

9(2)(a)

From: 9(2)(a) @ird.govt.nz>
Sent: Monday, 9 March 2020 9:38 am
To: 9(2)(a)
Subject: RE: Variation to IR/MSD Common Debtor Research MoU

[IN CONFIDENCE]

Thanks 9(2)(a), much appreciated.

I'll get this to Warren and 9(2)(a) for signing today 😊

9(2)(a)

From: 9(2)(a)
Sent: Monday, 9 March 2020 9:29 AM
To: 9(2)(a)
Cc: 9(2)(a)
Subject: RE: Variation to IR/MSD Common Debtor Research MoU

Morena 9(2)(a)

I understand why we need this variation. I have read and reviewed the variation and I'm happy with it as it stands. I have no amendments to suggest.

Regards
9(2)(a)

From: 9(2)(a) @ird.govt.nz>
Sent: Friday, 6 March 2020 3:42 PM
To: 9(2)(a) @msd.govt.nz>
Cc: 9(2)(a) @ird.govt.nz>
Subject: Variation to IR/MSD Common Debtor Research MoU

[IN CONFIDENCE]

Hi, 9(2)(a). I hope you're well.

My apologies, a miscommunication on my part meant that I'm sending you this a couple of days later than intended.

The attached Variation document adds a new clause 5A ("Create Sample for Common Debtor Pilot") to the current Common Debtors Research and Analysis MoU (attached).

I'm assuming that you are aware of the need to create the sample but if not please give me a call on Monday morning.

Looking forward to hearing from you with any feedback, suggested amendments or questions that you may have.

Kind regards, 9(2)(a)

9(2)(a) | Senior Solicitor
Corporate Legal | Inland Revenue
Level 9 | 55 Featherston Street | PO Box 2198 | Wellington
9(2)(a) | T. +64 9(2)(a)
E. 9(2)(a) @ird.govt.nz | W. www.ird.govt.nz

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RELEASED
OFFICIAL INFORMATION

9(2)(a)

From: 9(2)(a) on behalf of 9(2)(a) @ird.govt.nz>
Sent: Friday, 13 March 2020 5:49 pm
To: 9(2)(a)
Subject: Fortnightly Initiative Update - Common Debtors Pilot - 17 February - 6 March 2020

[IN CONFIDENCE]

Hi All,

9(2)(a)

NB: The IR-MSD Support Team are following our respective agencies advice in relation to Covid-19. At this stage, pilot research and activities are continuing as planned.

Enjoy the weekend.

Ngā mihi

9(2)(a)

9(2)(a), Relationship and Delivery Lead, Families Customer Segment, Inland Revenue
T. 64 9(2)(a) | X. 9(2)(a) | M. 9(2)(a)
E. 9(2)(a) @ird.govt.nz

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<<

12.03.2020 Fortnightly Initiative Update - Common Debtors Pilot.pdf (105.9KB)

(105.9KB)

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Fortnightly Progress Report IR & MSD Common Debtors Initiative

To	9(2)(a) [redacted], Families Segment Lead – Inland Revenue Warren Hudson, General Manager, Integrity and Debt - Ministry of Social Development
CC	9(2)(a) [redacted], Relationship & Delivery Lead – Inland Revenue
From	9(2)(a) [redacted], Delivery & Communications Analyst – Inland Revenue
Date	12 March 2020
Initiative Key Objectives	Improved kotahitanga to better support customers who owe money to both IR child support and MSD. This initiative will reduce customer effort, improve the sustainability of repayments, increase the accuracy of customer entitlements and enable us to grant relief that reduces financial hardship for vulnerable New Zealanders.
Reporting Period	Progress report for period 17 February – 6 March 2020 (this report covers a three-week window to include updates from our face-to-face workshops in Christchurch)

Summary

Memorandums of Understanding

A variation was required to the first Memorandum of Understanding (MoU). This variation enables IR's data analytics team to begin identifying potential pilot customers prior to the completion of the second MoU. The variation is complete and has been sent to you as sponsors for sign off. Work will now resume on the second MoU which is still expected to be completed by 31 March 2020.

Customer research

Customer recruitment for testing is underway with final safety and scope checks being conducted by the pilot team (prior to customers being contacted). The customer research interviews are scheduled to take place in Auckland, Wellington and Christchurch during the week commencing 23 March 2020.

Pilot team recruitment/training

Both IR and MSD recruitment for the pilot delivery team has now been completed. Our pilot team leads are thrilled with the selected staff who are expected to begin joint training from 16 March 2020. Joint training will include reinforcing privacy requirements and enhancing customer and cultural awareness. Charlie Howe, MSD's Director Māori and Pacific Communities, will take the team through MSD's Te Pae Tata (Māori Strategy and Action Plan) and its Pacific Prosperity strategy to support improving outcomes for Māori and Pacific clients, whānau and communities.

Pilot team planning

The pilot held face-to-face workshops at Russley Road, Christchurch from 2 – 4 March 2020 to finalise key pilot processes.

The pilot team have agreed to operate two full days per week (Wednesday and Thursday) in order to balance BAU roster commitments and pilot planning. This information is being communicated to appropriate leaders and those responsible for managing rostering. Upfront voice messaging and support processes for customers who attempt to contact the team outside of these hours are being developed.

Shared Platform/Collaboration Tools




Several options to enable conference calling between IR and MSD have been explored. Five options have been identified and these are currently being prioritised based on ease-of-use and sustainability. The team expect to have a final decision on the most suitable process by 14 March 2020.




Due to information security concerns, a shared tool/platform cannot currently be made available to the pilot team. As a result, pilot information will need to be manually exchanged between IR and MSD which will increase the time spent on administration for the pilot team.









The team have documented processes to safely share information manually, such as workflow and customer communications, to enable the pilot. SEEMail (which secures email traffic over the internet between participating New Zealand public sector organisations) will be the default system used to exchange the required information.

Initiative Indicators

Key

	Initiative tracking to plan on all areas.
	Initiative tracking to plan mostly, however an area has fallen behind or needs noting
	Initiative falling behind in more than one area

Key Progress Indicators	Status			Comments
Areas				
Scope				
Schedule				
Resources				Determining the best system to facilitate conference calls is a priority. Covid-19 may trigger the re-deployment of MSD pilot staff to other work (this is being managed as an ongoing risk)
Major Risks/Issues				
Impact on other projects				
Impact on IR/MSD staff (Impact Management)				

Milestone/Deliverable	Forecast Completion Date	Actual Completion Date	Status			Comments
						
All pilot team recruitment completed	21 February 2020	18 February 2020				Later than anticipated due to one interviewee delaying her interview.
Common Debtor Data Match completed	2 March 2020	10 February 2020				
Sampling completed for pilot research	2 March 2020	4 March 2020				Data provided slightly later than anticipated with no negative impact on customer testing.
Customer testing/pilot research commences	23 March 2020					
Joint training commences	16 March 2020					This training has been delayed in line with the completion of recruitment with no negative impact.

