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ANSWERS
TO
QUESTIONS
RELATING TO
LOCAL RELIEF.

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STATE OF NEW JERSEY
FINANCIAL ASSISTANCE COMMISSION
STATE HOUSE, TRENTON, N. J.

PRINCETON SURVEYS

Jan 12 '40

ARTHUR MUDD
DIRECTOR

- FOREWORD -

This booklet has been prepared solely to aid in the solving of municipal relief problems and the methods and procedures suggested herein should not be considered as a part of the official FAC regulations which are issued from time to time by the State Director.

The questions answered are those asked from day to day, by municipal officials, regarding the general administration of relief and the preparation of relief office records.

Many municipalities have requested information relating to relief office records. In response to these inquiries, the attached sample forms have been selected as being representative of the type suitable for use under present relief conditions and, in addition, provide information for statistical and financial reports required by this Commission.

STATE FINANCIAL ASSISTANCE COMMISSION
Trenton, New Jersey
ARTHUR MUDD, Director.

ADMINISTRATION OF RELIEF, STATE OF NEW JERSEY

In the past five years it has become accepted practice to group under the heading of "relief" all forms of dependency and all persons in need of public assistance.

Properly defined, "relief" is a form of public assistance which is extended to needy persons not otherwise provided for by State law, and who are unable to meet their need, either in whole, or part, from income, pay received from part-time or occasional employment, the assistance of relatives, liquidation of bonds, bank accounts, building & loan shares, cash received from the adjustment of life insurance policies or other resources, and who, although willing to work, are unable to find employment or are unfit for work.

Q. WHAT IS THE AUTHORITY FOR SETTING UP A RELIEF ADMINISTRATION?

- A. Under the laws of the State of New Jersey, Chapter 83, Section 1, P.L., 1936, it is declared to be a public policy "that every needy person shall, while in the State of New Jersey, be entitled to receive such public assistance as may be necessary."

Q. WHO PROVIDES THE PUBLIC ASSISTANCE REQUIRED BY LAW?

- A. Section 6, Chapter 83, P.L. 1936 states, "Every municipality shall provide public assistance to persons eligible thereto residing in said municipality."

Q. WHO IS TO ADMINISTER THE ASSISTANCE PROVIDED BY THE MUNICIPALITY?

- A. Chapter 83, Section 6a, P.L., 1936 states, "Such assistance shall be administered by the overseer of the poor, or person, department or board administering the poor laws of the municipality."

Q. ARE ALL PERSONS IN NEED ELIGIBLE FOR SUCH ASSISTANCE?

- A. All needy persons not otherwise provided for under the laws of this State shall receive public assistance pursuant to the provisions of Chapter 83, P.L., 1936.

Q. HOW IS "NEED" OR ELIGIBILITY DETERMINED?

- A. By investigation, and the proper recording of family conditions, resources and basic needs.

Q. WHAT ASSISTANCE IS PROVIDED FOR BY LAW, OTHER THAN ASSISTANCE GRANTED UNDER CHAPTER 83?

A. State laws provide for:

- Dependent Children - Chapters 33, 43, 88 - P.L. 1936.
- Old Age Assistance - Chapter 31, P.L. 1936.
- The Blind - Chapter 30, P.L. 1936.
- The Crippled - Chapters 74, P.L. 1919 and 34,
P.L. 1928.
- Crippled Children - Chapters 188, P.L. 1926 and 70,
P.L. 1931.

In addition, the State, counties and municipalities provide public assistance in hospitals, homes, institutions, etc.

Q. HOW CAN THE OVERSEER DETERMINE WHICH AGENCY IS RESPONSIBLE FOR THE CARE OF THE CASE?

- A. This can only be done by establishing, at the time of application, complete records designed to include eligibility requirements for both local relief and public assistance from other sources.

Q. IS IT NECESSARY TO KEEP COMPLETE RECORDS?

- A. The success of any administration depends to a great extent upon the regularity with which the routine is carried on and the type of records kept. Poor records are not economy and failure to complete them, with the idea that incomplete records are a short cut, will make for duplication at a later date when it will be necessary to repeat the same questions during the time the case is under care.

Q. WHAT FORMS ARE CONSIDERED NECESSARY FOR EFFICIENT ADMINISTRATION OF RELIEF?

- A. The necessary or basic forms may be divided into two groups:

Group A. The forms required to record the information necessary to establish eligibility for relief.

