

Thompson

January 24, 1957

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

Dear Secretary Patten:

Enclosed herewith for filing are the following regulations of the
Bureau of Assistance of the Division of Welfare of this Department:

RULING NO. 27
Old Age, Survivors, and Disability Insurance

RULING NO. 27 - Supplement No. 1
Special Study of Assistance Cases Eligible for OASDI Benefits
As a Result of 1956 Amendments

Very truly yours

DEPARTMENT OF INSTITUTIONS AND AGENCIES

John W. Tramburg
John W. Tramburg, Commissioner

JWT:4

CC: Brendan T. Byrne, Secretary to the Governor ✓
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

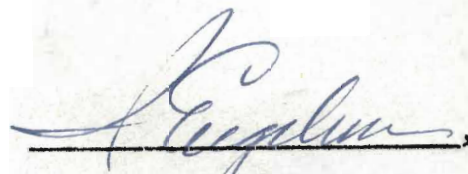
REGULATION # ~~RULING NO. 27~~ISSUED: 2/1/57
(Date)REV.: _____
(Date)

TITLE: _____

SUBJECT: Old Age, Survivors, and Disability InsuranceSTATUTORY REFERENCE: 44:7-6, 7-12

Note: Previous Ruling No. 27 had been cancelled and had not been on file with the Secretary of State. This, therefore, is a completely new Ruling and not a revision.

Please note also that this Ruling does incorporate the previous Supplement No. 2 to Ruling No. 27, issued 4/12/55, and on file with the Secretary of State. Supplement No. 2 is hereby officially cancelled.

 , Chief
Bureau of Assistance

Approved:

By: John W. Trumburg



State of New Jersey
DEPARTMENT OF INSTITUTIONS AND AGENCIES
TRENTON 25

BUREAU OF ASSISTANCE
148 WEST STATE STREET

February 1, 1957

TO: COUNTY WELFARE BOARDS

RE: Ruling No. 27, Old Age, Survivors, and Disability Insurance;
Attachments No. 1, 2, and 3;
Supplement No. 1 to Ruling No. 27, Special Study of Assistance
Cases Eligible for OASDI Benefits As a Result of 1956 Amendments;
Attachment No. 1

Attached is one copy each of the above regulations. Additional copies for staff are being forwarded under separate cover.

This is a completely new Ruling No. 27, the previous issue having been officially cancelled August 10, 1956.

The primary purpose of the new ruling is to provide information and instructions regarding the Social Security Act (as revised by the 1956 amendments) in relation to assistance clients and their families. The opportunity has also been used to incorporate into one statement and to bring up to date all previous instructions regarding benefits, "disability freeze," lump-sum death payments, and OASDI payments to institutional patients.

Please note the change in title. Hereafter the program will be known as Old Age, Survivors, and Disability Insurance (OASDI).

The new Supplement No. 1 to Ruling No. 27 requires immediate administrative attention. It is recommended that all staff concerned first review carefully the new Ruling No. 27, particularly sections A through E, to become familiar with the 1956 provisions of the Act. Immediate attention should then be directed to the Supplement, and procedures established for carrying out the instructions therein.

There will need to be constant alertness on the part of staff in processing new applications and reviewing active cases for possible eligibility of clients and their families for OASDI benefits under the expanded provisions.

To County Welfare Boards
Re Ruling No. 27; Attachments No. 1, 2, and 3; and Supplement No. 1
to Ruling No. 27; Attachment No. 1 2/1/57

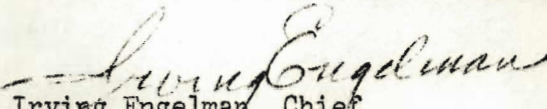
The following regulations are to be destroyed:

Supplement No. 1 to Ruling No. 27, Assistance Recipients Newly
Eligible for OASI Benefits, 12/9/54;
Supplement No. 2 to Ruling No. 27, Clearance with OASI to Determine
Eligibility for "Disability Freeze" of Clients of County Welfare
Boards, 4/12/55;
Bulletin No. 31, Old Age and Survivors Insurance, 12/7/45;
Supplement to Bulletin No. 31, Reimbursement of Burial Expenses
Through Old Age and Survivors Insurance, 4/15/47;
Supplement No. 2 to Bulletin No. 31, Old Age and Survivors Insurance
Payments for Institutional Patients, 5/5/47.

If you have questions about the Ruling or the Supplement please consult
your Field Representative or this office.

