )  
is derived i.e. source and nature, names ) Verification forms may  
and address. ) have to be issued.  
)
7. Details of birth, marriage and husband's )  
death clear )
8. Dependent children details fully set out - can widow remember family  
benefit number.
9. Inland Revenue Department number obtained.
10. Finally - Has the application been SIGNED - We can't process it until  
the widow signs it.
11. REMEMBER
  - (a) Although there does not appear to be qualification for  
widows benefit don't turn applicant away - perhaps  
entitlement to DPB or an emergency benefit.
  - (b) If it is apparent applicant does not qualify but  
insists on applying an application must be taken.

Interview details next page.

## THE APPLICATION INTERVIEW

With the application form fully completed the next step is to interview the applicant:

Maintaining that pleasant attitude you also must:

(Remember pages 15-21)

- (i) Even if busy do not give impression that the interview is being hurried.
- (ii) Don't forget use that interview room.
- (iii) If privacy not possible take extreme care to preserve applicants confidentiality.

(Also if applicant is aware  
other people can hear  
relevant points may be withheld.)

- (iv) Are you properly attired.
- 

### Previous Papers

If the application form indicated previous papers. Get out the old file. It may assist the interview, or there may be something that was not cleared up at the time of cancellation.

The interview is carried out  
by completing an interview  
sheet -- see next page.

**THE INTERVIEW SHEET**

Should be completed  
for every application

Serves as a reminder that  
important points have been  
covered.

There is not a standard interview sheet - The example below is a suggested format only, and the answers to the questions are based on our application example page 26.

<p align="center"><b>PLEASE PRINT NAME</b></p>	
1. NAME OF APPLICANT:	<i>John Jones</i> <span style="float:right">What is to return and amount if necessary?</span>
2. APPLICATION FORM(S):	<ul style="list-style-type: none"> <li>- All questions answered.</li> <li>- Don't write comments on the form - applicant to initial amendments.</li> <li>- Postal phone number provided?</li> </ul>
3. BANK CERTIFICATE:	<ul style="list-style-type: none"> <li>- Interest details or photocopy - verify.</li> <li>- Don't register - complete (S22), secondary evidence details.</li> </ul>
4. MARRIAGE CERTIFICATE:	<ul style="list-style-type: none"> <li>- Good name in birth certificate.</li> <li>- Interest details or photocopy - verify.</li> </ul>
5. DEATH CERTIFICATE:	<ul style="list-style-type: none"> <li>- Right any evidence if produced. <i>no</i></li> </ul>
6. EMAIL DETAILS:	<ul style="list-style-type: none"> <li>- Record number if available. <i>File not here under</i></li> <li>- Any other benefits payable. <i>no</i></li> </ul>
7. BENEFIT IN DEATH:	<ul style="list-style-type: none"> <li>- Make application if husband under 65 and death not result of accident.</li> </ul>
8. ACCIDENT COMPENSATION:	<ul style="list-style-type: none"> <li>- If husband's death result of accident have S22 completed.</li> <li>- Applicant to call at State Insurance to apply for S22 and keep on in line of benefit in death. <i>no</i> <span style="float:right">* at S22 office</span></li> </ul>
9. TAXES:	<ul style="list-style-type: none"> <li>- Any distribution made. <i>no</i></li> <li>- Name and address (S22) of Collector of Stamp duties or Administrator. <i>See S22</i></li> </ul>
10. ANNUAL STATEMENT:	<ul style="list-style-type: none"> <li>- Keeping or maintaining any bank - child applicant program.</li> <li>- Association benefit - make application if withdrawal approved. <i>no</i></li> </ul>
11. INSURANCE/RETIREMENT CONTRIBUTIONS:	<ul style="list-style-type: none"> <li>- If appropriate make applications.</li> </ul>
12. DEPENDENCY:	<ul style="list-style-type: none"> <li>- If applicant or dependent disabled - consider Disability Allowance application. <i>no</i></li> </ul>
13. RESIDENCE:	<ul style="list-style-type: none"> <li>- If required to qualify. - A. Details for State S22. A or B.2.11.</li> <li>OR</li> <li>- Documentary evidence of arrival if doubt as to S22. <i>no</i></li> </ul>
14. FINANCIAL DETAILS:	<ul style="list-style-type: none"> <li>- If all details shown received from - right any documents</li> <li>- S22 attachment to Article 14 - State Pension - S22 S22 S22 accepted.</li> </ul>
15. INCOME AND ASSETS:	<ul style="list-style-type: none"> <li>- If declared income over £100 p.a. verification will be required.</li> <li>- (i) Get full name and address of source of income.</li> <li>- (ii) Interest bank account details form S22.</li> <li>- (iii) Other income record - verification on minute sheet.</li> <li>- (iv) Self-employed or business income: <ul style="list-style-type: none"> <li>- Request latest profit and loss account.</li> <li>- Date of account.</li> </ul> </li> </ul> <p><b>NO VERIFICATION REQUIRED IF INCOME FROM S22.</b></p> <ul style="list-style-type: none"> <li>- If husband was employed by a local body or Government Department were contributions made to National Provident or Government Superannuation? <i>no</i></li> <li>- Record explanation of any unusual transactions. <i>no</i></li> </ul> <p><b>REMARKS:</b></p> <ul style="list-style-type: none"> <li>- Future intentions.</li> <li>- Current wage - will it vary? <i>To confirm weekly at 100.00</i></li> </ul>
16. Inland Revenue Number:	<i>no</i>
17. VISIT RIGHTS:	<ul style="list-style-type: none"> <li>- Received? <i>no</i></li> <li>- Service in widow.</li> <li>- S.2.8.</li> </ul>
18. REMARKS CONCERNING SPECIAL FEATURES:	<i>no</i>
19. VISITING FILE:	<ul style="list-style-type: none"> <li>- If possible right before applicant departs. (Don't delay unnecessarily).</li> </ul>
20. SOCIAL WORKER:	<ul style="list-style-type: none"> <li>- Ask with authority if would like to speak to Social Worker.</li> </ul>
21. SIGNATURE:	<p align="center">(If necessary continue notes on minute sheet)</p> <p>DATE: <i>10.10.99</i> SIGNATURE: <i>J.A. [Signature]</i></p>
22. FILE THIS SHEET TO THE APPLICATION FORM.	

What details should you  
obtain -- see next page.

SOME OF THE POINTS TO BE COVERED ON THE INTERVIEW SHEET:

A. Birth and Marriage details

Obviously to decide on entitlement these have to be verified.

There are four ways this can be carried out.

- (i) If certificates provided at interview, arrange photocopy and hand originals back to applicant. Attach copies to interview sheet. The photocopy must be certified that it is a copy of the original.
- (ii) If there are no photocopy facilities - Extract the details on form S.W. 2A & S.W. 2B - Have a graded officer check.
- (iii) If applicant didn't bring her certificates ask her to post them or bring them to the office. Any delay could hold up the application. - Note the interview sheet of the arrangements.

Ensure: Applicant also sends a covering note with any certificates. Why? A birth certificate in her maiden name may be impossible to match up with a widows application in her married name.

NOTE:

Any Certificates received via the mail must be copied without delay and returned by registered mail (local procedures apply).

- (iv) If applicant doesn't possess the Certificates, we will have to arrange verification. Full details required e.g. where born, married exact dates. Parents full names etc See page 88.



WE MUST SEE THE ORIGINAL CERTIFICATE - NEVER ACCEPT A PHOTOCOPY DIRECT FROM APPLICANT

B. Income and Assets

- (i) Income over \$2,600.00 p.a. (\$50.00 p.w.) reduces the benefit payable to applicants without dependent children and income over \$3,120.00 p.a. or (\$60.00 p.w.) reduces the benefit payable to applicants with dependent children.
- (ii) we are only interested in the income or possible income from ASSETS. See page 118
- (iii) Income only requires verification if the declared income is \$2,548.00 p.a. and over for applicants without dependent children and \$3,068.00 p.a. and over for applicants with dependent children.
- (iv) If income is over the above limits ensure sufficient details (full name and addresses) etc recorded for ease of verification.
- (v) Can applicant help by producing bank pass books, share Certificates etc. Extract details on S.W. 265 or on minute sheet:
  - Name of branch of organisation e.g. POSB, MARAC.
  - Amount of investment e.g. balance of bank account.
  - Interest rate
  - Account Nos. etc.
  - Unusual features.
- (vi) Dont waste your time verifying details if income is under the above limits.
- (vii) If husband was employed by local body or Government Department --- was he a contributor to the Superannuation Fund?



## INTERVIEWING (continued)

Obtaining those details mentioned on the previous page completes the bulk of the interview but the following points also have to be covered:

1. EARNINGS  
These come under the heading of income but special provisions apply. See page 130.
2. HUSBANDS ESTATE  
Unless widow can provide further details only requirement at this stage is to obtain Solicitors name, firm, and address. See page 73.
3. PAYMENT TO BANK ACCOUNT, UNITED BUILDING SOCIETY, OR PUBLIC SERVICE INVESTMENT SOCIETY  
If this has been requested on application form. Form S.W. 96 must be completed. See example next page.
  - (i) If widow has bank book with her: - check account name and number - have graded officer sign bottom of form.
  - (ii) If bank book etc not produced - widow must take the S.W. 96 to the bank for verification or bring the bank book into the office later.
4. FROM OVERSEAS  
(especially Australia or United Kingdom.)  
Special provisions apply. See page 95.
5. NOT NATURAL MOTHER OF DEPENDENT CHILDREN
6. TELEPHONE - Take concession application if appropriate. See page 218.
7. ACCIDENT COMPENSATION  
If husbands death was as a result of an accident. There may be entitlement to accident compensation. Procedures page 84 apply.
8. BENEFITS ON DEATH  
If husbands death was not an accident and the net value of his estate was less than \$10,000, Lump Sum Payment after Death application should be taken - See page 76.
9. ACCOMMODATION DETAILS  
- Entitlement to Accommodation Benefit.  
See page 141.
10. ADDITIONAL NOTES  
If necessary record neatly and clearly on a minute sheet. Sign and date. Never write in obscure places like the side of the application form you may invalidate it.  
  
DO TAKE NOTES - MOST MEMORIES ARE NOT RELIABLE  
Think of others who may have to give a decision on the file without your presence.

Example of Form S.W. 96  
(Payment to Bank Account)

S.W. 96

## NOTICE OF AUTHORITY FOR PAYMENT TO A BANK ACCOUNT

It is important that you read the instructions on the reverse before completing this authority.

	OFFICE USE ONLY											
<p style="text-align: center;">District <b>04</b></p> <p style="text-align: center;">Benefit Number <b>02896210</b></p> <p style="text-align: center;">Appt. Code <b>0</b></p> <p>(Type of Benefit or Pension) (Quote from identity certificate or payment order)</p> <p>NAME: <u>JENNIE JONES</u> (Print name in full)</p> <p>ADDRESS: <b>C O B</b> <u>920 THE TERRACE, WELLINGTON</u> (New address)</p> <p><u>N/A</u> (Previous address)</p> <p>I hereby authorise the Department of Social Welfare to pay all instalments due to me to the credit of my account with the:</p> <p><u>POST OFFICE SAVINGS</u> at <u>WELLINGTON</u> (Name of Bank) (Branch Office)</p> <p>The account is in the name of: <u>JENNIE JONES</u> (Please print)</p> <p>The account number is:</p> <table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <th>Ident.</th> <th>Bank</th> <th>Branch</th> <th>Number</th> <th>Suffix</th> </tr> <tr> <td><b>B 1 4</b></td> <td><b>1 1</b></td> <td><b>7 3 2 8</b></td> <td><b>0 3 6 9 2 8 1 3 0</b></td> <td></td> </tr> </table> <p style="text-align: center;">(Quote from Passbook or Deposit book)</p> <p>Signature: <u>Jennie Jones</u></p> <p>Date: <u>12/10/81</u></p> <p>PLEASE HAVE YOUR ACCOUNT NUMBER VERIFIED BY YOUR BANK IN THE PANEL BELOW OR PRODUCE YOUR BANK BOOK FOR NOTING.</p>	Ident.	Bank	Branch	Number	Suffix	<b>B 1 4</b>	<b>1 1</b>	<b>7 3 2 8</b>	<b>0 3 6 9 2 8 1 3 0</b>		<p style="text-align: center;">TYPE <b>E</b></p> <p>Check Initials</p> <p>Information Code <b>C</b></p> <p>Postal Code</p> <p>Information Codes: 07—For National Superannuation 13—For Other Benefits/Pensions (Complete if change of address to be recorded)</p> <p>Date Transfer effective</p> <p>Init: _____</p>	<p>Department of Social Welfare</p> <p><u>WELLINGTON</u></p> <p>Account details shown above correct (as amended)</p> <p style="text-align: center;">DATE STAMP</p> <p><u>12/10/81</u></p> <p style="text-align: center;"><i>J. H. Spence</i> for Director</p> <p style="text-align: right;">Action Complete</p>
Ident.	Bank	Branch	Number	Suffix								
<b>B 1 4</b>	<b>1 1</b>	<b>7 3 2 8</b>	<b>0 3 6 9 2 8 1 3 0</b>									
OFFICIAL USE ONLY												

What to do after the interview next page.

AFTER INTERVIEW

Explain broadly

- A. Possible amount of benefit payable, and approximate commencement date.
  - B. Income exemption. Position re earnings or other income. See pages 118 and 130.
  - C. How payment will be made - Bank, Building Society or P.S.I.S. Credit System.
  - D. Renewal required after 12 months.
  - E. The time being taken to finalise applications - be realistic - but ensure this is not interpreted as a promise.
- 

Your Knowledge

Is it sufficient to supply all this information?

It takes time to learn it all.

- Do not Guess - Check Up

APPLICANT MUST LEAVE HAVING RECEIVED  
ACCURATE INFORMATION AND ALSO WITH  
THE IMPRESSION THAT A SYMPATHETIC  
HEARING WAS RECEIVED, AND THAT ACTION  
ON THE APPLICATION WILL BE PROMPT AND JUST.

Inexperience:

If inexperienced in taking applications - have a senior officer check the application prior to applicant's departure.

---

Finally

ASK: (i) Applicant if there is any thing she would like to know regarding the benefit or other services offered by the Department.

(ii) Phone Number: If not provided on the application form obtain contact phone number.

---

Perhaps URGENT PAYMENT is required  
see next page.

# URGENT PAYMENTS

## Attitude:

If urgent assistance is requested or appears necessary, as well as discussing with a senior officer the case must be considered with:

Tact and sympathy.

## Who may need an urgent payment?

Possibly widows with dependent children who have been left without ready cash resources.

## What do you do?

Do not commit yourself as regards any type of payment until matter discussed with a senior officer as this person must give the decision.

## How do we make the payment?

Three options.

1. Grant of Emergency Unemployment benefit.
2. Special needs grant (SNG).
3. Grant the widows benefit.

Can be arranged on day assistance is requested

1. Emergency Unemployment Benefit

A temporary benefit paid weekly pending grant of the widows benefit. For procedure see Part B Widows Benefit Manual.

2. S.N.G.

Single payment made by cheque (handed to the applicant in the office) or daily direct credit.

Both the above payments are recovered from the subsequent widows benefit grant.

3. Grant the widows benefit: Do this providing you have the necessary verifications. The first payment could be handed personally to applicant.

## ALSO:

Ask applicant if she has approached her late husbands employer. There could be some outstanding pay waiting to be collected or ready to be sent to her.

NOTE: The actual widows benefit grant is the preferred option as applicant receives her full entitlement quickly. Prevented is the double action of recovering the service to widows or S.N.G. payments from future benefit grant.

Inviting applications see next page.

THE FINAL STEP

Immediately after writing up your notes:

1. Pin all application papers together.
2. Refer to your local index.

The index section will --

- (i) Make an Alpha Common Index Inquiry to check if there is a Common Index master record for the applicant.
- (ii) Return the papers to you - now made into a file.

IMPORTANT

Avoid delays

NOTE:

The application must go to index without delay. Write up notes quickly. Don't leave the application lying around for notes that you may get around to writing up tomorrow.

Local procedures apply. In some offices you may make up the file

---

FINAL MESSAGE:

CARE MUST BE TAKEN THAT ALL APPLICATION AND INTERVIEW FORM QUESTIONS ARE ANSWERED AND THAT NO POINT IS LEFT UNRESOLVED PRIOR TO APPLICANTS DEPARTURE FROM THE OFFICE.

IMPORTANT:

HAVING TO CONTACT APPLICANT AGAIN UNNECESSARILY ANNOYS HER, WASTES YOUR TIME AND CREATES DELAYS IN DISPOSAL OF APPLICATIONS.

Before we go on to pre-grant verification and inquiry forms - the next page deals with what to do if an application is received via the mail.

# MAIL APPLICATIONS

The application should arrive on your desk via records with the Alpha Common Index already checked.

Requirements as for applications lodged in the office apply e.g. application form must be fully filled out etc.

## EXCEPT:

1. An interview may not be necessary - sufficient details may have accompanied the application.

If additional details are required use the phone or write a letter.

## BE CONSIDERATE

only in exceptional circumstances should applicant be requested to call at the office.

### Remember:

If necessary we can call on applicant.

2. These applications must be acknowledged by the issue of form S.W. 34C.

---

If application transferred from another district - issue form S.W. 747 to amend the district on the master record. Do not prepare this form until you are ready to grant the benefit.

### One problem with mail applications

The application form may not be fully completed - If so. Send a duplicate (typed copy of original) for applicant to complete and SIGN - Ensure - endorsed duplicate.  
If omissions minor - just clear up by letter.

Example of letter to accompany such an application:

"Your application for widows benefit was not fully completed. Enclosed is a duplicate of your application. Please complete the unanswered questions on this duplicate, sign the form, and return it to me in the stamped addressed envelope provided."

any other details should also be requested in this letter.

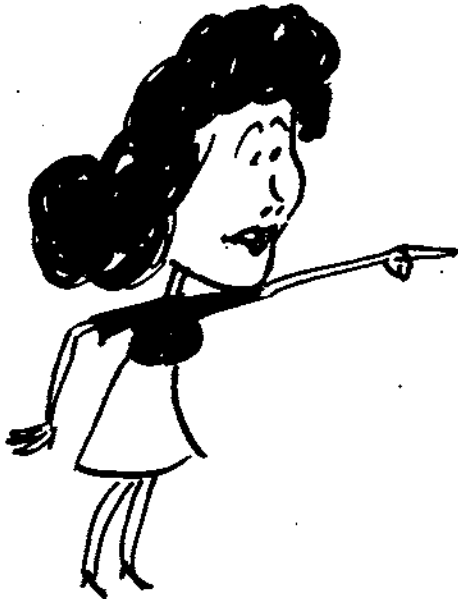
NOTE: If application NOT SIGNED - it can't be registered etc and must be returned - see para L.26(a) four weekly manual.





## APPLICATIONS

### A Final Reminder



1. Did you ensure ALL questions on the application form were answered?

2. What about the interview sheet! ALL sections completed?



3. Were ALL queries resolved prior to beneficiary's or applicant's departure from the office?

4. Did you attend promptly to cases of urgent need?

5. I hope you did not unnecessarily delay any of the callers!!

SELF TEST QUESTIONS

Do not write on this page

If you are not sure of the answer to any question read the Section again. You will find the answer there.

1. What are probably the two most important features when having the application form (W.B. 1) completed?
2. Should you refuse to accept an application where there is clearly no entitlement but the person insists on applying?
3. After having checked the application for completeness and signature what else should be done?
4. If the declared income is \$1,100.00 p.a. and applicant produces her bank passbook should you record details of the account?
5. If photocopying birth or marriage certificates, what must you remember to do?
6. At the time of a widows benefit application there are three other aspects that must be considered for which applications should be invited, if appropriate. What are they?

## ANSWERS

1. A. That ALL questions be answered.  
B. That the application form is signed.
2. No. If the applicant insists on applying we must accept the application despite the circumstances.
3. Ensure the application form is date stamped.
4. No don't waste your time. Perhaps just glance at the book. Income only requires verification if amounts of \$2548.00 and over are declared for applicants with no dependent children and \$3068.00 and over are declared for applicants with dependent children.
5. Certify the photocopy that it is a photocopy of the original.
6. A. Lump Sum Payment on Death or Accident Compensation.  
B. Accommodation Benefit.  
C. Telephone rental concession.

# STAGE TWO... PRE-GRANT VERIFICATION INCLUDING INQUIRY FORM ISSUE

Following on from the final step (page 37). You will now have the widows benefit file. (At this stage referred to as a claim.)

Inquiry forms must be issued without delay.

preferably on the same day the  
application is received.

Purpose of forms: To check certain details to enable application assessment and thus payment to applicant.

The issue of inquiries are  
recorded on this form (S.W. 42)

SCHEDULE OF INQUIRIES			
		Name	Date
		L. J. P. S. S. S.	11.12.54
1. The purpose of this form is to provide a summary of the inquiries made and the results thereof in a separate schedule form.			
Name of claimant: <u>L. J. P. S. S. S.</u>			
Address: <u>L. J. P. S. S. S.</u>			
No.	Description of inquiry	Date	Initials
1	Application submitted		
2	Application to H.M.		
3	App. Recd.		
4	App. Recd.		
5	App. Recd.		
6	App. Recd.		
7	App. Recd.		
8	App. Recd.		
9	App. Recd.		
10	App. Recd.		
11	App. Recd.		
12	App. Recd.		
13	App. Recd.		
14	App. Recd.		
15	App. Recd.		
16	App. Recd.		
17	App. Recd.		
18	App. Recd.		
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36	App. Recd.		
37	App. Recd.		
38	App. Recd.		
39	App. Recd.		
40	App. Recd.		
41	App. Recd.		
42	App. Recd.		
43	App. Recd.		
44	App. Recd.		
45	App. Recd.		
46	App. Recd.		
47	App. Recd.		
48	App. Recd.		
49	App. Recd.		
50	App. Recd.		
51	App. Recd.		
52	App. Recd.		
53	App. Recd.		
54	App. Recd.		
55	App. Recd.		
56	App. Recd.		
57	App. Recd.		
58	App. Recd.		
59	App. Recd.		
60	App. Recd.		
61	App. Recd.		
62	App. Recd.		
63	App. Recd.		
64	App. Recd.		
65	App. Recd.		
66	App. Recd.		
67	App. Recd.		
68	App. Recd.		
69	App. Recd.		
70	App. Recd.		
71	App. Recd.		
72	App. Recd.		
73	App. Recd.		
74	App. Recd.		
75	App. Recd.		
76	App. Recd.		
77	App. Recd.		
78	App. Recd.		
79	App. Recd.		
80	App. Recd.		
81	App. Recd.		
82	App. Recd.		
83	App. Recd.		
84	App. Recd.		
85	App. Recd.		
86	App. Recd.		
87	App. Recd.		
88	App. Recd.		
89	App. Recd.		
90	App. Recd.		
91	App. Recd.		
92	App. Recd.		
93	App. Recd.		
94	App. Recd.		
95	App. Recd.		
96	App. Recd.		
97	App. Recd.		
98	App. Recd.		
99	App. Recd.		
100	App. Recd.		

Completion is based on the application example  
(page 27).

Note:  
Date of despatch of forms and initials must always be shown.

Any reminders issued should also be recorded on this form - Again dont forget date and initials.

WHAT INQUIRIES AND FORMS ARE REQUIRED:

This depends on the amount of declared income and what was verified at time of application interview.

Based on the application example page 26 this is what would be required.

1. Notification to Common Index and Allocation of Benefit Number

1. After the application form is returned from local index prepare form SW 746 (Certificate of Registration of Social Security, War Pension, War Veterans Allowance or Overseas Pension application) in duplicate. This is an input form and must be signed by two officers unless your office has a system of responsibility position work allowing for one signature.

2. The original form SW 746 is referred to Pay Section for keying details of the application to the widows benefit master records and to the Widows Benefit master records and to the Common Index at the Data Processing Centre (see Page 107). The DPC will allocate the benefit number. The application and the duplicate SW 746 is retained on the division.

3. A new application list is received daily from the DPC. This lists all cases for which form SW 746 were keyed by Pay Section the previous day. The benefit number allocated for each application should then be entered on the application form.

NOTE: If the check of the Alpha Common Index shows there is already a master record reference (e.g. F/B) the same number is issued for the Widows Benefit application. Form SW 746 is still prepared and keyed but the number is shown on the form.

2. Birth and Marriage Certificates

If copies were taken at the interview.  
No verification forms required. See page 31.

If applicant unable to produce certificates, of birth or  
marriage in New Zealand.

Issue these forms to the Registrar  
of Births, Deaths and Marriages.

In some case may  
be on previous  
files.

Birth - Form S.W. 2A - To place where  
birth registered.

Marriage - Form S.W. 2B - To Registrar-  
General.

THIS VERIFICATION IS REQUIRED BEFORE GRANT

---

For problems in this area especially where applicant does not have a copy  
of the certificate see page 88.

3. Verification of death

- Benefit may be granted on secondary evidence  
like the newspaper notice, and actual  
verification followed up.
  - If applicant hasn't a death certificate -  
issue form S.W. 2C to the Registrar of  
Deaths etc in the district in which  
beneficiary's husband died.
- 

Examples of how to prepare the forms:

S.W. 2A

S.W. 2B

S.W. 2C

Examples of how to prepare the forms:

S.W. 2A

DEPARTMENT OF SOCIAL WELFARE  
VERIFICATION OF BIRTH ENTRY

1.8, 2A

County Office  
CHRYSTAL BLDG  
12000 WILLOWDALE RD  
WILLOWDALE, OHIO 44122

The Registrar of Births, JOHN J. HANCOCK }  
County Office }  
Name of Applicant } TERVIN SANCHEZ

Please attach copy of birth and marriage of the undersigned parent, and attach this form to one of separately in duplicate that constituting the certified copies, if the entry cannot be found, please forward the form to the Registrar-General by express mail.

Full Name TERVIN SANCHEZ  
Sex M  
Date of Birth 11/11/88  
Place of Birth CHINA  
Father's name (full name) STEFANO ANTONIO SANCHEZ  
Mother's name (full name) MARITZA BLANCA SANCHEZ  
Mother's maiden name GRUBBY

There is no record at this office, inquiry referred to Registrar-General.  Other Date Blank  I certify that the certificate copies above are correct as shown.

There is no record at this office.  Other Date Blank  I certify that the certificate copies above are correct as shown.

Certified Copy of Marriage Certificate signed or signed. John J. Hancock 12-10-91

S.W. 2B

DEPARTMENT OF SOCIAL WELFARE  
VERIFICATION OF MARRIAGE

1.8, 2B

County Office  
CHRYSTAL BLDG  
12000 WILLOWDALE RD  
WILLOWDALE, OHIO 44122

The Registrar-General, JOHN J. HANCOCK  
County Office

Name of Applicant TERVIN SANCHEZ

Please attach the certificate of marriage shown below and return the completed form to one of in duplicate, if the marriage has since been dissolved or annulled, give particulars.

Verification required (date received)  
Date of marriage 11/11/88  
Place of marriage ALABAMA  
Males (full name) STEFANO ANTONIO SANCHEZ  
Folio (full name) MARITZA BLANCA  
Males (name of place) SANTO DOMINGO  
Particulars of names (names or surnames) N/A

There is no record of the above marriage at this office.  I certify that the certificate copies above are correct as shown.  Other Date Blank  I certify that the certificate copies above are correct as shown.

If additional information or copy of parties necessary state requirements below.  
Certified Copy of Marriage Certificate signed or signed. John J. Hancock 12-10-91

S.W. 2C

DEPARTMENT OF SOCIAL WELFARE  
VERIFICATION OF DEATH

1.8, 2C

County Office  
CHRYSTAL BLDG  
12000 WILLOWDALE RD  
WILLOWDALE, OHIO 44122

The Registrar of Deaths, JOHN J. HANCOCK

Applique's name TERVIN SANCHEZ

Please attach the certificate of death shown below and return the completed form to one of in duplicate, if the entry cannot be found, please forward the form to the Registrar-General.

Full name of deceased TERVIN SANCHEZ  
Date of death 7-20-91  
Place of registration of death ALABAMA

Additional information requested or follow-up

There is no record at this office, inquiry referred to Registrar-General.  I certify that the certificate copies above are correct as shown.  Other Date Blank  I certify that the certificate copies above are correct as shown.

There is no record at this office.  I certify that the certificate copies above are correct as shown.  Other Date Blank  I certify that the certificate copies above are correct as shown.

Application Inquiries (Continued)

4. Verification of income

In our example the declared income was over \$3,068.00 p.a. and verification is therefore required.

IMPORTANT

DONT WASTE (FORMS OR) YOUR OR RECIPIENTS TIME BY VERIFYING INCOME WHERE THE TOTAL DECLARED IS UNDER \$3,068.00 PER ANNUM.

If in doubt as to the accuracy of declared income - discuss with a senior Officer.

Back to our example:

- (i) The bank account was verified when the application was taken by completing SW 265 and having it checked.
- (ii) Confirmation of the annuity was recorded on a minute sheet and checked. (Papers from the Solicitor were produced.)
- (iii) Form S.W.8 is required to check the earnings. There is an example of form SW 8 on page 49.

NOTES:

Also use S.W. 8 to check cessation date of earnings finishing just before benefit application or grant.

---

5. OTHER VERIFICATION REQUIRED:

Did you work out that in our example - The only form we have to wait for return of is the S.W. 8 - When returned the application is ready for the next stage termed Assessment See Page 52.

However there are two other points that must be checked before assessment:

- (i) CHILDRENS DETAILS:  
Confirmation required of:
  - Childs date of birth
  - Parentage
  - Record on the widows file.

Local arrangements apply in carrying out the check. VDU facilities may assist, but ensure parentage confirmed. If the VDU family benefit printout does not confirm parentage the permanent batch papers will do so.

- (ii) HUSBANDS ESTATE:  
Initial inquiry only required. See page 73 for full explanation.

Summary of verification next page.



# SUMMARY

At the time of pregrant verification

Remember the extent of verification depends on the particular case. Check this list. Will any of the forms etc be required?

FORM OR VERIFICATION	NOTES
S.W.34c (Acknowledgement of receipt of application)	Only issue if application received via the mail or from another office.
S.W.2A Verification of Birth S.W.2B Verification of Marriage S.W.2C Verification of Death	Issue if certificates not sighted at a office and can't be produced.
<u>Income inquiry forms:</u>	
S.W.5 Particular of account (to check on bank accounts)	These forms only required if declared income \$3,068.00 p.a. or more, (For our example) (Don't overlook form S.W. 205). and
S.W.8 Verification of earnings S.W.8A Sale of produce S.W.8B S.W. 8B Verification of Shares S.W.8C Verification of rent S.W.8D Verification of superannuation S.W.9 Verification of Mortgage S.W.222 Verification of Maori rents	verification has not been obtained at interview. Grant or assessment cannot proceed until forms returned.
S.W. 10 Transfer of Papers	S.W.125 Form Statement - should never be used <del>and</del> . Full accounts prepared by accountant <u>must be</u> produced in <u>every</u> case. (See revised Pt.M I & P Manual.
Family Benefit details - - local form?	To request file (except F.B.) domiciled in another district.
Husbands estate	From Family Benefit. paramount batch. VDU facilities may assist. But Don't overlook check on parentage.
	Special letter required.

On all forms ensure "Applic". shown by the widows number.

With the return of the necessary inquiry forms the application is now ready for assessment or sometimes called the grant action.

DEPARTMENT OF SOCIAL WELFARE



DISTRICT OFFICE: WELLINGTON  
Private Bag  
T.N. Ave.  
13.10.81

If telephoning or calling about this form please ask for Mr. Goldinger

The Wages Clerk,  
P.O. CLARENCE COX,  
Box 1, LAUREN QUAY

Reference No. W.B. APPLIC. A/289621

Full Name	Present Address
Applicant: <u>JENNER JONES</u>	<u>920 The Terrace Wellington</u>
Applicant's husband (wife)	

VERIFICATION OF EARNINGS

Dear Sir (or Madam),

As the above-mentioned person has made application for (or is in receipt of) a benefit, I should be obliged if you would supply particulars of earnings received by Mr (Mrs) Jones

Prompt return of this form is requested as any delay may cause inconvenience to the applicant. Addressed reply envelope is enclosed.

Yours faithfully,

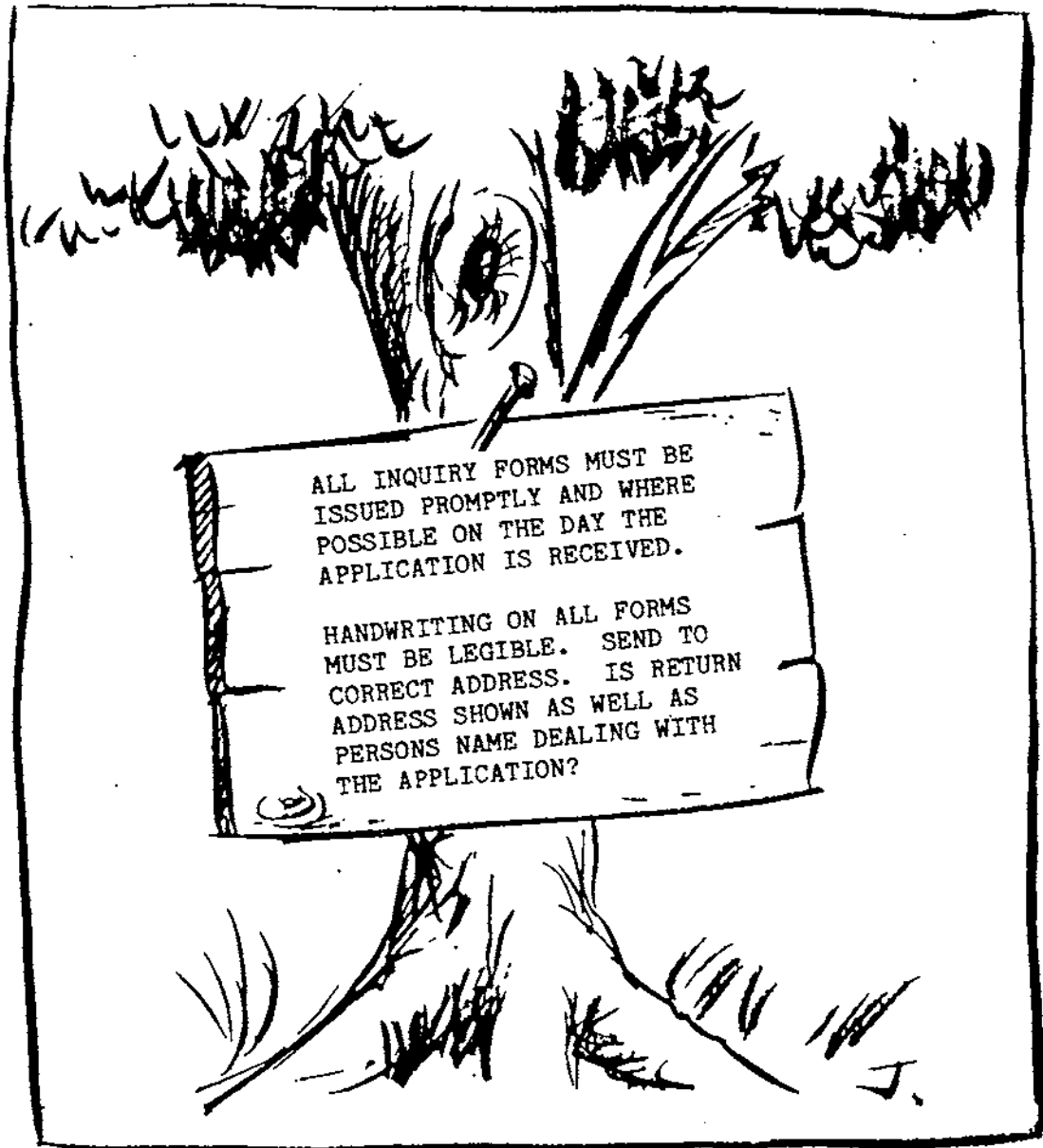
E. Outlaw Director.  
 District Agent.

QUESTIONS

ANSWERS

If working for a large organisation - show these details on the S.W. 8:

- Actual occupation
- Department or section employed in
- Period employed
- Other details that may assist in identification.



Outstanding applications must be checked at least weekly to ensure there is no delay in the return of inquiry forms.

Important message next page.

# FILING OF APPLICATIONS

APPLICATIONS THAT ARE NOT BEING WORKED ON SHOULD PREFERABLY BE STORED AWAY FROM THE DESKS AT A CENTRAL POINT IN ALPHABETICAL ORDER. THIS FACILITATES LOCATION OF FILES WHEN QUERIES ARE RECEIVED.

LOOSE PAPERS MUST BE MATCHED TO THE RELEVANT APPLICATION WITHOUT DELAY.

NOW WHERE'S  
THAT DARNED  
FILE?

LOOSE PAPERS ON HAND IN EXCESS OF ONE WEEK MUST BE REFERRED TO A SENIOR OFFICER.



The outstanding applications must be checked weekly to ensure there is no delay in both the return of forms or replies to other inquiries. After two weeks consider reminders, and note the S.W. 42 if they are issued.

# STAGE THREE...

## THE GRANT ACTION INCLUDING ARRANGING PAYMENT

### 1. ASSESSMENT (Granting the benefit)

This is working out of the date to start the benefit from and how much to pay.

Following on from page 48 the assessment can be carried out after necessary enquiries have been made, and forms returned.

#### How to do the assessment

You fill out form W.B. 2 - Certificate of disposal of application (see next page)

But first ensure all papers are in this order on the file:

File order: (from the back)

- Former papers if any
- W.B. 1 application form
- Interview sheet
- Death Certificate copy or newspaper notice etc.
- Birth Certificate copy or extract.
- Marriage Certificate copy or extract.
- Family benefit verification record.  
(Not just a print out)
- Income verification forms
- Copies of any letters sent.
- Replies to letters.
- S.W. 42 Action Sheet.

Example of completion of  
W.B. 2 next page.

Completing the certificate of disposal form:

The W.B. 2 below has been divided into sections:

Having regard to the application example page 27 we are going to on the next few pages discuss how to complete each section, and thus finish up by knowing:

- (i) What amount of widows benefit to pay.
- (ii) When to pay the widows benefit from.

DPA/IB/WB2

### CERTIFICATE OF DISPOSAL OF APPLICATION

Application received: 12/01/87

Class Code 080 4 1289621651

Benefit WIDOWS

Reservist 11  
Code

Full name JENNIE JONES

Address 920 The TERRACE WELLINGTON

Age 33 years by Birth Cert. Date of Birth 25/10/53

Residence ROAN - N.Z. years by NEVER PRESENT

Husband/Wife JOHN JONES

Address N/A

Married 01/01/73 Death/Dep./Divorce 07/01/87

Benefit No. N/A Rate \$ N/A

Dependent Children	Date of Birth	Liabilities Name
KRYSTLE	01-04-73	N/A
TADE	10-06-74	N/A
NORMAN	09-05-78	N/A
DAVID	28-02-80	N/A

Defendant's name: N/A

Date and place of order: \_\_\_\_\_

Non-chargeable income	Amount
<u>FAMILY BENEFIT</u>	<u>P.O.S.B. Account \$20,000.00</u>

Chargeable income	Appl.	Spouse	Income Assessment	Composition
<u>POSB Interest</u>	<u>2000.00</u>	<u>N/A</u>	Gross chargeable income - <u>\$5836.00</u>	Benefit rate - <u>\$9287.20</u>
<u>EARNINGS</u>	<u>3610.00</u>		Section 64 exemption	Less income deduction - <u>\$1485.20</u>
<u>Annuity</u>	<u>196.00</u>		Chargeable income - <u>\$3120.00</u>	Less maintenance - <u>\$7802.00</u>
			Exemption - <u>\$2716.00</u>	Plus earnings subsidy (18)
			Excess income - <u>\$2716.00</u>	Plus W.S.D. allowance
			Income deduction - <u>\$1485.20</u>	Benefit recommended - <u>\$7802.00</u>
<b>Total</b>	<b>\$5836.00</b>	<b>N/A</b>		

Overlapping benefit at \$ \_\_\_\_\_ p.w. from \_\_\_\_\_ to \_\_\_\_\_

Amount \$ \_\_\_\_\_ plus outstanding debt (if any) \$ \_\_\_\_\_

Appl. Code	Payment Code	Due Date	Amount
		<u>11</u>	<u>5</u>
		<u>11</u>	<u>5</u>
		<u>11</u>	<u>5</u>

Payee \_\_\_\_\_

Address \_\_\_\_\_

Serial No \_\_\_\_\_

Account Number \_\_\_\_\_

Continuing Payment

Payment order 11

Bank credit \_\_\_\_\_

Decision

Benefit granted/refused: \$7802.00 p.a. later taking excess income into account from 1/88 @ Family Support Payout @ \$4367.00 p.a. (\$976.00)

M.O. Decker  
20.01.87

Check List
S.W. 110
D.P.B. 12
Not used
Apple Rep.
Index
S.W. 45 m
Chart
Maintenance (if not)
Beneficial
Defendant
Follow up action

Before you complete the form W.B. 2 arm yourself with the following:

1. S.W. 396 - Pay Period chart.
2. S.W. 313 - Input form code chart.
3. S.W. 40 - Income exemption assessment table.
4. A calendar.
5. An electronic calculator.

