

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

BUREAU OF ASSISTANCE

REGULATION # _____
Manual of Administration

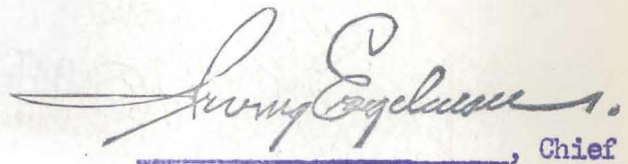
Sections ISSUED: 7/1/52, 3/5/53, 10/2/52
(Date)

REV.: _____
(Date)

TITLE: Policy and Procedure, OAA, DA, GA

SUBJECT: _____

STATUTORY REFERENCE: 44:7-6


_____, Chief

Bureau of Assistance

Approved:

By: _____

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

000068

TRANSMITTAL LETTER

MANUAL SERIES NUMBER 2

March 5, 1953

TO: County Welfare Boards
Municipal Assistance Boards

The Bureau is forwarding herewith copies of additional material to be added to the Manual of Administration as follows:

<u>Title</u>	<u>Page Numbers</u>
Part II The Individual and Public Assistance	
(a) Preliminary Statement	2000.1-2000.16
(b) The Application Process	2010-2024

This transmittal letter and accompanying material is being issued for distribution to each staff member who has been assigned a Manual copy. In distribution the new material please see that each person receives the copy which bears the serial number corresponding to the serial number assigned to him.

Instructions and Superseded Items

The Manual material listed above supersedes the following earlier policy material:

Old Age and Disability Assistance

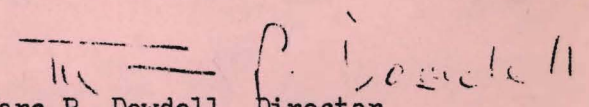
Supplement No. 2 to Ruling No. 25, Principles and Definitions in the Application Process, issued 9/26/51 - obsolete; to be removed from "Handbook", Ruling Series.

General Assistance

No similar material previously issued.

Very truly yours,

DEPARTMENT OF INSTITUTIONS AND AGENCIES


Marc P. Dowdell, Director
Bureau of Assistance

Approved: 3/5/53
Elmer V. Andrews
Deputy Commissioner in Charge of Welfare

MPD:MCRdj

000063

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

TRANSMITTAL LETTER

MANUAL SERIES NUMBER 1

October 31, 1952

TO: County Welfare Boards
Municipal Assistance Boards

For some time the Bureau of Assistance has recognized the desirability of greater standardization in methods of issuing policy and procedural instructions, and the need for codification of all such material in a logical, systematic form for the use of the staffs of county welfare boards and municipal departments of welfare. The Bureau is therefore engaged in preparing a comprehensive Manual of Administration and is ready at this time to issue some initial material.

The project of transposing all current policy and instructions for the three assistance programs (General Assistance, Disability Assistance, Old Age Assistance) will be a continuing one over an extended period. The plan is to issue each Part or Section of a Part as it is completed, and to advise you as each such portion is issued concerning its effect on previous policy and instructions.

We hope that you will find the Manual more helpful in administering the programs than the present complicated series of rulings, bulletins, regulations and directives. The Bureau will welcome suggestions if you find ways in which you believe the material could be improved either in format or content.

The first portion of material for the Manual of Administration, Bureau of Assistance, is officially released herewith, and includes the following:

<u>Title</u>	<u>Page Numbers</u>
(a) General Table of Contents (Temporary)	--
(b) Table of Contents for Introduction	--
(c) Information on the Manual	0000 - 0080
(d) Determination of Eligibility Factors	2200.1 - 2200.42
(e) Age and Initial Eligibility	2210 - 2217
(f) Social Service Exchanges	2880 - 2889

This transmittal letter and accompanying material is being issued to each county welfare board in a sufficient number of copies to permit individual distribution to all executive and supervisory staff, and to all case work staff. The Bureau is maintaining a record of the serial numbers issued to each county, and future material will be distributed accordingly. Each county director of welfare is asked to maintain, in turn, a record of the

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serial numbers assigned to individual staff members, and to hold each such staff member responsible for the maintenance in good order of the Manual copy assigned to him.

With respect to municipal departments of welfare, this material is being initially distributed on the basis of one copy for each participating municipality. However, each municipal director of welfare is requested to inform the Bureau by letter if additional copies are desired, specifying the number of copies and the positions of the staff members to whom such additional copies will be issued. Thereafter, the Bureau and the municipal director will maintain control records of the serial number assignments in the same manner as described above for county offices.

Instructions on Superseded Items

The Manual material listed above as items (d), (e), and (f) supersedes the following earlier material as indicated:

Old Age and Disability Assistance

Ruling No. 17, Verification of Age, issued 6/1/48 -- obsolete;
to be removed from "Handbook".

Bulletin No. 3, Sources of Evidence of Age, issued 6/2/48 --
obsolete; to be removed from "Handbook".

Ruling No. 23, Social Service Exchanges, issued August, 1950 --
obsolete; to be removed from "Handbook".

Bulletin No. 13, Cooperation with Local Public Agencies, revised
2/1/49 -- Last paragraph, under heading Social Service Ex-
changes, is obsolete; to be crossed out and replaced by the
following pen-and-ink insertion "(See Social Service Ex-
changes, items 2880 - 2889, Manual of Administration)."

General Assistance

Regulation 4.501, as revised 7/1/44 -- On page 2, under (2) Re-
ferral, the fourth paragraph entitled Documentary Evidence is
obsolete; to be crossed out and replaced by the following pen-
and-ink insertion "(See Determination of Eligibility Factors,
items 2200.1 - 2200.42, Manual of Administration.)"

Very truly yours,

DEPARTMENT INSTITUTIONS AND AGENCIES

M. Dowdell
Marc P. Dowdell, Director
Bureau of Assistance

MPD:IEC

Approved: 10-28-52

Elmer V. Andrews

Deputy Commissioner in Charge of Welfare

STATE OF NEW JERSEY
DEPARTMENT OF INSTITUTIONS AND AGENCIES
DIVISION OF WELFARE

MANUAL OF ADMINISTRATION
(BUREAU OF ASSISTANCE)

000068

MANUAL NUMBER _____

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

Manual of Administration

Bureau of Assistance

Old Age Assistance, Disability Assistance, and General Assistance

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(TEMPORARY)

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 - 1410 Attitudes and Responsibilities
- 1500 Attorney-General's Functions in Public Assistance

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- 2000 Application Process
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- 2300 Determination of Need and Grants (Budget Manual)
- 2400 Initial Payments
- 2500 Determination of Factors for Continuing Eligibility
- 2600 Continuation, Adjustment, and Termination of Payments
- 2700 Records
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 - 2810 Complaints and Fair Hearings
 - 2820 Safeguarding Information
 - 2830 Other Responsibilities and Services
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Old Age Assistance, Disability Assistance, and General Assistance