Very truly yours

DEPARTMENT OF INSTITUTIONS AND AGENCIES


Irving Engelman, Chief
Bureau of Assistance

IE/MCRd

Approved
Elmer V. Andrews, Director
Division of Welfare

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

1/21/57

RULING NO. 27
OLD AGE, SURVIVORS, AND DISABILITY INSURANCE

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Attachments

- No. 1 Sample Form ODA-20, revised 1/57
- No. 2 Sample Federal Form for "Disability Freeze" Clearance
- No. 3 Directory of District Offices of Social Security Administration, 1/57

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

1/21/57

RULING NO. 27

OLD AGE, SURVIVORS, AND DISABILITY INSURANCE

A. GENERAL STATEMENT

The Bureau of Old Age, Survivors, and Disability Insurance of the Social Security Administration administers the Federal program of benefit payments to elderly insured wage earners and to self-employed persons who have retired, to certain of their dependents, and to the surviving dependents of deceased insured wage earners and self-employed persons. Under the 1956 amendments to the law, totally and permanently disabled workers between the ages of 50 and 65 will also become eligible for benefits, as will mentally or physically disabled children who become disabled before age 18 and who are children of deceased insured workers or of living retired workers entitled to benefits.

There have been other important changes in the law and new groups of workers brought under coverage. In practical effect, substantially all workers and self-employed persons, now including military service men, are hereafter protected by social security coverage. Likewise, under the Railroad Retirement Act, railroad employment is jointly covered by the two programs, and provisions outlining the interrelationships have been established. The only groups remaining uncovered are principally doctors of medicine, and certain agricultural and domestic workers whose earnings are too small or too irregular to be effectively accounted for.

Helpful information may be obtained from a series of pamphlets, copies of which may be secured from any district office of the Social Security Administration.

B. PERSONS ENTITLED TO BENEFITS

Those who may receive benefits are:

1. Retired insured wage earner or self-employed person, aged 65 or over for men, and age 62 or over for women as of 11/1/56. (Women retiring before age 65 must have at least 1 1/2 years in covered employment, and will have a lifetime reduction in their benefit on a sliding scale according to point of application between 62 and 65 years.)
2. Totally and permanently disabled insured workers age 50 through 64 (applicant must have worked in covered employment 5 years in 10 years before the established beginning date of disability and 1 1/2 years in 3 years before that, and have been disabled at least 6 months and with the disability expected to continue indefinitely.) Benefits are not provided for dependents of disabled workers.

Note: Disability Benefits are not to be confused with the "Disability Freeze" provision (see F, 2, below). It is also different, of course, from the public assistance program for permanently and totally disabled persons, known in New Jersey as Disability Assistance. This new provision in effect extends OASDI benefits to persons between 50 and 65 who become permanently and totally disabled for further work prior to age 65 and retirement.

3. The wife of a retired insured worker if she is age 62 or over. (Wives claiming benefits between age 62 and 65 will have a lifetime reduction of benefits as above.)

4. The husband of a retired woman worker entitled to benefits, provided he is 65 or older and was dependent upon his wife at the time she became eligible for benefits.

5. The widow aged 62 or over, or dependent widower age 65 or over, of a deceased insured worker. (Widows claiming benefits between age 62 and 65 will receive the full amount of benefits regardless of age.)

6. Children

a. Dependent children under age 18 of either a retired or deceased insured worker;

b. Dependent children age 18 or over of a retired or deceased insured worker if they became, or become permanently and totally disabled before reaching age 18.

7. The mother of eligible children of a deceased insured worker (the worker's widow, or in some cases his divorced wife) regardless of her age if the eligible child or children are in her care. This includes the mother of a disabled child 18 or over as referred to in 6, b, above.

8. The parents (mother age 62 or over and father age 65 or over) of a deceased insured worker, who were dependent on the worker at the time of his death, provided there is no surviving widow, widower, or child who would be eligible for benefits.

9. Some women aged 65 and over, with at least 1 1/2 years of covered employment, who were ineligible under the old law, but eligible under the new provisions; dependent husbands of such women, if 65 years of age or over; certain other dependents of such women.

10. Surviving dependents of some women who died after June 30, 1954, and who were 62 through 64 years of age at time of death.

C. EFFECTIVE DATES OF 1956 PROVISIONS

Under the new provisions of the Act the benefits for women between the ages of 62 and 65 are first payable for November 1956; the benefits for disabled children age 18 or over are first payable for January 1957; and disability benefits to persons between 50 and 65 are first payable for July 1957.

D. SUSPENSION OF BENEFITS

The law provides that a beneficiary, whether a wage earner or self-employed, may earn as much as \$1200 a year without any suspension of benefits, but should earnings exceed \$1200 per year, some benefits will be withdrawn in proportion to the excess earnings; and earnings from any type of work whether or not covered by Social Security are counted for this purpose. All beneficiaries age 72 or over may draw benefits regardless of the amount of their current earnings.

E. ELIGIBILITY FOR PUBLIC ASSISTANCE OF WOMEN 62 OR OVER ENTITLED TO BENEFITS

A woman age 62 or over who is receiving or applying for assistance who appears to have potential eligibility for Social Security benefits, shall be expected to apply for such benefits in the same manner as any other potentially eligible person.

