



11 February 2026

Tēnā koe

Official Information Act request

Thank you for your email of 16 September 2025 requesting information about service delivery channels moving from face-to-face to digital.

Please accept my apologies for the delay in providing you with this response.

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.

Question 1 Inbound contact volumes by channel

Annual totals (and monthly/quarterly if readily retrievable) for:

- *Phone: calls offered, answered, abandoned; average speed of answer; average handle time; call-backs offered/taken.*
- *In-person: service-centre visits (footfall), appointments booked/kept, average wait time; number of open service centres and weekly opening hours by site (see Part C).*
- *Digital:*

MyMSD: unique authenticated users; sessions; applications started/completed by benefit/type; document uploads; completion/success rate; drop-off rate.

Web forms/email/chat/SMS: interactions received; completion/success rates where tracked.

Please see **Appendix One** which provides the number of calls offered, calls answered, calls abandoned, average speed of answer, average handle time, call-backs offered and call-backs accepted across Ministry Business Units from 1 July 2020 to 30 June 2025.

Please refer to **Appendix Two** which provides the following tables:

- **Table One:** Number of appointments excluding seminar appointments and 'Supported Person' appointments in the financial years 2020/21, 2021/22, 2022/23, 2023/24 and 2024/25, by average and median wait time.
- **Table Two:** Number of appointments excluding seminar appointments in the financial years 2020/21, 2021/22, 2022/23, 2023/24 and 2024/25, by average and median wait time, and type of appointment.

Please refer to **Appendix Three** which provides the following tables:

- **Table One:** Number of MyMSD registered clients as at end of each month from 1 July 2020 to 30 June 2025
- **Table Two:** Number of MyMSD logins and unique clients during each month from 1 July 2020 to 30 June 2025.

The Ministry has one of the most flexible and geographically distributed workforces in the public sector, including:

- 122 Service Centres, two phone-based case management units, Contact Centres, Integrity Intervention Centres, and Centralised Service Centres.
- Our footprint means we are closely connected to communities and well positioned to work with Māori, clients, whānau, service providers and other agencies.
- Some of the Ministry's more rural service centres include Thames, Marton, Taihape, Taumarunui, Dannevirke, and Masterton, which all serve large geographic areas with dispersed communities.
- Beyond physical service centres, our capability extends through community-based and employer facing roles such as Employment Work Brokers and national support through Centralised Services and Contact Centres.

Our Service Centres are open from 8.30am - 5pm Monday, Tuesday, Thursday, Friday. On Wednesdays, these sites are open from 9.30am - 5pm.

There are also three smaller sites that have reduced operating hours:

- Ohakune site – 9.30am - 12pm, 1pm - 4pm, closed Wednesdays.
- Murupara site – 9am - 4pm Monday, Tuesday, Thursday, Friday.
10.30am - 4pm Wednesday.
- Takaka site – 8.30am - 12pm, 1pm - 4pm, Monday, Tuesday, Thursday, Friday.
9.30am - 12pm, 1pm - 4pm Wednesday.

On 2 November 2025, you clarified that the term completion/success rate (in the context of MyMSD) referred to data relating to successful and abandoned or otherwise failed attempts to complete workflows, signups, other 'transactional' type activities on the platform, similar to the drop off rate. You further clarified that you were looking for data that suggests the rate at which people are getting the information or successfully completing their intended activity on the platform.

We are unable to provide the MyMSD completion/success rate, the number of service centre visits (footfall), the number of appointments kept, the number of applications started and completed by benefit/type, the number of document uploads, and the drop-off rate as this information is not centrally recorded. This part of your request is refused under section 18(f) of the Act, as substantial manual collation would be required to collate this information. If held, this information would only be contained within individual client files, which would each require manual review to respond to your request. 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.

Question 2 Channel share

Share (%) of total client-initiated contacts handled via phone vs in-person vs digital (as defined above).

We are unable to provide this information as it is not centrally recorded. This part of your request is refused under section 18(f) of the Act, as substantial manual collation would be required to collate this information. If held, this information would only be contained within individual client files, which would each require manual review to respond to your request. 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.

Question 3 Failure/deflection metrics (if tracked)

- *Proportion of digital interactions that result in phone or in-person follow-up within 14 days (i.e., unsuccessful self-service).*
- *Top 10 error/failure codes or reasons for unsuccessful digital transactions (if recorded).*

On 2 November 2025, you clarified that unsuccessful digital transactions referred to reasons for failures/unsuccessful attempts at workflows, journeys, or 'transactions' be it payments or simply interactions with the platform.