①

DPB/IB/WE2

# CERTIFICATE OF DISPOSAL OF APPLICATION

Application received: 12/01/87

..... WIDOWS ..... Benefit

Class Code	030	4	1289621451
------------	-----	---	------------

Full name: Jennie JONES

Renewal

Address: 990 The TERRACE WELLINGTON

11
Code

**ENSURE:**

Name: Show full name  
Distinguish surname

This is the benefit code for the computer purposes.

Address: Full address to which mail to be sent.

If changed before grant up date panel.

Important:

Show correct number obtain from new applications list produced by DPC.

This is worked out after completing the decision panel (Section 12)

②

Age.....	33	years by	Birth Cert	Date of Birth:	25/10/53
Residence.....	BORN - N. 2 - NEVER		years by	Absent	
Husband/Wife.....	JOHN JONES				
Address.....	N/A				
Married.....	01/01/73	Death/Sep./Divorce	07/01/87		
Benefit No.....	N/A		Rate \$.....	N/A	

These details: Copy from the certificate extracts.

Residence: Only an issue if needed to determine entitlement see page 9.

Benefit No: not applicable to widows benefit.

③

Dependent Children	Date of Birth	Liablr Parent's Name
KRYSTLE	01-04-73	N/A
JADE	10-06-76	N/A
NORMAN	02-07-78	N/A
DAVID	29-02-80	N/A

Copy details from the verification you have on the file - checkout any discrepancies from the application form.

This section does not apply to widows benefit.

④

Maintenance			
Defendant's name:	N/A		
Date and place of order:			



Non-chargeable Income	Assets
Family BENEFIT (5)	P.O.S.B. ACCOUNT \$20,000.00

Record here non-chargeable income. Family benefit is the most common. Other income of this type may include handicapped child's allowance, War disability pension etc. If in doubt check with the income and property manual.

Enter here details of any cash assets or other assets that produce income.

Chargeable Income	Appt.	Spouse
POSB Interest	2000.00	n/a
EARNINGS	3640.00	n/a
ANNUITY	196.00	n/a
(6)	Total	\$5836.00

With the exception of these income types mentioned above any income applicant has is required to be charged against the benefit. If the annual income exceeds \$3,120.00 the benefit is paid at a reduced rate.

At grant prospective income is charged. This is the income applicant is expected to receive in the next 12 months. For full explanation see page 127.

Convert income to the prospective annual rate and enter here.

Watch: dont charge income that is to cease before grant.

Having regard to the application example page 27 can you understand the income assessment principle so far. The same principles apply to any other types of chargeable income declared.

This is the total figure from section 6 previous page.

Rarely applies to widows benefit. Some sick benefit payments attract an additional \$104.00 p.a. exemption. Part W Weekly Manual has details.

7

Income Assessment	
Gross chargeable income ..	\$5836.00
Section 66 exemption	.....
Chargeable income ..	\$5836.00
Exemption ..	\$3120.00
Excess income	\$2716.00
Income deduction	\$1485.20

Remember - does the widow have dependent children. The income exemption will be \$2,600.00 p.a. (no children) or \$3,120.00 p.a. (with dependent children). Deduct from the chargeable income. If answer = NIL full benefit is payable.

Obtain this figure by using income deduction chart page 131. The chart is simple to use.

Working out the amount payable

8 Computation

Benefit rate..	\$9287.20
Less income deduction	\$1485.20
Less maintenance	.....
	\$7802.00
Plus earnings subsidy (IB)	.....
Plus W.S.D. allowance	.....
Benefit recommended	\$7802.00
Prepared by .....	
Check by .....	

Assess amount payable taking into account whether there are dependent children and adding Family Support after.

The last figure in section 7 above.

Subtract

- and this is the amount benefit payable.

Your signature.

The person that checks your work signs here.

9 Overlapping ..... benefit at \$..... p.w. from ...../...../..... to ...../...../..... Amount \$..... plus outstanding debt (if any) \$.....

Enter here in red ink any amounts such as service to widows, or special needs grant payments etc that are required to be recovered. Recovery is usually from the first instalment.

- NOTE:**
- (i) If late husband's National Superannuation included payment in respect of the widow - take caution. Her overlapping element of the National Superannuation may require deduction. However, any adjustment is usually made with the final payment of National Superannuation in terms of section 61DB of Social Security Act 1964.
  - (ii) See also Paragraph D.83B, four weekly manual, where widow was included in husbands benefit.

Any arrears due to the beneficiary i.e. payment from the date of grant until the first credit can be made to a bank account should be paid by daily direct credit (SW 55) - See page 63.

You must show how you arrive at the amount of the first payment. Set out the assessment on the reverse of the W.B. 2.

10	Arrears 07.01.87 to 13.01.87	7/14 \$300.08 = \$150.04
	Due date 20.01.87	<u>\$300.08</u>
	Total DD 20.01.87	
		\$450.12

This assessment should be self-explanatory.

This is where you use:

- the S.W. 396 pay period chart.
- a calendar.
- and useful for accuracy and saving time is an electronic calculator.

**GRANT DATE**



1. ASSESSING THE FORTNIGHTLY RATE:



## THE CHECK RATE

This is the fortnightly rate and must be shown on most input forms.

But to be acceptable to the computer it has to be assessed this way:

- Divide annual rate of benefit by 52.
- Round off to cent above and double.

One Exception:

Where the third decimal place in the cents = 0 just double the first two figures.

Examples:

Annual rate:

$$\$3735-46 \div 52 = 71.83 \mid 5769 = \$143-68.$$

$$\$3871-44 \div 52 = 74.45 \mid 0769 = \$148-90.$$



Include - Accommodation Benefit

Exclude - F.O.P. amounts.

Final completion W.B. 2 next page.

Continuing Payment	
Payment order Bank credit.	03 / 02/87 \$300.08
48018, -20,000/1/86MK	

This is the fortnightly rate determined by the principles outlined on the previous page.

Check List	
SW 310	.....
<del>SW 54</del>	.....
Notified	.....
Appln Reg	.....
Index	.....
SW 65	.....
Defendant advised	.....
Stats	.....
Follow up action	.....
ESTATE AT	.....
FIRST RENEWAL	.....
14	.....
FILE	.....
29-01-87	.....

After completing the input form and notification - initial here.

See pages 63 and 65.

(Application register no longer maintained).

Does not apply to widows benefits

Any follow up required record here in our example the estate has not yet been finalised - This will be checked out at first renewal.

Once all actions are complete a Senior Officer will initial here, and the file can then be put away in the current series.

**IMPORTANT:**

1. No file is to be placed in the current series unless the top paper shows "FILE" and there is also an initial.

2. **WATCH**

Don't overlook miscellaneous applications like phone concessions, accommodation benefit etc. These are explained later.

Test yourself - see next page.

Below is the W.B.2 from the previous page completed and in intact form.

Can you remember and understand how and why each section was completed?

If not go back and read pages 52-61 again.

DPA/12/1982

### CERTIFICATE OF DISPOSAL OF APPLICATION

Application received: 12/01/87

Benefit: WIDOWS Case No: 020 4 1289621651

Full name: JENNIE JONES Removal Code: 11

Address: 920 THE TERRACE WELLINGTON

Age: 23 years by Birth Cert. Date of Birth: 25/10/53

Residence: Born - N.Z. - years by NEVER PRESENT

Married: 01/01/73 Death/Div./Dissolved: 07/01/87

Benefit No. N/A Rate: N/A

Dependent's Name	Date of Birth	Living Parent's Name
KRISTLE	01-04-73	N/A
JADE	10-06-73	N/A
NORMAN	02-05-78	N/A
DAVID	28-02-80	N/A

Defendant's name: N/A

Date and place of order: \_\_\_\_\_

Has chargeable income: FAMILY BENEFIT Amount: P.O.S.B. Account \$39,000.00

Chargeable Income	Appt.	Spouse	Income Amount	Computation
POSB Interest	2000.00	N/A	Gross chargeable income - \$5836.00	Benefit rate - \$7802.20
EARNINGS	3640.00		Section 64 exemption -	Less income deduction - \$1485.20
Annuity	196.00		Chargeable income -	Less maintenance - N/A
			Exemption - \$3120.00	Final earnings liability (25) -
			Excess income - \$2716.00	Final W.S.D. allowance -
			Income deduction - \$1485.20	Benefit recommended - \$7802.00
<b>Total</b>	<b>\$5836.00</b>	<b>N/A</b>		

Overlapping benefit at \$ \_\_\_\_\_ p.w. from \_\_\_\_\_ to \_\_\_\_\_

Amount \$ \_\_\_\_\_ plus outstanding debt (if any) \$ \_\_\_\_\_

Interim Payment Order				Decision		Check List	
App. Code	Payment Code	Due Date	Amount	Benefit granted/refused:		S.W. 310	S.W. 45 to:
		1/1	\$	\$7802.00 p.a. later taking excess income into account from 1/1 Family Support payable @ \$1367.00 p.a. (\$7802.00)		D.F.P. 12	Over:
		1/1	\$			Maintenence Officer:	
		1/1	\$			Beneficiary:	
Serial No. _____				M.O. Date: _____		Follow up action:	
Account Number _____				20.01.88		File: _____	
Continuing Payment							
Payment order Bank credit: _____							

Keeping in mind our application example page 27, there are four more things to do before the grant action is complete.

- (i) Get the money to beneficiary - involves input form completion (next page).
- (ii) Tell beneficiary of the grant - by letter (page 65).
- (iii) Attach certificate of entitlement (page 66).
- (iv) Tell family section of the grant if child supplement payable (local procedures apply).



INPUT FORM COMPLETION

Before you go any further - read pages 107-109.

Now after reading that section on input forms you should be able to understand the completion of these input form which are related to our application example page 27 and the W.B. 2 that has just been completed.

SW 55

**DIRECT CREDIT — PAYMENT REQUEST**

---

Class Code	Serial Welfare Number	Adept															
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Bank                      Branch																											
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A. INEUBRAIN		20.01.87		D. CROCKETT		20.01.87
Prepared By		Date		Checked By		Date

PAY SECTION		Date	
-------------	--	------	--

11941R - 70,000parts 2 BANK



TELLING BENEFICIARY THE BENEFIT HAS BEEN GRANTED

(Sending the notification or letter)

The letter writing principles set out on page 110 also apply here.

---

1. Benefit granted at FULL RATE

Issue letter based on form S.W. 3A.

# THE GRANT LETTER

2. Benefit granted at REDUCED RATE

The letter must show the benefit assessment. A suggested format is on the next page:

NOTE: If not already attended to:

If apparent entitlement, attach Accommodation Benefit and Phone Concession applications.

Note SW 42 of issue - no need to follow up.

Benefit declined - See page 68.

81P/810F

Mrs Jennie Jones  
920 The Terrace  
Wellington

Dear Mrs Jones

WIDOWS BENEFIT 428962178

You have been granted a Widows Benefit of \$7802.00 per annum (\$300.08 fortnightly) from 07.01.87.

The assessment of your benefit is as follows:

P O S B Interest	\$2000.00	Maximum Benefit	\$9287.20 PA
Your Earningsd (converted to annual rate)	\$3640.00	Less deduction on account of excess income	<u>\$1485.20</u>
Annuity	<u>\$ 196.00</u>		
Total	\$5836.00	Benefit payable	\$7902.00
Less Income Exemption	<u>\$3120.00</u>		= \$ 300.08
Excess	\$2716.00		(fortnightly)
Deducton on Account of excess income	\$1485.20		

Payment for the period 07.01.87 to 27.01.87 amounting to \$450.12 will be credited to your POSB account on 20.01.87.

From due date 03.02.87 and each two weeks thereafter payments of \$300.08 will be credited to your account.

Please let this office know should you or your children:

- move from the above address
- commence employment
- receive any further income
- be admitted to hospital
- leave New Zealand for more than 26 weeks
- leave school
- enter into a relationship like a marriage
- change your material or financial circumstances in any other way.

Your benefit is required to be reviewed each year and forms for this purpose will be dispatched in sufficient time to avoid interruption in payment.

If you are dissatisfied with the decision above you are entitled to have the decision reviewed by the Social Security Commission. If you wish to have the decision reviewed you should apply in writing within three months, setting out briefly the grounds on which you object to the decision. A form for this purpose is available from any office of this Department. (SW 143 - Application for Review of Decision.)

Also, this office will be happy to assist with any queries you may have.

Yours faithfully,

for Director

# CERTIFICATES OF ENTITLEMENT

Reference: CM 1981/67  
CM 1986/194  
CM 1985/68

1. These must be issued with every new grant.
2. Attach to the grant letter.
3. The certificate is in card form and is numbered S.W. 376. (local issue) or SW377 when issued by DPC.
4. The certificate entitles beneficiaries to:
  - Reduced Doctors fees (at the discretion of the Doctor)  
(termed higher rate of medical benefit).

And also exemption from the charge on prescriptions.

5. Show expiry date. Certificates are issued for 12 months and expire on the 30th September each year.
6. The S.W. 376 is a dual purpose form - For widows benefit the front of the certificate must say:

"THE HIGHER RATE OF MEDICAL BENEFIT. AND IS EXEMPTED FROM THE CHARGE FOR PRESCRIPTIONS."

7. NOTE: If payment is made to an agent the certificate must be issued direct to beneficiary.

\*\*\*\*\*

**DECLINED APPLICATION**

# APPLICATION DECLINED

1. Most widows benefit applications are granted - i.e.: meet the qualifications and are, thus, paid the benefit.
2. So an application is declined where one or more of the statutory qualifications (see page 8) are not fulfilled or if applicants income does not even permit payment of a reduced benefit.

This latter situation is the most common reason for refusing or declining the application.

3. The decision to decline will be given by a Senior Officer. Your job will then be to:
  - A. Complete W.B. 2 - show reason for decline.
  - B. Complete input form - S.W. 273 (Tick 105).
  - C. Notification - see next page.

## POINTS TO NOTE



### Income:

1. If benefit declined on account of income - that income taken into account must be verified, and the assessment shown to beneficiary in writing.
2. Decline letters always to include:
  - Reason for decline - quote relevant section of Act.
  - Review rights.

### See Example Next Page

3. Reason - If you can't find the statutory authority for the refusal of payment - reconsider the decision to decline.

### Withdrawal:

4. If applicant wishes to withdraw her application - this should be obtained in writing.

# DECLINE LETTER

Mrs Agatha Dunit,  
209 Trendy Place,  
WANAKA.

Dear Mrs Dunit,

Widows Benefit Application 378921265

Your application for widows benefit has been carefully considered.

Section 24 of the Social Security Act 1964 states that the rate of widows benefit shall be that as prescribed by the third schedule of the Act.

The schedule provides that a widows benefit of \$6820.32 p.a. may be paid to a person without dependent children. However this amount is diminished by 30 cents for every complete \$1.00 of the total annual income of the widow in excess of \$2,600.00 a year, and by 70 cents for every complete \$1.00 of her total annual income in excess of \$4,160.00 p.a.

In taking into account your income and applying the above abatement provision it has been necessary to assess your benefit as follows:

<u>Income</u>		<u>Benefit</u>	
Earnings	\$13525.00	Maximum benefit	\$6820.32
Bank interest	\$ <u>24.80</u>		
Total chargeable income	\$13549.00	Less deduction	
Less exemption	\$ 2600.00	on account of	
Excess	\$10949.00	excess income	<u>\$7040.30</u>
Deduction on account			
excess income	\$ 7040.30	Benefit payable =	NIL

As you can see it is not possible to pay you a widows benefit, and thus your application has been declined.

If you are dissatisfied with the decision above, you are entitled to have the decision reviewed by the Social Security Commission.

If you wish to have the decision reviewed, you should apply in writing, within three months, setting out briefly the grounds on which you object to the decision. A form for this purpose is available from any office of this department (S.W. 143 - Application for Review of Decision).

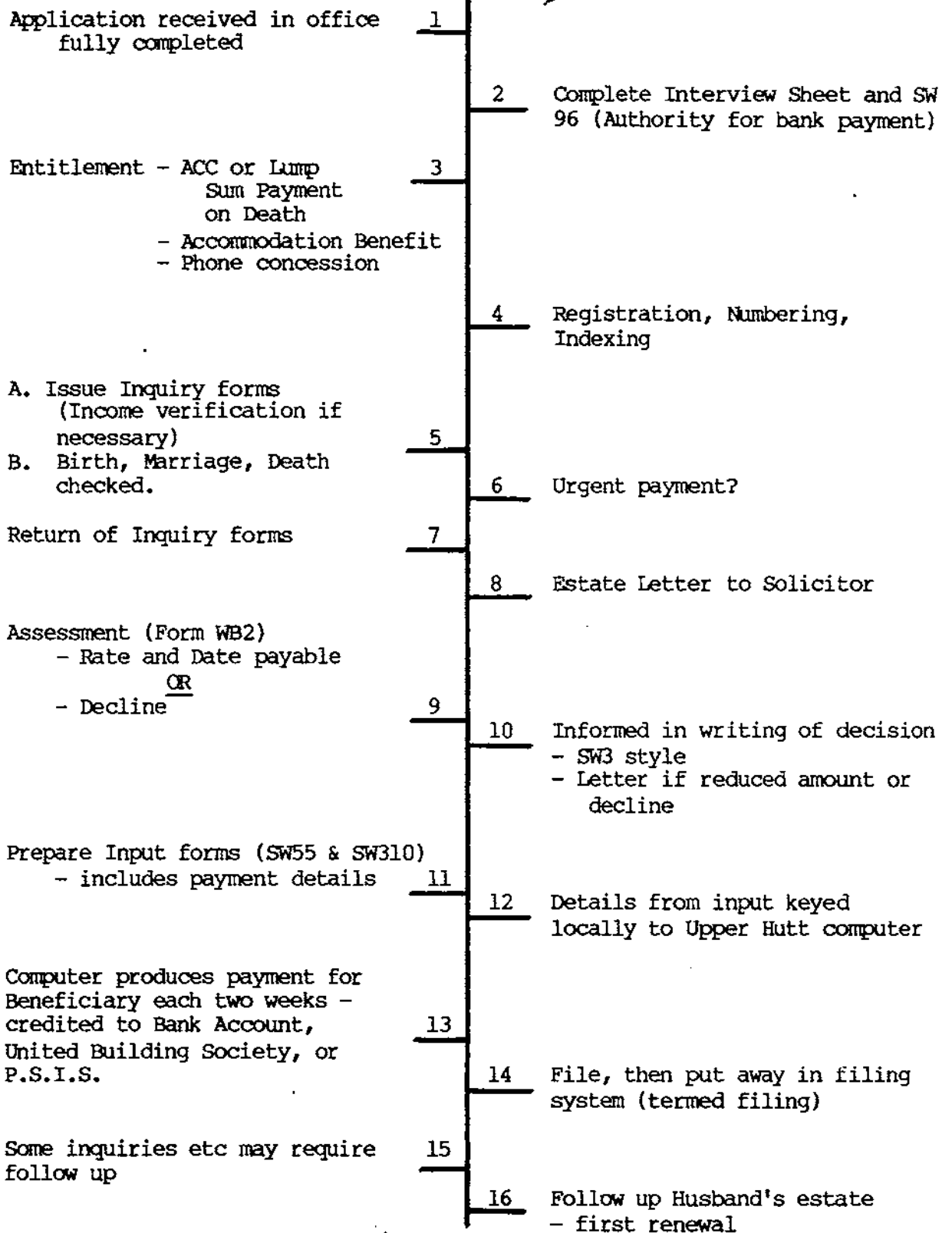
Yours faithfully,

NOTE: The above letter although lengthy has been written with the intention of supplying the applicant with all the information relevant to her application being declined. This should save the applicant from having to make further enquiries to the office.



APPLICATION FOR WIDOWS BENEFIT RECEIVED IN THE OFFICE

Summary of steps that must be covered



SELF-TEST QUESTIONS

Do not write on this page

If you are not sure of the answer to any question read the Section again. You will find the answer there.

1. What additional details may have to be shown on form S.W. 8?
2. What is the ideal way to file applications awaiting return of inquiry forms?
3. What is the amount of income that may affect the amount of widows benefit payable?
4. Give three examples of non-chargeable income?
5. What date do you grant widows benefit from?
6. What information must be shown in a letter for a declined application?

ANSWERS

1. Applicants or beneficiary's actual occupation, and section working in when employed by a large organisation.
2. Away from the desks in alphabetical order.
3. \$2,600 or \$3,120 per annum.
4. A. Family Benefit.  
B. Handicapped Childs Allowance.  
C. War Disability Pension.

etc. (see page 120).

5. The day following the date of the husbands death. Providing application lodged within six months after the date of death.
6. (a) A clear explanation of why the application has been declined including the section of the act used as the authority.  
(b) Review provisions explained.

**HUSBANDS ESTATE**

# HUSBANDS ESTATE

Reference: Part L Income  
& Property  
Manual

## WHAT IS AN ESTATE?

It is the cash and other assets such as shares bank accounts, life assurance proceeds etc belonging to beneficiaries late husband.

In most instances all these assets pass on to beneficiary, but before they do any liabilities (funeral expenses, outstanding accounts) of the husband need to be deducted.

Following the husbands death the Public Trust Office or a Solicitor will arrange for the estate assets to be transferred to beneficiary. This legal activity can take any time from 6 to 12 months to finalise.

---

## WHAT EFFECT DOES THE ESTATE HAVE ON WIDOWS BENEFIT?

Distribution to beneficiary of the assets of the estate is a capital payment.

- prospective proceeds from any investment of these assets is chargeable as income against the benefit (see income section page 118).

In most instances such income does not even with beneficiary's other income reach the income exemption - so little action is required.

- WATCH - 1. Occasionally an interim distribution (payment) from the estate may constitute income - this must be treated as chargeable income.
2. Look at charging prospectively income which is ascertainable with a degree of certainty (discuss with senior officer)

## WHAT DATE TO BRING THE ESTATE PROCEEDS OR INCOME TO CHARGE

No hard and fast rule can be laid down. - A senior officer must decide. It depends on the nature of the estate the extent or type of assets etc) and the method of distribution.

- Generally benefit would be reviewed if necessary from the 1st available date following distribution to beneficiary.

---

## PROCEDURE

1. At time of application obtain name of solicitor and name and address of his firm handling the estate.
2. At time of application inquiry issue letter to solicitor - See suggested format next page. - Form S.W. 13 is not to be issued.
3. Beneficiary to be asked in writing (combine with grant letter) to inform office if any distribution of estate made prior to renewal.
4. No need for bring up etc.

See next page  
for follow up procedure.

Suggested letter to be sent to Solicitor or Public Trust Office prior to benefit grant.

WIDOWS BENEFIT APPLICATION \*/

ESTATE OF .....

Mrs. has lodged an application for widows benefit and states you are administering the estate of her late husband who died at Wellington on

So I may determine Mrs. entitlement for widows benefit please let me know the following:

A. Details of the estates assets including: (If Possible)

- (i) Nature and amount of any investment;
- (ii) Name and address of organisation holding the investment;
- (iii) the interest or dividends etc being paid on each investment.

B. The estates liabilities.

C. The extent of Mrs. or her children's interest in the estate. If Mrs. is not the sole beneficiary please forward a copy of the will.

D. If has received any payments from the estate what did they represent, and the date and amount of payment.

E. Details of any continuing payments.

F. When is the estate expected to be finalised.

If full details of the estate are not yet known, an interim reply as to what information is available would be appreciated.

Please also let me know when final distribution of the estate is made.

.....  
for Director.

FOLLOWING UP FINALISATION OF THE ESTATE:

1. Unless contact made by solicitor or beneficiary advises of some distribution THERE IS TO BE NO ACTION UNTIL FIRST RENEWAL. However most estates are finalised by this time.
2. If estate not finalised at 1st renewal write to Solicitor to determine progress and ask when distribution may be expected.

Also check ---

Has there been an interim distribution.

Remember:

Before bringing any estate proceeds to charge distinguish between income and capital payments and watch prospective income from the cash assets.

**LUMP SUM PAYMENT**

# LUMP SUM PAYMENT AFTER DEATH

## References:

- Section 61D Social Security Act
- Part B Miscellaneous Provisions Manual

NOTE: This section is not a detailed outline of Lump Sum Payment After Death provisions. Qualifications and procedures etc covered are only those relevant to widows benefit applications.

## When to take an Application: (Relation to widows benefit)

1. If applicant's husband dies leaving a spouse and/or children and death was not the result of an accident and the net value of assets of the spouse and/or children's share in the deceased's estate is less than \$10,000 the following provisions apply:
  - (a) If the widow has no dependent children and her annual income is such that it would not prevent payment of a widows benefit, she could be paid a lump sum of up to \$1,200.
  - (b) If the widow has dependent children, provided she qualifies as in (a) the children would qualify for \$600 each.
  - (c) If the husband was in receipt of a benefit or national superannuation and a lump sum payment of this benefit has been made under Section 61DB of the Act this sum is deducted from the \$1,200 mentioned in (a).
2. The application form (S.W. 231) should be filled in at the time the widows benefit application is taken.
3. If husbands death was as a result of an accident the equivalent lump sum is available via Accident Compensation. Refer applicant to the State Insurance or Accident Compensation Office.

---

## How is it Paid

A cheque via the Treasury payment system is posted to beneficiary. This includes payment for herself and her child/children if appropriate.

---

continued next page





## LUMP SUM PAYMENT AFTER DEATH

### POINTS TO NOTE

#### 1. DEPENDENCY

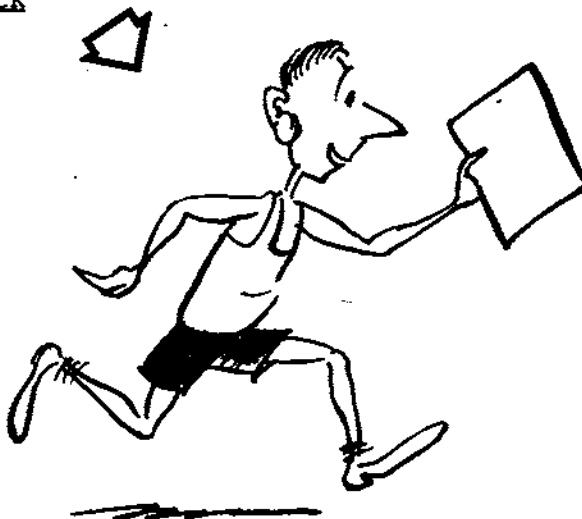
This is one of the qualifications. However it is presumed that wife is dependent on husband if living together at the time of death.

#### 2. ASSETS AND INCOME

The net value of assets in the deceased's estate must not exceed \$10,000. "Assets" does not include the family home and chattels, household tools, car, pets or undivided beneficial freehold interest in Maori freehold land.

The income of the applicant must be such that she would still qualify for a widow's benefit.

#### 3. BE QUICK



Action Lump Sum Payment After Death applications WITHOUT DELAY. The receipt of the lump sum can be of great assistance to the widow by helping relieve financial worry at a time of grief.

#### 4. SUMMARY OF PROCEDURE

- A. Application S.W. 231
- B. Birth, death Marriage Certs.
- C. Register etc & S.W. 6.
- D. Childrens details
- E. Action sheet S.W. 232.
- F. Letters
- G. Treasury voucher
- H. Separate file

Examples next page.

**EXAMPLE OF ACTION SHEET**

SW 232

**Certificate of Disposal of Application for Lump Sum Payment After Death**  
(Section 61DC Social Security Act)

Name of Deceased:..... Number:.....

Date Application Received:..... Date of Birth of Deceased:..... Date of Death:.....

1. Name of Applicant:.....

2. Address:.....

**B** 3. Relationship of applicant to deceased:.....

**L** 4. Was the spouse living with the deceased at the date of death? YES/NO

**O** 5. If the applicant is not the legal spouse do the provisions of Section 63(b) of YES/NO  
the Social Security Act apply?

**C** 6. Not entitled to Accident Compensation? YES/NO

**K** 7. Children:

(a) Name	(d) Date of Birth	(c) Living with deceased at D.O.D.
.....	.....	YES/NO
.....	.....	YES/NO
.....	.....	YES/NO
.....	.....	YES/NO

**BLOCK TWO Income of Applicant**

1. Limit of benefit and income \$

2. Income of applicant and/or children \$

3. Income of applicant and/or children is less than the limit of income and benefit? YES/NO

**BLOCK THREE Assets of Applicant**

1. Assets limit \$10,000

2. Net value of spouse and children's share of assets in deceased's estate (excluding assets listed in Section 61D(2) of the Social Security Act). \$

3. Net value of assets is less than \$10,000? YES/NO

Note 1: If the answer to any of the questions in blocks one, two or three is NO there is no entitlement to a lump sum under Section 61DC.

Note 2: Where there is a surviving spouse and the answer to questions 4 and 5 in block one and question 3 in blocks two and three is YES there is entitlement to:  
(a) \$1,200 in respect of the spouse less any payment made under section 61DB; and  
(b) \$600 in respect of each child who was living with the deceased.

Note 3: Where the deceased was a solo parent and the answer to question 3 in blocks two and three is YES there is entitlement to:  
(a) \$1,200 less any payment made under section 61DB; and  
(b) \$600 in respect of each child and was living with the deceased.

**Recommendation and Decisions.**

1. Payment of a lump sum of \$..... is approved in terms of Section 61DC. (See reverse for assessment)

Payee:.....

Address:.....

2. Pay \$..... to the ..... in trust for the following dependent children and in the following amounts:

Child	Date of Birth	Guardian	Amount
.....	.....	.....	.....
.....	.....	.....	.....
.....	.....	.....	.....

3. Application refused because:.....

Letter issued setting out income assessment and reasons

.....  
Recommending Officer for Director

Vouchers passed for 1 and 2 above-Schedule No.....  
.....  
Certifying Officer

Application register noted .....  
.....  
File:.....

See next page for example of letters

1. LETTER TO APPLICANT WITH DEPENDENT CHILDREN

"Your application for a lump sum payment arising from the death of \_\_\_\_\_ has been considered and a grant of \$\_\_\_\_\_ approved.

The provisions of the Social Security Act relating to lump sum payments, require that the sum available be reduced by the amount of any benefit continued in respect of the deceased, beyond the date of death.

The payment approved in your case is assessed as follows:-

	\$
Payment in respect of yourself	1,200
Less Benefit Continued Beyond Date of Death	_____
Balance Payable	
Plus Payment for the Child	_____
" " " " "	_____
" " " " "	_____
" " " " "	_____
TOTAL PAYABLE	_____

Payment in respect of the child/children is paid to you in trust for the children.

Arrangements are being made to pay the amount assessed, and you should receive a cheque through the mail in due course.

If you are dissatisfied with the decision above, you are entitled to have the decision reviewed by the Social Security Commission.

If you wish to have the decision reviewed, you should apply in writing, within 3 months, setting out briefly the grounds on which you object to the decision. A form for this purpose is available from any office of this Department (SW 143 - Application for Review of Decision)."

2. LETTER TO APPLICANT WITH NO SURVIVING CHILDREN

"Your application for a lump sum payment arising from the death of \_\_\_\_\_ has been considered, and a grant of \$ \_\_\_\_\_ approved.

The provisions of the Social Security Act 1964, relating to lump sum payments, require that the sum available be reduced by the amount of any benefit continued in respect of the deceased, beyond the date of death.

The payment approved in your case is assessed as follows:-

Payment in respect of yourself	\$1,000
Less benefit continued beyond date of death	_____
Balance Payable	_____

Arrangements are now being made to pay the amount assessed, and you should receive a cheque through the mail in due course.

If you are dissatisfied with the decision above, you are entitled to have the decision reviewed by the Social Security Commission.

If you wish to have the decision reviewed, you should apply in writing, within 3 months, setting out briefly the grounds on which you object to the decision. A form for this purpose is available from any office of this Department (SW 143 - Application for Review of Decision)."

3. LETTER TO NON-BENEFICIARY WITH DEPENDENT CHILDREN

"Your application for a lump sum payment arising from the death of \_\_\_\_\_ has been considered and a grant of \$\_\_\_\_\_ approved.

Of this amount, \$\_\_\_\_\_ is in respect of the child/children

---

(show children's names)

and is paid to you in trust for the child/children.

Arrangements are now being made to pay the amount due and you should receive a cheque in due course.

If you are dissatisfied with the decision above, you are entitled to have the decision reviewed by the Social Security Commission.

If you wish to have the decision reviewed, you should apply in writing, within 3 months, setting out briefly the grounds on which you object to the decision. A form for this purpose is available from any office of this Department (SW 143 - Application for Review of Decision).

NOTE: If no children second paragraph should be omitted."

**ACCIDENT COMPENSATION**

# ACCIDENT COMPENSATION

References: Section 71A Social Security Act

V68 Income and Property Manual

## INTRODUCTION:

If beneficiary's husband's death is a result of an accident she will most likely be entitled to accident compensation payments.

## WHAT IS ACCIDENT COMPENSATION?

It is government assistance (cash payments) available to accident victims or their dependents.

## WHO PAYS IT?

Payments are authorised by an organisation similar to a Government Department -- The Accident Compensation Corporation. In some districts the corporation engages the State Insurance Office to handle claims and pay the compensation.

## TYPES OF ACCIDENT COMPENSATION AND THEIR EFFECT ON WIDOWS BENEFIT

### 1. Earnings Related

- (Assessment on basis of late husbands wage)

The net amount is a DIRECT DEDUCTION from Widows Benefit.

See next page for procedure

### 2. Lump sum

\$1000.00 payable to widow following husbands fatal accident and in addition up to \$1,500 paid in respect of dependent children.

Regarded as capital payments - any proceeds from investment of the money is treated as chargeable income.

### 3. As a result of accident to beneficiary herself

Not a direct deduction. Charge as income in the same way as earnings. Lump sums are regarded as capital payments. Again any proceeds from the investment of the money is treated as chargeable income.

Procedure (No1) next page



Entitlement to late husbands earnings related compensation ---

PROCEDURE

1. Must apply

If Widows benefit application lodged and there appears to be entitlement (husband met death by accident) to accident compensation\* - beneficiary must lodge an application for compensation.

(\* Possible entitlement to 80% of late husbands wage by way of compensation)

2. Local arrangements apply

In some districts accident compensation as above is paid without delay. If the rate exceeds the widows benefit rate (remember it operates as a direct deduction) don't grant the widows benefit. Check on the accident compensation amount and consider for decline.

IF THERE IS ANY DELAY IN PAYING ACCIDENT COMPENSATION WE MUST PAY THE WIDOWS BENEFIT AND DEDUCT THE COMPENSATION LATER ----

PROCEDURE HERE IS:

1. After grant of widows benefit send this letter to the local State Insurance office (or ACC office).

"The abovenamed has been granted widows benefit of \$357.20 per 2 weeks from 16.10.\*\* and has stated she has applied for accident compensation in respect of her late husband.

Please note that if earnings related compensation is granted the Department in accordance with sub section 134(3) of the Accident Compensation Act 1972 will require a refund from the compensation of all or part of the widows benefit paid.

Please let this office know of any compensation grant prior to its payment, to Mrs Yaled.

Yours faithfully,"

2. File in bring up or computer expiry for 8 weeks.

Procedure following State Insurance reply next page.

Procedures continued

4. State Insurance will reply to letter on previous page stating accident compensation granted at so many dollars per week and before its release want to know amount of widows benefit to be recovered.

5. Re-assess Widows Benefit on form SW 23 from date compensation granted.

The net amount is directly deducted from benefit due e.g. if compensation deducted from grant W.B. 2 would look like this. →

Reduction date shown on S.W. 23 is that from which compensation granted.

Computation	
Benefit rate .. ..	\$1820.32
Less income deduction .. ..	
Less <del>insurance</del> <i>net Accident Compensation</i> .. ..	\$5790.72
Plus earnings subsidy (IB) .. ..	
Plus W.S.D. allowance .. ..	
Benefit recommended .. ..	\$1029.60
Prepared by <i>B. Smith</i>	
Check by <i>A. Tunison</i>	

6. Action S.W. 272  
 B62 - Non standard rate  
 - show new annual rate  
 - amend check rate

7. Overpayment  
 - is simple to assess  
 set out on a minute sheet.  
 e.g. \$262.32 = (pf)  
 \* \$222.72 = deduct  
 \$ 39.60 = Benefit due

The amount of the direct deduction is the overpayment for each due date.  
 The period of overpayment is from date of desired reduction (above) until day before S.W. 747 effects actual reduction.  
 If a deduction results in no W.B. payment watch any ACCOMMODATION BENEFIT paid - This must also form part of the overpayment.

NOTE

VERY IMPORTANT  
 DONT DELAY  
 This part of the action.

8. Debt records to be set up in normal fashion. (Page 210.)  
 207

9. Send letter urgently to State Insurance pointing out amount of widows benefit overpaid after taking into account earnings related compensation. Request cash refund.

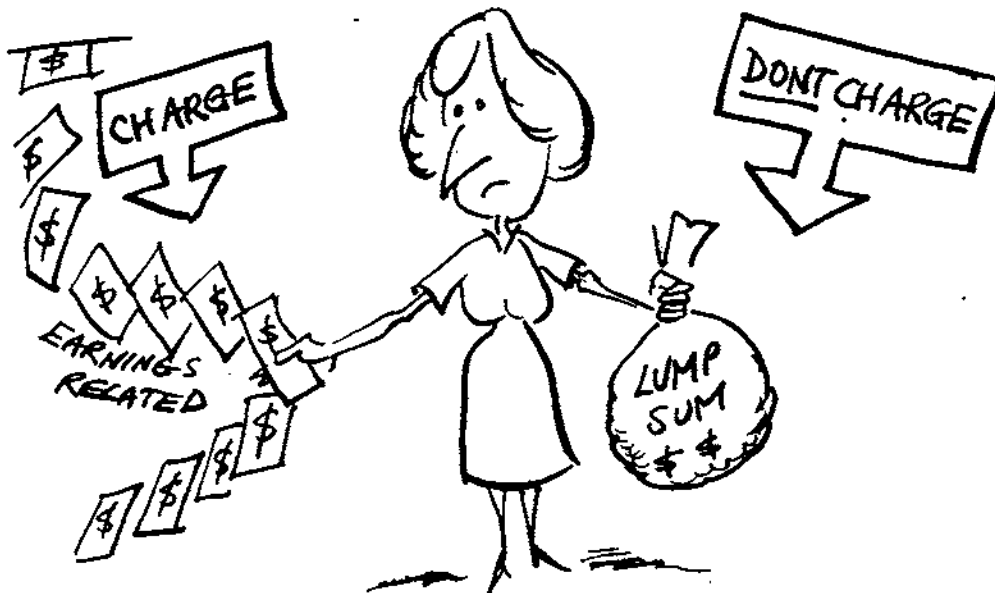
10. Letter to beneficiary:  
 - Reason for benefit reduction  
 - Set out assessment  
 - Mention Review rights.

11. Debt section follow up ACC refund.

ACCIDENT COMPENSATION

SUMMARY

1. Grant Widows Benefit (full rate).
2. Letter to State Insurance or ACC.
3. Compensation approved.
4. Assess overpayment SW 23.
5. SW 747.
6. Set up debt.
7. Letter for refund.
8. Letter to beneficiary re reduction etc.



PROBLEMS IN VERIFYING BIRTH and MARRIAGE

Reference: Part 0 Four Weekly  
Manual  
CM 1986/219

Introduction

1. Marriage must be verified prior to widows benefit grant.
2. Birth must also be verified prior to grant if it is a factor in qualification (i.e. no dependent children cases).
3. Birth verification in other cases is required to link the names with the marriage certificate. In some instances this may be followed up after grant.

NOTE If grant of benefit is delayed on account of the above verification "Service to Widows" payment must be considered.

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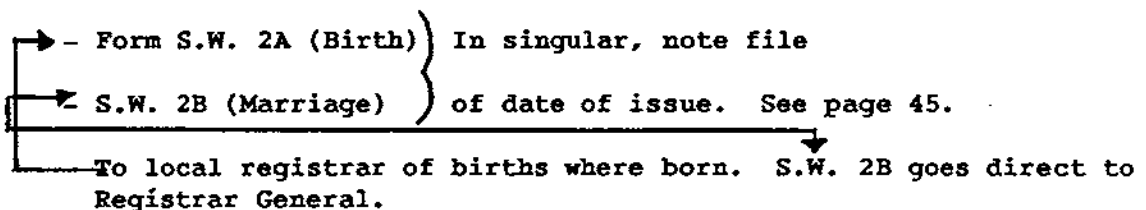
4. Verification Procedure

A. Ask beneficiary to produce certificates (she must make all possible efforts to do so).

\*Photocopy or extract details on S.W. 2A or S.W. 2B (graded officer to check).