The Federal Bureau of Assistance, Department of Health, Education and Welfare, has specifically made the following interpretation. The fact that it is optional for certain women under age 65 to establish OASDI entitlement at reduced rates does not provide a basis for an interpretation that their eligibility for such reduced benefits may be disregarded in determining their available resources. It may be observed that it is equally optional for a woman, or a man, at age 65 or over to decide whether or not to apply for benefits. However, a person does not have a right to have his needs met by a public assistance program because of his preference to decline some other cash resource that is lawfully available to him upon application.

The "reduced" benefit rate payable to a woman between 62 and 65 has an actuarial relationship to her life expectancy at the time benefits begin, so that, on the average, persons are not disadvantaged by electing the earlier start.

F. PROCEDURES FOR FILING CLAIMS; CLEARANCE OF BENEFIT STATUS

Whenever it appears that an applicant for or recipient of assistance may be eligible for OASDI benefits, and has not already filed a claim, he shall be instructed to do so by calling at the district office of the Social Security Administration serving that area. [See Directory of District Offices, Attachment No. 3]

1. Claims for and Clearance of Benefit Status

a. If a claim has previously been filed the client should be able to show to the public assistance agency his award or disallowance letter for verification of his OASDI status and amount of benefits if eligible. If he has no letter, or the agency has reason to believe that the one he does have is not current, three copies of Form ODA-20 will be completed. Two copies will be mailed to the appropriate district OASDI office, and the third copy retained awaiting the report.

b. If no claim has been filed and the agency is instructing the client to file his claim, three copies of Form ODA-20 will be completed and two copies given to the individual to take to the district OASDI office. If he files a claim, the district office will notify the agency and later inform it as to final action. If no claim is filed because the person is obviously not entitled to benefits, or the person does not wish to file, both copies of ODA-20 will be returned to the agency with an appropriate explanation.

Upon receipt of a report from OASDI, the agency shall make appropriate notations in its records, and account in the client's budget for the amount of any benefits when they become available.

c. A sample Form ODA-20 (revised 7/56) is Attachment No. 1 to this ruling. Welfare Boards are requested to prepare this form for their own use.

2. Clearance with OASDI to Determine Eligibility for "Disability Freeze" of Assistance Clients

a. The 1954 Amendment

The 1954 amendments to the Act included provisions referred to as the "disability freeze." These provisions permitted benefit increases for some current OASDI beneficiaries who had become disabled before reaching age 65; and they protect the future benefit rights of disabled workers under 65 who have had at least 5 years of work in covered employment, and the benefit rights of their survivors. These provisions became effective July 1, 1955.

b. Special Clearance Plan

In order to give prompt service to agencies who are in direct touch with identifiable groups of disabled persons, the Bureau of Old Age, Survivors, and Disability Insurance gives priority clearance to cases referred by such agencies.

The clearance consists of two steps as follows:

1) All clients referred will have their wage records checked against the central files in Baltimore. For this purpose the welfare board prepares one copy of the special Federal Referral Form (see Attachment No. 2, supplies of which are obtained from the nearest district office of OASDI) and sends to the district office, together with three copies of Form ODA-20.

2) If the wage record clearance shows the client has the required 5 years in covered employment, the OASDI district office is notified, and it in turn notifies the client, informs him of the "disability freeze" provisions, and assists him in filing an application for a disability determination. The welfare board has no responsibility at this point, nor for the disability determination.

3) If the client is determined to be eligible for the "disability freeze," the OASDI district office notifies the client and informs the welfare board by returning one copy of the ODA-20.

Determination of eligibility for any person already receiving OASDI benefits generally results in an increase in his OASDI benefits.

4) Clients whose wage records do not entitle them to apply for disability determination are not notified by OASDI, but form ODA-20 is returned with this information to the welfare board.

5) Clients who fail to apply for "disability freeze" determination following initial notice from OASDI, receive one follow-up notice. If and when the welfare board is informed by OASDI of failure of the client to apply, the caseworker shall get in touch with the client, ascertain the reason for his failure, interpret the provisions and possible benefits, and assist him, if necessary, in filing his application. The client shall be informed that refusal to apply for the "disability freeze" renders him ineligible for assistance.

c. Potentially Eligible Groups

Four identifiable groups of categorical assistance clients (whether recipients or applicants) are potentially eligible for the "disability freeze."

- 1) OAA and AB clients who are also OASDI beneficiaries and who were disabled at least six months prior to reaching age 65, if they had 5 years in covered employment during the 10 years preceding disablement.
- 2) DA clients who have had at least 5 years covered employment after 1936.
- 3) AB clients with a similar work history.
- 4) Disabled parents in HIA cases who also had such employment.

d. Clients To Be Referred

In view of the difficulties of determining initially whether or not OAA, AB, and DA clients have the prerequisite wage record, and the fact that all doubts about referral are to be resolved in favor of the client, the welfare board shall refer all clients except those who are definitely known to have no record of covered employment since 1936, and those whose "disability freeze" status has been previously determined.

