



23 JUN 2021

Tēnā koe

On 29 April 2021, you emailed the Ministry of Social Development (the Ministry) requesting, under the Official Information Act 1982 (the Act), the following information:

1. *Where it states it is acceptable for MSD staff to refer sick female with no transport or money who is seeking emergency accommodation to a homeless shelter (not funded by MSD).*
2. *Tell people who call for emergency food grants to contact a food bank rather than providing emergency food support.*
3. *Information regarding why MSD no longer respond to request to book face-to-face appointments, via your website, mymsd, email or by phone. I note that the call centre person stated it was COVID related, we are not in lockdown so why are appointments still not occurring.*
4. *Three times in the last month I rang the call centre and I was waiting for over 45mins at time over an hour for a representative. Please provide data on the number of calls which waited over 45-59 minutes, greater than 1 hour by month for the last 3 years. If available please provide this by region, ethnicity, age.*
5. *Information on your call back process i.e the whereby staff will only call three times and if there is no response they will no longer progress your application. Information as to why staff won't pre-book teleconferencing times or notify the client in advance that a call will be between certain hours. I note a missed call can include a staff member calling for just one ring and hanging up.*
6. *Data on how many active applications you have requesting support or a benefit that have exceeded a 8 week waiting time or longer. Please include date application received, type of benefit/support they are seeking(benefit type), region, ethnicity (Maori, Pacifica, Asian, NZ European, Other), age, gender, partnership status).*
7. *Data on the number of applications that took longer than 8 weeks to process for the last 3 years. (year, type of benefit/support they sought, region, ethnicity (Maori, Pacifica, Asian, NZ European, Other), age, gender, partnership status).*

On 25 May 2021 the Ministry wrote to you to advise we required more time to respond to your request. You were advised you would receive a response no later than 11 June 2021.

On 9 June 2021, the Ministry wrote to you again to advise that we will grant your request in part, however required more time to prepare the response. You were advised you would receive a final response by 25 June 2021.

I apologise for the delay in preparing this response for you.

Work and Income staff are expected to consistently provide a professional standard of service and I would like to assure you that staff do not set out to cause difficulties for clients. For some time now, Work and Income has been making changes and implementing more effective policies, regulations and training to our staff to ensure that people get the right support at the right time.

For clarity, I will respond to your request in turn.

1. *Where it states it is acceptable for MSD staff to refer sick female with no transport or money who is seeking emergency accommodation to a homeless shelter (not funded by MSD).*
2. *Tell people who call for emergency food grants to contact a food bank rather than providing emergency food support.*

Special Needs Grant for emergency housing is last resort assistance and can be used when a client cannot access any other accommodation adequate for their needs.

Before paying a Special Needs Grant for emergency housing, you must have considered places where the client can stay using their own resources or other sources. For example:

- staying with family and friends
- retaining their current accommodation
- staying in emergency housing not funded by the Ministry of Social Development
- accessing a place in transitional housing funded by the Ministry of Housing and Urban Development

If a client has access to other accommodation adequate for their needs in the short-term, they do not have an immediate emergency housing need and do not qualify for a Special Needs Grant for emergency housing.

To be considered to have an immediate emergency housing need, the client must not be able to access any adequate accommodation for some or all of the next 7 nights from when they applied.

In regard to food, the Ministry treats food as an essential cost and will work with clients to determine eligibility based on need and individual circumstances.

There is no specific statement to say it is acceptable for Ministry staff to refer sick females with no transport or money to a homeless shelter or a food bank. As such, these questions are refused under section 18(e) of the Act as the information requested does not exist.

The Ministry recognise the contribution of the many community organisations playing a role in supporting those in need. We also acknowledge that everyone's circumstances are different.

We absolutely understand there is a need out there and that is why we are putting large amounts of money into support food banks, food rescue and community food services.

In June 2020 the Government made available \$21 million in time limited funding to meet increased demand over two years due to the economic shocks caused by COVID-19, while developing longer term Food Secure Community plans.

Case Managers in the frontline will discuss with clients in the initial conversation with clients about their emergency need.

Case Managers are given a range of training resources, and different approaches are taken to make sure staff can support clients. This includes on the job training, online learning modules, and a reference knowledge base with policy documentation that guides decision making. Navigators and Support Services are contracted from Non-Government Organisations and bring the necessary experience and expertise to provide the service.

3. *Information regarding why MSD no longer respond to request for book face-to-face appointments, via your website, mymsd, email or by phone. I note that the call centre person stated it was COVID related, we are not in lockdown so why are appointments still not occurring.*

Currently, clients are unable to view or manage their face-to-face appointments in MyMSD. When a client's appointment is booked, they will be sent an appointment confirmation text if we have their mobile number on record. This text includes their Case Manager's name and contact number in case they need to reschedule.

From 31 May 2021, Customer Services Representative (CSR) can book appointments for clients in an active case management service and the Ministry is planning on re-introducing functionality for these clients to be able to book an appointment online later this year. All other requests for face-to-face appointments are able to be sent through the client's office to arrange an appointment.

4. *Three times in the last month I rang the call centre and I was waiting for over 45mins at time over an hour for a representative. Please provide data on the number of calls which waited over 45-59 minutes, greater than 1 hour by month for the last 3 years. If available please provide this by region, ethnicity, age.*

The Ministry routinely monitors the wait time on all calls to our contact centres. Please find **Table One** enclosed as **Appendix A** which shows the total number of calls received per month, the total number of calls that have waiting for 45 minutes or longer, and what percentage of our total callers waited for 45 minutes or longer. The figures provided are for all Ministry contact centres 0800 numbers, including Work and Income, StudyLink, Housing, and Seniors.

Please note, as the majority of calls are received from mobile callers, who don't have area codes, and not all callers choose to identify themselves, the Ministry is unable to provide callers by region, ethnicity or age. As such, these aspects are refused under section 18(g) of the Act as the information you have requested is not held by the Ministry and I have no grounds to believe that the information is held by another department or Minister of the Crown or organisation.

However, it is worth noting, region, ethnicity and age do not influence the order in which calls are answered. When one of our CSRs becomes available to answer a call, they are connected to the longest waiting caller within their appropriate skill set.

Furthermore, the Ministry acknowledges that the proportion of callers waiting longer periods have increased, particularly since the COVID-19 pandemic and the associated Alert Level-4 national lockdown in March 2020. However, this increase also corresponds to an increase in contact centre staff capability. A higher percentage of callers can now have their needs resolved by contact centre staff during the initial contact without requiring an appointment or call back. The Ministry runs an intensive contact centre recruitment programme aimed at helping to reduce wait time where possible.