Question 3 is refused under section 18(e) of the Act as this document does not exist or, despite reasonable efforts to locate it, cannot be found.

Question 4 FTE counts by function and channel (year-end snapshot for each year)

- *Service-centre front-of-house/case management FTE*
- *Contact centre agent/supervisor FTE*
- *Digital service support/product/engineering/analytics FTE (those primarily supporting MyMSD/online channels). Please include contractors/temps FTE-equivalents if reported separately.*

We have interpreted service centre front of house/case management roles to refer to all roles that contain Case Manager in the job title across Service Delivery.

We have interpreted contact centre agent/supervisor to refer to Customer Service Representatives and their line Managers.

Please see **Appendix Four** which provides the following tables:

- **Table One:** The number of Full Time Equivalent Case Manager staff, in the financial years 2020/21, 2021/22, 2022/23, 2023/24 and 2024/25
- **Table Two:** The number of Full Time Equivalent Customer Service Representatives and line Manager staff, in the financial years 2020/21, 2021/22, 2022/23, 2023/24 and 2024/25.

The part of this request that asks for an FTE count of digital service support/product/engineering/analytics (including contractors/temporary staff) is refused under section 18(f) of the Act. We are unable to provide this this

information as it is not centrally recorded. In order to provide you with this information, the Ministry would need to divert personnel from their core duties and allocate extra time to complete this task. The diversion of these resources would impair the Ministry's ability to continue standard operations and would be an inefficient use of the Ministry's resources. As such, your request is refused under section 18(f) of the Act, as it requires substantial collation. 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 requests 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.

Question 5 Non-personnel operating and capital expenditure related primarily to digital channels (excluding salaries):

- *Annual totals by programme/system (e.g., MyMSD, IVR/call routing, chat/virtual assistant, kiosks, identity/verification, CRM, analytics).*
- *For any vendor with annual spend >\$100k, provide vendor name and annual total (commercially sensitive pricing detail not required).*

Please refer to our previous response that is available on the Ministry website (13 June 2025): www.msd.govt.nz/documents/about-msd-and-our-work/publications-resources/official-information-responses/2025/june/13062025-information-or-analysis-about-the-usage-and-upgrade-of-mymsd.pdf?utm_source=copilot.com.

In order to provide you with the date range, additional categories, and vendor annual spend (over \$100,000) information that you have requested, the Ministry would need to divert personnel from their core duties and allocate extra time to complete this task. The diversion of these resources would impair the Ministry's ability to continue standard operations and would be an inefficient use of the Ministry's resources. As such, your request is refused under section 18(f) of the Act, as it requires substantial collation. 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 requests 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.

Question 6 Service-centre footprint and hours

- *Number of service centres open each year; new centre openings and closures of existing ones; changes to opening hours; adoption of appointment-only models where applicable.*
- *Count of self-service kiosks installed and retired each year.*

The Ministry has not opened any new sites during this period, therefore this part of your request is refused under section 18(e) of the Act as this document does not exist or, despite reasonable efforts to locate it, cannot be found.

Opening hours change during public holidays, and there are reduced hours for some sites. Smaller sites may also be closed during this time.

The part of this question that asks for a count of self-service kiosks that were installed and retired, and any site level variations to opening hours over a five year period is refused under section 18(f) of the Act. This information is not centrally recorded. In order to provide you with this information, the Ministry would need to divert personnel from their core duties and allocate extra time to complete this task. The diversion of these resources would impair the Ministry's ability to continue standard operations and would be an inefficient use of the Ministry's resources. As such, your request is refused under section 18(f) of the Act, as it requires substantial collation. 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 requests 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.

Question 7 Access and support for high-needs clients

- *Policies/criteria for face-to-face escalation/appointments for clients in hardship or with complex needs; any changes to these policies during the requested period.*
- *Use of interpreters, NZSL, and accessible service options (where tracked): annual totals of assisted appointments/interpreting sessions.*

The Ministry has Integrated Services Case Managers who can further support clients with high and complex needs.

Please refer to **Appendix Five** which provides the following resources that we have identified on the Ministry's Intranet as relevant to this part of your request:

- Our Case Management Services & Core Expectations
- Dedicated, Integrated Case Management
- Service Standards
- On the Radar: Deep Diver: Supporting Clients with high hardship needs.