\*Certify - copy of original.

B. If does not have certificates and born or married in N.Z. issue:



6. If local Registrar of births has no trace he will issue the form to the Registrar General of Births.
7. If the Registrar General has no trace of the birth then we have to rely on verification by secondary evidence.

see next page

WHAT IS THIS SECONDARY EVIDENCE OF BIRTH?

It is other documentation or evidence that may be able to show the date of beneficiary's birth.

See list page 88 and paragraph 011 four weekly manual.

NOTE: When verifying birth from secondary evidence as many sources as possible must be used to establish the event.

A Senior Officer's approval is required for the acceptability of this evidence.

ALSO NOTE

Marriage cannot be proved by secondary evidence see para 050 four weekly manual - But if Maori custom marriage para. 051 refers.

NOTE: In the case of defacto marriages or Maori custom marriage refer to your Senior Officer to consider a grant as Emergency Widows benefit.

Name discrepancies - Birth or marriage certificate details or names on application forms - if identity obvious don't worry, but watch for any definite aliases - these must be recorded on index. (S.W. 81 if necessary)

MAORI BIRTHS:

Some prior to 1935 are not registered. If Maori applicant cannot produce birth certificate HAVE FORM S.W. 225 COMPLETED AT THE INTERVIEW - Should normal verification fail this saves time in the long run. (Paras 031 - 36 4 Wkly Manual refer.)

continued next page.

# SOURCES OF SECONDARY BIRTH EVIDENCE

1. Baptismal Certificate or Confirmation Certificate.
2. Family Bible.
3. Family Tree or Pedigree chart.
4. Pukapuka Whakapapa (Maori family tree).
5. Marriage certificate.
6. Spouses death certificate.
7. Registration of child's birth.
8. School Records. Ask for years attended, headmaster's name or prominent teacher's name. Send enquiry to Education Board not the Education Department. Enquiries for Maori school records prior to February 1969 should go to Regional Superintendent, Department of Education, Private Bag, Newmarket, Auckland.
9. Passport.
10. Travel Documents - often issued to refugees.
11. Naturalisation Papers.
12. Seaman's discharge certificate.
13. Passenger tickets.
14. Personal keepsakes e.g. Newspaper clippings, Birthday book etc.
15. War Service Records - Army, Navy, Air Force.
16. Lodge Records.
17. Life Insurance - obtain Policy number if possible.
18. Employers - Apprenticeship Records.
19. Union Records.
20. Hospital Records - age of admission.
21. As a last resort, appearance. In this case applicant is to be seen by a senior officer.

# INCOME FROM FARMS, BUSINESS ETC.

Reference:

Part M. Income and Property Manual.  
Section 3 Social Security Act

1. WHAT EFFECT DOES IT HAVE ON WIDOWS BENEFIT?

It is added to other income that is chargeable when assessing the rate of benefit.

Before reading this section YOU MUST UNDERSTAND the definition of income and the principles set out in Section 3 of the Social Security Act and on pages 116-119 of this handbook.

---

2. TYPES OF INCOME

There is generally no problem in recognising and verifying income from usual sources such as earnings, salary, dividends, interest, rent and the like. The income of self-employed persons can present problems when it is necessary to interpret business accounts.

A person who is self employed usually has a Profit and Loss statement prepared by an Accountant each year.

A copy of this statement is produced to the Inland Revenue Department for tax assessment purposes.

Make sure these accounts are certified as correct by an Accountant.

there may be people who do not have a profit or loss statement prepared (e.g. people who for some reason have not filed a tax return).

It will be necessary for these people to produce some confirmation of their income. You should see your senior officer to discuss which would be the most satisfactory method of obtaining the necessary verification in this type of case.

Your senior officer will refer to Part M of the Income and Property Manual in deciding the chargeable income in these cases.

The principle is to establish the "real" income of the applicant i.e. exactly what money the applicant gets from a business to provide for the needs of herself and her family.

---

FARMS BUSINESSES - POINTS TO NOTE

1. Flexibility

With the varying types of businesses in existence there must be a flexible approach as to what amounts are chargeable as income for benefit purposes.

If you have any doubts you should refer to a Senior Officer.

2. WATCH Drawings or directors fees etc

Circulars 1984/182 and 1985/29 cover the above matters which you must have regard to when assessing income from a business venture.

Basically the income of a self-employed person can be defined as:

- (1) the gross turnover of the business less only the business expenses incurred in producing that turnover; or
- (2) the drawings from the business;

whichever is the greater amount

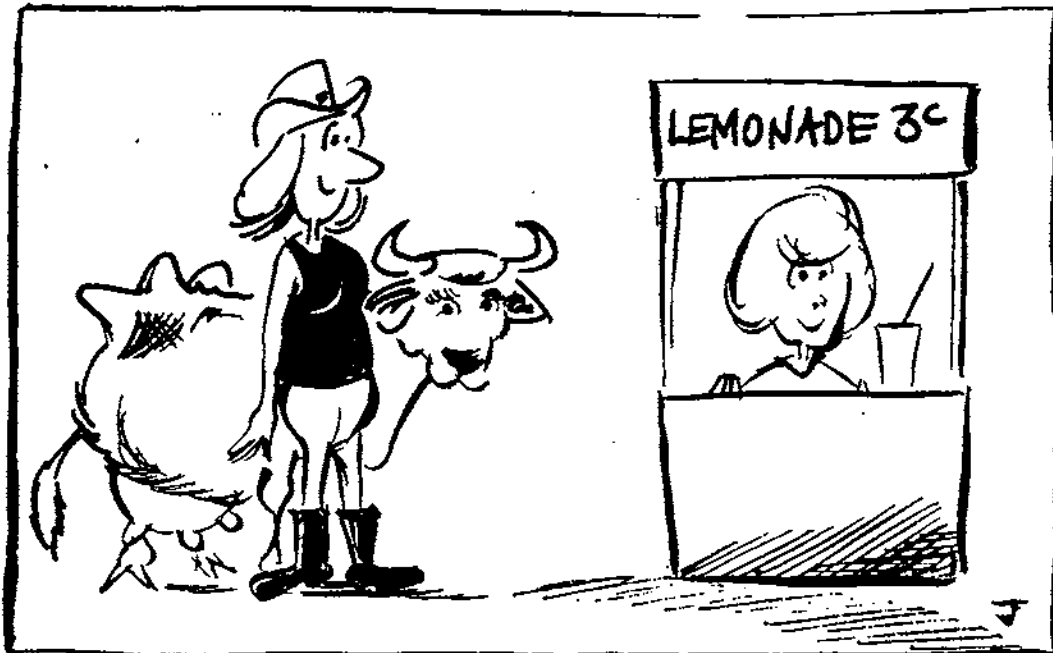
Directors fees are regarded as income for social security purposes.

3. Extraordinary Expenditure Items:

Always examine the accounts. Certain items may require discussion with a senior officer and later clarification with beneficiary or her accountant.

4. Wages

Watch!! - are there staff employed? If wages are paid to beneficiary or her dependent children they may be chargeable as income.





SELF-TEST QUESTIONS

Do not write on this page

If you are not sure of the answer to any questions read the Section again. You will find the answer there.

1. When do you follow up reply to the first estate letter?
2. In what instance is there no qualification to Payment After Death?
3. If beneficiary injures herself and receives an accident compensation payment in what way does the amount effect the widows benefit?
4. If verifying birth from secondary evidence how many sources should be used to establish the event?

ANSWERS

1. Not earlier than first renewal.
2. Where death was the result of an accident.
3. If a lump sum, it is a capital payment and any proceeds from investment of the amount is treated as other income. Not like compensation payable as a result of her husbands death which must operate as a direct deduction from benefit payments.
4. As many as possible.

**OVERSEAS ARRIVALS**

# APPLICANTS ARRIVING FROM OVERSEAS

1. Reciprocal Agreement  
(Australia, United Kingdom).
2. Receiving an overseas pension of a like nature.
3. Other Applicants.

## 1. RECIPROCAL AGREEMENT:

### Reference:

Reciprocity Manual  
Parts B&D  
(In process of update).  
Social Security (Reciprocity  
with the United Kingdom) Act  
1983.  
Social Security (Reciprocity  
with Australia) Act 1948.

Section 21(2) of the Social Security Act  
sets out the residential qualifications for  
widows benefit.

However

Applicants from AUSTRALIA and the  
UNITED KINGDOM can get around these residential  
qualification because of the reciprocal agreement we  
have with these two countries.

### What is the Reciprocal Agreement?

As far as overseas widow benefit  
applicants are concerned it means---

(A) Residence in Australia,

or

(B) Residence in the United Kingdom or  
a period for which United Kingdom  
contributions have been paid ---

May be regarded as  
residence in New Zealand.

Birth in either country  
may be regarded as birth  
in New Zealand.

See next page for  
application procedure.



- WIDOWS ARRIVING FROM AUSTRALIA OR UNITED KINGDOM

OR

- APPLICANTS FROM AUSTRALIA OR UNITED KINGDOM ALREADY IN NEW ZEALAND WHO DO NOT MEET THE N.Z. RESIDENTIAL QUALIFICATIONS ---

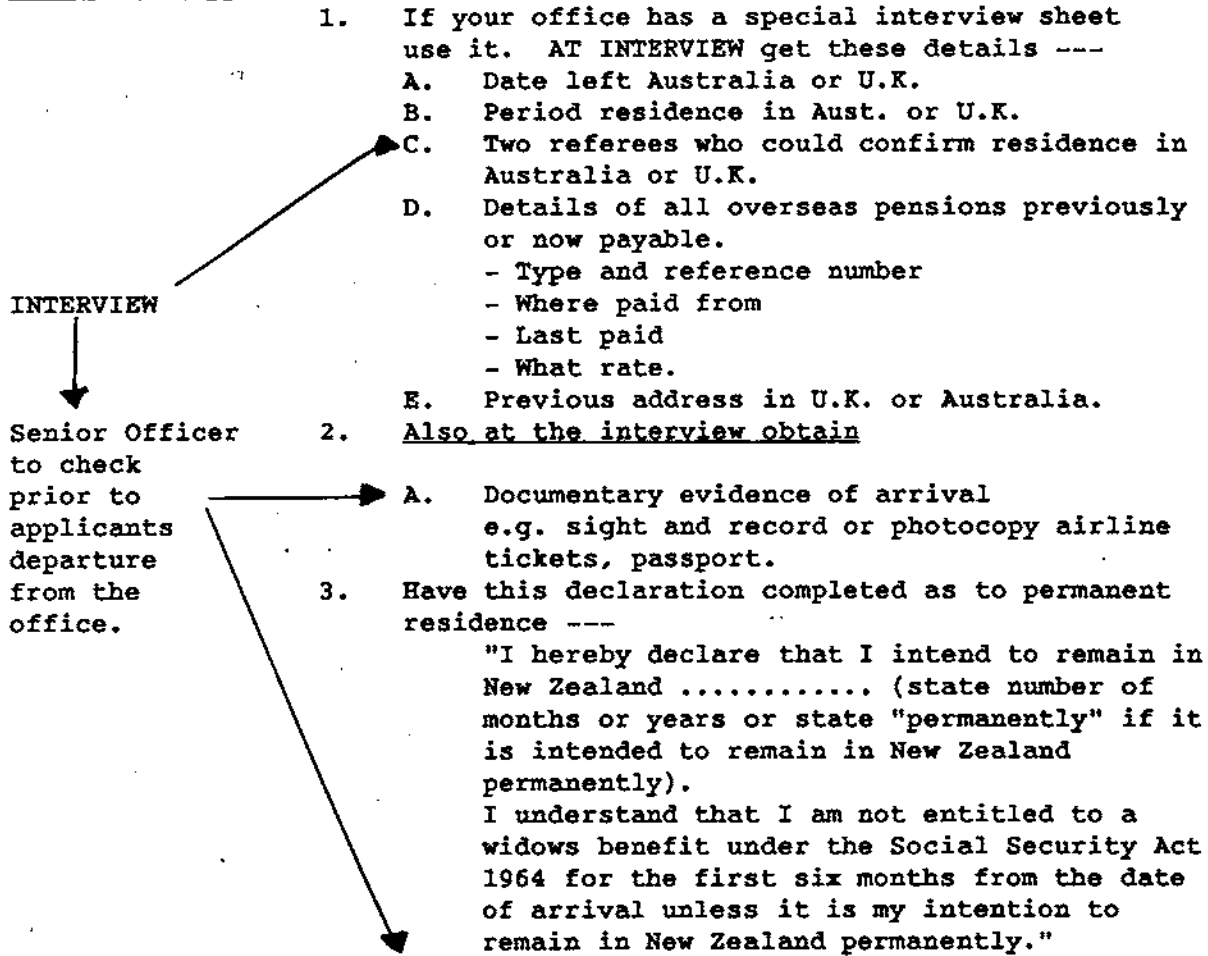
The reciprocal Agreement mentioned on the previous page applies.

NOTE

To qualify under the reciprocal provisions applicant must intend to reside in New Zealand permanently.

Normal application interview procedures. Pages 29-34 apply -

Additional Application Requirements



Note: Australians who have been resident here for more than six months do not have to complete this declaration.

For after interview action see next page.

ACTION AFTER THE INTERVIEW:

--- Interview sheet completed, tickets passport etc sighted  
permanent residence declaration completed ---

Proceed: (Now with the papers on the file)

1. Although applicant may fit into the reciprocal provisions - check does she meet all the other widows benefit qualifications.
- 

2. A. Australia

If form Recip A not received from Australia via Head Office -- Issue one to the appropriate Australia state. (See para B66 Recip Manual).

See page 95.

- 
- B. United Kingdom

If form N.Z. 11 not received from U.K. via H.O. (after 4 weeks of arrival) issue N.Z. 6 in duplicate to Dept Health and Social Security ----

The purpose of the above forms is to verify the o'seas residence.

The forms should be typed, signed by a senior officer and despatched AIRMAIL.

---

- 
- 
3. Assess Benefit

- Above forms may be followed up after grant
- Normal grant procedures page 50 apply.
- In decision on W.B. 2 show "Recip Widows benefit", and date entitled to "straightout" widows benefit.

WATCH is there an Overseas Pension to deduct  
See page 98.

"straightout" means ----

qualifies without recourse to the reciprocal agreement.

---

- - 
  - 
  4. S.W. 310 (Input Form) --- ensure Entitlement code (A41) entered with the correct reciprocal digit.
- 

- - 
  - 
  - 
  5. Letter - mention granted under reciprocal provisions.
- 

- - 
  - 
  - 
  - 
  6. Remember: A. That form Recip A or N.Z. 6 may require follow up.  
B. British pension claim follow up?  
See next page.
-

3. OTHER OVERSEAS APPLICANTS

(Not from Australia or U.K.)

- A. If in doubt as to residential qualification TAKE AN APPLICATION. See pages 9-11.
- B. If applicant clearly does not qualify for widows benefit on residential grounds do not turn her away - there may be qualification for ---
- Emergency maintenance allowance
  - Unemployment or Emergency Unemployment benefit
  - Emergency Sickness benefit

Discuss with a Senior Officer

---

POINTS TO NOTE

1. NOT RECEIVING U.K. PENSION

If beneficiary has made contributions to the U.K. National Insurance Scheme she must be asked to test her eligibility for a British Widows Pension.

(D.91 reciprocity manual applies) - Give her form B.W. 1 to complete.

Also see Part 3 of the Payment in New Zealand of United Kingdom Retirement and Widows Pension Manual.

- . Follow up decision on the pension, -- If notification not received and see page 98 for the assessment. re pension after 8 weeks write to beneficiary and ask if she has been told of any decision.

2. PREVIOUSLY IN RECEIPT OF AUSTRALIAN PENSION

Watch commencement date of N.Z. benefit - see para B52 reciprocity manual.

3. UNITED KINGDOM

Includes: England, Scotland, Wales, Northern Ireland and Isle of Man  
Not the Channel Islands.

4. WATCH If spent more than normal travelling time in countries en route to New Zealand discuss with Senior Officer.

# RECEIVING AN OVERSEAS PENSION OF A LIKE NATURE

## References:

Section 70 of Social Security Act. Part O Income and Property Manual  
4.182 DP Manual

### A. What has to be done

Section 70 of the Social Security Act requires that a pension or allowance paid by an overseas country be DIRECTLY DEDUCTED from the rate of the New Zealand benefit, providing that the overseas pension is payable for a similar contingency as the New Zealand one.

The main reason for Section 70 is to place beneficiaries from overseas in no better position than New Zealand beneficiaries.

NOTE: Two different systems operate depending on whether the pension is paid from Australia or United Kingdom.

1. An Australian Widows Pension would be deducted from the New Zealand Widows Benefit. However a widow cannot qualify for New Zealand benefit having recourse to the Reciprocal Agreement with Australia if she receives an Australian widows pension here.
2. If a beneficiary has entitlement to a British Retirement or Widows Pension this Department retains the United Kingdom pension and pays the New Zealand Benefit in full.
3. Payments like a War Disability Pension from an overseas country would not operate as a direct deduction from the New Zealand Widows Benefit.

### B. How are the Overseas Pensions Paid ?

Most are paid direct to beneficiary by the particular overseas authority. e.g. the United Kingdom Department of Health and Social Security each 4 weeks either posts a cheque or credits the amount of the pension to a bank account, unless a New Zealand Benefit is payable when the pension is paid direct to Head Office.

The exceptions are the Australian Pensions. These are paid to the pensioners by direct credit to their bank accounts and these payments are arranged by the District Offices.



NEW APPLICATIONS - NEW ZEALAND BENEFIT - UNITED KINGDOM RETIREMENT  
OR WIDOWS PENSION PAYABLE

- A. Process the application for New Zealand benefit in the normal way.
- B. Determine the amount of United Kingdom pension payable from documentary evidence.
- C. Convert the United Kingdom pension pound sterling rate to New Zealand currency at the current rate of exchange.
- D. This exchange rate is supplied each fortnight by the Accounts Division Head Office e.g. UK 4.33 pw @ NZ\$2.3250 = \$10.06 per week.
- E. Providing the United Kingdom pension is less than the New Zealand Benefit, arrange the grant of the New Zealand Benefit.
- F. Record the United Kingdom Pension Reference number and weekly pension rate on the New Zealand Benefit master record in accordance with instructions in the appropriate Data Processing Centre Manual.
- G. Forward form SW 329 to the Data Processing Centre.
- H. Should the United Kingdom pension exceed the New Zealand benefit rate decline the application. Ensure the decline letter clearly explains the statutory provisions of article 15.

NEW ZEALAND BENEFIT ALREADY PAYABLE - NOTIFICATION OF GRANT OF UNITED  
KINGDOM PENSION

- A. The United Kingdom authorities will advise of their authority to pay new pensions by way of:
    - (i) Forms NZ 10(BRP) or NZ 11 (WP) forwarded to districts via Head Office.
- and
- (ii) Magnetic tape direct to the Data Processing Centre. The Data Processing Centre will forward form SW 327 to District Offices. (Form SW 327 notifies any new pensions included on the tape).

B. District Office Procedure:

- (i) Check via the file or by way of on line enquiry if the United Kingdom pension details have already been added to the master record.
- (ii) Compare dates of grant of the New Zealand benefit and the British pension.
- (iii) If date of grant of the British pension is the same or later than the grant of the New Zealand benefit prepare input form to add the United Kingdom pension reference and weekly rate (pound sterling) to the master record. Remove any expiry date recorded initially to check as to United Kingdom pension entitlement.
- (iv) Forward SW 329 to the Data Processing Centre.

NOTE: Overpayments should not arise as the overseas pension already received will have been retained via the Data Processing Centre.

- (v) If the date of grant of the United Kingdom pension is earlier than the date of grant of the New Zealand benefit request the Data Processing by memorandum to pay to beneficiary the amount of the pension which should not have been retained. This request should be addressed to the Executive Officer Pay Control, and must include the actual amount of New Zealand dollars to be paid and the beneficiaries current bank account number.

SECTION B

NEW APPLICATIONS - NEW ZEALAND BENEFIT - AUSTRALIAN WIDOWS BENEFIT PAYABLE

So long as there is eligibility for statutory (straight out) widows benefit -

- A. Process the application for New Zealand benefit in the normal way.
- B. Determine the rate of Australian Pension payable from documentary evidence.
- C. Convert the Australian pension rate to New Zealand currency at the current rate of exchange.
- D. This exchange rate issupplied each fortnight by Head Office.
- E. Providing the Australian pension is less than the New Zealand benefit arrange the grant of the New Zealand benefit treating the Australian pension as a direct deduction from the New Zealand benefit.
- F. Prepare SW 310 - Add B62 annual non standard rate.
- G. Advise beneficiary of grant of benefit and explain reason for direct deduction and show assessment.

NEW ZEALAND BENEFIT ALREADY PAYABLE - NOTIFICATION OF GRANT OF AUSTRALIAN WIDOWS PENSION

- A. The principles as for new applications apply except that form SW 23 is used to review and reduce the benefit.
- B. It will be necessary to establish an overpayment - Procedures Page 209 apply.

POINTS TO NOTE WITH OVERSEAS PENSIONS

Reviews

When doing a retrospective review of deducting the overseas pension from the New Zealand benefit paid ---

Review from date of receipt of the overseas pension

Principles page 97 apply

THE EXCHANGE RATE TO BE APPLIED IS THE ONE IN THE PERIODS COVERED BY THE OVERPAYMENT WHICH IS MOST ADVANTAGEOUS TO THE BENEFICIARY

POINTS TO NOTE WITH OVERSEAS PENSIONS

Reviews

1. When doing a restrospective review of deducting the overseas pension from the New Zealand benefit paid ---
- Review from date of receipt of the overseas pension
- Principles Page 98 apply
- THE EXCHANGE RATE TO BE APPLIED IS THE ONE IN THE PERIODS COVERED BY THE OVERPAYMENT WHICH IS MOST ADVANTAGEOUS TO THE BENEFICIARY

Agent

2. With United Kingdom pensions this Department is only responsible for operating the payment system; and not for ensuring correct payment.

Beneficiaries should now be encouraged to contact the U.K. direct regarding any U.K. pension queries.

However do assist where beneficiary has problems in coping with any communication.

NOT A DIRECT DEDUCTION

4. If the overseas pension is not directly deducted it must be included as chargeable income.

5. MANUAL

You should familiarise yourself with this Manual:

- "Payment in New Zealand of United Kingdom Retirement and Widows Pensions"

Addresses and what forms to issue next page.

45P/895F

# OVERSEAS DEPARTMENTAL ADDRESSES

SEND YOUR LETTERS AND FORMS TO THE CORRECT ADDRESS

## 1. UNITED KINGDOM

England, Scotland and Wales	Department of Health and Social Security, Overseas Group, Newcastle Upon Tyne, <u>ENGLAND NE 98 1YX.</u>
Northern Ireland	Ministry of Health and Social Services, Castle Buildings, Stormont, Belfast, BT4, 3HH, <u>NORTHERN IRELAND.</u>
Isle of Man	The Isle of Man Board of Social Services, Hill Street, Douglas, <u>ISLE OF MAN.</u>

## 2. AUSTRALIA

The Director,  
Department of Social Security,  
Box 4158X,  
SYDNEY,  
NEW SOUTH WALES 2001  
The Director,  
Department of Social Security,  
G.P.O. Box 51A,  
MELBOURNE,  
VICTORIA 3001.  
The Director,  
Department of Social Security,  
G.P.O. Box 1088,  
BRISBANE,  
QUEENSLAND 4001.  
The Director,  
Department of Social Security,  
G.P.O. Box 481,  
ADELAIDE,  
SOUTH AUSTRALIA 5001.  
The Director,  
Department of Social Security,  
G.P.O. Box P1187,  
PERTH,  
WESTERN AUSTRALIA 6001.  
The Director,  
Department of Social Security,  
Box 356D G.P.O.,  
HOBART,  
TASMANIA 7001.  
The Registrar,  
Department of Social Security,  
Box 120,  
CANNBERRA,  
A.C.T., AUSTRALIA.

Regional Director,  
Department of Social Security,  
P.O. Box 2346,  
DARWIN N.T. 5794,  
AUSTRALIA.

### NOTE

ADD TO SPACE ABOVE NAME  
PANEL ON FORMS RECIP B:

SYDNEY - For attention  
Position A24

BRISBANE - For attention  
E133.

Forms to use see next page

# LIST OF OVERSEAS FORMS

## ISSUE THE CORRECT FORM

### 1. UNITED KINGDOM

- N.Z. 2 Form sent by N.Z. to U.K. when a person receiving widows benefit leaves N.Z. for the U.K. Delete question 4(d).
- N.Z. 4 Form to be sent by U.K. to N.Z. when a widow makes application in the U.K. for a widow's pension by virtue of residence in N.Z.
- N.Z. 5 Form sent to N.Z. by U.K. giving details of National Insurance Pension paid to a N.Z. beneficiary during a period of temporary absence in U.K.
- N.Z. 6 Form to be sent by N.Z. to U.K. when a widow claims widow's benefit in N.Z. by virtue of residence in U.K.
- N.Z. 9 Form sent by N.Z. to U.K. where a beneficiary received a U.K. pension during a temporary absence in U.K.
- N.Z. 11 Notification sent to N.Z. from U.K. (when a widow leaves U.K.) showing confirmed periods of widow's and late husband's U.K. residence also date of marriage and date of husband's death, etc.
- 

### 2. AUSTRALIA

- Recip. Form A - Notification of permanent transfer.
- Recip. Form B - Authority for payment on an agency basis.
- Recip. Form C - Advice of payments on an agency basis.

**FAMILY SUPPORT**

## FAMILY SUPPORT

Reference: Family Support Tax  
Credit Policy  
Manual - Part C  
CM 86/179

Family support became effective from 1/10/86.

### Eligibility Criteria:

To receive Family Support a prerequisite is that the applicant is receiving family benefit.

### Rate of Payment:

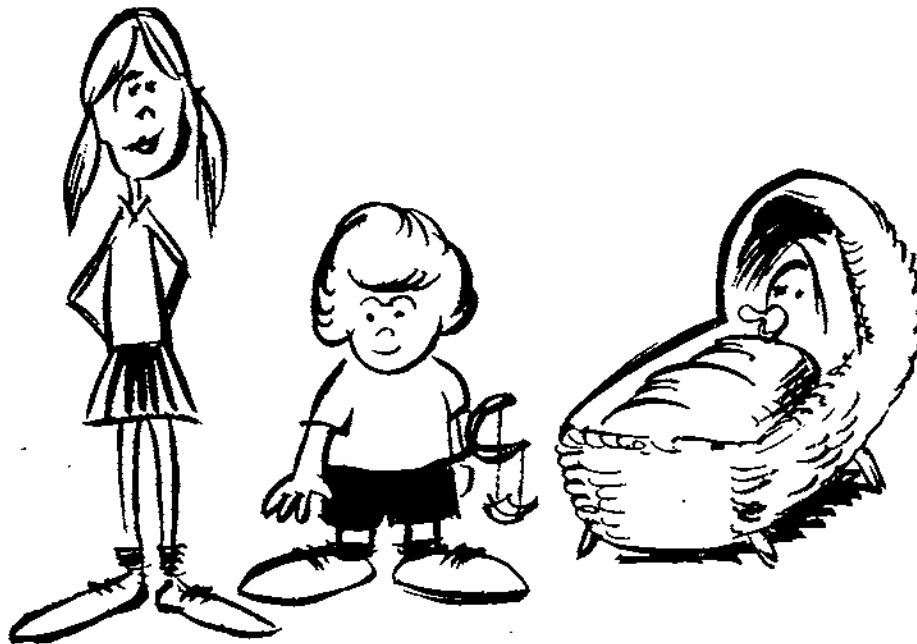
The maximum rate of Family Support is \$36.00 p.w. for the first child and \$16.00 p.w. in respect of the second and each subsequent child.

### Commencement and Duration of Grant:

Where the applicant for a benefit is in receipt of family benefit for a child or children, Family Support for that child or children is to be granted concurrently with the grant of parent benefit and from the same date.

Family Support will continue for the duration of the parent benefit provided family benefit in respect of the dependent child or children does not cease.

Part C of the Family Support Tax Credit Policy Manual covers, in greater depth, the criteria and requirements for on-going Family Support payments. The Family Support Procedures Handbook (for beneficiaries), will guide you in completing assessments and reviews of entitlement.





**PAY SYSTEM**

# INPUT FORMS

(The Computer System)



It was mentioned previously that payment of widows benefit by bank credit is arranged via the Data Processing Centre.

The Data Processing Centre (D.P.C.) is another name for the part of the Department where the Computer is housed and operated. The centre located at Upper Hutt also has functions other than benefit payment but space does not permit mention here.

The Data Processing Centre can only issue the first benefit payment following advice from a District Office.

- How is this advice transmitted?

## THE SYSTEM WORKS LIKE THIS:

1. Clerks at the District Office (i.e. the office you work in) put details on forms called INPUT FORMS.
2. The original forms are then forwarded to the district office pay section where details are keyed (button pressing) into a machine. This machine relays the information to the Upper Hutt computer.
3. The Computer processes the information and eventually produced at the desired amount is:
  - A. Payment order (posted from the D.P.C. direct to beneficiary).
  - or
  - B. Details on a tape (like a tape recorder one) and relayed to banks for crediting to beneficiary's bank account.
4. Payments are then issued automatically each two weeks, unless a change is notified via another input form. However when there is a general increase in benefit rates the computer automatically up dates the payment and issues arrears in most cases.
5. The computer stores information from the input form and later if desired this information can be used for statistics or telling districts that some action on the benefit is required - an example here is the production of expiry lists.
6. The collection of information stored on each benefit is termed a MASTER RECORD.

continued next page

## TYPES OF INPUT FORMS

1. To register a new application S.W. 746
2. To establish a Master Record (at grant) S.W. 310 S.W. 271.
3. Notify changes to the Master Record - S.W. 747.
4. To close a Master Record (cancellation) S.W. 273.
5. To arrange a Daily Direct Credit. S.W. 55.

---

## WHAT INFORMATION IS REQUIRED ON THE MASTER RECORD?

The information is conveyed by codes.  
See chart S.W. 313.

### For example:

- (i) At grant (S.W. 310) if in addition to details required to be entered on the top half of the form. e.g. Additional benefit was granted you would show A60 and the weekly rate.
- (ii) For any addition after grant (S.W. 272) prefix the information codes with B. Look up the information code on chart S.W. 313 and add what details are required.
- (iii) If something has to be deleted. Prefix the code with D. e.g. to remove a bring up date - show D96.

## IF REVIEWING A BENEFIT - check chart S.W. 313 ---

- Do details need adding or deleting.

### Remember:

The information added to the master record at grant must be amended on the master record if changes take place. e.g. change of address  
change of name etc.

Examples of completed forms  
are shown throughout this  
handbook but also see below.

---

## COMPLETION OF THE FORMS

This is detailed from paragraph 2.53 in the data Processing Manual - but

remember - (i) USE BLOCK LETTERS.

- (ii) Separate amounts with a - dash and precede with the dollar sign  
e.g. - \$002-00
- (iii) Working out check initials - follow these principles
- (iv) The CHECK RATE - see page 60.
- (v) Separate dates with dashes  
e.g. 13-01-87.
- (vi) Only show coded information - other comments will be ignored.

<u>NAME</u>	<u>CHECK INITIALS</u>
JOHN MCKENZIE	JM
BRIAN PETER STAHAN	BS
PETER VAN BRUNNICK	PV
KEVIN HARDING-JONES	KH
WI TAORREI PURU	WP
WILLIAM TE HAINGA	WT
CHIU KAM	CK
MARY O'CONNOR	MO
JANE D'ARTH	JD
JOHN DE LA COUR	Jp
BRIAN ST JOHN	BS

### Deadlines

- (i) If payment is to be adjusted before a certain due date make sure the input is keyed before the "last keying date" shown on the (S.W. 396) pay period chart.
- (ii) Watch - don't send the input off too early for keying and then have it actioned before the desired due date.  
- These forms in the interim are usually held on a clip on the division.

## REJECTION OF FORMS:



The Computer is programmed to check certain details both entered on the form or with information it already holds.

**Example:** If the check initials don't agree with the name the form will reject i.e. will not be actioned by the computer.

Also if things like chargeable income details don't tie in with the check rate the form will be rejected.

There are many other instances (too numerous to list) where forms can be rejected.

## WHAT HAPPENS IF THE FORM REJECTS:

It is returned to you to do again.

## WHAT ARE THE CONSEQUENCES?

1. Payment to beneficiary may be delayed - This causes her problems and will result in phone calls etc.
2. An overpayment may arise.
3. You START TO DOUBLE YOUR WORKLOAD!!!

## HOW TO AVOID REJECTIONS:

- You must read the Social Security Benefits Data Processing Manual.
- Get a copy of it to keep on your desk and don't forget USE IT
- The manual has a good index at the front. When doing an action you are not sure of - look up the appropriate section in the manual.

## NOTE: Be efficient

1. Most input rejections are the result of carelessness and involve minor things like incorrect check initials and check rates - Double check these. Your own carelessness results in more work for others as well as yourself.

## Signatures:

2. These input forms must have two signatures, except where responsibility position work applies.
  - S.W. 310 (Establish Master Record)
  - S.W. 273 (Closing Master Record)
  - S.W. 747 when (i) resuming payment  
(ii) change in rate of payment

All other inputs may be signed by one person.

## 3. Number of Forms:

If more than one input form (for same benefit) sent for keying on same day both will reject.

**LETTER WRITING**



# LETTER WRITING

A HIGH STANDARD OF LETTER WRITING IS ESSENTIAL AS THIS FORM OF PUBLIC CONTACT IS OUR MOST FREQUENT

Never delay replies - if unable to reply in full issue an interim reply.

All letters must be answered in interim form or fully within two weeks of their receipt.

## THE FORMAT OF YOUR LETTER

DEPARTMENT OF SOCIAL WELFARE		
DISTRICT OFFICE, PRIVATE BAG 7E ARD, WELLINGTON 1 ADDRESS: 141 MANNERS STREET, WELLINGTON		Telephone: 850 139 Social Security: 857 888 Telegrom:      Direct If questioning or seeking advice about this letter, please ask for Mr D. Brown Reference: Widows Benefit 4/78293
Mrs Blaire Sansbotton 777 Perival Street, Flagstaff Hill, Wellington.		18.11.81
Dear Mrs Sansbotton,		
<u>Widows Benefit 4/78293</u>		
Thank you for letting me know that you have ceased employment permanently.		
Your Widows Benefit has now been increased to the full rate of \$6079.84 per annum from 17.10.81. Arrears for the period 17.10.81 to 8.11.81 will be included in the payment for due date 1.11.81 which will be at \$294.84. Future instalments will be at \$211.84 each two weeks.		
If you are dissatisfied with the decision above, you are entitled to have the decision reviewed by the Social Security Commission.		
If you wish to have the decision reviewed, you should apply in writing, within three months, setting out briefly the grounds on which you object to the decision. A form for this purpose is available from any office of this department (S.W.143 - Application for Review of Decision).		
Yours faithfully,		
 D. BROWN for Director		

1. Typed form .. hand written letters only acceptable in exceptional circumstances.
2. The writers name must be typed under the signature.
3. Always show the contact person in the top right hand corner.
4. Departmental letter heads must always be used.
5. Never quote Manual references these are meaningless to the public but if declining a benefit or refusing other provisions, always quote the relevant statutory authority (Section of the Act) and explain it if necessary.
6. Always show the benefit reference.
7. Some letters require inclusion of REVIEW PROVISIONS - see page 229.
8. A COPY OF ALL LETTERS MUST BE PLACED ON THE FILE.

- NOTE:**
- (i) Letters OVERSEAS must be sent airmail.
  - (ii) ALL letters must be signed by persons graded 007.102 or above.
  - (iii) The date on the letter must be the day of posting.

More techniques next page

HOW TO WRITE A GOOD LETTER

1. ALWAYS be POLITE - even if you are answering a discourteous letter.
  2. The OPENING REMARKS should indicate why you are writing the letter.
  3. Keep it BRIEF - but ensure you will be understood.
  4. Set it out in LOGICAL SEQUENCE - long poorly set out letters will possibly be ignored.
  5. Use PLAIN LANGUAGE - It is a mistake to think that big words show a better education.
- 

WHY SAY THIS:

"I am indebted for your communication in which you advised me of your contemplation to be engaged in remunerative employment..."

WHEN YOU COULD HAVE SAID THIS:

"Thank you for letting me know that you are starting work..."

---

ONE TEST IS:

WOULD YOU LIKE TO RECEIVE THE LETTER YOU HAVE WRITTEN?

---

THESE WILL ASSIST IN IMPROVING YOUR LETTER WRITING SKILLS:

1. LETTER EXAMPLES in this handbook indicate the general style to be followed - There is an index on page 252.
2. Books available from your library at Head Office: (Just send a note to the library to make your request):

The books in order of usefulness are:

		<u>Classification No.</u>
A.	<u>BETTER BUSINESS LETTERS</u> 2nd edition Reid & Silleck	658.435
B.	<u>A GUIDE TO THE WRITING OF BUSINESS LETTERS.</u> Bacie	651.75BRI

3. State Services training publications on correspondence.

What to avoid - see next page.

WATCH THE LANGUAGE YOU USE

1. ARE YOU BEING UNDERSTOOD?

<u>Avoid</u>		<u>Use</u>	<u>Avoid</u>		<u>Use</u>
approximately	-	about	endeavour	-	try
frequently	-	often	ascertain	-	find out
sufficient	-	enough	negligible	-	small, slight
peruse	-	read	numerous	-	many
communicate	-	write	dispatch	-	send
residence	-	house, home	institute	-	begin
therefore advise this office	-	let me know.			