Key Risks	Mitigation / Action
New Risks identified	
Potential for deceased customers in customer select	Reviewing accounts to identify potential deceased customers (where death has not yet been confirmed) has been built into the pre-contact select process for customer research and pilot participation.
Highest Current Risks	
The pilot team does not have suitable technology to enable three-way calling between IR, MSD and customers	Several options to enable conference calling between IR and MSD have been explored. Five options have been identified and these are currently being prioritised based on ease-of-use and sustainability. The preferred option is expected to be agreed by 14 March 2020 which will close this risk.

IN CONFIDENCE

9(2)(a)

From: 9(2)(a)
Sent: Wednesday, 25 March 2020 6:47 pm
To: 9(2)(a)
Subject: Re: Common Customer pilot update

Hi
Thanks for that
Yes you too, stay well
Xx

Sent from my iPhone

On 25/03/2020, at 6:37 PM, Michelle Sargentina wrote:

[IN CONFIDENCE]

Hi 9(2)(a),

Yes I can confirm that everything has been pushed out 😞

Take care and stay well.

9(2)(a)

From: 9(2)(a)

Sent: Wednesday, 25 March 2020 1:36 PM

To: 9(2)(a)

Subject: Re: Common Customer pilot update

Hi 9(2)(a)

Thanks for that - it makes total sense! Can I also confirm that the video conference on privacy is also cancelled? I am bit distracted by Covid 19 stuff so would have to pull out anyway.

Thanks!

9(2)(a)

Sent from my iPhone

On 25/03/2020, at 12:48 PM, 9(2)(a)
9(2)(a) @ird.govt.nz> wrote:

[IN CONFIDENCE]

Hi everyone,

With recent developments surrounding Covid-19, our sponsors have agreed to postpone the start date of the Common Debtor Pilot by three months, at this stage. This will enable both Inland Revenue and the Ministry of Social Development to free up staff to support our customers / clients at this difficult time.

We remain committed to the delivery of this important initiative. Some of our core pilot team have been temporarily redeployed to assist with other tasks. As capacity allows, we will continue establishing systems and processes to support the pilot so that when the time is right, we can commence.

Please do not hesitate to contact me if you would like any further information.

Stay safe and well.

Ngā mihi

9(2)(a)

9(2)(a) [REDACTED], Relationship and Delivery Lead, Families Customer Segment,
Inland Revenue
T. 64 9(2)(a) [REDACTED] | X. 9(2)(a) [REDACTED] | M. 9(2)(a) [REDACTED]
E. 9(2)(a) [REDACTED] @ird.govt.nz

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Inland Revenue
Te Tari Taake



**MINISTRY OF
SOCIAL DEVELOPMENT**
Te Manatū Whakahiato Ora

Inland Revenue

and

the Ministry of Social Development

**VARIATION RELATING TO THE MEMORANDUM OF UNDERSTANDING
BETWEEN INLAND REVENUE AND THE MINISTRY OF SOCIAL DEVELOPMENT
UNDER PART 9A OF THE PRIVACY ACT 1993 AND SECTION 18E(2) OF THE
TAX ADMINISTRATION ACT 1994**

REGARDING RESEARCH AND ANALYSIS IN RELATION TO COMMON DEBTORS

March 2020

IN CONFIDENCE

VARIATION dated

2020

Between Inland Revenue (**Inland Revenue**)

And The Ministry of Social Development (**MSD**)

BACKGROUND

- A. Inland Revenue and MSD are parties to a Memorandum of Understanding (MOU) under which they have exchanged information for the purpose of researching, analysing and gaining understanding of the nature and causes of debt in their common debtors (and how to engage with such debtors), dated 28 November 2019.
- B. Inland Revenue and MSD intend in April 2020 to execute a memorandum of understanding that sets out the processes, arrangements and conditions required for the Parties' Common Debtor Pilot (the Pilot) to engage with customers in the manner to be set out in that memorandum.
- C. The work necessary to initiate the planned benefits of the Pilot will require a Common Debtor customer sample of approximately 1500 persons (the sample). The relevant business unit in Inland Revenue has stated that the preparation of the sample will take up to three weeks. The sample may not be prepared without the written agreement of the Parties to such a use of the relevant information.
- D. The Parties are well advanced in the process of planning the processes and arrangements for the Pilot Project. However, neither those plans nor the draft memorandum of understanding have yet been finalised in detail.
- E. The Parties seek to be able to begin work on the Pilot as soon as the memorandum of understanding for the Pilot is executed. However, the Parties would be unable to begin effective work until the sample has been created. Therefore, in order to avoid a two to three week delay in the commencement of effective work on the Pilot (after the Memorandum is executed) the Parties wish to record their agreement that IR may create the sample in advance of (and in preparation for) the execution of the memorandum.
- F. Notwithstanding any clauses in this MOU to the contrary, the Parties agree that IR may prepare a sample schedule from the information available to the Parties under this MoU of up to 1500 persons who are common debtor customers of the Parties.
- H. The Parties consider that the creation of the sample by Inland Revenue pursuant to this Variation (with future use and disclosure to be recorded in a memorandum between the Parties) is authorised pursuant to clauses 2(a) to 2(c) of the AISA.

COVENANTS

1. Definitions and Interpretation

IN CONFIDENCE

- 1.1 **Definitions:** In this Variation, including the Background, terms defined in the MOU have the same meaning where used in this Variation and the following terms have the following meanings unless the context requires otherwise;

MOU means the Memorandum of Understanding under which the Parties have exchanged information for the purpose of researching, analysing and gaining understanding of the nature and causes of debt in their common debtors (and how to engage with such debtors), dated 28 November 2019

Variation means this variation, including any Schedule or Annexure to it.

- 1.2 **Interpretation:** In this Variation, unless the context otherwise requires:

- (a) a reference to a party means a party to this Variation;
- (b) the singular includes the plural and vice versa;
- (c) a reference to a document (however described and including this Variation) includes the document as amended or replaced from time to time;
- (d) headings are for convenience only and have no effect on construction and interpretation;
- (e) a reference to a clause or a Schedule means a clause of, or a Schedule to, this Agreement;
- (f) wherever the words 'includes' or 'including' are used, they are deemed to be followed by the words 'without limitation';
- (g) a reference to any legislation includes any amendment to, or replacement of, that legislation and any subordinate legislation made under it.