5. *Information on your call back process i.e. the whereby staff will only call three times and if there is no response, they will no longer progress your application. Information as to why staff won't pre-book teleconferencing times or notify the client in advance that a call will be between certain hours. I note a missed call can include a staff member calling for just one ring and hanging up.*

In September 2019, the Ministry started rolling out the CallMe system. It is now operating throughout the Ministry and includes Work and Income, Senior Services and StudyLink. This means that rather than waiting until a CSR answers your call, you can choose to be called back, without losing your place in the queue.

Call backs are offered to clients who have been identified and verified via the Ministry's systems, when the client has called between the hours of 8am to 4pm and have waited for more than 10 minutes.

Call backs are offered for the same day and at the time the client would have waited in the queue. Should the call back go to voicemail, the CallMe system will hang up at that point.

When a client is making a request that is not able to be completed by a CSR, a call back request is sent to the region that the client lives in for a Case Manager to make contact. Clients are also able to book a specific time for a phone appointment following the approach described in our response to question four above.

The Ministry's general expectation is that case managers will make three attempts to contact a client following a call back request. We can also delay the contact if we reach the client and they tell us a specific time and date they would prefer to be contacted.

If the Ministry is unable to make contact with the client after three attempts, the call back request is closed. A new request for a call back can be made if the client still wishes to proceed with their application, which are assessed in line with the provisions.

In the spirit of being helpful, the Ministry is providing you with a copy of the Standard Operating Procedure Guide, which outlines the general provisions for call backs, and other frontline queries, which is attached to this response.

An internal Ministry email address has been withheld under section 9(2)(k) of the Act in order to reduce the possibility of staff being exposed to phishing and other scams. This is because information released under the Act may end up in the public domain, for example, on websites including the Ministry's own website.

You will note that the names of some individuals are withheld under section 9(2)(a) of the Act in order to protect the privacy of natural persons. The need to protect the privacy of these individuals outweighs any public interest in this information.

6. *Data on how many active applications you have requesting support or a benefit that have exceeded a 8 week waiting time or longer. Please include date application received, type of benefit/support they are seeking (benefit type), region, ethnicity (Maori, Pacifica, Asian, NZ European, Other), age, gender, partnership status)*
7. *Data on the number of applications that took longer than 8 weeks to process for the last 3 years. (year, type of benefit/support they sought, region, ethnicity (Maori, Pacifica, Asian, NZ European, Other), age, gender, partnership status).*

Your request for data regarding all support and benefits offered by the Ministry is very broad and substantial manual collation would be required to locate and prepare all the material within scope of your request. As such I refuse these aspects your request under section 18(f) of the Official Information Act. The greater public interest is in the effective and efficient administration of the public service.

I have considered whether the Ministry would be able to respond to your request given extra time, or the ability to charge for the information requested. I have concluded that, in either case, the Ministry's ability to undertake its work would still be prejudiced.

Please note, however, the Ministry's National Quality team is responsible for undertaking a random and independent fortnightly sample of actions processed by Ministry staff who engage with clients in order to ensure that an accurate and timely service is being provided.

Each sample is checked to ensure that the application or review has been processed in accordance with the Ministry's minimum processing standards, the relevant legislation, and, that acceptable evidence is held in a client event note to confirm that the entitlement outcome is correct.

The sample is deemed to have been actioned in a timely way when it is completed within five working days from when the last piece of information is received. Receiving all of the relevant information from the client enables a decision to then be made.

Benefit entitlement is deemed accurate when the assessment is financially correct, which means that the correct person is receiving the correct benefit, at the correct rate and from the correct date. The Ministry's minimum standard for working-age client accuracy and timeliness is 90%.

The National Quality team is committed to fostering a client-focused quality culture by providing advice, support and feedback which empowers staff to make good decisions that meet our clients' needs while still complying with legislative and business requirements.

If a client feels the Ministry has made a decision they do not agree with, they can ask for a formal review. This is called a Review of Decision which can be made within three months of the original decision. More information about the Review of Decision process can be found on the Ministry's website here: www.workandincome.govt.nz/about-work-and-income/complaints/review-of-decisions.html.

The Ministry is committed to excellent service. If we have not met this standard, you are able to make a complaint via a number of channels. More information about how

to make a complaint can be found here: www.workandincome.govt.nz/about-work-and-income/complaints/#null.

The principles and purposes of the Official Information Act 1982 under which you made your request are:

- to create greater openness and transparency about the plans, work and activities of the Government,
- to increase the ability of the public to participate in the making and administration of our laws and policies and
- to lead to greater accountability in the conduct of public affairs.

This Ministry fully supports those principles and purposes. The Ministry therefore intends to make the information contained in this letter available to the wider public. The Ministry will do this by publishing this letter on the Ministry of Social Development's website. Your personal details will be deleted, and the Ministry will not publish any information that would identify you as the person who requested the information.

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 this response to your request for information regarding the Ministry's frontline services, 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



Kay Read
Group General Manager
Client Service Delivery

Appendix A

Table One

Month	Total calls received	Total that waited 45min+	% that waited 45min+
2018	6,641,851	3,751	0.06%
January	597,062	494	0.08%
February	622,310	102	0.02%
March	596,541	66	0.01%
April	526,995	358	0.07%
May	571,927	1,192	0.21%
June	532,379	754	0.14%
July	579,695	348	0.06%
August	522,564	93	0.02%
September	475,808	31	0.01%
October	551,532	7	0.00%
November	574,513	0	0.00%
December	490,525	306	0.06%
2019	6,766,038	48,087	0.71%
January	673,260	7,183	1.07%
February	643,533	3,119	0.48%
March	604,356	445	0.07%
April	526,625	686	0.13%
May	600,549	1,626	0.27%
June	486,304	453	0.09%
July	594,777	1,903	0.32%
August	557,177	3,243	0.58%
September	505,151	2,991	0.59%
October	545,528	10,645	1.95%
November	554,667	12,803	2.31%
December	474,111	2,990	0.63%
2020	7,173,275	352,606	4.92%
January	577,217	8,646	1.50%
February	579,653	7,277	1.26%
March	678,784	97,236	14.33%
April	519,779	39,815	7.66%
May	587,653	2,693	0.46%
June	665,782	49,653	7.46%
July	635,884	48,853	7.68%
August	591,773	9,729	1.64%
September	596,758	5,673	0.95%
October	604,098	41,961	6.95%
November	588,228	30,485	5.18%

Month	Total calls received	Total that waited 45min+	% that waited 45min+
December	547,666	10,585	1.93%
2021	2,387,244	127,409	5.34%
January	583,688	32,560	5.58%
February	601,555	57,483	9.56%
March	669,076	22,060	3.30%
April	532,925	15,306	2.87%
Total period	22,968,408	531,853	2.32%



**MINISTRY OF SOCIAL
DEVELOPMENT**

TE MANATŪ WHAKAHIATO ORA

Standard Operating Procedure Guide

Q-Manager and Straight to Processing (S2P)

Version: 2.0

Release Date: 3 June 2021

This document will be updated based on system changes, and any feedback you provide.

