

File Thompson

June 25, 1957

Honorable Edward J. Patten
Secretary of State
State House
Trenton, New Jersey

Dear Secretary Patten:

Enclosed herewith for filing is the following regulation of the
Bureau of Assistance of the Division of Welfare of this Department.

SUPPLEMENT NO. 3 TO RULING NO. 21
Regulations Governing Matchability of Expenditures for
Services to Applicants and Recipients.

Very truly yours,

DEPARTMENT OF INSTITUTIONS AND AGENCIES

John W. Tramburg
John W. Tramburg, Commissioner

JWT:4

CC - Brendan T. Bryne, Secretary to the Governor ✓
Mr. Elmer V. Andrews, Director, Division of Welfare
Mrs. Elizabeth Feehan, Assistant to the Commissioner

State of New Jersey
Department of Institutions and Agencies
Division of Welfare

BUREAU OF ASSISTANCE

REGULATION # REG. #21
Supplement No. 3

ISSUED: 7/1/57
(Date)

REV.: _____
(Date)

TITLE: Regulations Governing Matchability of Expenditures

SUBJECT: for Services to Applicants and Recipients

STATUTORY REFERENCE: R.S. 14:7-27

Eugenia, Chief
Bureau of Assistance

Approved:

By: *John H. Trumburg*



State of New Jersey
DEPARTMENT OF INSTITUTIONS AND AGENCIES
TRENTON 25

BUREAU OF ASSISTANCE
148 WEST STATE STREET

July 1, 1957

TO: COUNTY WELFARE BOARDS

RE: Supplement No. 3 to Ruling No. 21 -
Regulations Governing Matchability of
Expenditures for Services to Applicants and Recipients

You will recall that several years ago we prepared draft material on the above. We have now obtained clearance on this material and it has become important to issue it in relation to administrative matching for services authorized under the 1956 amendments to the Social Security Act.

You will wish to review this regulation carefully, analyze the services you are now providing, and determine for which of those services costs should be met routinely from the administrative account.

Any specific questions you may have should be referred to the Bureau by correspondence or telephone.

Very truly yours

DEPARTMENT OF INSTITUTIONS AND AGENCIES

Irving Engelman
Irving Engelman, Chief
Bureau of Assistance

IE/ICRd

Approved
Elmer V. Andrews, Director
Division of Welfare

State of New Jersey
Department of Institutions and Agencies
Division of Welfare-Bureau of Assistance

7/1/57

SUPPLEMENT NO. 3 TO RULING NO. 21

REGULATIONS GOVERNING MATCHABILITY OF EXPENDITURES
FOR SERVICES TO APPLICANTS AND RECIPIENTS

1. The costs of providing certain services to applicants and recipients of public assistance are recognized under Federal policy as costs of public assistance administration, as distinguished from costs of assistance payments to or on behalf of the eligible individuals. Costs of administration are subject to Federal participation pursuant to a different formula, and on a basis which is separate from and in addition to the Federal participation otherwise available with respect to assistance payments. It is therefore important that the county welfare boards shall classify and identify as administrative expenditures all costs of services to applicants and recipients which fall within the definitions hereafter stated.
2. Some of the items which are permitted, under this rule, to be treated as administrative expenditures, are also authorized by the Budget Manual as special circumstance items which may be recognized in the assistance payment. These regulations do not prohibit the inclusion of such items in the assistance payment, wherever such inclusion, under the circumstances of the case, is necessary. However, the handling of such items as administrative expenditures, with payment from administrative funds, is to be preferred, and shall be so processed and accounted for whenever practical.
3. In general, costs shall be reported and claimed as administrative expenditures, subject to Federal participation, if they are incurred to provide services (to both applicants and recipients) that concern the welfare of the individual and assure to him the maximum benefit from the assistance payment, in relation to personal, family and community resources.
4. Costs of the character generally described in "3", above, shall be reported and claimed as administrative expenditures, subject to Federal participation, if they are incurred during the period of pending and continuing eligibility of the individual, or during a reasonable period (not more than 3 months) after the termination of the assistance payment.
5. Costs of the character generally described in "3", above, and within the time limitations generally described in "4", above, shall be reported and claimed as administrative expenditures, subject to Federal participation, only if the services are furnished to the individual at the direction of, or with the authorization and approval (express or implied) of the agency, and if the disbursements are supported by an invoice or other form of claim for payment presented to the agency by the vendor of the service.
6. The general definitions stated above include, but are not necessarily limited to, the following types of costs incurred for services to applicants and recipients:
 - a. Costs of information, analysis, investigation, consultation, planning and referral, including the cost of transportation and other expenses necessary to enable the applicant or recipient to receive services in respect

