MINISTRY OF SOCIAL DEVELOPMENT
TE MANATŪ WHAKAHIATO ORA

6 August 2024

Tēnā koe

Official Information Act request

Thank you for your request of 19 June 2024, in which you asked for information about policies and procedures around phone calls, and statistics on food grants.

On 16 July 2024, the Ministry contacted you as the time to respond to your request had been extended under section 15A(1)(b) of the Official Information Act 1982.

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

1. *Procedures and Policy around how to conduct a phone call and compare how Sala should have contacted the phone call.*

Please see the attached appendices that show the policies and procedures around how to conduct a phone call from the Ministry's internal StudyLink intranet pages.

I understand the second part of your question regarding a Ministry staff member is being responded to as part of your service complaint process.

- **Appendix One –** Calling and texting students
- **Appendix Two –** General administrative actions for change events
- **Appendix Three –** Outbound calls

2. *Policy and Procedures around benefit.*

On 16 July 2024, the Ministry contacted you asking you to refine this question as it is very broad, and substantial manual collation would be required to locate and prepare all documents within scope of your request. No reply has been received; therefore I am refusing your request under section 18(f) of the 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.

The Ministry has a publicly available Manual and procedures (Map) webpage, at this link: https://www.workandincome.govt.nz/map/

The Aurora Centre, 56 The Terrace, PO Box 1556, Wellington
– Telephone 04-916 3300 – Facsimile 04-918 0099

3. *Statistics on who gets food grants.*
    a. *Broken down into relationship status to see whether same-sex couples are being disadvantaged.*

Please see **Appendix Four – Number of Special Needs Grants and Declines for food by relationship status during the period 1 January 2020 to 30 June 2024** which sets out the data you have requested.

4. *Disadvantages of being unemployed for couples in a same-sex relationship.*

I am refusing this part of your request under section 18(g) of the Act as the information you had requested is not held by the Ministry and I have no grounds to believe that the information is either held by or closely connected to the functions of another department, Minister of the Crown or organisation.

5. *Stop using Te Ao Māori as token/stickers on the wall and apply the practises. Etc etc*

The Ministry does not have any information to provide in response to this part of your correspondence.

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

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

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

Ngā mihi nui

pp.

Magnus O'Neill
General Manager
Ministerial and Executive Services

Appendix One – Calling and texting students

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This page is about making calls to students and sending text messages through SAL.

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Note: For privacy, no personal information can be sent by text. Text messages are only to let the student know we're trying to contact them.

Calling students

When we update a student's application, we should let them know as soon as possible. The best way to do this is to call the student on the phone.

When making a call through Jabber/ICE, dial out using 279. This displays as 0800 88 99 00 on the student's phone, so they know the call is from StudyLink.

Note: You must call until you get the student's voicemail or for a minimum of 10 rings.

Keep these things in mind when calling the student:

- Be prepared for the call. Make notes if it will help you, particularly if there are several things you need to say.
- Sound confident, polite and assertive. We want to reassure the student with our professionalism, not make them nervous.
- Introduce yourself clearly. Ask the identifying questions first.
- Explain what the call is about. Your conversation can have a relaxed structure, but make sure you explain what they need to know.
- Keep your language simple and jargon free.
- Sound interested. Your attitude will affect the student's attitude. You could be impacting on this person's life; this could be the moment where they decide whether they can continue with their plans to study. Show that you care.

At the end of your call, leave clear and concise notes of your conversation:

- This is what I said.
- This is what the student said.
- This is the action that's going to be taken.
- This is the follow up required.

Leaving messages

When trying to contact the student try all phone numbers, including email and text. If you can't contact them, you can leave a message asking them to call us back.

Note: Remember that student's privacy is important, don't release information without their permission. If someone else wants to know what the call is about or tries to ask about your student, let them know we can only talk with the student.

Leaving messages with other people

Here's an example message you can leave if you speak to someone else:
Hi, this is ___ from StudyLink.

Can I speak to ___ please?

Do you have a pen and paper?

Please ask them to contact StudyLink on 0800 88 99 00. Our office is open from 8am to 5pm Monday to Friday.

Thank you.

If they tell you the student no longer lives there, ask if the student has another phone number you can call them on.

Leaving voicemail messages

Here's an example voicemail you can leave on the student's phone:
Hi ___, this is ___ from StudyLink.

Please contact us on 0800 88 99 00. Our office is open from 8am to 5pm Monday to Friday.

Thank you.

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Sending text messages through SAL

Sometimes students aren't available over the phone or won't answer a call from an unknown phone number.

