



3 September 2025

Tēnā koe

Official Information Act request

Thank you for your email of 7 August 2025, requesting information about the Unsupported Child's Benefit.

I have considered your request under the Official Information Act 1982 (the Act). Please find my decision on each part of your request set out separately below.

- 1. A copy or copies of the legislation - laws and regulations - relevant to the Unsupported Child Benefit.*
- 2. A copy or copies of the policies, procedures, rules, guidelines, etc. - all non-laws and non-regulations requested above in other words - relevant to the Unsupported Child Benefit.*

The Unsupported Child's Benefit (UCB) is administered by the Ministry of Social Development (the Ministry) in accordance with the Social Security Act 2018. Other legislation relevant to UCB includes the Social Security Regulations 2018 and Orphan's and Unsupported Child's Benefit (Additional Assistance) Programme. For further information, please see:

- Subpart 6 of the Social Security Act 2018:
www.legislation.govt.nz/act/public/2018/0032/latest/LMS5958.html.
- The Social Security Regulations 2018:
www.legislation.govt.nz/regulation/public/2018/0202/latest/LMS96210.html.
- Orphan's and Unsupported Child's Benefit (Additional Assistance) Programme: www.workandincome.govt.nz/map/legislation/welfare-programmes/orphans-and-ucb-additional-assistance-programme/orphan-s-and-unsupported-child-s-benefit-additiona.html.

The guidance relevant to the administration of UCB is in Map, which is publicly available through the Work and Income website. The relevant legislation is referenced at the bottom of each Map page. Please see here: www.workandincome.govt.nz/products/a-z-benefits/unsupported-childs-benefit.html.

The UCB index page can be expanded to show all the pages within the UCB manual and can be found here: www.workandincome.govt.nz/map/income-support/main-benefits/orphans-benefit-and-unsupported-childs-benefit/index.html.

Information about additional assistance specifically available to UCB carers can be found here: www.workandincome.govt.nz/map/income-support/extra-help/orphans-benefit-and-unsupported-childs-benefit-products/index.html.

I have also attached the Case Manager guidelines for interviews for UCB, information and processes for Orphan's Benefit (OB) and UCB, and the Work and Income procedures for OB and UCB. This information is found on the Ministry's internal intranet. Some of the information in the Case Manager guidelines is considered out of scope of your request.

3. *A copy or copies of the processes that must be used to evaluate and approve or decline a second Unsupported Child Benefit application when the first Unsupported Child Benefit application was approved and payments made for more than 2 years, and the child left the applicant's home but returned more than 1 year later causing a stoppage of the payments to be requested by the applicant then a second application to be made and submitted to WINZ ... with all of the original application personal and other information remaining unchanged in the interim period other than the child's age. (What I am needing here is a copy or copies of a directive or other sort of instruction to WINZ staff how they are required to process a second Unsupported Child Benefit application when they already have all of the relevant information on record from a first Unsupported Child Benefit application).*

The Ministry has a duty to investigate and decide all applications made where it has the relevant information to do so. To apply for a benefit, clients are required to make an application and provide the information necessary for the Ministry to investigate and determine entitlement. This applies to all benefit applications, including when a client may have previously been in receipt of assistance.

More information about an application for a benefit can be found here: www.workandincome.govt.nz/map/income-support/core-policy/requests-for-financial-assistance/application-for-benefit/guidelines-application-for-benefit.html.

I will be publishing this decision letter, with your personal details deleted, on the Ministry's website in due course.

If you wish to discuss this response with us, please feel free to contact OIA_Requests@msd.govt.nz.

If you are not satisfied with my decision on your request, you have the right to seek an investigation and review by the Ombudsman. Information about how to make a complaint is available at www.ombudsman.parliament.nz or 0800 802 602.

Ngā mihi nui

pp.

A handwritten signature in black ink, appearing to read 'Anna Graham', written over a light blue horizontal line.

Anna Graham
General Manager
Ministerial and Executive Services

Orphan's Benefit and Unsupported Child's Benefit procedures for Work and Income

This page provides you with information about Orphan's Benefit (OB) and Unsupported Child's Benefit (UCB) and links to the Work and Income procedures

On this Page:

Overview

To receive **UCB**, the caregiver must not be the child's natural parent, adoptive parent or step-parent and because of a family breakdown there is no natural parent, adoptive parent or step-parent to care for the child.

For **OB** the child's parents must either be deceased, cannot be found or they suffer from a serious long-term illness or incapacity, which makes them unable to care for their child.

The links below provide you with more in depth information about the processes for managing OB/UCB applications, client/child change in circumstances and reviews.

Latest Update

1 July 2021 changes

From 1 July 2021, the 12 month eligibility rule is being removed. This means that clients may be able to access OB/UCB for care arrangements that are less than 12 months. Please click [here](https://doogie.ssi.govt.nz/community/display/HIYA/Orphan%27s+Benefit+and+Unsupported+Child%27s+benefit) [https://doogie.ssi.govt.nz/community/display/HIYA/Orphan%27s+Benefit+and+Unsupported+Child%27s+benefit] for more information.

Applications

OB and UCB provides non-taxable income support to the caregiver of a child whose parents can't support them.

[Qualifications](http://doogie/map/income-support/main-benefits/orphans-benefit-and-unsupported-childs-benefit/qualifications.html) [http://doogie/map/income-support/main-benefits/orphans-benefit-and-unsupported-childs-benefit/qualifications.html]

[Obligations](http://doogie/map/income-support/main-benefits/orphans-benefit-and-unsupported-childs-benefit/obligations.html) [http://doogie/map/income-support/main-benefits/orphans-benefit-and-unsupported-childs-benefit/obligations.html]

[Multiple Children](http://doogie/map/income-support/main-benefits/orphans-benefit-and-unsupported-childs-benefit/multiple-children-01.html) [http://doogie/map/income-support/main-benefits/orphans-benefit-and-unsupported-childs-benefit/multiple-children-01.html]

[Child Support](http://doogie/map/income-support/main-benefits/orphans-benefit-and-unsupported-childs-benefit/child-support-01.html) [http://doogie/map/income-support/main-benefits/orphans-benefit-and-unsupported-childs-benefit/child-support-01.html]

[Child Support process](https://doogie.ssi.govt.nz/resources/helping-clients/procedures-manuals/work-and-income/core-procedures/child-support/info-share-child-support/child-support-pass-on.html) [https://doogie.ssi.govt.nz/resources/helping-clients/procedures-manuals/work-and-income/core-procedures/child-support/info-share-child-support/child-support-pass-on.html]

[Commencement Date](http://doogie/map/income-support/main-benefits/orphans-benefit-and-unsupported-childs-benefit/commencement-date.html) [http://doogie/map/income-support/main-benefits/orphans-benefit-and-unsupported-childs-benefit/commencement-date.html]

[Rate of Payment](http://doogie/map/deskfile/main-benefits-rates/orphans-benefit-and-unsupported-childs-benefit-cur.html) [http://doogie/map/deskfile/main-benefits-rates/orphans-benefit-and-unsupported-childs-benefit-cur.html]

[Payment and Redirection of Benefit](http://doogie/map/income-support/main-benefits/orphans-benefit-and-unsupported-childs-benefit/payment.html) [http://doogie/map/income-support/main-benefits/orphans-benefit-and-unsupported-childs-benefit/payment.html]

[When to pay UCB where there is an Oranga Tamariki Order in place](http://doogie/map/income-support/main-benefits/orphans-benefit-and-unsupported-childs-benefit/oranga-tamariki-order-in-place.html) [http://doogie/map/income-support/main-benefits/orphans-benefit-and-unsupported-childs-benefit/oranga-tamariki-order-in-place.html]

Single clients applying for OB or UCB

A single client who applies for or is receiving Jobseeker Support and is also caring for a child who is aged under 14 years who meets the qualifications to receive OB or UCB must meet the qualifications for Jobseeker Support in order to receive this benefit.