2. AVOID STOCK PHRASES:

in the near future	-	soon
at the present time	-	now
give your consideration to	-	consider
please do not hesitate to	-	please
costs the sum of	-	costs
until such time as	-	until
at your early convenience	-	soon
at this moment in time	-	now
come to a decision	-	decide
for an amount of	-	for
in the event of	-	if
regret exceedingly to advise	-	sorry to say
we find ourselves in complete agreement with	-	we agree

3. MEANINGLESS EXPRESSIONS:

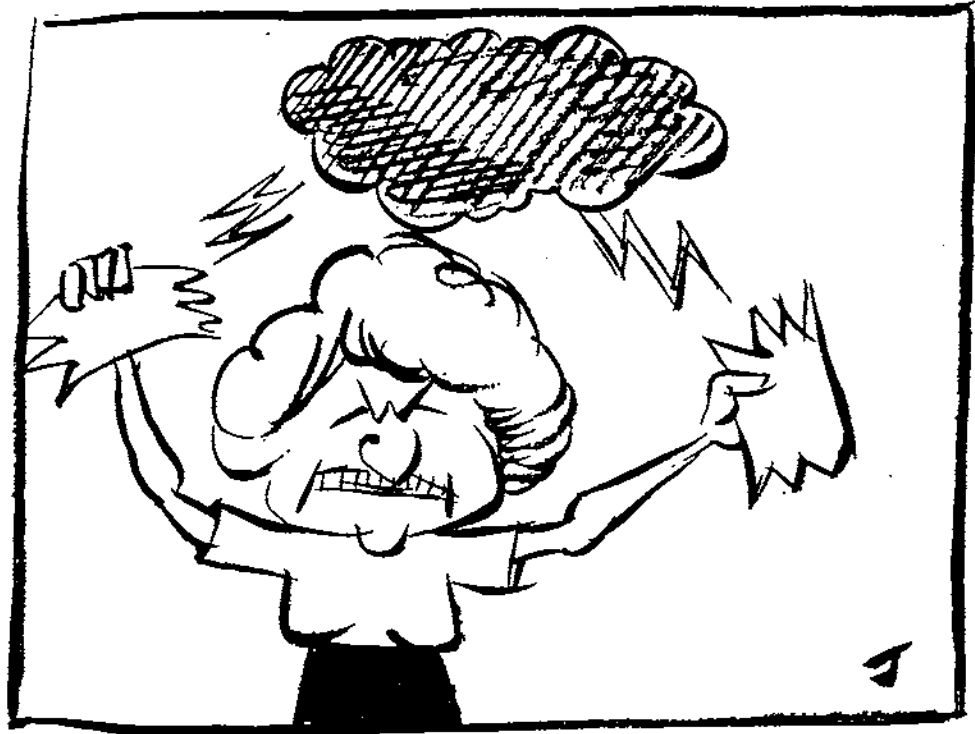
These are just empty words and add nothing to your letter -

- as a matter of fact
- it has come to my attention
- will have our earliest attention
- for your information I might explain
- this is to inform you
- let me say in reply
- May I say also
- I wish to advise

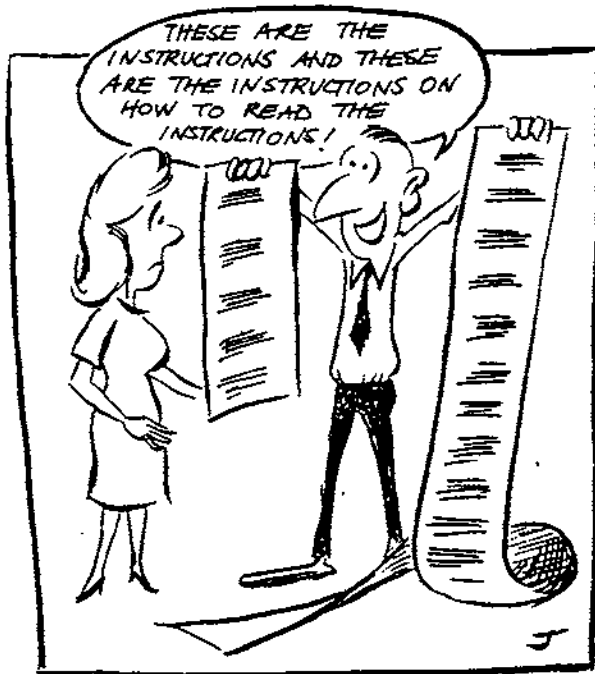
4. NEVER USE OFFICE JARGON - WRITE ENGLISH NOT "GOVERNMENT DEPARTMENT ENGLISH"

see next page for illustrations



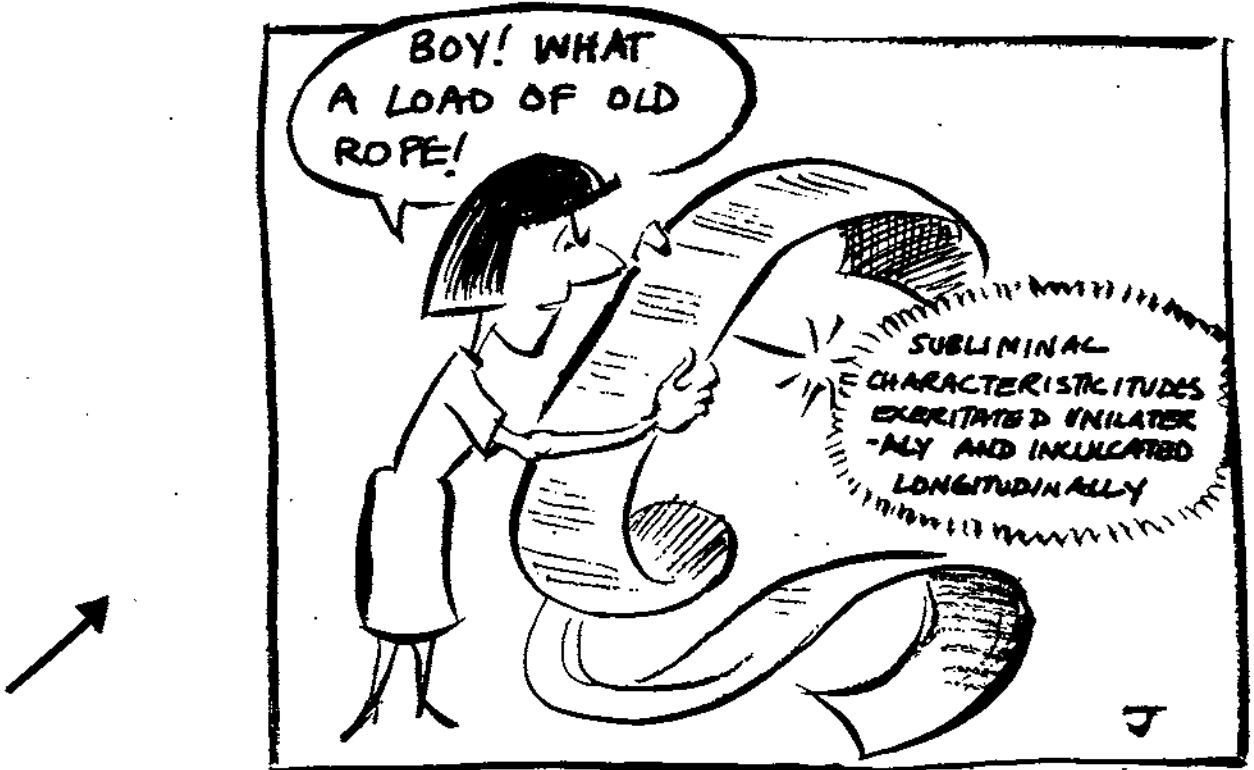


Be polite dont upset the reader



Keep the letter brief - but ensure the message is clear  
Bad letters are always longer than good ones.

continued



Big Words don't impress anyone.



Be fair on others, and save time ... Take special care to ensure the typist can easily ready your draft.

PRE PRINTED LETTERS

Typed letters are preferable, but in case of urgency these forms are available for use:

Form S.W. 34A - Interim reply.

Form S.W. 34B - Requesting early reply to a letter.

Form S.W. 34D - Letter form.

Form S.W. 82 - Request for additional information.

---

When using these forms ensure:

- Handwriting is not only legible but very neat.
- Signature is clear.
- You print in the name and address panel.
- Full office address and telephone number shown.
- Contact persons name shown.
- You DATE it and put a COPY on the file also with the date.

SELF-TEST QUESTIONS

Do not write on this page

If you are not sure of the answers to any question read the section again. You will find the answer there.

1. What is the special provision that applies to applicants arriving from Australia or the United Kingdom?
2. To qualify under the reciprocal provisions what must applicant intend to do?
3. If beneficiary is receiving an overseas pension of a like nature to a widows benefit what must be done?
4. Why is it important to ensure all input forms have the correct check initials and check rate?
5. What is the preferable form of a letter, and what record of it should be kept?
6. What should you do to ensure your letter is easily understood?

ANSWERS

1. The reciprocal agreements which provide that residence or birth in either country may be regarded as residence or birth in New Zealand.
2. Reside in New Zealand permanently.
3. The overseas pension is required to be directly deducted from the New Zealand widows benefit payments.
4. If rate or initials incorrect, the form will reject. This creates more work for you and could possibly interrupt beneficiary's payment.
5. Typed, and a copy showing the date of posting must be on the file.
6. Keep it brief, use plain language, and set it out in logical sequence.  
Don't forget to be polite.

**INCOME**

# INCOME

## References:

Income and Property Manual  
Section 3 of Social Security Act  
CM 1986/163

## WHAT IS INCOME?

Section 3 of the Social Security Act provides a definition of "income" for social security purposes but in simple terms it is money derived or received. This is usually income from sources such as earnings, salary, dividends, interest, rent and the like. Income from self employed persons is sometimes difficult to define and you should always discuss such cases with a Senior Officer.

---

## Remember:

The maximum widows benefit is reduced if the income of applicant or beneficiary exceeds \$2,600.00 p.a. if the applicant has no dependent children or \$3,120.00 p.a. if she has dependent children.

---

## RELEVANT INSTRUCTIONS:

It is not the intention to get too detailed in this section, but please read parts A - D of the Income and Property manual, and familiarise yourself with the remaining parts of the manual.

---

## HOW TO CHARGE INCOME AGAINST THE BENEFIT:

The gross (pre tax) not the net income is converted to an annual figure: For assessment example see page 56.

The rule is that at grant prospective income (ie what will probably be received in that year) is charged, and at renewal the actual income received in the previous income year is charged against the benefit.

· But like most rules there are  
unfortunately exceptions - see page 122  
on earnings.

---

## What is the INCOME YEAR?

An administrative period that expires 2 pay periods (8 weeks) before renewal date.

### Why have it?

It enables the renewal to be dealt with before the actual benefit expiry, and thus prevents payment interruption.

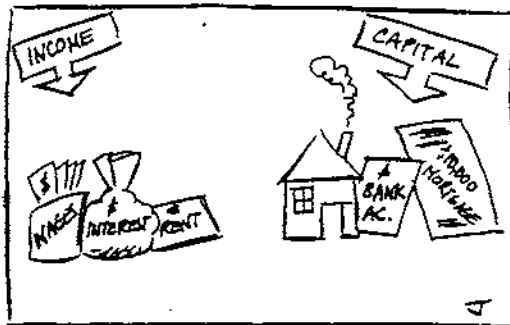
Don't confuse with the BENEFIT YEAR which is a period of 52 weeks (13 four weekly pay periods) commencing from the date the renewal takes effect.

Remember page 13.

## DISTINGUISH BETWEEN INCOME AND CAPITAL:

A Capital payment is not generally chargeable against the benefit, but only the income derived from that capital is brought to charge. (However, see below\*)

We will illustrate the above principle from this example:



Beneficiary wins \$30,000 from a lottery or receives the same amount from an Insurance policy \$10,000 is spent on travel and furnishings. The remaining \$20,000 is invested at 10% \* p.a.. Benefit in this case would be reviewed from the date the money was invested or 1st available date thereafter not from the date of receipt of the \$30,000 which is in fact a capital payment. The income brought to charge would be the prospective amount on the \$20,000 investment i.e. \$2000.00 p.a.

Note: DEPRIVATION OF INCOME

If beneficiary held on to the \$30,000 in a non interest bearing account, After 3 months we would look at arbitrarily assessing income at 3% on the amount held. But be flexible where there is an intention to make some type of purchase. However up to \$2,000 may be held without imposing an arbitrary assessment.

See part F of the Income Property Manual for full details and for explanation of other instances of income deprivation.

### \* Capital Payments to be Charged as Income

If payments of capital are made on a regular basis and are used by the beneficiary for the support of himself and/or family they may be charged as income (eg drawings from a business). Discuss with a senior officer if you think this is the case.

---

## PROPERTY

Only income from property and not the value of property is taken into account, but also see F 19 I & P Manual where beneficiary deprives herself of income from property. But in assessing ACCOMMODATION BENEFIT property is taken into account. See Page 139

\* See para D31 Income and Property Manual.



WATCH OUT!!

The following income is NOT CHARGEABLE

- Family benefit
- War disability pension
- War widows pension
- Handicapped child's allowance
- Disability allowance
- Up to \$104.00 p.a. received by way of sick benefit from a "friendly" or like society.

ALSO BEWARE because the following income rather than be charged against the benefit is required to be a DIRECT DEDUCTION

- Overseas pension of a like nature e.g. (i) Widows pension from United Kingdom.  
(ii) Child element overseas pensions.
  - Late husband's Accident compensation.
-

PROBLEMS!!

- \*  
IMPORTANT            If you are not sure how to treat or verify certain types of income - \*First look up the income and property manual - especially Part U. If you can't find the answer there ask your Senior Officer.
- 

SOME TRAPS WITH INCOME:

- Verification of income only required if the declared income is \$2,548.00 p.a. for applicants without dependent children or \$3,068.00 p.a. for applicants with dependent children.
- Special provisions apply to verifying overseas income - See Part E income and property manual.
- Rent from property is chargeable as income but certain expenses may be deducted see Part P income and property manual.
- Race and lottery winnings etc and cash gifts are not to be treated as income.
- Repayments of loans etc only the interest not the capital repaid is regarded as income.
- National Savings Accounts                      Post Office National Development Bonds  
    Refer Para U.185                                      Refer Para U.189
- Two Year Investment Accounts (U.191) - charge interest as income in year of its receipt.
- Dividends from shares - Dividends must be charged as income (See U.247 Undistributed profits in a Private Company). At renewal dividends should be verified from the stock exchange list. If amount differs considerably from previous year issue S.W. 8b.  
  
Using the stock exchange list -- Add interim and final dividends. Dividends shown are cents per share (not %) - multiply this figure from the number of shares held. i.e. 25c x 100 = 2500 - \$25.00.
- Tertiary bursaries - regarded as income - but before charging check Para U.263 deductions can be made.
- Income not actually received but accruing is still chargeable Any investments like this - check Part U.
- Superannuation - See Part R. Income and property manual.  
    Govt super - show reference on master record.

**TRANSITION TO WORK ALLOWANCE**

## TRANSITION TO WORK ALLOWANCE

Reference: CM 1986/203  
Social Security  
Amendment Act 1986 69D

Transition to Work Allowance is available to encourage people who have been in receipt of a benefit for twelve months, or more, to move into the permanent full-time work force.

The payment of this allowance enables the person to be \$20.00 per week better off than they would have been on benefit. However, the maximum allowance payable must not exceed \$40.00 per week.

The definition of full-time employment for the purpose of transition to Work Allowance is 30 hours per week and permanent employment is defined as 'an unspecified non-finite (unlimited) period'.

Transition to Work Allowance is non-taxable, and non-recoverable.

Transition to Work Allowance is payable for 13 weeks from the date of cessation of benefit.

Payment of transition to Work Allowance can be paid in a lump sum or in regular weekly or fortnightly instalments (in line with benefit payments).

### Applications:

These can either be received from the beneficiary or if the beneficiary advises that they are commencing full-time or permanent employment you should send them an application form for Transition to Work Allowance.

### Receipt of Application:

When you have received the application for Transition to Work Allowance ensure it has been completed correctly and follow up confirmation of details as necessary.

Index on Common Index.

### Calculating Entitlement:

Use the Transition to Work Allowance (SW372) to assess beneficiaries entitlement to Transition to Work Allowance.

Any other allowances received while on benefit, such as Accommodation Benefit, Special Benefit and Disability Allowance, are also to be included in the total net weekly income.

There are three basic steps involved in the calculation process:

Transition to Work Allowance (Cont.)

STEP ONE

- (i) If the applicant had earnings while on benefit, calculate the net weekly earnings using the PAYE tax tables prepared and supplied by the Inland Revenue Department. Add this to any other income and the net rate of benefit that was payable. This is the net weekly income while on benefit.
- (ii) Add \$20.00 to this total to make Total A.

STEP TWO

Calculate the net weekly earnings after deduction of G tax, while in full-time employment. Add to this any Family Support payments as well as any payments under the Guaranteed Minimum Family Income scheme, and any other income. (This is total B).

STEP THREE

- (i) Deduct the net weekly income while in full-time employment (Total B) from the combined total of the net income while on benefit and the \$20.00 margin (Total A).
- (ii) The balance is the amount of Allowance payable per week, subject to a maximum payment of \$40.00 per week.

Example

Solo parent with 1 child earning \$70.00 per week gross while on benefit (based on restructured April 1986 benefit rates).

ON BENEFIT

	\$	
Benefit (abated on account of income)	153.18	NOTE: Assessment rates are all 'Net' figures for benefit amounts.
Family Support (1 child)	+ 36.00	
Net Earnings (G tax code)	<u>+ 59.65</u>	
	=248.83	
Add \$20.00	<u>+ 20.00</u>	
This is Total A	<u>=268.83</u>	

Transition to Work Allowance (Cont.)

IN WORK

	<u>Example 1</u>	<u>Example 2</u>
	\$	\$
Gross Pay	265.00	250.00
Net Pay (*G code)	213.21	202.71
Add Family Support/GMFI	<u>+ 36.00*</u>	<u>+ 41.29*</u>
This is Total B	=249.21	=244.00
Total A	268.83	268.83
Deduct Total B	<u>-249.21</u>	<u>-244.00</u>
Allowance Payable	<u>= 19.62</u>	<u>= 24.83</u>

\* If the applicant does not know the amount of Family Support/GMFI to which he/she is entitled it may be necessary for the amount to be obtained from the Inland Revenue Department.. Districts can use their nominated liaison officer for this purpose.

Advise applicant of out come of application and attach papers to parent benefit file.

# APPLICATION FOR TRANSITION TO WORK ALLOWANCE

Number:.....
FP:.....
Index:.....

## PERSONAL DETAILS

Full Name: KRYSTLE DALLAS EVANS  
Full Address: 209A THE BOULEVARD  
MANCAWEKA  
Type of benefit: WIDOWS Benefit Number: 000-579-999

## EMPLOYMENT DETAILS

Name of employer: MANCAWEKA MUSH ROOM FARM  
Address of employer: FAIRSDOWN ROAD MANCAWEKA  
Employer's telephone number: 672-2063  
Date of commencement of employment: 29/09/86 Is employment permanent? (1) YES  NO   
If "NO", how long is employment for? ..... years ..... months  
What are the hours worked per week? 32  
What will your gross pay be per week? £ 101.79  
What will your net pay be per week? £ 95.36  
What rate of Family Support are you and/or your spouse receiving per week? £ 36.00

## METHOD OF PAYMENT

There are 2 options listed below. Please tick (✓) the box next to the option that describes how you want to be paid.

- Option 1  Regular fortnightly or weekly payments of your Allowance for 13 weeks; or  
Option 2  A full lump sum payment of your 13 weeks Allowance.

## DECLARATION

The statements and answers in this application are to the best of my knowledge true and correct.

Applicant's signature

Kristle Evans

Date: 16.1.10\*\*

## TRANSITION TO WORK ALLOWANCE CALCULATION SHEET

STEP 1 Calculate net weekly income while on benefit.

Total net benefit	\$ <u>109.10</u>	(includes Family Support)
Add net earnings	+ \$ <u>27.00</u>	
Add any other income	+ \$ <u>00.00</u>	(e.g. Interest, Dividends, Rent received)
This is Total A	= \$ <u>129.10</u>	

---

STEP 2 Calculate net weekly income while in full-time employment.

Gross Pay	\$ <u>101.79</u>	
Calculate net pay	\$ <u>95.36</u>	(use PAYE tables if this is not supplied)
Add Family Support/GMFI	+ \$ <u>36.00</u>	
Add any other income	+ \$ <u>00.00</u>	(e.g. Interest, Dividends, Rent received)
This is Total B	= \$ <u>131.36</u>	

---

STEP 3 Calculate the Allowance payable per week.

Total A	\$ <u>129.10</u>	
Add \$20.00	+ \$ <u>20.00</u>	
	= \$ <u>149.10</u>	
Deduct Total B	- \$ <u>131.36</u>	
Allowance Payable	= \$ <u>17.74</u>	(not to exceed \$40.00 a week)

Multiply this amount or \$40.00 a week, whichever is the lesser, by 13 to give the total lump sum payable.



**CHARGING EARNINGS**

# HOW TO CHARGE EARNINGS

## INTRODUCTION

Reference: E1 Miscellaneous  
Provisions Manual  
CM 1986/163

When we talk of earnings we mean the likes of wages and salary from some type of employment.

Of course earnings are included as income. Remember that if income exceeds the income exemption benefit payments will be affected.



Adjusting the earnings with the maximum benefit payable is usually termed bringing the earnings to charge.

## CHARGING EARNINGS AT GRANT OF BENEFIT

- (a) If the applicant has ceased employment at application then the earnings received in the period prior to grant are to be disregarded.
- (b) Usually no problems if earnings are to continue ...

Here is a common example:

Applicant earns a static \$63.00 p.w. and intends to continue working.

\$63.00 x 52\* weeks = \$3,276.00. This amount is the proposed annual earnings income. The amount then forms part of the chargeable income and benefit assessment would start off like this:

### 1. Widow Without Dependant Children

Earnings	3276.00
Other Chargeable	
Income (say)	15.00
Total Chargeable	3291.00
Income	
Less Income	<u>-2600.00</u>
Exemption	
Excess	691.00

### 2. Widow With Dependent Children

3276.00
<u>15.00</u>
3291.00
<u>-3120.00</u>
171.00
And so on

N.B: 1. This is termed rating or prospectively charging the earnings, i.e. charging them at the current rate.

2. Watch where employed for only part of the year, e.g. part-time teachers - assessment maybe earnings x 40 weeks instead of x 52.

#### CHARGING EARNINGS AT GRANT OF BENEFIT (continued)

- (c) If it is not possible to estimate the prospective income for the 52 weeks following grant of benefit because the earnings are of a casual nature or irregular, the earnings received in the period of 52 weeks preceding grant (actual earnings) may be charged.

#### CHARGING EARNINGS AT RENEWAL

- (a) As a general rule actual earnings received in the relevant income year should be charged, and any earnings received during a period of suspension of benefit to be disregarded. Special rules apply to earnings prior to grant at first renewal depending on whether the earnings are continuing - see a senior officer about what to charge.
- (b) If the beneficiary intends to continue employment for an indefinite period and the actual earnings do not cover a full 52 week period, because the beneficiary commenced employment during the year, then prospective earnings may be charged.
- (c) If the rate of earnings are at a disqualifying rate then prospective earnings should be charged.
- (d) There will be cases when because of ill health or other good reason, a beneficiary may be unable to continue in employment. In such cases the Director may renew the benefit disregarding past earnings. This may apply even though a similar concession may have been approved at grant of benefit or some subsequent date. However, any second or subsequent application for the concession should be approved only when the Director is satisfied that the beneficiary's stated intentions regarding future employment are genuine.

#### COMMENCEMENT OF EMPLOYMENT DURING BENEFIT YEAR

Commencement of employment during the benefit year constitutes a change of circumstances and there is authority in Section 81 of the Social Security Act to review the rate of benefit.

#### BENEFICIARY NOTIFIES COMMENCEMENT OF EMPLOYMENT

When a beneficiary notifies that employment has commenced there is in many cases uncertainty as to the period of employment, or employment predictions may not eventuate and it may be difficult to give advice as to what action is to the beneficiary's best financial advantage.

Least problems arise when a benefit is reduced or suspended during a period of employment, and is paid at maximum rate when employment ceases. Most cases there fore fall into the (a) and (b) categories below in the first instance and if appropriate final adjustment is made at the following renewal.

#### OPTIONS AVAILABLE

- (a) Suspend payment from first available date.
- (b) Charge prospective annual income from first available date.

#### OPTIONS AVAILABLE (continued)

- (c) If the beneficiary wishes to earn up to the income exemption and then to cease employment, actual earnings may be charged from the following renewal.
- (d) If the earnings are irregular or of a casual nature and an annual prospective income cannot be determined then actual earnings may be charged at the following renewal.
- (e) If the renewal of benefit is impending then prospective annual income may be charged at renewal.

#### ACTION AT RENEWAL

When benefit is reduced during the year because of the prospective earnings charge or suspended, particular care will be required at the following renewal to ensure that the beneficiary has not been financially disadvantaged because of the section 81 review. The following is therefore to apply.

The actual earnings and other income are to be ascertained for the period from grant or renewal of benefit, including any period during which the benefit was suspended, to the end of the benefit year, and a re-assessment made to determine the rate of benefit that would be payable if the actual income was charged in the year of receipt. The annual rate arrived at is then to be compared with the benefit payments made in the same period.

If the re-assessment provides for more benefit than that which has been paid, the benefit should be reviewed retrospective from grant or previous renewal and an arrears payment made.

If the re-assessment is not to the financial advantage of the beneficiary no adjustment in payment will be required.

#### EMPLOYMENT CEASES

When the benefit has been suspended and subsequently the beneficiary ceases employment then the benefit is to be resumed at the pre-suspension rate plus adjustments on account of statutory increases.

When earnings have been charged on a prospective basis; then on cessation of employment the benefit may be reviewed to disregard the earnings from the day following cessation of holiday pay.

If the beneficiary is absent from work for more than seven days because of temporary incapacity then the benefit may be reviewed to disregard the earnings for the period of incapacity for which no earnings are received. A medical certificate may be requested if there is no other evidence of incapacity.

#### ADVICE TO BENEFICIARIES REGARDING EFFECT OF EARNINGS ON BENEFIT

The most important issue concerning the effect of earnings on benefit, is that correct advice is given to the public.

ADVICE TO BENEFICIARIES REGARDING EFFECT OF EARNINGS ON BENEFIT  
(continued)

A common misconception is that the benefit income exemption is an earnings exemption, whereas it relates to all gross, before tax, income received. Those beneficiaries who signify an intention to work and earn up to the exemption should be left in no doubt that gross earnings and other gross income is taken into account.

The various options open should also be explained, and in the case of suspension of benefit the person concerned should be assured that earnings received during the period of suspension will be disregarded.

ACCOMMODATION BENEFIT

When advice is received concerning earnings, it should not be overlooked that although widows benefit may not be effected, any accommodation benefit may require review, because of the different exemptions apply to the latter.

(See Part C.S.A. Manual.)

CHILD CARE COSTS - SPECIAL EXEMPTION

Similarly it should not be overlooked that when calculating the earnings of a solo parent beneficiary there is a special exemption which is set out in the proviso to clause 2 of the Third Schedule. In terms of the provision the amount of personal earnings of a beneficiary may be reduced by \$20 a week, where the beneficiary's child or children are placed in a day care centre, or other approved placement while she is employed.

DEDUCTION TABLES FOR EXCESS INCOME — ANNUAL ASSESSMENTS — EFFECTIVE FROM 1.10.1986

CHILDREN INCLUDED — EXEMPTION \$3120.00 PER ANNUM  
 DEDUCTION = 0.30 CENTS PER \$1.00 OVER \$3120.00 PER ANNUM TO \$4160.00 PER ANNUM  
 = 0.70 CENTS PER \$1.00 IN EXCESS OF \$4160.00 PER ANNUM

WITHOUT CHILDREN — EXEMPTION \$2600.00 PER ANNUM  
 DEDUCTION = 0.30 CENTS PER \$1.00 OVER \$2600.00 PER ANNUM TO \$4160.00 PER ANNUM  
 = 0.70 CENTS PER \$1.00 IN EXCESS OF \$4160.00 PER ANNUM

1025AJ-6,000/85AM

DEDUCTION AT 0.30 CENTS PER \$1.00 FOR BROKEN AMOUNTS FROM \$1.00 TO \$99.00				DEDUCTION AT 0.30 CENTS PER \$1.00 AT \$100.00 RESTS UP TO \$1560.00 FOR BENEFICIARIES WITHOUT CHILDREN UP TO \$1040.00 FOR BENEFICIARIES WITH CHILDREN			DEDUCTION AT 0.70 CENTS PER \$1.00 FOR BROKEN AMOUNTS FROM \$1.00 TO \$99.00			
EXCESS INCOME	DEDUCTION	EXCESS INCOME	DEDUCTION	EXCESS INCOME	DEDUCTION WITHOUT CHILDREN	DEDUCTION CHILDREN INCLUDED	EXCESS INCOME	DEDUCTION	EXCESS INCOME	DEDUCTION
\$ 1.00	\$ 0.30	\$51.00	\$15.30	\$ 100.00	\$ 30.00	\$ 30.00	\$ 1.00	\$ 0.70	\$51.00	\$35.70
\$ 2.00	\$ 0.60	\$52.00	\$15.60	\$ 200.00	\$ 60.00	\$ 60.00	\$ 2.00	\$ 1.40	\$52.00	\$36.40
\$ 3.00	\$ 0.90	\$53.00	\$15.90	\$ 300.00	\$ 90.00	\$ 90.00	\$ 3.00	\$ 2.10	\$53.00	\$37.10
\$ 4.00	\$ 1.20	\$54.00	\$16.20	\$ 400.00	\$ 120.00	\$ 120.00	\$ 4.00	\$ 2.80	\$54.00	\$37.80
\$ 5.00	\$ 1.50	\$55.00	\$16.50	\$ 500.00	\$ 150.00	\$ 150.00	\$ 5.00	\$ 3.50	\$55.00	\$38.50
\$ 6.00	\$ 1.80	\$56.00	\$16.80	\$ 600.00	\$ 180.00	\$ 180.00	\$ 6.00	\$ 4.20	\$56.00	\$39.20
\$ 7.00	\$ 2.10	\$57.00	\$17.10	\$ 700.00	\$ 210.00	\$ 210.00	\$ 7.00	\$ 4.90	\$57.00	\$39.90
\$ 8.00	\$ 2.40	\$58.00	\$17.40	\$ 800.00	\$ 240.00	\$ 240.00	\$ 8.00	\$ 5.60	\$58.00	\$40.60
\$ 9.00	\$ 2.70	\$59.00	\$17.70	\$ 900.00	\$ 270.00	\$ 270.00	\$ 9.00	\$ 6.30	\$59.00	\$41.30
\$10.00	\$ 3.00	\$60.00	\$18.00	\$1000.00	\$ 300.00	\$ 300.00	\$10.00	\$ 7.00	\$60.00	\$42.00
\$11.00	\$ 3.30	\$61.00	\$18.30	\$1040.00		\$ 312.00	\$11.00	\$ 7.70	\$61.00	\$42.70
\$12.00	\$ 3.60	\$62.00	\$18.60				\$12.00	\$ 8.40	\$62.00	\$43.40
\$13.00	\$ 3.90	\$63.00	\$18.90	\$1100.00	\$ 330.00		\$13.00	\$ 9.10	\$63.00	\$44.10
\$14.00	\$ 4.20	\$64.00	\$19.20	\$1200.00	\$ 360.00		\$14.00	\$ 9.80	\$64.00	\$44.80
\$15.00	\$ 4.50	\$65.00	\$19.50	\$1300.00	\$ 390.00		\$15.00	\$10.50	\$65.00	\$45.50
\$16.00	\$ 4.80	\$66.00	\$19.80	\$1400.00	\$ 420.00		\$16.00	\$11.20	\$66.00	\$46.20
\$17.00	\$ 5.10	\$67.00	\$20.10	\$1500.00	\$ 450.00		\$17.00	\$11.90	\$67.00	\$46.90
\$18.00	\$ 5.40	\$68.00	\$20.40	\$1560.00	\$ 468.00		\$18.00	\$12.60	\$68.00	\$47.60
\$19.00	\$ 5.70	\$69.00	\$20.70				\$19.00	\$13.30	\$69.00	\$48.30
\$20.00	\$ 6.00	\$70.00	\$21.00				\$20.00	\$14.00	\$70.00	\$49.00
\$21.00	\$ 6.30	\$71.00	\$21.30				\$21.00	\$14.70	\$71.00	\$49.70
\$22.00	\$ 6.60	\$72.00	\$21.60				\$22.00	\$15.40	\$72.00	\$50.40
\$23.00	\$ 6.90	\$73.00	\$21.90				\$23.00	\$16.10	\$73.00	\$51.10
\$24.00	\$ 7.20	\$74.00	\$22.20				\$24.00	\$16.80	\$74.00	\$51.80
\$25.00	\$ 7.50	\$75.00	\$22.50				\$25.00	\$17.50	\$75.00	\$52.50
\$26.00	\$ 7.80	\$76.00	\$22.80				\$26.00	\$18.20	\$76.00	\$53.20
\$27.00	\$ 8.10	\$77.00	\$23.10				\$27.00	\$18.90	\$77.00	\$53.90
\$28.00	\$ 8.40	\$78.00	\$23.40				\$28.00	\$19.60	\$78.00	\$54.60
\$29.00	\$ 8.70	\$79.00	\$23.70	\$1100.00		\$ 354.00	\$29.00	\$20.30	\$79.00	\$55.30
\$30.00	\$ 9.00	\$80.00	\$24.00	\$1200.00		\$ 424.00	\$30.00	\$21.00	\$80.00	\$56.00
\$31.00	\$ 9.30	\$81.00	\$24.30	\$1300.00		\$ 494.00	\$31.00	\$21.70	\$81.00	\$56.70
\$32.00	\$ 9.60	\$82.00	\$24.60	\$1400.00		\$ 564.00	\$32.00	\$22.40	\$82.00	\$57.40
\$33.00	\$ 9.90	\$83.00	\$24.90	\$1500.00		\$ 634.00	\$33.00	\$23.10	\$83.00	\$58.10
\$34.00	\$10.20	\$84.00	\$25.20	\$1600.00	\$ 496.00	\$ 704.00	\$34.00	\$23.80	\$84.00	\$58.80
\$35.00	\$10.50	\$85.00	\$25.50	\$1700.00	\$ 566.00	\$ 774.00	\$35.00	\$24.50	\$85.00	\$59.50
\$36.00	\$10.80	\$86.00	\$25.80	\$1800.00	\$ 636.00	\$ 844.00	\$36.00	\$25.20	\$86.00	\$60.20
\$37.00	\$11.10	\$87.00	\$26.10	\$1900.00	\$ 706.00	\$ 914.00	\$37.00	\$25.90	\$87.00	\$60.90
\$38.00	\$11.40	\$88.00	\$26.40	\$2000.00	\$ 776.00	\$ 984.00	\$38.00	\$26.60	\$88.00	\$61.60
\$39.00	\$11.70	\$89.00	\$26.70	\$2100.00	\$ 846.00	\$1054.00	\$39.00	\$27.30	\$89.00	\$62.30
\$40.00	\$12.00	\$90.00	\$27.00	\$2200.00	\$ 916.00	\$1124.00	\$40.00	\$28.00	\$90.00	\$63.00
\$41.00	\$12.30	\$91.00	\$27.30	\$2300.00	\$ 986.00	\$1194.00	\$41.00	\$28.70	\$91.00	\$63.70
\$42.00	\$12.60	\$92.00	\$27.60	\$2400.00	\$1056.00	\$1264.00	\$42.00	\$29.40	\$92.00	\$64.40
\$43.00	\$12.90	\$93.00	\$27.90	\$2500.00	\$1126.00	\$1334.00	\$43.00	\$30.10	\$93.00	\$65.10
\$44.00	\$13.20	\$94.00	\$28.20	\$2600.00	\$1196.00	\$1404.00	\$44.00	\$30.80	\$94.00	\$65.80
\$45.00	\$13.50	\$95.00	\$28.50	\$2700.00	\$1266.00	\$1474.00	\$45.00	\$31.50	\$95.00	\$66.50
\$46.00	\$13.80	\$96.00	\$28.80	\$2800.00	\$1336.00	\$1544.00	\$46.00	\$32.20	\$96.00	\$67.20
\$47.00	\$14.10	\$97.00	\$29.10	\$2900.00	\$1406.00	\$1614.00	\$47.00	\$32.90	\$97.00	\$67.90
\$48.00	\$14.40	\$98.00	\$29.40	\$3000.00	\$1476.00	\$1684.00	\$48.00	\$33.60	\$98.00	\$68.60
\$49.00	\$14.70	\$99.00	\$29.70	\$3100.00	\$1546.00	\$1754.00	\$49.00	\$34.30	\$99.00	\$69.30
\$50.00	\$15.00	\$30.00		\$3200.00	\$1616.00	\$1824.00				
				\$3300.00	\$1686.00	\$1894.00				

EXCESS INCOME	DEDUCTION WITHOUT CHILDREN	DEDUCTION CHILDREN INCLUDED	EXCESS INCOME	DEDUCTION WITHOUT CHILDREN	DEDUCTION CHILDREN INCLUDED	EXCESS INCOME	DEDUCTION WITHOUT CHILDREN	DEDUCTION CHILDREN INCLUDED	EXCESS INCOME	DEDUCTION WITHOUT CHILDREN	DEDUCTION CHILDREN INCLUDED
\$3400.00	\$1756.00	\$1964.00	\$ 9100.00	\$5746.00	\$5954.00	\$14800.00	\$ 9736.00	\$ 9944.00	\$20500.00	\$13726.00	\$13934.00
\$3500.00	\$1826.00	\$2034.00	\$ 9200.00	\$5816.00	\$6024.00	\$14900.00	\$ 9806.00	\$10014.00	\$20600.00	\$13796.00	\$14004.00
\$3600.00	\$1896.00	\$2104.00	\$ 9300.00	\$5886.00	\$6094.00	\$15000.00	\$ 9876.00	\$10084.00	\$20700.00	\$13866.00	\$14074.00
\$3700.00	\$1966.00	\$2174.00	\$ 9400.00	\$5956.00	\$6164.00	\$15100.00	\$ 9946.00	\$10154.00	\$20800.00	\$13936.00	\$14144.00
\$3800.00	\$2036.00	\$2244.00	\$ 9500.00	\$6026.00	\$6234.00	\$15200.00	\$10016.00	\$10224.00	\$20900.00	\$14006.00	\$14214.00
\$3900.00	\$2106.00	\$2314.00	\$ 9600.00	\$6096.00	\$6304.00	\$15300.00	\$10086.00	\$10294.00	\$21000.00	\$14076.00	\$14284.00
\$4000.00	\$2176.00	\$2384.00	\$ 9700.00	\$6166.00	\$6374.00	\$15400.00	\$10156.00	\$10364.00	\$21100.00	\$14146.00	\$14354.00
\$4100.00	\$2246.00	\$2454.00	\$ 9800.00	\$6236.00	\$6444.00	\$15500.00	\$10226.00	\$10434.00	\$21200.00	\$14216.00	\$14424.00
\$4200.00	\$2316.00	\$2524.00	\$ 9900.00	\$6306.00	\$6514.00	\$15600.00	\$10296.00	\$10504.00	\$21300.00	\$14286.00	\$14494.00
\$4300.00	\$2386.00	\$2594.00	\$10000.00	\$6376.00	\$6584.00	\$15700.00	\$10366.00	\$10574.00	\$21400.00	\$14356.00	\$14564.00
\$4400.00	\$2456.00	\$2664.00	\$10100.00	\$6446.00	\$6654.00	\$15800.00	\$10436.00	\$10644.00	\$21500.00	\$14426.00	\$14634.00
\$4500.00	\$2526.00	\$2734.00	\$10200.00	\$6516.00	\$6724.00	\$15900.00	\$10506.00	\$10714.00	\$21600.00	\$14496.00	\$14704.00
\$4600.00	\$2596.00	\$2804.00	\$10300.00	\$6586.00	\$6794.00	\$16000.00	\$10576.00	\$10784.00	\$21700.00	\$14566.00	\$14774.00
\$4700.00	\$2666.00	\$2874.00	\$10400.00	\$6656.00	\$6864.00	\$16100.00	\$10646.00	\$10854.00	\$21800.00	\$14636.00	\$14844.00
\$4800.00	\$2736.00	\$2944.00	\$10500.00	\$6726.00	\$6934.00	\$16200.00	\$10716.00	\$10924.00	\$21900.00	\$14706.00	\$14914.00
\$4900.00	\$2806.00	\$3014.00	\$10600.00	\$6796.00	\$7004.00	\$16300.00	\$10786.00	\$10994.00	\$22000.00	\$14776.00	\$14984.00
\$5000.00	\$2876.00	\$3084.00	\$10700.00	\$6866.00	\$7074.00	\$16400.00	\$10856.00	\$11064.00	\$22100.00	\$14846.00	\$15054.00
\$5100.00	\$2946.00	\$3154.00	\$10800.00	\$6936.00	\$7144.00	\$16500.00	\$10926.00	\$11134.00	\$22200.00	\$14916.00	\$15124.00
\$5200.00	\$3016.00	\$3224.00	\$10900.00	\$7006.00	\$7214.00	\$16600.00	\$10996.00	\$11204.00	\$22300.00	\$14986.00	\$15194.00
\$5300.00	\$3086.00	\$3294.00	\$11000.00	\$7076.00	\$7284.00	\$16700.00	\$11066.00	\$11274.00	\$22400.00	\$15056.00	\$15264.00
\$5400.00	\$3156.00	\$3364.00	\$11100.00	\$7146.00	\$7354.00	\$16800.00	\$11136.00	\$11344.00	\$22500.00	\$15126.00	\$15334.00
\$5500.00	\$3226.00	\$3434.00	\$11200.00	\$7216.00	\$7424.00	\$16900.00	\$11206.00	\$11414.00	\$22600.00	\$15196.00	\$15404.00
\$5600.00	\$3296.00	\$3504.00	\$11300.00	\$7286.00	\$7494.00	\$17000.00	\$11276.00	\$11484.00	\$22700.00	\$15266.00	\$15474.00
\$5700.00	\$3366.00	\$3574.00	\$11400.00	\$7356.00	\$7564.00	\$17100.00	\$11346.00	\$11554.00	\$22800.00	\$15336.00	\$15544.00
\$5800.00	\$3436.00	\$3644.00	\$11500.00	\$7426.00	\$7634.00	\$17200.00	\$11416.00	\$11624.00	\$22900.00	\$15406.00	\$15614.00
\$5900.00	\$3506.00	\$3714.00	\$11600.00	\$7496.00	\$7704.00	\$17300.00	\$11486.00	\$11694.00	\$23000.00	\$15476.00	\$15684.00
\$6000.00	\$3576.00	\$3784.00	\$11700.00	\$7566.00	\$7774.00	\$17400.00	\$11556.00	\$11764.00	\$23100.00	\$15546.00	\$15754.00
\$6100.00	\$3646.00	\$3854.00	\$11800.00	\$7636.00	\$7844.00	\$17500.00	\$11626.00	\$11834.00	\$23200.00	\$15616.00	\$15824.00
\$6200.00	\$3716.00	\$3924.00	\$11900.00	\$7706.00	\$7914.00	\$17600.00	\$11696.00	\$11904.00	\$23300.00	\$15686.00	\$15894.00
\$6300.00	\$3786.00	\$3994.00	\$12000.00	\$7776.00	\$7984.00	\$17700.00	\$11766.00	\$11974.00	\$23400.00	\$15756.00	\$15964.00
\$6400.00	\$3856.00	\$4064.00	\$12100.00	\$7846.00	\$8054.00	\$17800.00	\$11836.00	\$12044.00	\$23500.00	\$15826.00	\$16034.00
\$6500.00	\$3926.00	\$4134.00	\$12200.00	\$7916.00	\$8124.00	\$17900.00	\$11906.00	\$12114.00	\$23600.00	\$15896.00	\$16104.00
\$6600.00	\$3996.00	\$4204.00	\$12300.00	\$7986.00	\$8194.00	\$18000.00	\$11976.00	\$12184.00	\$23700.00	\$15966.00	\$16174.00
\$6700.00	\$4066.00	\$4274.00	\$12400.00	\$8056.00	\$8264.00	\$18100.00	\$12046.00	\$12254.00	\$23800.00	\$16036.00	\$16244.00
\$6800.00	\$4136.00	\$4344.00	\$12500.00	\$8126.00	\$8334.00	\$18200.00	\$12116.00	\$12324.00	\$23900.00	\$16106.00	\$16314.00
\$6900.00	\$4206.00	\$4414.00	\$12600.00	\$8196.00	\$8404.00	\$18300.00	\$12186.00	\$12394.00	\$24000.00	\$16176.00	\$16384.00
\$7000.00	\$4276.00	\$4484.00	\$12700.00	\$8266.00	\$8474.00	\$18400.00	\$12256.00	\$12464.00	\$24100.00	\$16246.00	\$16454.00
\$7100.00	\$4346.00	\$4554.00	\$12800.00	\$8336.00	\$8544.00	\$18500.00	\$12326.00	\$12534.00	\$24200.00	\$16316.00	\$16524.00
\$7200.00	\$4416.00	\$4624.00	\$12900.00	\$8406.00	\$8614.00	\$18600.00	\$12396.00	\$12604.00	\$24300.00	\$16386.00	\$16594.00
\$7300.00	\$4486.00	\$4694.00	\$13000.00	\$8476.00	\$8684.00	\$18700.00	\$12466.00	\$12674.00	\$24400.00	\$16456.00	\$16664.00
\$7400.00	\$4556.00	\$4764.00	\$13100.00	\$8546.00	\$8754.00	\$18800.00	\$12536.00	\$12744.00	\$24500.00	\$16526.00	\$16734.00
\$7500.00	\$4626.00	\$4834.00	\$13200.00	\$8616.00	\$8824.00	\$18900.00	\$12606.00	\$12814.00	\$24600.00	\$16596.00	\$16804.00
\$7600.00	\$4696.00	\$4904.00	\$13300.00	\$8686.00	\$8894.00	\$19000.00	\$12676.00	\$12884.00	\$24700.00	\$16666.00	\$16874.00
\$7700.00	\$4766.00	\$4974.00	\$13400.00	\$8756.00	\$8964.00	\$19100.00	\$12746.00	\$12954.00	\$24800.00	\$16736.00	\$16944.00
\$7800.00	\$4836.00	\$5044.00	\$13500.00	\$8826.00	\$9034.00	\$19200.00	\$12816.00	\$13024.00	\$24900.00	\$16806.00	\$17014.00
\$7900.00	\$4906.00	\$5114.00	\$13600.00	\$8896.00	\$9104.00	\$19300.00	\$12886.00	\$13094.00	\$25000.00	\$16876.00	\$17084.00
\$8000.00	\$4976.00	\$5184.00	\$13700.00	\$8966.00	\$9174.00	\$19400.00	\$12956.00	\$13164.00	\$25100.00	\$16946.00	\$17154.00
\$8100.00	\$5046.00	\$5254.00	\$13800.00	\$9036.00	\$9244.00	\$19500.00	\$13026.00	\$13234.00	\$25200.00	\$17016.00	\$17224.00
\$8200.00	\$5116.00	\$5324.00	\$13900.00	\$9106.00	\$9314.00	\$19600.00	\$13096.00	\$13304.00	\$25300.00	\$17086.00	\$17294.00
\$8300.00	\$5186.00	\$5394.00	\$14000.00	\$9176.00	\$9384.00	\$19700.00	\$13166.00	\$13374.00	\$25400.00	\$17156.00	\$17364.00
\$8400.00	\$5256.00	\$5464.00	\$14100.00	\$9246.00	\$9454.00	\$19800.00	\$13236.00	\$13444.00	\$25500.00	\$17226.00	\$17434.00
\$8500.00	\$5326.00	\$5534.00	\$14200.00	\$9316.00	\$9524.00	\$19900.00	\$13306.00	\$13514.00	\$25600.00	\$17296.00	\$17504.00
\$8600.00	\$5396.00	\$5604.00	\$14300.00	\$9386.00	\$9594.00	\$20000.00	\$13376.00	\$13584.00	\$25700.00	\$17366.00	\$17574.00
\$8700.00	\$5466.00	\$5674.00	\$14400.00	\$9456.00	\$9664.00	\$20100.00	\$13446.00	\$13654.00	\$25800.00	\$17436.00	\$17644.00
\$8800.00	\$5536.00	\$5744.00	\$14500.00	\$9526.00	\$9734.00	\$20200.00	\$13516.00	\$13724.00	\$25900.00	\$17506.00	\$17714.00
\$8900.00	\$5606.00	\$5814.00	\$14600.00	\$9596.00	\$9804.00	\$20300.00	\$13586.00	\$13794.00	\$26000.00	\$17576.00	\$17784.00
\$9000.00	\$5676.00	\$5884.00	\$14700.00	\$9666.00	\$9874.00	\$20400.00	\$13656.00	\$13864.00	\$26100.00	\$17646.00	\$17854.00