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Bureau of Assistance

Introduction

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0000 - 0099	Information on the Manual	Introduction 7/1/52
0000	<u>INFORMATION ON THE MANUAL</u>	
0010	<u>NATURE OF MANUAL</u>	
	The Manual of Administration for the Old Age Assistance, Disability Assistance, and General Assistance programs is the official medium for the policy and procedure developed by the New Jersey Department of Institutions and Agencies to carry out the Old Age and Disability Assistance Law as well as the General Public Assistance and Legal Settlement Laws.	
0020	<u>USE OF MANUAL</u>	
	Since the Manual of Administration is designed for the use of agency staff, each staff member should know the form of the Manual and the material which it contains so that he can use it easily and effectively.	
0021	<u>Devices for Increasing Usefulness of Manual</u>	
	Several devices for increasing the usefulness of the Manual for the staff member have been utilized. They include the General Table of Contents, Tables of Contents for Parts, Table of Contents for Chapters, Subject Index, Appendix, Annotations, Coding, Page Identification, and Cross References.	
0021.1	<u>General Table of Contents</u>	
	The General Table of Contents (in the beginning of the Manual) presents the major divisions of classified and codified material in the order in which they appear in the Manual.	
0021.2	<u>Tables of Contents for Parts</u>	
	The Tables of Contents for each Part of the Manual list in detail the particular information contained within a designated Part.	
0021.3	<u>Tables of Contents for Chapters</u>	
	Wherever necessary, additional Tables of Contents will be furnished for Chapters of Parts.	
0021.4	<u>Subject Index</u>	
	The Subject Index at the back of the Manual presents alphabetically the subjects dealt with in the Manual and the exact place where information about a specific subject may be found. The Subject Index will be issued once a year in revised form.	
	The Subject Index should be kept current by listing Chapter titles and corresponding code numbers as new or revised Manual material is received during the year.	

0021.5 - 0021.73

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0000 - 0099	Information on the Manual	Introduction 7/1/52
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0021.5 Appendix

The Appendix which follows the Subject Index contains bulky or lengthy reference material, such as laws, resolutions of the State Board of Control, charts, bibliographies, and the like.

0021.6 Annotations

Annotations are additions to the primary text of the Manual, such as illustrations, elaborations, or comments. They are distinguished from the regular material through the use of separate colored pages.

Annotations are to be inserted immediately after the regular material of the Manual to which they relate. They do not change the context of the material to which they are added.

0021.7 Coding

The Coding of Manual material is designed to facilitate reference by specific identification of the classified material. The key to the coding is as follows:

0021.71 Part - - The first major breakdown of Manual material is by Parts. Each Part is designated by a Roman Numeral, an appropriate title for the particular subject matter contained within it, and a separate series of Arabic numbers in the thousands. Example, Part I - Legal Framework of Public Assistance, 1000 - 1999; Part II - The Individual and Public Assistance, 2000 - 2999, etc. It will be noted that the first digit of the thousands corresponds to the Roman numeral of the Part. The Roman numeral for the Part appears on the left side and the title of the Part on the right side at the top of each page under the words "Manual of Administration."

0021.72 Chapter - - The major breakdown of the Part is by Chapters which are identified both by an appropriate title and the second digit or hundred number of the appropriate thousand series. Example, the first Chapter of Part I is "1000 The Community - Creator of Public Assistance," with subsequent Chapters running through to 1900 if necessary. The identification of the Chapter appears under the identification of the Part and includes the appropriate number range, title, and the date of issuance. Each Chapter begins on a new page to facilitate ease of reference and revision.

0021.73 Section - - The major breakdown of the Chapter is by Sections which are identified both by an appropriate title and by the third digit or tens of the series. Example, the first Section of the last Chapter of Part II is "2910 Complaints and Fair Hearings," with succeeding Sections running through 2990 if necessary.

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0021.74	<u>Sub-Section</u> - - The major breakdown of the Section is by Sub-Sections which are identified by an appropriate title and the fourth digit in the series. Example, Sub-Sections may run from - - - <u>1</u> through to - - - <u>9</u> .	
0021.75	<u>Item</u> - - The major breakdown of the Sub-Section is by Items which are identified by an appropriate title and decimals running in sequence. Example, - - - - <u>.1</u>	
	Additional breakdowns are identified by additional digits after the decimals or by alphabetical or numerical offsets.	
0021.8	<u>Page Identification</u>	
	Each page will be identified in the upper right hand corner by appropriate numbers corresponding to the material presented on that particular page. Thus, the first page of the Introduction with material ranging from 0000 - 0021.4 is identified by the number "0000 - 0021.4" in the upper right hand corner above the words "Manual of Administration."	
0021.9	<u>Cross References</u>	
	The caption "Cross References" will appear with proper identification under material which is related to other pertinent material(s) of the Manual. The caption will generally contain the coding numbers and the title of the cross referenced material.	
0030	<u>RESPONSIBILITY OF STATE AGENCY FOR EFFECTIVE USE OF MANUAL</u>	
	The Manual of Administration should be used consistently and responsibly by staff of every county welfare board and municipal department of welfare in the State. The Bureau of Assistance, through official channels, will observe whether policy is being used, how valid it is in actual operation, and whether a particular policy should be initiated, revised, or deleted. This responsibility of the Bureau of Assistance is discussed at length in Part VI on "State Supervision of Local Administration 6000 - 6999."	
0040	<u>REQUIREMENTS AND RECOMMENDATIONS</u>	
	The Manual of Administration will present both requirements of public assistance laws and recommendations.	
0041	<u>Requirements</u>	
	Requirements include:	
	<ol style="list-style-type: none"> 1. Provisions of applicable laws and statutes which set forth conditions to be met by the client and the administrative requirements to be met by the governmental agency as the basis for public assistance programs. 2. Policies. 3. Procedures and essential reports and forms. 	

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Introduction

0000 - 0099

Information on the Manual

7/1/52

0041.1 Policy Defined

Policy is the law of conduct controlling agency staff in accomplishing their responsibilities for the program. Policy is limited by law and is effective only as it is consistent with law.

0041.2 Procedure Defined

Procedure encompasses the actual operating methods of agency staff in using policy. Procedure may be either required or recommended.

0041.3 Mandatory Nature of Policy and Procedure

Policy and required procedure are mandatory by intent of law and are binding on agency and staff. They are generally recognizable by the use of such words as "shall," "must," "required," and the like.

0042 Recommendations

Recommendations are those suggestions which are not required by law or established policy.

0042.1 Discretionary Nature of Recommendations

Recommendations are discretionary, optional, or advisory in effect. They are recognizable by the use of such words as "may," "can," or similar descriptive context which clearly distinguishes their character.

0050 METHOD OF ISSUANCE OF MANUAL

The Manual of Administration is a loose-leaf, mimeographed document which will be issued by the Bureau of Assistance in installments as portions are finished. Portions marked with asterisks indicate material in the process of development which have not been issued. Revision of Manual material will follow as needed.

