



**MINISTRY OF SOCIAL
DEVELOPMENT**

TE MANATŪ WHAKAHIATO ORA

Jem Traylen
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24 JUN 2020

Tēnā koe Jem Traylen

On 31 October 2019, you emailed the Ministry of Social Development (the Ministry) with the following request, under the Official Information Act 1982:

- *Your Minister has asked that your staff ensure that people receive their full benefit entitlements. Please provide a copy of any significant internal papers or Ministerial advice on the implementation of this request.*

On 21 February 2020, the Ministry provided you with a copy of 'Strengthening our Service Culture (October Update)' which is one of seven documents in scope of your request.

I apologise for the delay in responding to the remainder of your request. Please find attached the following six documents:

No.	Date	Title
1	30 January 2019	<i>Memo: Driving Greater Uptake of Assistance – January update Appendix A Online Eligibility Guide</i>
2	25 March 2019	<i>Memo: Driving Greater Uptake of Assistance- March update Appendix A Online Eligibility Guide</i>
3	29 May 2019	<i>Memo: Driving Greater Uptake of Assistance- May update Appendix A Online Eligibility Guide</i>
4	28 August 2019	<i>Memo: Driving Greater Uptake of Assistance- August update Appendix A Online Eligibility Guide</i>
5	17 May 2019	<i>Memo: Outline of information on take-up and Accommodation Supplement and Temporary Additional Support</i>
6	23 May 2019	<i>Report: Addressing and measuring take-up and the delivery of full and correct entitlements</i>

To provide further clarity, the following information summarises the content of each of these documents.

The primary purpose of the quarterly memos (**Documents One-Four**) titled: *'Driving Great Uptake of Assistance'* is to provide the Ministry's Organisational Performance Governance Committee (OPGC) with an overview of the initiatives that are planned or being implemented that focus on driving greater uptake of the assistance provided by the Ministry. The establishment of OPGC was to ensure that all decision-making processes within the Ministry are provided with the necessary consideration, assurance and appropriate processes to deliver the Ministry's strategic priorities and objectives, including increasing the uptake of assistance and entitlement benefits.

Document Five, *'Memo: Outline of information on take-up and Accommodation Supplement and Temporary Additional Support'* was produced in order to seek feedback on the current action plan for take-up and FACE plans for the resulting paper. It also recognises the gaps within the projects that require further work.

After receiving feedback from the Minister for Social Development, Hon Carmel Sepuloni, on 23 May 2019, the Ministry produced **Document Six**, *'Report: Addressing and measuring take-up and the delivery of full and correct entitlements.'*

The names and contact details 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.

You will note that some information is withheld under section 9(2)(f)(iv) of the Official Information Act as it is under active consideration. The release of this information is likely to prejudice the ability of government to consider advice and the wider public interest of effective government would not be served.

You will also note that some information is withheld under section 9(2)(g)(i) of the Act to protect the effective conduct of public affairs through the free and frank expression of opinions. I believe the greater public interest is in the ability of individuals to express opinions in the course of their duty.

For your interest, additional background information is provided below.

In May 2018, an 11-member Welfare Expert Advisory Group (WEAG) was established by the Ministry to provide advice to the Government on options that could best give effect to its vision for the future direction of the social welfare system and drive its current welfare overhaul scheme. Since its foundation, amongst other things, the WEAG has supported two important projects; take-up, and full and correct entitlement (FACE). Take-up refers to the proportion of an eligible population that accesses and receives the financial assistance they are eligible for.

Take-up of income support alleviates poverty and hardship and supports employment and broader wellbeing, so even though take-up numbers may be low, they are important and wider accessibility is part of the Ministry's overall welfare overhaul programme. You may note that take-up numbers in New Zealand are relatively low, however, international research shows that take-up rates of income support are often significantly less than 100 percent, including in the United States, the United

Kingdom, and Canada. More information is detailed in the WEAG's report '*The take up of income support: Analysis and Options*' which can be accessed at the following link: www.weag.govt.nz/assets/documents/WEAG-report/background-documents/38f35441ff/Take-up-of-Income-Support-010419.pdf

FACE is a subset of take-up. While take-up looks at whether all eligible people across the New Zealand population are receiving payments, FACE considers this from a client perspective and ensures that Ministry clients are receiving the full set of payments that they are entitled to, at the correct rate.

As part of the Wellbeing Budget 2019, on 1 April 2020, the Ministry repealed Section 192 (formerly Section 70A) of the Social Security Act 2018. Section 192 required the Ministry to reduce the payment of a main benefit in respect of a dependent child where a beneficiary fails to fulfil obligations relating to child support; such as naming the other parent when applying for child support. Section 193 provides a number of exemptions to these reductions where there is a good reason not to identify the other parent, such as where this would result in a risk of violence.

From 1 April 2020, the sanction which reduced a client's benefit if they do not name the other parent of their child when they apply for child support will be removed. This will reduce the additional financial pressure on these parents as a result of the reduction. More information on this topic is available here: www.msd.govt.nz/documents/about-msd-and-our-work/newsroom/factsheets/budget/factsheet-removing-deductions-sole-parents-2019.pdf

The Ministry is also working to bolster both awareness and accessibility for the Accommodation Supplement and Temporary Additional Support. The Accommodation Supplement is an income and asset-tested payment to support people with housing costs, and Temporary Additional Support is a weekly payment that helps to meet people's essential living costs. The previously provided '*Strengthening our Service Culture (October Update)*' outlines the specific goals identified by providing more safe and friendly spaces for clients to come and discuss more available benefits.

You might also be interested in the Cabinet Paper, '*Welfare Overhaul Update on Progress and Long-Term Plan*' which further explains the Ministry's work to ensure access to FACE as part of the ongoing welfare overhaul. This is publicly available here: www.msd.govt.nz/documents/about-msd-and-our-work/publications-resources/information-releases/welfare-overhaul-update/cabinet-paper-welfare-overhaul-update-on-progress-and-long-term-plan.pdf

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 and any attached documents

available to the wider public. The Ministry will do this by publishing this letter and attachments 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 regarding the Ministry's actions to ensure people receive their full benefit entitlements, 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.