e. Other Referrals

Staffs of county welfare boards should also be alert to the possible eligibility of all members of client's household, regardless of whether or not such persons are currently receiving any form of public assistance. However, the State Board of Child Welfare will refer disabled fathers (not receiving OAA, AB, DA or GA) and other disabled persons in HIA cases. Municipal welfare departments are being instructed to refer disabled persons receiving general assistance unless an application for categorical assistance has been filed. Accordingly, disabled persons who are not being referred by an assistance agency other than the welfare board should be instructed how to apply at the OASDI district office, or a referral form may be sent for them by the welfare board. However, in these situations do not send form ODA-20, unless the person being referred is currently receiving or believed to be currently eligible to receive monthly OASDI benefits.

f. Relationship of "Disability Freeze" to Disability Benefits

It should be observed that persons who are found eligible for the "disability freeze" prior to age 50 will, upon attaining that age, presumably become eligible for monthly disability benefits.

On and after July 1, 1957, persons age 50 and over need no longer be referred for the "disability freeze" but should instead be referred as direct applicants for disability benefits.

3. Release of Information by Welfare Boards

When the Social Security Administration requests information to assist in determining an applicant's eligibility for any benefits, or for "disability freeze," the county welfare board is authorized to release such information from its records in accord with the principles stated in Ruling No. 20. Social data requested may be provided to OASDI in summary form. When medical information is requested, exact copies of reports, abstracts of hospital or clinic records, etc. shall be provided since this information will be used by professional medical personnel in determining disability status for disability benefits, or for the "disability freeze" provision of the law.

G. LUMP-SUM DEATH BENEFITS

1. Entitlement to Receive

If an insured wage earner or self-employed person dies, even though he is still working and is not yet receiving benefits, a lump-sum death benefit is payable whether or not the worker left a survivor eligible for monthly benefits.

The lump-sum death payment will be three times the primary insurance benefit, but not to exceed \$255. The claim for a death benefit must usually be filed within two years of the worker's death, but may be filed during an additional two year's period if the claimant can show "good cause" for failure to file within two years of the death.

If there is no surviving spouse, or if the surviving spouse was not living with the worker, or dies before the claim can be paid, then the person who pays the burial expenses may be considered entitled to the lump-sum payment.

State or local government units which pay the burial expenses of a deceased OASDI covered worker may file claims for reimbursement from the Social Security Administration when there is no surviving spouse entitled to claim the lump-sum payment.

In any case where the worker is survived by a spouse who is eligible to claim the lump-sum payment, an inquiry should be made as to the availability of such funds for burial expenses before any expenses are assumed by the county welfare board.

2. Filing for Death Benefit

A form entitled "Application for Lump-sum Death Payment" may be secured from and filed with the appropriate district office of the Social Security Administration.

Any authorized official of a State or local government unit may file an application on its behalf. A statement by the official on the application under "Remarks" that he is authorized to file, is acceptable evidence of his authority.

In filing a claim, the welfare board should also insert the following statement under "Remarks":

"Application is also made for the State's share of the lump-sum death benefit in accordance with the blanket authority furnished by the State to the Social Security Administration."

This procedure will avoid the necessity of making an application from both County and State, and will permit reimbursement to be handled in the usual manner.

H. OLD AGE, SURVIVORS AND DISABILITY INSURANCE PAYMENTS FOR INSTITUTIONAL PATIENTS

Since an increasing number of assistance clients are recipients of monthly benefits under the OASDI program, and some of these may have to be committed to mental institutions, it is important that the welfare boards understand the regulations of the Social Security Administration in such situations.

According to the regulations, benefits on behalf of incompetent adults may be paid to a guardian-in-fact. A person wishing to serve as guardian-in-fact makes application to receive benefits in behalf of the incompetent adult, and the Social Security Administration makes the determination as to who shall serve as payee. Whenever a suitable relative is available to act as guardian-in-fact, the Administration selects the relative. In the absence of a suitable relative, a director of a county welfare board or a superintendent of a mental hospital might be appointed as guardian-in-fact upon filing an application. Applications may be filed at a district office of the Social Security Administration.

Accordingly, it is suggested that whenever Old Age or Disability Assistance recipients, who are also recipients of monthly OASDI benefits, are committed to mental institutions, the county welfare board should proceed in accordance with the following principles:

1. If the order of commitment entered by the committing court takes cognizance of the patient's OASDI income, and specifies that such income shall be paid to the county treasurer or to the institution treasurer for contribution to the cost of the patient's maintenance, the county welfare board will assert no conflicting interest. In such cases the welfare board will not ordinarily have to exercise any further responsibility with respect to the OASDI benefits, unless and until any request is made to the welfare board to participate in the client's funeral expenses at time of death, in which event the welfare board will inquire into the matter of entitlement to a lump-sum death payment.

2. If the order of commitment does not take cognizance of the patient's OASDI income, the county welfare director should bring this to the attention of the

County Adjustor, so that arrangements may be made for application for guardian-in-fact by the County Adjustor or the institutional superintendent. If these officials fail to act within 30 days, then the county welfare director shall immediately notify the Social Security Administration concerning the recipient's incompetence and commitment, and shall apply for appointment as guardian-in-fact.