0060 DISTRIBUTION OF MANUAL

Each copy of the Manual will be numbered before distribution is effected. A designated number of copies will be distributed to the agencies by the Bureau of Assistance to enable each member of the administrative and case work staffs to have his own complete Manual. In addition, portions of Manual material will be distributed to other staff members relative to their special field. It will be the responsibility of the agency to distribute its supply of Manuals promptly to staff.

Inquiries by the agency relative to the distribution of the Manual shall be directed to the Bureau of Assistance.

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		Introduction
0000-0099	Information on the Manual	7/1/52

0070 MAINTENANCE OF MANUAL

Each numbered set of manual material shall be kept in a standard, loose-leaf ring binder, and the binder shall bear the corresponding number.

All new or revised material shall be inserted at once in the proper place in the Manual. All material which becomes obsolete and is so designated by the Bureau of Assistance shall be removed from the Manual. One administrative copy of obsolete material shall be kept by the agency. It is recommended that the agencies receiving copies of the Manual assign responsibility for keeping them up to date to one person.

0071 Transmittal Letters - Manual Series

A letter known as the "Transmittal Letter - Manual Series" accompanies each piece of Manual material issued by the Bureau of Assistance. The transmittal letters are in the same general form and include such information as the date and number of the transmittal letter; a list of pages or forms being sent with appropriate identification; specific instructions about insertion and/or removal of pages; the dates of issuance and effectiveness and such comments on the transmitted material which may be necessary.

0080 OTHER ASSISTANCE PUBLICATIONS

In addition to releasing Manual material, the Bureau of Assistance will also issue monographs, handbooks, or pamphlets on subjects not suitable for inclusion in the Manual.

The Individual and Public Assistance

3/5/53

DISCHARGES RESPONSIBILITY

[Cross Reference: 1000* The Community - Creator of Public Assistance]

Public assistance is a financial resource created by law to
the resources of the individual in need.

SECRET

Public assistance has the following distinguishing characteristics:

[Cross Reference: Part I* Legal Framework of Public Assistance]

2000.131-2000.15

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2000.131
(Contd)

2. It is part of an over-all governmental organization and administration.

[Cross Reference: 0200* Public Welfare Organization in
New Jersey
0400* Federal Security Agency]

3. It is accountable to the over-all governmental unit and to the community for what it is and how well it is serving the public.

[Cross Reference: Part III* Financial Administration
Part IV* Statistical Reporting and Records
Part VI* State Supervision of Local
Administration]

4. It is financed by public funds.

[Cross Reference: Part III* Financial Administration]

5. It is administered by public employees.

[Cross Reference: Part II* The Individual and Public Assistance
Part VII* The Staff Member and Personnel
Administration]

2000.14 PUBLIC ASSISTANCE LAWS

The conditions of eligibility for aid in publicly supported programs are specified basically in law, and interpreted and elaborated by specific administrative policy and procedure. Such specification is directed toward inclusion of all persons meeting the eligibility requirements as well as consideration of their eligibility under uniform application of the law by the administrative authority.

2000.15 BASIC PRINCIPLES OF ADMINISTRATION

To accomplish the purpose of the public assistance laws, the Bureau of Assistance develops policy and procedure based on the following principles of administration.

1. Opportunity to Apply

Any person believing himself eligible shall be assured an opportunity to apply for assistance.

2000.15

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2000.15
(Contd)

2. Decision to Apply

The decision to apply rests with the person or his authorized agent.

3. Recognition of Individual and His Problem

The individual requesting help shall be recognized as a person who is seeking a solution to a problem. It is the responsibility of the agency to help him in identifying the problem, to explain to him whether the problem does or does not come within the scope of the agency's function, and to inform him of other appropriate services and resources in the community which are available.

4. Client Self-Directing

The client shall direct his affairs insofar as he is physically and mentally able. This principle is based on the fact that economic dependency does not deprive a needy person of his civil rights nor does it release him from his normal duties as a responsible member of the community.

5. Opportunity to Withdraw

An applicant shall be assured an opportunity to withdraw his application at any point between his request for assistance and determination of his eligibility or ineligibility by the agency.

The decision to withdraw rests with the individual or his authorized agent.

6. Client Primary Source of Information

The client shall be considered the primary source of information about himself and his circumstances in determining his eligibility for assistance. Secondary sources of information are used as required.

7. Prompt Consideration and Notification

Each application shall be considered promptly and impartially. Subsequently, each applicant shall be notified promptly in writing of the decision on his eligibility.

These principles hold also for a recipient when any change in his circumstances indicates a change in his requirements or status.

2000.15-2000.16

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The Individual and Public Assistance

Preliminary Statement

3/5/53

2000.15
(Contd)

8. Uniform Basis for Determining Need

Assistance payments to eligible persons shall be determined on a uniform basis through the budgetary method and established standards.

9. Assistance to All Eligible Persons

Assistance payments shall be made to all eligible persons so long as any such payments are made in the state.

10. Assistance by Money Payments

Assistance shall be granted in the form of money payments through checks to the recipient, his legal guardian, or, under certain specified conditions, to other persons on the recipient's behalf.

11. No Duplication of Assistance

A recipient shall receive assistance payments from only one public assistance program at any particular time.

12. Adherence to Law and Regulation

There shall be strict adherence to law and complete conformity with administrative regulation. Requirements other than those established by law or pursuant thereto shall not be imposed on any person as a condition of receiving assistance.

13. Review of Agency Action

The client shall have the right to request a review of agency action or inaction whenever he believes that he has not been given full consideration under law.

14. Confidential Nature of Information

Information about the client and his circumstances shall not be disclosed except to those persons and agencies entitled to such information by law or regulation.

2000.16

PUBLIC ASSISTANCE IN NEW JERSEY INCLUDES FIVE PROGRAMS

There are five public assistance programs in New Jersey. Four of them provide for specific groups or categories of needy individuals- the aged, the blind, the permanently and totally disabled, and dependent children. These categorical programs include Old Age Assistance, Aid to the Blind, Aid to the Permanently and Totally Disabled (Disability Assistance), and Aid to Dependent Children (Home Life Assistance). The fifth is General Assistance which provides for those needy persons who do not qualify for categorical assistance.

[Cross Reference: 0100* Public Welfare in New Jersey]

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Part II	The Individual and Public Assistance
2010-2099	The Application Process 3/5/53

2010 DEFINITIONS2011 Definition of the Application Process

The application process is the means by which an individual's request for assistance for himself or his dependents is initiated, considered, and brought to an official disposition.

The application process includes all activity relating to an application for assistance. The application process begins with the individual's first statement to the agency that he wishes to receive assistance and continues in effect until there is an official disposition.

2012 Other Official Terms

The official definitions of other terms used in the application process are as follows:

2012.1 Applicant

An applicant is an individual who has made an affirmative decision to apply for public assistance and whose application has not been officially disposed of by the agency.

The term "applicant" also includes the individual on whose behalf such a decision is made by his authorized agent in order to initiate an application for assistance as stated below in 2012.2 and 2012.21.