To make it more likely the student will answer, we can send a text to let the student know we're trying to contact them.

When sending texts through SAL or email, remember:

- Texts are limited to 160 characters including spaces.
- Your text should let the student know they can't text us back.
- Don't put personal or confidential information in a text. Other people may have access to the student's phone.

Note: Always leave a voicemail before sending a text. If the voicemail doesn't identify the student, just say that StudyLink has tried to contact them and that we'll try again later or ask them to call the contact centre.

How to send a text through SAL

To send a text in SAL, there must be a mobile phone number listed in SAL with the type set to Mobile Phone. Otherwise, you will not be able to use this function.

Follow this process to send a message through SAL.

Step	Process
1.	In SAL, open the Navigator by pressing F12.
2.	Click on the **Text** tab.
3.	Click on 'Add Record'.
4.	The **Text** screen will open. You can see previous texts sent to the student. Click on 'Pending' to add and edit your text.
5.	Write your message using one of the SAL text message templates below. **Note:** Only use one of the SAL text message templates below. You must not put personal or confidential information in the text, as other people may have access to the student's phone.
6.	When you are ready to send the message, click the 'Submit' button. The message will show as Pending until it has been sent, then the status will update to Sent.

SAL text message templates

Note: There is also a 160-character limit with the text functionality within SAL. If the message exceeds this limit the text will not be sent to the student.

Initial text
Option 1:

StudyLink here. We will attempt to call you at <<XX:XX>> to talk about your application. Please keep your phone handy.

Option 2:

StudyLink here. We will attempt to call you within the next 30 mins to talk about your application. Please keep your phone handy.

Second text
Option 1:

StudyLink here. We tried to call you earlier, we'll try again at <<XX:XX>>. Please don't call us, we will call you.

Option 2:

StudyLink here. We couldn't reach you when we tried earlier, we'll try calling you again at <<XX:XX>>. Please don’t call us, we will call you.

No contact, need to talk to them
StudyLink here. We've tried calling you today as we need to talk to you about your <<Student Loan/Student Allowance/Jobseeker Support Student Hardship>>. Please call us on 0800 88 99 00.

No contact, update on MyStudyLink
StudyLink here. We attempted to call you. We have processed your <<Student Loan/Student Allowance/Jobseeker Support Student Hardship>>. Please check your letters in your MyStudyLink for an update.

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Appendix Two - General administrative actions for change events

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This page is about the general administrative actions to complete after processing a change event in a student's SAL file. These include clearing the change event, reassessing the application, calling the student, sending a letter, and using S2P to refer a student to Work and Income.

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General administrative actions for change events

After processing a change event and leaving the relevant note template in the student's file there are other general administrative actions to be completed.

Which actions you take will depend on the change event.

General administrative actions include:

- Clearing the change event once all necessary actions are complete.
- "Sweep the SWN" – complete anything and everything you can for the student while in their file.
- Reassess the relevant applications to ensure changes in the student's record take effect and checking that application outcomes are correct.
- Issuing the student an automated or manual letter to the student they are informed of their entitlement and application status.
- Calling the student to give them an update on their applications.
- Updating SAL and/or CMS with the student's most current information.
- Removing NOTEB from SAL or deleting a BRUPI from SWIFTT if they're no longer required.
- Signing off workflows if you have completed the necessary actions.

Note: Changes to payment dates, payment rates and evidence requirements affect entitlement meaning that the student needs to be notified by phone and/or letter.

Actions for all change events

Clear the change event

When you have completed the actions required for a change event, you need to click on the Change Events tab and mark the change event as Done. You should not tick off any change events that you either:

- aren't trained in
- haven't completed.

Assessing / Reassessing applications

Once the application is assessed you need to check your outcome.

- Is SAL requesting further information? Should the application be requesting further information? Is the information available in CMS or SWIFTT?
- Is the application declined? Should the application be declined?
- For sole parents – is the Accommodation Benefit declined? Should it be declined?
- Are you expecting a debt to be created due to a change in rate or entitlement?
- Are you expecting arrears to be created?
- If your assessment has changed the rate of payment or the application status has changed you also need to check SWIFTT:
    - Does the student have a benefit record with a status of:
        - Current
        - Suspended
        - Expired (where the expiry date is after the study start date) or
        - Cancelled (where the expiry date is after the study start date)
    - If they do then you need to complete the benefit check actions or pass the file onto someone who is trained in completing benefit checks.

Once the outcome is correct, and all benefit actions have been completed you need to set the complete flag on your assessment line to Yes.