You can submit any feedback to

s 9(2)(K)

Contents

Client Engagement Best Practice	4
What is Q-Manager?	5
Accessing Q-Manager	5
Understanding the Q-Manager Home Page.....	6
Appointment Schedule (Interviewing staff) access	6
Front of House access.....	6
View Only	7
Booking Appointments in Q-Manager	8
Appointment booking tips	10
Rescheduling Appointments	11
Cancelling Appointments.....	12
Working Across Multiple Service Centres	13
Checking in Clients.....	14
Conducting and Resulting Appointments.....	15
Check to see if client is checked in	15
After your appointment, result it in Q-Manager	15
Seminars	16
Creating a Seminar in Q-Manager	16
Editing/Cancelling a Seminar.....	16
Booking clients to seminars	17
Booking clients to seminars in a different site	17
Viewing Your Appointments	18
Managing your schedule	19
Tasks	23
Skill Profiles.....	23
StudyLink	24
Files	24
What is Straight to Processing (S2P)?	25
Accessing Straight to Processing (S2P)	25
Add Processing	26
COVID-19 Work Queues	26
Do Processing.....	27
Status	27
Your Skills	27
Your Hold/Skill Hold.....	27
Resulting a task	28

Best practice – resulting work	29
View	30
Search by Task ID/PID	30
Search by SWN	30
Search by User	30

RELEASED UNDER THE
OFFICIAL INFORMATION ACT

Client Engagement Best Practice

Q-Manager and Straight to Processing (S2P) are tools that we use to work with our clients. Q-Manager is an appointment booking tool – for one-to-one and one-to-many engagement. Straight to Processing (S2P) is a workflow tool.

Front Of House/ Connectors:

To provide the best possible service for our clients it is essential that we take care of all their needs when they present to us either in person, a task from S2P, mail or email.

- Provide first touch resolution, but remember:
 - Clients in active Case Management can be booked to their Case Managers calendar for face-to-face or phone engagement
 - If client's situation needs more time, book a call-back to S2P
- Process and complete all simple actions that present
- Ensure contact details are correct and if necessary, update them
- Advise client when they are likely to be contacted and to have their phone on
- Place clients into the right Q-Manager or S2P queue/skill, if we get this wrong then it will result in delays for the client being contacted

Receipting information - For work that comes in over the counter you need to do the following:

- Check that forms are completed in full and signed
- All supporting documents are relevant and are what is needed to complete the application or review
- Scan, save, link and create or add to CEN
- Add comments to the CEN – this could be that further information is needed and what it is, or any discussions had with the client when receipting the information
- Place into the appropriate queue for follow-up

Other methods when receipting information is to:

- Check the CENs to see if the information received relates to a hold or hardship event
- If for a hold task then link and notify the Case Manager, or move any CEN to the correct queue

Walk-in - If a client presents to the office as a walk-in for an emergency need then refer to your site standards for how these are maintained.

Adding to S2P - If a task must be added at frontline check with the client that the phone number and email address is correct.

What is Q-Manager?

Q-Manager is the appointment tool that was built to replace ABT (Appointment Booking Tool) to manage engagement in our frontline offices. It allows staff to book face-to-face appointments/seminars with clients.

Some features are still being developed to make Q-Manager more efficient.

Accessing Q-Manager

To access Q-Manager, use this [link](#).

By default, you will have limited access to Q-Manager features. A manager (someone with administration functions in Q-Manager) will need to set up your profile.

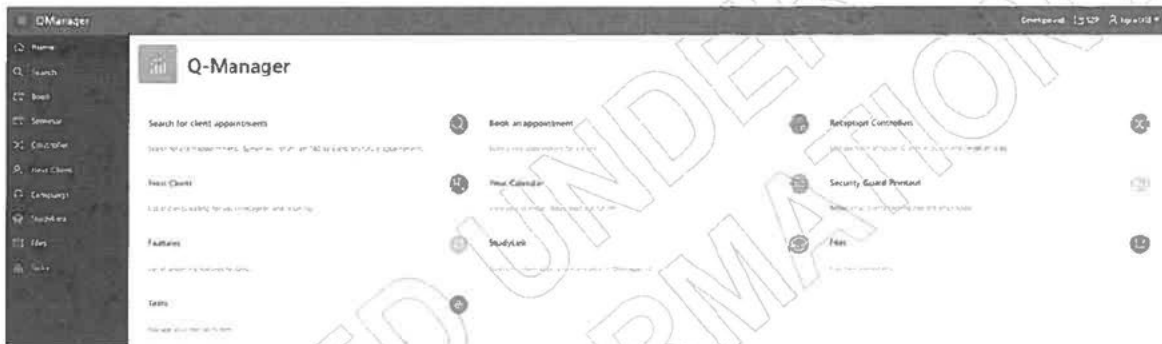
RELEASED UNDER THE
OFFICIAL INFORMATION ACT

Understanding the Q-Manager Home Page

Appointment Schedule (Interviewing staff) access

With 'Appointment Schedule' access you can:

- Book an appointment
- Search for appointments
- See clients and pull appointments ('Next Client')
- Access Reception Controller – *if needed*
- Access the Security Guard print-out for the day
- Search for Studylink information
- Access the 'Files' tab – e.g. Department of Corrections Emergency Housing referrals
- See and edit your Straight to Processing (S2P) skills



Front of House access

With 'Front of House' access you can:

- Book an appointment
- Search for appointments
- See clients and pull appointments ('Next Client')
- Access Reception Controller to manage Front of House
- Access the Security Guard print-out for the day
- Search for Studylink information
- Access the 'Files' tab – e.g. Department of Corrections Emergency Housing referrals
- See and edit their Straight to Processing (S2P) skills



View Only

With 'View Only' access you can:

- Search for appointments
- Search for Studylink information
- Access the 'Files' tab – e.g. Department of Corrections Emergency Housing referrals
- See and edit their Straight to Processing (S2P) skills



For Admin view, see the Admin section of this guide.