3. If the Social Security Administration should select a relative of the patient to serve as guardian-in-fact; i.e., as payee of the monthly benefits, the relative so designated should be interviewed to determine his plans for utilizing this income toward the cost of the patient's maintenance at the institution, or toward other special or incidental needs of the patient, or both. A full report concerning the relative's plans in this connection, with whatever recommendations may seem appropriate, should be directed to the attention of the committing court, through the County Adjustor, in order that the court may amend the order of commitment or take other appropriate action.

4. If the Social Security Administration should select the county director of welfare to serve as guardian-in-fact; i.e., as payee of the monthly benefits, the funds received should be credited to the client's subsidiary account in the clearing account and utilized, in the discretion of the welfare board, for any or all of the following purposes, desirably in the order of preference indicated unless circumstances make a different order of preference appropriate:

- a) Payment to or on behalf of the client for personal incidentals and other special requirements while a patient at the institution;
- b) Payments incident to the conservation and protection of the patient's estate, if any, such as payment of life insurance premiums, expenses of maintaining real property, etc.;
- c) Payment of burial costs and other terminal expenses at time of death;
- d) Reimbursement for assistance extended;
- e) Payments to the county treasurer or institution treasurer, as the case may be, with respect to the charge for maintenance at the institution.

DEPARTMENT OF INSTITUTIONS AND AGENCIES

Irving Engelman
Irving Engelman, Chief
Bureau of Assistance

IE/1CRd

Approved
Elmer V. Andrews, Director
Division of Welfare

Ruling Series No. 27

Insert in Handbook under section
"Rulings and Bulletins."

Destroy: Supplement No. 1 to Ruling No. 27, 12/9/54; Supplement No. 2 to Ruling No. 27, 4/12/55; Bulletin No. 31, 12/7/45; Supplement to Bulletin No. 31, 4/12/47; Supplement No. 2 to Bulletin No. 31, 5/5/47.

**REQUEST FOR FEDERAL OLD AGE, SURVIVORS, AND DISABILITY,
INSURANCE INFORMATION**

**TO: MANAGER
SOCIAL SECURITY ADMINISTRATION
DISTRICT OFFICE**

Date.....
FROM: (Name of Organization)

The representative payee or the individual(s) shown is unable to produce a copy of an award certificate or disallowance letter from the Social Security Administration with reference to a claim for benefits under title II of the Social Security Act, as amended.

It is requested that information available from your records, regarding the entitlement of the individuals listed to old-age, survivors and disability insurance benefits, be furnished this office. The information requested is required for use in determining our claimants eligibility. The information will be used only for the purpose stated and will not be disclosed to any other organization or individual, except in accordance with regulations or instructions of the Social Security Administration or as provided in the Administration - approved State public assistance plan.

NAME OF WAGE EARNER OR SELF-EMPLOYED INDIVIDUAL

SOCIAL SECURITY ACCOUNT NUMBER

NAME OF CLAIMANT	BIRTH- DATE	RELATIONSHIP TO WAGE-EARNER OR SELF-EMPLOYED INDIVIDUAL

SIGNATURE AND TITLE

SOCIAL SECURITY ADMINISTRATION REPORT

DATE.....
ACCOUNT
NUMBER.....

THE RECORDS OF THE SOCIAL SECURITY ADMINISTRATION FIELD OFFICE DISCLOSE THE FOLLOWING:

NAME OF CLAIMANT	TYPE OF BENEFIT	DATE OF BIRTH	MONTH OF ENTITLEMENT	MONTHLY BENEFIT	LUMP SUM	INITIAL PAYMENT	1ST CHECK DUE (ESTIMATED)

() NO CLAIM FILED () CLAIM IN PROCESS OF DEVELOPMENT

() DISALLOWED..... REASON.....
(DATE)

EXPLANATION OF ANY DEDUCTION IN THE INITIAL PAYMENT

(Sample Federal Form For Disability Freeze Referral)

TO: Social Security Administration

The following information is furnished in cooperation with the Bureau of Old Age and Survivors Insurance to identify or locate persons who are disabled and who may be entitled to protect their rights under the disability freeze provisions of the Social Security Act Amendments of 1954. It is understood that if the Bureau of Old Age and Survivors Insurance finds that the person named below is eligible to protect his rights he will be notified and given an opportunity to file an application.