2012.2 Authorized Agent

An authorized agent may be a legally appointed guardian or an individual who has been empowered in writing to act on behalf of an applicant. Without such legal or written authority, the person who claims to be acting on behalf of a prospective applicant shall be considered only an inquirer, informant, or referring party. The sole exception to this policy occurs with respect to persons alleged to be mentally incompetent as cited below in 2012.21.

2012.21 Authorized Agent for Persons Alleged to be Mentally Incompetent

If the person is alleged to be mentally incompetent, the agency may accept any one of the following in the order of preference indicated to act as his authorized agent for the sole purpose of initiating an application for assistance:

- a. A legally appointed guardian,
- b. A relative by blood or marriage,

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- 2012.21 (Contd.)
- c. A staff member of an institution or facility in which the person is receiving care,
 - d. A staff member of a public or private welfare agency of which the person is a client, or
 - e. A physician or attorney of whom the person is respectively a patient or client.

2012.3 Recipient

A recipient is an applicant who has been found eligible for an initial payment of assistance. The individual retains his status as a recipient until it has been officially determined that he is no longer eligible.

2012.4 Client

The word "client" is a general term for any person who is applying for or receiving assistance when it is not necessary to particularize the individual's status.

2012.5 Inquiry

An inquiry is a request for information in which the inquirer:

- a. Does not identify a specific individual as desiring assistance; or
- b. Cannot identify himself as an authorized agent for a specific individual; or
- c. Delays in making an immediate decision to apply; or
- d. Decides not to make an application.

2012.6 Application

An application is an affirmative oral or written statement by which an individual requests assistance following an interpretation of the program.

2012.61 Reapplication

A reapplication is a similar statement by an individual whose previous application was rejected and who requests reconsideration of his current eligibility.

2012.62 Reopened Case

A reopened case relates to the statement of a former recipient who requests reconsideration of his current eligibility.

2012.7-2012.8

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2012.7 Disposition of Application

The disposition of an application is the official determination by the agency that one of the following actions is appropriate:

2012.71 Approved

Approved means that the applicant has been determined to be eligible for assistance.

2012.72 Rejected

Rejected is an inclusive term for the following actions: denied, dismissed and withdrawn.

2012.721 Denied

Denied means that the applicant has been determined to be ineligible for assistance for a specific reason.

2012.722 Dismissed

Dismissed means official recognition that eligibility cannot be determined because:

- a. The applicant died or moved to another jurisdiction within New Jersey during the application process; or
- b. The applicant cannot be located; or
- c. The application was registered in error.

2012.723 Withdrawn

Withdrawn means that the applicant or his authorized agent decided not to pursue his application further and requested orally or in writing that the agency terminate its activity on the case.

[Cross Reference: 2100* Initial Eligibility]

2012.8 Assistance Payment

An assistance payment is the money amount authorized by the agency and issued in the form of a check to a recipient, his legal guardian or, under certain conditions, to other persons on the recipient's behalf.

[Cross Reference: 2400* Initial Payments]

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2020 RESPONSIBILITIES IN THE APPLICATION PROCESS

2021 Old Age Assistance and Disability Assistance

2021.1 Federal Requirements for State Plans

Under the Federal Social Security Act, it is required that every approved state plan for the administration of categorical assistance shall:

"1. Provide that no person shall be refused the opportunity to apply....

"2. Provide for prompt and efficient carrying out of the application process.

"State plans must

"1. Specify a time period to serve as a standard of reasonable promptness for completing the application process in all but exceptional cases.

"2. Provide for informing claimants (a) of the agency's standard of promptness so that each may know the time period within which he should expect action on his claim, and (b) of his right to request a hearing on the basis of the promptness requirement if action is not taken within the specified period to furnish assistance or notify him of his ineligibility.

"3. Provide for a determination of eligibility or ineligibility with respect to each application, subject to an applicant's right to decide not to pursue his application further.

"4. Provide that assistance shall be paid to each eligible applicant, and that assistance shall not be withheld from an eligible person so long as any payments are being made under the specific category.

"5. Establish a basis for review of action on applications by providing for the maintenance of identifiable records concerning all applications.

"6. Provide applicants with a basis for taking appropriate steps to express dissatisfaction with agency action or failure to act by:

"a. Establishing procedures for notifying applicants in writing that assistance has been authorized in a stated amount, or that it has been denied, giving the reason for denial.

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2021.1 (Contd) "b. Establishing methods of notifying each applicant in writing of his rights to a fair hearing and the method by which he can obtain a hearing.

"7. Provide for statistical reporting to the [Federal] Bureau of Public Assistance of applications."

2021.2 Responsibilities of State Bureau in Application Process - OAA and DA

Pursuant to statutory authority, the Department of Institutions and Agencies, through the State Bureau of Assistance, establishes policy and procedure on the application process for OAA and DA and supervises the operation of and compliance with the policy and procedure so established. The Bureau establishes and supervises such policy and procedure on a basis of conformity with the cited Federal requirements.

2022 General Assistance

The Department of Institutions and Agencies has both the statutory authority and responsibility to prescribe policy and procedure on the application process for GA to the same extent as it has for categorical assistance. This authority and responsibility have been vested in the Bureau of Assistance.

2023 Responsibilities of Agency - OAA, DA, and GA

The agency has the responsibility in the application process to:

- a. Receive applications;
- b. Interpret the purpose and eligibility requirements of a particular program and indicate the applicant's rights and responsibilities under its provisions;
- c. Make known to the applicant appropriate resources and services both within the agency and the community, and, if necessary, assist him in using them;
- d. Assist the applicant in exploring his eligibility for assistance;
- e. Consider with the applicant his budgetary requirements in relation to his available income and resources;
- f. Determine and report initial eligibility promptly;

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2023 g. Assure the prompt issuance of initial payments to eligible persons
(Contd) and prompt notification to ineligible persons; and

h. Account to the Bureau of Assistance for all applications.

2024 Responsibilities of the Applicant

As a participant in the application process, the applicant has the responsibility to:

- Explain the problem which brought him to the agency and what he thinks the agency should do to help him meet the problem;
- Assist the agency, within his capacity to assist, in securing evidence that corroborates his statements; and
- Report promptly any change affecting his circumstances.

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2200 - 2299

Determination of Eligibility Factors

7/1/52

2200.1 PRELIMINARY STATEMENT

This Chapter presents policy and procedure for the determination of all eligibility factors and detailed instructions for each eligibility factor other than need.

The information to determine the factors of eligibility shall be secured in so far as possible from the client and from evidence in his possession or accessible to him. In some instances, it will be necessary for the agency to secure the required information.

The following general policy and procedural statements shall govern the determination of all eligibility factors.

2200.2 SOURCES OF EVIDENCE

The client's statements regarding his eligibility are evidence. However, for purposes of public assistance, the client's statements must be consistent with surrounding circumstances. If his statements are incomplete or questionable, they shall be substantiated by corroborative evidence from other pertinent sources.

2200.21 Documentary Sources

Documentary sources of evidence present factual information recorded at some previous date by a disinterested party and filed as part of a record. They are usually in the form of certificates, records, legal papers, insurance policies, licenses, bills, rent receipts, etc.