2. VARIATION


- 2.1 **Variation of terms:** The parties agree to vary the Memorandum as set out in the Annexure with effect on and from the Effective Date.



- 2.2 **Terms remain in effect:** Except as expressly varied in this Variation, the terms contained in the Memorandum continue and remain in full force and effect.

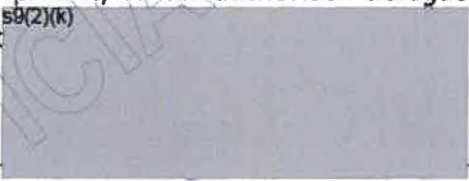

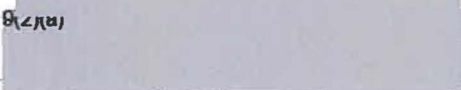
3. COUNTERPARTS

- 3.1 **Counterparts:** This Variation may be signed in any number of counterparts (including facsimile copies) all of which, when taken together, will constitute one and the same variation. A party may enter into this Variation by signing any counterpart.

EXECUTED:

The Commissioner of Inland Revenue, or her authorised delegate	
Signature:	
Name:	Sue Gillies 12/3/20 . Sue Gillies
Position:	Segment Management Lead - Families
Date:	12/3/20

Witnessed by:	
Name:	
Date:	12.03.2020

The Chief Executive of the Ministry of Social Development, or her authorised delegate	
Signature:	
Name:	Warren Hudson
Position:	General Manager - Integrity and Debt
Date:	10/3/20
Witnessed by:	
Name:	
Date:	10/3/20

ANNEXURE

The Memorandum is amended as set out below. In the event of any inconsistency or contradiction between the Memorandum and the terms set out in this Annexure, the terms set out in this Annexure apply.

1. New Clause 5A to Create Sample for Common Debtor Pilot Project

A new clause 5A is added to the MOU as follows:

5A. Creation of Sample for Common Debtor Pilot Project

- 5A.1 IR may create from any information made available under this MoU a sample of the common debtor customers of the Parties. The maximum number of persons in the sample shall be 1500.
- 5A.2 The sample created under clause 5A.1 shall be retained securely by IR and may be used for no other purpose than as stated in a memorandum of understanding (to be executed on a future date) that sets out the processes, arrangements and conditions required for the Parties' Common Debtor Pilot Project. For the sake of clarity, the sample may not be added (in whole or part) to any operational database unless authorised by such a memorandum.
- 5A.3 If the sample is not used in a manner authorised under a memorandum of understanding (as set out in clause 5A.2) the sample shall be destroyed in accordance with clause 9 of this MoU (regarding Destruction of Information). For the sake of clarity, if the sample is used in accordance with the requirements of clause 5A.2 then clause 9 shall not apply to the sample.

9(2)(a)

From: 9(2)(a) @ird.govt.nz>
Sent: Monday, 11 May 2020 8:05 am
To: 9(2)(a)
Cc: 9(2)(a)
Subject: RE: CONFIDENTIAL (possibly BUDGET SENSITIVE - we're not sure so act as if it is) - supporting non-residents (proposed MBIE initiative)

[IN CONFIDENCE]

Morning 9(2)(a),

Thank you for the heads up regarding this. I'll liaise with 9(2)(a) to find out exactly what arrangements are in place (including any operational arrangements described in the MoU).

From a legal/technical perspective, will this be classed as an additional component of the wage subsidy group (see table below)? Just thinking about the legal definition in our Covid19 MoU '*subsidy - a subsidy that is available to an affected person or entity on application to MSD if they have been affected by Covid19 including but not limited to a wage subsidy for their employee(s)*' Particularly in terms of our people's access and use of this information. Also, if it's going through cabinet this week, not yet enacted?

Original Wages Subsidy
Modified Wages Subsidy
Original Isolation Leave Payments
Essential Workers Payments
New Leave Payment

Out of scope

Thanks 9(2)(a)

From: 9(2)(a)
Sent: Friday, 8 May 2020 4:40 PM
To: 9(2)(a)
Cc: 9(2)(a)

Subject: CONFIDENTIAL (possibly BUDGET SENSITIVE - we're not sure so act as if it is) - supporting non-residents (proposed MBIE initiative)

Hi 9(2)(a)

I'm not sure if IR (except for maybe IT) is aware of this yet but there is a proposal to provide some level of support to non-residents - the exact details about eligibility are still tbc but roughly speaking, the cohort may be those who are entitled to work in NZ but who have lost their jobs because of Covid. MBIE is the lead agency on the project (wearing its immigration hat) but MSD would act as payment agent because MBIE isn't equipped to do so.

As part of that, we understand that MSD would be required to pass on payment records to IR for tax purposes - whether that would be acting as agent for MBIE under whatever legal authority MBIE has, or whether it would be on the basis of applicant consent is still tbc. Either way, though, IR could be getting a bunch of information from us for this new cohort of people.

We're **not** proposing that we do a separate MOU with IR for this - it's really something that should be anticipated in the MOU with MBIE (which 9(2)(a) is working on) since it's a responsibility that MSD is taking on. No point overcomplicating things.

But we figured that (1) you'd need to know the payment info is coming and (2) you'd need to be confident it's the right information coming to you in the right way and in the right format. Minor stuff like that...

I think the latter point will have been resolved - 9(2)(a) on our side has been talking to 9(2)(a) on your side to ensure that IR's processes can cope with an extra file. So there shouldn't be problems at the technical end. But 9(2)(a) and I thought that you'd probably want to check how the obligations to pass information to IR are described in the MOU, and also make sure that the relevant policy people etc are clued up on your side about what to do with this info when it arrives.

They might already be aware of it of course, (and it might involve no changes at all or tax complications from IR's perspective), but as far as we're aware, MBIE hasn't discussed it with IR yet, and nor has anyone but 9(2)(a) from our side. So we didn't want to leave this to chance!

Cabinet has not yet approved the support package proposal - so please treat this strictly in confidence. We just wanted to start to talk to IR now - if it goes through Cabinet next week (which is a possibility), it would be on a fast track to go live, ie 10 days from approval.

Happy to discuss, and we'd include our colleague 9(2)(a) at MBIE in the conversation. Maybe once the small business loan deets are sorted.

Have a great weekend!