Group B. The financial forms required to support the expenditures made in carrying the case on relief.

The following forms are attached to illustrate the answers to questions regarding records and are referred to, by number, throughout this pamphlet.

Group A - Case History Forms

#1-FAMILY RECORD - A family history prepared at time of application.

#2-FINANCIAL RECORD - ESTABLISHMENT OF ORIGINAL NEEDS - A record of family resources, prepared at time of application.

#3-FINANCIAL RECORD - ESTABLISHMENT OF CONTINUING NEEDS - A monthly record of family resources upon which the relief given during the month is based.

Group B - Basic Records Required In
Good Financial Practice

#4-CLIENT'S LEDGER SHEET - An individual case sheet upon which all relief grants (commitments) for the case are recorded.

#5-COMMITMENT RECORD - All orders issued are listed thereon by number, and as to kind and amount.

Q. HOW MANY EMPLOYEES WILL BE NECESSARY IF COMPLETE RECORDS ARE USED?

A. This will depend on the size of the case load and the area covered by the relief office.

Municipalities carrying case loads of 50 will obtain better results by the employment of one full-time worker. For case loads of less than 50, part-time service can be based upon the number of cases carried.

In municipalities carrying case loads of 50 to 100 it will be necessary to employ one full-time person and to provide a clerical assistant for at least four days per month.

In municipalities carrying case loads over 100, the specific needs of the municipality must be studied before the number required to administer relief can be set.

Q. IS IT NECESSARY TO SET UP A RELIEF OFFICE IN THE MUNICIPALITIES CARRYING SMALL CASE LOADS?

A. In order to carry on the administration of relief in an orderly, systematic manner and with economy of operation, it is desirable to set apart certain hours when the Overseer will receive the relief applicants. If possible, a room in a public building should be assigned as a relief office, and the office hours arranged so that persons will not have to stand in line when making application or when calling for relief orders.

In municipalities carrying case loads of 100 and under, office hours twice a week should be sufficient.

Q. WHAT STEPS ARE TAKEN BY THE OVERSEER WHEN A PERSON APPLIES FOR RELIEF?

- A. Each person applying for relief should be given an interview apart from other applicants waiting in the office.

In this first contact it is possible to determine if the applicant is the responsibility of the municipality. If the person applying is the responsibility of another agency, the Overseer should give him the name and address of such agency so that no delay will occur in his applying for the necessary assistance. (The Overseer should have on file the name, address and telephone number of all agencies in the area.)

Temporary relief should be given, if there is need, to persons awaiting transfer to a municipality or agency responsible for their care.

Q. IF THE PERSON APPLYING IS THE RESPONSIBILITY OF THE MUNICIPALITY, WHAT STEPS WILL BE TAKEN BY THE OVERSEER?

- A. If the person is applying for relief for the first time, it will be necessary for the Overseer to explain the conditions under which relief is given. The Overseer should make clear to him that under the law (Chapter 83, Section 7) he is obliged to ask certain questions in order to determine need for relief. This explanation will do much to correct the impression that such questioning is "red tape" of the relief agency. The applicant should be informed that all information is confidential and will be so treated by the relief agency.

After this explanation, the Overseer should take the name, address and other identifying information on the FAMILY RECORD (#1). If this is done in a co-operative manner there will be no need for embarrassment on the part of the applicant and he will see little difference in this procedure and that followed when he contacts a business office to ask for credit extension.

Q. IS THE FAMILY RECORD (#1) COMPLETED DURING THE OFFICE INTERVIEW?

- A. It is more satisfactory to complete this form in the home where both husband and wife may be interviewed. The applicant should be told to return home and await the call of the Overseer at a stated time. He should be told to have all employable members of the family at home when the Overseer calls, unless they are at work or school, also to have all life insurance books and policies, lodge and union books, bank books, deeds of property, etc. ready at that time. Rent receipts and public utility bills will serve as documentary proof as to the length of residence at given address.

Q. WHAT IS NECESSARY AT THE TIME OF THE HOME VISIT?

- A. The interview in the home should take place within 24 hours after the application at the relief office.