[Single and Caring for an OB or UCB child](http://doogie/map/income-support/main-benefits/jobseeker-support/single-and-caring-for-an-orphans-or-unsupported-ch-01.html) [http://doogie/map/income-support/main-benefits/jobseeker-support/single-and-caring-for-an-orphans-or-unsupported-ch-01.html]

Case Manager Interview Guidelines

All applications for UCB must include a [case manager interview \[http://doogie/resources/helping-clients/procedures-manuals/work-and-income/main-benefits/ob-ucb/unsupported-childs-benefit-interview-guidelines.html\]](http://doogie/resources/helping-clients/procedures-manuals/work-and-income/main-benefits/ob-ucb/unsupported-childs-benefit-interview-guidelines.html), with the caregiver to help determine a family breakdown.

Clothing Allowance

The Clothing Allowance provides weekly financial help to people getting of Orphan's Benefit or Unsupported Child's Benefit. The Clothing Allowance is non-taxable and paid at the same rate as clothing allowance for children in care. This payment grants automatically when OB or UCB is granted.

Family Breakdown – UCB

All UCB applications require evidence of the breakdown in the child's family. Evidence could be documentation from Oranga Tamariki or another authorised agency. In all other circumstances the caregiver must be referred to an Independent Assessment Provider for a family breakdown assessment.

[Breakdown in child's family \[http://doogie/map/income-support/main-benefits/orphans-benefit-and-unsupported-childs-benefit/breakdown-in-the-childs-family.html\]](http://doogie/map/income-support/main-benefits/orphans-benefit-and-unsupported-childs-benefit/breakdown-in-the-childs-family.html)

[Oranga Tamariki documentation \[http://doogie/map/income-support/main-benefits/orphans-benefit-and-unsupported-childs-benefit/oranga-tamariki-documentation.html\]](http://doogie/map/income-support/main-benefits/orphans-benefit-and-unsupported-childs-benefit/oranga-tamariki-documentation.html)

[Care and Protection \[http://doogie/map/income-support/main-benefits/orphans-benefit-and-unsupported-childs-benefit/care-and-protection-issues-01.html\]](http://doogie/map/income-support/main-benefits/orphans-benefit-and-unsupported-childs-benefit/care-and-protection-issues-01.html)

[Family Violence Intervention Programme \[http://doogie/resources/helping-clients/products-services/work-and-income/family-violence-intervention/index.html\]](http://doogie/resources/helping-clients/products-services/work-and-income/family-violence-intervention/index.html)

[Integrated Service Response \[http://doogie/resources/helping-clients/products-services/work-and-income/integrated-service-response/\]](http://doogie/resources/helping-clients/products-services/work-and-income/integrated-service-response/)

[Independent Assessment Provider referral process \[http://doogie/resources/helping-clients/procedures-manuals/work-and-income/main-benefits/ob-ucb/independent-assessment-provider-ucb-14-only.html\]](http://doogie/resources/helping-clients/procedures-manuals/work-and-income/main-benefits/ob-ucb/independent-assessment-provider-ucb-14-only.html)

[UCB independent provider scenarios \(PDF 84.23KB\) \[http://doogie/documents/resources/helping-clients/procedures-manuals/work-and-income/main-benefits/ob-ucb/ucb-independent-provider-scenarios.pdf\]](http://doogie/documents/resources/helping-clients/procedures-manuals/work-and-income/main-benefits/ob-ucb/ucb-independent-provider-scenarios.pdf)

Family Reconciliation Counselling

Work and Income can pay for up to a maximum of 6 FRC sessions where the Independent Assessment Provider has made this recommendation.

[Family Reconciliation Counselling \(UCB\) Referral Procoess \[http://doogie/resources/helping-clients/procedures-manuals/work-and-income/main-benefits/ob-ucb/family-reconciliation-counselling-ucb-referral-process.html\]](http://doogie/resources/helping-clients/procedures-manuals/work-and-income/main-benefits/ob-ucb/family-reconciliation-counselling-ucb-referral-process.html)

School Start-up Payment

From 13 January 2014, School and Year Start-Up Payment (SAYSUP) were made available for people who care for a child whose parents are unable to do so (i.e. caregivers receiving OB and/or UCB). SAYSUP provides non-taxable, non-recoverable financial assistance to assist with various school related costs or other costs relating to the care of the child.

An annual SAYSUP, ranging from \$400 for children under five to \$550 for children 14 years and over, is available to caregivers in receipt of UCB or OB. This recognises that there are large regular costs that fall near the beginning of the school year, such as uniforms, school fees, and sports clubs memberships. SAYSUP is either paid automatically or processed by Centralised Services. Case managers should not be granting these payments.

[SAYSUP Process \[http://doogie/resources/helping-clients/procedures-manuals/work-and-income/main-benefits/ob-ucb/how-to-process-the-school-and-year-start-up-payment-granting-or-declining.html\]](http://doogie/resources/helping-clients/procedures-manuals/work-and-income/main-benefits/ob-ucb/how-to-process-the-school-and-year-start-up-payment-granting-or-declining.html)

[SAYSUP Payment rates \[https://doogie.ssi.govt.nz/map/deskfile/extra-help-information/orphans-benefit-and-unsupported-childs-benefit-tables/school-and-year-start-up-payment-current-01.html\]](https://doogie.ssi.govt.nz/map/deskfile/extra-help-information/orphans-benefit-and-unsupported-childs-benefit-tables/school-and-year-start-up-payment-current-01.html)

Establishment Grant

A non-taxable, non-recoverable one-off payment of \$350 per child, which is made to carers who are granted OB or UCB for a child. The caregiver, or their spouse or partner can only ever receive the Establishment Grant once for each UCB or OB child. The Establishment Grant payment is made when UCB or OB has been granted

[Establishment Grant Introduction \[http://doogie/map/income-support/main-benefits/orphans-benefit-and-unsupported-childs-benefit/establishment-grant.html\]](http://doogie/map/income-support/main-benefits/orphans-benefit-and-unsupported-childs-benefit/establishment-grant.html)

[Establishment Grant Payment rates \[https://doogie.ssi.govt.nz/map/deskfile/extra-help-information/orphans-benefit-and-unsupported-childs-benefit-tables/establishment-grant-rate.html\]](https://doogie.ssi.govt.nz/map/deskfile/extra-help-information/orphans-benefit-and-unsupported-childs-benefit-tables/establishment-grant-rate.html)

[Establishment Grant process \[http://doogle/resources/helping-clients/procedures-manuals/work-and-income/main-benefits/ob-ucb/establishment-grant.html\]](http://doogle/resources/helping-clients/procedures-manuals/work-and-income/main-benefits/ob-ucb/establishment-grant.html)

Extraordinary Care Fund

The Extraordinary Care Fund can help client's in receipt of the UCB or OB cover additional costs associated with children who are showing promise in a particular area or experiencing difficulty that is significantly impacting on their development.