Heoi and



Viv Rickard

Deputy Chief Executive Service Delivery



Memo

To: The Organisational Performance Governance Committee

CC: Jo Cunningham, General Manager Strategy and Change, Service Delivery

From: 9(2)(a) General Manager Advisor, Service Delivery

Date: 30 January 2019

Security level: IN CONFIDENCE

Driving Greater Uptake of Assistance

Purpose

- 1 This memo provides the Organisational Performance Governance Committee (OPGC) with an overview of the initiatives that are planned or being implemented which focus on driving greater uptake of the assistance provided by the Ministry.

Recommendations

- 2 It is recommended that the Committee:
 - a. **Note** that there are a number of initiatives across the Ministry that are working to drive a greater uptake of financial assistance.
 - b. **Note** that the next update will be provided to assist the Committee to monitor the success and outcomes of these initiatives on 3 April 2019.

Background

- 3 Across the Ministry, there are a number of initiatives or programmes either underway, or in the planning phase that are working to drive a greater uptake of assistance.
- 4 These initiatives include:
 - The Online Eligibility Guide
 - Proactive Calls to Action (text messaging)
 - Proactive Client Entitlement (Analytics to the Frontline)
 - Enhancing Disability Allowance settings
 - A Temporary Additional Support campaign
 - Changes to hardship assistance processes to improve access for clients
 - A Full and Correct Entitlement taskforce
 - A measure of clients receiving full and correct entitlement
 - Leveraging off providers and other stakeholders

Online Eligibility Guide

Service Delivery

Strategy and Change

■ Complete

- 5 The 'Check what you might get' guide was launched on 26 June 2018 and provides a quick, simple to use online platform for clients to work out potential eligibility and entitlement.
- 6 As at 21 January 2019:
 - over 229,000 people have visited the guide and spend an average of 4:58 using it
 - more than 80% of people complete all questions and are provided with information about the assistance that may be available to them.
- 7 **Appendix A** provides more detail about usage of the guide.
- 8 Since the guide was launched, supplementary forms of assistance have been presented to people most often as the type of assistance that they may be available to them, and have received the highest click through rates for further information about how to apply.
- 9 Recent enhancements to the guide include adding Te Reo headings, providing an email feature for people to get their results for future reference, and improving the way we ask questions and present information.
- 10 Promotion of the guide will continue this year. Planned activities include messaging to former clients, adding links to the guide to campaign emails, and promotion through stakeholder activities. The use of Google SearchWords will also continue, and will be adjusted regularly to align with different events and activities.

Proactive Calls to Action

Service Delivery

Strategy and Change

■ In Progress

- 11 Through the Proactive Calls to Action pilots we will send personalised and proactive messages to clients via text, email and MyMSD banners.
- 12 The first pilot started on 10 December, where proactive text messages are being sent to a selection of 500 clients each week reminding them to renew their medical certificate.
- 13 The criteria that have been defined to measure the success of this particular pilot are:
 - an increase of 10% in medical certificates being submitted and renewed prior to their expiry by clients participating in the pilot, over those in our non-pilot group
 - less than 20% of clients participating the pilot choose to opt-out of receiving any future proactive text messages
 - 80% of clients surveyed are positive about the proactive messages they receive and advise that they were useful to them.
- 14 The wording of the message that clients receive is:
"Work and Income NOREPLY: Heads up. Your medical cert expires in 3 wks. You need to renew it to keep getting payments. Call us Mon-Sat for help or to stop texts."
- 15 To date, approximately 3,400 clients have received a reminder. Preliminary analysis shows:
 - 35% of clients who received a text message renewed their medical certificate prior to their expiry (compared to 25% generally)
 - less than 1% of clients who have received a text message have chosen to opt-out
 - 96% of clients surveyed about their experience found the reminder useful.
- 16 The pilot concludes on 31 January 2019. At this time, further analysis will be completed to determine how the pilot performed against the success factors that have been defined, with a view to expanding this service to all clients. Detailed outcomes of this initiative and an implementation plan for wider delivery will be provided in the next update.
- 17 Additional pilots are planned for the first quarter of 2019, and include:
 - work obligation failure notifications
 - appointment reminders.
- 18 These pilots will continue to test the approach, timeliness of the messaging and how receptive clients are to these initiatives.

9(2)(f)(iv)

[REDACTED]

■

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

Enhancing Disability Allowance settings

Service Delivery

Client Experience and Service Design

■

Planning &
Discovery

22 A two-stage work programme for delivering options to enhance settings for the Disability Allowance is currently underway. The two streams are:

- Work stream one – reducing verification requirements and updating Disability Allowance forms (mid-2019).
- Work stream two – options analysis for the potential delivery of electronic lodgement, 9(2)(f)(iv)

23 This work programme is currently in the discovery phase with implementation of work stream one likely to occur from July 2019.

Temporary Additional Support campaign

Service Delivery

Strategy and Change

■

Complete

24 A pilot to proactively contact clients who might be eligible for but not receiving Temporary Additional Support ran from 5 November 2018 to 21 December 2018.

25 As well as identifying potentially eligible clients, the intention of the pilot was to also understand which communication channel most effectively engaged clients about the assistance available to them.

26 A campaign group of approximately 3,000 clients who were potentially eligible for payments of more than \$72.50 per week were identified, and were contacted either by email, letter or phone.

27 Interim findings from the pilot include:

- there was a 10 percentage point increase in grants of Temporary Additional Support among those contacted as part of the campaign (grants of Temporary Additional Support increased from 6% to 16%)
- contact by a phone call had the largest impact, followed by the letter and the email
- clients granted Temporary Additional Support after being contacted received payments averaging \$80 per week.

28 Based on the initial findings, consideration is now being given to implementing this approach as a business as usual activity. Options in relation to an implementation approach will be developed in February, with final recommendations and a decision as to whether to proceed in March.

29 Other examples of where this type of model could be used include identifying clients who exit the benefit system to work, and are eligible for but are not transferred on to on-going supplementary assistance i.e. Accommodation Supplement.

Improving access to hardship assistance

Service Delivery

Business Process Management

In Progress

30 Work is underway on a set of initiatives to improve access to hardship assistance. Currently, different rules for managing hardship assistance are used across multiple channels which make it difficult for clients to access the support they need.