Name and address of organization

Name and title of representative of organization furnishing information

.....
Name and address
of Disabled Person (

Based on our records it appears that the above individual:

1. Has approximately 5 years employment covered under the Social Security Act ☐
2. Has been disabled at least 6 months (and is still disabled) ☐

If individual does not meet these requirements do not complete this form

3. Date of birth of individual _____
4. His Social Security number is _____
(If number is not available but it appears he meets the employment requirement, furnish the following if available)

Place of birth _____

Father's(_____ Mother's
Name (_____ Maiden Name _____

5. Approximate date became disabled _____
6. Medical evidence of individual's disability is of record ☐Yes ☐No

If "Yes" indicate custodian of record:

DIRECTORY OF DISTRICT OFFICES OF OLD AGE, SURVIVORS, AND DISABILITY INSURANCE

	SERVICING OFFICE	ADDRESS
<u>ATLANTIC COUNTY</u>		
All	Atlantic City	Old Post Office Bldg., Pacific and Pennsylvania Avenues
<u>BERGEN COUNTY</u>		
Carlstadt	Passaic	Post Office Building
East Rutherford		
Garfield		
Hasbrouck Heights		
Lodi		
Lyndhurst		
North Arlington		
Rutherford		
Wallington		
Wood-Ridge		
Allendale	Paterson	245 Market Street
East Paterson		
Fair Lawn		
Franklin Lakes		
Glen Rock		
Hohokus		
Mahway		
Midland Park		
Oakland		
Ramsey		
Ridgewood		
Saddle Brook		
Waldwick		
Wyckoff		
All Others	Hackensack	389 Main Street
<u>BURLINGTON COUNTY</u>		
Green Bank	Atlantic City	Old Post Office Building, Pacific and Pennsylvania Avenues
Lower Bank		
New Gretna		
Bordentown	Trenton	Post Office Bldg., 402 E. State Street
Crosswicks		
Fieldsboro		
Beverly	Bristol, Pa.	114 Otter Street
Birmingham		
Browns Mills		
Burlington		
Chatsworth		

Directory of District Offices of Old Age, Survivors, and Disability Insurance, 1/57

SERVICING OFFICE		ADDRESS
<u>BURLINGTON (CONT'D)</u>		
Columbus	Bristol, Pa	114 Otter Street
Cookstown		
Delanco		
Edgewater Park		
Evansville		
Florence		
Fort Dix		
Hainesport		
Hartford		
Jobstown		
Juliustown		
Lumberton		
Masonville		
McGuire Air Force Base		
Medford		
Mount Holly		
New Lisbon		
Pemberton		
Rancocas		
Riverside		
Roebling		
Smithville		
Vincentown		
Whitesbog		
Wrightstown		
All Others	Camden	Room 228, Post Office Building
<u>CAMDEN COUNTY</u>		
All	Camden	Room 228, Post Office Building
<u>CAPE MAY</u>		
All	Atlantic City	Old Post Office Bldg., Pacific and Pennsylvania Avenues
<u>CUMBERLAND COUNTY</u>		
All	Bridgeton	100 North Pearl Street
<u>ESSEX COUNTY</u>		
East Orange	East Orange	426 Main Street
Livingston		
Orange		
West Orange		
Irvington	Irvington	1040 Springfield Avenue
Maplewood		
Milburn		
Short Hills		
South Orange		

Directory of District Offices of Old Age, Survivors, and Disability Insurance

SERVICING OFFICE		ADDRESS
<u>ESSEX (CONT'D)</u>		
Newark	Newark	1016 Broad Street
Belleville		
Nutley		
All Others	Bloomfield	National Newark and Essex Bank Building, 2 Broad Street
<u>GLOUCESTER COUNTY</u>		
All	Camden	Room 228, Post Office Building
<u>HUDSON COUNTY</u>		
All	Jersey City	900 Bergen Avenue
<u>HUNTERDON COUNTY</u>		
Baptistown	Trenton	Post Office Building, 402 East State St.
Flemington		
Frenchtown		
Lambertville		
Ringoes		
Rosemont		
Sand Brook		
Sergeantsville		
Stockton		
Three Bridges		
Treasure Island		
All Others	Easton, Pa.	204 Northampton Street
<u>MERCER COUNTY</u>		
All	Trenton	Post Office Bldg., 402 East State Street
<u>MIDDLESEX COUNTY</u>		
Dunellen	Elizabeth	268 North Broad Street
Middlesex		
New Market		
South Plainfield		
Avenel	Perth Amboy	Perth Amboy National Bank Bldg., 313 State Street
Barber		
Carteret		
Cliffwood Beach		
Colonia		
Fords		
Hopelawn		
Iselin		
Keasbey		
Lawrence Harbor		
Parlin		
Perth Amboy		
Port Reading		
Sewaren		
South Amboy		
Woodbridge		
All Others	New Brunswick	75 Paterson Street

Directory of District Offices of Old Age, Survivors, and Disability Insurance, 1/57