2200.22 Non-Documentary Sources

There will be instances in which documentary evidence cannot be secured, or, even when documentary evidence is secured, it may be incomplete or questionable. In these instances, non-documentary evidence in the form of factual statements from reliable sources may be secured.

2200.3 EVALUATION OF EVIDENCE

The evidence secured must be evaluated before a decision can be made. In other words, evidence must be analyzed and weighed against certain criteria in order to determine its value as proof.

2200.31 Criteria for Evaluating Evidence

The following criteria shall be observed by the agency in evaluating evidence to be used in the determination of eligibility.

2200.311 - 2200.42

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2200.311 Authenticity of Evidence

Authenticity of evidence is tested through evaluation of the source, originating circumstances, date, form of presentation, etc.

2200.312 Freedom From Bias

Evidence is tested for freedom from bias through consideration of the purpose for which the original information was recorded and the degree of bias that may have entered into such a record. For example, evidence to be deemed free from bias for purposes of public assistance is that evidence which has not been influenced at the time of its preparation by consideration of qualifying for assistance.

2200.313 Relevancy

Relevancy of evidence is tested through evaluation of the relatedness of the evidence to the particular factor being determined. For example, a receipt for real estate taxes may furnish evidence of a person's ownership of property, but may not in and of itself be proof of residence.

2200.314 Consistency

Consistency of evidence is tested through evaluation of the agreement of two or more sources of evidence, including client's statements. If evidence is not in agreement, the conflict must be resolved and a logical decision made as to the relative weight of the evidence.

2200.4 RECORDING OF EVIDENCE

No evidence shall be considered by the agency in the determination of eligibility unless it has been recorded in the case record.

2200.41 Recording of Documentary Evidence

The recording of documentary evidence shall include the source of such evidence, identifying information about it, the facts verified, and a statement that the agency representative personally examined the evidence.

When evidence is received by letter, the recording shall present identification of the source of the information, a description of the document, and a condensed statement of pertinent facts said to be in the document.

2200.42 Recording of Non-Documentary Evidence

In recording non-documentary evidence, the agency representative shall state the various sources of verification explored as well as the pertinent facts which are being used to verify eligibility.

2210 - 2211.3

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2210 AGE AN ELIGIBILITY FACTOR SPECIFIED IN LAW

Age is specified in law as an eligibility factor for all public assistance programs except GA. However, legal age requirements vary from program to program as indicated below.

2210.1 Old Age Assistance

To be eligible for OAA, the person must have attained the required age of 65 years.

2210.2 Disability Assistance

To be eligible for DA, the person must have attained the minimum required age of 18 years but be less than the maximum required age of 65.

2210.3 Special Aspects of Age in General Assistance

Since age is not a requirement for GA, a needy aged person 65 years old or more not receiving OAA, or a needy disabled person between 18 and 65 years of age not receiving DA, is not barred by reason of age from applying for or receiving GA if he is otherwise eligible.

2211 DETERMINATION OF AGE

It is necessary in all public assistance programs except GA to determine whether the person meets the legal age requirements of a particular form of assistance before a decision of eligibility can be made. The determination of attained age is a satisfactory basis for initiating assistance payments to those individuals otherwise eligible whose exact date of birth cannot be determined. In those instances when the year of birth can be determined but not the exact month or day of birth, the arbitrary date of July 1 shall be assumed to be the month and day of birth.

2211.1 Old Age Assistance

To be eligible for OAA, there must be a determination that the applicant is 65 years old or more.

2211.2 Disability Assistance

To be eligible for DA, there must be a determination that the applicant is at least 18 years of age, but less than 65.

2211.3 General Assistance

While the person's age need not be determined for GA, it is recommended that whenever evidence of age is readily available it should be secured and recorded for purposes of future reference.

(Cross Reference: 2200.1 Preliminary Statement)

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2212

EVIDENCE OF AGE

Evidence of age is necessary in all public assistance programs except GA to determine whether the applicant is of the required age. The applicant shall support his statement that he is of eligible age by presenting one acceptable record of age. No further search need to be made if one such record is available. However, if the record initially available does not support the applicant's statement, effort shall then be made to secure other evidence. In selecting the source and procedure to be used, the reliability and accessibility of the evidence applicable to the particular situation shall be considered.

As a general rule, records shall be used which are at least one year old.

2213

EVALUATION OF EVIDENCE OF AGE

The factor of age shall be determined through evaluation of acceptable evidence of age. In this evaluation, it must be kept in mind that the different sources of evidence vary in reliability.

2213.1

Criteria in Evaluation of Evidence of Age

The following specific criteria will govern in determining the relative reliability of evidence of age.

- a. The time at which the record was made. Greater reliability is placed on older records.
- b. The opportunity which the person, agency, institution, etc., making the statement had to secure such knowledge.
- c. The reason for stating the age at the particular time.
- d. The interest of the person, agency, or institution in furnishing the information.

The final responsibility for deciding on the relative weight of evidence is vested in the agency.

(Cross References: 2200.3 Evaluation of Evidence
through
2200.314 Consistency)

2214

SOURCES OF EVIDENCE OF AGE

Acceptable evidence of age may be secured from the sources suggested below.

2214.1 - 2214.114

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2214.1 VITAL STATISTICS RECORDS

2214.11 Birth Certificate of Applicant

A properly authenticated birth certificate issued at the time of the applicant's birth or as a delayed certificate gives conclusive evidence of age.

2214.111 Applicants Born in New Jersey

An applicant born in New Jersey may secure a birth certificate from the Bureau of Public Health Statistics, Division of Vital Statistics and Administration, New Jersey Department of Health, Trenton. However, an applicant will generally find it more convenient to apply for his birth certificate directly at the proper municipal bureau of vital statistics. An applicant may obtain his copy without cost if he indicates that the information is to be used in his application for public assistance.

2214.112 Applicants Born Outside of New Jersey

An applicant born outside of New Jersey but in the United States may obtain a birth certificate by writing the division of vital statistics of the State Health Department in the proper state. Exceptions to this are the cities of Baltimore, Boston, New York, and the District of Columbia which keep the original records in the Municipal Bureau of Vital Statistics. Massachusetts is also an exception in that its Division of Vital Statistics is part of its Department of State.

2214.113 Inadequate or Inconsistent Information on Birth Certificates

A birth certificate will sometimes fail to show the given name of the applicant or will show an entirely different name. In these instances, the agency shall make every effort to clear up the inadequacy or inconsistency through other sources of evidence. If the inadequacy of the original certificate cannot be conclusively resolved, the agency shall weigh all available evidence and decide whether or not the certificate corroborates the age of the applicant. All the determining factors entering into the decision shall be recorded in detail in the case record.

2214.114 Corrections to Birth Certificate

Birth certificates which may have been changed in accordance with Chapter 174, New Jersey Laws of 1938, shall be carefully evaluated. This regulation provides that corrections to birth and marriage certificates may be made "by the person who made the original report ... or by any other person having personal knowledge of the matters sought to be corrected which other person shall state such matters on his oath."