The interview should not be hurried and it is important that the person applying for relief understands the procedure necessary to establish his need for relief. He should be told that it is necessary to contact the employers, relatives and other persons given as reference in order to make certain there are no resources available which have not been made use of, and that in making such check on his statements, his honesty is not in question.

Q. WHY IS IT NECESSARY TO ASK THESE QUESTIONS IN ORDER TO GRANT RELIEF?

- A. It is sometimes possible in talking to the family to show the persons in the case how to use, to better advantage, the funds which they have available.

It is therefore necessary, before relief is granted, to have a FINANCIAL RECORD (#2) of all available funds, as relief cannot be given if there are other means of meeting the need. The family should be told that life insurance policies are equivalent to savings and should be submitted for adjustment before a relief grant is made. This explanation will prevent any misunderstanding or refusal to accept the decision of the Life Insurance Adjustment Bureau.

Q. WHY IS IT NECESSARY FOR THE APPLICANT TO SIGN THE FINANCIAL RECORD (#2)?

- A. In order to place some responsibility on the applicant for establishing his need for relief. This is good business practice and no person should hesitate to sign a statement if it is made to his best knowledge and belief. Note: If there is no income, write "NONE" so that the person is aware of what he is signing.

It is necessary for the Overseer to make clear to the applicant the reason for requiring the signature and the penalty under the law (Chapter 83, Section 19, Laws of 1936) for making and signing false statements. Make certain that the head of the case signs the form with full knowledge of what he or she is signing. If the person cannot read, it will be necessary for the Overseer to make such notation on the form and to state that the form was read to the applicant before signing with a cross (X). The Overseer should act as witness.

Q. IS IT NECESSARY TO VERIFY THE STATEMENTS OF APPLICANTS?

- A. When the FAMILY RECORD (#1) and FINANCIAL RECORD (#2) are completed the Overseer should check first with other agencies to which the family is known, as shown by the forms. The information obtained in this contact may be helpful to the Overseer in deciding on a plan for the family.

Contacts should then be made with relatives, and employers who have been given as references, in order to check on the information given by the applicant. These contacts are very important.

Q. SHOULD STATEMENTS OF RELATIVES, FRIENDS, AND NEIGHBORS BE ACCEPTED AS FACTS?

- A. In contacting relatives and friends, the Overseer should sift the facts when the opinion appears to be prejudiced. It should be remembered that assistance is given on the basis of need and that an individual's estimate of character does not alter the need.

Q. WHAT SHOULD BE DONE TO OBTAIN WORK BEFORE GRANTING RELIEF?

- A. The applicant for relief, and all employable members of the family, should register with the State Employment Bureau and at the Municipal work bureau.

The Overseer should contact the former employer in order to determine the last earnings of the person who has been employed and also to learn if there is a possibility of such employer re-hiring the person about whom the inquiry is made.

The Overseer should also make every effort to assist the recipient to obtain employment so that he may return to his normal method of living and the recipient should submit evidence of his efforts to obtain work.

Q. IS IT POSSIBLE TO GIVE TEMPORARY RELIEF PENDING THE INVESTIGATION OF THE APPLICANT'S STATEMENT?

- A. When a FAMILY RECORD (#1) and FINANCIAL RECORD (#2) are completed, the Overseer is in a position to know if temporary relief is required. If such need exists, the applicant should be given a relief order to carry him until the investigation is completed.

Q. AFTER STATEMENTS ARE VERIFIED & ELIGIBILITY ESTABLISHED, HOW ARE THE CASES CLASSIFIED?

- A. The cases should be classified as follows:

"E" - Employable case - containing one or more employable persons.
"U" - Unemployable case - containing no employable persons.

In addition, either of these types may carry an additional classification of "T" which covers cases which are the responsibility of another agency and are carried temporarily until transfer to such agency.

(An employable person is defined as one who is over 16 and under 65 years of age, physically and mentally fit to work and not needed at home.)

- Q. SHOULD THE CASES CLASSIFIED AS "TRANSFER" BE CARRIED BY THE OVERSEER?

- A. When it is established that the case is the responsibility of another agency, the Overseer should require that the person in such case make application to the other agency for benefit.

In such cases, if the person is in need of relief, the Overseer should give such temporary relief as is necessary pending transfer to the other agency.

These cases should be followed up each month by the Overseer to make certain there is no delay in the transfer to the agency responsible for their care.