SERVICING OFFICE		ADDRESS
<u>MONMOUTH COUNTY</u>		
Belford	Perth Amboy	Perth Amboy National Bank Bldg., 313 State Street
Cliffwood		
Hazlet		
Keansburg		
Keyport		
Leonardo		
Matawan		
Middletown		
Morganville		
New Monmouth		
Port Monmouth		
Union Beach		
Wickatunk		
All Others	Asbury Park	Room 207, Tuttman Bldg., 620 Bangs Avenue
<u>MORRIS COUNTY</u>		
All	Morristown	17 South Street
<u>OCEAN COUNTY</u>		
Adamston	Asbury Park	Room 207, Tuttman Bldg., 620 Bangs Avenue
Bay Head		
Breton Woods		
Cassville		
Island Heights		
Lakehurst		
Lakewood		
Laurelton		
Lavallette		
Mantoloking		
Metedeconk		
New Egypt		
Normandy Beach		
Osbornsville		
Point Pleasant		
Seaside Heights		
Seaside Park		
Shore Acres		
Toms River		
Van Hiseville		
West Point Pleasant		
All Others	Atlantic City	Old Post Office Bldg., Pacific and Pennsylvania Avenues
<u>PASSAIC COUNTY</u>		
Clifton	Passaic	Post Office Building
Great Notch		
Passaic		
All Others	Paterson	245 Market Street

Directory of District Offices of Old Age, Survivors, and Disability Insurance, 1/57

	SERVICING OFFICE	ADDRESS
<u>SALER COUNTY</u>		
All	Bridgeton	100 North Pearl Street
<u>SOMERSET COUNTY</u>		
North Plainfield	Elizabeth	268 North Broad Street
Watchung		
Basking Ridge	Morristown	17 South Street
Bedminster		
Bernardsville		
Far Hills		
Gladstone		
Lyons		
Peapack		
All Others	New Brunswick	75 Paterson Street
<u>SUSSEX COUNTY</u>		
All	Morristown	17 South Street
<u>UNION COUNTY</u>		
All	Elizabeth	286 N. Broad Street
<u>WARREN COUNTY</u>		
All	Easton, Pa.	204 Northampton Street

January 24, 1957

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

Dear Secretary Patten:

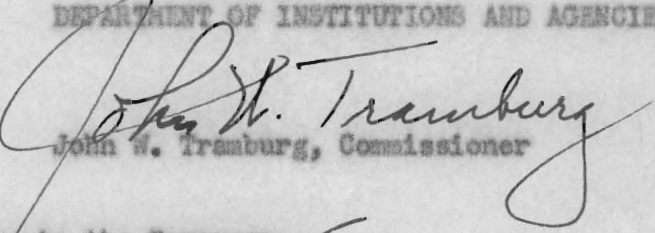
Enclosed herewith for filing are the following regulations of the
Bureau of Assistance of the Division of Welfare of this Department:

RULING NO. 27
Old Age, Survivors, and Disability Insurance

RULING NO. 27 - Supplement No. 1
Special Study of Assistance Cases Eligible for OASDI Benefits
As a Result of 1956 Amendments

Very truly yours

DEPARTMENT OF INSTITUTIONS AND AGENCIES


John W. Trumburg, Commissioner

JWT:4

CC: Brendan T. Byrne, Secretary to the Governor ✓
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 # RULING NO. 27
Supplement No. 1ISSUED: _____
(Date)REV.: 2/1/57
(Date)

TITLE: _____

SUBJECT: Special Study of Assistance Cases Eligible for OASDI Benefits As a Result
of 1956 AmendmentsSTATUTORY REFERENCE: 44:7-6, 7-23

Note: Previous Supplement No. 1 to Ruling No. 27, issued 12/9/54, and hereby officially cancelled, had not been on file with the Secretary of State as its content had been of an informational and not regulatory character.

Rogelman, Chief
Bureau of Assistance

Approved:

By: *John V. Tramburg*

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

1/57

SUPPLEMENT NO.1 TO RULING NO.27

SPECIAL STUDY OF ASSISTANCE CASES ELIGIBLE FOR OASDI BENEFITS
AS A RESULT OF 1956 AMENDMENTS

Major changes in Old Age and Survivors Insurance made by the 1956 amendments of the Social Security Act include some changes which will have an impact on the public assistance programs. Although the immediate effect of these amendments on public assistance is not expected to be large, the Federal agency is requiring reports on the extent to which public assistance case loads and costs are affected. The information is believed to be essential for both program planning and interpretation to legislatures, budget officials, and other groups concerned with the effect of the changes on public assistance.

The study will cover the thirteen month period beginning December 1, 1956 and ending December 31, 1957. Instructions outlining the requirements of the Federal study include the following comment:

"We regret very much that the transmittal of this plan after the effective date of one of the new eligibility provisions in the 1956 OASI amendments will mean additional work for some states. As a general operating principle we make every effort to notify State agencies of new reports or projects as far in advance of their effective dates as possible."

The State Bureau also regrets that this request was sent on such short notice. However the reports are mandatory and your cooperation in furnishing the necessary information is requested.

The Federal study material includes a recommended individual case schedule together with detailed instructions and interpretation of the data required. However, in order to simplify County Welfare Board reporting of the cases to be included in the study this Bureau has developed a monthly inventory form. The information required on this inventory form will provide complete data for many of the cases and the inventory form will provide sufficient data for identifying the cases requiring additional study. The follow-up study, as may be necessary, will be arranged county by county by Field Staff or correspondence.