This page provides an overview of the [Extraordinary Care Fund \[http://doogle/resources/helping-clients/procedures-manuals/work-and-income/main-benefits/ob-ucb/extraordinary-care-fund.html\]](http://doogle/resources/helping-clients/procedures-manuals/work-and-income/main-benefits/ob-ucb/extraordinary-care-fund.html), its purpose and the process for staff to follow when a client submits an application.

Permanent Care (know as Home for Life) processes

Permanent care, or Home for Life as it's known, involves a legal process to appoint a child's permanent caregiver through the Family Court. Where Oranga Tamariki has had care, custody or sole guardianship of a child but the child is now in the legal custody of a foster carer, they are considered to be in a permanent placement. This is referred to as a Home for life.

The links below provide you with information about the process to follow when clients have been granted parenting or guardianship orders, what supporting documents required and when UCB can be paid and when it can't, depending on the type of order that is in place and section of [Oranga Tamariki Act 1989 \[http://doogle/map/definitions/oranga-tamariki-act-1989.html\]](http://doogle/map/definitions/oranga-tamariki-act-1989.html) that applies.

[Permanent Care \(Home for Life\) : discussions and application \[http://doogle/resources/helping-clients/procedures-manuals/work-and-income/main-benefits/ob-ucb/home-for-life.html\]](http://doogle/resources/helping-clients/procedures-manuals/work-and-income/main-benefits/ob-ucb/home-for-life.html)

[Child Discharged \[http://doogle/map/income-support/main-benefits/orphans-benefit-and-unsupported-childs-benefit/oranga-tamariki-child-discharged-to-caregiver.html\]](http://doogle/map/income-support/main-benefits/orphans-benefit-and-unsupported-childs-benefit/oranga-tamariki-child-discharged-to-caregiver.html)

[Caregiver Order in Place \[http://doogle/map/income-support/main-benefits/orphans-benefit-and-unsupported-childs-benefit/oranga-tamariki-order-in-place.html\]](http://doogle/map/income-support/main-benefits/orphans-benefit-and-unsupported-childs-benefit/oranga-tamariki-order-in-place.html)

Changes and Reviews

Caregivers are obliged to advise any changes in theirs and/or child circumstances that may affect their entitlement UCB or OB. You may also review a benefit at any time to ensure that the client still meets the qualifications and is receiving the correct rate of payment. Change to a dependent child's circumstances is generally going to affect the OB/ UCB payment

[Change in client circumstances \[http://doogle/map/income-support/main-benefits/jobseeker-support/changes-and-reviews-jobseeker-support/changes-and-reviews.html\]](http://doogle/map/income-support/main-benefits/jobseeker-support/changes-and-reviews-jobseeker-support/changes-and-reviews.html)

[Child Change in Circumstances \[http://doogle/map/income-support/main-benefits/orphans-benefit-and-unsupported-childs-benefit/changes-and-reviews-ob-and-ucb/child-changes-01.html\]](http://doogle/map/income-support/main-benefits/orphans-benefit-and-unsupported-childs-benefit/changes-and-reviews-ob-and-ucb/child-changes-01.html)

Extra Help - OB/UCB caregiver applies for an advance or Special Needs Grant (SNG)

The caregiver who is receiving the OB or UCB may apply for an advance or a Special Needs Grant for items needed for the child or children in their care. This page contains [Helpline tips \[http://doogle/resources/helping-clients/helplines-tips/work-and-income/miscellaneous/caregiver-of-ucbob-applies-for-an-advance-or-sng.html\]](http://doogle/resources/helping-clients/helplines-tips/work-and-income/miscellaneous/caregiver-of-ucbob-applies-for-an-advance-or-sng.html) information for processing applications from a UCB/OB caregiver

Young Parent Payment (YPP) clients

All Young Parent Payment (YPP) clients applying for UCB are managed by a service provider or specialist case worker. If a YPP client makes contact with a contact centre or service centre they must be referred to their provider. The following link provides you with further information on Youth Service Support Unit (YSSU) process for Young Parent Payment (YPP) clients apply for Unsupported Child's Benefit (UCB) and the referral process to an Independent Assessment Provider

[UCB application process for YPP clients \[http://doogle/resources/helping-clients/products-services/work-and-income/youth-services/unsupported-childs-benefit-application.html\]](http://doogle/resources/helping-clients/products-services/work-and-income/youth-services/unsupported-childs-benefit-application.html)

Unsupported Child's Benefit - Case manager guidelines for interviews

This page provides you with guidelines and information for caregivers who are applying for UCB and the referral process for an Independent Assessment Provider.

Note: All Young Parent Payment (YPP) clients applying for UCB are managed by a service provider or specialist case worker. If a YPP client makes contact with a contact centre or service centre they must be referred to their provider.

Family Breakdown Assessment Service

Barnardos are the provider of Family Breakdown Assessment services for the Ministry. There is a referral letter in CMS.

You can send referral requests to Barnardos at: Out of scope

For enquiries to Barnardos, call Out of scope

Stage	Steps	Tools & Forms
Interview with the applicant	<ol style="list-style-type: none"> In every application for Unsupported Child's Benefit (UCB) the case manager must: <ol style="list-style-type: none"> Determine whether the caregiver meets the basic qualification for UCB (age, residency, whether there is another parent able to provide care etc) Have a discussion with the caregiver to determine what the child's circumstances are and has a breakdown in the child's family occurred and fully complete the Unsupported Child's Benefit Interview form If the applicant is receiving a main benefit as well, you will need to have a discussion with them about the social obligations that will apply to whom the unsupported child benefit is being applied for. Advise the caregiver that in all cases except when there is documentation establishing a breakdown: <ul style="list-style-type: none"> the caregiver and child will be referred to an Independent Assessment Provider. Note: Children aged 14 years and over need to attend the assessment appointment with the caregiver. It is not appropriate for children aged less than 14 years to attend the appointment. This is because generally it may not be appropriate for children aged 13 or younger to participate in family breakdown discussions. the case manager must telephone the child's parents to advise them that Work and Income has received an application for UCB and also send a follow up letter. The letter is in CMS 'Prepare Letter' and is called 'UCB letter to parents'. the child's parents must be invited to the Independent Assessment Provider process, unless there has been: <ul style="list-style-type: none"> care and protection issues have been identified or the child has been discharged from Oranga Tamariki care/has moved into a Home for Life arrangement the child's parent/s will be liable for Child Support the caregiver and child (14 years and over) must sign the Unsupported Child's Support 	<p>UCB flowchart (PDF 71.77KB) [http://doogole/documents/resources/helping-clients/procedures-manuals/work-and-income/main-benefits/ucb-ob/ucb-process-service-centre.pdf]</p> <p>Independent Assessment Provider [http://doogole/map/income-support/main-benefits/orphans-benefit-and-unsupported-childs-benefit/independent-assessment-provider-01.html]</p> <p>Social Obligations (Jobseeker Support) [http://doogole/map/income-support/main-benefits/jobseeker-support/social-obligations-01.html]</p> <p>Social obligations - helpful links [http://doogole/resources/helping-clients/procedures-manuals/work-and-income/core-procedures/social-obligations/index.html]</p> <p>Unsupported Childs Benefit Interview form (PDF 207.97KB) [http://doogole/documents/resources/helping-clients/forms-templates/work-and-income/forms/work-income/ucb-interview-form-v21w.pdf]</p>