31 Initiatives that are underway include:

- implementation of the Full Assist approach within the contact centres, where customer services representatives are able to administer a wider range of hardship assistance over the phone
- enabling clients to apply for school costs via the contact centre.

32 In addition, a review of hardship assistance processes has been completed and the following changes will be implemented from the end of March 2019:

- removing the rules from MyMSD and changing contact centre processes to allow clients to apply through any channel they choose, as long as they have special need grant and/or advance entitlement
- 9(2)(f)(iv)
[REDACTED]
- removing the intensive interview that clients are required to participate in if they receive six or more hardship grants
- removing the requirements for managers to approve hardship assistance when a client's hardship count is six or more.

33 These changes are likely to see an increase the number of hardship assistance applications being able to be completed online or over the phone, removing the need for clients to book appointments or wait in a service centre to be seen.

Full and Correct Entitlement taskforce

Service Delivery

■ Planning & Discovery

34 Following a report sent to Minister Sepuloni on 26 October 2018 regarding the approach for proactively engaging with Sole Parent Support clients who have a reduction to their benefit under section 70A of the Social Security Act 1964 (now replaced with section 192, Social Security Act 2018), it was identified this group may not be receiving full and correct entitlement.

35 As a result on 7 November 2018, a request was made to broaden our focus to establish full and correct entitlement with clients within this cohort. This means that an engagement approach will be taken to ensure reductions have been explained and applied correctly, along with reviewing entitlement to all other assistance.

36 On 26 November 2018 a design workshop was convened to determine the options in relation to the approach and communications, for both clients and staff. A working group has been established consisting of subject matter experts from across Service Delivery.

37 The working group has identified a number of underlying principles:

- the practice must be designed to allow a number of different cohort groups to be managed
- guidelines for staff must be developed to help case managers discuss the client's circumstances which may be difficult for the client to talk about, for example family violence
- ensure any current practices are included in the guidelines developed for this approach to avoid replication and inconsistency
- engage with other business areas' subject matter experts to provide advice on their current practices and how best to utilise and incorporate these processes in the final design of the Proactive Engagement Practice framework
- the practice framework must allow the regions flexibility to decide how the work is managed e.g. at a central regional point, specialised case managers in a service centre or by all case managers in an office (WFCM or GCM case managers)

38 The working group is currently working through data and analysis to determine how clients within this cohort will be prioritised and engaged with. It is intended that implementation activity will occur from late April 2019.

9(2)(f)(iv)

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

Leveraging off providers and other stakeholders

Service Delivery

Partnerships and Programmes



Complete

- 41 On 2 December, the latest version of the Kotahitanga newsletter was published to a wide range of providers and stakeholders. This included a section on 'Helping people to understand what they can get' which promoted the use of the 'Check what you might get' guide.

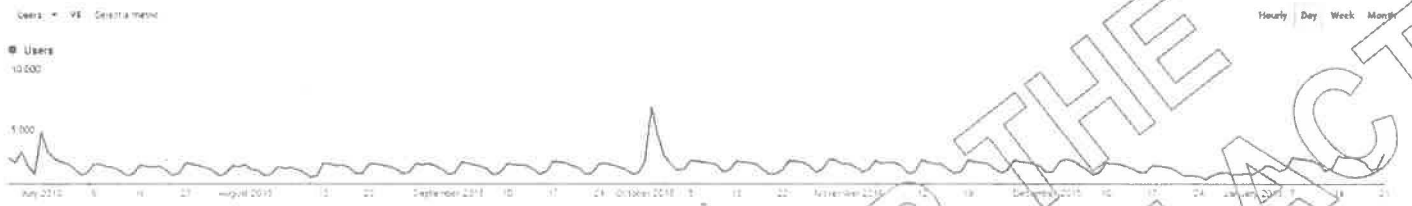
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OFFICIAL INFORMATION ACT

Appendix A Online Eligibility Guide

26 June 2018 – 21 January 2019

Visitor Numbers and Trends

Overview



Users

229,267



Avg. Session Duration

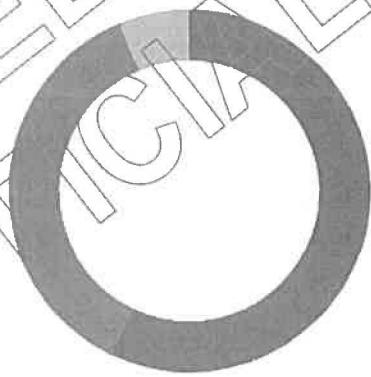
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Sessions by Device Type

New Zealand Visitors – By location

Sessions by device



Mobile

57.2%

↑13.3%



Desktop

36.5%

↓9.8%



Tablet

6.3%

↓3.5%

Jun 26, 2018 - Jan 21, 2019 ▾

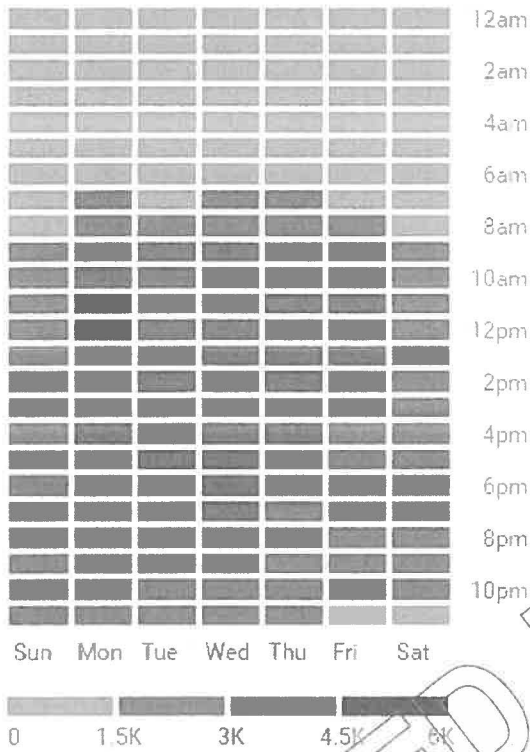
MOBILE OVERV

1

4,584

Visitors by Time of Day

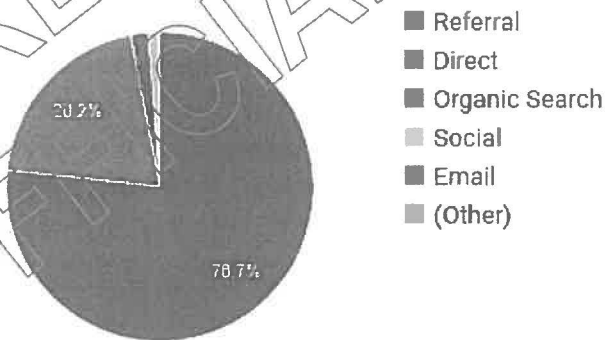
Users by time of day



Jun 26, 2018 - Jan 21, 2019

How do our visitors find the Guide?

Top Channels



What sites refer or link visitors to the Guide?

1. workandincome.govt.nz
2. nzherald.co.nz
3. labour.org.nz
4. services.workandincome.govt.nz
5. youthservice.govt.nz
6. msdsupport.custhelp.com
7. outlook.live.com
8. thespinoff.co.nz
9. d.skykiwi.com
10. hiya



Memo

To: The Organisational Performance Governance Committee

CC: Jo Cunningham, General Manager Strategy and Change, Service Delivery

From: 9(2)(a) [REDACTED], Principal Analyst, Service Delivery Strategy and Change

Date: 25 March 2019

Security level: IN CONFIDENCE

Driving Greater Uptake of Assistance

Purpose

- 1 This memo provides the Organisational Performance Governance Committee (OPGC) with an overview of the initiatives that are planned or being implemented which focus on driving greater uptake of the assistance provided by the Ministry.

Recommendations

- 2 It is recommendation that the Committee:
 - a. **Note** that there are a number of initiatives across the Ministry that are working to drive a greater uptake of financial assistance.
 - b. **Note** that the next update will be provided to assist the Committee to monitor the success and outcomes of these initiatives on 5 June 2019.

Background

- 3 Across the Ministry, there are a number of initiatives or programmes either underway, or in the planning phase that are working to drive a greater uptake of assistance.
- 4 These initiatives include:
 - The Online Eligibility Guide
 - Proactive Calls to Action (text messaging)
 - Proactive Client Entitlement (Analytics to the Frontline)
 - Enhancing Disability Allowance settings
 - A Temporary Additional Support campaign
 - Changes to hardship assistance processes to improve access for clients
 - A Full and Correct Entitlement initiative
 - A measure of clients receiving full and correct entitlement

Online Eligibility Guide

Service Delivery

Strategy and Change

Complete

- 5 As at 25 March 2019:
 - over 308,000 (compared to 229,000 as at 21 January 2019) people have visited the guide and spend an average of 4:59 using it, on average this equates to 45,000 visitors each week.
 - more than 80% of people complete all questions and are provided with information about the assistance that may be available to them.
- 6 In addition it has been found that approximately:
 - 65% of people use a mobile phone to access the guide, and 30% use a desktop device
 - 30% of the people that used the guide in February had used it previously.
- 7 **Appendix A** provides more detail about usage of the guide.
- 8 Feedback from both Better Every Day and Advocates highlighted that some people think that they are completing the actual benefit application form when using the guide. The intention of the guide is to provide an overview of assistance and services available based on collecting a basic set of information from clients regarding their circumstances. As a result, changes to the landing page providing clearer messaging that the guide is not an application will be implemented by the end of April.
- 9 Work is also underway to understand how information collected in the guide could be passed through to our online forms for those wanting to make an application for assistance.
- 10 A range of promotional activity is in progress to drive use of the guide. This includes:
 - the use of Google Adwords which are updated on a regular basis to reflect the time of year and factors that may impact on clients i.e. school uniform and start-up costs, seasonal work
 - messaging via digital signage in service centres

- messaging in MyMSD email notifications
- messaging in external newsletters including Super Seniors, Kotahitanga and the Building Financial Capability network.

11 Planning is also underway to see how a campaign approach can be used to contact clients who have recently left the benefit system, encouraging use of the guide so they are aware of what on-going assistance they may be eligible for. Additionally, flyers and promotional material are currently being developed for use in partner and non-government organisations.

Proactive Calls to Action

Service Delivery

Strategy and Change

■ In Progress

12 Through Proactive Calls to Action we are sending proactive text messages to clients.

13 The first pilot was undertaken between 10 December 2018 and 31 January 2019 where text messages were sent to a selection of 500 clients each week reminding them to renew their medical certificate.

14 The wording of the message that clients received was:

"Work and Income NOREPLY: Heads up. Your medical cert expires in 3 wks. You need to renew it to keep getting payments. Call us Mon-Sat for help or to stop texts."

15 Findings from the pilot include:

- a 9.89% increase in medical certificates that were renewed and submitted prior to their expiry
- three clients chose to opt-out of the notification service
- 97.5% of clients that were surveyed about receiving a message were positive about the service and advised that the message was useful to them.

16 The approach for implementing medical certificate reminders on an on-going, business as usual basis is now being finalised. When these reminders are fully rolled-out, approximately 475 text messages will be sent each day.

17 Feedback from clients who received a message during the pilot indicated that providing the medical certificate expiry date in the message would be helpful, and this change will be made as part of implementation.

18 The next pilot will test appointment reminders. Approximately 20% of booked appointments are not attended and will often mean that a client needs to book another appointment or be seen as a 'walk-in', as well as impacting on service availability to other clients. Non-attendance for particular types of appointments can also result in an obligations failure being initiated and associated sanctions. It is intended that the pilot will begin in four service centres by the end of April and will look to measure the whether the proportion of appointments attended increases as a result of clients receiving the reminder.

19 An additional pilot is planned for May for clients who exit into employment. There is not currently a good level of awareness among clients about the services and assistance available after they enter into work. Proactive messaging will be used to encourage the use of post-placement support and other financial assistance that is available, with the intention of supporting sustainable employment outcomes.

Proactive Client Entitlement initiative

Insights

■ Planning & Discovery

20 The Proactive Client Entitlement initiative is the second Analytics to the Frontline use case.

21 Through this initiative, a Queue Manager prompt and a simple user interface in CMS is being developed to enable case managers to identify clients who are likely entitled to supplementary assistance, but not receiving it.

22 The proof of concept phase will commence on 29 April 2019 to 10 May 2019 in the Nelson and Whangarei service centres, and focus on driving uptake of Temporary Additional Support (TAS).

23 During the proof of concept phase, the following areas will be measured and analysed:

- whether the CMS interface is used after a case manager is prompted in Queue Manager
- whether a subsequent application is made for TAS, and associated volumes
- whether core client information is updated after use of the CMS interface
- insights from responses received when case managers record why a client was not previously receiving assistance that the CMS interface indicated that they were entitled to.

24 Findings from the proof of concept phase will inform further development of the initiative.

Enhancing Disability Allowance settings

Service Delivery

Client Experience and Service Design

■ Planning & Discovery

25 A two stage programme for delivering options to enhance settings for Disability Allowance is underway.

26 The current focus is on engaging with clients and staff in three regions (Central, Taranaki and Waikato) to co-design solutions, on how we might:

- 9(2)(f)(iv) [REDACTED]
- change our Disability Allowance forms and other information to make them easier to understand and support an increased uptake.

- 27 Engagement is continuing with a range of key internal and external stakeholders including Beneficiary Advocates and our Principal Health and Disability Advisors on how to best work with health practitioners and non-government organisations.
- 28 Engagement with internal and external stakeholders is also planned to assess the possible impact of reduced verification.
- 29 This work will inform the development of and recommendations for a revised service approach for Disability Allowance that is easier for clients and supports an increased uptake. It is intended that the revised approach will be presented to the Service Delivery Design Committee by the end of May.

Temporary Additional Support campaign

Service Delivery

Strategy and Change

■ In Progress

- 30 In November and December, a campaign was undertaken where we contacted 2,915 people who were estimated to have an apparent deficiency in income of more than \$80 per week and were likely eligible for TAS. The campaign:
- increased take-up of payments by around 10 percentage points, over and above what would have occurred anyway
 - indicated that as well as increased TAS income, there was also a small increase in income from main benefit payments as a result of the pilot
 - made no difference to rates of recoverable SNG assistance, other supplementary payments, or benefit cancellations over the subsequent seven week period.
- 31 Work is now underway to implement proactive contact for clients who are likely eligible for TAS on an on-going basis, and is expected to go live in June.
- 32 Key components of the approach include:
- 3,000 clients will be contacted each month and these contacts will be staggered over the course of each month
 - clients will be contacted by email or letter, and in some instances both email and letter
 - clients will be encouraged to make contact with the contact centre to complete an initial screening in relation to their potential entitlement
 - an appointment will be made for the client to complete their application for TAS at their local service centre, where required.
- 33 The requirement to attend an appointment as part of this process is aligned to current policy and general practice. Further work is in progress to determine whether new applications for TAS can be completed by the contact centre.

Improving access to hardship assistance

Service Delivery

Business Process Management



Complete

- 34 A review of hardship assistance processes was recently completed and the following changes were implemented from 18 March 2019:
- removing the rules from MyMSD and changing contact centre processes to allow clients to apply through any channel they choose, as long as they have special need grant and/or advance entitlement
 - removing the obligation for clients to complete budgeting activities before they can get hardship assistance
 - removing the intensive interview that clients are required to participate in if they receive six or more hardship grants
 - removing the requirements for managers to approve hardship assistance when a client's hardship count is six or more.
- 35 Early reporting indicates that since the changes were introduced, 58.2% of all applications for food assistance made via MyMSD were eligible to be completed, compared to 34.7% for the month of February (an increase of 68%).
- 36 Further reporting will be made available in April to show how uptake and access has changed across all channels since 18 March.

Full and Correct Entitlement initiative

Service Delivery



In Progress

- 37 Service Delivery is preparing to commence Full and Correct Entitlement reviews from 1 April. The reviews will focus on 11,700 clients who are receiving a current payment and also have a section 192 reduction.
- 38 The initiative will be launched in selected regions and after learning from the initial engagements and review outcomes, we will progressively include all regions.
- 39 The agreed process for completing the reviews include:
- a desktop review of client records to compare current entitlement with information that is stored on the client record
 - extended attempts to contact all clients by phone to start the engagement and review process
 - face-to-face engagement will be scheduled and staff will complete a full review of all current income support (i.e. main benefit, supplementary support, Family Tax Credit) as well as reductions or deductions (i.e. section 192 reductions, debt offsets or redirections of benefit).
- 40 A business process and guidelines have been developed for staff to follow and will be reviewed soon after engagement has commenced to ensure that they are suitable for national roll-out.

- 41 Learning from the initial engagement activity completed as part of the initiative will be used to inform how we measure FACE.

Measuring Full and Correct Entitlement

Insights

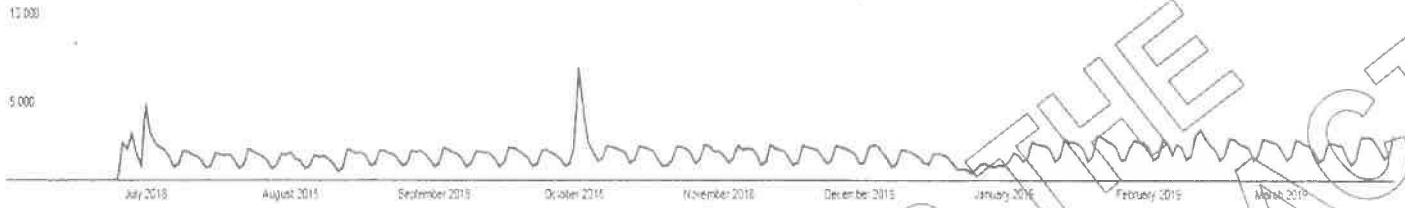
■ Planning & Discovery

- 42 A standardised and regularly reported measure of FACE will enable the Ministry to monitor the progress of initiatives to increase supplementary assistance uptake.
- 43 Work was previously underway to scope a proposed measure by the Reporting team in Insights. A key input into the development of the measure will be to individually review client records to better understand how FACE will be measured. Given the activity underway with the 'Full and Correct Entitlement initiative' described above, further development of the measure will continue once initial engagement activity is completed.
- 44 Additional updates will be provided as the Full and Correct Entitlement initiative continues.