The cases to be reported on the required monthly inventory are those which actively receive either OAA or DA at any time during the period December 1, 1956 through December 31, 1957, and which, while so receiving assistance, are awarded for the first time OASDI benefits resulting from any of the new eligibility provisions in the 1956 amendments.

For purposes of this study, include cases where the client's budget includes an allowance for a legally responsible relative (e. g. where the relative is providing care for the client and is himself a needy person), and such relative as the result of the 1956 amendments is found eligible for OASDI.

A copy of the inventory form is attached to this supplement; an additional supply will be made available for reporting purposes. The inventory should be prepared in three copies, two copies to be forwarded to this Bureau with Form OA-8 at the end of each calendar month. One copy of the inventory form should be retained by the County Welfare Board for administrative control and reference.

The first monthly report is required for the month of December 1956. Please prepare and submit this report as promptly as possible upon receipt of these instructions.

An explanation of the information required on the inventory form of the cases to be included in the study follows:

<u>Column No.</u>	<u>Description of Entries</u>
1	Number cases listed each month 1, 2, 3, 4, etc.
2	Self explanatory.
3	Self explanatory.
4	Enter name of legally responsible relative of an assistance recipient awarded an OASDI Benefit, if such individual was allocated income of the recipient by the County Welfare Board. This includes any case where the client's budget included an allowance for essential special services rendered by a legally responsible relative.
5	If an entry is made in Column No. 4, enter relationship of such beneficiary to the assistance recipient.
6	Enter class of benefit [1, 2, or 3]. See detailed description below.
7	Leave blank.
8	Enter the total amount of the first new payment, including any retro-active payments.
9	Enter monthly rate of benefit.
10-15	Leave blank.

The entry required in Column No. 5, Class of Benefit, shall be identified by the number 1, 2, or 3 as follows:

<u>Class</u>	<u>Description</u>
1.	<u>Persons eligible for benefits resulting from the provision reducing the retirement age for women to 62: [effective November 1, 1956]</u>
a.	Some women aged 62-64 with at least 1 1/2 years of employment; dependent husbands of such women, if 65 years of age or over; certain other dependents of such women.
b.	Wives aged 62-64 of retired insured wage earners with no child beneficiaries in their care. [As under the old law, the wife of a retired insured wage earner continues to receive benefits regardless of age if she has child beneficiaries in her care.]
c.	Widows and dependent mothers aged 62-64 of deceased insured wage earners.
d.	Some women aged 65 and over with at least 1 1/2 years of employment who were ineligible under the old law but are eligible under the new provision; dependent husbands of such women, if 65 years of age or over; certain other dependents of such women.
e.	Surviving dependents of some women who died after June 30, 1954 and who were 62-64 years of age at time of death.
2.	<u>Persons eligible for benefits resulting from the provision extending child's benefits to adult children who were disabled before age 18: [effective January 1, 1957.]</u>

a. Dependent disabled children aged 18 or over of deceased or retired insured wage earners, provided they become totally disabled before reaching age 18.

b. Mothers of such disabled children even if there are no other child beneficiaries in their care. [As under the old law, Mother's (or wife's) benefits are paid to a mother who has in her care any child entitled to child's benefits.]

3. Persons eligible for disability insurance benefits for qualified disabled wage earners aged 50-64: [effective July 1, 1957]

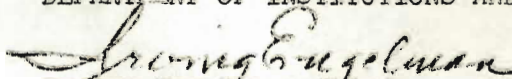
Totally disabled persons aged 50-64 with approximately 5 years of employment and who have been disabled at least 6 months. No benefits are paid to dependents of such disabled wage earners.

The first monthly report (for December 1956) will include only cases identified in Class 1, above. The monthly report for the period January through June 1957 will include cases identified both as Class 1 and Class 2, above. The reports for the period July through December 1957 will include cases identified in all three classes of benefit. An inventory report must be submitted for each month whether or not any cases are listed. A negative report may be filed with a notation in Column No. 2, "No. cases."

The State Bureau has no way of estimating the number of cases to be reported in the study. The supply of inventory forms of sixty copies will probably meet the individual Welfare Board needs for the period of the study.

Your attention is directed to Supplement No. 1 to Bulletin No. 14, Instructions for Preparation of Semi-Annual Statistical Report on OASI Recipients. The requirement for submittal of the semi-annual report for OAA cases remains in effect. Furthermore, this Supplement will shortly be issued in revised form to require a similar report for DA cases.

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. 1 to Ruling No. 27

Insert in Handbook under section
"Rulings and Bulletins."

COUNTY WELFARE BOARD

INVENTORY FOR THE MONTH OFCOVERING OAA OR DA CASES RECEIVING
OASDI BENEFITS AS A RESULT OF NEW ELIGIBILITY PROVISIONS IN 1956 AMENDMENTS OF THE SOCIAL SECURITY ACT

[illegible]