Ngā mihi

9(2)(a)

Manager | Information Privacy & Sharing

Desk to desk: 9(2)(a)

DDI: 9(2)(a)

Mobile: 9(2)(a)

Ministry of Social Development

Manaaki Tangata Manaaki Whānau

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9(2)(a)

From: 9(2)(a)@ird.govt.nz
Sent: Thursday, 26 March 2020 12:56 pm
To: Warren Hudson; 9(2)(a)
Cc: 9(2)(a)
Subject: RE: Inland Revenue's Business Transformation - COVID19 Update

[IN CONFIDENCE]

Hello MSD team

I hope you are all keeping well, taking care, being kind and staying safe in this strange new world – day 1 of our lockdown. A brief update from Inland Revenue and upcoming release in Easter.

In these extraordinary circumstances, ensuring people get their entitlements, including their Covid-19 relief, is an essential service and Inland Revenue's top priority.

We are now required to operate very differently, including how we work with you. Our phone services will be severely limited and the only effective way to contact us, will be online and through myIR.

Within Inland Revenue, all front office services in all localities are now closed and all of our staff, except a small number of special exceptions, will be working from home.

Inland Revenue remains committed to implementing the latest round of our transformation changes in April. Maintaining the pace of IR's transformation is important and any delay increases the risk that we won't be able to meet customers' needs at this difficult time. By upgrading our systems in line with our current plan, we increase our agility to respond swiftly to situations such as Covid-19 which gives the Government more flexibility to help New Zealanders.

Please be assured that the people who work at Inland Revenue will be doing their very best to make sure all New Zealanders get what they need as soon as they need it. That is our top priority.

We will be providing more detail on things you need to know as this situation develops. You can find current information at ird.govt.nz/covid19

Filing Employment Information (for payroll)

For March 2020 we've received 280k Employment Information submissions from 110k employers through Gateway or File Upload. We know it's challenging for you in the current environment to continue to file Employment Information each payday. However, filing Employment Information ensures information about employees is up to date and accurate and will also help support any application for the Government's recently announced wage subsidy (if required) given the current context of COVID-19.

This information will also assist as the end of the tax year is closing – and IR will be identifying refunds (in particular) which can be sent to customers to assist during this difficult time.

Any questions let me know, stay safe, regards 9(2)(a)

9(2)(a) | BT Account Manager Government | Business Transformation | Inland Revenue
T. 64 9(2)(a) | M. 9(2)(a) | L11 Asteron House | 55 Featherston Street Wellington

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RELEASED UNDER THE
OFFICIAL INFORMATION ACT

9(2)(a)

From: 9(2)(a) @ird.govt.nz
Sent: Monday, 2 March 2020 2:54 pm
To: Warren Hudson; 9(2)(a)
Cc: 9(2)(a)
Subject: Inland Revenue's Business Transformation - Update on progress towards Release 4 in April 2020

[IN CONFIDENCE]

Hi all

Our recent readiness checks show we're on track for our [fourth transformation release in April](#), with preparation activities underway ahead of a final decision to proceed, which will be made in early April.

These checks include our third and final dress rehearsal, where we will test our timing and sequencing to make sure we can do what we need to within the dates we've specified for our closedown.

- The [closedown dates](#) we're working to see:
 - Our core systems, along with our front of office counters and contact centres shut [from 3pm Thursday 9 April 2020](#).
 - Systems and services back open for customers at [8am Thursday 16 April](#).
- This means we'll be [closed](#) to the public for just [two working days following the Easter public holidays](#).

What this means for you

- 9(2)(a) from our Technical Team has been working with the appropriate MSD staff to understand the impact of the cutover window on various shares and processes that occur prior, during and after IR completes the Release 4 deployment and is live from 8am Thursday 16 April to customers. A detailed cutover approach for Child Support and Working for Families has been developed and close to being finalised.
- If you have any concerns or questions about the cutover window and impact to MSD then please liaise with 9(2)(a). 9(2)(a) will pass on your messages to us otherwise we are due to have a joint meeting at MSD again sometime in March to provide an update on our preparations for Release 4. Come and join us!
- MSD has asked after shares not impacted by our cutover window and IR's confidence level that the change will not affect other shares. IR is conducting regression testing of all other MSD shares to ensure they will continue to operate as they should post R4. The regression testing will be [internal to IR only](#), where we will test across the Release 4 code to ensure all is as expected. For those who have raised this, I will provide an update on this in due course.
- Note that during this time our call centres, parts of our website including myIR Secure Online Services, and customer service counters in all of our offices will be closed.

Key changes you'll see from Thursday 16 April

- When we re-open on the morning of Thursday 16 April, customers will be able to take advantage of a number of changes, such as:
 - enhancements to our online services, specifically myIR, including improved navigation, more information available online and in one place, and more self-service options

- better services for Student loan and KiwiSaver customers, along with some changes for our Working for Families customers
- some enhanced Gateway Services capability
- a reduction in the effort for employers, with a new employee onboarding process. Information sent to employers will be more streamlined and consolidated.

Who to contact

If you have any queries about our preparations for our fourth transformation release in relation to the deployment then please contact 9(2)(a), for all other matters myself.

Kind regards 9(2)(a)

9(2)(a) | BT Account Manager Government | Business Transformation | Inland Revenue
T. 64 9(2)(a) 96 (X. 9(2)(a)) | M. 9(2)(a) | L11 Asteron House | 55 Featherston Street Wellington
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9(2)(a)

From: 9(2)(a)
Sent: Thursday, 16 April 2020 1:24 pm
To: 9(2)(a) @ird.govt.nz
Subject: FW: Signed clean copy attached - thanks 9(2)(a)
Attachments: 16042020115950-0001.pdf

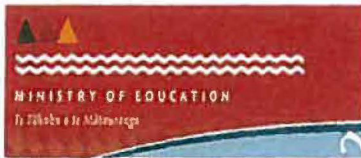
Signed copy attached

Thanks
9(2)(a)

-----Original Message-----

From: 9(2)(a) @msd.govt.nz>
Sent: Thursday, 16 April 2020 12:01 PM
To: 9(2)(a) @msd.govt.nz>
Subject: Signed clean copy attached - thanks 9(2)(a)

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OFFICIAL INFORMATION ACT



Stats **NZ**
Tatauranga Aotearoa



MINISTRY OF SOCIAL DEVELOPMENT
Te Manatū Whakahiato Ora

VARIATION

OF

MEMORANDUM OF UNDERSTANDING

AGREEMENT FOR THE

**INTEGRATED DATASET ON STUDENT LOAN BORROWERS AND
STUDENT ALLOWANCE RECIPIENTS**

April 2020

1. Parties

Inland Revenue (IR)
Ministry of Education (MoE)
Ministry of Social Development (MSD)
Statistics New Zealand (Statistics NZ)

2. Purpose of this Variation

This Variation varies the Memorandum of Understanding – Agreement for the Integrated Dataset on Student Loan Borrowers and Student Allowance Recipients that currently exists between Statistics NZ, Inland Revenue, Ministry of Education, and the Ministry of Social Development dated September 2006 (the '**Agreement**').