**DEDUCTION TABLES FOR EXCESS INCOME**  
**— WEEKLY ASSESSMENTS — EFFECTIVE FROM 1.10.1986**

CHILDREN INCLUDED	— EXEMPTION \$60.00 PER WEEK
DEDUCTION	= 0.30 CENTS PER \$1.00 OVER \$60.00 PER WEEK TO \$80.00 PER WEEK
	= 0.70 CENTS PER \$1.00 IN EXCESS OF \$80.00 PER WEEK

WITHOUT CHILDREN	— EXEMPTION \$50.00 PER WEEK
DEDUCTION	= 0.30 CENTS PER \$1.00 OVER \$50.00 PER WEEK TO \$80.00 PER WEEK
	= 0.70 CENTS PER \$1.00 IN EXCESS OF \$80.00 PER WEEK

EXCESS INCOME	DEDUCTION WITHOUT CHILDREN	DEDUCTION CHILDREN INCLUDED	EXCESS INCOME	DEDUCTION WITHOUT CHILDREN	DEDUCTION CHILDREN INCLUDED	EXCESS INCOME	DEDUCTION WITHOUT CHILDREN	DEDUCTION CHILDREN INCLUDED	EXCESS INCOME	DEDUCTION WITHOUT CHILDREN	DEDUCTION CHILDREN INCLUDED
\$1.00	\$0.30	\$0.30	\$46.00	\$20.20	\$24.20	\$91.00	\$51.70	\$55.70	\$136.00	\$83.20	\$87.20
\$2.00	\$0.60	\$0.60	\$47.00	\$20.90	\$24.90	\$92.00	\$52.40	\$56.40	\$137.00	\$83.90	\$87.90
\$3.00	\$0.90	\$0.90	\$48.00	\$21.60	\$25.60	\$93.00	\$53.10	\$57.10	\$138.00	\$84.60	\$88.60
\$4.00	\$1.20	\$1.20	\$49.00	\$22.30	\$26.30	\$94.00	\$53.80	\$57.80	\$139.00	\$85.30	\$89.30
\$5.00	\$1.50	\$1.50	\$50.00	\$23.00	\$27.00	\$95.00	\$54.50	\$58.50	\$140.00	\$86.00	\$90.00
\$6.00	\$1.80	\$1.80	\$51.00	\$23.70	\$27.70	\$96.00	\$55.20	\$59.20	\$141.00	\$86.70	\$90.70
\$7.00	\$2.10	\$2.10	\$52.00	\$24.40	\$28.40	\$97.00	\$55.90	\$59.90	\$142.00	\$87.40	\$91.40
\$8.00	\$2.40	\$2.40	\$53.00	\$25.10	\$29.10	\$98.00	\$56.60	\$60.60	\$143.00	\$88.10	\$92.10
\$9.00	\$2.70	\$2.70	\$54.00	\$25.80	\$29.80	\$99.00	\$57.30	\$61.30	\$144.00	\$88.80	\$92.80
\$10.00	\$3.00	\$3.00	\$55.00	\$26.50	\$30.50	\$100.00	\$58.00	\$62.00	\$145.00	\$89.50	\$93.50
\$11.00	\$3.30	\$3.30	\$56.00	\$27.20	\$31.20	\$101.00	\$58.70	\$62.70	\$146.00	\$90.20	\$94.20
\$12.00	\$3.60	\$3.60	\$57.00	\$27.90	\$31.90	\$102.00	\$59.40	\$63.40	\$147.00	\$90.90	\$94.90
\$13.00	\$3.90	\$3.90	\$58.00	\$28.60	\$32.60	\$103.00	\$60.10	\$64.10	\$148.00	\$91.60	\$95.60
\$14.00	\$4.20	\$4.20	\$59.00	\$29.30	\$33.30	\$104.00	\$60.80	\$64.80	\$149.00	\$92.30	\$96.30
\$15.00	\$4.50	\$4.50	\$60.00	\$30.00	\$34.00	\$105.00	\$61.50	\$65.50	\$150.00	\$93.00	\$97.00
\$16.00	\$4.80	\$4.80	\$61.00	\$30.70	\$34.70	\$106.00	\$62.20	\$66.20	\$151.00	\$93.70	\$97.70
\$17.00	\$5.10	\$5.10	\$62.00	\$31.40	\$35.40	\$107.00	\$62.90	\$66.90	\$152.00	\$94.40	\$98.40
\$18.00	\$5.40	\$5.40	\$63.00	\$32.10	\$36.10	\$108.00	\$63.60	\$67.60	\$153.00	\$95.10	\$99.10
\$19.00	\$5.70	\$5.70	\$64.00	\$32.80	\$36.80	\$109.00	\$64.30	\$68.30	\$154.00	\$95.80	\$99.80
\$20.00	\$6.00	\$6.00	\$65.00	\$33.50	\$37.50	\$110.00	\$65.00	\$69.00	\$155.00	\$96.50	\$100.50
\$21.00	\$6.30	\$6.70	\$66.00	\$34.20	\$38.20	\$111.00	\$65.70	\$69.70	\$156.00	\$97.20	\$101.20
\$22.00	\$6.60	\$7.40	\$67.00	\$34.90	\$38.90	\$112.00	\$66.40	\$70.40	\$157.00	\$97.90	\$101.90
\$23.00	\$6.90	\$8.10	\$68.00	\$35.60	\$39.60	\$113.00	\$67.10	\$71.10	\$158.00	\$98.60	\$102.60
\$24.00	\$7.20	\$8.80	\$69.00	\$36.30	\$40.30	\$114.00	\$67.80	\$71.80	\$159.00	\$99.30	\$103.30
\$25.00	\$7.50	\$9.50	\$70.00	\$37.00	\$41.00	\$115.00	\$68.50	\$72.50	\$160.00	\$100.00	\$104.00
\$26.00	\$7.80	\$10.20	\$71.00	\$37.70	\$41.70	\$116.00	\$69.20	\$73.20	\$161.00	\$100.70	\$104.70
\$27.00	\$8.10	\$10.90	\$72.00	\$38.40	\$42.40	\$117.00	\$69.90	\$73.90	\$162.00	\$101.40	\$105.40
\$28.00	\$8.40	\$11.60	\$73.00	\$39.10	\$43.10	\$118.00	\$70.60	\$74.60	\$163.00	\$102.10	\$106.10
\$29.00	\$8.70	\$12.30	\$74.00	\$39.80	\$43.80	\$119.00	\$71.30	\$75.30	\$164.00	\$102.80	\$106.80
\$30.00	\$9.00	\$13.00	\$75.00	\$40.50	\$44.50	\$120.00	\$72.00	\$76.00	\$165.00	\$103.50	\$107.50
\$31.00	\$9.70	\$13.70	\$76.00	\$41.20	\$45.20	\$121.00	\$72.70	\$76.70	\$166.00	\$104.20	\$108.20
\$32.00	\$10.40	\$14.40	\$77.00	\$41.90	\$45.90	\$122.00	\$73.40	\$77.40	\$167.00	\$104.90	\$108.90
\$33.00	\$11.10	\$15.10	\$78.00	\$42.60	\$46.60	\$123.00	\$74.10	\$78.10	\$168.00	\$105.60	\$109.60
\$34.00	\$11.80	\$15.80	\$79.00	\$43.30	\$47.30	\$124.00	\$74.80	\$78.80	\$169.00	\$106.30	\$110.30
\$35.00	\$12.50	\$16.50	\$80.00	\$44.00	\$48.00	\$125.00	\$75.50	\$79.50	\$170.00	\$107.00	\$111.00
\$36.00	\$13.20	\$17.20	\$81.00	\$44.70	\$48.70	\$126.00	\$76.20	\$80.20	\$171.00	\$107.70	\$111.70
\$37.00	\$13.90	\$17.90	\$82.00	\$45.40	\$49.40	\$127.00	\$76.90	\$80.90	\$172.00	\$108.40	\$112.40
\$38.00	\$14.60	\$18.60	\$83.00	\$46.10	\$50.10	\$128.00	\$77.60	\$81.60	\$173.00	\$109.10	\$113.10
\$39.00	\$15.30	\$19.30	\$84.00	\$46.80	\$50.80	\$129.00	\$78.30	\$82.30	\$174.00	\$109.80	\$113.80
\$40.00	\$16.00	\$20.00	\$85.00	\$47.50	\$51.50	\$130.00	\$79.00	\$83.00	\$175.00	\$110.50	\$114.50
\$41.00	\$16.70	\$20.70	\$86.00	\$48.20	\$52.20	\$131.00	\$79.70	\$83.70	\$176.00	\$111.20	\$115.20
\$42.00	\$17.40	\$21.40	\$87.00	\$48.90	\$52.90	\$132.00	\$80.40	\$84.40	\$177.00	\$111.90	\$115.90
\$43.00	\$18.10	\$22.10	\$88.00	\$49.60	\$53.60	\$133.00	\$81.10	\$85.10	\$178.00	\$112.60	\$116.60
\$44.00	\$18.80	\$22.80	\$89.00	\$50.30	\$54.30	\$134.00	\$81.80	\$85.80	\$179.00	\$113.30	\$117.30
\$45.00	\$19.50	\$23.50	\$90.00	\$51.00	\$55.00	\$135.00	\$82.50	\$86.50	\$180.00	\$114.00	\$118.00



EXCESS INCOME	DEDUCTION WITHOUT CHILDREN	DEDUCTION CHILDREN INCLUDED	EXCESS INCOME	DEDUCTION WITHOUT CHILDREN	DEDUCTION CHILDREN INCLUDED	EXCESS INCOME	DEDUCTION WITHOUT CHILDREN	DEDUCTION CHILDREN INCLUDED	EXCESS INCOME	DEDUCTION WITHOUT CHILDREN	DEDUCTION CHILDREN INCLUDED
\$181.00	\$114.70	\$118.70	\$236.00	\$153.20	\$157.20	\$291.00	\$191.70	\$195.70	\$346.00	\$230.20	\$234.20
\$182.00	\$115.40	\$119.40	\$237.00	\$153.90	\$157.90	\$292.00	\$192.40	\$196.40	\$347.00	\$230.90	\$234.90
\$183.00	\$116.10	\$120.10	\$238.00	\$154.60	\$158.60	\$293.00	\$193.10	\$197.10	\$348.00	\$231.60	\$235.60
\$184.00	\$116.80	\$120.80	\$239.00	\$155.30	\$159.30	\$294.00	\$193.80	\$197.80	\$349.00	\$232.30	\$236.30
\$185.00	\$117.50	\$121.50	\$240.00	\$156.00	\$160.00	\$295.00	\$194.50	\$198.50	\$350.00	\$233.00	\$237.00
\$186.00	\$118.20	\$122.20	\$241.00	\$156.70	\$160.70	\$296.00	\$195.20	\$199.20	\$351.00	\$233.70	\$237.70
\$187.00	\$118.90	\$122.90	\$242.00	\$157.40	\$161.40	\$297.00	\$195.90	\$199.90	\$352.00	\$234.40	\$238.40
\$188.00	\$119.60	\$123.60	\$243.00	\$158.10	\$162.10	\$298.00	\$196.60	\$200.60	\$353.00	\$235.10	\$239.10
\$189.00	\$120.30	\$124.30	\$244.00	\$158.80	\$162.80	\$299.00	\$197.30	\$201.30	\$354.00	\$235.80	\$239.80
\$190.00	\$121.00	\$125.00	\$245.00	\$159.50	\$163.50	\$300.00	\$198.00	\$202.00	\$355.00	\$236.50	\$240.50
\$191.00	\$121.70	\$125.70	\$246.00	\$160.20	\$164.20	\$301.00	\$198.70	\$202.70	\$356.00	\$237.20	\$241.20
\$192.00	\$122.40	\$126.40	\$247.00	\$160.90	\$164.90	\$302.00	\$199.40	\$203.40	\$357.00	\$237.90	\$241.90
\$193.00	\$123.10	\$127.10	\$248.00	\$161.60	\$165.60	\$303.00	\$200.10	\$204.10	\$358.00	\$238.60	\$242.60
\$194.00	\$123.80	\$127.80	\$249.00	\$162.30	\$166.30	\$304.00	\$200.80	\$204.80	\$359.00	\$239.30	\$243.30
\$195.00	\$124.50	\$128.50	\$250.00	\$163.00	\$167.00	\$305.00	\$201.50	\$205.50	\$360.00	\$240.00	\$244.00
\$196.00	\$125.20	\$129.20	\$251.00	\$163.70	\$167.70	\$306.00	\$202.20	\$206.20	\$361.00	\$240.70	\$244.70
\$197.00	\$125.90	\$129.90	\$252.00	\$164.40	\$168.40	\$307.00	\$202.90	\$206.90	\$362.00	\$241.40	\$245.40
\$198.00	\$126.60	\$130.60	\$253.00	\$165.10	\$169.10	\$308.00	\$203.60	\$207.60	\$363.00	\$242.10	\$246.10
\$199.00	\$127.30	\$131.30	\$254.00	\$165.80	\$169.80	\$309.00	\$204.30	\$208.30	\$364.00	\$242.80	\$246.80
\$200.00	\$128.00	\$132.00	\$255.00	\$166.50	\$170.50	\$310.00	\$205.00	\$209.00	\$365.00	\$243.50	\$247.50
\$201.00	\$128.70	\$132.70	\$256.00	\$167.20	\$171.20	\$311.00	\$205.70	\$209.70	\$366.00	\$244.20	\$248.20
\$202.00	\$129.40	\$133.40	\$257.00	\$167.90	\$171.90	\$312.00	\$206.40	\$210.40	\$367.00	\$244.90	\$248.90
\$203.00	\$130.10	\$134.10	\$258.00	\$168.60	\$172.60	\$313.00	\$207.10	\$211.10	\$368.00	\$245.60	\$249.60
\$204.00	\$130.80	\$134.80	\$259.00	\$169.30	\$173.30	\$314.00	\$207.80	\$211.80	\$369.00	\$246.30	\$250.30
\$205.00	\$131.50	\$135.50	\$260.00	\$170.00	\$174.00	\$315.00	\$208.50	\$212.50	\$370.00	\$247.00	\$251.00
\$206.00	\$132.20	\$136.20	\$261.00	\$170.70	\$174.70	\$316.00	\$209.20	\$213.20	\$371.00	\$247.70	\$251.70
\$207.00	\$132.90	\$136.90	\$262.00	\$171.40	\$175.40	\$317.00	\$209.90	\$213.90	\$372.00	\$248.40	\$252.40
\$208.00	\$133.60	\$137.60	\$263.00	\$172.10	\$176.10	\$318.00	\$210.60	\$214.60	\$373.00	\$249.10	\$253.10
\$209.00	\$134.30	\$138.30	\$264.00	\$172.80	\$176.80	\$319.00	\$211.30	\$215.30	\$374.00	\$249.80	\$253.80
\$210.00	\$135.00	\$139.00	\$265.00	\$173.50	\$177.50	\$320.00	\$212.00	\$216.00	\$375.00	\$250.50	\$254.50
\$211.00	\$135.70	\$139.70	\$266.00	\$174.20	\$178.20	\$321.00	\$212.70	\$216.70	\$376.00	\$251.20	\$255.20
\$212.00	\$136.40	\$140.40	\$267.00	\$174.90	\$178.90	\$322.00	\$213.40	\$217.40	\$377.00	\$251.90	\$255.90
\$213.00	\$137.10	\$141.10	\$268.00	\$175.60	\$179.60	\$323.00	\$214.10	\$218.10	\$378.00	\$252.60	\$256.60
\$214.00	\$137.80	\$141.80	\$269.00	\$176.30	\$180.30	\$324.00	\$214.80	\$218.80	\$379.00	\$253.30	\$257.30
\$215.00	\$138.50	\$142.50	\$270.00	\$177.00	\$181.00	\$325.00	\$215.50	\$219.50	\$380.00	\$254.00	\$258.00
\$216.00	\$139.20	\$143.20	\$271.00	\$177.70	\$181.70	\$326.00	\$216.20	\$220.20	\$381.00	\$254.70	\$258.70
\$217.00	\$139.90	\$143.90	\$272.00	\$178.40	\$182.40	\$327.00	\$216.90	\$220.90	\$382.00	\$255.40	\$259.40
\$218.00	\$140.60	\$144.60	\$273.00	\$179.10	\$183.10	\$328.00	\$217.60	\$221.60	\$383.00	\$256.10	\$260.10
\$219.00	\$141.30	\$145.30	\$274.00	\$179.80	\$183.80	\$329.00	\$218.30	\$222.30	\$384.00	\$256.80	\$260.80
\$220.00	\$142.00	\$146.00	\$275.00	\$180.50	\$184.50	\$330.00	\$219.00	\$223.00	\$385.00	\$257.50	\$261.50
\$221.00	\$142.70	\$146.70	\$276.00	\$181.20	\$185.20	\$331.00	\$219.70	\$223.70	\$386.00	\$258.20	\$262.20
\$222.00	\$143.40	\$147.40	\$277.00	\$181.90	\$185.90	\$332.00	\$220.40	\$224.40	\$387.00	\$258.90	\$262.90
\$223.00	\$144.10	\$148.10	\$278.00	\$182.60	\$186.60	\$333.00	\$221.10	\$225.10	\$388.00	\$259.60	\$263.60
\$224.00	\$144.80	\$148.80	\$279.00	\$183.30	\$187.30	\$334.00	\$221.80	\$225.80	\$389.00	\$260.30	\$264.30
\$225.00	\$145.50	\$149.50	\$280.00	\$184.00	\$188.00	\$335.00	\$222.50	\$226.50	\$390.00	\$261.00	\$265.00
\$226.00	\$146.20	\$150.20	\$281.00	\$184.70	\$188.70	\$336.00	\$223.20	\$227.20	\$391.00	\$261.70	\$265.70
\$227.00	\$146.90	\$150.90	\$282.00	\$185.40	\$189.40	\$337.00	\$223.90	\$227.90	\$392.00	\$262.40	\$266.40
\$228.00	\$147.60	\$151.60	\$283.00	\$186.10	\$190.10	\$338.00	\$224.60	\$228.60	\$393.00	\$263.10	\$267.10
\$229.00	\$148.30	\$152.30	\$284.00	\$186.80	\$190.80	\$339.00	\$225.30	\$229.30	\$394.00	\$263.80	\$267.80
\$230.00	\$149.00	\$153.00	\$285.00	\$187.50	\$191.50	\$340.00	\$226.00	\$230.00	\$395.00	\$264.50	\$268.50
\$231.00	\$149.70	\$153.70	\$286.00	\$188.20	\$192.20	\$341.00	\$226.70	\$230.70	\$396.00	\$265.20	\$269.20
\$232.00	\$150.40	\$154.40	\$287.00	\$188.90	\$192.90	\$342.00	\$227.40	\$231.40	\$397.00	\$265.90	\$269.90
\$233.00	\$151.10	\$155.10	\$288.00	\$189.60	\$193.60	\$343.00	\$228.10	\$232.10	\$398.00	\$266.60	\$270.60
\$234.00	\$151.80	\$155.80	\$289.00	\$190.30	\$194.30	\$344.00	\$228.80	\$232.80	\$399.00	\$267.30	\$271.30
\$235.00	\$152.50	\$156.50	\$290.00	\$191.00	\$195.00	\$345.00	\$229.50	\$233.50	\$400.00	\$268.00	\$272.00

Earnings (continued)

HERE IS AN EXAMPLE OF WHAT TO DO IF BENEFICIARY ADVISES THAT SHE IS STARTING WORK

1. Record details on the file (see next page)
  - commencement date
  - Employees name and address. If large organisation - Immediate bosses name.
  - Wage - will it vary?
  - Job she will be doing - Particular area of employment
  - Understanding of how earnings to be charged.
  - Remember the chart previous page



Ensure beneficiary not confused.

2. If beneficiary notifies by letter - you may be able to get the above information by phone - but Don't DELAY - record phone conversation on file.
3. Benefit in the example (next page) requires reduction from the first available date --- therefore
4. S.W. 747 to reduce. See example next page.
5. Also S.W. 8 must be issued to check the rate of earnings - If not returned prior to deadline for above action --- perhaps get details by phone (explain position to employer --- dont become a nuisance with frequent phone calls).

Points to note with S.W. 8 Completion:

- (i) If big organisation - show beneficiarys actual job and what division employed at.
  - (ii) The S.W. 8 is a multi-purpose form - Before issue delete questions not required.
  - (iii) See paras S.35 - S.38 Income and Property Manual.
6. Record review on form S.W. 23 see example next page.
    - (i) Remember other income like bank interest must also be brought to charge.
    - (ii) Watch if there are child care costs - add up to \$20.00 pw to the income exemption.
  7. Letter to beneficiary example page 136.
  8. Follow up S.W. 8 if necessary.
  9. Summary - (a) Details on file
    - (b) beneficiary understands
    - (c) S.W. 8
    - (d) S.W. 747
    - (e) S.W. 23
    - (f) Letter

Discuss with Senior Office if late notification received of earnings commencement. Review will depend on beneficiary's intentions and circumstances.

Examples next page.



S.W. 23

CERTIFICATE OF REVIEW

WIDOWS

Benefit

Class Code 030

3/729927

Beneficiary's name: WHATAFOA LUCY ADELIA  
(Surname) (Full First Name)

Address: 2001 MORAY PLACE, ST CLARE, DUNEDIN.  
Bank Account Number  Rat. Code

Review required on account of

Alm commenced part time work, at \$70.00 p.w. gross, on 24.08.77  
Revised assessment:  
 Earnings: \$3650.00 Benefit Rate: \$6820.22  
 P.O. Int: 15.00 Deduction: 316.50  
 TOTAL: 3665.00 Benefit Payable: 6503.82  
 Exemption: 2600.00 -\$250.16 per (Ebt.)  
 Excess: 1065.00  
 Deduction on account income: \$316.50

Overpayments, debts, or overlapping benefits to be adjusted: NIL

Decision:  
 1 Reduce Widow Benefit from 01-09-77 to \$6503.82  
 p.a.  
 2 amend master record  
 3 advise beneficiary

[Signature] 05.10.1977 Recommending Officer  
[Signature] 06.10.1977 Director

Stop cards instl. due 1/1 and 1/1  
 orders following:

INTERIM PAYMENT ORDERS

Appl. Code	Payment Code	Due Date	Amount	Appl. Code	Payment Code	Due Date	Amount
		/ /	\$			/ /	\$
		/ /	\$			/ /	\$
		/ /	\$			/ /	\$

Payee's Name: \_\_\_\_\_  
 Address: \_\_\_\_\_  
 Serial No.

Payment Order Bank Credit  Continuing Instalment Payment Order Bank Credit

Pay Computation  
 Checked \_\_\_\_\_  
 Input form \_\_\_\_\_  
 Form 3A/Letter \_\_\_\_\_  
 Debr. card \_\_\_\_\_  
 S.W. 6B \_\_\_\_\_  
 Index \_\_\_\_\_  
 FILE: \_\_\_\_\_

10042A-15,000 pads/12/83 MK

DEPARTMENT OF SOCIAL WELFARE

DISTRICT OFFICE: Area 143, Broadway 10th Floor, New York, N.Y.

Phone: 212-460-2777

THE EARNER  
3417 BROADWAY, NEW YORK, N.Y.  
3417 BROADWAY, NEW YORK, N.Y.

Reference to: SSN: 1-23-45678

Name: LUCY A. NIKITARDIA      Address: 3417 BROADWAY PLACE, NEW YORK, N.Y.

VERIFICATION OF EARNINGS

Read the instructions. All the information shown on this application for me or in return of a benefit, I should be signed if you would rather possession of earnings, income, by the State of New York.

Your Earnings: \$70.00

QUESTIONS

1) When a bar code the past twelve (12) months to the employer?  
 2) What are the dates worked, including the total number of days worked?  
 3) Do you have any other employment?  
 4) If so, what are the dates, hours and amount of earnings?  
 5) What sources of income are you receiving and the date of disbursement of each?  
 6) What property, investments, or other assets are you or will be paid, and how much?  
 7) If you have any other income or assets, please list them.  
 8) Do you have any other income or assets, please list them.  
 9) Do you have any other income or assets, please list them.

Date: 8.9.81      Signature: [Signature]

Example of letter - following earnings review

"As discussed with you it has been necessary to review your benefit on account of the earnings you are to receive. The 3rd schedule of the Social Security Act which sets out the rates of Widows Benefits requires that the benefit be reduced if the beneficiary's income exceeds \$2600.00 p.a. With your employment being an indefinite arrangement and earnings expected to be \$70.28 p.w. (\$3655.00 p.a.) the assessment of your benefit is as follows:

Earnings	\$3640.00	Benefit Rate	\$6820.32
Bank interest	\$ 15.00	Deduction	\$ 316.50
Total chargeable income	\$3655.00	on account	
Less exemption	\$2600.00	excess income	
Excess	\$1055.00		
Deduction on account		Benefit payable	
of excess income	\$ 316.50		\$6530.82
			(250.16 2 weeks)

Payments have been reduced from 1.9.81 and future 2 weekly instalments commencing from due date 8.9.81 will be at \$250.16. If you are dissatisfied with the decision above, you are entitled to have the decision reviewed by the Social Security Commission. If you wish to have the decision reviewed, you should apply in writing, within three months, setting out briefly the grounds on which you object to the decision. A form for this purpose is available from any office of this department (S.W. 143 - Application for Review of Decision)".

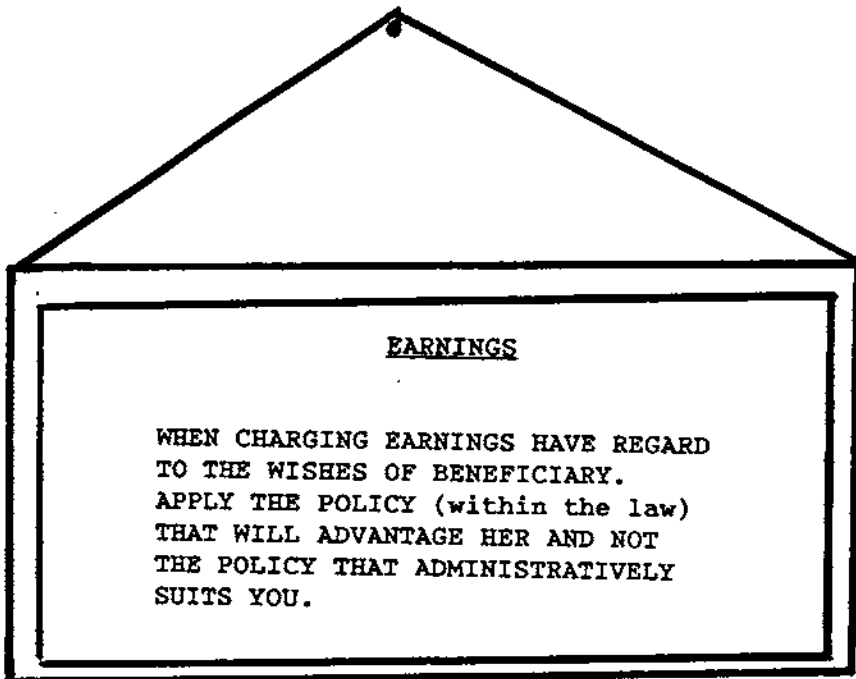
Earnings (continued)

6. EARNINGS - CHECK LIST

When reviewing benefit on account of earnings ensure the following has been covered:

1. Earnings prior to benefit grant disregarded, unless they are continuing uninterrupted since prior to grant then continue to charge rate (prospective) as first renewal.
2. Other income like BANK INTEREST may have to be added to the earnings to complete the income assessment.
3. ALTERNATIVES  
Explain the charging arrangements available  
Ask beneficiary if she understands the effect earnings will have on her benefit both now and at renewal.
4. Notification after the benefit review must be in writing and fully explain effect on benefit see example previous page.
5. Full or Part time employment. Don't bother to distinguish. We are only concerned with the rate of the earnings.
6. Verification must always be of GROSS earnings - It is this figure not the net that must be taken into account.
7. Remember
  - A. Child Care costs and employment. Up to \$20.00 p.w. may be added to the income exemption.
  - B. Input form. The master records chargeable income figure and check rate will probably require amendment.

# CHARGING EARNINGS



**ACCOMMODATION BENEFIT**



# ACCOMODATION BENEFIT

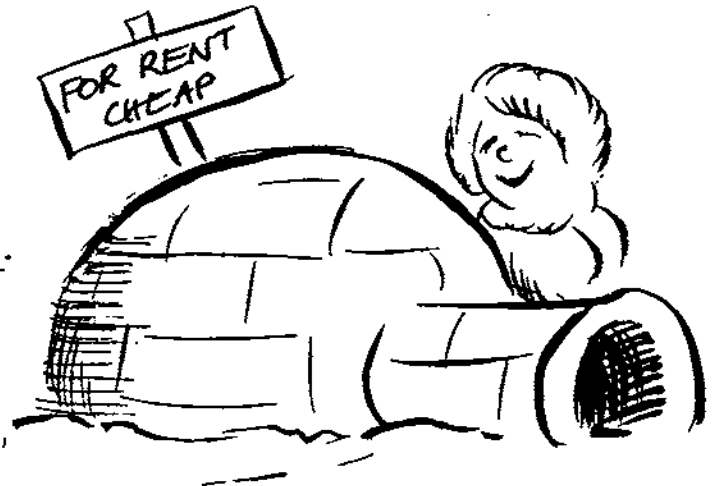
## Reference:

- Part C Supp Services Manual
- C.M. 1981/79
- Section 61E Social Security Act

## NOTE:

Prior to October 1981 this benefit was called ADDITIONAL BENEFIT Therefore some forms and file notes etc may still show the old name.

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## 1. PURPOSE

To assist with accommodation costs where beneficiaries income and cash assets are limited.

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## 2. WHAT DATE IS IT GRANTED FROM?

- A. New Widows Benefits (i) With dependent children  
After widows benefit has been current for four weeks.

If HARDSHIP EXISTS refer to Senior Officer. The 4 or 6 week waiting period may be waived.

- (ii) No dependent children  
After widows benefit has been current for six weeks.

- B. Existing Widows Benefits  
Date of eligibility or on the first day of the four weekly pay period in which the application is received whichever is the later.
- 

900F/81P

Amount of benefit next page.

3. AMOUNT

The maximum accommodation benefit payable is \$40.00 per week.

---

4. HOW TO ASSESS THE AMOUNT PAYABLE

(See example over page).

It is 2/3 of the amount by which accommodation costs exceed these figures.

- A. \$30.00 p.w. If pays rent or outgoings on own home.
  - B. \$35.00 p.w. No dependant children paying board.
  - C. \$58.00 p.w. Dependant children and pays board.
- 

5. EFFECT OF INCOME AND ASSETS

- A. Assets For each \$100.00 of cash assets \$1.00 is treated as chargeable income

i.e. added to

- B. Income
- (i) Dependent children: Disregard first \$12.00 of income
  - (ii) No Dependent children: Disregard first \$8.00 of income

Each \$1.00 of any remaining income reduces the accommodation by \$1.00 - see assessment next page.

Note: If child care costs incurred due to employment. Up to \$20.00 p.w. may be deducted from earnings chargeable as income.

See next page for procedures.

PROCEDURE

- A. Application lodged on Form S.W. 228 - ENSURE - REGISTERED and NUMBER ALLOTTED.
- B. Rent, and outgoings must be verified. Try to sight rent book or receipts at office. Only verify board if amount declared appears excessive.
- C. Only verify assets or income if maximum rate is to be effected.
- D. If earning - Child care costs? If so verify.
- E. Complete S.W. 229 - Example next page.
- F. Complete S.W. 272 - HOI request on S.W. 747 is preferable.
  - B. 60 - \$ weekly amount of accommodation benefit followed by NIL.
  - Check rate - include 2 weekly rate of accommodation benefit.
- G. Issue grant letter to beneficiary (S.W. 237).
- H. Don't forget - graded officer to clear application register.

---

ACCOMMODATION BENEFIT DECLINED

- 1. Ensure notification gives reason for decline, and includes review rights, and if relevant income assessments shown.
- 2. Complete action sheet and clear register.

---

FINALLY (Important)

- 1. If at any time you come across a case where it appears there may be entitlement to accommodation benefit. An application MUST BE INVITED
-

APPLICATION FOR ACCOMMODATION BENEFIT

S.W. 228

Department of Social Welfare

## Application for Accommodation Benefit

Under Section 61E of the Social Security Act 1964  
(to be lodged at nearest office of Department of Social Welfare)

For Office Use Only

Appln No. 2738

Index N/A

S.W. 6 N/A

This application may be completed by either husband or wife for a married couple

Class of benefit or pension ..... WIDOWS ..... Benefit/Pension No. 19/29262

Full name ..... MYRTLE ..... MYRTLE .....  
Please print Surname First Name(s)

Wife/husband ..... N/A .....  
Please print Surname First Name(s)

Address 7281 MARINE PARADE ..... Benefit/Pension No. N/A .....  
NAPIER ..... Phone No. 727666

Have you a dependent child or children? Yes/No

### Income Received During the Last 12 Months

If this application is completed at the same time as an application for a Social Security Benefit, War Pension or for the inclusion of a dependent spouse in National Superannuation, the income panel need not be completed. If you have no income, except a Social Security Benefit, National Superannuation or War Pension, write "Nil" in the total panel. Please produce evidence of your total income received.

	Applicant	Wife/Husband
1. Gross salary (wages) superannuation, income from business	\$1872.00 PA \$36.00 PW	\$
2. Amount received from boarders (including children over 18 years) boarders at \$..... a week boarders at \$..... a week	\$ NIL	\$
3. Allowances from relatives or others (include free board and lodgings)	\$ NIL	\$
4. Gross rent you receive from property or rooms let. If you sublet the property, state weekly rental paid by you \$..... If property owned by you state annual outgoings \$..... (e.g. mortgage interest, rates, insurances, repairs)	\$ NIL	\$ NIL
5. Interest or dividends from bank accounts, P.O.S.B. s/c's, shares, debentures, bonds, mortgages, loans, etc.	\$15	\$
6. Money received from any other source such as maintenance, annuity, Maori rents, lodge, compensation, retiring allowance, etc.	\$ NIL	\$
Total Income	\$1887.00	\$

Names and addresses of employers or other persons from whom above income received.

Item (1) Trev. and Porky's Disco - 207A Tennison Street, Napier

Item (2) P.O.S.B. account interest

Item .....

Item .....

Item .....

Do you or your wife/husband anticipate receiving any income in the next twelve months? If so, give details:

only earnings of \$36.00 PW and bank interest

**REVERSE OF APPLICATION FORM**

**Assets at Date of Application**

This panel must be completed in all cases. If you do not have any assets, write "Nil" in the total. Please produce evidence of assets held.

	Applicant	Wife/Husband
Land and buildings not used by you as a home	\$ NIL	\$
Mortgage or money lent	\$ NIL	\$
Money in P.O.S.B. bank account held by you or on your behalf	\$500.00	\$ NIL
Government Stock, shares, debentures, bonds	\$ NIL	\$ NIL
Any other assets not listed above	\$ NIL	\$
<b>Total Assets</b>	<b>\$500.00</b>	<b>\$  </b>

**Accommodation Costs**

Complete one of the following

(a) RENT. Amount paid weekly. Please bring rent book with you. If sharing accommodation state your share of rental only \$ 72.00

(b) BOARD. Amount paid weekly. If married show total board paid for husband and wife. (Show name and address of person to whom board paid) \$ NIL

(c) OUTGOINGS ON PROPERTY OWNED. For 1, 2, and 3, show most recent payment during the last 12 months and the period the payment covered. For 4 show total paid during the last 12 months. Please produce receipts for all payments

	Amount	Period Covered
1. Mortgage instalments (interest and principal)	\$ NIL	
2. Rates (show rebated amount if applicable)	\$ NIL	
3. House insurance (excluding insurance on contents)	\$ NIL	
4. Repairs and maintenance	\$ NIL	

**Child Care Costs**

If you are a solo parent on Widows Benefit or Domestic Purposes Benefit and in employment, are you paying for child care while in such employment. Yes/No

If "yes" state (a) Weekly amount paid \$ 25.00.....