Appendix A Online Eligibility Guide

26 June 2018 – 25 March 2019

Visitor Numbers and Trends



Users
308,643

Avg. Session Duration
00:04:59

Sessions by Device Type



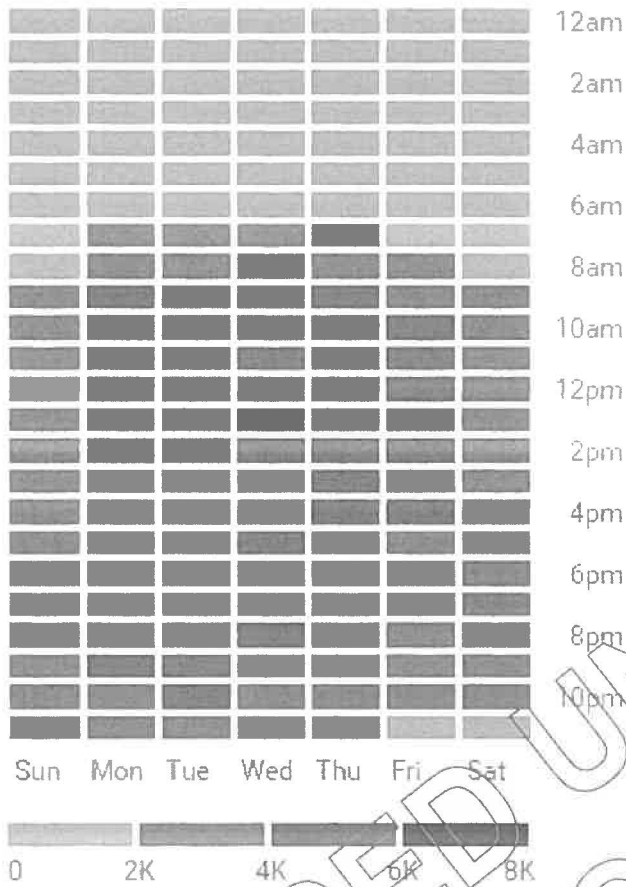
		
Mobile	Desktop	Tablet
58.7%	35.3%	6%

New Zealand Visitors - By location



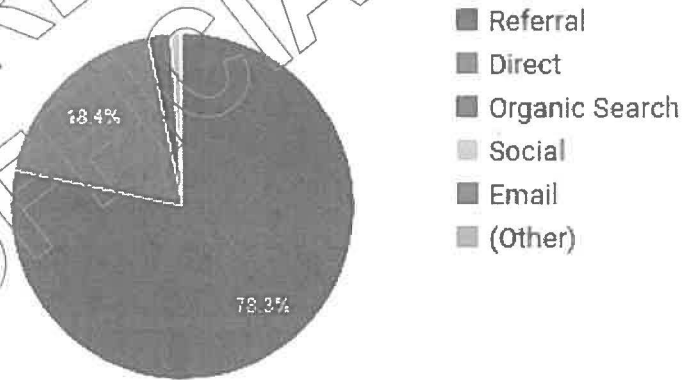
2  124,079

Visitors by Time of Day



How do our visitors find the Guide?

Top Channels



What sites refer or link visitors to the Guide?

1. workandincome.govt.nz
2. m.facebook.com
3. nzherald.co.nz
4. youthservice.govt.nz
5. services.workandincome.govt.nz
6. labour.org.nz
7. facebook.com
8. outlook.live.com
9. l.facebook.com
10. msdsupport.custhelp.com



Memo

To: The Organisational Performance Governance Committee

CC: Jo Cunningham, General Manager Strategy and Change, Service Delivery

From: 9(2)(a) [REDACTED], Principal Analyst, Service Delivery

Date: 29 May 2019

Security level: IN CONFIDENCE

Driving Greater Uptake of Assistance

Purpose

1. This memo provides the Organisational Performance Governance Committee (OPGC) with an overview of the initiatives that are planned or being implemented which focus on driving greater uptake of assistance provided by the Ministry.
2. The memo also recommends the OPGC consider a change in this memo's reporting frequency.

Recommendations

3. It is recommended that the Committee:
 - a. **note** that there are number of initiatives across the Ministry that are working to drive a greater uptake of assistance
 - b. **approve** a change in reporting frequency from two monthly to quarterly with the next update to be provided on 4 September 2019.

Background

4. Across the Ministry, there are several initiatives or programmes either underway, or in the planning phase that are working to drive a greater uptake of assistance.
5. These initiatives include:
 - The Online Eligibility Guide
 - Proactive Calls to Action (text messaging)
 - Proactive Client Entitlement (Analytics to the Frontline)
 - Enhancing Disability Allowance settings
 - A Temporary Additional Support campaign
 - Changes to hardship assistance processes to improve access for clients
 - A Full and Correct Entitlement initiative
 - A measure of clients receiving full and correct entitlement
 - Operational Excellence
 - Driving support for former clients.

Online Eligibility Guide

Service Delivery

Strategy and Change

■ Complete

6. As at 21 May 2019:
 - over 384,000 (compared to 308,000 as at 25 March 2019) people have visited the guide and spend an average of 4m:56s using it
 - more than 75% of people complete all questions and are provided with information about the assistance that may be available to them.
7. **Appendix A** provides more detail about usage of the guide.
8. A new feature is being scoped as part of the MyMSD roadmap which will allow for information that is collected in the guide to be passed through to our online forms for those wanting to make an application for assistance. This is planned to be implemented in the 2019/2020 financial year should funding be allocated.
9. In June, a campaign will start where contact will be made with clients who have recently left the benefit system, encouraging use of the guide so they are aware of what on-going assistance they may be eligible for. Additionally, flyers and promotional material are currently being developed for use in partner and non-government organisations.

Proactive Calls to Action

Service Delivery

Strategy and Change

■ In Progress

10. Through Proactive Calls to Action, proactive text messages to clients are being sent to clients.
11. Following a successful pilot, medical certificate reminders were fully implemented on 6 May 2019. Since these reminders were launched 6,172 reminders have been sent and

202 clients have renewed their medical certificate prior to it expiring. Detailed reporting relating to outcomes from this initiative will be available from June.

12. The next pilot underway tests appointment reminders. Approximately 20% of booked appointments are not attended and will often mean that a client needs to book another appointment or be seen as a 'walk-in'. The pilot started on 6 May 2019 and will finish on 14 June 2019.

13. During the pilot text messages are being sent to clients who have an appointment booked the next day, have a mobile phone, and have not previously opted-out of receiving proactive messages. The following service centres are participating in the pilot:

- Fielding Service Centre
- Manurewa Service Centre
- Napier Service Centre
- Wellington Service Centre.

14. The appointment types that clients will receive a reminder for include:

- New Business
- Maintenance
- Emergency
- Work Focused Case Management (Proactive and Reactive).

15. An example of the wording of the message that clients received is:

Work & Income NOREPLY: Hi. Your appt is on 17/12/18 @ 12:20. Please bring your ID, payment card, quotes and any other details you need. See you then.

16. The success criteria defined for the pilot includes a reduction in the no show rate by 5%. Prior to pilot commencing the average no show rate for the service centres included in the pilot was 19.6%. Since the pilot was launched, the average no show rate for these service centres has reduced to 15.7%.

17. Detailed reporting will be made available at the conclusion of the pilot and provided in the next update.

Proactive Client Entitlement Initiative

Insights

■ In Progress

18. The Proactive Client Entitlement initiative is the second Analytics to the Frontline use case.

19. Through this initiative, a Queue Manager prompt and a simple user interface in CMS is being developed to enable case managers to identify clients during appointments who are likely entitled to Temporary Additional Support (TAS), but not receiving it.

20. The proof of concept phase was conducted from 29 April 2019 to 13 May 2019 in the Nelson and Northland regions. This aimed to understand more about how to support case managers to proactively offer TAS to clients. After the prompt was presented to case managers, the following outcomes were captured:
- 31 applications for TAS were made, resulting in 29 grants
 - A reason was provided for eight clients who did not have an application processed after the prompt was presented to a case manager
 - 64 clients attended an appointment where an application for TAS was not made, and a reason for not processing an application was not supplied by the case manager that met with the client.
21. Analysis is now underway to better understand why case managers did not grant TAS for clients who were likely entitled with a view to improving how we improve the system prompts, as well as resources to support case managers to manage applications when they are engaging with clients.
22. This analysis will be used to inform recommendations for further development of the Proactive Client Entitlement initiative and is planned to be taken to the Analytics to the Frontline project board on 4 June 2019.

Enhancing Disability Allowance settings

Service Delivery	■	Planning and Discovery
<i>Client Experience and Service Design</i>		

23. A programme for delivering options to enhance settings for Disability Allowance is underway. This included both reducing verification and increasing uptake and awareness.
24. Since the last update, co-design work with clients and staff has identified that part of the original plan to simply reduce verification requirements will not deliver the improved client experience initially expected. This is because clients still need to specify their costs, which is a significant point of pain that will not change with reduced verification.
25. As many clients do not know their costs, they cannot specify their costs without gathering verification from a range of sources. This means that removing the requirement to verify costs has little or no positive change for clients.
26. Changes to primary legislation to deliver a significant difference for both clients and staff could be included in any work programme developed as a result of the Welfare Expert Advisory Group report recommendations relating to Disability Allowance. The Welfare Overhaul group are currently scoping this work programme.
27. The co-design work also told us that awareness of Disability Allowance does not always equate to understanding. Clients told us what they want to know and how they want us to communicate this information (e.g. format, language and channel).
28. Based on this information, an improved suite of Disability Allowance-related communications is being developed to support increased uptake and a better client experience. This includes changing the language used, providing more information

about allowable costs and what clients need to do to apply, and ensuring application forms include the required questions to reduce requests for additional information.

29. Options are also being investigated to determine how a wider range of communication channels could be used, including Maori and Pacific stakeholders, and what can be done to increase health practitioners' understanding about Disability Allowance.

Temporary Additional Support campaign

Service Delivery

In Progress

Strategy and Change

30. Work is progressing to implement proactive contact for clients who are likely eligible for TAS on an on-going basis and is expected to go live on 18 June 2019.

31. Key components of the approach include:

- 3,000 clients will be contacted each month and these contacts will be staggered over the course of each month
- clients will be contacted by email or letter, and in some instances both email and letter
- clients will be encouraged to make contact with the contact centre to complete an initial screening in relation to their potential entitlement
- an appointment will be made for the client to complete their application for TAS at their local service centre, where required.

32. Reporting to track outcomes from the campaign activity is currently being developed and will be available after the campaign is launched.

Improving access to hardship assistance

Service Delivery

Complete

Business Process Management

33. A review of Transition to Work Grant processes was recently completed, and the following changes were implemented from 27 May 2019:

- removing the requirement to complete a written application form in most cases
- removing the requirement for clients to provide evidence in most cases
- emphasising the importance of quality engagement and identifying other assistance that is available when a client exits to employment.

34. Reporting will be available from July to show how uptake and access changes as a result of the improvements made to the application process.