In relation to any changes that were made between 30 June 2021 and 30 June 2025, Employment Case Management was reinstated following the COVID-19 pandemic.

We have interpreted interpreters, NZDL and accessible service options to refer to Supporting Participant appointments. Please refer to **Appendix Two, Table Three** which provides the number of Supporting Participant appointments in the financial years 2020/21, 2021/22, 2022/23, 2023/24 and 2024/25.

Please note that some information has been withheld as out of scope of your request.

Question 8 Decision records underpinning channel shift (2019–2025, or the earliest date you hold to 30 June 2025):

- *Business cases, options papers, risk assessments (including equity/Te Tiriti and disability/accessibility considerations), SLT papers, Ministerial/Cabinet papers, KPIs/targets for digital uptake, programme plans for channel migration, and any post-implementation reviews.*

This part of your request is very broad, and substantial manual collation would be required to locate and prepare all documents within scope of your request. As such, I refuse 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.

To be helpful, we are providing you with the following key publicly available decision documents that are relevant to this part of your request:

- Strategic Assessment, Cabinet Paper and Cabinet Minutes – November 2021
- Programme Business Case, Cabinet Paper and Cabinet Minutes – May 2022
- Detailed Business Case, Cabinet Minute – June 2023
- Gateway Review Report – December 2023
- Programme Briefing – December 2023
- Detailed Business Case for remainder of the programme and cabinet minute – December 2024

You can find this information on the Ministry website, we are providing the publicly available link here: msd.govt.nz/about-msd-and-our-work/work-programmes/te-pae-tawhiti/documents.html

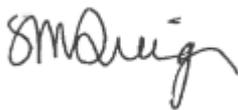
I will be publishing this decision letter, with your personal details deleted, on the Ministry's website in due course.

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.



Anna Graham
General Manager
Ministerial and Executive Services

Our Case Management Services & Core Expectations

Helping people, whānau, families and communities is at the centre of what we do.

On this Page:

Our case management service strives to help New Zealanders build the capabilities they need to contribute positively to their communities. Whatever the situation, we try our best to understand and connect people with all the support we can. We seek to do this with integrity and compassion, driven by our purpose to help New Zealanders be [safe, strong, and independent](https://doogie.ssi.govt.nz/about-us/purpose-and-values/index.html) [<https://doogie.ssi.govt.nz/about-us/purpose-and-values/index.html>].

Case managers work in an integrated way to serve the people that we come into contact with. Some clients will require financial support to alleviate their financial situation while others seek services to help re-enter the workforce. They may be a disabled person seeking temporary or permanent assistance to lead an independent life, a family dealing with violence, a person needing a safe, warm, and dry home, a parent needing help with the costs of childcare, or an older New Zealander applying for superannuation. Clients expect us to understand them and their whānau, help them in the way they need it, and for us to follow through and do it.

Woven into the fabric of our service are Manaaki, Whānau, Mahi tahi and Tika me to pono – the [four values that guide](https://doogie.ssi.govt.nz/about-us/purpose-and-values/index.html) our behaviour. Our four values are an expression of who we are and what we stand for. By working together, we can make a positive change for New Zealand.

Through our case management service, we provide the following help:

[Case Management Services \(PDF 66.04KB\)](#), [<http://doogie/documents/business-groups/helping-clients/work-and-income/our-service/case-management-services/case-management-services.pdf>]

Employment support and services

Connecting clients to employers and job opportunities, upskilling clients through linking them with industry-based recruitment partnerships and supporting responses to the local labour market by working with

regional employment teams through Employment Case Management, Employment Case Management - Reserve, and Phone-based Case Management.

[Employment Case Management, Reserve, and Phone-based Case Management](https://doogie.ssi.govt.nz/business-groups/helping-clients/work-and-income/our-service/case-management-services/employment-case-management.html) [<https://doogie.ssi.govt.nz/business-groups/helping-clients/work-and-income/our-service/case-management-services/employment-case-management.html>].

[Our employment service](https://doogie.ssi.govt.nz/business-groups/helping-clients/service-delivery/employment/our-employment-service/index.html) [<https://doogie.ssi.govt.nz/business-groups/helping-clients/service-delivery/employment/our-employment-service/index.html>].