Updating SAL and CMS

Update SAL and/or CMS when required to ensure the client's information is up-to-date and both systems matches.

Where a student or their partner has an collections postal address in CMS, this is not to be end dated. This address field is utilised by the Client Support – Debt Management to issue ECS letters to their clients.

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Other actions

Depending on the actions taken in the students file, you may also need to complete one or more of the following actions:

- calling the student
- sending the student a letter
- referring the student to Work and Income via S2P.

Calling the student

Sending the student a letter

Referring to Work and Income

Calling the student

It is important that we keep students informed on the progress of their applications to continue providing them with a positive experience

Most students have mail online, so can view and read their letters shortly after they've been generated, however they may not always understand the information in the letter. Our students may also have questions about their applications and will need to call us to follow up.

To provide an all-round service for our clients, if we have received information and have taken actions in a client's record, we should be trying to get in touch with them over the phone to give them an update.

Note: You can assess when a call is not required. For example, you have taken a technical workaround to complete part of a change event process.

Making the call

When making the call, dial out using "279" - this will display on the student's phone as the 0800 88 99 00 so the client knows we are calling from StudyLink.

Note: You must call until you get the client's voicemail or for a minimum of 10 rings, before deeming it unsuccessful contact.

Leaving Messages

Our client's privacy is critical so don't release any information about them without their authority.

When trying to contact the client you must try all active numbers, including email and text.

Examples of leaving a message for a client

- Talking with the householder: Hi, Can I speak to___ please? Do you have a pen and paper? Please ask ___ to contact ___ StudyLink by ___ on 0800 88 99 00. Our office is open from 8am - 5pm Monday to Friday.
- Where the householder tells you that the client no longer lives there, ask whether they have another contact phone number.
- Leaving voicemail: This is a message for ___. Please contact StudyLink by ___ on 0800 88 99 00. Our office is open from 8am - 5pm Monday to Friday.

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Appendix Three – Outbound Calling

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From time to time, Work and Income will run outbound calling campaigns. This page gives general advice for outbound calling, and processes for current campaigns.

Tips for making outbound calls

Here are some tips for handling some situations you may come across while making outbound calls.

The person who answers tells you the client isn't available

Only give as much information as the campaign scripting allows you to. Do not advise the person you are speaking to that you are from Work and Income. If they insist on knowing why you've called, do not engage in conversation. Tell them:

- "This a private business call. We will try to contact Client Name later."
- "Due to the privacy act, I can't disclose that information. Thank you for your time."

Otherwise you can try asking when would be a good time to call the client, or say you will try again later.

The client wants to complete another action during the call, such as book an appointment or declare income

If the client has other needs which aren't related to the campaign, do your best to help with these during the call. Do not tell the client to call us back.

You're not sure how to pronounce the client's name

If you find yourself in this situation, the client is more likely to respond positively if you stay confident.

You can try beginning to address the client, giving a verbal pause, then attempting to pronounce the name.

"Hello, am I speaking to – is it pronounced Mr Client Name?"

The client may take the cue to correct your pronunciation. Try to listen actively, then apologise and correct your pronunciation.

If you are not feeling confident enough to try pronouncing the name, you could try spelling it.

"Hello, I am looking to speak to a person whose name is spelled..."

The client does not want to speak to you

Use the following script:

"Thank you for your time. If you do have any questions you want to ask about this in the future, please feel free to call our (give our appropriate 0800 number based on the campaign)."

The client does not believe you are a Work and Income representative

Explain your role as much as possible, and tell them why you are calling. If they still do not feel comfortable speaking to you, thank them for their time, and suggest they call 0800 559 009. Note the conversation on their record, so the next CSR knows what to do for this client.

The client's record is secured

If the client's record is secured:

1. Ask to speak to the client.
2. Introduce yourself.
3. Advise the client you need to place them on hold while you access their details.
4. Once the record is unsecured, identify the client and proceed with the call as normal.

The client is no longer at this address

If you make a call, and are advised the client no longer lives at that address:

1. Confirm the address of the person you are speaking to.
2. Create a client query for the local office to follow up.

A child appears to be home alone

If you are concerned that you may be speaking to a child under the age of 14 who is home alone, ask extra questions before taking further action. Try asking:

- "Is your mum or dad there?"
- "Who is looking after you? Can I speak to them?"
- "Is there any other older person in the house?" (this might be an older brother or sister)
- "Do you know where your mum, dad, or carer have gone? When will they be home?"
- "Are there any other children in the house with you? Your brother or sister?"