- Q. WHAT ACTION SHOULD BE TAKEN BY THE OVERSEER IF THE PERSON ELIGIBLE FOR STATE OR OTHER AID REFUSES SUCH ASSISTANCE?

- A. Care should be taken to learn if the person understands the requirements for other aid. If he refuses to apply after an explanation is made, he may be dropped from the relief roll, as a municipal relief office is not legally obliged to carry (except temporarily) a case which is eligible for other assistance provided by State law.

- Q. WHEN THE RECORDS INDICATE THAT THE APPLICANT IS ELIGIBLE FOR RELIEF, HOW IS AMOUNT OF RELIEF DETERMINED?

- A. Before the amount of relief is determined, it is first necessary to list on the FINANCIAL RECORD (#2), the basic needs of the persons in the case. The established method of deciding the amount of relief is to itemize the necessities, such as food, shelter, milk, fuel, etc. This establishes the BUDGET for a given period.

Note: When necessary, include cost of transportation, lunch, clothing, etc., in budgets for cases containing employed persons.

Q. HOW LONG A PERIOD DOES THE BUDGET COVER?

A. As the customary procedure is to review the case once a month, in order to establish the need for continued assistance, it is recommended that the BUDGET be estimated on a monthly basis.

Q. AFTER THE BUDGET IS SET UP, WHAT IS THE NEXT STEP?

A. The total income, including free rent, free fuel or other indirect income, should be shown on FINANCIAL RECORD (#2), in the column set up for the purpose. When this is done, the income in the case is deducted from the BUDGET and the balance is the BUDGET DEFICIT.

Q. WHAT IS A "BUDGET DEFICIT"?

A. A BUDGET DEFICIT is the part of the BUDGET which the family is unable to provide for itself. Example: If the BUDGET is \$30.00 and the income is \$10.00, the BUDGET DEFICIT is \$20.00 and this is the maximum amount of relief which may be granted.

Q. DOES THE RELIEF RECIPIENT KNOW THE AMOUNT OF THE BUDGET SET UP BY THE OVERSEER?

A. It is advisable to discuss the budget with the family, as it is important that they understand the basis on which relief is given them, and it should be made clear that they cannot receive relief in excess of the BUDGET DEFICIT.

Q. IS HEALTH SERVICE COST ESTIMATED IN THE BUDGET?

A. Health service, such as doctor, dentist, nurse or hospital care, is a variable need and cannot be estimated. It is not included in the BUDGET. When such need arises, relief should be authorized to cover this service, but this amount is NOT DEDUCTED from the BUDGET set up for the family.

Q. ARE FEDERAL SURPLUS COMMODITIES INCLUDED IN THE BUDGET?

A. No deduction in the BUDGET should be made to cover the cost of these commodities as they are given by the Federal Government in addition to the relief granted by the municipality.

Q. HOW OFTEN SHOULD RELIEF ORDERS BE GIVEN TO MEET THE BUDGET DEFICIT?

A. Relief orders may be issued monthly, semi-monthly or weekly. Experience has shown that for economy of operation and satisfaction to the client the most satisfactory method of issuing orders is as follows:

Food - Semi-monthly
Milk - Semi-monthly or monthly (due on same day as
food order).
Shelter - Monthly.
Fuel - Monthly or semi-monthly (or to meet need).
Gas & Electric - Monthly
Clothing - To meet the need.
Household needs & incidentals - to meet the need.

Q. HOW ARE RELIEF ORDERS DISTRIBUTED?

- A. This will depend upon case load, area covered and size of relief office force. Orders may be delivered to recipients at their homes or, preferably, at distribution points on the day the order is due. If the latter method is followed, recipients should be told to come at different hours so that there will be no congestion. Whenever practical, the head of the family should be required to call for the order. If this is impossible, the Overseer should arrange for another adult member of the case to receive it.

Q. IS IT NECESSARY TO KEEP COPIES OF RELIEF ORDERS?

- A. YES. It is necessary for the relief office to keep a carbon copy of each order issued, as these are used to make the financial records.

Q. IS IT NECESSARY TO PROVIDE THE RELIEF RECIPIENT WITH COPIES OF ORDERS?

- A. NO. However, in order to protect himself, the recipient may obtain a receipt from his landlord when rent is paid by relief order.