Booking Appointments in Q-Manager

There are a range of appointments that can be booked with clients currently:

Work Type	Work Sub-Type	Contact Type Options
Case Management	Case Management 52 Week Reapplications	Face 2 Face Phone Text Email
Employment Work Focus	Employment Work Focus	
Housing	Housing ICSM Emergency Housing Housing Assessments	
Senior	n/a	
Studylink	n/a	
Work Broker	n/a	Client F2F Client Phone Employer F2F Employer Phone

To book an appointment

1. Select 'Book' in the left-hand navigation pane. Or 'Book an appointment' from the Home page



2. Fill in the details for the appointment –

Note: Q-Manager pulls information from CMS to help you book appointments. Sometimes there may be a 1-2 second delay (a loading icon will appear) while it does this.

Participant:

- Select if this is client, or employer engagement
- When you input a client SWN, there may be a delay of a couple of seconds as Q-Manager fetches the client details:
 - Client name
 - Client contact details
 - Current service (if any)
 - Region and assigned site
 - Case Manager (if assigned)
- Check the contact phone number is correct
- If the client will bring a support person
 - If they do, select the, 'Add' button
 - When you are adding support people, if they are clients, add the full name *and* SWN so this is visible on the Guard print-out.

Participant

Contact: ☒ Client ☐ Employer

SWN: Name:

Phone #:

Service: ☒ Case Management ☐ Employment Work Focus

Support: ☐ Client intends to bring support person(s) to their appointment

Request

Staff Filter: ☒ Assigned ☐ Not Assigned

Filter Region: Show All Regions

Site: Invercargill - Southern

Work: ☒ Case Management ☐ Employment Work Focus

Staff Member: Amy Wills

Work Type: ☒ Case Management ☐ 52WeekReApp

Appointment

Contact: ☐ Text ☐ Email ☐ Phone ☒ Face 2 Face

To: ☒ Send TXT with site appointment details

Length: 30 Minutes

Dates: Friday 18/06/2021

Time: 08:30

Note: text example

Create Appointment

Request:

- If the client has an assigned Case Manager, you have an option to use, 'Staff Filter'. This will only show the Work/Work Types that the staff currently is assigned to.
- Otherwise, you can select, 'Not Assigned', and it will show all Work/Work Types. This should be used when you want to book a different Work/Work Type (for example, a Work Broker appointment)
- The region, and site for the appointment. Note: Q-Manager will by default show the site/region that **you** (the person making the booking) are assigned to. You will need to change this if you are booking in a site/region outside your own.
- The Work, and Work Type – for example, Housing ISCM, or Work Broker
- Staff member to see the client
 - On the right side under, 'Assigned', you will see the assigned Case Manager (if any)
 - If they are Case Managed, select the assigned Case Manager *first*.

Appointment:

- What the contact type is – for example, Phone or Face-to-Face
 - Select the box if you want a text sent to the client with the appointment details
- The length of the appointment
- The date and time for the appointment
- Any specific notes about the appointment – what this is for

3. Select 'Create Appointment'

Appointment booking tips

- If **no** appointment days/times appear, the schedule is not set up correctly. A Manager will need to correct this.
- If limited time slots appear, it may be that your appointment length needs to be adjusted.
- We have the option to send a reminder text to clients when booking appointments. Ensure the phone number is correct before selecting this

RELEASED UNDER THE
OFFICIAL INFORMATION ACT

Rescheduling Appointments

To reschedule an appointment, seminar or employer engagement:

1. Select **'Search'** in the left-hand navigation pane.

Search

2. Enter the client's SWN or employer's name and select **'Search'**. This will bring up the client's or employer's past and future appointments.

Type ☒ Client ☐ Employer ☐ Seminar

SWN

Search

- When searching for client appointments, you need to enter their SWN
- For employer appointments/seminars you enter the name – this does not need to be exact. **Note:** this will show *all* seminar's across the country.

3. All appointments the client has had will display. They will be listed in chronological order with the latest at the top. You will also be able to quickly identify a phone appointment or a face-to-face appointment as the icons are different.

View/Manage

Apt Date

	Appointment	07/05/2021 10:45 AM
	Appointment	16/04/2021 09:00 AM
	Appointment	29/03/2021 11:00 AM

4. Find the appointment you want to reschedule and click the icon in the **'View/Manage'** column.
5. This will bring up a **'Manage Appointment'** window. Under **'Manage'**, select **'Reschedule'**. Then click **'Update'**.
6. You then need to select, **'Book'** on the left-hand menu and follow the usual booking steps. This will close off the original appointment and re-book with the new details.

Cancelling Appointments

To cancel a future appointment:

1. Select '**Search**' in the left-hand navigation pane.
2. Enter the client's SWN or employer's name and select '**Search**'. This will bring up the client's or employer's past and future appointments.
 - When searching for client appointments, you need to enter their SWN
 - For employer appointments/seminars you enter the name – this does not need to be exact. **Note:** this will show *all* seminar's across the country.
3. All appointments the client has had will display. They will be listed in chronological order with the latest at the top. Find the appointment you want to cancel and click the icon in the '**View/Manage**' column.
4. This will bring up a 'Manage Appointment' window. Under '**Manage**', select '**Cancel**'. Then click '**Update**'.

Manage

Status

Cancel

Booked

Reschedule

Update

Working Across Multiple Service Centres

You can work across multiple sites. This needs to be set up by your Manager, or someone with Admin access in Q-Manager.



You can switch between sites at any stage.

1. Go to the **Home** screen
2. Under the main logo, select the site you want to work at from the drop-down menu.
3. You now have access to the chosen site.



Checking in Clients

If you have Front of House; Appointment Schedule or Admin access you can check-in clients in Q-Manager when they arrive for their face-to-face appointments.

1. Select 'Controller' in the left-hand navigation pane, or 'Reception Controllers' from the main page.
2. Next to 'Check in Client', hit 'Select Appointment'  Check In Client
3. Find the client's appointment in the list by searching for their appointment details or scrolling through the list.
4. To check them in, click the schedule icon:  in the 'Check In' column for their appointment.