If you are certain the child is home alone, you will need to talk to your service manager and provide them the details from the call, based on the questions you asked the child.

Stay on the phone with the child, while your service manager will contact the police to advise them of the child's situation. They will be given an event reference number. After this, they will then phone Oranga Tamariki on 0508 326 459 to report this. They should also give the event reference number to the Oranga Tamariki customer service representative.

Campaigns

See below for guidelines and scripting on current outbound calling campaigns.

Connect me

What is it?

Connect Me offers an alternative to a consumer being denied an energy service. Those who ordinarily would be declined due to having an adverse consumer credit rating, will instead be offered a wraparound service. Depending on each individual circumstance this may potentially involve MSD, Money Talks, and other social services. If they engage with and agree to this, then they will be onboarded as a customer under the Connect Me trial.

Process

Step	Action	Procedure
1.	Receive email	Open email with attached referral from retailer. The participating retailers are: • Genesis Energy • Meridian Energy • Mercury Energy • Nova Energy • Contact Energy.
2.	Locate client's record	Using the information provided in the referral/consent form, locate client's CMS record. Check if the client has an active programme tag and/or assigned Case Manager. With the exception of Youth clients or tagged RCU/SAU who need to follow BAU processes, we're able to add the redirection for these clients

<table>
<tr><td></td><td></td><td>and liaise with the energy provider to connect the client to power.

If the client is not receiving their full and correct entitlement, that conversation is better had with the Client's Case Manager. See Case Managed Clients for how to refer.</td></tr>
<tr><td>3.</td><td>Contact client</td><td>Contact will be made via the phone number provided in the referral form and/or on CMS record

Note
if a translator or interpreter is required, as indicated on the referral form, you will need to arrange this before you engage. See: Interpreting Services
if an email is marked as "urgent" in the subject line, please prioritise this email. It means the property is currently disconnected from power supply.
Call client on preferred contact number.
If unsuccessful – flag the email as "Unsuccessful contact" (Note: Three attempts at three different times, approximately 2 hours apart, should be made to contact them.) On the 3rd unsuccessful attempt, via return email to the Energy Retailer, advise contact has been unsuccessful using the email template.
Let the client know you're calling from MSD and confirm now is a suitable time to talk
If now is suitable, continue to Step 4
If client prefers a call back, record call back time and flag in email as "Call back requested".</td></tr>
<tr><td>4.</td><td>Client wishes to engage</td><td>Advise the call is being recorded before identifying the client.

For security questions to help identify and verify the client, see Privacy and identifying callers

Discuss the purpose of the engagement:
permission to set up a redirection</td></tr>
</table>

		• to understand the client's current circumstances
5.	Assessing whether client is receiving Full and Correct Entitlement (FACE)	To help improve the client's situation further, there's a few checks that can inform whether the client is receiving all the assistance they are entitled to according to their circumstances. **SWIFTT:** • Benefit type and rate • Supplementary assistance • Existence of a Family Tax Credit • Childcare assistance • Income • Debt and redirections **CMS:** • The number of dependent children (if any) • Partner details (if any) • Must view notes • Recent Hardship assistance • Recent client event notes • Any work in progress (e.g. RODs) • Any upcoming payments The Family Services Directory also contains some useful services to assist the client in other ways. **If client is receiving FACE, continue to step 7**
6.	Completing assessments.	If client is not receiving their full and correct entitlement: • Determine what information is required to understand the clients correct financial needs **If no further information is required:** • Advise client of changes • Change weekly payment rates • Action changes in SWIFTT • Record conversation in CMS • Issue letter to client to confirm new rates **If further information is required:** • Determine what additional information is needed

		- Advise client of what is required - If the client can provide the required information via MyMSD, enable the document upload function and have the client scan in the details to process. - If the client needs time to prepare the information, leave the document upload function open and submit the appropriate appointment to S2P. See: Appointments - Flag in email as **"Further information required"**
7.	Redirection of benefit payments	The suggested redirection amount will be within the referral form and represents the amount the Energy Provider and client have discussed which is likely to cover the predicted energy costs per week. The decision of how much to redirect is completely up to the client. If client suggests or chooses to redirect a lower amount than recommended, have a discussion with them about what this means. i.e potential of arrears accumulating or paying manually. Once the client has decided the redirection amount: - Complete the Editable PDF form Redirection of Benefit Payment on behalf of the client. Make sure to follow the Processing Standards (Doogle) when completing the form, including: - scanning the form to CMS and - sending a copy to the client via post or email (never the PDF version). - In the section requesting agreement from the person or organisation, key in the power company's name and date the referral was received. - Verification of bank account is not required. Banking information for each energy retailer will be filled after searching for the correct supplier in the PYEES screen in SWIFTT Case Managers will follow the BAU process for the setting up of a redirection. See: Adding a Redirection of Benefit Payment (Doogle)
8.	Email power company with result	Use standard email template to inform the energy retailer of the result of the conversation