Clause 13.3 of the Agreement provides that the Agreement can be amended at any time by agreement in writing between all of the parties. This Variation sets out the changes agreed, including confirming:

- the specification for Statistics NZ to maintain and annually update the integrated dataset on student loan borrowers and student allowances recipients; and
- each agency's data to be supplied within this process.

3. Variation

3.1 The parties agree to vary the Agreement as set out in the Annexure of this Variation with effect on and from the date this Variation is signed by all parties.

3.2 Except as expressly varied in this Variation, the terms contained in the Agreement continue and remain in full force and effect.

4. Miscellaneous

4.1 This Variation may be signed in any number of counterparts (including electronic copies) all of which, when taken together, will constitute one and the same. A party may enter into this Variation by signing any counterpart.

Signatories

Signed for and on behalf of **Inland Revenue**

..... Date / /
9(2)(a)
Group Lead – Individuals, Customer & Compliance Services - Individuals
Inland Revenue

Signed for and on behalf of **The Ministry of Education**

..... Date / /
9(2)(a) | Senior Manager, Tertiary Sector Performance Analysis
The Ministry of Education

Signed for and on behalf of **The Ministry of Social Development**

s9(2)(k)
..... Date 16 / 04 / 20
Simone Pringle
General Manager Centralised Services
The Ministry of Social Development

Signed for and on behalf of **Statistics New Zealand**

..... Date / /
9(2)(a)
Senior Manager, Integrated data
Statistics New Zealand

ANNEXURE

The Agreement is amended as set out below. In the event of any inconsistency or contradiction between the Agreement and the terms set out in this Annexure, the terms set out in this Annexure shall prevail.

1. Clause 13.4 – Review of Agreement

Clause 13.4 following section of the Agreement is deleted:

"13.4 A review of the Agreement will be made in 2022"

2. Appendix 4 – Timetable for Annual Updates

Appendix 4 of the Agreement is deleted and replaced with the following:

Appendix 4 – Timetable for Annual Updates

Date Due	Task	Agency Responsible
1 st Monday of March	Debrief meeting to go over last year's release, discussing data specifications for coming release	Stats NZ, MoE, MSD, IR
1 st Monday of April	Data request sent to MoE for tertiary data test supply with validation checks sheet	Stats NZ
1 st Monday of May	Final MoE-tertiary validated data files and signed final Validation Checks sheet provided to Stats NZ (excluding completions data)	MoE
1 st Monday -30 May	Stats NZ data validation on final MoE-Tertiary data	Stats NZ
Last Friday of May	Data specifications agreed and signed off	Stats NZ, MoE, MSD, IR
2 nd Monday of June	Data request sent to source agencies for test supply with Validation Checks sheet	Stats NZ
6-17 July	Validated Test data files and signed Validation Checks sheet provided to Stats NZ	MoE, MSD, IR
6-24 July	Stats NZ data validation on test data	Stats NZ
1 st Monday June	MoE final data loaded into the IDI	Stats NZ
1 st Monday August	Final validated data files and signed final Validation Checks sheet provided to Stats NZ	MoE, MSD, IR
3-31 August	Stats NZ data validation on final data	Stats NZ
1 st Monday October	MSD and IRD final data loaded into the IDI and linking completed	Stats NZ
1 st Monday of November	Linked data released to the data lab	Stats NZ

3. Appendix 5 – Data Supply Specifications

Appendix 5 of the Agreement is deleted and replaced with the following:

Appendix 5 - Data Supply Specifications

1. Ministry of Education

1.1 Data Dictionary or User Guide

1.2 Metadata

1.3 Changes Document

1.4 SDR Manual

1.5 NSI Data

Variable	Primary Key Field	Data Type	Length	Blanks Allowed
nsn	Yes	Integer		No
master_nsn		Integer		No
surname		Char	32	No
forename1		Char	32	No
forename2		Char	32	Yes
forename3		Char	32	Yes
gender		Char	1	No
date_of_birth		dd/mm/yyyy	10	No
name_dob_verification		Char	1	No
student_status		Char	1	No

1.6 Completions Data

Variable	Primary Key Field	Data Type	Length	Blanks Allowed
year	Yes	Integer		No
instit	Yes	Char	4	No
id	Yes	Char	10	No
qual	Yes	Char	6	No
nsn		Integer		Yes
sn		Integer		No
main_1		Char	4	Yes
main_2		Char	4	Yes
main_3		Char	4	Yes
mf1		Char	6	Yes
mf2		Char	6	Yes
mf3		Char	6	Yes
mf4		Char	6	Yes
mf5		Char	6	Yes
NZQF_levelq		Char	2	Yes
qual nzscd		Char	6	Yes
qacc		Char	2	No

1.7 Qualification Enrolments Data

Variable	Primary Key Field	Data Type	Length	Blanks Allowed
year_nbr	Yes	Integer		No
provider_code	Yes	char	4	No
student_id_code	Yes	varchar	10	No
qual_code	Yes	char	6	No
nsn_nbr		Integer		Yes
tsec_nbr		Integer		Yes
qual_type_code		char	1	No
attendance_type_code		char	1	Yes
country_code		char	3	Yes
slf_rprtd_country_code		char	3	Yes
last_school_decile_code		char	2	Yes
disability_code		char	1	Yes
disability_access_code		char	1	Yes
birth_date_text		char	10	Yes
slf_rprtd_birth_date_txt		char	10	Yes
efts_consumed_nbr		varchar	10	Yes
efts_course_factor_nbr		varchar	10	Yes
efts_prog_nbr		float		Yes
efts_prog_years_nbr		float		Yes
ethnic1_code		varchar	6	Yes
ethnic2_code		varchar	6	Yes
ethnic3_code		varchar	6	Yes
completion_finish_ind		char	1	Yes
prog_start_date_text		char	10	Yes
first_tertiary_year_nbr		Integer		Yes
funding_srce_code		char	2	No
sex_code		char	1	No
slf_rprtd_sex_code		char	1	No
ird_nbr		Integer		Yes
is_domestic_ind		char	1	Yes
slf_rprtd_domestic_ind		char	1	Yes
iscled_level_code		char	2	Yes
iwi1_code		varchar	6	Yes
iwi2_code		varchar	6	Yes
iwi3_code		varchar	6	Yes
nature_code		char	1	No
prog_end_date_text		char	10	Yes
name_id_code		char	5	Yes

qual_level_code		char	2	Yes
prog_nzsced_code		char	6	Yes
prior_activity_code		char	2	Yes
qacc_code		char	2	No
residency_status_code		char	1	Yes
slf_rprtd_residency_code		char	1	Yes
last_school_region_code		char	2	Yes
last_school_nbr		Integer		Yes
highest_sec_qual_code		char	2	Yes
study_region_code		char	2	Yes
study_ta_code		char	3	Yes
study_type_code		char	1	Yes
slf_rprtd_study_typ_code		char	1	Yes
subsector_code		char	1	No
last_school_year_nbr		Integer		Yes
Fees_free_eligible		Char	1	Yes
Total_fee_domestic		Float	8	Yes

1.8 Course Enrolments Data

Field Name	Primary Key	Type	Length	Blanks Allowed
year	Yes	Integer		No
instit	Yes	char	4	No
id	Yes	varchar	10	No
qual	Yes	char	6	No
course	Yes	varchar	20	No
srt_date	Yes	char	10	No
end_date		char	10	Yes
wtd_date		char	10	Yes
nsn		Integer		Yes
sn		Integer		Yes
qual_type		char	1	Yes
age		Integer		Yes
assist		char	2	Yes
attend		char	1	Yes
category		char	2	Yes
citizen		char	3	Yes
_citizen		char	3	Yes
class		char	4	Yes
complete		char	1	Yes
complete_applies		char	1	Yes
credit		decimal	13,2	Yes

decile		char	2	Yes
disable		char	1	Yes
dis_access		char	1	Yes
dob		char	10	Yes
_dob		char	10	Yes
eftsconsumed		decimal	6,4	Yes
eftsfactor		decimal	6,4	Yes
eftsprg		decimal	6,4	Yes
eftsyr		decimal	6,4	Yes
ethnic1		varchar	6	Yes
ethnic2		varchar	6	Yes
ethnic3		varchar	6	Yes
exempt_indicator		Integer		Yes
fee		decimal	13,2	Yes
fee_cccosts		decimal	13,2	Yes
fee_foreignc		decimal	13,2	Yes
fee_foreigns		decimal	13,2	Yes
fee_max_exempt		decimal	13,2	Yes
finish		char	1	Yes
first_yr		Integer		Yes
funding		char	2	Yes
gender		char	1	Yes
_gender		char	1	Yes
internet		Integer		Yes
is_domestic		char	1	Yes
_is_domestic		char	1	Yes
iscd_level		char	2	Yes
iwi1		char	4	Yes
iwi2		char	4	Yes
iwi3		char	4	Yes
I_nature		char	1	Yes
lIn_indicator		char	1	Yes
location_code		char	2	Yes
nameid		char	5	Yes
register_levelc		char	2	Yes
register_levelq		char	2	Yes
nzscdc		char	6	Yes
nzscdq		char	6	Yes
pbrf_crs_comp_yr		Integer		Yes
pbrf_eligible		char	1	Yes
pbrf_vrf		float		Yes
post_code_perm		char	4	Yes
post_code_term		char	4	Yes
prior_a		char	2	Yes
qacc		char	2	Yes

residency		char	1	Yes
_residency		char	1	Yes
s_school		Integer		Yes
sec_qual		char	2	Yes
study_region		char	2	Yes
study_ta		char	3	Yes
study_type		char	1	Yes
_study_type		char	1	Yes
y_school		Integer		Yes

1.9 IT_Learners Data

Variable	Primary Key Field	Data Type	Length	Blanks Allowed
Year	Yes	int	4	No
Fund	Yes	char	2	No
APPR	Yes	int		Yes
ITOEduMis	Yes	int	4	Yes
PMSCourseNumber	Yes	int	15	Yes
ITRCourseNumber		int	15	Yes
Progr_type		char	10	Yes
NqfLevelCode		int		Yes
CreditValue		int		Yes
NZSCED_broad		char	50	Yes
NZSCED_narrow		char	51	Yes
NSCED_detail		char	52	Yes
L1_ANZSIC		char	50	Yes
L2_ANZSIC		char	50	Yes
L3_ANZSIC		char	50	Yes
L4_ANZSIC		char	50	Yes
Occup_dervd		varchar	256	Yes
DurationMonths		int	3	Yes
MasterNSN		int	11	No
DateOfBirth		dd/mm/yyyy		Yes
European		int		No
Maori		int		No
Asian		int		No
Pasifika		int		No
MELAA		int		No
Other		int		No
Gender		char	1	Yes
Hi_prev_qual_name		char	25	Yes
TerritorialAuthorityDescription		char	40	Yes

RegionalCouncilDescription	char	40	Yes
StartDate	dd/mm/yyyy		Yes
EndDate	dd/mm/yyyy		Yes
STMS_cnsmd	int	3,2	Yes
L1_qual	int	2	Yes
L2_qual	int	2	Yes
L3_qual	int	2	Yes
L4_qual	int	2	Yes
L5_qual	int	2	Yes
L6_qual	int	2	Yes
L7_qual	int	2	Yes
L8_qual	int	2	Yes
Quals_awarded	int	2	Yes
EQ_gain	char	2	Yes
LQ_gain	char	2	Yes
UQ_gain	char	2	Yes
Credits_awarded	int	4	Yes
L1_creds	int	4	Yes
L2_creds	int	4	Yes
L3_creds	int	4	Yes
L4_creds	int	4	Yes
L5_creds	int	4	Yes
L6_creds	int	4	Yes
L7_creds	int	4	Yes
L8_creds	int	4	Yes
Progr_Completion	char	1	Yes
Record	int		Yes

Variable	Primary Key Field	Data Type	Length	Blanks Allowed
Year	Yes	int	4	No
Fund	Yes	char	2	No
APPR	Yes	int		Yes
ITOEduMis	Yes	int	4	Yes
PMSCourseNumber	Yes	int	15	Yes
ITRCourseNumber		int	15	Yes
Progr_type		char	10	Yes
NqfLevelCode		int		Yes
CreditValue		int		Yes
NZSCED_broad		char	50	Yes
NZSCED_narrow		char	51	Yes
NSCED_detail		char	52	Yes
L1_ANZSIC		char	50	Yes