5. This will bring up the client's **Appointment Details**. Here, you can change the person conducting the appointment and add notes, if needed.

6. If the client brought support people to the appointment, you need to capture their names at check-in. Select 'Add Participant' and type in the person's name in the 'Manage Participants' window. Select 'Save' to add them to the appointment. In COVID-19 response level 2 and higher, they will need to complete the paper form for contact tracing.

7. You can remove or edit information for additional participants by clicking the gear icon next to their name under 'Other Participants'. Click 'Delete' in the 'Manage Participants' window to remove the participant. To edit, change their name and hit 'Save'.

Check in Client  

Appointment Details

Contact  

SWN 

Name 

Work Case Management

Work Type Case Management

Time 02:00 PM

Duration 30 Minutes

Booked With 

Other Participants 

Notes

Note	Date	User	Note
Create Appointment	04/05/2021 09:50 AM		Test
Controller Edit	04/05/2021 09:51 AM		Test

Check-in Settings

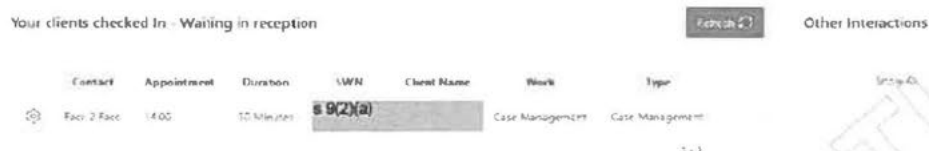




Conducting and Resulting Appointments

Check to see if client is checked in

1. Select **'Next Client'** in the left-hand navigation pane. Face to Face clients who are checked in and in the waiting area will appear on this page on the left-hand side.



2. Pick up the client and proceed with their appointment.
3. To open the client's appointment to see the Appointment Details—including any notes and relevant information (e.g. StudyLink details) — click on the gear icon next to the appointment.
4. If your Client is not a Face 2 Face appointment, they will appear in the right-hand side of the screen under **'Other Interactions'**.

These appointments do not have to be checked in.

After your appointment, result it in Q-Manager

You will only need to result the appointment if the client attends. If they do not check in for their appointment, the system will automatically result the appointment overnight as a 'no show'.

To result the appointment:

1. From the Appointment Details screen, tick **'Completed'** next to 'Status', and hit **'Result Appointment'**.

Appointment

Appointment Details

Appointment Details

Contact: Face 2 Face

SWN: S 9(2)(a)

Name: Case Management

Work: Case Management

Work type: Case Management

Time: 14:00 PM

Duration: 30 Minutes

Booked With: S 9(2)(a)

Other Participants: Add Participants

Result Appointment

Status: ☐ Completed

Note:

Seminars

Creating a Seminar in Q-Manager

1. Select **'Seminar'** in the left-hand navigation pane.
2. Fill in all information under the **'Create Seminar'** heading.
 - Seminar and seminar type
 - The name of the seminar (i.e., **Recompliance; Downer Employment seminar**)
 - Staff Member leading the seminar
 - Duration; date; time and number of clients who can attend (this can be adjusted)
 - Any relevant notes
3. Select **'Create'**
4. The seminar will appear in the calendar on the right-hand side.

Create Seminar

Seminar: Please Select

Type: M

Name:

Staff Member: Please Select

Duration: 30

Date: Please Select

Time: Please Select

Clients: 0 (Number of clients who can attend)

Note:

Create

Editing/Cancelling a Seminar

To make changes to a seminar:

1. Select **'Seminar'** in the left-hand navigation pane.
2. Under **'Seminars in your site'**, find your seminar in the calendar. Click on the seminar.
3. To adjust the number of participants, under, **'Seminar Participants'** change the number in, **'Seminar Clients'**, and press, **'Save Seminar Count'**
4. To reschedule, or cancel a seminar, scroll down to, **'Manage'** and select the option you want. Once selected, press, **'Update'**.

Seminar Participants

Add Participant

Seminar Clients: 40

Save Seminar Count

Booking clients to seminars

1. Select **'Seminar'** in the left-hand navigation pane.
2. Under **'Seminars in your site'**, find your seminar in the calendar. Click on the seminar.
3. The seminar details will appear – showing who is booked into the seminar, and maximum number of participants. Select **'Add Participant'**
4. Enter the Client's SWN, name and status (Booked for Seminar).
5. Select **'Save'**.



Appointment

Seminar Participants

Add Participant

Manage Participant

SWN
Name
Status
Booked for Seminar
No Show
Attended
Cancel

Save

Booking clients to seminars in a different site

1. Click the **'Add Participant'** icon next to the site you want to book on the bottom left-hand corner.
2. Select **'Add Participant'**
3. Enter the Client's SWN, name and status.
4. Select **'Save'**.

Other sites seminars

	Site	Seminar Name	Seminar Counter	Start	End	Type
	Palmerston North	Pohin New Staff	0/1	03/05/2021 08:30 AM	09:00 AM	Employment
	Palmerston North	Employment Engagement	0/5	04/05/2021 08:30 AM	10:00 AM	Employment

Viewing Your Appointments

To view your scheduled appointments in Q-Manager:

1. Select **'Home'** in the left-hand navigation pane.
2. Click on **'Your Calendar'**. This will bring up your past and future appointment schedule in a calendar.
3. You can view your calendar by month, week, or day in the calendar, or click **'undefined'** to view your appointments in a list format.

Your Schedule

week day undefined

4 May 2021

Managing your schedule

When you are first set up in Q-Manager, someone with Admin access in Q-Manager (likely your manager) sets up your regular calendar – your known break times and lunch times. If you have rostered days off, work part-time hours – your Manager will adjust the calendar, so these regularly show in your calendar. If your calendar isn't set up right – speak to your Manager to adjust this.

You can adjust your weekly calendar to show time that you won't be available. This could be due to annual leave; a personal appointment or other activities (Review of Decision Committee; Health & Safety Meeting or site training).

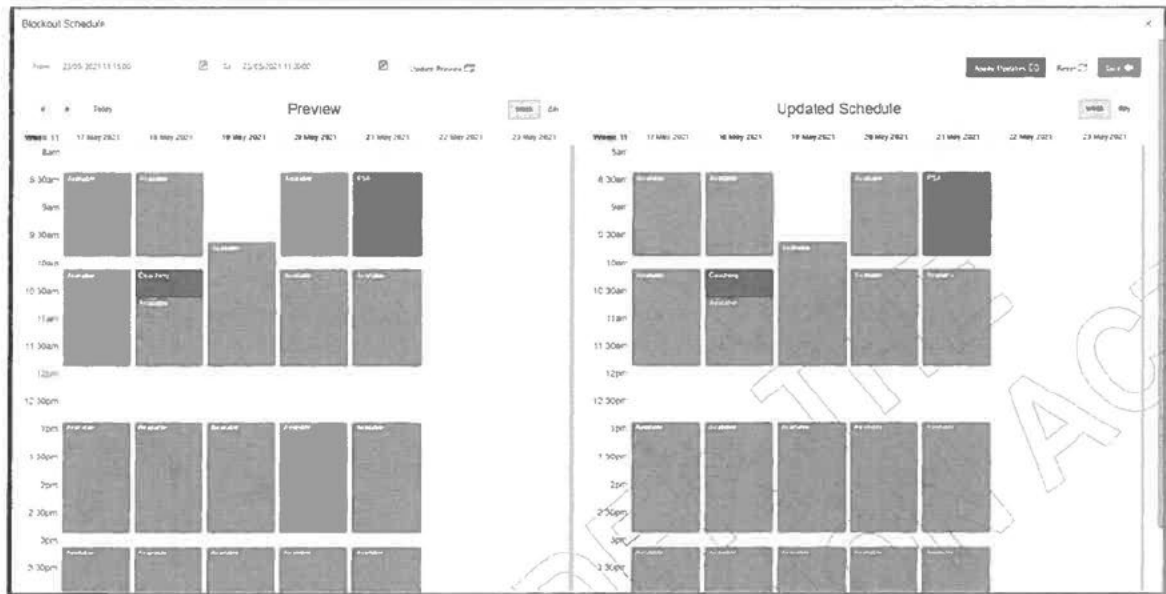
1. From **'Home'** in the left-hand navigation pane.
2. Click on **'Your Calendar'**. Your current calendar will display, along with any appointments.

Your Calendar

View your calendar. Today, past and future.

3. Select, **'Split Schedule'** – this will show you your current schedule on the right side of the screen – and an editable version on the left side of the screen.

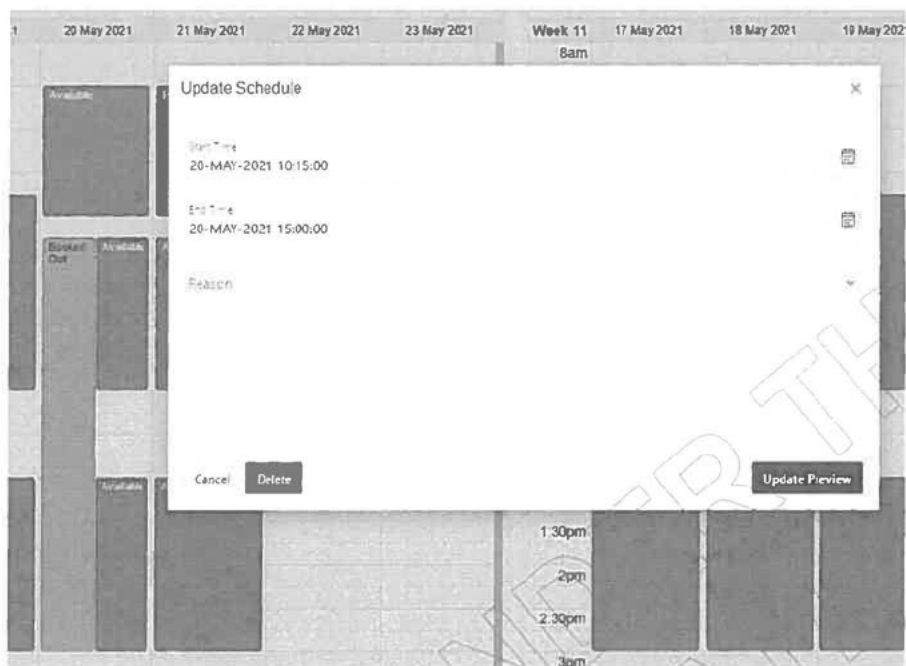
The screenshot displays the 'View Schedule' interface. On the left, there is a 'Split Schedule' button. The main area shows a calendar grid for 'Week 12' starting from 'Today' (24 May 2021) to 28 May 2021. The grid shows time slots from 8:30am to 12:30pm. A tooltip indicates 'Available' for the period '27 May 2021 10:15 AM - 27 May 2021 12:00 PM'.



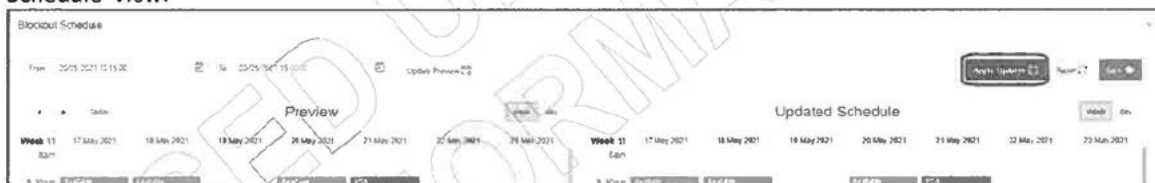
4. You can adjust existing availability by:
- Click and hold on any time slot to drag it to a new location in your calendar
 - Clicking on empty space, or over the top of an existing 'Available' space will allow you to create a 'Book Out' – for example, if you are on Annual Leave, you can create an Annual Leave, 'Book Out'. You can set this as a one-off.
 - Selecting a date range at the top of the page, and an optional time period. Once complete, you also need to select 'Update Preview'



5. Once you have created a 'Book Out' a box will open for you to record the reason for the Book Out – either from the list of options, or freetext comment from 'Other'



6. Once you are satisfied with the changes, select, '**Apply Updates**'. This will then update the 'Updated Schedule' view.



Tips:

- To make an entire time-slot unavailable, you can click on it. A pop-up will appear, select, '**Book out**'. When you go back to the calendar, it will be unavailable to be booked into (display as black)
- If you hover over the bottom of a time slot (green box) you can adjust the length of the time-slot (shorter or longer). You can only manipulate "available" time, not existing appointment bookings, or breaks that are part of the main schedule
- if you regularly work at an alternative site, get your Manager to customise your base schedule – this saves you manually needing to adjust this every week
- If you have existing appointments (blue bookings) in your calendar, these won't be cancelled/overridden with time being booked out
- you can extend any block of time in your calendar (make it longer/shorter), or sliding the block – like you can in Outlook
- you can not move break or your lunch hours, or override them with "Book Out".