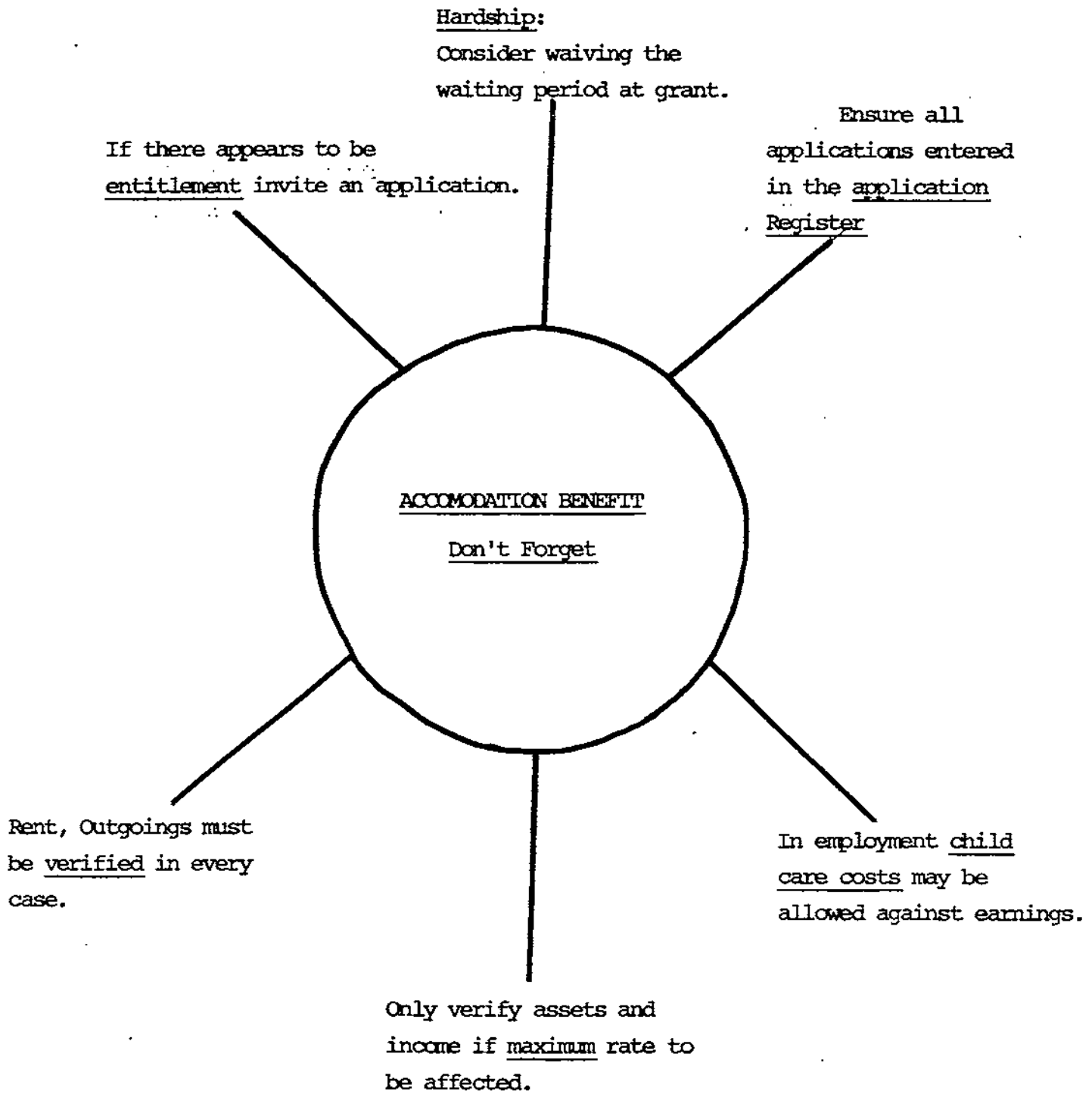
(b) Full name and address of person or organisation providing this service  
**MOLLY'S CRECHE, 3 CREMORNE DRIVE, NAPIER.....**

**Declaration**

I say that the statements and answers in this Application Form, and in any form completed along with it for the same benefit are to the best of my knowledge, the truth, and that I have not omitted anything which would affect my eligibility for an Accommodation Benefit or the rate of that benefit I am to be paid.

5 / 11 / 81 Signature M. WATKIN





# SPECIAL BENEFIT

Reference:

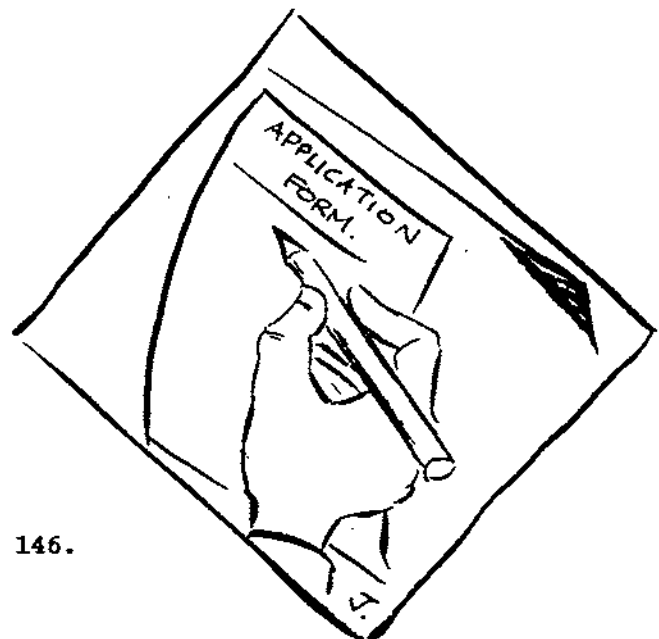
Social Security Act Section 61G.  
Part J Supp Services Manual

If beneficiary is receiving full entitlement to widows and accommodation benefits etc and makes representations for extra money as her income is not sufficient for essential living expenses. Invite application (form S.W. 236) for Special Benefit.

However it is expected that in normal circumstances beneficiaries and non beneficiaries should be able to meet their ordinary household expenditure, from their benefit or other income. Therefore unless there are special circumstances or other costs which could not reasonably be expected to be met from existing income, the case would not normally be one where there would be special benefit entitlement.

It will be necessary to get beneficiaries to detail exactly what they see "their" special circumstances as the present print of form SW 236 may not make this apparent.

Full details of the applicant's fixed costs such as hire purchase commitments, debts etc must be obtained.





**RENEWALS**

# RENEWAL OF BENEFIT

## References:

Section 80(4) Social Security Act.  
Part E Miscellaneous Provisions Manual  
D.P. Manual 4.293 - 4.306.

## WHY RENEW THE BENEFIT?

Section 80(4) of the Act requires that renewals be carried out after the benefit has been paid for 12 months.

## WHAT DOES THE RENEWAL ACHIEVE:

It checks on beneficiary's continued eligibility by her declaring details of income and confirming if necessary that dependent children are still in her care.

## TYPES OF RENEWAL:

Two main ones ...

1. Full rate
2. Where income assessment required - referred to as reduced amount.

## GETTING THE RENEWAL UNDERWAY:

Renewal forms (S.W. 7) are printed at the Data Processing Centre and together with a list of the renewals are sent to District Office for action.

The date of grant of the benefit determines what one of the 13 renewal periods the benefit will expire in. This has already been explained on page 59.

For district office procedure see over.

DISTRICT OFFICE PROCEDURES:

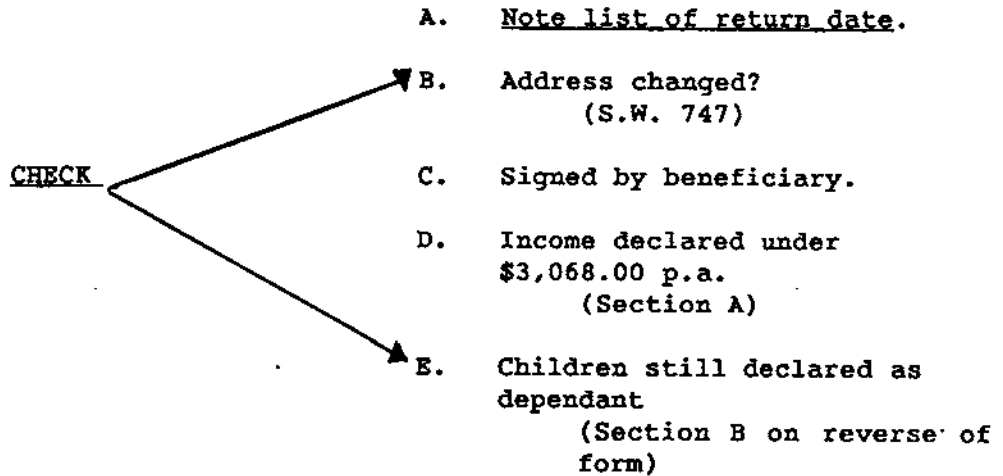
Full Rate Renewals

1. Issue form S.W. 7 to beneficiary.
  - (a) If renewal list shows "Accommodation benefit payable" attach form S.W. 230.  
(This benefit must also be renewed)
  - (b) If renewal list shows "Disability Allowance" attach form SW 247.

NOTE:

- (c) The list may require local preparation of some renewal forms.
2. Note renewal list of dates forms issued.

3. When renewal form (S.W. 7) returned:



4. If above in order ...

Complete bottom portion of S.W. 7.  
See example next page graded officer can sign without involvement of a basic grade clerk.

5. Clear renewal list - note it that action is complete (date and initial)
6. Notification to widow not required.

Example of forms next page.

**Example S.W. 7 Renewal form**

**APPLICATION FOR WIDOW'S BENEFIT**  
ISSUED BY THE DEPARTMENT OF SOCIAL WELFARE

Mrs Polly Wilson,  
200 Colonial Square,  
BIRMINGHAM.

CODE 7  
WIDOW'S BENEFIT  
3/11005

---

**NOTICE REGARDING BENEFIT**

**IMPORTANT:** Failure to complete and return this form promptly will tend to delay or prevent payment.  
This form should be distributed by you, if possible, otherwise by someone who knows your circumstances.  
When received it is subject to review and payment will be made as it is processed.

**PLEASE COMPLETE** Section A and Section C if to be completed if benefit was received or due to you during the year.

ALL QUESTIONS IN SECTION A MUST BE ANSWERED.

---

**SECTION A**  
The Director of Social Welfare, Birmingham.

(A) I, **WILL BEING A WIDOW, HEREBY APPLY FOR RENEWAL OF MY WIDOW'S BENEFIT.**

(B) I DECLARE THAT MY TOTAL INCOME OTHER THAN PAYMENTS FROM THE DEPARTMENT OF SOCIAL WELFARE FOR THE FIFTY TWO WEEKS ENDING 31-12-61 AMOUNTED TO £. 5.00 AS SHOWN IN SECTION E OF THE BACK.

If no benefit was received or due to you during the fifty-two weeks ending 31st Dec 61 and you are not completing the statement of income in Section C, on the back of this form.

I am at present employed at the residence care of WILL  
Name and address of the employer WILL  
The payment address is WILL

Signature Polly Wilson Date 21.12.61

**SECTION C, BENEFIT**

FOR OFFICE USE ONLY

Name of S.S.W. 123 Date 21.12.61

Appropriating officer P. J. Clarke Date 22.12.61

Number and name 123 Date 22.12.61

Reverse of S.W. 7

**SECTION B**  
I am maintaining the following children:

Full Name of Child	Age	Full Name of Child	Age
<u>TRACY ANN</u>	<u>10/12/61</u>		

If any of the above children have attained age 16 years and are not at school, please name and remark:

Details of income, including maintenance (if appropriate), received by or in respect of the above child or children are Nil

---

**SECTION E STATEMENT OF INCOME**

My income for the year ended as shown in Section A was as follows:

Source	Amount
1. Salary, wages or other personal earnings	<u>Nil</u>
2. Dividends from shares or interest from debentures, bonds, or stock	<u>Nil</u>
3. Interest on money lent, in POSS, National Savings, or any other bank, or elsewhere	<u>£ 5.00</u>
4. Gross rent received from property, including rented let... When rent is received, please state: (a) Total weekly rent paid by you (produce rent book) ... or (b) Annual outgoings by way of mortgage interest, insurance, and repairs paid by you (produce receipts) ...	<u>Nil</u>
5. Compensation or damages received	<u>Nil</u>
6. Superannuation or pension other than payments from Department of Social Welfare	<u>Nil</u>
7. Amount received from boarders including children over 16 years ... (_____ boarders at £ _____ per week.) Members of family YES/NO (_____ boarders at £ _____ per week.) Members of family YES/NO	<u>Nil</u>
8. Gross income from business, share, sale of produce, commission, etc. (If expenses were incurred in the production of the income present a profit and loss account or statement of expenses)	<u>Nil</u>
9. Allowances from relatives or others, including the value of board and lodging received from or for services rendered	<u>Nil</u>
10. Money received from any other source such as maintenance, annuity, legacy, life insurance, loans, welfare organizations, etc.	<u>Nil</u>
<b>TOTAL</b>	<u>£ 5.00</u>

Name and address of employers or other persons from whom money was received:  
Name S. J. WYBURN, POSS ACCOUNT, BIRMINGHAM P.D.  
Name No. \_\_\_\_\_  
Name No. \_\_\_\_\_  
Name No. \_\_\_\_\_


# REDUCED AMOUNT PROCEDURE

Where income exceeds the exemption of \$3,120.00 p.a. and benefit cannot be paid at the full rate.

1. Issue S.W. 7 to beneficiary and note renewal list of date sent.
2. Note renewal list of date S.W. 7 returned.
3. If declared income \$3,068.00 p.a. or more place S.W. 7 on file.
4. All the declared income must be verified ...

Do this by issuing

- A. Inquiry forms (See page 43.)
- B. If possible sight bank books etc in the office - don't forget form S.W. 265 for extracts.

Return such items by registered mail. 

5. NOTE The date income is required to be verified for is the income year - Remember this was explained on page 116. Therefore using code 11 as the example the forms should request income for the 12 months ending 02.12.86. But the code 11 renewal period is 01.01.86 - 30.12.86. Do you understand this?

6. On the file, record date inquiry forms issued.
7. Put file in bring up for the two weeks - but watch renewal expiry e.g. code 11 renewal must be completed by 14.01.87.
8. When all inquiry forms returned or all declared income checked:
  - A. If verified income \$3120.00 p.a. or under complete renewal as a full rate one.
  - B. Check, does the verified income agree with that declared?
9. If verified income exceeds \$3,120.00 p.a. - renewal must be completed by carrying out income assessment on W.B. 5 - See example next page.

NOTE If benefits a reduced amount one, no change in income, and will be renewed at same rate - no need to complete W.B. 5.

10. If the total chargeable income figure changes prepare S.W. 747 - show C63 and the new figure. Amend check rate also - see example next page.
11. The income assessment:
  - Charge the actual income received in the income year - watch earnings see page 128.
  - Remember the income principles explained pages 116-119.
  - Assessing net rent - If commitments previously confirmed have not changed - no need to verify at renewal.
12. Note renewal list action complete.
13. Send letter to beneficiary - see example page 152.

---

NOTE: This has been dealt with using a woman with dependent children for assessment and exemption purposes.

continued next page.



Renewals continued..

Reduced Amount Renewals

Example of letter to be sent following reduced amount renewal:-

28.08.87

Mrs Judy Q. Smith  
200 Wai-iti Road  
Timaru

Widow 156,021.452.

Your Widows Benefit has been renewed at \$8684.00p.a. from 31.12.86. to 01.12.87.

The following is the assessment of your benefit:

P.O.S.B interest	\$1760.00	Gross Chargeable Income	\$4576.00
Sydenham Club	\$ 400.00	Less Income Exemption	\$ 3120.00
Watties Dividend	\$ 50.00	Excess	\$1456.00
Broadlands Debentures	\$ 216.00	Income Deduction	\$ 603.20
Mortgage Interest (less 5% Comm)	\$1700.00	Maximum Benefit Rate	\$9287.20
Estate Income	\$ 450.00	Less Income Deduction	\$ 603.20
Total Chargeable		Benefit Payable	\$8684.00
Income P.A.	<u>\$4576.00</u>		

Payment at the new rate will be paid each two weeks at \$334.00 beginning on the due date 06.01.87.

If you are dissatisfied with the decision above, you are entitled to have the decision reviewed by the Social Security Commission.

If you wish to have the decision reviewed you should apply in writing within three months, setting out briefly the grounds on which you object to the decision. A form for this purpose is available from any office of this Department.

Yours Faithfully

D. Fragle  
for Director.

CHILD ATTAINING 15 YEARS

Where a child will attain  
15 years of age during the  
renewal period ---

A two rate decision  
should be shown on  
the W.B. 5

(Applies to both full  
rate and reduced amount  
renewals)

Reason	NIL
Benefit payable	NIL
Renewal	\$9287.20 p.a.
Granted/declined	n/a
	NIL
	\$9287.20 p.a.
Renewal	@ \$9287.20 p.a. from
Granted/declined	06-01-87
	② Family Support at \$2808.00 p.a.
	③ Reduce Family Support to \$1872 p.a.
	(\$36.00 p.w) from 14-06-87 as
	Revin attains 15 years

Beneficiary to be told in writing

Include this passage in the letter ...

"Your benefit has been renewed at ..... p.a. from .....  
to ..... As ..... attains 15 years on ..... your  
benefit will be reduced to ..... p.a. from..... If  
however ..... returns to school and the certificate of  
attendance which will later be sent to you is completed and  
returned, your benefit will be increased back to ..... per  
annum."

NOTE:

Of course closer to the time of  
age 15 - normal child of age  
action will apply (See page 158).



# LATE RENEWALS

AVOID THEM - They disrupt beneficiary and involve you in extra work by possibly having to issue local payments etc.

(Remember Benefits continue automatically into the next renewal period unless input form issued).

On no account is a benefit to be renewed late and payment to beneficiary interrupted because of clerical inefficiency.

- Ensure inquiry forms returned without delay - adequate bring up system etc.
- Don't put off assessing reduced amount renewals.

However late renewals may be necessary where beneficiary delays return of the S.W. 7 - Check regularly outstanding entries on the renewal list.

## Procedure:

1. S.W. 7 not returned after four weeks - issue duplicate with reminder letter.
2. If renewal not returned 7 days before final keying date or returned unclaimed:



- (i) Prepare late renewal list (M.93)
- (ii) Issue S.W. 747 with coding B.94.
- (iii) This coding stops payment from the end of the old renewal.
- (iv) Note late renewal list.

3. Discuss future renewal resumption or cancellation with senior officer (M.110 Four Weekly Manual refers.)

**NOTE:** The B.94 coding may be used on the very exceptional occasion where renewal inquiries will not be completed prior to the deadline for the new renewal period. If payment is unable to be resumed before the renewal deadline or there is a delay in the issue of local payments - BENEFICIARY MUST BE INFORMED IN WRITING

Continued

A final point with renewals

AT RENEWAL WATCH OUT FOR:

1. Need for accommodation benefit - look at response to this question on S.W. 7.
2. If already receiving accommodation benefit has it been renewed.
3. Any income not previously declared.
4. Beneficiary still residing in your area? - Transfer out if moved permanently but complete renewal and all other actions first.
5. Benefits suspended during income year on account of earnings (see page 117). These earnings not to be charged. Also consider review in accord with E1.55 Miscellaneous Provisions Manual.
6. SHARES: (Reduced amount cases)
  - If number and value already confirmed, and no change in declaration.
  - Don't issue form to verify - but confirm dividend from the stock exchange list.
7. Arbitrary assessments (F.11 I&P Manual) Amount to be written down at each renewal.
8. Renewal form fully completed and signed. The income question on the front must be answered. If NIL entered income section on reverse does not have to be completed. Use reasonable discretion if reverse of form not fully completed.

## SELF-TEST QUESTIONS

Do not write on this page

If you are not sure of the answer to any question read the Section again. You will find the answer there.

1. What effect does a child's earnings, say from an after school job, have on the widow's benefit?
2. When beneficiary commences work, and earnings will exceed the income exemption what is the usual way to charge the earnings against benefit payments?
3. What earnings are disregarded?
4. What special provision applies where accommodation benefit payable and child care costs incurred?
5. If beneficiary is receiving full widow's and accommodation benefit entitlements but claims that income is not sufficient for essential living expenses, what application should be invited?
6. What four aspects should you look out for when renewing a widow's benefit?

ANSWERS

1. Child's income is disregarded.
2. At the outset it is usual to charge the earnings on a prospective (rate) basis.
3. A. Earnings received prior to benefit grant.  
B. Earnings received while benefit suspended.
4. Up to \$20.00 p.w. of child care costs incurred due to employment may be deducted from earnings chargeable as income.
5. Application for special benefit on S.W. 236.
6. A. Need for other assistance such as accommodation benefit.  
B. Any income not previously declared.  
C. Beneficiary still residing in your area.  
D. Renewal form properly completed and signed.

**MISCELLANEOUS ACTIONS**

# CHILD OF AGE ACTION

## References

Part A 1 - Miscellaneous Provisions Manual  
Widows Benefit Manual Part E12-E16  
DP Manual - 4.185-4.241

## WHAT IS IT?

It is the clerical action to reinstate Family Support in respect of children turning 15 years or children over 15 years of age.

## WHY HAVE IT?

There is no entitlement to Family Support or family benefit in respect of children when age 15 is reached unless that child continues with education at an approved educational institute such as a school or Univeristy.

## Remember

Family Support is dependent on entitlement to family benefit

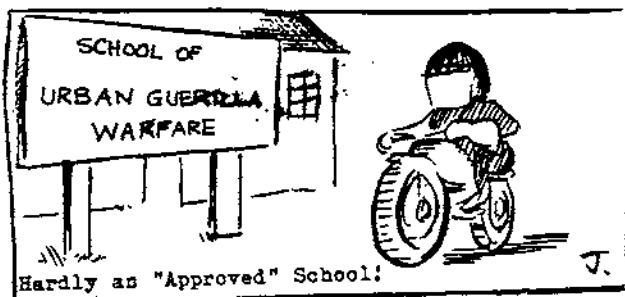
## Approved Educational Institutes

These include Secondary Schools, Universities, Polytechnics etc.

If in doubt see appendix I Part N. Family Benefits Manual.

The child of age action divides in to two categories:

1. The intitial one .. Child turning 15 years (conversion to 0/15 portion)
2. End of school year: Where over 15 child has previously been accepted as dependent.



See next page for procedures.



CHILD DOES NOT CONTINUE AT SCHOOL

- If non standard rate amend locally with S.W. 747.
  - Otherwise no D.P.C. action required - child automatically excluded.
  - Note expiry list.
- 

0/15 CHILD LEAVES SCHOOL DURING YEAR

- Normal review action applies - S.W. 747 etc.  
See Para 4.240 D.P. Manual
- 

POINTS TO NOTE:

1. Apportionments
    - May need adjusting if child not continuing at school.
  2. Spelling on S.W. 747

Important incorrect spelling of child's name will result in input forms rejection.
  3. Public Relations

The Certificate of Attendance at school forms are issued via the family benefit system. Don't bother beneficiary with another form just for widow benefit purposes.

Good liaison between Family and Widow Divisions is the answer.
  4. Child over 15 - not at school but incapacitated from earning a living
    - Providing family benefit payable in respect of child payment of family support may continue.- Don't overlook possible entitlement to Invalids Benefit. (Could qualify from age 15.)
  5. Employment

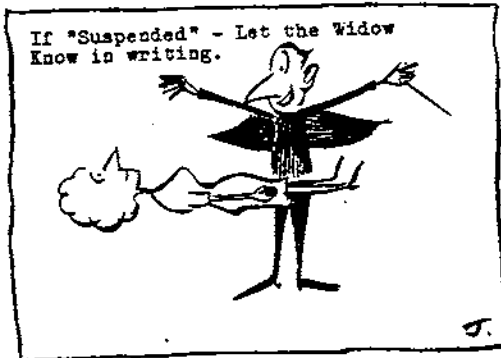
Children over 15 years at an approved school but in employment for 20 hours per week or more. No qualification for Family Support ... F.B. Section obtains the necessary declaration.
- NOTE: Teachers training colleges students are regarded as being in full time employment - no entitlement to family benefit or family Support.



# STOPPING AND STARTING PAYMENT (Suspension)

Reference: Four Weekly Manual N.11 - 12  
D.P. Manual 4.13 - 29

## (Resumption)



Widows benefits may be suspended [withholding payment for temporary period] for a variety of reasons ... The example below is based on an instance where beneficiary has elected to have benefit stopped as earnings from employment are at a disqualifying rate.

The principles below apply to all suspension cases ...

### SUSPENSION PROCEDURES:

1. At interview - full details required of - date work commenced
  - occupation
  - Employers name and address.
  - intended duration of employment
2. Its more preferable to have something in writing from beneficiary, but get above details on file quickly and action S.W. 747 without delay (see step 5).
3. Issue S.W. 8 to verify employment date
  - before issue --- delete questions on form not required.
4. Prepare S.W. 26 - See example next page. Use S.W. 23 if preferred.
5. Prepare S.W. 747 - E.99 coding - (leave check rate blank) - Example next page
6. Will the S.W. 747 stop payment from the desired suspension date?  
If not :  
If bank credit involved - no option but to set up overpayment and request cash refund.  
  
Arrange withdrawal of Direct Credit in accordance with Paras. 6.28 - 6.48 of DP Manual. Suspend from first available date.
7. Issue letter to beneficiary. This must be done in all cases at time of suspension.
8. Follow up:
  - A. S.W. 8 - Check details with beneficiary's statement.
  - B. Withdrawl of Direct Credit.
9. NOTE: Bring up for cancellations not necessary. Procedures for cancellation are contained in the Four Weekly Manual - M108-112.

See forms examples next page.



RESUMPTION PROCEDURE:

Based on situation of beneficiary stating earnings have ceased and that benefit payments now required.

1. Record request on file (preferably in writing and signed by beneficiary).
2. Obtain details of employment.
3. Issue S.W. 8 to check date of cessation of earnings and holiday pay.
4. In urgent cases - action may proceed without return of S.W. 8  
- If possible obtain details by phone.
5. CHECK Qualifications for benefit unchanged - circumstances altered?
6. Prepare S.W. 26 (example next page)  
- Resume payment from day after cessation of earnings or HOLIDAY PAY.
7. NOTE: IF VARIATION IN RATE OF BENEFIT USE S.W. 23 IN LIEU OF S.W.26. REVISED ASSESSMENT TO BE SHOWN - SEE NEXT PAGE.
8. (a) Prepare S.W. 747 input form (see next page) Code F.99:  
  
(b) Note - Some master record details may have been deleted by the E99 action. See 4.15 D.P. Manual.  
  
(c) Have S.W. 747 authenticated (By person at level authorised to grant W.B.).  
  
(d) If arrears due pay by SW55-DDC.
9. LETTER to beneficiary.
10. If necessary follow up return of S.W. 8.

Forms examples next page



SW 55

### DIRECT CREDIT - PAYMENT REQUEST

Class Code      Social Welfare Number      Appt

030      002924893            CHRIS MURPHY  
District

Forenames/Surname

M A R Y - H O U      H I R O K I

Bank Account Details      Amount      Agent Code

Bank      Branch      Account Number      Suffix      Amount      Agent Code

030426005330400      039347     

J. Stewart      30-04-87      J. Chan      30-04-87  
Prepared By      Date      Checked By      Date

.....  
PAY SECTION      Date

11941B-70,000part 2/B4MK

## SUMMARY

### SUSPENSION

1. S.W. 26 or S.W. 23.
2. S.W. 747 - E99 - NIL check rate.
3. Recall of Direct Credit or overpaid bank credit?
4. Letter to beneficiary.

### Resumption

1. S.W. 26. If variation in rates = S.W. 23. (mandatory).
2. S.W. 747 - F.99
  - Authenticate.
  - Details for reinclusion.
3. If arrears due - prepare SW55-DDC.
4. Letter to beneficiary.

SUSPENDING BENEFIT



When request not from beneficiary, payment is only to be suspended in exceptional circumstances, and not without the sanction of a Senior Officer.

In such instances beneficiary must be informed, in writing, as soon as benefit is suspended and told of FULL reasons why such action has been necessary.

The letter must include review provisions.

**CANCELLATIONS**



# CANCELLATION

References:  
D71, Q32 4 Weekly Manual  
4.31-39 D.P.

Cancellation is the file action which is used to stop payment when beneficiary's eligibility for benefit ceases.

The procedure below is based on quite a common reason for cancellation - RE MARRIAGE:

## PROCEDURE:

- (i) Record details of marriage on file - if new name known - cross reference index without delay.
- (ii) Payment stops from (a) day of marriage  
or  
(b) If current instalment uplifted prior to marriage from 1st day of next two weekly pay period.
- (iii) To avoid overpayment - Action SW 273 Urgently see stage (vi).

(photocopy of certificate)

- Don't Delay this because of this
- (iv) Ask for VERIFICATION of marriage - sighting of marriage certificate may have to be followed up after. If marriage certificate not produced after reasonable time - issue SW 2B as last resort.
  - (v) Record action on SW 23 - see example page 169. - final arrears due should be issued by DDC (SW 55).
  - (vi) Prepare SW 273 - Does the deadline meet the desired cancellation date?
  - (vii) Phone concession.
  - (viii) Accommodation benefit is cancelled by SW 273.
  - (ix) Letter: Should include why cancelled, date cancelled from, details final payment, and review rights. Show new name if sent after marriage.
  - (x) Note cover sheet - cancelled. Show both names.
  - (xi) File tag - local procedures apply.
  - (xii) Change the surname on the master record by SW 747. This will change the common index reference.
  - (xiii) Follow up any: - Overpayment  
- Verification of marriage, if necessary.

File is then according to year of cancellation filed in the cancelled series. This series sometimes referred to as closed or dead.

See next page.

POINTS TO NOTE

(All types of cancellations)

Overpaid:

- A. SW 273 may not be able to stop payment from desired date -  
Therefore:

If debt set up  
ensure debt  
records cross  
referenced with  
new name where  
remarried.

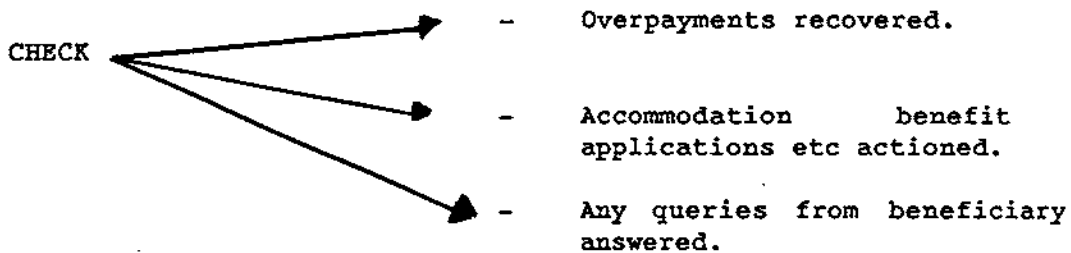
Arrange withdrawl of direct credit in accordance with  
Paras 6.28 - 6.48 of DP Manual or if due date of  
instalment has already passed establish overpayment and  
request cash refund.

Excess Income:

- B. If benefit cancelled on account of excess income, income  
assessment MUST be shown in cancellation letter.



- C. Before filing cancelled file:



- D. NOTE WHEN CANCELLING A WIDOWS  
BENEFIT ARE YOU AWARE OF  
THE STATUTORY PROVISION THAT  
IS NO LONGER FULFILLED. IF  
NOT RECONSIDER REASON FOR  
CANCELLATION AND REVISE YOUR  
KNOWLEDGE OF THE  
QUALIFICATION FOR BENEFIT.

Forms Examples - see  
next page

**FORMS EXAMPLES**

1. Action Sheet S.W. 23

S.W. 23

## CERTIFICATE OF REVIEW

WIDOWS Benefit

Class Code **030**

22 / 84.25

Beneficiary's name: JOAN D. ARK **REMARIED** NGATIKI  
(Last Name) **NON** (Full First Name)

Address: 105 HIGH STREET, UPPER HUTT

Review required on account of Schedule Payment Code and Act No Ref. No.  
MARRIED PADDY NGATIKI ON 15.8.87

---

Overpayments, debts, or overlapping benefits to be adjusted

---

Decision  
**CANCEL WIDOWS BENEFIT FROM 19.8.81**

*A. L. Jones*  
12 / 8 / 87  
Reviewing Officer

*R. Jones*  
12 / 8 / 87  
Authorising Officer

Supervisor's name and address following

INTERIM PAYMENT ORDERS							
Appt Code	Payment Code	Due Date	Amount	Appt Code	Payment Code	Due Date	Amount
		1	\$			1	\$
		1	\$			1	\$
		1	\$			1	\$

Payer's Name

Address

Postal No

For Completion

Checked

S.W. 23.23

Form 74

Debit out

S.W. 23

Index

Final out

FILE 1 U

*M. Jones*

Payment Order Bank Credit

Payment Order Bank Credit

S.W. 23.23 (FORM 23) 12.8.87

2. Input Form S.W. 273

SW273

### NOTICE TO CLOSE SOCIAL SECURITY, WAR PENSION, WAR VETERANS ALLOWANCE, OR OVERSEAS PENSION MASTER RECORD

WELLINGTON District   
  3   
 Social Welfare Number: 293187064   
 App Code: JA   
 Check Initials:

Joan. O. First Name   
 Ark Surname

---

The above record is to be closed on account of:  
(Indicate with ✓ which is applicable)

	01	Death		(Date of Death)
	02	Grant and Death		(Date of Death)
	03	Cancellation		
	04	Grant and Cancellation		
	05	Application Declined		
	06	Application Transferred		
✓	07	(Enter Cancellation Code)	09	

---

To be completed for War Pensions and War Veterans Allowance:

War Pension Code:       
 Entitlement Code:

Prepared By: A. J. J. J.   
 Checked By: J. Jones   
 Date: 12/8/87

Action complete: \_\_\_\_\_   
 Date: 1/19

**HOSPITALISATION**

# HOSPITALISATION

## References:

Social Security Act - S.75  
Part T - Miscellaneous  
Provisions Manual  
Part A - Miscellaneous  
Provisions Manual (Child  
Supplement)

## Introduction

1. For all classes of widows benefit payment continues at the full rate for the first 13 weeks of hospitalisation.

After 13 weeks action varies according to status i.e. with or without dependent children.

2. (a) There is no action if admission is to a private hospital, but watch if beneficiary relinquishes responsibility for care of child (family support).
- (b) There is no distinction between admissions to a psychiatric hospital and admission to other Hospital Board hospitals.

In any communication with beneficiary DO NOT use the term Psychiatric - just refer to Hospital.

NOTE: The hospital procedures mentioned in "Part T Misc. Provisions Manual apply to all Social Security Benefits."

See next 2 pages for procedures.

1074F/98P

WITHOUT DEPENDENT CHILDREN

PROCEDURE

- STAGE 1
1. Record details of hospital admission on file.
  2. If early notification received bring up for 8 weeks.
  3. If discharged prior ensure bring up cancelled.
  4. Still in hospital at 8 weeks - issue SW 46 and SW 47.
  5. File back in bring up for reduction from 13 weeks  
- ENSURE BRING UP EARLY  
ENOUGH TO MEET 13 WEEK  
DEADLINE.
- 

STAGE 2

Discuss any cases of hardship with a senior officer. Higher rates can be approved if necessary.

6. Reduce from expiry of 13 weeks to \$884.00 p.a.  
(See page 149) (\$17.00 p.w.)
    - A. Action on form SW 23  
e.g. Admitted to hospital 3.10.82. Reduce from 3.1.83 i.e. the commencement of the 14th calendar week of hospitalisation.
    - B. Prepare SW 747 -- B61 - Standard hospital rate  
H01 - Date & amount of broken payment  
B29 or 30 - if required.  
C06 - if necessary.
  8. Notification - see suggested one. Page 175.
  9. This rate continues until discharge or if still in hospital until renewal of benefit is due. The Hospital authorities should be asked to comment at each renewal on the capacity of the inmate to appreciate payment of benefit. The continued rate of benefit is then decided having regard also to the beneficiary's assets and expenditure while in hospital. For full details see T2.65 - T2.70 Misc. Provisions Manual.
- 

SUMMARY

- (No dependents)
- A. Full benefit 13 weeks.
  - B. After 13 weeks reduce to \$17.00 pw.
  - C. Continue until renewal when future rate depends on circumstances.

WIDOW WITH DEPENDENT CHILDREN

PROCEDURE:

1. Record details of hospital admission on the file.
2. Benefit continues at full rate for 13 weeks.
3. Sometimes representations for apportionment of benefit will be received before the expiry of 13 weeks and are to be actioned. Warn the beneficiary that their position will need to be reviewed on completion of 13 weeks in hospital.
4. If no representations received check on welfare of children.
5. If hospitalisation continues -  

Before expiry of further 13 weeks -  
submit to senior officer with recommendation as to

  - Rate of future benefit
  - or
  - Apportionment.
6. Continue until renewal or in accordance with decision.

See next Page for  
miscellaneous provisions.



POINTS TO NOTE

1. PSYCHIATRIC HOSPITAL

Treat as same as Public Hospital.

---

2. OVERPAYMENTS

Do not establish overpayment if there is delay in actioning hospital reductions.

Refer circumstances to Senior Officer.

---

3. ACCOMMODATION BENEFIT

- May continue for first 13 weeks of hospitalisation.

- Watch --- Review if accommodation expenses alter.

---

4. CHILD ADMITTED TO HOSPITAL

Ref: Family Support Tax Credit  
Policy Manual 27.1 - 27.2

Family Support may continue providing beneficiary still receives family benefit

---

5. DISABILITY ALLOWANCE

If the person in hospital is in receipt of disability allowance this should be withdrawn concurrently with the reduction to hospital rate.

---

6. FINALLY

A. Discharge

- Increase benefit to full rate from date of discharge.

B. Readmission

(i) Where benefit is payable at the hospital rate and the beneficiary is absent from hospital for 28 days or less then on his return to hospital the benefit shall revert to the rate previously payable.

(ii) If discharge longer than 28 days original provisions apply i.e. reduce after 13 weeks.

See next page for notification.

See next page for letters.

HOSPITAL NOTIFICATIONS

1. LETTER TO BE SENT AFTER 8 WEEKS  
of hospitalisation (single person)  
no dependants

Dear ,

Reference

I am sorry to learn of your admission to hospital on .....

This letter is to let you know that section 75 of the Social Security Act requires that payment of a social security benefit, including national superannuation, payable to persons other than married persons with dependent children, be reduced to \$17 per week after 13 weeks in hospital.

However, the Social Security Commission may pay a higher rate than \$10 a week where there are continuing expenses, for example - rent, mortgage interest, rates, or insurance premiums which cannot reasonably be met from the patient's own resources.

If you have continuing commitments while you are in hospital, which you will be unable to meet from reduced benefit and/or from your own resources, would you please complete and return the attached form as soon as possible.

If I do not receive a reply from you, or on your behalf payment of your benefit will be reduced to \$17 a week from .....

On receipt of advice of your discharge from hospital, your benefit or national superannuation, if it has been reduced, will be restored to the appropriate maximum rate then payable.

If you have any financial or other difficulty that you would like to discuss please let me know.

Yours faithfully,

Director

---

2. SUGGESTED LETTER ---

At pay action after 13  
weeks. (may need adapting  
to meet circumstances)

Dear ,

Widows Benefit

Further to my letter of . Your benefit has now been reduced  
to from (following expiry of 13 weeks hospitalisation).  
The credit due at \$ represents part of the reduced  
rate. Future two weekly instalments will be at \$34.00. Remember I informed  
you on that a higher rate of benefit may be approved in certain  
circumstances where you have continuing expenses.  
If you are still in hospital at a person from this office will call  
on you to discuss your position.

for Director

Include review rights

**DEPARTURE FROM NEW-ZEALAND**

# DEPARTURE FROM NEW ZEALAND

References: Section 77 SS Act  
Part Q Misceal.  
Provisions Manual  
CM 1985/109

Permanent departure:

Benefit ceases from day after departure.

Temporary absence:

Entitled to payment for up to 26 weeks of a period of temporary absence, providing the beneficiary returns to NZ within 30 weeks of departure.

NOTE

- (i) If absence exceeds 30 weeks payment cannot be approved for any period of the absence. - BUT SEE PAGE 182 RE UNEXPECTED DELAYS.
- (ii) Any beneficiary leaving the country for less than 26 weeks is not required to notify the Department of her absence.