Income support and superannuation services

Including benefits, hardship assistance, New Zealand Superannuation, accommodation-related support, and help for people with young families

[Supporting Seniors Clients](https://doogie.ssi.govt.nz/business-groups/helping-clients/work-and-income/our-service/case-management-services/supporting-seniors-clients.html) [<https://doogie.ssi.govt.nz/business-groups/helping-clients/work-and-income/our-service/case-management-services/supporting-seniors-clients.html>].

Housing support

Assessing people's eligibility for, and referring them to, emergency, transitional and public housing, and providing grants and recoverable assistance to help with housing costs.

[Social housing, Transitional and Emergency Housing](https://doogie.ssi.govt.nz/resources/helping-clients/procedures-manuals/social-housing/index.html). [<https://doogie.ssi.govt.nz/resources/helping-clients/procedures-manuals/social-housing/index.html>].

All Case Management Core Expectations

An integrated approach

It's expected that an integrated case management approach (responding to income, housing, and employment needs) is applied across our case management services.

This means, where possible, that clients should be able to resolve their needs across the range of our services with their Case Manager, and the need for further contact by other case managers or service lines is minimised.

Caseloads and engagement standards:

Caseloads are maintained at full capacity at all times, and clients are selected for service in line with national cohort priorities. Every client included in case manager's caseload has a future engagement booked which is aligned to their plan (excluding suspended clients and people who have an active obligations failure).

Clients have an active MyMSD profile

Clients who have full or partial work obligations have:

A completed Jobseeker Profile.

An up-to-date CV saved in CMS

An open [Individual Employment Plan \[https://dooglegovt.nz/business_groups/helping_clients/work_and_income/our_service/case_management-services/individual-employment-plan.html\]](https://dooglegovt.nz/business_groups/helping_clients/work_and_income/our_service/case_management-services/individual-employment-plan.html), (IEP) with assigned relevant activities

A completed Pathways to Employment (PTE) plan, where appropriate

Referrals to Virtual Talent Pools (VTP), where appropriate.

Completed work-related engagement logs outlining discussions and any referrals.

Clients who have full or work preparation obligations have:

An open Individual Employment Plan (IEP) with assigned relevant activities

Clearly identified plans relating to their goals and aspirations

Complete engagement logs outlining plans and next steps and any supports being provided

Clients are referred to contracted services or work services teams, including profiling to work brokers, where appropriate

At each engagement the following areas should also be checked to see if any further needs can be resolved:

Clients eligibility to Jobseeker Support, Sole Parent Support etc, including checking partner's circumstances (if they have one)

S2P Service Centre Referral queue

Client event notes in progress, on hold or ready for processing

SWIFTT expiries (i.e., reapplications)

Redirections and debt offsets

Engaging with clients for the first time

The first appointment with a client should be face-to-face, focused on building a relationship, understanding the client's situation, and identifying their skills and things they have to manage, if appropriate at the initial appointment.

Ways to engage with a client for their first appointment

Verify client's identity in line with Ministry identification standards and save any evidence to client's record in CMS.

Contact client by phone in first instance, introduce yourself, your role and that you would like to meet face-to-face.

Send a letter to the client, inviting them to attend a proactive appointment.

Send a text message introducing yourself and that you have attempted to make contact and you will call the client at a certain time.

Key areas to focus on

Take time with the first appointment, to outline mutual expectations of the relationship.

Be clear that your role is to support and encourage the client as they work through what they need on their journey.

The first appointment should be positive, using clear language and open questions.

Acknowledge and recognise the client's efforts and what has worked well so far and use a strength-based approach to gather information and build rapport.

Acknowledge the client's skills and aspirations.

Ensure that the client is getting their full and correct entitlement.

Ensuring that the case management relationship has strong foundations

As part of initial engagement, clients should be made aware of the following key aspects of their case management relationship:

their Case Manager will continue to have a relationship with them until they have found employment or achieved their goals, with appropriate referrals to post-placement support where necessary.

their Case Manager is responsible for meeting the client's income, housing, and employment needs, and should be their first point of contact for any requests.

the contact details (name, phone/mobile and email) for their Case Manager to make direct contact when they need assistance.

Identifying next steps and planning future engagement

The information gathered during the interview should provide a better picture of the client's history, and future goals. This information can be used to outline clear steps and timeframes the client commits to working towards and prepare for the next appointment.

If the client has talked about work goals, you can also provide information about the local labour market, contracted services that may be suitable, or help available from the work services team.