L2_ANZSIC	char	50	Yes
L3_ANZSIC	char	50	Yes
L4_ANZSIC	char	50	Yes
Occup_dervd	varchar	256	Yes
DurationMonths	int	3	Yes
MasterNSN	int	11	No
DateOfBirth	dd/mm/yyyy		Yes
European	int		No
Maori	int		No
Asian	int		No
Pasifika	int		No
MELAA	int		No
Other	int		No
Gender	char	1	Yes
Hi_prev_qual_name	char	25	Yes
TerritorialAuthorityDescription	char	40	Yes
RegionalCouncilDescription	char	40	Yes
StartDate	dd/mm/yyyy		Yes
EndDate	dd/mm/yyyy		Yes
STMS_cnsmd	int	3,2	Yes
L1_qual	int	2	Yes
L2_qual	int	2	Yes
L3_qual	int	2	Yes
L4_qual	int	2	Yes
L5_qual	int	2	Yes
L6_qual	int	2	Yes
L7_qual	int	2	Yes
L8_qual	int	2	Yes
Quals_awarded	int	2	Yes
EQ_gain	char	2	Yes
LQ_gain	char	2	Yes
UQ_gain	char	2	Yes
Credits_awarded	int	4	Yes
L1_creds	int	4	Yes
L2_creds	int	4	Yes
L3_creds	int	4	Yes
L4_creds	int	4	Yes
L5_creds	int	4	Yes
L6_creds	int	4	Yes
L7_creds	int	4	Yes
L8_creds	int	4	Yes
Progr_Completion	char	1	Yes
Record	int		Yes

2. Ministry of Social Development

2.1 Data Dictionary

2.2 Metadata

2.3 Lookup tables (codes and descriptors)

2.4 Changes Document

2.5 Control totals

2.6 Ministry of Social Development will supply Statistics New Zealand with the latest five full calendar years of data.

2.7 MSD Data:

Name	Required	Data type	Length
Year	Y	smallint	4
SWN Number	Y	int	9
IRD Number	Y	int	9
Family Name	Y	varchar	30
First Name	Y	varchar	30
Middle Name		varchar	30
Date of Birth	Y	date	ddmmmyyyy
Gender	Y	char	1
Residential status	Y	char	1
Ethnicity1		char	5
Ethnicity2		char	5
Ethnicity3		char	5
Iwi-1		varchar	4
Iwi-2		varchar	4
Iwi-3		varchar	4
Iwi-4		varchar	4
Iwi-5		varchar	4
SL Provider ID1		char	4
SL Provider ID2		char	4
SL Provider ID3		char	4
SL Provider ID4		char	4

SL Provider ID5		char	4
SL Student ID1		varchar	10
SL Student ID2		varchar	10
SL Student ID3		varchar	10
SL Student ID4		varchar	10
SL Student ID5		varchar	10
SL NSCED 1		char	6
SL NSCED 2		char	6
SL NSCED 3		char	6
SL NSCED 4		char	6
SL NSCED 5		char	6
SL Study start		date	ddmmmyyyy
SL Study end		date	ddmmmyyyy
In prison	Y	char	1
Course fees		decimal	6,2
Course related cost		decimal	6,2
Living costs		decimal	6,2
Administration fee		decimal	6,2
Repayments		decimal	6,2
Fee Refunds		decimal	6,2
Total balance		decimal	6,2
Student allowance paid		decimal	6,2
Student allowance repaid		decimal	6,2
Accommodation benefit paid		decimal	6,2
Accommodation benefit repaid		decimal	6,2
A bursary paid		decimal	6,2
A bursary repaid		decimal	6,2
B bursary paid		decimal	6,2

B bursary repaid		decimal	6,2
Study locality		varchar	60
Study city		varchar	60
Study post code		varchar	4
Postal locality		varchar	60
Postal city		varchar	60
Postal post code		varchar	4
data_present_flag	Y	tinyint	1
Allowance type		varchar	30
Over 200 weeks		char	1
Residency date		date	ddmmmyyyy
Parentally income tested		char	1
Parents income 1		decimal	6,2
Parents income-2		decimal	6,2
SA number of studying siblings		tinyint	2
SA studying siblings abatement amount		decimal	6,2
Separated parents abatement amount		decimal	6,2
Single Income Family		char	1
Student income		decimal	6,2
Weeks of allowance		smallint	2
Number of partners		tinyint	2
Total partner income		decimal	6,2
Number of studying partners		tinyint	2
Step up paid		decimal	6,2
Step up repaid		decimal	6,2
Bonded merit paid		decimal	6,2
Bonded merit repaid		decimal	6,2
Top scholar paid		decimal	6,2

Top scholar repaid		decimal	6,2
TeachNZ paid		decimal	6,2
TeachNZ repaid		decimal	6,2
SA Provider		char	4
SA Student ID1		varchar	10
SA Student ID2		varchar	10
SA Student ID3		varchar	10
SA Student ID4		varchar	10
SA Student ID5		varchar	10
SA NSCED 1		char	6
SA NSCED 2		char	6
SA NSCED 3		char	6
SA NSCED 4		char	6
SA NSCED 5		char	6
SA Study start		date	ddmmmyyyy
SA Study end		date	ddmmmyyyy
SL Study Status		char	1

3. Inland Revenue

3.1 Student Loan Validation Paper

3.2 Metadata

3.3 Lookup tables (codes and descriptors)

Look up codes and specification are to be supplied with each extract.

3.4 Changes Document

3.4.1 Change to Format of the Files

All files will be pipe delimited.

3.4.2 Change to IR3 Keypoints and PTS Information files for the CDE extract.

The IR3 Keypoints and PTS Information files will no longer be specifically provided under this Agreement.

Income related datasets will instead be sourced from information supplied by IR to Statistics NZ under a separate Statistics NZ and Inland Revenue agreement as they are deemed fit for purpose to meet the requirements of this Agreement.

Two new income files are added to the income related datasets to ensure the requirements can continue to be met under this Agreement.

The sourced datasets are:

Income Related Dataset	Comments
Autocalc Information	From 2019, the data for individual IR3 non-filers sourced from pre-populated account data will be provided in an Autocalc Information file.
IR3	From April 2020 student loan data will no longer be supplied in this file.
PTS	<p>The 2018 year will be the last tax year that the PTS is applicable for individual non-IR3 filers. Changes to historical PTS' will continue but phase out over the next 4 to 5 years.</p> <p>From 2019 year, the data for individual IR3 non-filers will be sourced from pre-populated account data (the pre-populated account being the replacement for the PTS) and will be included in the Autocalc Information file.</p>
Student Loan (SL) Assessment	This extract enables the continued supply of student loan data previously supplied via the IR3 and Autocalc Information files.

3.5 Data Dictionary

3.5.1 Income related datasets as per clause 3.4.2 will be detailed in the Data Dictionary.

3.6 IRD Data

3.6.1 Repayment deduction exemption

Variable name	Primary key	Mandatory	Format
IRD Number	Y	Y	9N
Date Start	Y	Y	DDMMMYYYY
Date End	Y		DDMMMYYYY

3.6.2 Special Deduction rate

Variable name	Primary key	Mandatory	Format
IRD Number	Y	Y	9N
Date Start	Y	Y	DDMMMYYYY
Date End	Y		DDMMMYYYY

3.6.3 Outstanding SLCIR amounts

Variable name	Primary key	Mandatory	Format
IRD Number	Y	Y	9N
Outstanding SLCIR Amount			13.2N

3.6.4 Loan transfer details

Variable name	Primary key	Mandatory	Format
IRD Number	Y	Y	9N
Academic Year	Y	Y	4N
IRD Notified Date		Y	DDMMMYYYY
Tertiary Provider Code		N	4N
Principal Xferred		Y	13.2N
Interest Xferred		Y	13.2N
Administration Fee		N	13.2N
Living Cost		N	13.2N
Living Cost Reversal		N	13.2N
Living Cost Recovered		N	13.2N
Course Related Costs		N	13.2N
Course Related Costs Reversal		N	13.2N
Loans Lending Misc		N	13.2N
Establishment Fee		N	13.2N
Fees Lending		N	13.2N
Fees Lending Refund		N	13.2N

3.6.5 Financial details

Variable Name	Primary Key	Mandatory	Format
IRD number	Y	Y	9N
Return period	Y	Y	4N
Residency status		Y	2N
Loan balance			13.2N
Interest compounded			13.2N
Interest write off amt			13.2N
Period overdue repayments			13.2N
Period capital write off			13.2N
Period capitalisation			13.2N
Period penalties amt			13.2N
Period payments amt			13.2N
SL assessment amt			13.2N
Period credit debit xfer amt			13.2N
Period refund amt			13.2N
Period offset credit amt1			13.2N
Period offset credit amt2			13.2N
Period SLBOR contribution			13.2N
Period SLCIR deduction			13.2N
Studylink payment transactions			13.2N
Total balance via process date			13.2N

3.6.6 Student loan registration

Variable Name	Primary Key	Mandatory	Format
IRD Number	Y	Y	9N
Date Start	Y	Y	DDMMYYYY
Date End		N	DDMMYYYY
Cessation Reason Code		N	6A

3.6.7 Student personal details

Variable Name	Primary Key	Mandatory	Format
IRD Number	Y	Y	9N
Date of Birth		N	DDMMMYYYY
Identification Type		N	6AN
Identification Number		N	30A
Title		N	10A
First Names		N	50A
Middle Names		N	50A
Surname		N	255A

3.6.8 Customs data

Variable Name	Primary Key	Mandatory	Format
IRD Number	Y	Y	9N
Departure Date	Y	N	DDMMMYYYY
Arrival Date	Y	N	DDMMMYYYY

3.6.9 OBB PPINZ status

Variable Name	Primary Key	Mandatory	Format
IRD Number	Y	Y	9N
Borrower Type	N	Y	3AN
Date Start	Y	Y	DDMMMYYYY
Date End	Y	N	DDMMMYYYY

3.6.10 HOL Status (Temporary Repayment Suspension)

Variable Name	Primary Key	Mandatory	Format
IRD Number	Y	Y	9N
Departure Date	Y	Y	DDMMMYYYY
Arrival Date	Y	N	DDMMMYYYY

3.6.11 Employer details

Variable Name	Primary Key	Mandatory	Format
IRD Number	Y	Y	9N
Filing Year	Y	Y	4N
Employer IRD Number	Y	Y	9N
Employers BIC Code		N	7A
Gross Earnings		N	13.2N
Tax Paid		N	13.2N

Stop date		N	DDMMMYYYY
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3.6.12 Cross reference

Variable Name	Primary Key	Mandatory	Format
Original IRD Number		Y	9N
New IRD Number		Y	9N
Date Applied		Y	DDMMMYYYY

3.6.13 URMD – over the month borrower transaction

Variable Name	Primary Key	Mandatory	Format
IRD Number	Y	Y	9N
Month	Y	N	DDMMMYYYY
Transaction Type	Y	N	1A
Amount		N	13.2N

3.6.14 URMD – end of month total loan balance

Variable Name	Primary Key	Mandatory	Format
IRD Number	Y	Y	9N
Month		N	DDMMMYYYY
Total Loan Balance		N	13.2N
Accrued Interest Writeoff		N	13.2N
Current Interest		N	13.2N

3.6.15 URMD – Customs border movement

Variable Name	Primary Key	Mandatory	Format
IRD Number	Y	Y	9N
Date Start	Y	N	DDMMMYYYY
Date Finish	Y	N	DDMMMYYYY

3.6.16 URMD – Overseas based borrower

Variable Name	Primary Key	Mandatory	Format
IRD Number	Y	Y	9N
Date Start	Y	N	DDMMMYYYY
Date Finish	Y	N	DDMMMYYYY

3.6.17 URMD - Overdue debt

Variable Name	Primary Key	Mandatory	Format
IRD Number	Y	Y	9N
Date	Y	N	DDMMMYYYY
Overdue Amount		N	13.2N

3.6.18 Overseas Based Borrower Compliance Campaigns (OBBCC) Dataset

Variable Name	Primary Key	Mandatory	Format
IRD Number	Y	Y	9N
Targeted			1A
Date of Campaign			DDMMMYYYY
Type of Campaign			29A

3.6.19 Student Loans Income Adjustments Dataset

Variable Name	Primary Key	Mandatory	Format
IRD Number	Y	Y	9N
Adjustment Period Date	Y	Y	DDMMMYYYY
Version Number			
Attributed Trust Income Amt			13.2N
Attributed Fringe Benefits Amt			13.2N
Pensions Annuities Income Amt			13.2N
PIE Income Amt			13.2N
Equalisation Scheme Income Amt			13.2N
Tax Exempt Income Amt			13.2N
PIE Allocated Income Amt			13.2N
Company Net Income Amt			13.2N
Shareholding Percentage			3N
Share Company Income Amt			13.2N
Company Dividends Recover Amt			13.2N
Company Income Net Adj Amt			13.2N
Retirement Saving Amt			13.2N
Overseas Pension Amt			13.2N
Emp Motor Vehicle Amt			13.2N
Voucher Facilities Amt			13.2N
SL Inc Eql Main Schm Ref			13.2N

3.6.20 Instalment Arrangements

Variable Name	Primary Key	Mandatory	Format
IRD Number	Y	Y	9N
Date Start	Y	N	DDMMMYYYY
Date End	Y	N	DDMMMYYYY