PROCEDURE

Permanent Departure

1. We want to know: - Date of departure from N.Z.  
- Overseas address or if not available N.Z. contact. Preferably complete S.W. 422 interview form.
2. Cancel from day after departure. Action on SW 23.  
BUT
3. If instalment credited prior to departure payment may be confirmed to the end of that two weekly pay period.
4. Prepare SW 273 - Don't delay. Avoid overpayment.
5. Normal cancellation (letter etc) procedures apply.  
See page 167 (Also see stage 8 below).
6. Deletion of bank credit - Don't overlook using this facility if necessary. (Para 6.28 D.P. Manual refers.)
7. If overpayment to be recovered and beneficiary overseas - see para Q.87 Pay Manual - also CM 1983/59 para 1.2 where debt less than \$10.00.
8. Special provisions apply if going to Australia or the United Kingdom. If intending to reside in one of these countries permanently - possible entitlement to reciprocal widows benefit.

Australia

- (i) Issue form recip A.  
see Para B 135(g)(j) Recip Manual.
- (ii) Letter see specimen letter B page 184.
- (iii) If final payment not made in New Zealand, issue to Australia.(appropriate state) on form Recip B.

United Kingdom

- (i) Issue form NZ 2 to Dept of Health & Social Security (D 216 Recip Manual refers).
- (ii) Letter - See Specimen B page 184.

NOTE Arrears of New Zealand benefit cannot be sent to the United Kingdom. However they can be paid to an agent in New Zealand.

Next page - Temporary absence.

PROCEDURES: - TEMPORARY ABSENCE

Period of absence 30 weeks and under

Period of absence exceeds 30 weeks

1. Beneficiary does not have to notify

But if does

2. And calls at office. Have - interview sheet from leaflet S.W. 442 completed and give leaflet to beneficiary.  
Example page 180.

3. Place interview sheet, beneficiary's letter or phone details on file.

4. Payment may continue in N.Z. during period of absence.

5. LETTER must be issued in every case - see Specimen A Page 183  
Also see stage 8 below

6. File may then be filed.

7. No need for any other action like bring up etc.

1. Have interview sheet from leaflet S.W. 442 completed and give leaflet to beneficiary.  
Example page 180.

2. SW 747 action - to stop payment URGENT - Don't delay so to avoid overpayment.

3. Record suspension on SW 23.

4. Suspension date is from day after departure.

But

If instalment credited prior to departure - payment may be confirmed to the end of that two weekly pay period.

5. Letter to beneficiary point out --  
- Date of suspension  
- Quote Section of act (S.77) that prohibits payment.  
- Review rights.  
Watch stage 7 and 8 below.

8. WATCH

(i) Intention not clear as to period of absence - may be safer to suspend payment to avoid overpayment -- discuss with beneficiary.

(ii) Intends to Apply for UK Pension:

(however there is no advantage to do this)

(a) Payment must be suspended for period of absence.

(b) Extra details in letter see para 28 CM 1981/71.

(c) Payment for period of absence authorised on return less o'seas pension.

(iii) See next page.

7. Australia

(i) Beneficiary must be told that after 6 months residence in Australia she is entitled to apply for reciprocal Australian Widows Pension.

(ii)

NOTE: As period of absence exceeds 26 weeks Agency payments cannot be made.

(iii) Issue letter see specimen letter D page 186.

(iv) Issue from Recip. A to Australian Authorities.

If going to the United Kingdom see next page.

TEMPORARY ABSENCE PROCEDURES (continued)

26 weeks and under

over 26 weeks

(iii) In receipt of U.K. widows pension. If beneficiary also receives UK widows pension NZ widows benefit should be suspended and beneficiary told to apply for increase in UK pension if absence is in the UK. Any arrears less amount of O'seas pension will be issued on return. See specimen letter C, Page 185.

(iv) Australia  
Payment may be made on Agency basis in Australia for the first 26 weeks - (Recip B etc completed) principles B150 recip manual apply. However it may be more efficient for beneficiary to have benefit credited to New Zealand bank account, and bank transfer system operated BUT BENEFICIARY MUST BE GIVEN THE OPTION.

8. United Kingdom:

(i) Entitlement to reciprocal widows pension from date of arrival in UK. Beneficiary should be told to apply see specimen letter E page 187. Also Form NZ 2 to be issued. Delete question 4(d) on this form.

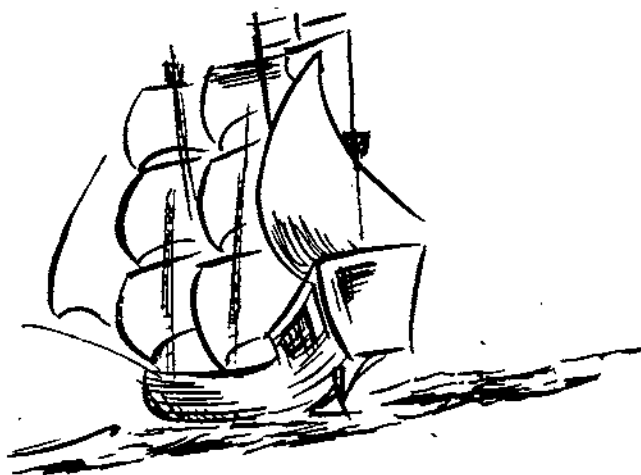
(ii) If receiving UK Widows Pension in New Zealand (probably operating as direct deduction from N.Z. Widows benefit) beneficiary should be told to apply for an increase in this pension while in the United Kingdom specimen letter B page 184 applies.

---

NOTE: For explanation of reciprocal forms and UK and Australian address's see pages 102-103.

What happens on return to New Zealand see next page.

If beneficiary calls at office to notify of departure have this form completed. --- After detaching the form from leaflet S.W. 422 give the leaflet to beneficiary.



OVERSEAS  
FOR OVER  
**30** WEEKS  
NO PAYMENT





WHAT TO DO WHEN BENEFICIARY RETURNS TO NEW ZEALAND

Absent for 30 weeks or less

1. If calls at office have standard return to New Zealand form completed --- see Section 5 Appendix I, Part Q, Miscellaneous Provisions Manual.

2. If beneficiary phones - record details required by above form on the file.

3. If payment stopped and no o'seas pension received while absent-- RESUME payment and issue arrears (payment for period of absence) also watch if Agency payment issued in Australia.

4. If dependent children - have they returned? entitlement to child supplement.

Turned 16 years while away?

5. Don't forget SW 747 if payment to be resumed. Must be authenticated as well as checked. See resumption procedures page 165.

6. Letter to beneficiary.

7. If payment was not stopped --- no action required (record details on file) except if o'seas pension received while away.

8. Overseas Pension increased while absent.

(i) Resume payment from date of arrival.

(ii) UK may send form N.Z.5 showing o/seas pension paid. If not issue NZ9. Deduct o/seas pension from arrears due (Exchange rate operating at time of review).

(iii) Letter clearly setting out assessment.

- Principles Page 101 apply.

9. Agency payments received in Australia

Resume from day following payment made to in Australia. Follow up form C, see Para B185 Recip manual.

Absent for longer than 30 weeks

1. If absence exceeded 2 years a fresh application should be taken.

Under 2 years

1. Have return to New Zealand form completed (see Section 5, Appendix I, Part Q, Miscellaneous Provisions Manual).

2. Resume payment from day of arrival in New Zealand  
- SW 23  
- SW 747 authenticate  
(see resumption procedures page 151)

3. Letter.

4. Watch if beneficiary did not intend to be absent for more than 30 weeks and was held up beyond her control - discuss with senior officer. There may be entitlement to payment for period of absence.

5. If absence was in Australia or the United Kingdom, obtain verification that overseas pension has ceased.  
(i) Recip A for Australia - end to appropriate State capital  
(ii) NZ9 for UK. Do not hold up resumption - do this as a follow up.

ILLUSTRATION NO. 56 (B.93)

"Thank you for letting me know that you intend to leave New Zealand for a temporary period.

Please note that Section 77 of the Social Security Act states that the maximum period for which payments may be made is up to 26 weeks from the day following the date of departure from New Zealand provided the period of absence is 30 weeks or less.

No payment will be made if the absence from New Zealand is for a period in excess of 30 weeks. However if the absence was beyond 30 weeks and was due to circumstances beyond the beneficiary's control which could not reasonably have been foreseen by the beneficiary before departure. The Social Security Commission may regard the absence as having a duration of 30 weeks.

As you only intend to be absent for 4 weeks your benefit will continue to be credited to your bank account.

If you do decide to extend your overseas absence to a period exceeding 30 weeks please let me know without delay so an overpayment of your benefit may be avoided."

Speciman Letter A  
INTENDED DEPARTURE  
30 WEEKS OR LESS

"As you are intending to leave New Zealand for permanent residence in <sup>1</sup> Australia your benefit has been cancelled from \_\_\_\_\_, the day following your projected departure.

Payment for the period \_\_\_\_\_  
to \_\_\_\_\_ amounting to \$ \_\_\_\_\_  
will be credited to your \_\_\_\_\_ account  
on \_\_\_\_\_.

When making application for the <sup>2</sup> Australian Widows Pension <sup>3</sup> please present this letter to the Regional <sup>4</sup> Office of the Department of Social Security nearest to you. To assist in determining this application details of your case have been referred to the <sup>5</sup> Director of Social Security \_\_\_\_\_"

---

For United Kingdom:

1. United Kingdom
2. Pension under the National Insurance Scheme
3. United Kingdom
4. The nearest office of the Department of Health and Social Security
5. Department of Health and Social Security.

Specimen Letter B DEPARTING FOR PERMANENT RESIDENCE IN AUSTRALIA OR UNITED KINGDOM
--

ILLUSTRATION NO. 58 (F94)

"Thank you for letting me know that you intend to leave New Zealand for a temporary period in the United Kingdom.

Please note that Section 77 of the Social Security Act states that the maximum period for which payments may be made is up to 26 weeks from the day following the date of departure from New Zealand provided the period of absence is 30 weeks or less.

Your benefit has been suspended from \_\_\_\_\_ the day following your projected departure.

On arrival in the United Kingdom you should apply at the nearest office of the Department of Health and Social Security for an increase in your United Kingdom Widows Pension.

If you return to New Zealand within 30 weeks payment of your New Zealand benefit will be approved for the period of absence or for 26 weeks whichever is the lesser period.

If you are dissatisfied with the decision above you are entitled to have the decision reviewed by the Social security Commission.

If you wish to have the decision reviewed you should apply in writing within three months, setting out briefly the grounds on which you object to the decision. A form for this purpose is available from any office of this Department (SW 143 Application for Review of Decision)."

Specimen Letter C  
DEPARTURE UNDER 26  
WEEKS TO APPLY FOR  
INCREASE OF UK  
WIDOWS PENSION IN THE  
UNITED KINGDOM

ILLUSTRATION NO. 59 (F94)

"Thank you for letting me know that you intend to leave New Zealand for a temporary period.

Please note that Section 77 of the Social Security Act states that the maximum period for which payments may be made is up to 26 weeks from the day following the date of departure from New Zealand provided the period of absence is 30 weeks or less.

As you are to be absent for 12 months your benefit has been suspended from \_\_\_\_\_, the day following your projected departure.

Payment for the period \_\_\_\_\_ to \_\_\_\_\_ of \$\_\_\_\_\_ will be credited to your \_\_\_\_\_ account on \_\_\_\_\_.

As you are to spend your absence in Australia you are, under the provisions of the Reciprocal Agreement, entitled to claim an Australian Widows Pension after 6 months residence in Australia. To assist in determining this application details of your case have been referred to the Director of Social Security \_\_\_\_\_.

If you are dissatisfied with the decision above you are entitled to have the decision reviewed by the Social Security Commission.

If you wish to have the decision reviewed you should apply in writing within three months, setting out briefly the grounds on which you object to the decision. A form for this purpose is available from any office of this Department (SW 143 - Application for Review of Decision)."

Specimen Letter D  
TEMPORARY ABSENCE  
IN AUSTRALIA LONGER  
THAN 26 WEEKS

"Thank you for letting me know that you intend to leave New Zealand for a temporary period.

Please note that Section 77 of the Social Security Act states that the maximum period for which payments may be made is up to 26 weeks from the day following the date of departure from New Zealand provided the period of absence is 30 weeks or less.

As you are to be absent for 6 months your benefit has been suspended from \_\_\_\_\_, the day following your projected departure.

Payment for the period \_\_\_\_\_ to \_\_\_\_\_ of \$\_\_\_\_\_ will be credited to your \_\_\_\_\_ account on \_\_\_\_\_.

As you are to spend your absence in the United Kingdom you are, under the provisions of the Reciprocal Agreement, entitled to claim a National Insurance Pension immediately on your arrival in the United Kingdom. To assist in determining this application details of your case have been referred to the Department of Health and Social Security \_\_\_\_\_.

If you are dissatisfied with the decision above you are entitled to have the decision reviewed by the Social Security Commission.

if you wish to have the decision reviewed you should apply in writing within three months, setting out briefly the grounds on which you object to the decision. A form for this purpose is available from any office of this Department (SW 143 - Application for Review of Decision)."

Specimen Letter E  
TEMPORARY ABSENCE IN  
UK LONGER THAN  
26 WEEKS

ILLUSTRATION NO. 61 (B94)

"Thank you for letting me know that you intend to leave New Zealand for a temporary period.

Please note that Section 77 of the Social Security Act states that the maximum period for which payments may be made is up to 26 weeks from the day following the date of departure from New Zealand provided the period of absence is 30 weeks or less.

As you are to be absent for 6 months your New Zealand Widows Benefit has been suspended from \_\_\_\_\_, the day following your projected departure.

Payment for the period \_\_\_\_\_ to \_\_\_\_\_ of \$ \_\_\_\_\_ will be credited to your \_\_\_\_\_ account on \_\_\_\_\_.

On arrival in the United Kingdom you should apply at the nearest office of the Department of Health and Social Security for an increase in your United Kingdom Widows Benefit.

If you are dissatisfied with the decision above you are entitled to have the decision reviewed by the Social Security Commission.

If you wish to have the decision reviewed you should apply in writing within three months, setting out briefly the grounds on which you object to the decision. A form for this purpose is available from any office of this Department (SW 143 - Application for Review of Decision)."

Specimen Letter F  
TEMPORARY ABSENCE  
OVER 26 WEEKS IN UK  
TO APPLY FOR  
INCREASE IN UK  
PENSION



POINTS TO NOTE

DELAYS

1. If return to New Zealand delayed, resulting in absence exceeding 30 weeks and delay due to circumstances beyond the beneficiary's control which could not reasonably have been foreseen by the beneficiary before departure THE ABSENCE MAY BE REGARDED AS HAVING A DURATION OF 30 WEEKS.

INTENTION

2. Does beneficiary understand that if absence exceeds 30 weeks - There is no entitlement to any payment for period of absence.

Watch -


Cases where extent of intended absence not clear at time of departure.

CARE OF CHILDREN

3. What is position of dependent children following departure ---
  - If no longer cared for - entitlement to family support?
  
  - Qualification for widows benefit affected?

ABSENCE FROM NEW ZEALAND

SUMMARY

<u>TEMPORARY</u>		<u>PERMANENT</u>
<u>30 weeks and under</u>	<u>over 30 weeks</u>	
<p>1. Entitled to payment for period of absence.</p> <p>2. <u>Watch:</u>                      (a) Agency payments if going to Australia.                      (b) Suspend payment if: </p> <p>(i) Intends to apply for UK pension.</p> <p>(ii) If receives U.K. widows pension and goes to UK (entitled to increase).</p> <p>(iii) Period of absence uncertain.</p>	<p>1. No entitlement for period of absence - suspend payment.</p> <p>2. Entitled to reciprocal <u>Australian Widows Pension</u> after 6 months residence there. - Tell bfy and Aust. authorities</p> <p>3. Entitlement to <u>U.K. reciprocal widows pension</u> from date of arrival in UK. Tell beneficiary and U.K. authorities.</p> <p>4. If receiving U.K. widows pension while in N.Z. tell beneficiary to apply for an increase in the U.K.</p>	<p>1. Cancel benefit from day after departure.</p> <hr/> <p>2. <u>Australia</u></p> <p>- Entitled to recip. widows pension on arrival. Recip B for final payment &amp; issue form Recip A</p> <hr/> <p>3. <u>United Kingdom</u></p> <p>Issue NZ 2.</p>

RETURN:

1. Absence over 30 weeks:

Resume from date of arrival in N.Z.

2. If payment was suspended and absence 30 weeks or under - issue arrears - deduct any o'seas widows pension received while absent.
3. Payment suspended for more than two years take fresh application.
4. If intended to be absent for 30 weeks and under but delayed through no fault of own --- discuss with senior officer possible entitlement to payment for period of absence.

# CHANGE OF ADDRESS WITHIN A DISTRICT

Reference: 2.28 D.P. Manual

## WHAT TO DO

1. Record details on file  
- preferably have in writing from beneficiary.
2. If Accommodation benefit payable ....  
will adjustment be required?
3. S.W. 747 to amend master record ....  
issue without delay.

Don't forget

C06 - address  
C13 - Postal code

4. Issue 34E to beneficiary - Copy for file  
(Neatness essential).

NOTE: If address change notified on form SW 12 this form may be used  
in lieu of SW 747.

but note the SW 34E copy  
that the SW 12 actioned.

The 34E copy is then the file record of the address change.

# BENEFICIARY MOVES PERMANENTLY TO ANOTHER DISTRICT

The file must be transferred.

References: 4 Weekly X1 - X11  
 D.P. - 2.26  
 - 4.90


- Transferring offices action termed ... Transfer out

- Receiving offices action termed ... Transfer in

- Both actions are recorded on the form S.W. 10B.
- Change the district code address and postal code on the master record on form SW 747.

The top of this form is for the record of transfer details, and the bottom serves as an input form, and national index notification.

S.W.10  
 Example of completed S.W. 10

 **dsw**

## TRANSFER OF PERSONAL PAPERS

The Director, Area Welfare Officer.  
INVERCARGILL

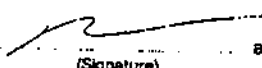
Attention 4 WEEKLY Section.

Social Welfare number 345/628901 District DUNEDIN

Client Name PENNY HENRY

New Address 1 DEE STREET, INVERCARGILL

THE ABOVE NAMED IS RESIDING IN THIS/DISTRICT, PERSONAL PAPERS PLEASE ATTACHED.

Date 6/1/82  at DUNEDIN  
(Signature) (District Name)

---

ADDITIONAL INFORMATION

---

NEW DISTRICT ACTION

Change of Address and District completed	/ / (Date)
Benefit reauthorised/debt noted (if required)	/ / (Date)
All action completed, file	/ / (Date)

192.

Procedures next 2 pages.

# Transfer out

## PROCEDURE

1. Is the change of address permanent? - If not reconsider transfer.

2. Prepare S.W. 747 C.06 - Address  
(new details) C.13 - Postal Code  
or  
C.14 - Bank Acct No.

IMPORTANT

(If this not arranged promptly. Payment may be interrupted).

3. Cancel phone concession.

4. Complete S.W. 10B (See Previous Page)  
- Top portion  
- Note any outstanding actions at bottom.

5. If file part 2 - Attach part 1.

6. Renewal due? - Note renewal list

Prepare file tag  
e.g. ...

7. THINK OF OTHERS: - Complete outstanding actions prior to transfer.

However

In the odd case follow up may be better undertaken in the new district.

8. Debt - If so refer to revenue section.

9. Mail.

○  
1 REVENUE  
2 INDEX  
3 MAIL

# Transfer in

## TRANSFERS IN PROCEDURE:

1. S.W. 10B will be on file from previous district.
2. Complete receiving Director's panel of S.W. 10 already on file - (See example page 192).
3. Note if other district has not issued S.W. 747 for:  
New address - C.06  
Postal code - C.13  
or  
Bank Account - C.14  
New district - C.02, prepare SW 747.
4. S.W. 747 goes to pay section for keying of details for computer amendment.
5. Issue form S.W. 11C to beneficiary.
6. **FINALLY CHECK**
  - A. Was there a debt in the previous district that now requires "transferring in".
  - B. Case may need adding to the renewal list.
  - C. Accommodation benefit entitlement?
  - D. Phone Concession?
  - E. Did the previous district leave any outstanding actions on the file - They shouldn't have !! but you are obliged to complete such actions.
  - F. Did the previous district have some action in bring up - if so prepare new bring up or put expiry date on computer.

IMPORTANT

Bring Up

Transfer out - next page.

TRANSFERS OUT

POINTS TO NOTE



1. ACCOMMODATION BENEFIT

With the change of address, may require adjustment.

IMPORTANT

Don't automatically suspend - Attempt to determine what the new accommodation costs are and adjust accordingly.

---

2. ENSURE FILE ADDRESSED TO CORRECT DISTRICT

Watch

Wellington/Auckland areas

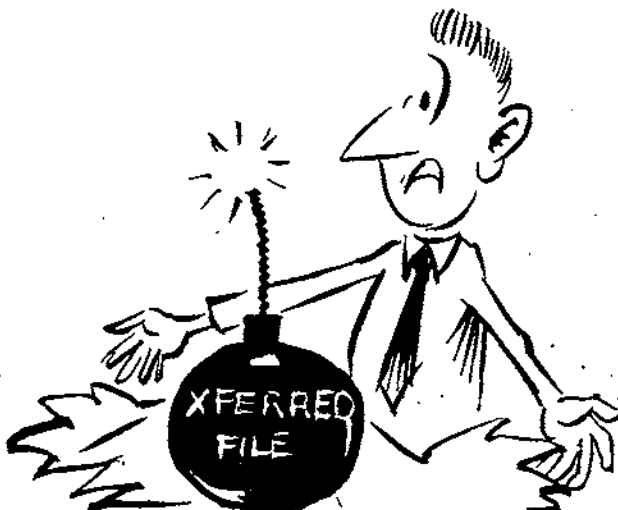
Here there are several offices - Send the file to the correct office.

e.g.

New district may be Lower Hutt or Manakau rather than just Wellington or Auckland.

---

3. DID YOU TIDY UP YOUR OUTSTANDING FILE ACTIONS PRIOR TO TRANSFER?



# AGENTS

Reference: D.P. 6.49  
Four Weekly, Part V

These are people who are authorised to collect payment orders on behalf of beneficiary.

There is no provision to pay benefit to any bank account where the beneficiary is not named in and is not a principal to the account. Therefore, if an application for the appointment of an agent is received, the reason for the request must be ascertained.

## "Agent For" Cases

When a beneficiary is in an institution it is possible to credit the benefit to the account of the institution. Full details are given in Para 6.50 - 6.52 of the DP Manual.

## PROCEDURE

1. Request should be in writing - signed by both beneficiary and agent - preferably use form SW 17.
2. Use common sense if beneficiary not in position to sign.
3. 007.102 may give approval.
4. Prepare SW 747 - A. B27 coding.  
B. Will address, need changing to the agents.
5. Payment orders then produced with Agents name added - either beneficiary or agent may cash.
6. Notification to both agent and beneficiary.

## IMPORTANT

7. BENEFICIARY AS WELL AS THE AGENT MUST BE NOTIFIED OF ANY SUBSEQUENT CHANGE WHATSOEVER IN BENEFIT PAYMENT, ENTITLEMENT ETC.

## NOTE:

1. PAYMENT DIRECT CREDITED  
(Bank Account)  
Beneficiary should arrange with bank for authority for another person to draw out credit - Assist if necessary.
2. CHECK - Para. V.14 4 Weekly Manual - Grounds agent appointment.  
- " V.41 4 Weekly Manual - Restriction on agents.

DEPARTMENTAL STAFF NOT TO ACT AS AGENT WITHOUT HEAD OFFICE APPROVAL.

---

## APPORTIONMENTS

In certain cases payment of benefits can be apportioned to the Housing Corporation or the Department of Maori Affairs. See Part V of 4 Weekly Manual.



## SELF-TEST QUESTIONS

Do not write on this page

If you are not sure of the answer to any question read the Section again. You will find the answer there.

1. How do we confirm if a child over 15 years has returned to school?
2. Beneficiary has a dependent child aged 19 not in employment, receiving a tertiary bursary and attending university full time, is there entitlement to a family support?
3. What must be done immediately after suspension of a widows benefit?
4. If beneficiary is admitted to hospital what important aspect must be considered?
5. Does benefit continue at the full rate following hospitalisation?
6. Beneficiary is absent from New Zealand for 40 weeks. Is there entitlement to widows benefit for the first 26 weeks of absence?
7. If a file has outstanding actions do you complete these before transfer to the new district?

ANSWERS

1. From certificate of attendance issued by the family benefits division.
2. No. Entitlement to family support ceases at the end of the year in which the child turns 18 years. In this case if the child had have been 18 years or under there would have been entitlement.
3. Beneficiary told in writing of the full reason why the action was necessary.
4. The welfare of any dependent children. Also arrangements for benefit payment.
5. Only for the first 13 weeks.
6. No. If absence exceeds 30 weeks payment cannot be approved for any period of absence. (except -- special provisions apply - delays beyond beneficiarys control)
7. Yes.

# ADVANCE PAYMENT OF BENEFIT

## References:

- Social Security Act - S.82(6)
- Part E Supplementary Services Manual

## WHAT IS AN ADVANCE?

The payment in a lump sum of benefit entitlement. Benefit instalment is reduced so the advance may be recovered over a chosen period not exceeding 2 years. The maximum amount which may be paid in any one year is an amount equivalent to the benefit rate for 6 weeks.

## WHY?

So beneficiary may meet essential needs or additional expenses, such as clothing, bedding purchases or urgent travel requirements.

## OTHER CONDITIONS:

- (i) Cash assets cannot exceed:
  - Dependent children \$800.00
  - No dependent children \$400.00
- (ii) Recovery must be within 2 years.

## HOW IT WORKS

- Beneficiary requests the lump sum amount.
- Issue payment by Daily Direct Credit (SW55).
- Recovery effected by reducing benefit payments over elected period.
- At end of period payments automatically restored to full rate.

See next page for procedures.

Processing Advance Application -

PROCEDURE:

1. Have S.W. 20 Application form completed see next page.
2. Ask beneficiary
  - A. Preferred period of recovery. Remember 2 year maximum.
  - B. Does she understand period benefit will be reduced for - able to manage?
3. Enter in register
4. Obtain Divisional Officer's approval - signature on file.

Don't delay - payment is often required urgently.

5. Complete lower portion S.W. 20 see example next page.
6. Complete SW 747 input form  
(Example next page)                      Coding B44 show expiry of advance and weekly recovery rate.

NOTE: Expiry date must be last day of a pay period.

Does the SW 747 issue date meet the deadline for advance recovery commencement?

7. Issue advance payment by Daily Direct Credit (SW 55).
8. Issue letter see example page 92.

NOTE: Advance and overpayment details cannot be recorded separately on the master record - combine details.



Example of Notification

Mrs Suzette Dullmoon,  
972 The Terrace,  
WELLINGTON.

Dear Mrs Dullmoon,

Widows 467442889

Your application for an advance of your Widows Benefit to assist with clothing purchase has been approved.

Payment of \$250 will be credited to your ..... account on .....

This amount will be recovered from your widows benefit at the rate of \$5.00 p.w. from payments due 11.8.81 to 13.7.82.

If you have any further queries I shall be happy to assist you.

.....

for Director

## ADVANCES

### POINTS TO NOTE:

1. If advance is for arrears of continuing expenses such as electricity or telephone - Discuss with beneficiary the advantages of contacting a budgeting service.

- Is there be entitlement to accommodation benefit?

### WATCH:

#### 2. If advance applied for:

- |  |  |
|--|--|
| A. Spectacles, Dentures                | - Refer to local hospital board. (Local rules apply - some boards do not accept liability).  |
| B. Maintenance to home                 | - Consider Repairs Advance application page 219.   |
| C. Problems associated with disability | - Suspensory loans Disability allowance. Page 217.   |
| D. Childrens Expenses                  | - also consider --<br><br>(i) Handicapped childs allowance<br><br>(ii) F.B. advance -<br>- school uniforms.<br>- child care restraint. |
| E. Payment of Rates                    | - Also refer to local council entitlement to Rates Rebate!   |
| F. Medical Expenses                    | - Possible entitlement disability allowance.   |





PROCEDURE

1. Complete S.W. 23 (Example previous page)
  - show assessment of overpayment on reverse of form.
2. If possible discuss with beneficiary --- offset or cash refund. If beneficiary has a sufficient cash assets - request cash refund.
3. If offset:
  - A. Beneficiary to decide on reasonable amount to be deducted each week.
  - B. ON NO ACCOUNT IS A HARSH OR UNREASONABLE AMOUNT TO BE DEDUCTED FROM CURRENT BENEFIT.
  - C. Prepare S.W. 220 - see example next page
  - D. S.W. 747 - Expiry date and weekly amount of recovery. Reduce check rate. See next page.
4. If cash refund
  - S.W. 747 only required if because of circumstances giving rise to overpayment rate etc needs changing.
  - Debt details here not recorded on Master record.
5. Send letter - see example page 207.
6. After checking --- The file is referred to revenue section for debt card preparation etc, and if necessary follow up for refund.

NOTE: In some offices debt cards are completed prior to referring file to revenue section.
7. If offset - no need for bring up - DPC increase benefit automatically --- but there is expiry list action to notify beneficiary.

Forms example next page.



EXAMPLE OF LETTER  
EXPLAINING BENEFIT  
OVERPAID AND RECOVERY  
ACTION

Mrs Trudy Bartholomew,  
105 High Street,  
LOWER HUTT.

Dear Mrs Bartholomew

Widows Benefit 221741285

Your accommodation benefit has been cancelled from 22.7.86 as the income you receive from the job you commenced on 22.7.86 precludes entitlement to the benefit.

The revised assessment of your accommodation benefit is as follows:

Earnings = \$38.00 p.w.	Accommodation Benefit	\$26.00	
Income over \$12 pw reduces	Reduction	\$26.00	
Accommodation benefit \$1 for \$1	Amount payable		NIL

Your accommodation benefit has been paid to 18.8.86 and as a result has been overpaid by \$64.00 for the period 22.7.86 to 18.8.86.

As requested by you this overpayment is to be offset from your widows benefit at the rate of \$4.00 p.w.

Therefore the two weekly instalment from 25.5.86 to 1.12.86 will be at \$133.50.

From due date 15.12.86 payments will be restored to the normal rate of \$141.50 per two weeks.

If you are dissatisfied with the decision above, you are entitled to have the decision reviewed by the Social Security Commission.

If you wish to have the decision reviewed you should apply in writing within three months, setting out briefly the grounds on which you object, to the decision. A form for this purpose is available from any office of this Department (SW 143 Application for Review of Decision).

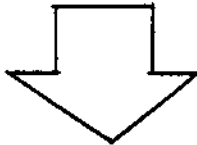
Yours faithfully

Example of cash refund letter next page.

CASH REFUND

EXAMPLE OF LETTER CONTENT

If recovery of overpayment to be by cash refund (e.g. benefit cancelled) instead of offset include wording something like this in the letter:



"..... as a result of your widows benefit has been overpaid by \$.....

A refund of this amount is now required.

This may be paid to the Revenue division of this office. If making your payment by post please quote the benefit number above. If paying at this office please bring this letter with you.

If you are unable to make this repayment in a lump sum, regular instalments would be acceptable.

Your prompt attention is required in this matter .....

Include review rights etc.

WHEN BENEFIT HAS BEEN OVERPAID DON'T OVERLOOK THE FOLLOWING

1. OFFICE ERRORS

If the overpayment is due to an office error

- The officers concerned must record their explanation on the file.
  - There is provision to write the debt off rather than arrange recovery.
  - Special letters etc are required.
  - Part Q of the Pay Manual.
- 

2. FRAUD

Most overpayments are unintentional.

But

If it is apparent that the collecting of any bank credit to which not entitled was a deliberate attempt to defraud the case must be:

Discussed urgently with a senior officer. In such instances the Police are required to be notified. Local procedures apply - in some districts the office solicitor is notified.

---

3. FAILURE TO REFUND

If beneficiary has elected to refund the overpayment by cash refund but after reminders fails to do so, discuss with senior officer to consider commencing recovery by ofets. - Revenue section may initiate this action.

---

4. OFFSET

(Referred to as forfeiture)

- A. S.W. 220 - place at front of file.
- B. If benefit later cancelled and offset not completed - Request cash refund.
- C. See section 2 Pages 44 - 47 D.P. Manual. - recovery by offset.
  - (i) Minimum period 8 weeks. Maximum period 2 years.
  - (ii) Expiry must be end of a pay period.
  - (iii) Odd amounts - recover locally.
  - (iv) Watch children attaining 15 years during offset period.

5. BENEFICIARY LEFT N.Z.

For overpayment recovery see Para Q87 Pay Manual.

1.

BANK CREDIT NOT MADE:

Reference: DP Manual 6.46

- Procedure
- (i) Beneficiary is not usually at fault. Be sympathetic to her predicament. Action urgently.
  - (ii) Clearly establish - what kind of payment involved  
- what due date  
- no form need be completed.
  - (iii) Get file - if in order ----.
  - (iv) Check register of issues - if in order ----
  - (v) Phone bank - ascertain position.
  - (vi) If bank able to rectify situation without delay - end of problem and refer beneficiary to bank.
  - (vii) If credit has not been made and beneficiary requires urgent payment consider S.N.G. otherwise arrange payment by D.D.C. (SW55).
  - (viii) Issue letter similar to SW 19B format.
  - (ix) If D.D.C. issued or further credit made for same due date, follow up missing credit.

NOTE

- (a) The duplicate payment action should not be taken until the actual due date of payment
  - (b) If payment interrupted for a due date because of review action and beneficiary complains.  
- refer to Senior Officer to consider urgent payment.
- But all efforts must be made to avoid this.

## SELF-TEST QUESTIONS

Do not write on this page

If you are not sure of the answer to any question read the Section again. You will find the answer there.

1. What is the maximum period of recovery for an advance of benefit?
2. The expiry date of the advance must be?
3. What is the pre-requisite for recovery of overpayment by offset?
4. Do we automatically recover overpayments due to office error?
5. Is it necessary to be sympathetic to beneficiary's requests to have requests for duplicate payment issued without delay?

ANSWERS

1. 2 years.
2. The last day of a four weekly pay period.
3. The agreement by beneficiary of the amount to be recovered each week.
4. No. In most instances these overpayments may be written off.
5. Yes. Efforts should be made to arrange payments on the day of application, but not before the due date.



# TELEPHONE RENTAL CONCESSION

## References:

- S. 52 Supp Services Manual.
- Section 69A Social Security Act

## What is the Concession

Reduces Post Office telephone rental by half while in receipt of benefit.

Requirements:(in brief) - Phone in own name and meeting cost of rental.

---

## Procedure

1. Beneficiary to complete S.W. 120 Application
  2. No Application register.
  3. Post Office to complete portion of S.W. 120. (See next page.)
  4. If application received without this completed - Send S.W. 120 to Post Office.
  5. S.W. 120 on file. You complete bottom portion - See example next page.
  6. Grant date: (S. 73 Supplementary Services Manua)
    - A. 1st day of rental period in which application received in S.W.D. or P.O.
    - B. Watch that new connections dont start earlier than the lease commencement date.
    - C. New Applications - of course the concession can't start prior to the benefit grant.
  7. You will need: Copy of Post Office rental periods and deadlines.
  - 7A. If can't meet Post Office deadline dates - pay by Daily Direct Credit (SW 55).
  8. S.W. 747 - show B. 93
  9. Complete S.W. 121
    - A. Original is beneficiary's notitication
    - B. Duplicate (S.W. 121A) goes to Post Office
      - Approving officer to sign
      - Dont forget office date stamp.
  10. On receiving the S.W. 121A the Post Office reduces beneficiary future telephone accounts by half.
  11. Note file cover and attach tag to file showing - "Telepnone Concession"
- 

## CANCELLATION OF CONCESSION (in brief)

1. Reference (S.88 Supp Services Manual)
2. Send S.W. 124 to Post Office
3. S.W. 747 - D.93
4. Change of address? Letter to beneficiary. Suggest re application if has phone at new address.

Forms examples - next page



# OTHER SUPPLEMENTARY SERVICES

Supplementary services is a term for benefits and grants that may be paid in addition to the widows benefit.

It is IMPORTANT that you be aware of the qualifications for these benefits as if it appears applicant or beneficiary may have entitlement an application MUST BE INVITED.

Also if beneficiary complains of financial problems the possibility of supplementary service entitlement must be looked at.

Listed on the next few pages are the supplementary services that may be relevant to a widows beneficiary.

NOTE: General Qualifications only are outlined. Space does not permit detailed explanation or the setting out of application processing procedures.

However Manual References are quoted and you should make an effort to familiarise yourself with those instructions.



TYPES OF PROVISION

1. ACCOMMODATION BENEFIT

To assist with accommodation costs such as rent or mortgage, rates etc where beneficiary has limited income and assets.

See page 139.

---

2. SPECIAL BENEFIT

To assist where beneficiary is unable to afford essential living expenses. Amount payable depends on circumstances.

See page 146.

---

3. TELEPHONE CONCESSION

Reduces telephone rental accounts by half.

See pages 213-214.

---

4. ADVANCE PAYMENT OF BENEFIT

Lump Sum payment to meet expenditure like clothing purchases. Continuing benefit payments are reduced to effect recovery.

See page 199.

---

5. SPECIAL NEEDS GRANTS

Single payments made to meet immediate living expenses. Usually issued before benefit grant.

References: - Part B Supp. Services Manual. C.M. 1982/8.

Also available for: 1. Situations such as loss of benefit monies or to avert electric power disconnection in extreme cases.

2. Dentures and spectacles (where hospital board unable to provide).

3. Urgent clothing and bedding purchases etc.

Cash assets should not exceed \$300 - or \$600 if there is a dependent child. (Increased by \$100 for each subsequent child)

Where advance of benefit would cause hardship

Adapt S.W. 236 Application form.

\*

continued next page.

6. PROVISIONS FOR THE DISABLED

If beneficiary or her dependent children have a disability there may be entitlement to one or several of the following provisions:

A. DISABILITY ALLOWANCE:

Reference: Part I Supplementary Services Manual  
C.M. 1981/69  
Application form: S.W. 247  
Rate: \$30.00 p.w. (maximum)  
General Qualification: Disability that creates extra expense.

---

B. AID TO FAMILY/ALTERNATIVE CARE:

Reference: Part H Supplementary Services Manual  
Application form: S.W. 251  
Rate: Reasonable costs of alternative care.  
General Qualifications: Caring for seriously disabled person.  
Alternative care permitted for up to four weeks in any one year.  
Purpose: To provide relief from the emotional and physical strain involved in providing care for a seriously disabled person.

---

C. HANDICAPPED CHILDS ALLOWANCE:

Reference: Part F Supplementary Services Manual  
Application form: S.W. 243  
Rate: \$22.00 p.w.  
General Qualification: Child must be seriously mentally or physically disabled.

NOTE The allowance is included with normal family benefit payments.

---

D. GRANTS ALTERATIONS TO THE HOME:

Reference: Part G Supplementary Services Manual  
Application: No form. Written request only.  
Payment: Suspensory loan.  
General Qualifications: Essential alterations required in order  
- to accommodate wheelchair etc  
- to provide handrails handgrips etc  
- to assist disabled person by altering plumbing the kitchen or electrical fittings.  
- add additional bedroom for disabled person.

---

Continued next page

**E. AIDS AND APPLIANCES:**

**Reference:** Part A4 Supplementary Services Manual  
**Application:** SW 283  
**General Qualifications:** If aid or appliance not available free of charge, the Department may meet the cost.

---

**F. TRAVELLING AND ACCOMMODATION EXPENSES:**

**Reference:** Parts A2, A6 and R Supplementary Services Manual  
**Application:** Adapt form S.W. 236 for Limb Centre visits otherwise no form - written request required.  
**General Qualifications:** Reasonable costs may be met where amputee required to visit a LIMB CENTRE or travel to:  
- undertake medical treatment or examination  
- be interviewed by Departmental staff  
- be assessed etc in connection with disability  
- undergo any period of assessment work experience training or education.

---

**G. CAR LOANS:**

**Reference:** Part A5 Supplementary Services Manual  
**Application:** Adapt form war 86 and SW 4 (statement of income and assets)  
**What is available:** \$9,350.00  
**General Qualifications:** Where vehicle is essential for disabled person to undergo rehabilitative training for employment or enable employment to be maintained.

---

Other Supplementary Services available next page.

7. REMISSION SCHOOL CERT. FEES:

Reference: S.11 - 14 Supplementary Services Manual

The Department investigates and report for the Department of Education.

---

8. FIRE LOSS:

(Payable  
under  
special  
needs  
grants)

Reference: C.M. 1982/8.

Part B. Supplementary Services Manual  
Adapt from S.W. 236.

Application:

General Qualifications:

Depending on circumstances grant may be made where household and personal belongings lost as a result of a fire, and there is not adequate insurance.

---

9. REPAIRS ADVANCE:

Reference:

Part O. Supplementary Services Manual

Application:

No form. Written request only.