2214.114 - 2214.13

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2214.114 (cont'd) The New Jersey Bureau of Public Health Statistics incorporates in its transcription both the original and corrected records, together with the name of the person making such a correction. A corrected record shall not be accepted as conclusive proof of age without additional substantiating evidence.

When municipal records cannot be examined personally, a copy of both the original and corrected records shall be requested.

2214.115 Records of Delayed or Unrecorded Births

Chapter 21, New Jersey Laws of 1942, provides that unrecorded births may be recorded "by any person who has definite knowledge of the facts concerning the birth or by the person whose birth is being recorded, provided substantiating documentary proof is submitted and noted upon the certificate by the person before whom the affidavit is taken." An applicant is able in this way to record his birth upon submitting substantiating documentary proof.

In requesting birth certificates from the Bureau of Public Health Statistics, the agency shall request the date when the certificate was filed. The agency shall seek additional evidence if the filing date of the birth certificate is less than three years before the time of application.

2214.12 Birth Certificate or Death Record of Another Person

The birth certificate or death record of a person other than the applicant may indirectly help in determining the applicant's age. For example, the birth certificate of a child generally shows the age of the parent and is considered adequate evidence of the age of both the parent and child. Even if the parent's age is not given, it may be assumed that he was not less than 15 years old at the time of the birth of the first child. Other information given by the applicant in conjunction with these data may help to determine that he is even older than shown by the document submitted.

Similarly, the death record of a child which gives the child's age at the time of death may enable the agency to determine the applicant's age.

2214.13 Marriage Certificates

The ages of the contracting parties and the date of marriage will be presented in an authenticated marriage certificate. Information from these records are available in the same way as original birth records. Consideration may have to be given to the fact that certain persons understate or overstate age at the time of marriage due to the difference in the ages of the couple.

2214.2 - 2214.33

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2214.2 CHURCH RECORDS

Evidence of age may be secured from various church records, such as baptismal, membership, First Communion, Confirmation, marriage, and the like.

2214.21 Baptismal Records

An original baptismal certificate or transcript of church records duly certified by the custodian of such records is usually acceptable as conclusive evidence of age.

2214.3 RECORDS OF FOREIGN BORN APPLICANTS

Foreign born applicants may have their age determined through records which resulted from their immigration, such as passports, immigration records, naturalization records, etc.

2214.31 Passports

An applicant may have in his possession a passport which shows his age. If the passport is unavailable, inquiry may be made regarding the applicant's application for a passport to the United States Department of State, Washington, D. C.

2214.32 Immigration Records

Before July 1, 1924, each immigrant was required to declare his age when he entered this country. Since that date, each immigrant must support his declared date of birth with documentary proof.

Information regarding immigration records is usually available from the Immigration and Naturalization Service in the district of entry. The United States Department of Labor at Washington, D.C., may be used also to locate immigration records. Requests for this information shall include the following data:

- a. The exact spelling of the immigrant's name as used at the time of arrival in this country,
- b. The date and port of entry,
- c. The name of the ship, and
- d. Any other available identifying information.

2214.33 Applications for Citizenship

Age may frequently be determined through documents issued in connection with applications for citizenship. Papers covering declaration of intention to become a naturalized citizen may state the person's age at the time of declaration. When no age is given, the person can be considered as having been at least 18 years old at the time of declaration.

2214.34-2214.51

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2214.34 Naturalization Papers

Naturalization papers usually give the age of the naturalized person. Even if no age is given, the person can be considered to have been at least 21 years of age at the time of naturalization unless he derived his citizenship through the naturalization of someone else. For example, naturalization papers issued for a parent frequently list the names and ages of the children under 21 at the time.

If naturalization papers are unavailable, the proper court of naturalization shall be contacted for information.

At times the United States Department of Labor at Washington, D.C., will be able to furnish naturalization records. A request for such material shall include the following information:

- The name of the person as spelled at the time of naturalization,
- The location of the court issuing the naturalization certificate, and
- The date of naturalization.

2214.4 CENSUS RECORDS, FEDERAL AND STATE

2214.41 Federal Census Records

Evidence of age may be secured from federal census records only after other evidence is not available from state and local records. Requests for information are to be filed with the Bureau of the Census, Department of Commerce, Washington, D.C., on the form furnished for this purpose, with all pertinent identifying information, such as the applicant's address at the time of the census.

The fee charged for each search of the federal census records is a proper administrative cost.

2214.42 State Census Records

Evidence of age may be secured from the census records of New Jersey taken on a state-wide basis during 1905 and 1915. The state census records show the age and name of every member of the families enumerated. In requesting information from the New Jersey State Library, Trenton, where census records are kept, it is essential that the address of the applicant at the time of the census be given.

2214.5 OTHER DOCUMENTARY SOURCES

2214.51 School Records

Evidence of age may be secured from school records in which the applicant's age or years of attendance are given.

2214.52 - 2214.533

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2214.52 MILITARY SERVICE RECORDS, FEDERAL AND STATE

Government records of enlistment with and discharge from the armed forces ordinarily state the age of the person who has experienced military service.

2214.521 Federal Military Service Records

An applicant who served with the armed forces of the United States may have in his possession certain records of his military service which present evidence of age. If these records are not available, then the United States Department of Defense shall be contacted for information.

In requesting information from this source, the following information should be given as a minimum:

- The full name of the person,
- The dates of service, i.e., enlistment and discharge,
- The places of enlistment and discharge,
- Organization and rank, and
- The approximate date and place of birth.

2214.522 State Military Service Records

An applicant who served with the State Militia or the National Guard will also have certain records of his local military service. If these are not available, then the office of the State Adjutant-General, Department of Defense, Trenton, shall be contacted.

2214.53 COURT RECORDS

Evidence of age may be secured from various records maintained by different county, state, or federal courts of law. Some examples of court records are legal commitments, adoption records, divorce records, etc.

2214.531 Legal Commitments

Records of legal commitments of the mentally ill or delinquent maintained by the county courts in New Jersey will present the applicant's age.

2214.532 Adoption Records

An applicant who was adopted before his twenty-first birthday may obtain evidence of his age from the adoption decree granted through the proper County Court.

2214.533 Divorce Records

Records of divorce or legal separation indicate the age of the applicant at the time of the event. Requests for information on divorces may be made to the Clerk, Superior Court, State House, Trenton, N. J.

2214.533 - 2214.544

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2214.533 (cont'd) Any discrepancy in the name of the applicant as shown in such records should be cleared up through other sources of evidence.

2214.54 EMPLOYMENT RECORDS

Records resulting directly or indirectly from employment, such as records maintained by employers, labor unions, the Federal Security Agency, etc., may give evidence of age.

2214.541 Employment Records in Private Industry

Employment records maintained by former employers in private industry may show the age of the applicant at the time of his employment.

In weighing evidence from this source, consideration shall be given to the common tendency of persons to state age incorrectly in order to secure employment in that older persons misrepresent themselves as younger while younger persons misrepresent themselves as older.