Stage	Steps	Tools & Forms
	<p>Interview Sheet</p> <p>5. Register the UCB in SWIFTT</p> <p>6. Ensure the correct relationship type is recorded for the caregiver with the child/ren in CMS</p>	
Evidence of family breakdown	<p>2. An Independent Assessment is not required if there is evidence of a family breakdown. This evidence may be in copies of Family Group Conference outcomes, Court Orders, Court approve plans or documentation from another approved agency.</p> <p>The case manager will determine whether enough evidence is contained in the documents provided to decide eligibility to UCB.</p>	<p>Breakdown in the child's family [http://doogole/map/income-support/main-benefits/orphans-benefit-and-unsupported-childs-benefit/breakdown-in-the-childs-family.html]</p>
Independent Assessment Provider	<p>3. To arrange a referral to an Independent Assessment Provider click here [http://doogole/resources/helping-clients/procedures-manuals/work-and-income/main-benefits/ob-ucb/independent-assessment-provider-ucb-14-only.html].</p> <p>The Independent Assessment Provider report should explain relevant details of the relationship breakdown including:</p> <ul style="list-style-type: none"> • the providers contact or attempts at contact with the parents • who the relationship breakdown is with • how long the child has been experiencing problems • a brief history • risk assessment • why the child has moved from home • what has been tried • what contact the child has had with their parents or other family members and • could anything be changed for a return home • recommendation for reconciliation counselling. <p>The report must include the above details, if not, then refer back to the Independent Assessment Provider. Ensure that any additional information from the Independent Assessment Provider is in writing and is kept with the original report.</p> <p>It should take no more than ten working days for the report to reach Work and Income or within a timeframe agreed to by the case manager and the Independent Assessment Provider.</p> <p>If there are any concerns around the timeframe for reports to reach Work and Income and this is unable to be resolved at a local level please contact the National Contracts team in National Office.</p> <p>When you receive the report from the Independent Assessment Provider, you must make a note in the caregiver's record.</p>	

Stage	Steps	Tools & Forms
	<p>Parents who live in another area</p> <p>When the parent/s of the child is living in another area, a joint Independent Assessment may be undertaken.</p> <p>In this situation the following would happen:</p> <p>The caregiver's Independent Assessment Provider office contacts the parent and gives the parent the option of meeting with an assessor in their area.</p> <ol style="list-style-type: none"> 1. If the parent chooses not to have a meeting, the caregiver's assessor will conduct an interview over the phone. 2. If the parent chooses to have a meeting then the Independent Assessment Provider will arrange a meeting with an Independent Assessor in the parent's area. 3. The Independent Assessment Provider in the caregiver's area then contacts Work and Income to advise the: <ul style="list-style-type: none"> ◦ date the client was interviewed ◦ area where the parent is living ◦ timeframe for the parent interview and ◦ timeframe for the full report 4. Following the parent's interview, a report is forwarded to the caregiver's Independent Assessment Provider who considers the information and includes it in their report. 	
<p>Independent Assessment Provider Recommendations and Disputes</p>	<p>4. Work and Income decides who can receive an Unsupported Child's Benefit using information in the assessment report.</p> <p>Note: all UCB grants must be approved by a Manager Client Service Delivery/Operations.</p> <p>If you have concerns about the recommendations made by the Independent Assessment Provider you should follow these steps:</p> <ol style="list-style-type: none"> 1. Give an objective account of your concerns to the Independent Assessment Provider assessor and ask for the reasons behind their recommendation. (Additional information should always be documented.) 2. If you need further help to decide the case, discuss it with your service centre trainer or Helpline. <p>Service provided by the Independent Assessment Provider</p> <p>If you have any concerns about the service provided by the Independent Assessment Provider (or their practices and procedures), discuss these first with your manager. Wherever possible, issues should be resolved at a local level.</p> <p>If the issue cannot be resolved at a local level or if you have any queries contact</p> <p>Out of scope</p>	<p>Privacy Act 1993 guidelines [http://dooglegmap/legislation/guidelines/privacy-act-1993-guidelines/privacy-act-1993-guidelines.html]</p>

Stage	Steps	Tools & Forms
	<div data-bbox="427 114 949 152">Out of scope</div> <p data-bbox="427 159 949 174">.</p> <p data-bbox="427 199 949 237">Requests to access the report</p> <p data-bbox="427 253 949 342">The Independent Assessment Provider report remains confidential to Work and Income.</p> <p data-bbox="427 365 949 483">If a parent or caregiver requests a copy of the Independent Assessment Provider report, they can make this request to Work and Income.</p> <p data-bbox="427 506 949 824">Generally speaking, the only parts that can be released to the person are those that contain personal information about themselves. Information about the caregiver should not be released to the parent and vice versa. When considering releasing information from the report you should contact Privacy [http://doogee/helping-you/information-hub/privacy-and-security-of-information/privacy-of-information/requests-for-personal-information.html].</p>	

Orphan's Benefit and Unsupported Child's benefit

Information and processes for Orphan's Benefit and Unsupported Child's Benefit, including extra help payments like Extraordinary Care Fund, School and Year Start Up Payment (SAYSUP), and Establishment Grants.

The [Orphan's Benefit \(OB\) and Unsupported Child's Benefit \(UCB\)](#) provides income support to the caregiver of a child whose parents can't support them as their principal caregiver (excl caregivers getting help from Oranga Tamariki or Family Tax Credit).

This can be for several reasons, including where the natural or adoptive parents are deceased, or are unable to look after the child due to long-term illness / incapacity or a family breakdown.

The [rate of payment](#) is based on the child's age. The income and assets of the caregiver won't affect the payment of these benefits. For UCB, child support will be sought from the child's parents.

Note: if the child is a 16-17 year old, Youth Payment should be considered.

See the following Map links for more information:

- [Child Support - Paying parent](#)
- [Orphan's Benefit](#)
- [Unsupported Child's Benefit](#)

✓ Applying for OB or UCB

Removal of 12 month requirem...

CSR process

Since 1 July 2021, all clients who are taking care of a child for a period of less than 12 months can access OB or UCB as long as they meet all the other qualifications.

Clients who may now qualify for OB or UCB because of the removal of the 12 month requirement, include those caring for a child because the child's parent is:

- unable to care for the child as they're in prison for a short time (less than 12 months.)
- suffering from a serious illness or incapacity and is unable to care for the child (less than 12 months).

Note: This is not a full list, more information on the change will be available in Map.

Principal Caregiver vs Principal Temporary Caregiver

Clients who now qualify for OB or UCB under the new rules are called **Principal Temporary Caregivers**. This is applied to clients who are responsible for a child's primary day-to-day care on a temporary or short term basis that is less than 12 months.

If a client will have the child in care long term (12 months or more) they will still be considered the child's **Principal Caregiver**.

Note: All clients who were granted OB or UCB before 1 July 2021 are considered the child's Principal Caregiver.

▼ OB and UCB SWIFTT actions

Checking OB or UCB payments

Step	Process
1.	<ul style="list-style-type: none">• Launch 'SWIFTT'• go to 'SDETI'
2.	<ul style="list-style-type: none">• select record• go to next activity field and type 'SSTAI'• press 'ENTER'
3.	To view payments: <ul style="list-style-type: none">• SPYHI

Suspending OB and UCB benefits

♦ If the client gets OB / UCB for more than one child and only one child is to be excluded - don't action, instead:

- create a client event note
- add details of the OB or UCB review required
- send to the service centre ready for processing queue in CMS

Step	Suspension Process
1.	<ul style="list-style-type: none">• Launch 'SWIFTT'• go to 'SDETI'

Step	Suspension Process
2.	<ul style="list-style-type: none"> • select record • go to next activity and type 'SSTAI' • press 'ENTER'
3.	<p>SBSR</p> <ul style="list-style-type: none"> • suspend from the beginning of the next pay period (either the next Monday or the Monday following the child leaving the client's care - whichever is the later date).
4.	<ul style="list-style-type: none"> • create a client event note • add details of the OB or UCB review required • send to the service centre ready for processing queue in CMS

Suspending OB and UCB records - if only receiving for 1 child

Step	Process
1.	<p>Launch SWIFTT</p> <ul style="list-style-type: none"> • go to SDETI
2.	<p>Select the record</p> <ol style="list-style-type: none"> 1. go to next activity and type SSTAI 2. press ENTER
3.	<p>SBSR</p> <ul style="list-style-type: none"> • suspend the benefit from the beginning of the next pay period

4.	<ul style="list-style-type: none"> • create a client event note • add details of the OB or UCB review required • send to the service centre ready for processing queue in CMS

✓ Extraordinary Care Fund, School and Year Start-up Payment (SAYSUP), and other Extra Help payments

Extraordinary Care Fund (ECF)

ECF is available to cover additional costs for children who are showing promise in a particular area or who are experiencing significant difficulty that's impacting on their development.

- [ECF Eligibility](#) (Map)
 - [ECF Applications - costs excluded](#) (Map)
1. Clients can apply at any time during the year through the [Extraordinary Care Fund application](#) (Work and Income website). Clients can print this off, complete it and return to us by uploading the completed form via MyMSD or dropping it into their nearest office, no appointment needed.
 2. When an application is provided, we'll send it to the ECF team who'll add it to the next application round (4 rounds per year) for the panel to consider.
 3. Applicants can receive **one grant** of up to \$2,000 each financial year. More information: [Payment](#) (Map)
 4. When a client calls to check the status of their application, check the client's 'View Letters' to see if anything about their ECF application has been sent to them. Take a look at the 'application window' dates [Extraordinary Care Fund timeframe](#) (Doogle) and if you're still unable to shed any light on the progress of their application, please take the client's details (SWN, name, contact ph) and email it to: [Extraordinary Care Fund team](#)

- ❖ ECF isn't covered by the Review of Decision process. If a client wants the decision reconsidered, they'll need to complete a Personal Details form outlining their reasons. See: [Reconsideration of decision](#) (Doogle)

For any escalations, please email [Extraordinary Care Fund team](#).

School and Year Start-up Payment (SAYSUP)

An annual one off payment that helps with the costs that mostly happen at the beginning of the year eg, school uniforms, stationery, school fees, etc. The amount available depends on the age of the child.

This application can be made online through the Work and Income website (the form isn't in MyMSD) annually from **mid January until the end of February**. If the client misses the application window, they'll need a good and sufficient reason for their application to be considered.

Important things to remember:

- SAYSUP is automatically processed, but for automation to happen, the details the client puts in application has to match the information held in MSD system EXACTLY. If there's a spelling error of their child's name, or a wrong date in their birthday the task is sent for manual processing by CPU.
- To check if the application is in queue for processing, go to S2P and from there and it will appear under the "specialised SAYSUP" heading. This means the client has completed the application, submitted it online and doesn't need to do anything else.
- Advise the client that their application has been received and will be paid within 10 working days. Submitting a further application may delay payment as the second application will hold up the first one.
- A client event note will be left in CMS when the payment has been issued to the client.

More information:

[School and Year Start-up Payment](#) (Doogee)

[School and Year Start-up Payment](#) (Work and Income)

Establishment Grant

This is a one-off payment of \$350 made to all clients who are granted OB / UCB. It's paid automatically into the client's bank account within 3 days of the benefit being granted.

Note: Payment is not available to those who get an upfront payment as part of the 'Home for Life' support package from Oranga Tamariki.

More information: [Establishment Grant](#) (Map)

Clothing grant

This is a weekly payment made automatically to help pay for the child's clothing. The amount received depends on the age of the child.

More information: [Clothing Allowance](#) (Map)

Holiday and Birthday Allowance

Clients who receive OB UCB payments will also get:

- a 'Holiday payment' approx two weeks before December 25. This payment is intended to allow caregivers to purchase a gift or prepare a celebration, event or experience.
- another payment two weeks in advance of the child's birthday to allow caregivers time to purchase a gift or prepare a celebration, event or experience for the child.

For more information, see: [Holiday and Birthday Allowance](#) (Work and Income)

✓ Determining if a client qualifies for OB or UCB

The removal of the 12 month eligibility rule does not impact the application process for these payments.

Clients must still meet all other existing qualifications, and a family breakdown must still be established for UCB.

More information about how a breakdown can be established can be found: [What is a breakdown in the child's family](#) (Map)

Note: Where there's no proof of a family breakdown, or you cannot establish a family breakdown, a referral should be made to Barnados. This should only happen when there is no other way to establish a family breakdown. If proof already exists, then no referral is needed.

Please see [Breakdown in the child's family](#) (Map) for further information about when to refer.

If you are unsure if a referral is needed, speak to your onsite Capability Developer.

❗ **CM process only:** Where it is clear OB should be granted, the staff member should process the application. No proof of a family breakdown needs to be established.

Family breakdown vs family arrangement

Some families may have an arrangement where a family member (who is not the child's parent) takes primary responsibility for the child's day to day care. This could be for several reasons, including to support the parent's working arrangements or opportunities for the child to learn about their culture by staying with extended family.

A client will not qualify for UCB in situations where a family arrangement has been put in place but there has been no family breakdown.

Example: Johnny has moved in with his aunt because she lives closer to the school his parents want him to attend. His parents and aunt have come to an agreement that he

will live with her during the school year and with them during the holidays. Even though Johnny's parents are not caring for him on a day-to-day basis, no family breakdown has occurred and so Johnny's aunt does not qualify for UCB.

▼ Situations when OB and UCB cannot be granted

Situations when OB and UCB should not be granted

There are certain situations in which OB and UCB should not be granted, even if a client is caring for someone else's child. This could be when:

- someone is looking after a child for the school holidays
- the child is being cared for by a host family if they are studying in NZ
- there is a boarding school arrangement
- someone caring for a child while their parent recovers from a short-term illness
- arrangements are made for someone to look after a child to support a parent's employment
- there is a family arrangement where there has been no family breakdown (for UCB)

Note: This list is not exhaustive.

In these situations, OB and UCB should be declined without a referral to an Independent Assessment Provider as no breakdown has occurred. The client should test eligibility to other assistance if needed.

▼ Flow on impacts to other assistance

Sole Parent Support

Single clients who qualify under the current rules for OB or UCB may choose to receive Sole Parent Support (SPS) instead.

Clients who access OB or UCB as a 'Principal Temporary Caregiver' will not be able to do so. This is because in order to qualify for SPS, the period of care must be long-term or permanent.

It is important that Sole Parent Support is only offered where the client meets the definition of 'Principal Caregiver' and the care is expected to be long-term or permanent.

OB and UCB specific assistance

All clients who are eligible for OB or UCB as Principal Temporary Caregivers are eligible for all OB or UCB specific assistance.

Take a look at the 'Extra Help for OB and UCB clients' section for more information.

Birthday and Holiday Allowance

The Birthday and Holiday Allowance payments were introduced 1 December 2021. These are one off payments that will be paid to clients before a child's birthday and December 25 respectively. Clients who qualify for OB or UCB under a 'Principal Temporary Caregiver' relationship will also be eligible for these payments.

Supplementary assistance

Clients who qualify for OB or UCB under the new 'Principal Temporary Caregiver' definition will also qualify for other child related supplementary assistance. This includes Childcare assistance (CCA), Child Disability Allowance (CDA), and Disability Allowance (DA).

Please make sure the client meets all other qualifications before granting this assistance.

❗ CM only processes below

✓ Granting OB or UCB

Grant process for OB and UCB

The grant process for OB and UCB remains largely unchanged, however there are two new fields to complete when including an OB or UCB child in the SCHIE screen.

These fields are labelled: **"Principal Caregiver?"** and **"Pay BSTC?"** and will only be visible and mandatory for OB and UCB clients. Further instructions for how to complete these fields can be found below.

Principal Caregiver field	<p>If the client is the child's Principal Caregiver:</p> <ol style="list-style-type: none">1. Fill in the screen as per BAU; and2. Enter 'Y' into the 'Principal Caregiver' Field. <p>If the client is a Principal Temporary Caregiver, go to SCHIE and:</p> <ol style="list-style-type: none">1. Fill in the screen as per BAU; and2. Enter 'N' into the 'Principal Caregiver' Field.
Impact of the removal of the 12 month eligibility rule	<p>Currently, BSTC is paid automatically when a child of qualifying age is included in OB or UCB if the client is also receiving a main benefit. Because clients who are caring for</p>

on Best Start tax credit (BSTC) entitlement	a child for less than 12 months will not be considered the child's "Principal Caregiver", they will no longer qualify for BSTC automatically. This is because they may not meet Inland Revenue's definition of "Principal Caregiver."
Pay BSTC field	<p>The "Pay BSTC" field needs to be completed for all OB and UCB children under three so that BSTC is paid correctly, and the correct information is sent to IR.</p> <p>This field is only mandatory if the child is under three years of age or is being included from a date prior to their third birthday. After the child turns four, this field will disappear. If you are including a child that is four or older, this field will not appear, and you will only need to complete the "Principal Caregiver" field.</p>

Main benefit + OB or UCB

If the client is receiving a main benefit and OB or UCB, use the value of the "Principal Caregiver" field to determine the value for the "Pay BSTC" field.

- "Y" in "Principal Caregiver" field = "Y" in Pay BSTC field.
- "N" in "Principal Caregiver" field = "N" in Pay BSTC field.

This will pay BSTC alongside the clients benefit.

Note: The SNSRA screen should be completed as per BAU if the client wants their FTC paid by IR.

Refer the client to IR to test eligibility for BSTC when "N" is entered. More information about this can be found below.

Non-beneficiary assistance + OB or UCB | OB or UCB only

If the client is not receiving a main benefit, then "N" should always be entered in the "Pay BSTC" field regardless of what value is entered in the "Principal Caregiver" field.

This is because MSD cannot determine eligibility, and clients will need to talk to IR about if they are eligible for BSTC.

Child inclusion from a date before their 3rd birthday

The "Pay BSTC" field will default to "N" if a three year old child is being included in OB or UCB because children only qualify up until they turn three. If the child must be included from a date prior to their third birthday, and they are eligible to receive BSTC (the client is the child's "Principal Caregiver") you will need to:

1. Complete SCHIE as per BAU
2. Enter "Y" in the "Principal Caregiver" field
3. Change "N" to "Y" in the "Pay BSTC" field

4. Press enter.

This will pay BSTC from the date of inclusion up until the day before the child's third birthday. Once the arrears have been paid out, the field will default back to "N" overnight.

✓ Referring clients to IR to test their BTSC eligibility | Sending letters

Test BSTC eligibility

If a client is receiving a main benefit and OB or UCB, and the value in the "Pay BSTC" field is "N", they should be referred to IR to test eligibility to BSTC.

If IR determines the client is eligible for BSTC, they will give the client a letter to prove that they have discussed this.

Please advise the client that they will need to take this letter to their local office.

Once this letter has been provided, you should:

1. Scan the letter to the client's CMS record, save it under supporting documents and select WfF tax credits. (See screenshot)
2. Open SWIFTT and go to SCHI
3. Select the correct child and "CHG"
4. Change "N" to "Y" in the "Pay BSTC" field
5. Press enter.

Once this has been changed, BSTC will start paying from FAD.

Edit Document Details: Client Name: T'est Tester Client - SWN

Document Details

Type

Supporting

WIF Tax Credits

Owner

T'est Client

Save Cancel

Client Documents

Complete List

Forms and Supporting Documents

Action	Document Name	Document Details	Owner	Child's Name	Status
View	Letter		T'est Tester Client		Saved
View	Letter		T'est Tester Client		Saved
View	Letter		T'est Tester Client		Saved
View	Trust Documents	Lawyer Letter	T'est Tester Client		Saved
View	WIF Tax Credits	WIF Tax Credits	T'est Tester Client		Saved
View	Letter		T'est Tester Client		Linked
View	Person Details		T'est Tester Client		Linked
View	WIF Tax Credits	WIF Tax Credits	T'est Tester Client		Linked
View	Seniors Annual Review		Shared		Linked
View	TTW Grant		Shared		Linked

If you can't process the action immediately, you should scan the letter to the client's file. Create a new client event note: Service Delivery; Financial Assistance; Unsupported Child's Benefit or Orphan's Benefit and note that the client has provided proof from IR that they are eligible to receive BSTC. You will then need to assign it the site's work queue for processing.

Sending grant letters to OB and UCB clients

Because "Principal Temporary Caregivers" may not be eligible for BSTC, they'll need to be sent a different version of the OB or UCB grant letter. You should prepare the letter as per BAU, but select the optional paragraph below:

Best Start tax credit

Best Start tax credit is a Working for Families tax credit. You may be eligible to receive this tax credit if any of the children in your care are less than three years old. The tax credit is income tested for children aged one and older.

If you want to receive the Best Start tax credit, please contact Inland Revenue to check if you are eligible.

Once you have selected this, send the letter to the client as per business as usual.

▼ Review of Circumstances

Clients who receive UCB, either with or without a main benefit, must complete a “Confirming your Circumstances” form at regular intervals to confirm that their circumstances have not changed since UCB was granted or their last review.

If you are completing a review for a client who was granted UCB as a “Principal Temporary Caregiver” from 1 July 2021 onwards, you will need to clear the CYC expiry and:

- check if the client has now had any UCB children in their care for 12 months or more. You can check what date the child was included from in “SCHI” in SWIFTT.
- if so, select that child in “SCHI” and update the “Principal Caregiver?” flag in SCHIE to “Y”
- check the client’s record to see if the client may qualify for other assistance, such as Sole Parent Support.

If it looks like the client may qualify, contact them to discuss their circumstances and test eligibility.

If the client is eligible and would like to apply for further assistance following your conversation, please direct them to the online application. Create a request for financial assistance in their CMS record and manage any other actions as per business as usual.

Note: OB clients do not complete a CYC. If you engage with an OB client at any point from 1 July 2022 onwards, please ensure that you check if they were granted OB as a “Principal Temporary Caregiver”. If they were, and the child has been in their care for 12 months or more, please update the “Principal Caregiver” flag and test eligibility to other assistance if it looks like they may qualify.

Feedback

Orphan's Benefit and Unsupported Child's benefit

Information and processes for Orphan's Benefit and Unsupported Child's Benefit, including extra help payments like Extraordinary Care Fund, School and Year Start Up Payment (SAYSUP), and Establishment Grants.

The [Orphan's Benefit \(OB\) and Unsupported Child's Benefit \(UCB\)](#) provides income support to the caregiver of a child whose parents can't support them as their principal caregiver (excl caregivers getting help from Oranga Tamariki or Family Tax Credit).

This can be for several reasons, including where the natural or adoptive parents are deceased, or are unable to look after the child due to long-term illness / incapacity or a family breakdown.

The [rate of payment](#) is based on the child's age. The income and assets of the caregiver won't affect the payment of these benefits. For UCB, child support will be sought from the child's parents.

Note: if the child is a 16-17 year old, Youth Payment should be considered.

See the following Map links for more information:

- [Child Support - Paying parent](#)
- [Orphan's Benefit](#)
- [Unsupported Child's Benefit](#)

✓ Applying for OB or UCB

Removal of 12 month requirem...

CSR process

Step	Process
1.	<p>Check the caller's eligibility to OB / UCB</p> <ul style="list-style-type: none"> • Orphan's and Unsupported Child's Benefit <p>As a listener, your role is to understand what is being said. Get the client's reason for calling using open-ended questions which promote more than one sentence responses:</p> <ul style="list-style-type: none"> • <i>'Could you tell me a bit more about your situation?'</i>

Step	Process
	<p>To make sure you've understood, paraphrase what you've heard:</p> <ul style="list-style-type: none"> • <i>'What I'm hearing is....'</i> and <i>'sounds like you're saying....'</i> are great ways to reflect back and paraphrase • Ask questions to clarify certain points <i>'what do you mean when you say....'</i> and <i>'is this what you mean?'</i> • Summarise the caller's comments every so often to confirm your understanding
2.	<p>Check if the client has a SWN and locate the record</p> <ul style="list-style-type: none"> • CMS User Guide: How to search for a client <p>If there is no record, you will need to create one.</p> <ul style="list-style-type: none"> • CMS User Guide: Creating a new person
3.	<p>New Application appointment</p> <ul style="list-style-type: none"> • Book it in as a face-to-face appointment with a case manager at the client's local office, through Q-Manager. <p>UCB only: if the child is aged 14+ please encourage the client to bring them to the appointment as they'll both need to sign the UCB interview sheet.</p>
4.	<p>Complete the Request Screen</p> <ul style="list-style-type: none"> • Note the request screen • Verbally advise the client of the 20 working day rule <p>Don't send the request letter (unless the client requests the letter or you have not advised the 20 working day rule).</p>

✓ OB and UCB SWIFTT actions

Checking OB or UCB payments

Step	Process
1.	<ul style="list-style-type: none"> Launch 'SWIFTT' go to 'SDETI'
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Suspending OB and UCB benefits

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- create a client event note
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	queue in CMS

Suspending OB and UCB records - if only receiving for 1 child

Step	Process
1.	Launch SWIFTT <ul style="list-style-type: none"> go to SDETI
2.	Select the record <ol style="list-style-type: none"> go to next activity and type SSTAI press ENTER
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Important things to remember:

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[School and Year Start-up Payment](#) (Work and Income)

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✓ Determining if a client qualifies for OB or UCB

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Clients must still meet all other existing qualifications, and a family breakdown must still be established for UCB.

More information about how a breakdown can be established can be found: [What is a breakdown in the child's family](#) (Map)

Note: Where there's no proof of a family breakdown, or you cannot establish a family breakdown, a referral should be made to Barnados. This should only happen when there is no other way to establish a family breakdown. If proof already exists, then no referral is needed.

Please see [Breakdown in the child's family](#) (Map) for further information about when to refer.

If you are unsure if a referral is needed, speak to your onsite Capability Developer.



Where it is clear OB should be granted, the staff member should process the application. No proof of a family breakdown needs to be established.

Family breakdown vs family arrangement

Some families may have an arrangement where a family member (who is not the child's parent) takes primary responsibility for the child's day to day care. This could be for several reasons, including to support the parent's working arrangements or opportunities for the child to learn about their culture by staying with extended family.

A client will not qualify for UCB in situations where a family arrangement has been put in place but there has been no family breakdown.

Example: Johnny has moved in with his aunt because she lives closer to the school his parents want him to attend. His parents and aunt have come to an agreement that he will live with her during the school year and with them during the holidays. Even though Johnny's parents are not caring for him on a day-to-day basis, no family breakdown has occurred and so Johnny's aunt does not qualify for UCB.

▼ Situations when OB and UCB cannot be granted

Situations when OB and UCB should not be granted

There are certain situations in which OB and UCB should not be granted, even if a client is caring for someone else's child. This could be when:

- someone is looking after a child for the school holidays
- the child is being cared for by a host family if they are studying in NZ
- there is a boarding school arrangement
- someone caring for a child while their parent recovers from a short term illness
- arrangements are made for someone to look after a child to support a parent's employment
- there is a family arrangement where there has been no family breakdown (for UCB)

Note: This list is not exhaustive.

In these situations, OB and UCB should be declined without a referral to an Independent Assessment Provider as no breakdown has occurred. The client should test eligibility to other assistance if needed.

▼ Flow on impacts to other assistance

Sole Parent Support

Single clients who qualify under the current rules for OB or UCB may choose to receive Sole Parent Support (SPS) instead.

Clients who access OB or UCB as a 'Principal Temporary Caregiver' will not be able to do so. This is because in order to qualify for SPS, the period of care must be long-term or permanent.

It is important that Sole Parent Support is only offered where the client meets the definition of 'Principal Caregiver' and the care is expected to be long-term or permanent.

OB and UCB specific assistance

All clients who are eligible for OB or UCB as Principal Temporary Caregivers are eligible for all OB or UCB specific assistance.

Take a look at the 'Extra Help for OB and UCB clients' section for more information.

Birthday and Holiday Allowance

The Birthday and Holiday Allowance payments were introduced 1 December 2021. These are one off payments that will be paid to clients before a child's birthday and December 25 respectively. Clients who qualify for OB or UCB under a 'Principal Temporary Caregiver' relationship will also be eligible for these payments.

Supplementary assistance

Clients who qualify for OB or UCB under the new 'Principal Temporary Caregiver' definition will also qualify for other child related supplementary assistance. This includes Childcare assistance (CCA), Child Disability Allowance (CDA), and Disability Allowance (DA).

Please make sure the client meets all other qualifications before granting this assistance.

❗ **CM only processes below**

▼ Granting OB or UCB

Grant process for OB and UCB

The grant process for OB and UCB remains largely unchanged, however there are two new fields to complete when including an OB or UCB child in the SCHIE screen.

These fields are labelled: **“Principal Caregiver?”** and **“Pay BSTC?”** and will only be visible and mandatory for OB and UCB clients. Further instructions for how to complete these fields can be found below.

Principal Caregiver field	<p>If the client is the child’s Principal Caregiver:</p> <ol style="list-style-type: none">1. Fill in the screen as per BAU; and2. Enter ‘Y’ into the ‘Principal Caregiver’ Field. <p>If the client is a Principal Temporary Caregiver, go to SCHIE and:</p> <ol style="list-style-type: none">1. Fill in the screen as per BAU; and2. Enter ‘N’ into the ‘Principal Caregiver’ Field.
Impact of the removal of the 12 month eligibility rule on Best Start tax credit (BSTC) entitlement	<p>Currently, BSTC is paid automatically when a child of qualifying age is included in OB or UCB if the client is also receiving a main benefit. Because clients who are caring for a child for less than 12 months will not be considered the child’s “Principal Caregiver”, they will no longer qualify for BSTC automatically. This is because they may not meet Inland Revenue’s definition of “Principal Caregiver.”</p>
Pay BSTC field	<p>The “Pay BSTC” field needs to be completed for all OB and UCB children under three so that BSTC is paid correctly, and the correct information is sent to IR.</p> <p>Note: This field is only mandatory if the child is under three years of age or is being included from a date prior to their third birthday. After the child turns four, this field will disappear. If you are including a child that is four or older, this field will not appear, and you will only need to complete the “Principal Caregiver” field.</p>

Main benefit + OB or UCB

If the client is receiving a main benefit and OB or UCB, use the value of the “Principal Caregiver” field to determine the value for the “Pay BSTC” field.

- “Y” in “Principal Caregiver” field = “Y” in Pay BSTC field.
- “N” in “Principal Caregiver” field = “N” in Pay BSTC field.

This will pay BSTC alongside the clients benefit.

Note: The SNSRA screen should be completed as per BAU if the client wants their FTC paid by IR.

Refer the client to IR to test eligibility for BSTC when “N” is entered. More information about this can be found below.

Non-beneficiary assistance + OB or UCB | OB or UCB only

If the client is not receiving a main benefit, then “N” should always be entered in the “Pay BSTC” field regardless of what value is entered in the “Principal Caregiver” field.

This is because MSD cannot determine eligibility, and clients will need to talk to IR about if they are eligible for BSTC.

Child inclusion from a date before their 3rd birthday

The “Pay BSTC” field will default to “N” if a three year old child is being included in OB or UCB because children only qualify up until they turn three. If the child must be included from a date prior to their third birthday, and they are eligible to receive BSTC (the client is the child’s “Principal Caregiver”) you will need to:

1. Complete SCHIE as per BAU
2. Enter “Y” in the “Principal Caregiver” field
3. Change “N” to “Y” in the “Pay BSTC” field
4. Press enter.

This will pay BSTC from the date of inclusion up until the day before the child’s third birthday. Once the arrears have been paid out, the field will default back to “N” overnight.

✓ Referring clients to IR to test their BTSC eligibility | Sending letters

Test BSTC eligibility

If a client is receiving a main benefit and OB or UCB, and the value in the “Pay BSTC” field is “N”, they should be referred to IR to test eligibility to BSTC.

If IR determines the client is eligible for BSTC, they will give the client a letter to prove that they have discussed this.

Please advise the client that they will need to take this letter to their local office.

Once this letter has been provided, you should:

1. Scan the letter to the client’s CMS record, save it under supporting documents and select WfF tax credits. (See screenshot)
2. Open SWIFTT and go to SCHI
3. Select the correct child and “CHG”
4. Change “N” to “Y” in the “Pay BSTC” field
5. Press enter.

Once this has been changed, BSTC will start paying from FAD.

Edit Document Details: Client Name: Test Tester Client - SWN

Document Details

Type: Supporting

WF Tax Credits

Owner: Test Client

Save Cancel

Client Documents

Complete List

Forms and Supporting Documents

Action	Document Name	Document Details	Owner	Child's Name	Status
View	Letter		Test Tester Client		Saved
View	Letter		Test Tester Client		Saved
View	Letter		Test Tester Client		Saved
View	Trust Documents	Lawyer Letter	Test Tester Client		Saved
View	WF Tax Credits	WF Tax Credits	Test Tester Client		Saved
View	Letter		Test Tester Client		Linked
View	Person Details		Test Tester Client		Linked
View	WF Tax Credits	WF Tax Credits	Test Tester Client		Linked
View	Seniors Annual Review		Shared		Linked
View	TTW Grant		Shared		Linked

If you can't process the action immediately, you should scan the letter to the client's file. Create a new client event note: Service Delivery; Financial Assistance; Unsupported Child's Benefit or Orphan's Benefit and note that the client has provided proof from IR that they are eligible to receive BSTC. You will then need to assign it the site's work queue for processing.

Sending grant letters to OB and UCB clients

Because "Principal Temporary Caregivers" may not be eligible for BSTC, they'll need to be sent a different version of the OB or UCB grant letter. You should prepare the letter as per BAU, but select the optional paragraph below:

Best Start tax credit

Best Start tax credit is a Working for Families tax credit. You may be eligible to receive this tax credit if any of the children in your care are less than three years old. The tax credit is income tested for children aged one and older.

If you want to receive the Best Start tax credit, please contact Inland Revenue to check if you are eligible.

Once you have selected this, send the letter to the client as per business as usual.

▼ Review of Circumstances

Clients who receive UCB, either with or without a main benefit, must complete a “Confirming your Circumstances” form at regular intervals to confirm that their circumstances have not changed since UCB was granted or their last review.

If you are completing a review for a client who was granted UCB as a “Principal Temporary Caregiver” from 1 July 2021 onwards, you will need to clear the CYC expiry and:

- check if the client has now had any UCB children in their care for 12 months or more. You can check what date the child was included from in “SCHI” in SWIFTT.
- if so, select that child in “SCHI” and update the “Principal Caregiver?” flag in SCHIE to “Y”
- check the client’s record to see if the client may qualify for other assistance, such as Sole Parent Support.

If it looks like the client may qualify, contact them to discuss their circumstances and test eligibility.

If the client is eligible and would like to apply for further assistance following your conversation, please direct them to the online application. Create a request for financial assistance in their CMS record and manage any other actions as per business as usual.

Note: OB clients do not complete a CYC. If you engage with an OB client at any point from 1 July 2022 onwards, please ensure that you check if they were granted OB as a “Principal Temporary Caregiver”. If they were, and the child has been in their care for 12 months or more, please update the “Principal Caregiver” flag and test eligibility to other assistance if it looks like they may qualify.

Feedback