9.	Create note and letter	Add notes to the Client Event, using the templates. Issue any letters required for the redirection and any changes made to payments. For reporting purposes, it's important the CMS Note is titled “ConnectMe” with no space
10.	Result email	Email can be marked as complete.

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All notes to be recorded under: Service Delivery/Change in Circumstances/Redirection of Benefit Payment

Expand for editable note templates

Expand for editable Email templates

Vulnerable consumers

Electricity retailers can refer vulnerable consumers to us. They can do this by emailing a vulnerable consumer referral form to workandincome_electricity@msd.govt.nz.

Customer Service Representatives following up these referrals first need to ensure the form is completed in full, noting that we:

- have confirmation the consumer has consented
- have enough information to contact the consumer
- can see what kind of help they may need

CSRs keep track of referrals using copies of a referral spreadsheet.

Process

1. Locate the client's CMS/SWIFTT records
2. Save the Referral form
3. Add customer's details to the spreadsheet
4. Contact the client

    Use these scripting suggestions

5. Use this table to determine your next steps:

Client interested	1. Email client query to say an appointment has been booked, and CC the retailer 2. Move the email to the Sent folder in the Power Inbox and assign it to yourself 3. Complete CMS note Service Delivery > Hardship Assistance > Power > Retailer Referral
Client not interested	1. Email the retailer with the outcome 2. Move the email to the Sent folder in the Power Inbox and assign it to yourself 3. Complete CMS note Service Delivery > Hardship Assistance > Power > Retailer Referral
Client not available	1. Schedule a callback for the following day 2. Complete CMS note Service Delivery > Hardship Assistance > Power > Retailer Referral (If a client event already exists for this referral, add a comment). 3. Note the Spreadsheet. If you still cannot reach the client after a subsequent callback, you can add a comment to the previous client event. If you are not able to get a hold of the client after 2 callbacks, you will need to send the Electricity Referral letter. Note this in the client event. If the address we have on file is different from the one provided by the power company, use the address they provided.

6. Assign the referral to yourself in Outlook, so other CSRs can easily see who has worked on it.
7. If no callback is needed, move the referral email to the appropriate folder in Outlook, e.g. Appointment Booked.

FAQs

Verification of vulnerability

Do retailers have to provide verification prior to referral that a Vulnerable Consumer is vulnerable?

Discussing payment options before a referral

Are Vulnerable Consumers required to have tried all payment options with their retailer before being referred to Work and Income?

Is it only at disconnection a referral can be made to Work and Income?

Consent

Can consent only be sought at the time the retailer refers the Vulnerable Consumer to Work and Income?

Can a retailer still refer a 'Vulnerable Consumer' where consent has not been obtained?

Can retailers request personal information, such as an address for the consumer?

Can we accept a referral form from a support person or agent?

Service standards

When will retailers know if assistance will be provided to the Vulnerable Consumer?

What email address will Work and Income reply to when advising the retailer of the outcome of the Vulnerable Consumer referral?

What information will be sent to the retailer advising an appointment has been made for the Vulnerable Consumer?

What happens if the referral form from the retailer is a client of the Remote Client Unit (RCU)?

EOSY for CDA

This campaign is run near the end of the school year so we can talk to clients who get CDA for an 18 year old dependent child, to check the child's eligibility for Supported Living Payment.

A	Hello, can I speak to <Client Name> If you're unable to speak with the client, exit the scripting and go to section **E**.
B	This is **Your Name**. I'm calling from Work and Income to talk to you about your financial assistance as I understand you have a dependent child who turns 18 this year. Is now a good time to talk with you? **Client - No:** Would you like us to call another time? (schedule call back **or** client not happy to talk) **Client - Yes:** Great before I go on, for privacy reasons I need to confirm that I'm speaking with the right person. See Privacy & Identifying Callers If you're unable to sufficiently identify the client, politely thank them for their time and end the call.
C	Determine whether child is still dependent and has completed the school year. Firstly, is your child still dependent on you? No: Child not dependent

Yes: Child is still dependent

D

Check CDA child eligibility:

Still dependent - On 02/01/xx the Child Disability Allowance you currently receive for <child's name> will stop as you no longer qualify for this once your child is not considered a dependent child.
Not dependent - Because your child is no longer supported by you the Child Disability Allowance you currently receive for <child's name> will be reviewed.