Full and Correct Entitlement initiative

Service Delivery

■ In Progress

Business Process Management

35. On 1 April 2019, a proactive campaign commenced with a group of sole parent clients who have a section 192 deduction applied. The objective of the campaign is to attempt to contact around 12,000 clients to complete a full review of their entitlement.
36. Engagement has started with client groups in a phased approach, starting with Youth Parent Payment clients (around 1,300 clients). The phased approach allows us to build an understanding of people's circumstances and issues related to full and correct entitlement (FACE), before working with people with more complex needs.
37. The next group of clients that will be engaged with are those who have had a s192 reduction in place for less than 400 days. Remaining clients have more complex circumstances and, in many cases, will require significant historical reviews because of the date that their s192 reduction was imposed.
38. So far, FACE reviews have been completed for 252 clients. Of these:
- 41 people (16%) had an increase in their payments, averaging \$33.74 per week
 - 2 people (1%) had a net reduction in the payments
 - 209 people (83%) had no change in their payments.
39. Additionally, 31 s192 reductions have been lifted:
- 9 because of an identified process error
 - 4 clients are now meeting the obligation
 - 18 clients provided new information.
40. As more is learned during this campaign, business processes will be reviewed so that the teams involved are better placed to complete the more complex review cases. A complex case is where there is insufficient information to explain or support the original decision to impose a s192 reduction. The project team is currently designing a framework for managing complex cases efficiently.
41. There are inconsistencies in the way that s192 is administered and there are areas of practice that can be improved until it is repealed on 1 April 2020. Work is now underway to:
- improve information internally and externally (MAP guidelines, doogle, external websites)
 - communicate the changes to frontline staff
 - introduce on-going monitoring for process assurance.

Measuring Full and Correct Entitlement

Insights

■ Planning and Discovery

42. Given the activity underway with the 'Full and Correct Entitlement initiative' described above, further development of Full and Correct entitlement measures will continue once initial engagement activity is completed.
43. Additional updates will be provided as the Full and Correct Entitlement initiative continues.

Driving support for former clients

Service Delivery

■ In Progress

Client Support – Debt Management

44. Many clients who move off main benefits owe the Ministry money. A new focus has been developed for Debt Management staff when making repayment arrangements with clients.
45. The objective is to agree on a sustainable repayment amount, rather than a higher repayment amount that may place them in hardship in the future or may stop them from participating in their communities.
46. In addition, where clients have limited disposable income and are not already receiving extra help, Debt Management will refer them, in the first instance, to the Work and Income website to access the Online Eligibility Guide and information about financial capability services. Clients can also be referred directly to our contact centres to test their eligibility for extra assistance.
47. Clients are also encouraged to access other support services, including:
- Inland Revenue for Working for Families/Family Tax Credits
 - their power companies to see if they are on the correct rate, e.g. low user rate
 - Money Talks (a free financial helpline)
 - Sorted.govt.nz.
48. Debt Management has an on-going relationship with a large number of non-current clients and is well placed to drive the uptake of available financial assistance for this group. Staff from the unit have also recently received training in Financial Capability which has broadened their knowledge on how to improve discussions with clients.

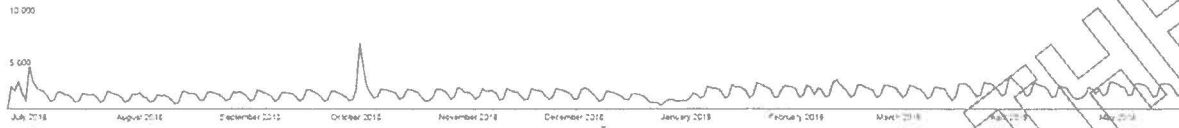
Frequency of reporting

49. Currently, this report is provided every two months for OPGC. With this process firmly embedded into our reporting cycle it has become evident that even with good progress on current and new initiatives being made each reporting period, there is not a significant enough stepped change. It is recommended that the report moves to quarterly, with the next report to be provided for the 4 September 2019 OPGC meeting.

Appendix A Online Eligibility Guide

26 June 2018 – 25 May 2019

Visitor Numbers and Trends



Users
387,050

Avg. Session Duration
00:04:57

Sessions by Device Type

Sessions by device



Mobile	Desktop	Tablet
60.2%	34%	5.8%

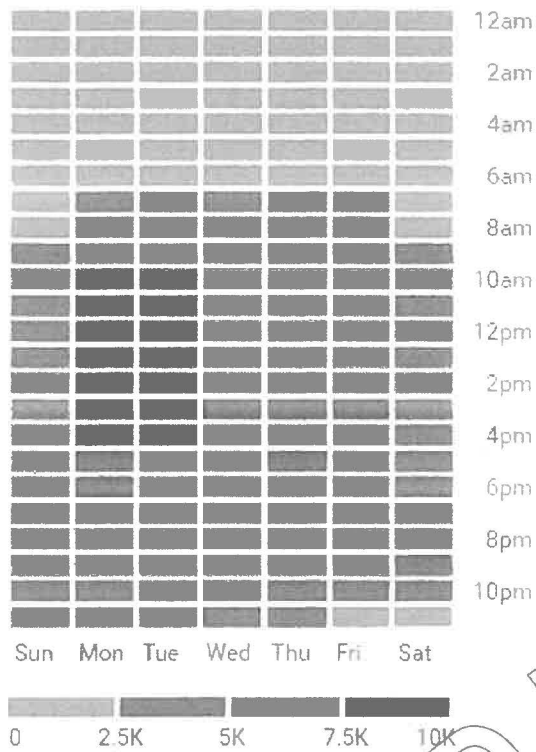
New Zealand Visitors – By location



2 155,666

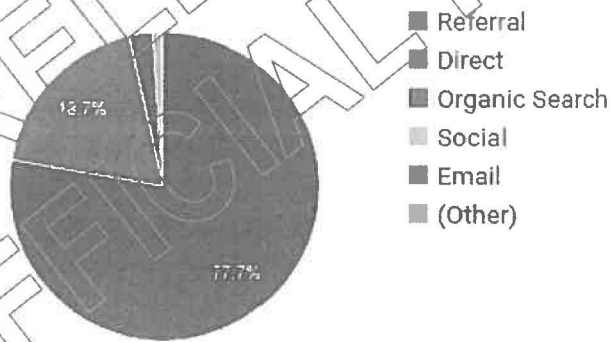
Visitors by Time of Day

Users by time of day



How do our visitors find the Guide?

Top Channels



What sites refer or link visitors to the Guide?

1. [workandincome.govt.nz](#)
2. [m.facebook.com](#)
3. [nzherald.co.nz](#)
4. [youthservice.govt.nz](#)
5. [services.workandincome.govt.nz](#)
6. [labour.org.nz](#)
7. [facebook.com](#)
8. [outlook.live.com](#)
9. [l.facebook.com](#)
10. [msdsupport.custhelp.com](#)