A future engagement should be arranged at each appointment that a client attends.

On-going engagement

There is no one size fits all when engaging with clients. Through on-going engagement, it's expected that case managers will coordinate access to income, housing, and employment services, with a focus on identifying opportunities to support clients towards their goals and aspirations, alongside supporting things that need to be managed.

The frequency of engagement should be agreed between the client and Case Manager based on the clients next steps and plans the client has agreed to. The preferred method for engagement is face-to-face, and appointments should be at least every 28 working days as a minimum.

Service Standards

This page outlines the minimum standards required by case managers when supporting clients and their whānau:

[Service Standards \[https://dooglessi.govt.nz/business-groups/helping-clients/work-and-income/our-service/case-management-services/service-standards.html\]](https://dooglessi.govt.nz/business-groups/helping-clients/work-and-income/our-service/case-management-services/service-standards.html)

Supporting sustainable employment

There are a range of factors that case managers should consider, to ensure that they're able to support people into work well. This includes:

Access to on-going supplementary assistance and payments such as the Work Bonus

Transition to Work Grant

Relocate for work – meets criteria and has secured sustainable employment if needs to relocate.

Access to Childcare Assistance

Transition of Working for Families Tax Credits to Inland Revenue

Connection to work services teams and In-work Support to provide a stair-cased option for post-placement support.

Debt suspension for 3 months and discussion on how client will manage repayments of outstanding overall debt with other parties.

It's expected that an agreement is reached between the client and Case Manager about the period that the Case Manager will continue to provide direct support (i.e., financial assistance, coordination, and access to other services).

Content owner: [Client Service Delivery](#) Last updated: 15 September 2025

Dedicated, Integrated Case Management

This section provides more information about our dedicated, integrated case management services, including Dedicated Case Management, Integrated Case Management (including Housing), Supporting Offenders into Employment, Contracted Remand Sentenced, and Paiheretia Te Muka Tāngata.

On this Page:

Expectations

It is expected that staff in a dedicated and integrated case management services align their work with the **Core Expectations and Service Standards**

Maintaining full caseloads at all times

Engaging appropriately, regularly, and correctly *where applicable*

Working with clients and their complex needs

Those with work obligations have the appropriate employment tools (JSP, IEP, etc *where appropriate*)

Case managers are providing their contact details

Service standards are being upheld

Here you will find the **full core expectations**: [Case Management Core Expectations \[https://doogie.ssi.govt.nz/business-groups/helping-clients/work-and-income/our-service/case-management-services/case-management-services.html\]](https://doogie.ssi.govt.nz/business-groups/helping-clients/work-and-income/our-service/case-management-services/case-management-services.html).

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Managing caseloads

Integrated Services (Housing, SOE, Remand etc)

must be at **60**

Monitors and measures

To make sure we are on the right track, there are a few key measures to keep in mind

Monitor	Target	Definition
Accuracy	95%	Standard definition
Client requests	Monitor	8-12 minimum client requests completed daily on average. This can include completing: appointments, any client event in a CMS work queue including work from Ready for Processing, Work on Hold and Approval queues, and work from S2P queues
Completion Rate	Monitor	7+ appointments completed as 'show' daily on average
Return rate	Monitor	Monitor % of clients returning for the same appointment type within 7 working days
New client appointments	90%	New clients to service seen face to face (phone for PBCM) within 10 working days of being assigned to caseload (excl. GCM and transfers)

Service Standards

This page outlines the minimum standards required by Case Managers when supporting clients and their whānau.

On this Page:

Client Service Principles and Standards

Service Centres will deal with incoming client demand and either complete the request or book an appointment with the site (face-to-face or phone).

If a client presents with a need at any Service Centre, the site will respond to the request (client won't be advised to phone the Contact Centre)

If a client requests a face-to-face appointment, the Service Centre should meet that need and book an appointment

Staff in regions will complete adequate screening for any Housing Assessment and EH SNG requests

Managing Service Centre Referral requests in S2P

A minimum of three contact attempts should be made before a task is closed

Review task and client's CMS record before contacting client

Confirm client's contact details and circumstances

Identify and resolve any further needs such as:

Client Events in progress in CMS, on hold or ready for processing

SWIFTT expiries (i.e., reapplications)

checking redirections and debt offsets

Use '25' as a prefix when the call is made so that the number displayed is 0800 559 009

Let the phone ring to voicemail and try again, if necessary, before re-queuing

If the client's outgoing message for their voicemail identifies them, leave a message advising we will try again.