2214.542 Civil Service Records, Federal and State

a. Federal Civil Service Records

Federal civil service records generally show the age of the applicant before and during the time of his employment. Such records are kept for a comparatively short time by the United States Civil Service Commission, Washington, D. C. It may also be helpful to contact the United States Pension Board.

b. State Civil Service Records

State civil service records will similarly show the age of the applicant. Such records are available at the New Jersey Civil Service Department, Trenton.

2214.543 Labor Union Records

Records on file with a labor union such as the American Federation of Labor or the Congress for Industrial Organization will show the age of the applicant at the time of his admission to membership.

2214.544 Social Security Records - Old Age and Survivors Insurance

In order to secure employment in covered industry, the working individual must have his age recorded by the Federal Security Agency in respect to Old Age and Survivors Insurance. In using this source, the agency shall submit a request for information on revised Form OA-20 in triplicate to the local field office of the Social Security Agency serving the area in which the applicant lives.

2214.55 - 2214.612

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2214.55 RECORDS OF PUBLIC AND PRIVATE WELFARE AGENCIES

Records kept by public and private welfare agencies will generally show the age of the applicant at the time of agency contact.

Any record which may have been made in anticipation of referral to public assistance shall be carefully examined.

2214.56 TOWN AND COUNTY HISTORIES AND GENEALOGIES

Histories and genealogies maintained by some communities and counties are sources of evidence of age.

2214.57 VOTING RECORDS

Enrollment or registration records of voting districts will generally show the age of the applicant. However, the fact that age is not always stated correctly at the time of enrollment shall be considered.

2214.58 BANK AND POSTAL SAVINGS RECORDS

Evidence on age may be secured from bank and postal savings records where the applicant may have been required to give his age as a means of identification when he opened his account.

2214.59 FRATERNAL ORGANIZATION RECORDS

Records of fraternal organizations may present the age of members at the time of admission to membership. Such records are often maintained by the local chapters of the fraternal organizations.

2214.6 RECORDS OF HOSPITALS, CLINICS, AND INSTITUTIONS

2214.61 Medical Records of Hospitals, Clinics and Institutions

2214.611 Hospital Records of Birth

An authenticated hospital record of birth is acceptable as conclusive evidence of age.

2214.612 Other Medical Records of Hospitals, etc.

Other medical records of hospitals, clinics and medical institutions will generally show the age of the applicant at the time of his admission for emergency or continued care. However, the fact that the applicant himself may not have given the information must be considered.

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2214.62 Records of Non-Medical Institutions

Records maintained by such non-medical institutions as welfare houses, almshouses, orphanages, jails, prisons, reformatories, etc., will generally show the applicant's age at the time of his admission.

2214.7 PHYSICIANS' AND MIDWIVES' RECORDS

Frequently, the records of the family physician and/or midwife who were in attendance at the time of birth will provide the date of birth and the name of the applicant.

Other records of physicians such as patient file records will provide additional evidence of age. However, the value of the evidence presented in these records depends upon the age of the record.

2214.8 PERSONAL RECORDS

The applicant may have any number of the above sources of evidence in his possession or readily accessible to him. In addition, he may have other sources of evidence of which he is the sole possessor, such as the Family Bible, other family records, insurance policies, licenses of various sorts, award letters, etc.

It is recommended that personal records submitted by the applicant or by another person in his behalf be returned to the owner after they have served their purpose.

2214.81 Family Bible

Evidence of age may be obtained from the applicant's Family Bible in which successive entries of birth have been made. The reliability of these entries is open to question if they appear to be of recent origin or to have been tampered with. Their reliability is increased if the particular entry for the applicant and the Bible can be determined to be of considerable age or when the information on the applicant appears in chronological order of the entries on other family members.

2214.82 Other Family Records

Other family records which may furnish evidence of age include birthday books, old diaries, old letters, embroidered samplers, family pictures with dates and ages, prizes with dates and ages, dated newspaper clippings, and the like.

2214.83 Insurance Records

Current, lapsed, cash-surrendered, or paid-up insurance policies in the applicant's possession will show his age at the time of issuance.

2214.83 - 2215

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2214.83 In evaluating the evidence secured from insurance records, it shall be kept (cont'd) in mind that people frequently understate their age for insurance purposes.

2214.84 Licenses of Various Sorts

Licenses of various sorts, such as fishing, hunting, boating, driving, vending, professional, and the like will generally present evidence of age.

2214.85 Award Letters

The applicant's letter of award for Old Age and Survivors Insurance Benefits from the Federal Security Agency is acceptable evidence that the person is past 65 years of age.

Award letters by other federal agencies such as the United States Veterans Administration may also include information on the applicant's age.

2214.9 AFFIDAVITS

Evidence of age presented in affidavit form by reliable and disinterested persons are considered the least desirable source of evidence. Affidavits may be used, however, when efforts to secure evidence from other sources have failed or have produced inconclusive data. In these instances, affidavits shall be taken under oath from a person who has objective, factual knowledge of the applicant's age. The affidavit shall show the circumstances under which the affiant has known the applicant and the factual basis for his statements in regard to the applicant's age. It is essential that the affidavit indicate more than mere opinion.

2214.91 Example of Valid Affidavit

The following example indicates the nature of a valid affidavit:

The affiant states that he believes the applicant to be over 65 years of age since he (the affiant) himself, now aged 50, was married in 1927 at the age of 25 at the applicant's home, and his best man, also 25, was the youngest of the applicant's three sons.

(Cross References: 2200.2 Sources of Evidence
through
2200.22 Non-Documentary Evidence)

2215 AGE AT TIME OF APPLICATION

The person who believes that he is eligible or who wants to have his eligibility considered has the right to apply for public assistance at any time. However, an application for OAA or DA may be denied on the basis of age if it is filed more than 60 days before the require age is attained.

2215.1 - 2216.2

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2215.1 Old Age Assistance

If an individual files an application for OAA more than 60 days before his sixty-fifth birthday, his application may be denied. On the other hand, an individual may file an application for OAA within 60 days before his sixty-fifth birthday and be approved for assistance if otherwise eligible.

However, no OAA payment shall be issued until the person has attained his sixty-fifth birthday.

2215.2 Disability Assistance

The application of an individual who files for DA more than 60 days before his eighteenth birthday may be similarly denied. On the other hand, an individual may file an application for DA within 60 days of his eighteenth birthday and be approved for assistance if otherwise eligible. It is recommended, however, that an individual who is within 60 days of his sixty-fifth birthday be encouraged to apply for OAA rather than DA.

No DA payment shall be issued to any applicant before his eighteenth birthday nor after his sixty-fifth birthday.

2215.3 General Assistance

An individual may file an application for GA at any time and receive payment if eligible, regardless of his age.

2216 CLIENT'S AGE AND INITIAL ELIGIBILITY FOR ANOTHER PROGRAM

The age of a GA or DA client who receives assistance over a period of years shall be considered in relation to his eligibility for another program.