Set yourself available in another site:

1. Select the block of time you want to book out
2. Under the drop-down box on the right-hand side, select the new site from the drop-down
3. Select, '**Save Base Slot**'.

Region: Canterbury
* Sub: Canterbury
* Site: Ashburton

Save Base Slot

4. When you go back to, 'Your Calendar' the time-slot will appear in green with the text, 'Available in...'. If the block of time is black, it means it has been set up incorrectly.



To set up a schedule at multiple sites:

1. Follow the steps above to open the window titled, '**View Appointment Slot**'
2. Select the '**Site**' drop down box which give you the list of sites in your region. Select the site you want your schedule to be available.
3. The appointment timeslot name will change from '**Available**' to '**Available in**' the site you have selected

* Region **Wellington**

* Sub **Wellington**

* Site **Newtown** ▼

Tasks

The task area allows you to add and remove specific Straight to Processing (S2P) skills.

Note: Not all skills are accessible (for example, seniors skills must be adjusted by an Operations Analyst).

1. Select **'Tasks'** in the left-hand navigation pane, or on the Home page.

2. Select a Skill type from the drop down on the right-hand side of the screen. Select the **'Type'** first, then the specific **'Skill'** you are wanting to add.



3. Select **'Add Skill'** in the top right-hand corner. This will then be added to your S2P skills. It will show you the number of tasks currently available.



Tip: You can select the green, **'Launch S2P Do Processing'** to go back to S2P – or click the blue **'S2P'** in the top right-hand corner.

Tip: For New Business/Online Applications, there are multiple skills – they currently under the, **'Type'** COVID and OLA.

4. To remove a skill, under **'Your S2P Skills'**, select the **'Remove'** icon, next to each skill.

Skill Profiles

Some S2P skills are added by a profile, rather than individually. This allows skills to be added in bulk – rather than one-by-one. We currently add Annual General Adjustment (AGA) skills this way.

1. Select **'Tasks'** in the left-hand navigation pane, or on the Home page.
2. Under the **'Add Skill Profile'**, select the profile you want to add from the drop-down menu. Select **'Add Skill Profile'**.



3. The profile will appear under, **'Current Profiles'**. Note: the **'Agent Profile ID'** can be ignored. It is not the number of tasks in the skill.
4. The profile can be removed at any time, by selecting the **'Remove'** icon.

StudyLink

This section allows you to check payments they received from StudyLink.

1. Select '**StudyLink**' in the left-hand navigation pane, or from the main page.
2. Enter the client's SWN.
3. Select '**Request Student Allowance and Loan**' in the top right-hand corner.

Request SAL information

Request Student Allowance and Loan

4. Clients information will display below – showing the client's Student Allowance; Student Loan and any declared income. Note: information will only display with their information for the past 6 months.

Files

This is to search for referral forms from corrections for Emergency Housing Special Needs Grant for Department of Correction cohort process. [See Doogie for further information.](#)

1. Select '**Files**' in the left-hand navigation pane, or from the Home screen.

2. Enter the name in the search bar and press enter.
Tip: You may need to enter the surname only, or check with the client if they are known by other names under the Department of Corrections system.

Search

Search

Files

3. Select the icon (on the left-hand side next to '**File Category**') to view the file.

File Category	File Description
Corrections - Referral to Emergency Housing	Referral to Emergency Housing Address Confirmation for J

4. A window will open – it will display who has sent the file to MSD.
5. Select the icon, '**PDF – Click to open file**' – a document will display with required information.

What is Straight to Processing (S2P)?

The guide is to help our people and managers to access, navigate and understand how the Straight to Processing (S2P) tool is being used by the Ministry.

S2P is a web-based task management system that is used to collect and distribute work. Work can be added from multiple sources and S2P can be used as a single view of outstanding S2P work across business areas.

Before COVID, S2P was primarily used by our processing teams, or Seniors staff. Since COVID we have pivoted much of our working age processing work to this tool to assist demand.

Accessing Straight to Processing (S2P)

Open the [web link](#).

Enter standard username and password, and select 'Login'

If you are in Q-Manager, you can jump to S2P via a link in the top right-hand corner.



Add Processing

This tab allows work to be created, which can then be pushed to staff for processing.

To do this, enter the queue/form name, or area you are wanting to add work to under 'Search', or scroll the list on screen.

There are some quick-links directly under the search box to allow quick navigation (for example, "DIU" for Data Integrity Unit).



The information to be entered will depend on where the work is to be added to.

COVID-19 Work Queues

- Emergency; Maintenance; New Business; Hardship; Housing EH SNG; Housing Assessments and Re-applications can be pushed directly to staff through these skills
- Seniors work can be added through a S2P queue, or via existing Seniors workflow (reports including CMS Client Events, Seniors mailbox, or online forms)
Note: Seniors skills should **not** be changed. They are managed through an Operations Analyst.
- Online Applications will also be created and added to S2P once received from MyMSD, and all application steps (agreeing to obligations **and** confirming all documents that can be uploaded, have been uploaded) have been completed by the client.



Do Processing

Staff will primarily work from this page. This allows them to pull and result work.

Status

- Select 'Login' and then 'Available' to be pushed work
- S2P will continue to push work – once a task is complete, a loading icon will display and S2P will push the next task unless stopped.
- You can select 'Pending Not Ready' before resulting a current task, so that they go into 'Not Ready' before the next task is pushed, or
- Staff can select 'Not Ready' before the next task push cycle completes, which presents optional 'Not Ready Types' to indicate why they are not available. Options include, 'Break/Lunch' or, 'Training'

The screenshot shows the 'Status' section of the interface. It includes a 'Current Status' dropdown menu with options 'Not Available', 'Login', 'Available', 'Logout', 'Not Ready', 'Other', 'Break/Lunch', 'Auto Swi Copy', and 'Pending Not Ready'. The 'Available' button is highlighted.

Your Skills

- You will be able to see what you are currently skilled to, and what work is available to be processed
- You can see work you, and others have completed today
- There is data presented regarding processing times. This was added for Centralised Services, and is not used as a reporting tool for frontline staff.