Important: A caregiver is only an agent for the child up until they have turned 18 years old. If the caregiver still wants to be an agent for the child once they've turned 18 years old they'll need to complete an Appointment of Agent form.

What we'll do today is check whether <child's name> qualifies for assistance and if so, arrange an appointment for <child's name> to apply for that assistance.

Have you already advised or discussed this with a case manager?

No: haven't discussed this with a case manager

Yes: already discussed with cm

E

When to use each outcome code

Call outcome code	Explanation
Will apply SLP	Discussed eligibility and child will apply for SLP
Will apply 'other'	Discussed eligibility and child will apply for assistance that's not SLP
Client advised	Client has already made contact with a case manager and arrangements have been made. A guide to help from Work and Income brochure sent.
Client unavailable	Client able to act independently but unavailable to talk, asked for child to call us on 0800 559 009. A guide to help from Work and Income brochure sent.

Agent required	Child requires an agent due to condition, agent from and application sent. A guide to help from Work and Income brochure sent.
Decline assistance	No further assistance required. Updated.
Language difficulties	Unable to communicate clearly with client
Call back	Client unavailable
Available after hours	Client not available till after 5pm
Not happy to talk	Client refuses to participate in the conversation or provide personal information
Wrong number	Unable to contact client on number dialled
Do not call	Person at the dialled number tells CSR not to ring this number
Fax	Call connected to a fax machine
Answering machine	Call connected to an answer machine.

FAQs

What happens if a client has just renewed their child's medical certificate for CDAand it expires well after 2 January 2020?

What about Low Trust clients?

What if the child needs ongoing financial support?

What benefit will the child qualify for?

Can the client still act on behalf of the child?

Links

Child Disability Allowance (Map)
End of School Year

Full and Correct Entitlement (FACE) pilot

Pilot Background

Currently MSD has no formal measure to help us understand how many of our clients are receiving their full and correct entitlement (FACE). Over a twelve-month period, up to 3,500 clients will be contacted and invited to take part in a proactive conversation - to check they're receiving their full and correct entitlement. The pilot team in Hastings will engage with clients in their preferred language, using their preferred contact method.

Over the course of the pilot we plan to:

- Understand the percentage of clients receiving Full and Correct Entitlement
- Confirm the best way to engage with clients initially and when completing assessments
- Understand any key trends showing why a client may not be receiving Full and Correct Entitlement
- Provide insights to inform the future service model and Te Pae Tawhiti.

How are we doing this?

We are surveying a randomly selected client cohort. Approximately 500 clients aged 18 – 64 years who are receiving a main benefit and/or supplementary assistance will be invited each fortnight to take part in the pilot.

- A dedicated team of case managers in our Hawke's Bay Centralised Services Unit will work with the majority of clients who take part in the pilot
- Clients who are in active case management will be referred to their case manager to complete the full and correct entitlement assessment. If you're the randomised client's case manager, the pilot team will email you.

Note: You can check the engagement log to see if the client has been invited;

- If a client hasn't been invited but asks for you to check their full and correct entitlement, please follow business as usual processes
- If clients have been invited please refer them to the Full and Correct Entitlement team via the following channels.

Phone: 0800 752 103

Email: face_proactive_engagement@msd.govt.nz

Note: Please don't refer clients to the Full and Correct Entitlement Team if they haven't been sent a pilot invitation.

When referring invited clients, please provide the Full and Correct Entitlement team with:

- Client name
- SWN
- Contact number
- Email address
- Preferred contact method
- Any key notes

Referrals for Clients in active case management

An overview to case managers who are supporting their clients to assess their full and correct entitlement.

The Pilot team refers clients with the following active case management programme tags to their case manager to complete the full and correct entitlement assessment. See: Case Managed clients

The Pilot team will provide templates for you to complete with your client and return.

Key Topics to cover during the conversation

- Confirm the financial assistance the client is currently receiving
- Check if client is having trouble making ends meet
- Check clients current benefit breakdown including:
    - Main benefit
    - Accommodation supplement (if applicable)
    - Emergency housing (if applicable)
    - Temporary Additional Support/Special Benefit
    - Child related benefits (including Child Disability Allowance and Disability Allowance for family members)
    - Disability Allowance
    - Any debt deductions (can these be adjusted?)
    - If there are any income or cash assets recorded on file

- If clients are receiving manual rates of payment (benefit and supplementary assistance) are these correct?