2216.1 DA Client on Attaining Age 65

A DA client who has attained the age of 65 is no longer eligible for DA.

Therefore, he shall be given an opportunity to apply for OAA sufficiently in advance of his sixty-fifth birthday so that his OAA application can be completed in time to permit uninterrupted payments of assistance.

2216.2 GA Client on Attaining Age 65

When it appears from available information that a GA client has attained or is about to attain the age of 65, he shall be advised to apply for OAA. If he fails to apply for OAA, he shall no longer be eligible for GA.

If he applies for OAA, he shall continue to receive GA until he is found eligible for OAA at which time his GA payments shall cease. In the event

2216.2 - 2217

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2216.2 (cont'd) that he is found ineligible for OAA because of a technical reason, such as age, residence, etc., but is still in need of assistance he shall be eligible to continue to receive GA.

2216.21 Disabled GA Client on Attaining Age 18

When it appears from available information that a disabled GA client has attained or is about to attain the age of 18, he shall be advised to apply for DA. If he fails to apply for DA, he shall no longer be eligible for GA.

If he applies for DA, he shall continue to receive GA until he is found eligible for DA at which time his GA payments shall cease. In the event that he is found ineligible for DA because of a technical reason, such as age, residence, factor of permanent and total disability, etc., but is still in need of assistance, he shall be eligible to continue to receive GA.

(Cross References: 2215 Age at Time of Application
through
2215.3 General Assistance)

2217 PROCEDURAL CONTROLS FOR IDENTIFYING AGE

The agency shall establish and maintain proper administrative controls relating to the age of recipients in order to accomplish the procedures required by Items 2216.1, 2216.2 and 2216.21.

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2880-2889	General - Social Service Exchanges 10/22/52

2880 PRELIMINARY STATEMENT

At present, numerous confidential exchanges called either social service exchanges or central indexes are serving the various health and welfare agencies of New Jersey.

While it is recognized that the applicant and/or recipient is the primary source of information, the confidential exchange is also recognized by the Bureau of Assistance as a community resource which may be utilized by the agency to supplement or clarify the information received from the individual or to provide other cooperating agencies with pertinent information.

2881 DEFINITION OF SOCIAL SERVICE EXCHANGE

The social service exchange or central index is that community resource which maintains a confidential registry or index of social case records of member agencies. It enables agencies to exchange information and to develop cooperative services.

2881.1 Purpose of Social Service Exchange

Since its inception during the 1870's, the social service exchange has had as its general purpose service to other social agencies in order that they might coordinate their social work resources more effectively, and also avoid confusion and duplication of service in working with a particular individual and/or his family unit.

These purposes are realized through the maintenance of a central file in which are registered the names, addresses, and certain other identifying information of individuals and/or families known to social agencies that are members of the exchange. One of the chief functions of the exchange is to report the presence or absence of a case record to an inquiring member agency.

2882 STANDARDS FOR SOCIAL SERVICE EXCHANGE

Before becoming a member of a social service exchange, the agency shall determine whether the exchange will be useful to it.

An exchange, to be useful to the agency, must:

- a. Operate under the standards of efficiency, ethics, and the like established by the Association of Social Service Exchanges of New Jersey;
- b. Operate at least throughout the county; and
- c. Have the majority of significant health and welfare agencies as actively participating members.

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RESPONSIBILITIES OF MEMBER AGENCIES

As soon as an agency becomes a member agency of a social service exchange, it enters into a relationship in which it must assume definite responsibilities. Among these are:

- a. To develop, put in writing, and use policy and procedure relative to the exchange. Such policy and procedure shall specify:
 1. The type of case it expects to register;
 2. When it will register a case;
 3. The general plan of follow-up, reregistration, cancellation, and protection of information; and
 4. The policy toward inter-agency relationships.
- b. To take an active interest in the policy and management of the exchange.

Agencies generally contact the exchange when they have questions or complaints about specific registration problems, such as delayed or inaccurate reports. While these discussions are important, even more important are the discussions with the exchange on matters of general policy.

- c. To register consistently and promptly in accordance with the policy and procedure established by the agency.
- d. To give as complete information as required.
- e. To respect the confidentiality of information secured from other agencies.
- f. To ensure that staff members understand the function of the exchange, and the policy and procedure of the agency on the use of the exchange.

2884

PROCEDURE ON USE OF SOCIAL SERVICE EXCHANGE

The agency shall establish procedures on:

2884.1

Selecting Cases for Registration

The agency shall be selective in registering cases with the exchange to the extent of registering only those cases for which an application form has been prepared.

2884.2

Timing Registrations

Cases shall be registered at the point that an investigation is undertaken.

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2884.3 Providing Additional Data

The agency shall have a plan for providing the exchange with additional identifying information on currently registered cases. Data on change of address are especially important.

2884.4 Reregistering Active Cases

Active cases shall be reregistered for continuous notification service in accordance with the plan provided by a particular exchange. Generally, a definite period of time, such as two years, must be considered in reregistering cases.

2884.5 Cancelling Registrations

Cases which have been registered with an exchange shall be cancelled:

- When case records have been destroyed or otherwise have become unavailable.
- When the agency record does not contain sufficient data to be of value to another agency.

2884.51 Recommendations

The fact that a case has been inactive any given number of years should not be the sole basis for cancellation. Dates shall be considered in relation to the content of the record.

Cancellation of useless registrations is essential to both the exchange and the agency because it prevents the expensive accumulation of unnecessary exchange records and because it saves time in replying to inquiries on which no significant information is available.

Case records should be reviewed for cancellation on receipt of a request from another agency for information and at the point of closing.

2885 SECURING INFORMATION FROM OTHER AGENCIES

It is expected that the agency will contact the agencies registered on a case when it is considered that the information may be directly related to its responsibility for the case.

The agency shall clearly indicate what it wants to know about the case registered by another agency, and why the information is important. This makes it possible for the agency contacted to select pertinent information. It also helps agencies to interpret and clarify their respective functions.

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2885.1 Methods for Follow-Up of Registrations

These methods are used to follow-up registrations:

- a. Telephone communication. This method may be used when essential information is needed at once.
- b. Written requests for information. This method is preferable because the requests become an authentic part of the case record.
- c. Inter-agency conference. This may be the best method when extensive cooperative planning between agencies is required.

2886 REPORTING TO INQUIRING AGENCIES

The agency shall operate within certain specifications on the release of confidential information to inquiring agencies.

[Cross Reference: 2820* Safeguarding Information]

2887 PASSING ON INFORMATION

It is accepted practice that no agency passes on information received from another agency to a third agency. It is assumed that member agencies of the social service exchanges used by public assistance agencies will follow this practice.

2888 FILING SOCIAL SERVICE CLEARANCE OR NOTIFICATION SLIPS

Social service clearance and/or notification slips returned to the agency from the exchange shall be filed in each case record.

2889 RECORD OF REGISTRATIONS

The agency shall keep a record of the number of registrations as a basis for auditing and approving bills submitted by the exchange.

[Cross Reference: