

Review of Annual Income

The Review of Annual Income (due-paid assessment) ensures that clients receiving a benefit where income can be charged annually have received the correct rate of payment throughout the year. Centralised Services is responsible for completing due-paid assessments.

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Clients that can have a Review of Annual Income

Clients receiving a benefit where income can be charged annually have a Review of Annual Income if they have earned income that has abated their benefit. This is called a due-paid assessment. Benefits that can have income charged annually are:

Sole Parent Support

Supported Living Payment

Jobseeker Support, only:

Sole parents

Grandparented clients

Emergency Benefit – only where the analogous benefit is SPS or SLP

Emergency Maintenance Allowance

New Zealand Superannuation or Veterans Pension – non qualified spouse/partner included (also includes Veterans Pension for under 65 year olds)

Income is assessed against the client's benefit for the 52 week period after the commencement date, and every 52 weeks thereafter, using income earned in that same period.

If the client has transferred between benefits where income can be charged annually, the commencement date is the commencement date of their first benefit, not the date they transferred.

Review of Annual Income Process

Clients who have income recorded that has abated their benefit during the year are sent a letter 10 working days after the 52 week income period that is being reviewed ends. Depending on their circumstances, they will be sent a letter that asks them to:

Provide verification for all income earned during the 52 week period: The client will be sent a reminder letter after 10 working days if they have not returned verification. If verification is not returned within 20 working days, their benefit will automatically suspend.

Confirm that the income we have recorded is correct: If it's correct, they don't need to do anything and we'll complete the review based on the information we already hold. If their income is different then they'll need to provide verification.

Clients can provide verification by post directly to Centralised Services for processing, or drop it into their service centre.

Note: If the client's suspension date falls within the week before or including 26 December, it will be moved to the first Monday following 2 January of the following year. SWIFTT will calculate the new suspension date automatically.

SWIFTT

If a client needs to verify their income, this will show in the SSTA screen in SWIFTT when their letter has been sent. For these clients, the 'Next Review/Reapp' field will display 'Income Review' and the suspension date. For clients who are only asked to confirm their income, this field will remain blank because there is no suspension date.

The review can also be viewed and cleared in SRENA by selecting 'Income Review' in the 'Review Type' drop-down box. For more information on what type of Review of Annual Income a client will have, refer to:

[Review of Annual Income client groups](#)

Low Trust Clients

Low trust client management clients will need to verify their income at an appointment with their case manager. At this appointment:

confirm that the client understands Work and Income's definition of income

verify all income the client has earned during the 52 week period

scan, save and link the verification to an 'Annual income due/paid assessment' Client Event, and assign this to the 'Centralised annual income due/paid assessments Ready for Processing' queue.

If more information is needed (for example, the client has not provided verification for the entire period that they were earning income), the client will need to book another appointment. Any verification that the client provides at their first appointment must be scanned, saved and linked to an 'Annual income due/paid assessment' → 'Additional information required' Client Event. Note in the Client Event what further verification the client has been asked to provide, and assign the Client Event to the 'Centralised annual income due/paid assessments Work on Hold' queue.

Note: you may consider an extension if there are no appointments available before the client's suspension date.

Extensions

If a client can't provide verification before their suspension date then they may be granted an extension.

They need to have a good and sufficient reason, for example:

the client has been in hospital

the client was overseas on approved travel when their letter was sent

the client's employer is not able to provide them with income information within the timeframe.

In general, 10 working days is an appropriate extension. However, there may be some cases when it is reasonable to give the client more time. If granting more than 25 working days, you must discuss this with your manager.

Note: the new suspension date should be added for the Monday following the extension date

To grant an extension:

Record the reason for the extension in an 'Annual income due/paid assessment' Client Event and assign this to the 'Centralised annual income due/paid assessments Work on Hold' queue.

Clear the review in SWIFTT

Add a future suspension using reason code 'lack of representation'

Advise the client of the new suspension date.

Queuing work to Centralised Services

Clients that need to provide verification of their income may bring this into a service centre. You need to:

Check that income information for the entire 52 week period has been provided. If not, advise the client what further information is required.

If the client has provided all information, scan, save and link the verification to an 'Annual income due/paid assessment' Client Event.

Assign the Client Event to the 'Centralised annual income due/paid assessments Ready for Processing' queue.

Clear the review in SWIFTT as returned.

If more verification is needed

Scan, save and link the verification that has been provided to a 'Annual income due/paid assessment' → 'Additional information required' Client Event. Note the verification that the client has been asked to provide.

Assign the Client Event to the 'Centralised annual income due/paid assessments Work on Hold' queue.

Benefit suspended or expired at the time of review

A client will not be sent letter if their benefit is suspended or expired at the time their letter is due to be sent (10 working days after their 52 week period ends).

However, an expiry date will still be added onto their record in SWIFTT if they need to provide verification. This means that the SSTA screen will display when the client's Review of Income is due and, if this date has passed, stop you from resuming the benefit without clearing the review in SWIFTT.

Clients that need to verify their income - process for service centre staff

If the client's Review of Annual Income was not sent and the client makes contact to resume their benefit, you need to:

Print the letter in the Launch Correspondence tab

Consider whether it is appropriate to grant an extension, depending on their suspension date. If an extension is granted, clear the review in SWIFTT, add a future suspension date and advise the client of their new suspension date

Note: if the client makes contact to resume their benefit after the date the review of circumstances was due, SWIFTT will display an error message if you try to resume their benefit.

Clients that confirm their income - process for Centralised Services

Clients who can confirm their income do not have expiries in SWIFTT. Centralised Services will monitor a report to identify when these clients have their benefit resumed. Centralised Services will send these clients their letter.

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