Q. CAN RELIEF BE GRANTED TO PERSONS WHO ARE EMPLOYED OR HAVE INCOME FROM OTHER SOURCES WHICH IS NOT SUFFICIENT TO MEET THEIR NEEDS?

- A. The Laws of 1936, Chapter 83, Section 18, specifically state that income received from part-time or casual employment or other sources, by the head of the family or dependents "shall not operate to remove such person entirely from the relief roll". However, the amount of relief and income cannot exceed the amount which would be received if the case were wholly dependent on relief.

It should be the practice of the relief agency to grant relief to supplement income, in order to encourage persons on relief to seek and accept part-time and occasional employment.

Refusal to grant relief, because of income received from such employment, will result in the failure of the relief recipient to accept part-time employment for fear that he will be removed from the relief rolls.

Q. IS IT NECESSARY TO VISIT THE CASE AFTER ELIGIBILITY IS ESTABLISHED AND RELIEF IS GRANTED?

- A. It is required under Chapter 83, Section 10 (a), P.L. 1936, that the Overseer of the Poor shall "Supervise by periodic visitation every person receiving assistance".

It is the accepted practice to visit the cases on relief once a month to establish their need for continued relief.

Q. HOW IS THIS CONTINUED NEED ESTABLISHED?

- A. A FINANCIAL RECORD (#3) should be filled out at the time of the re-visit and the client should sign the statement in the same manner as he did Form #2 when he applied for relief.

All details outlined on the form should be completed. A signed statement is required, but the signature of a minor should not be accepted.

Q. WHAT ADJUSTMENT IS MADE IN THE RELIEF GRANT, IF ON THE RE-VISIT THE OVERSEER FINDS THE INCOME INCREASED?

- A. Should the income received in the case be increased during the latter part of the period covered by the BUDGET, such income should be deducted from the amount of relief given in the following month.

Q. WHEN IS A CASE CLOSED?

- A. When the income received in the case meets the BUDGET, the case is closed, but relief should be given until the income is actually received.

Q. HOW ARE CASE RECORDS FILED?

- A. As the history of the family is confidential, the records should be filed in a manila folder, which can be purchased for about one cent apiece. These folders (one for each case) are filed alphabetically.

Q. ARE THERE OTHER RECORDS REQUIRED IN THE ADMINISTRATION OF RELIEF?

- A. YES, the financial records referred to on Pages 2 and 3.

Q. HOW ARE THESE RECORDS PREPARED?

- A. The copies of the relief orders contain the information for the preparation of these records.

When a case is accepted for care, a ledger sheet (#4) should be prepared from the information on Forms #1 & #2. Ledger sheets should be filed in cardboard covers, and arranged, alphabetically, under the name of the head of the family.

Q. WHEN ARE THE ENTRIES MADE IN THE LEDGER?

- A. Entries should be made in the ledger as soon as possible after the issuing of the orders. If this is done regularly, more accurate results will be obtained. Entries are made from the copies of the orders or from entries on a Commitment Record (#5).

Q. WHEN ARE THE ENTRIES MADE ON A COMMITMENT RECORD (#5)?

- A. As soon as the relief order is issued, the information should be recorded in numerical sequence, from the copy of the order, on form #5.

When the copies of the orders have been recorded in the clients' ledger (Form #4) and on Form #5, they should be filed away in consecutive order between two cardboards marked on the outside to show the number of orders contained therein: FROM ___ TO ___ and the date.

Q. WHAT PROOF IS THERE AS TO THE ACCURACY OF THE RECORDS MADE ON CLIENTS' LEDGER (#4) AND COMMITMENT LEDGER (#5)?

- A. In order to follow correct financial practice, all records should balance. As Form #5 records the information by kind, and Form #4 records the same information under the client's name, the total of #4 should balance with the total of #5.

Q. HOW ARE RELIEF ORDERS HANDLED WHEN RETURNED BY THE VENDOR FOR PAYMENT?

- A. The original order should be verified with the entry on the COMMITMENT RECORD (#5) and the date the bill was passed for payment noted on the record.

As State reimbursement cannot be received until bills are paid, it is important that the Overseer check and pass these bills as soon as received.

If relief orders are outstanding, the Overseer should remind vendors to present their bills more promptly.

The passing of the bills presented by the vendor for payment completes the routine in the handling of the relief case.

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