to legal, medical and social problems (but excluding the cost of legal, medical, educational, rehabilitative and remedial services that go beyond consultation, diagnosis and planning);

EXAMPLES: Fees charged by Federal or State agencies for searches of census, birth, marriage records, etc.;

Fees or costs incurred in securing information from court records such as official copies of decrees, adoption and divorce records, etc.;

Costs of registration and clearance with a social service exchange;

Cost of ambulance, taxi, or other conveyance, if hired by the agency to transport the client to and from hospitals, clinics, physician's offices, certified or approved institutions, lawyer's office, bank or similar institution, other public or private social agencies, etc.;

Cost of securing appraisals or evaluations of real or personal property, when required in relation to establishing the eligibility of an applicant, or to the disposition of property or assets during a recipient's lifetime (but excluding such costs in connection with settlement of the estate of a deceased recipient);

Costs of securing services of interpreters or translators for non-English speaking applicants or recipients.

b. Costs of mental and physical examinations and other diagnostic services necessary to determine the mental or physical condition of the applicant or recipient or of a member of the household affecting his health and well-being, including expenses necessary to secure the service (but excluding the costs of medical treatment);

EXAMPLES: Cost of examinations by physicians and specialists when obtained for diagnostic purposes in relation to determination or redetermination of eligibility for Disability Assistance, or to secure diagnostic evaluation as a basis for recommendations for medical treatment for applicants or recipients of either Disability or Old Age Assistance;

Charges for transcripts or summaries of hospital or clinic records;

Costs of maintenance, examination and laboratory fees for clients admitted to general hospitals or to rehabilitative centers for "diagnostic work-up" (but not if admitted for treatment);

Cost of x-ray, laboratory tests, etc., in relation to diagnosis (but not for therapy);

Costs of examination and related proceedings necessary to determine a client's eligibility for commitment or admission to a mental institution.

c. Costs of services, including consultation and arrangements for counsel, necessary in the adjustment of legal problems of the applicant or recipient of public assistance, including official fees, the costs of documents and other expenses necessary to secure the service (but excluding attorneys' fees and the costs of judicial proceedings except as provided in "d");

EXAMPLES: Fee for consultation with attorney regarding advisable course of action by or on behalf of an applicant or recipient (but not including fees for any attorney's services beyond consultation);

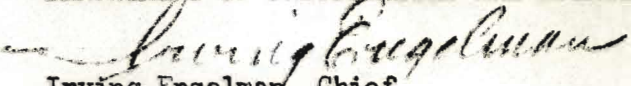
Official fees and costs required for the filing, recording, transcribing, etc., of legal documents necessary to the adjustment of legal problems of the applicant or recipient;

Cost of renewal of bond for legal guardian.

d. Costs of guardianship proceedings for applicants or recipients of public assistance;

EXAMPLES: All costs in connection with initial or substituted guardianship proceedings including attorney's fees, court costs, preparation and filing of documents, payment of medical witnesses for examination of client and testimony in court, transportation for client and proposed guardian, cost of guardian's bond, etc.

DEPARTMENT OF INSTITUTIONS AND AGENCIES


Irving Engelman, Chief
Bureau of Assistance

IE/MCRd

Approved
Elmer V. Andrews, Director
Division of Welfare

Ruling Series.
Supplement No. 3 to Ruling No. 21

Insert in Handbook under section
"Rulings and Bulletins."

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RECEIVED
STATE OF NEW JERSEY
JUN 27 3 10 PM '57
OFFICE OF
CHIEF EXECUTIVE