Confirm if the client has had a change of circumstances in the last two weeks, including:

- Have their accommodation costs changed?
- Have their immediate costs changed?
- Have their Temporary Additional Support/Special Benefit needs changed?
- Has the client been earning income? Has this changed?
- Does the client have children in their care? Has this changed?
- Is the client in Social Housing?
- Is the client in Emergency or Transitional Housing?

- Check clients Hardship count and if high, discuss cause
- Re assess client's financial assistance qualifications in DREW and discuss any potential changes
- Check if there's other government assistance the client could qualify for, eg Working for Families

Additional Topics to cover:

- Are the address and contact details in the system up to date?
- Do clients have MyMSD or do they know how to use it?
- Up-coming expiries:
  - TAS
  - Reapplication
  - CYC, etc
- If hand-shaking to site for employment – are they ready?
  - Job Seeker Profile up-to-date
  - CV on file
- Debts and offsets – not just debt
  - Offsets on file – can they be adjusted?
  - Payees – what's on there, does the client know they can contact agencies to ask for review?
    - MOJ
    - IR – Child Support
  - Non-negotiable debt (court ordered) – refer to budgeting for discussion.

CMS Engagement Template

Referrals for clients to service centres

For case managers who are supporting clients with a face to face assessment. Note: if a client decides to engage over the phone instead, please refer them back to the Full and Correct Entitlement assessment team.

This is the same process as 'Referrals for clients in active case management' above (excl sending an engagement letter).

Job Seeker Profile Outbound campaign

This process is for select Central Processing Officers only

During the peak of COVID-19 the demand for income support services resulted in some employment related activities being slowed down. During this period many clients did not have a Job Seeker Profile (JSP) completed or updated meaning they could potentially be missing out on suitable jobs.

To set the client up well and put them in the best position to find suitable employment, clients with an incomplete JSP or one that has not been updated for more than 2 years will be contacted to complete the following actions:

- Complete update of the Job Seeker Profile
- Assistance with creating or updating CV
- Register client for MyMSD
- Job matching

First, we will text clients that have logged onto MyMSD within the last 3 months to encourage them to go online to MyMSD and update their JSP.

Clients that have not recently logged into MyMSD and those that did not update their profile in response to the text will be added to the outbound dialler for phone contact.

Step 1: Open the call	**Good Morning/Afternoon, may I please speak with <client's name>?**
Step 2: Introduction	**This is <your name>, I'm calling from the Ministry of Social Development.** **Is now a good time to talk with you?** **Before we can go on, for privacy reasons I need to check I'm speaking with the right person. Can you please tell me <use appropriate identifiers >** You must identify and verify the client. See Privacy and identifying callers

	If the client is not available or you get an answer phone, go to step 3. **I need to let you know that this call is being recorded. We may use this for staff training and providing support and services. Are you happy to proceed?** **The reason for my call is, we noticed that we may not have your up-to-date work information. I would like to go through this with you today, updating this information will support matching you to jobs that work for you.** **If the client doesn't speak English:** Use language line or Connecting Now if you can. See: Interpreting Services If you can't continue with the call, go to step 3. Otherwise, skip to step 4.
Step 3: Unsuccessful contact	Create a Client Event or add to the existing one if available and send the client an email or letter. See templates at the bottom of this process. Result the screen pop: • Call back - if now's not a good time and client wants a call later • Invalid number – if the phone number doesn't work • Wrong number – if the number belongs to someone else • No answer • Did not want to discuss • Language Difficulties
Step 4: Job Seeker Profile	Have a conversation with the client about where they are at with their job seeking journey. Extract as much information as you can about: • What opportunities they have gone for or want to go for • Previous work history • Any difficulties they have faced getting into employment, e.g. turned down for positions because of lack of training, and are they willing to partake in training? Or perhaps they didn't have the funds available for petrol to get to an interview. • Any qualifications, Drivers Licence details or multi-language skills Use this information to create/update JSP. The following fields MUST be completed to ensure the profile is complete. • Personal Details