The screenshot shows the 'Your Skills' table with the following data:

Skill	Level	InQueue	Processing Yours	Complete You	Processing Everyone	Completed Total
COVID_APPOINTMENT_Auckland Central_Emergency	100	70	00:00:00	0	00:06:00	0
COVID_APPOINTMENT_Auckland Central_Hardship	100	70	00:00:00	0	00:10:29	2
Report Total:		140		0		2

Your Hold/Skill Hold

- Work that staff have placed on hold will display in this section
- Your Hold is tasks resulted with an outcome of 'Hold' and is otherwise known as Personal Hold. Only the assigned staff member can release this task, and it is not accessible by other staff
- Skill Hold is tasks resulted with an outcome of 'Skill Hold'. Any staff with the same skill can access these tasks and release them from hold.
- S2P will display how long the work will be on hold for, or has been on hold for, depending on the configuration of the hold function for that task.
- Note: Staff may need to uncheck, 'Personal Only' to see all work on hold

When you are pushed work in S2P, the screen will look like this. Information and resulting options will vary depending on what the task is. **Note:** some information has been hidden (SWN; staff details).

Task

Request Information (PID=32246409)

Queue: COVID

Sub-Queue: Appointments

SLAs

Summary

Details

Items Data

Appointment: Emergency

COMARBIT: Service Queue Manager

REASON: Auslands (extra)

Item Data

Outcome

Result

Result:

Conversation Success

11:15 OFFICE: no answer

Needs already met

Re-Queue - Client not available (1 hour delay)

Re-Queue - Client not available (later delay)

Re-Queue - Client in queue

Re-Queue - Re-assigned

Result

Success

Status

Current Status

Assigned

Enquiry

Not Ready

Login

Assign

Auto Scan & Copy

Pending First Read

Your Skills

Skill	Level	In Queue	Processing Time
COVID APPOINTMENT, Auslands Centre (Emergency)	100	50	00:00:00
COVID APPOINTMENT, Auslands Centre (Self-Check)	100	64	00:00:00
COVID APPOINTMENT, Unkempted person's Appointment	100	2	00:00:00
11:15, Enquiry Underload	100	1	00:00:00
SLA, Unkempted	100	1	00:00:00
Report Total		126	

Task Details

Task History

Task	Status	Item	Result
01/05/2021 01:10:13:03 PM	Assigned - Auto	101AC003	-
01/05/2021 01:10:13:03 PM	Re-Queue - Manually		Re-Queue - Client known
01/05/2021 01:14:13:03 PM	Assigned - Auto		-

Multi Assigned

Multi Assigned

Multi Assigned

Your Hold (2) - 09/04/21

Multi Assigned

Multi Assigned

Left side of the screen:

- the client's information (SWN; name and e-mail depending on the skill type)
- task history – who placed the item into the skill; if anyone has picked the work up. In the example above, the task has been re-queued as the client was known.

Middle of the screen:

- what the task is – what skill and region the item is in (In the example above, its an Emergency task for Auckland Central)
- what the need is – if they are added by Contact Centre, there will be notes about what the need is. Tasks generated from MyMSD will simply list the need.
- resulting options – once all actions have been taken, an option will need to be selected from this section. These options will vary depending on what work you are completing.
- multi-assigned tasks or tasks in another queue – tasks that your current client has that are in other skills. These will only display if you are skilled to those queues.

Right side of the screen:

- your status; skills and tasks currently in your holds

Best practice – resulting work

Phone contact

- Use the suffix '25' in front of the call. This ensures the call displays from our 0800 number.
- Give adequate time for clients to answer the phone
- Three attempts to call clients is the minimum. Tasks are to be requeued unless it's the 3rd contact.

Engagement Log

- After each contact attempt, ensure that an Engagement Log is started or added to.
- Note the time called and whether a message was left or not
- In the subject line or in the note add the reason for the call i.e. #1 call to discuss car repairs, this helps if there are multiple requests for different needs

Cannot complete

If the task you have picked up from S2P cannot be completed because of missing information or system constraints:

- Do as much as you can
- Confirm what is needed – check Processing Standards
- Advise the client of what is needed and how they can get this information to us
 - Ensure you are specific with what is required, provide a timeline for the info and consequences of not providing it in that time
- When a call is unsuccessful add a note in S2P as to what number/s you have tried so the next person can see that all numbers have been attempted

Work Completed

Select one of the 'Completed' options – ensure that all work that can be done, is done

- Sweep the SWN – are there in progress Client Event Notes? Other S2P tasks for the same client?
- Ask the client if they need anything else
- Note all discussions in Hardship or a Client Event Note, so the next person knows what you have done

We do not want staff to add tasks to S2P simply to show productivity.

Any work completed in CMS via CEN's you create captures all staff productivity.

Future tasks

Do not add a future task i.e., today is the 10th August and client does not need to be contacted until 14th August, instead advise the client to contact closer to the time, or when they have more information.

Processing standards

- Only ask clients to provide information as per minimum processing standards
- If information is requested, provide the client with options to provide the information. This could be an email address if they are Case Managed, or opening up a document upload window in CMS.

Key Messages

Make every engagement count by:

- First contact resolution
- Sweep the SWN and S2P - one and **done**
- Discuss employment and training opportunities
- Check RecruitMe is up to date
- Make appropriate referrals

View

You can use this section to search by:

- PID (Task ID)
- Client SWN
- Client Name
- User (Staff member ID)
- And other methods (IRD number etc)



As Managers/Regional teams you will find the most use of searching by PID; SWN or User.

Search by Task ID/PID

This search will take you direct to a specific task

- Enter the PID into the search box
- You will be able to see the task details and work history:
 - Main Information – mainly technical data. If a task appears to be 'stuck', it can be helpful to use this column and scroll to, 'Date Delay' – this will show the date/time that a task will be returned to the queue. Tasks may be delayed as the client was not available
 - Item Data – will display the type of task and what the request is
 - Notes – any specific notes from Case Managers who have worked on the task – this may have explanations of why the task has been returned to the queue
 - Work History – this will show you who has 'touched' the task and what the result of this was

Search by SWN

This search will take you to a list of all tasks for the SWN

- Enter the SWN into the search box
- You will be able to see the task history for the SWN
- Results are shown in 'Status Date' order i.e. the last update (not Add Date order).

Search by User

- Enter the user ID into the search box
- Select either, 'Add' (tasks added by the staff member) or 'Status' (tasks completed by the staff member) – or both
- All work touched by the staff member will display. You can see the result (if 'status' was selected) and see the task itself (select the magnifying glass icon).
- **Note:** Results are shown in 'Status Date' order i.e. the last update (not Add Date order)