Amount:

Loan of up to \$2,100.00. Interest is payable but loan always repaid when home sold.

Qualifications:

- For essential repairs and maintenance.  
or
  - For essential services to the premises  
or
  - Conversion domestic heating equipment  
(\$500.00)
  - Property must be owned by beneficiary.
- 

10. HOME HELP:

Reference:

Part K Supplementary Services Manual.

Usually applies to elderly persons. However if beneficiary is sick and help is needed in the home the Department may meet the cost of the help.

Adopt form S.W. 236 for application purposes.

---

continued next page

11. SOCIAL WORK SERVICE:

If beneficiary requires assistance or guidance with child care the Departments Social Work Division should be contacted. Social workers can also help with other personal problems even though not directly concerned with the widows benefit.

---

12. CONCESSIONS AVAILABLE FROM OTHER ORGANISATIONS:

Don't overlook referring beneficiary to the following places:

<u>Organisation:</u>	<u>Concession</u>
A. CITY COUNCILS	- Reduced bus fares (some places)
B. STATE INSURANCE	- Reduced insurance policy premiums.
C. MAORI AFFAIRS DEPARTMENT	Housing Loans

---

13. MEDICAL FEES:

Beneficiary is issued with a certificate at grant which entitles her to lower Doctors fees and exemption from prescription charges.

Reference: S.15 Supplementary Services Manual.

---

14. FINALLY:

BUDGETING SERVICE:

IMPORTANT:

If beneficiary is having financial troubles. DON'T OVERLOOK that a budgeter could be of value. If there is not a budgeter attached to your office refer beneficiary toon fteloa sevice Ctzen advice bureau can usually assist.

Summary next page.



## SELF-TEST QUESTIONS

Do not write on this page

If you are not sure of the answer to any question read the Section again. You will find the answer there.

1. What is the application form for a telephone rental concession and what are the main qualifications.
2. If beneficiary because of some physical handicap or sickness is required to make regular visits to a hospital which involves additional expense - what additional assistance may she be entitled to?
3. If beneficiary owns her own home, and seeks assistance to have a leaking roof repaired or renewed, what type of application should be invited?
4. If you come accross a file where there appears to be entitlement to accommodation benefit what should you do?
5. Beneficiary is in need of urgent clothing and bedding, but an advance of benefit would cause hardship. What should you do?

ANSWERS

1. Form S.W. 120. The telephone must be in beneficiary's own name and she must be meeting the rental cost.
2. Disability allowance - invite an application.
3. Application for repairs advance.
4. Invite an application.
5. Take an application for special needs grant on an adapted form S.W. 236.

# Defacto Allegation

## WHAT TO DO

### 1. INTRODUCTION

Under Section 63(b) of the Social Security Act there is authority to cancel a widows benefit if beneficiary has an association with a man which is in the nature of a marriage.

The rationale here is that beneficiary is not placed in a better position than a woman who has lost her husband, i.e., receiving both a widows benefit and support from a "husband".

### THE ALLEGATION

From time to time people, mostly anonymously, will write in or phone the office complaining that beneficiary has set up house with a male.

What you must keep in mind is that it is not unknown for such complaints to have little foundation, and even be malicious or mischievous.

Use your common sense - Entitlement to widows benefit is not restricted by a beneficiary associating with a person of the opposite sex. (People are entitled to thier privacy.) We are only concerned if the relationship is like that of a marriage.

Remember Some widows remarry and legitimately receive their widows benefit up until the marriage date.

See next page for procedure

PROCEDURES (following allegation)

1. If phone call - ask for name, address and phone number of caller. Explain that the details provided are confidential to the department, and as such beneficiary will not be told. Don't insist if wishes to remain anonymous. Also obtain alleged defacto's:

- Name and other address
- Employer's name
- How long associating
- Watch mistaken identity.

Also, get caller to repeat beneficiary's name and address.

2. Refer letter or details of phone call (written up) with file to Senior Officer without delay.
3. No contact to be made with beneficiary at this stage:
  - The allegation may be untrue.
  - It is a sensitive issue. The association may be an innocent one.
  - Beneficiary may be alerted and evidence covered up.
4. Also, on no account is payment of benefit to be stopped following an allegation, without investigation, or on the basis of circumstantial evidence.
5. A Senior Officer, usually the Assistant Director or Director, will instruct as to what enquiries are to be made or if the matter is to be dropped.
6. If no action is directed you have no authority to start your own amateur detective campaign. Leave the file and get on with your other work.

NOTE: Decisions to stop payment, to continue or cancel benefit in these circumstances are not made lightly and not without beneficiary being given ample opportunity to state her case.

See next page - allegation beneficiary in employment.

# WHAT TO DO IF ALLEGATIONS RECEIVED THAT BENEFICIARY IN EMPLOYMENT

1. The principles on the previous page apply.

2. Allegation by phone:

Request-callers name and address - don't insist if wishes to remain anonymous. Explain that the details provided are confidential to the department and as such beneficiary will not be told.

Obtain this information:

- Where beneficiary working, (full name and address of employer).
- How long working for.

3. Credibility:

a. Remember the allegations may not be true.

b. Intention:

Beneficiary may only be intending to earn up to \$2,600.00 (\$3,120.00) and then declare the income at renewal.

It is desirable that we be informed of all changes in circumstances but in the above situation there may be no intention to deceive.

4. Refer Notes of phone call or if letter, (both on file) to senior officer without delay.
5. ON no account prior to above referral is payment to be stopped or beneficiary contacted.
6. Senior officer may decide to check direct with the employer, and then advise how to approach beneficiary

#### IMPORTANT:

7. If no action is directed - you are not permitted to start your own private detective campaign.

Get your priorities right.

Energies should be put into arranging payment in other cases where there is obvious entitlement rather than wasting time on cases where there is an unfounded suggestion that entitlement is in jeopardy.

# LISTS RECEIVED FROM THE DATA PROCESSING CENTRE

References:      Data processing  
                                 Manual Paragraphs

1.	Change List	-	3.2
2.	Rejection List	-	3.9
3.	Expiry List	-	3.26
4.	Register of Issues	-	5.15
5.	Renewal List	-	4.295
6.	Master Record Listings	-	3.30

These lists are the most important others are produced, and reading the Data Processing Manual will make you familiar with their function.

Why the need for the computer to produce  
the above lists?

See below.

Also explained briefly on the next  
few pages is what action if any the lists require.

---

## 1. CHANGE LIST

- Large paper list produced each week.
- Shows changes to Master records, and payment requests following action of input forms
- For reference or information purposes only.

---

## 2. REJECTION LIST

- Produced daily via office terminal
- Shows inputs form details which due to incorrect information have not been accepted.
- The rejected input forms are attached to the list.

### Action Procedure:

- A. Senior Officer extracts messages from the list.
- B. As well as the rejected input form, in some cases attached may be a copy of master record details.
- C. These papers must be put on the file.
- D. Your job is to correct the error by completing a further input form -  
ACTION IMMEDIATELY.
- E.      (i) Does payment need adjusting?  
          (ii) Deadline missed?  
WATCH      (iii) Overpayment?  
              (iv) Local pay action required?
- F. Notify beneficiary if necessary.
- G. Graded Officer to clear list.

Expiry list next page

### 3. EXPIRY LIST

- Entries extracted by a senior officer
- Extract then to be placed on the benefit file
- You job is to find the file and do the necessary review action.
- The messages or entries on the list that require action usually comprise of the following:

#### MESSAGE

#### BRIEF OUTLINE OF ACTION

- \*
- |    |                                |  |
|----|--------------------------------|--|
| 1. | Child attaining 15 years       | child of age action see Page 157.  |
| 2. | Beneficiary attaining 60 years | If no dependent children invite application for National Superannuation. |
| 3. | Partial forfeiture             | Overpayment recovered - Automatic increase or resumption                 |
| 4. | Full forfeiture                | Letter to beneficiary.   |
| 5. | Bring Up                       | File will show why bring up made - take necessary action.                |
- NOTE Avoid unnecessary work - If the action is completed before the related bring up, delete the bring up notings from the master record.
- |    |  |  |
|----|--|--|
| 6. | Benefit payment stopped - over 2 years | Unless file indicates benefit to be resumed - arrange cancellation see page 167. |
| 7. | End of School Year action              | Child of age action see Page 157.  |

Entries on the list are cleared by a Senior Officer

- \* If youngest child attains 15 years special letter pointing out reduction in benefit required.

Format of letter should be BASED on the example D.102 four weekly manual.

Master Record Listings etc next page.

#### 4. REGISTER OF ISSUES

- Paper list
  - Produced prior to each due date
  - Shows - payment for that due date and  
- address sent to or bank account credited.
  - No action required. Reference purposes only.
  - Essential for enquiries regarding missing payment etc (see page 192).
- 

#### 5. RENEWAL LIST

This has already been discussed on page 150.

---



**REVIEWS**

# APPEAL AND REVIEW RIGHTS

Reference: Part Y Four Weekly Manual  
Review: Section 10(6)(7) Social  
Appeal: Section 12(J)(k) Security  
Act

## WHAT ARE THEY?

If beneficiary or applicant is dissatisfied with a decision she can formally apply to have that decision reconsidered.

Review: Is an application to the Department to have a District or Head office decision reconsidered.

Appeal: Is an application to the Social Security Appeal Authority to have a Head Office (Social Security Commission) decision reconsidered.

NOTE: The appeal authority comprises of people independent from the Dept and is administered by the Tribunals Division of the Justice Department.

---

TIME LIMIT Applications must be lodged within three months of the decision that is to be reconsidered.

---

## NOTIFICATION OF REVIEW RIGHTS

Beneficiary must be notified of review rights in these circumstances:

- (i) Following all new applications.
- (ii) Following all reviews.
- (iii) All changed amount renewals.

You notify the review rights by adding this message to the letter that advises of the above action.

"If you are dissatisfied with the decision above, you are entitled to have the decision reviewed by the Social Security Commission.

If you wish to have the decision reviewed, you should apply in writing, within three months, setting out briefly the grounds on which you object to the decision. A form for this purpose is available from any office of this Department (S.W. 143 - Application for Review of Decision)."

Procedures next page

REVIEW PROCEDURE

1. If beneficiary complains verbally about a decision an application for review should be invited. Letters complaining of a benefit decision must be accepted as a "review of decision" application.

2. TYPES OF APPLICATION:
- A. For S.W. 143 - TAKE CARE not to issue Appeal form S.W. 144.
  - OR
  - B. Letter - should show reason for review.  
- Endorse or stamp it ...

"Application for review".

3. Enter in register.

4. Decision to be reconsidered at higher level than original decision given.

5. Any new information? - investigate first.

6. If decision wholly favourable.

(Wholly favourable means = Meets in full the point on which the request for review was based.)

- A. Rectify - file action.
- B. Letter to beneficiary pointing out matter rectified.
- C. Clear register.

---

7. If unable to give wholly favourable decision submit file to senior officer.

8. File now with senior officer

- | A. <u>Wholly favourable decision given:</u>                     | B. <u>Decision Partially or Wholly unfavourable</u>   |
|---|---|
| (i) File returned to you  | (i) Notify applicant.   |
| (ii) take appropriate action<br>e.g. perhaps issue arrears etc. | (ii) The notification wil include advice of appeal rights, and right to have decision reviewed by Social Security Commission. |
| (iii) Letter  | (iii) File returned - some corrective action may be necessary.  |
| (iv) Clear register   | (iv) Clear register   |
|   | (v) If APPEAL lodged - see next page.   |

## APPEAL PROCEDURE

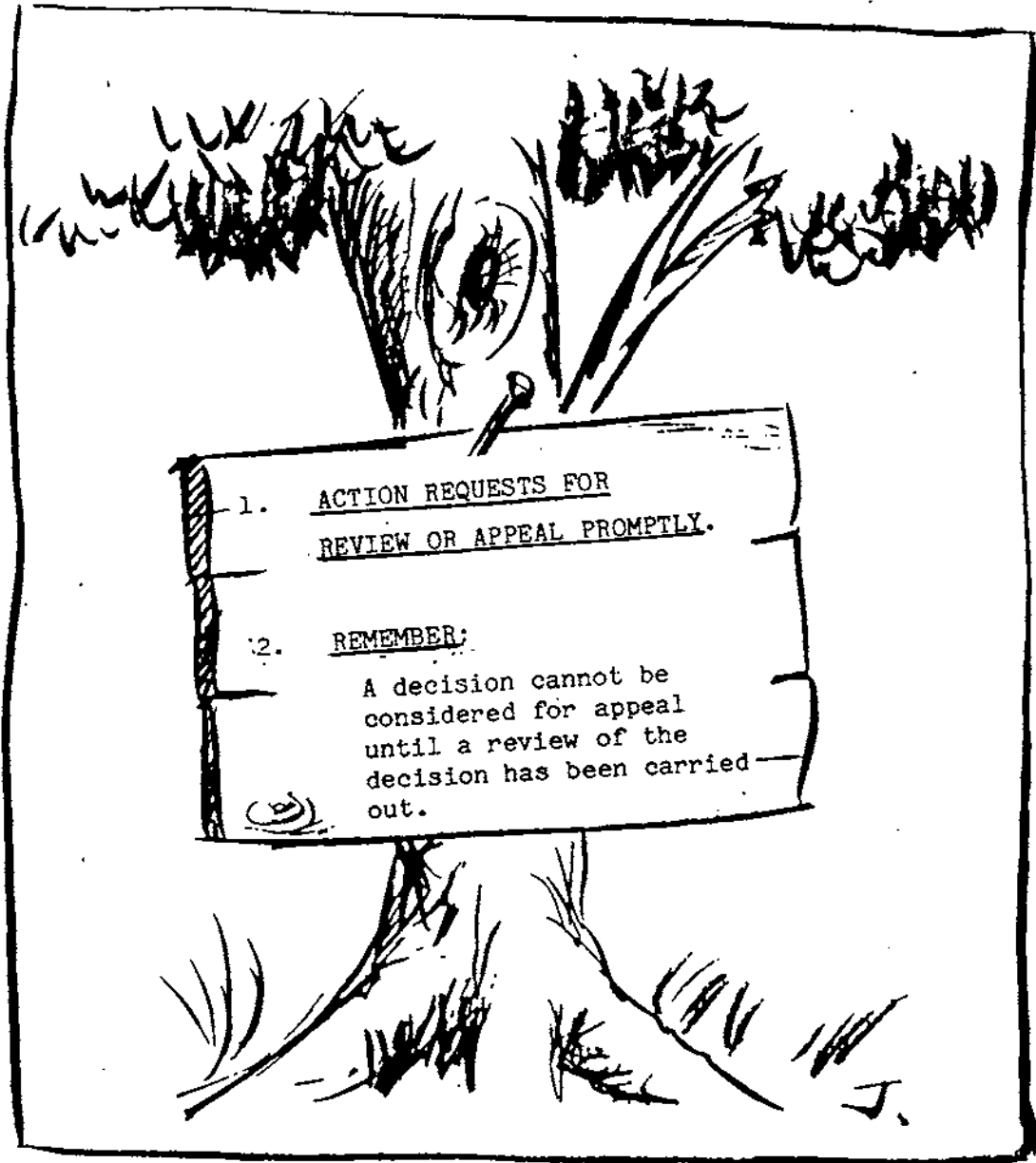
1. First read review procedure previous page.
2. Before APPEAL lodged - application for review must be lodged and decided, and reviewed by Social Security Commission.
3. Applications: Form S.W. 144  
or  
Letter - should show reason for appeal.
4. Don't enter in register at this stage.
5. Send the application for appeal direct to:  
  
The Secretary  
Social Security Appeal Authority  
Tribunals Division  
Department of Justice  
Private Bag  
Postal Centre  
WELLINGTON
6. Authority secretary sends copy of appeal to Head Office.
7. Head Office will A. Enter in their register.  
B. Send the copy and memo to district office.
8. Appeal details NOW entered in local register.
9. Get file: If no review carried out (see previous page)
  - A. Tell Head Office
  - B. H.O. will point out to Authority that no appeal lies.
  - C. Enter in review register.
  - D. Review procedures (previous page ) apply.
10. CASE ALREADY REVIEWED BY HEAD OFFICE:-(ensure it is for the point appeal lodged in respect of):
11. Send file promptly to Head Office - Ensure covering memo clearly shows file forwarded for Appeal purposes.
12. Watch - Before above if there is any fresh information investigate and take corrective action if necessary.
13. Now in possession of the file H.O. will prepare a report for the authority and may be represented at the actual appeal hearing.
14. NOTE:
  - A. Beneficiary may be required to attend the appeal hearing - see Para Y.59A re expenses refund.
  - B. Beneficiary is referred to as the appellant.
15. After the appeal hearing - the Authority will inform beneficiary of the decision.

### Appeal Allowed

- A. H.O. will issue instructions to rectify.
- B. Actioned at district office.
- C. Notify beneficiary commence with these words ... "In accordance with the decision of the Social Security Appeal Authority ..... date ....."

### Appeal Disallowed

- A. H.O. will return file with copy of the appeal decision.
- B. No need for notification. Already issued by Appeal Authority.



# MISCELLANEOUS PROVISIONS

(In Brief)

## 1. BENEFICIARY IMPRISONED

### Reference:

- Section 76(1) Social Security Act.
- Part P Miscellaneous Provisions Manual.

- A. No Dependents:
- Suspend benefit from day after taken into custody.
  - For forms to use etc - principles page 160 apply.
- B. Dependent children:
1. Benefit shall be suspended in the interim. (Page 160)
  2. Prime consideration is to be given to the welfare of the children.
  3. May require discussion with Social work division.
  4. Whole or part of the benefit may be paid to persons caring for the children. Para P2.17 to 2.24 Miscellaneous Provisions Manual tell you what to do.
  5. Action decision without delay.

## 2. BENEFICIARY DIES

### Reference:

- Section 61D to 61DG of Social Security Act
- Part B Miscellaneous Provisions Manual.

- A. No Dependents:
1. Cancel benefit from day following date of death.

- B. Dependent Children:
- (i) Cancel benefit from day following date of death. - Use form S.W. 242.
  - (ii) Dependent children entitled:
    - (a) Any instalment unpaid prior to death.
    - (b) Terminal benefit.
    - (c) Payment after death (but any Terminal Benefit paid would be deducted from entitlement).

### NOTE:

Any letters following death should express sympathy.

1. Following beneficiary's death the first consideration must be the childrens welfare ... adequate care and cash? Discuss with Social Work division if necessary, consider orphans benefit etc.

### IMPORTANT

2. BEFORE TAKING ANY ACTION FOLLOWING ADVICE OF DEATH - ENSURE IDENTITY IS 100% ESTABLISHED - don't action the wrong file.



## SUBMITTING FILES FOR A DECISION

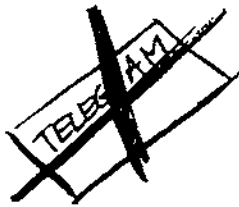
### LOCAL

Directions from Senior Officers may be obtained verbally.

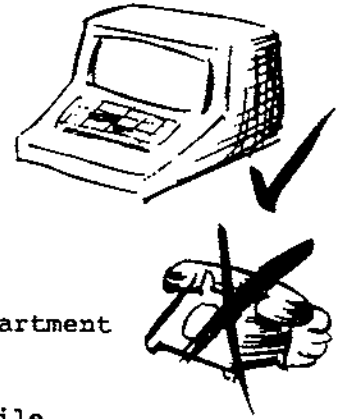
However occasions do arise where the complications of a case require details to be submitted in writing for a decision.

### How to set out a Submission

- A. Ensure your writing is legible.
- B. Say WHY you are submitting the case.
- C. Number your paragraphs and use sub headings.
- D. Mention that you have checked the relevant manual or circular instruction. Quote the paragraph number etc.
- E. EXCLUDE irrelevant information.
- F. ALWAYS end with a RECOMMENDATION.



# SENDING MESSAGES TO OTHER OFFICES



## References:

- F.62 Administration Manual
- C.M. 1981/92

There are a variety of reasons why another offices in the Department may have to be contacted urgently.

- e.g. - Obtaining a file on loan  
- Requesting transfer of a file  
- To check employment details from previous employer etc.

TOLL CALLS AND TELEGRAMS MUST BE AVOIDED.

If there is no urgency and detailed explanations are required send a letter but otherwise:

NETWORK MESSAGES should be sent.

## HOW TO SEND A NETWORK MESSAGE:

1. Fill out input form S.W. 161
  - A. Print in block letters - Neatness essential
  - B. In the actual message section:
    - leave a space between words.
  - C. Also in columns 1 & 2 of the message section show Designation and Section of person sending message, and same details of person message intended for.
  - D. Person preparing the message must sign the S.W. 161
  - E. ALL messages must be APPROVED at 007.102 level.

## HOW THE MESSAGE GETS THERE:

Keyed in via the local computer terminal, and received in the other via the printer attached to the terminal. Local procedures apply in delivering the message to your desk.

Once the S.W. 161 details are keyed the form is returned for placement on the benefit file ... check date and time of transmission shown.

## FOR EFFICIENT OPERATION OF THE SYSTEM

1. If reply needed mention date it is required by in the message.
2. If you receive a message that needs a reply think of others and **ANSWER WITHOUT DELAY** - mention you are replying to their message, and ensure the message is addressed to the other sender.
3. Send an INTERIM REPLY if necessary.
4. Once received via the local printer messages should be delivered quickly to the section concerned.



# TELEPHONE BEHAVIOUR

As with letter writing the telephone presents us with much of our public contact.

Remember we have an aim of friendly helpful courteous service.

so therefore when using the phone  
Ensure:

## Incoming Calls

- (i) Answer promptly and politely.
- (ii) If the phone rings on somebody else's desk and that person is not there - Don't ignore it and hope somebody else will answer or it will stop ringing. The person Closest is to Get Up and answer it.
- (iii) Introduce yourself like this: "Smith, Widows Benefit section can I help you." Don't say ... four' weekly benefits. This term only confuses outsiders - if you (i) work on a section where several benefits are handled it is best just to answer like this ... "Good Morning/ Afternoon Smith speaking can I help you."
- (iv) If you have to break the conversation to obtain information - use your common sense and don't leave the person hanging on for a prolonged period - Go back and explain you may be some-time. Perhaps suggest you will phone back.
- (v) If you do say you will phone back - keep your promise and do it.  
(continued next page)

## Outwards Calls

- (i) Introduce yourself pleasantly and say why you are calling e.g. "Hello could I speak to Mrs Jones please, Good, morning Mrs Jones I am Smith of the Social Welfare Department and wish to talk to you about your recent application for widows benefit .....
- .....
- Close the conversation with "Goodbye, thank you"
- (ii) Don't disappear if you have asked the operator to place a Toll Call.

## General

- If you are going to be away from your desk for a while let the telephone operator and somebody nearby know where you can be contacted and when you will be back at your desk
- (ii) When you do get back to your desk let the operator know.
- (iii) Keep a telephone directory by the phone and a list of frequently called numbers.

(Continued Next Page)

Incoming Calls (continued)

- (vi) The requirements to be pleasant etc at the counter also apply to telephone conversations. Also speak clearly.
- (vii) If you answer somebody else's phone and the caller wants to speak to that absent person, apologise and without hesitation ask if you can help or take a message.
- (viii) Make sure you pass messages on. Leave a legible dated note on the absent person's desk. Don't forget the number that has to be called.

General (continued)

- (iv) Your friendly helpful attitude can't be seen. It all relies on the tone of your voice.
- (v) If you are cut off the person who initiates the call should ring back.
- (vi) DON'T INTERRUPT your phone conversation. If there are two calls for you, finish the first. A message should be taken for the second call.



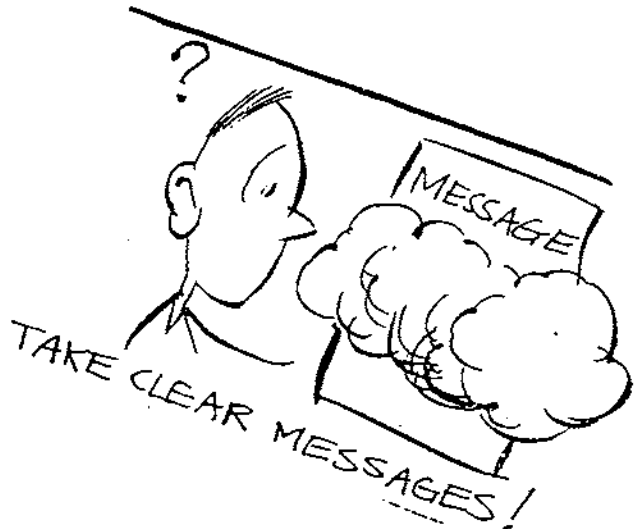
IDENTIFY YOURSELF!

The requirements on this and the previous page do appear basic but observe the telephone manners in your office.

- if you had to rate them out of ten what mark would you give?

FINALLY:

1. Don't treat a telephone call as low priority. It may be more important than the work it interrupts.
2. Any Information:
  - Get it into writing quickly.
  - Not all memories are reliable.
  - Avoid scrap paper and always sign and date your note.



# WORK METHODS

You will clear your work quicker if you keep a tidy desk, and have an orderly approach.

1. Action files according to their PRIORITY
  - Don't just do the next one in the bundle.

---

2. Don't keep a "HARD BASKET" - If you don't know what to do - Ask - Don't put the file at the bottom of your tray. It won't go away.

---

3. PLAN what you are going to do EACH DAY. Perhaps do the harder files early morning and the easier ones later afternoon.
  - Set yourself REALISTIC TARGETS and try to achieve them.

---

4. You should know whose file you have on your desk and what NEEDS DOING TO IT.

---

5. Don't overload your memory. AT ALL TIMES record notes on minute sheets and place on the file.

---

6. When absent on sick or annual leave: will others be able to FIND YOUR FILES without trouble? - and easily determine the file's up to date position?
  - Are your trays LABELLED in, out etc.

---

7. Loose Papers  
Keep in alphabetical order. Have a daily search plan. ANY older than 2 weeks see your senior officer.

---

8. Does your desk resemble an antique shop or archives library?
  - Get rid of useless old equipment
  - DESTROY outdated charts, calenders, booklets etc.

---

9. Each office has a stationery room - your desk should not be one
  - Don't have more than a FORTNIGHTS SUPPLY OF FORMS etc, around yourself.

---

10. Utilise the bring up or expiry system for files (Except applications) you don't immediately need. THE FILING SYSTEM SHOULD BE YOUR HOLDING TRAY.

---

11. Remember:
  - Check those outstanding applications each week.
  - Any other unactioned files or papers older than two weeks must be discussed with your senior officer.
12. That counter Buzzer  
Answer promptly if the receptionist or usual person is not there. Don't wait for it to ring again or sit tight and hope some other person will answer it.

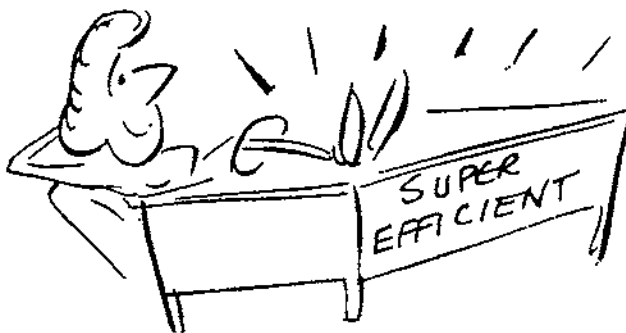


see next page.

# WORK METHODS (continued)

SENIOR OFFICERS

REMEMBER ....



1. Before 'filing' a file - is ALL action complete  
- Do any bring ups or expiry dates need cancelling
2. If file is bulky - arrange split into two parts.
3. Has the cover sheet correct name and number.
4. Those computer print outs and other lists:

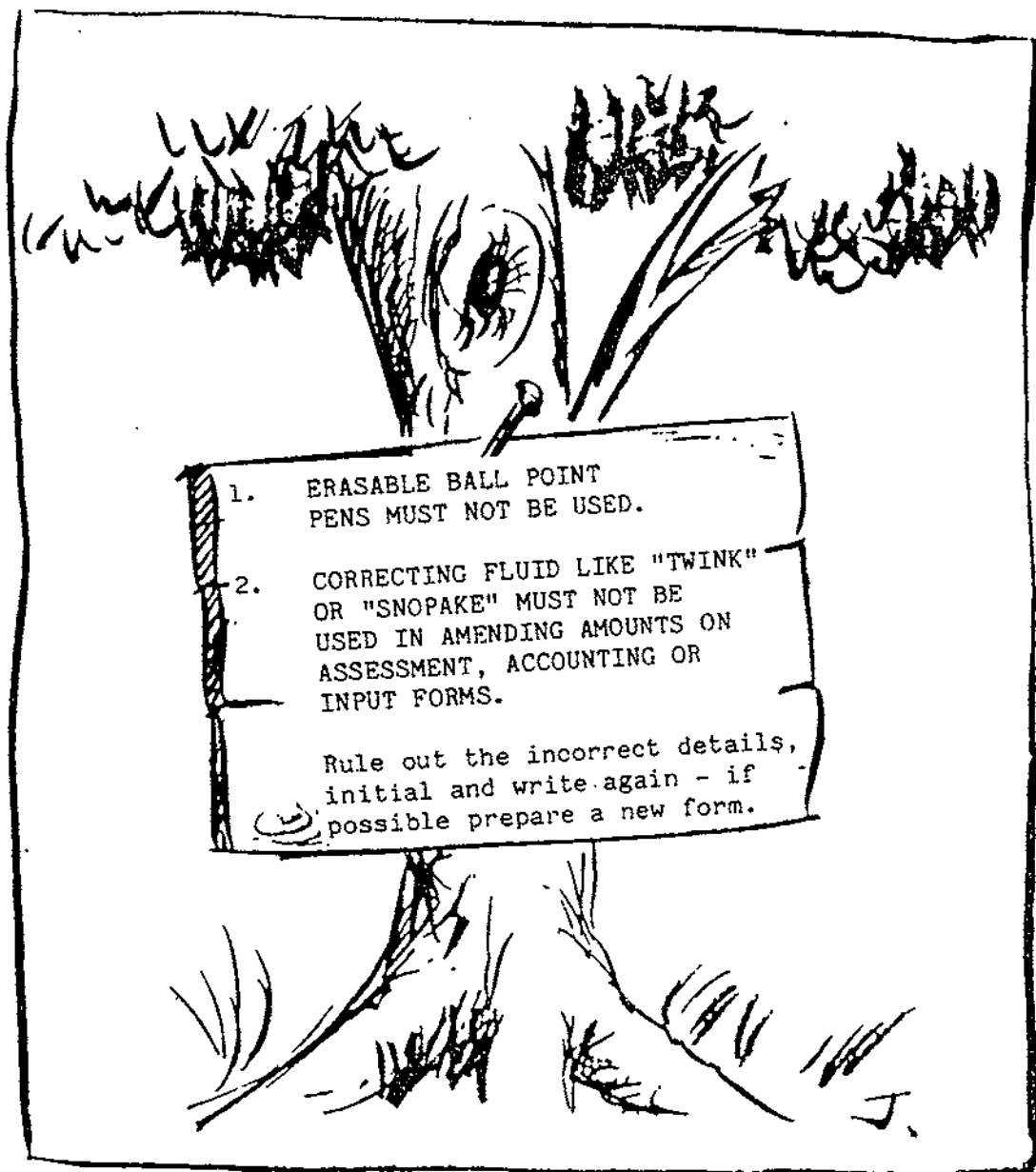
Store neatly  
in a central point  
and label their position

5. Applications - check them each week.

See page 51.

6. Check your clerks' work daily - never let files build up on the basic grader's desk.





1. ERASABLE BALL POINT PENS MUST NOT BE USED.
  2. CORRECTING FLUID LIKE "TWINK" OR "SNOPAKE" MUST NOT BE USED IN AMENDING AMOUNTS ON ASSESSMENT, ACCOUNTING OR INPUT FORMS.
- Rule out the incorrect details, initial and write again - if possible prepare a new form.

# ARE YOU PROPERLY ATTIRED?

The following is an  
extract of a Head Office  
instruction issued  
12.1.81:

1. "General neatness and tidiness of dress is expected at all times.

2. Men

(a) Men are expected to dress in neat attire including a neck tie.

Casual, open-neck shirts, beach wear, well worn shabby jeans and corduroys do not come within this specification.

(b) Ties may be discarded in hot weather but not when attending to the public.

(c) Dress shorts and socks may be worn.

3. Women

Fashion jeans and smart corduroys meet the required standard but not frayed and patched jeans or corduroys.

4. Footwear

Bare feet, jandals and bedroom slippers are not acceptable."



## SELF TEST QUESTIONS

### Do Not Write on This Page

If you are not sure of the answer to any questions read the Section again. You will file the answer there.

1. What is the difference between the change list and register of issues?
2. Before an appeal to have a decision reconsidered is lodged what must be done?
3. Before taking action following death what must be satisfied?
4. What is the purpose of the inter office computer network system?
5. If the phone rings on somebody elses desk and the person is not there, what would you do?
6. Where do you file oudated charts, calendars, booklets etc.?

## ANSWERS

1. The change list shows changes made to the master record. The register of issues is a list of all payments made for a due date.
2. An application for review must be lodged and decided.
3. Identity of deceased person is 100% established. Don't action the wrong file.
4. To save time in not having letters prepared and to save costs in avoiding toll calls and telegrams.
5. You should get up and answer it. Take a message. Leave a neat dated message on the absent persons desk. Is the callers name and number to be rung clear?
6. In your rubbish tin.



# ABBREVIATIONS

To make yourself clear  
avoid them but if you  
encounter some this is  
what they mean ...

ACC.	Accident Compensation (Corporation)
ACCOM. BEN.	Accommodation Benefit
A.D.	Assistant Director
A/N	Abovenamed
APPLIC.	Application or Applicant
Appn.	Application
AWO	Area Welfare Officer
B.C.	Birth Certificate
BFT	Benefit
BFY	Beneficiary
B & P	Benefits and Pensions
B.U.	Bring Up
C/A	Child of Age or Cheque Account
D.A.	District Agent or Disability Allowance
D.C.	Direct Credit
D.D.	Direct Deduction or Due Date
D.O.	District Office or Divisional Officer
D.O.B.	Date of Birth
D.P.	Data Processing
D.P.C.	Data Processing Centre
D.S.W.	Department of Social Welfare
Dup.	Duplicate
EDD.	Effective Due Date
E.O.	Executive Officer
F.B.	Family Benefit
F.O.P.	Forfeiture of Payment (Recovery by Offset)
F.S.	Family Support
F.U.	Follow Up
H.C.	Housing Corporation
H.O.	Head Office
I.B.	Invalids Benefit
L.S.P.A.D.	Lump Sum Payment After Death
M.C.	Marriage Certificate
M.R.	Master Record
N.S.	National Superannuation
O.P.	Overseas Pension or Overpayment
O/15	Child over 15 years
P.D.	Payday
P.F.	Putative Father or Per Fortnight
P.O.	Payment Order or Post Office
P.P.P.	Per Pay Period
Recip.	Reciprocal
RNL	Renewal
R.U.K.	Reciprocal United Kingdom
S.C.	Section Clerk or Certificate of Attendance at School
S.D.O.	Senior Divisional Officer
S.N.G.	Special Needs Grant
S.S.C.	Senior Section Clerk
S.S.W.	Senior Social Worker
S.W.	Social Worker
S.W.D.	Social Welfare Department
Vfd	Verified
W.B.	Widows Benefit
W.P.	War Pension



## IMPORTANT:

When communicating (by letter or verbally) with the Public or a beneficiary never use abbreviations.

They will be meaningless and will possibly create confusion.

# REFERENCES

(or where to find it)

YOU SHOULD FAMILIARISE YOURSELF  
WITH THE FOLLOWING:

NOTE:

The instructions below  
will most likely have the  
answer to some point you are  
not sure of.

LOOK UP THE ACT OR MANUAL  
ETC BEFORE YOU BOTHER OTHERS

1. SOCIAL SECURITY ACT 1964

Sections 21 - Widows Benefit  
61D - Lump Sum Payment on Death

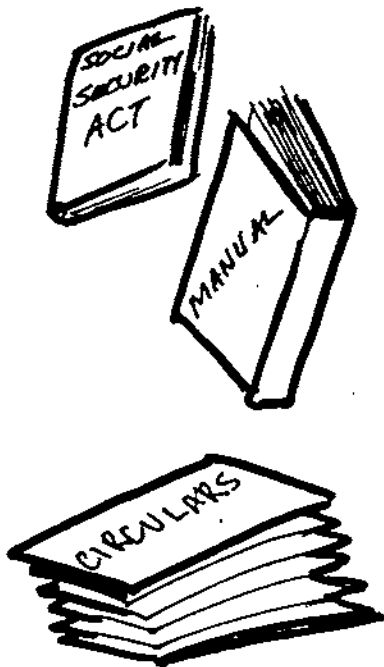
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2. MANUALS:

A. "WIDOWS"

Parts:

- A Widows Benefit - Qualification
- B Commencement of benefit
- C Application by widow on death  
of War Pensioner
- D Treatment of earnings
- E Reviews
- F Estates



REFERENCES (CONTINUED)

Manuals (Continued)

B. Reciprocity

Parts B and D - overseas applicants

C. Income and Property

Parts: A-D - Income assessment principles

F Deprivation of income

M Farm and business profits

O Overseas pensions

U Miscellaneous classes of income.

D. Social Security Data Processing

- Pay procedures

- Input form completion

E. Supplementary Services

Part A - Assistance for individuals under the Disabled Persons Community Welfare Act 1975

Part B - Special Needs Grant

Part C - Accommodation Benefit

Part E - Advance Payment of Benefits

Part I - Disability Allowance

Part J - Special Benefit

Part S - Miscellaneous Welfare Services/Concessions

Part W - Training Incentive Allowance for Domestic Purposes, Widows and Invalids Beneficiaries.

F. Miscellaneous Provisions

Part B - Lump sum payments after death

Part C - Grant a renewal of benefit after death of applicant

Part D - Mode of ascertaining annual Income for Benefit Purposes

Part P - Forfeit use of Benefit during detention in a Penal Institution.

Part Q - Effect of absence from NZ

Part T - Beneficiaries in Hospital

G. Pay Manual

Part Q Debts.

F "FOUR WEEKLY" Manual

O Verification of Births, Deaths and Marriages.

V Payment to agent or apportionment.

G Family Support Tax Credit Policy Manual.

SELF TEST QUESTION LOCATION

<u>PAGE</u>	<u>SUBJECT</u>
23	Qualifications, Public relations
41	Applications
67	Pregrant and grant action
84	Estate, B.O.D, A.C.C., Birth and marriage verification
107	Arriving from overseas, Input forms, Child supplement, Letter writing
144	Income, Earnings, Accom. benefit, Renewals, Special benefit
179	Child of age, Suspension/cancellation, Hospital Departure from N.Z., Transfer of files
197	Advance, Missing payments, Overpaid
210	Supp. Services
232	Miscellaneous

Did you have any problems in answering the self test questions.

If so - use the above index to recap.  
Before leaving this booklet  
ensure answers are understood,  
and read the last page.



You are here to provide a service

To do so helpfully and efficiently you must know all the instructions relating to your job.

GOOD LUCK.

FINALLY

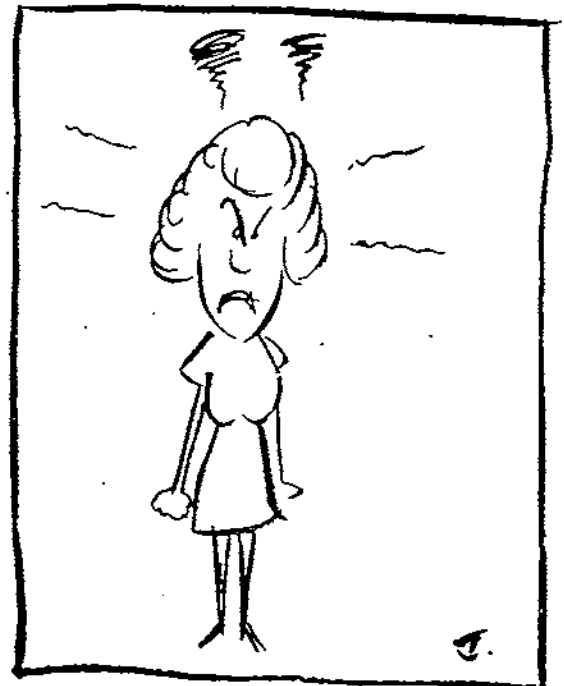
## DEALING WITH INQUIRIES

We know at times your job is demanding but if beneficiary or applicant makes an inquiry don't evade the issue by failing to provide an adequate answer.

Sure, in some instances it takes you time and effort to find out the true situation and perhaps rectify the matter. But this is what your job is all about.

### THINK

How would you like it, if on one pay day your pay did not arrive, and on making inquiries received some unintelligent and implausible answer that really meant - don't bother me now but it may turn up in a couple of weeks.



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