	• Preferred work locations • Work experience • Career Path • Drivers Licences • Formal Qualifications • Languages
Step 5: Does the client have a CV on file?	**Yes**, locate CV in CMS or shared drive, confirm information, update if required and save in CMS: **Go to step 6** **Or** ask client to upload to MyMSD, update if required and save in CMS: **Go to step 6** If no CV exists, and the client is not confident creating one, create CV for the client. Save in CMS. Email copy to the client for their reference. CV Templates — People Passion CV Builder - CV Templates - Auckland Chamber
Step 6: Does the client have a MyMSD account?	**Yes:** advise client their top 3 jobs (that match their profile) will be displayed and updated daily at 11am. They can also click through to reach a full list of jobs, in order of relevance to their profile - MyMSD Job Board - Doogle (ssi.govt.nz). Advise client to apply for these jobs, they can ring Job Search Line 0800 779 009. **Go to step 7** **No:** support client to set up a MyMSD account - How to use MyMSD - Doogle (ssi.govt.nz)
Step 7: Job Search	Search for jobs via MSD Find a Job, using the client's location and what their work history and/or preferred industries are: Find a Job website Discuss appropriate job vacancies. Suitable clients will meet any pre-requisites, have all required licences, be able to work the required hours, and most importantly be interested in the opportunity. Complete 'Registration of Interest' (where relevant). Pre-requisites: • Qualifications • Experience • Able to pass a drug/medical test (if required) • Has necessary licences (if required) Email vacancy manager with: • Job ID (in subject line) • CV

	• A brief outline of how the client meets the job requirements and their willingness to apply
Step 8: Further follow up	If client requests appointment with local service centre to discuss further employment (Work Broker) or training (Programme Co-ordinator) options, send request via STP (Queue: Regional Services Sub-queue: Service Centre Referral) selecting/noting: • Region • Site • Reason F2F is required (i.e. F2F with Programme Coordinator to discuss training courses available) If the client had advised they require help with financial assistance, such as a hardship grant, you can complete this over the phone. For anything else that may be specialised or needing assistance from a Case Manager, please direct this through BAU channels. See Appointments - HIYA homepage - MSD Confluence (ssi.govt.nz)
Step 9: CMS and email	Create a client event note regarding interaction. Include what actions you have completed, e.g. JSP updated, CV completed/updated, registered for/showed functionality of MyMSD, Job search, Registration of Interest. Send the client an email using the successful contact template.
Step 10: Resulting the call	Result the pop box with what outcomes were achieved with the client: • JSP complete only • JSP and CV • JSP and MyMSD • JSP and Job Search • JSP, CV and MyMSD • JSP, CV and Job Search • JSP, MyMSD and Job Search • All actions completed • Referred to region. Once the pop box is completed, the next call will automatically come through. The box needs to be completed within 15 minutes of the conversation ending or an error will occur. If this happens, email contact_centre_request@workandincome.govt.nz with the appropriate outcome type.

Note templates

All notes should be added as:

Sub type: 'work related engagement'
Note description: 'JSP Outbound Calling Campaign'

If a client event already exists for the same reason, please add to this event instead of creating a new one.

Client did not answer, was unavailable or we hold an incorrect phone number.

Attempted to contact client to discuss their Job Seeker profile and help them update or create a CV to assist in their job searching. If client calls back, please ask them if they are happy to take part and assist as best you can.

Successful conversation

Contacted client and assisted them with <add what you did for client and any next steps>

Email template

Successful conversation

Kia ora,

Thank you for speaking with me today. As discussed, here is the link to our Find a Job website.

If there are any jobs of interest, please call our Job Search Line team on 0800 779 009 and quote the Job ID.

Ngā mihi,

Appendix Four - Number of Special Needs Grants and Declines for food by relationship status during the period 1 January 2020 to 30 June 2024

Relationship	Applications Processed		Total
	Declines	Grants	
Female / Female	402	5,772	**6,177**
Female / Gender Diverse	24	354	**381**
Gender Diverse / Gender Diverse	3	66	**69**
Male / Female	41,739	633,891	**675,633**
Male / Gender Diverse	9	333	**342**
Male / Male	96	1,422	**1,518**
No Partner	235,509	5,444,148	**5,679,654**
Total	**277,782**	**6,085,989**	**6,363,771**

Notes:

- *This is a count of grants and declines, not clients. A client can have more than one grant or decline during the period.*
- *From 2 December 2019, The Ministry of Social Development has three options to record a client's or child's gender: Male, Female or Gender Diverse.*
- *To protect confidentiality the Ministry of Social Development uses processes to make it difficult to identify an individual person or entity from published data.*
- *These data tables have had random rounding to base three applied to all cell counts in the table.*
- *Random Rounding does not round to zero. A value of one or two will be rounded to three.*
- *The impact of applying random rounding is that columns and rows may not add exactly to the given column or row totals.*
- *The published counts will never differ by more than two counts.*