All engagement should be recorded in CMS, including unsuccessful contact

If a client has an agent, their identity must be verified before the call continues

If a task has been assigned to the wrong Service Centre, this can be reassigned to the correct site by using the "Reassign to Region/Site" resulting option in S2P with a selectable list of 13 regions, then sites that will be available to choose from. The original appointment task/need will then be reassigned to the correct site.

Outbound calling - privacy and identifying clients

We need to make sure we identify all callers we speak to before discussing/releasing any client information when we're making outbound calls.

As Ministry employees, we handle a lot of clients' personal information. It's important that we're 100% confident we're talking to the right person every time.

Before you release any client information, you must have thoroughly identified the caller, you need to do this by:

- Confirming their identity – is it the client we're calling, an agent or third party?
- Use verification questions to further confirm their identity

Verifying questions

Examples of good verifying questions:

- Their full name, including middle names
- Their benefit type(s) and how much they get
- What day they get paid from us, and who they bank with
- What their current address is, and their previous address
- Their partner's and children's details, if relevant
- Previous employment or contracted services they're engaged with
- When they last had an appointment with a/their Case Manager, and what it was about
- Their IRD number, email address, and phone number on file

This type of questioning will help you be more confident that the person's identity is genuine.

Unsuccessful contact when calling phone appointments

If the client can't be contacted, ensure that notes are added to the client's Engagement Log. Use the following scripting to leave a message when we've attempted contact and the outgoing message for the client's voicemail identifies them.

If voicemail does not identify client, but you can confirm from previous interactions/records held in CMS that the number belongs to the client, the message left should be minimal.

Unsuccessful contact (Attempt 1 or 2) when voicemail identifies client

Kia ora [client name]. It's [case manager name] from Ministry of Social Development. We're trying to contact you regarding your request for assistance. We will try you again shortly.

Unsuccessful contact (Attempt 3) when voicemail identifies client

Kia ora [client name]. It's [case manager name] from Ministry of Social Development. We're trying to contact you regarding your request for assistance. We've tried twice at [day/time] and [day/time]. If you still need help, please call us on 0800 559 009.

Unsuccessful contact when voicemail does not identify client

Kia ora [client name], this is [case managers name] from Ministry of Social Development, could you give us a call on 0800 559 009.

No further detail should be given in case someone else intercepts the voice message. If you are not sure the phone number belongs to the client, you **cannot** leave a voice mail. Make clear notes in CMS so that the next staff member can follow up with the client directly.

Calendars and appointment availability

All case managers must have a calendar set up in Q-Manager. Client Service Delivery (CSD) are implementing standardised calendars for all case managers from 1 July 2025.

Key principles for calendar management are:

Case manager profiles are set up correctly in Q-Manager so appointments can be booked by Contact Centre and regions staff.

The national CSD calendar template examples are to be used in principle for all case manager calendar set up.

Calendars open and functional for bookings, not locked or bookings controlled by the site.

Managers will review calendar set up in Q-Manager for all case managers at least every 3 months.

The primary meeting time is the staff Wednesday Brief for all sites.

All case managers working full-time will have a minimum of 5 hours for appointments with clients if available, factoring in 1.5 hours breaks and a maximum 1 hour of admin time daily.

1 hour daily admin time can be built in if the case manager needs this. Admin time could include processing from work queues, reading In the Loop and email.

Managers and case managers can both identify when admin time can be scheduled into calendars, so long as there's no significant impact on our service. This time needs to be blocked out and managers need to make sure there aren't too many people doing admin at the same time.

The standard time for most appointments is 30 or 60 minutes, but if a client needs longer, that's OK. There's no change to our flexibility.

General, seniors and integrated services case managers can have two slots for 60-minute meetings for more complex appointments such as new applications.

Employment case managers can have a minimum of nine proactive 30-minute appointments a day.

Some general case managers who manage bookings for the site such as new applications, can have more 60-minute slots available to meet demand.

Newer case managers can have longer appointment times to help embed learning.
Generally, calendars to have a minimum of 8-10 appointments daily.
Minimum appointment duration is 30 minutes.

Case managers are responsible for:

- Blocking out the hours they do not work.
- Blocking out planned leave.
- Blocking out time where they are not available and noting the reason (e.g. meetings, administration time).
- Making at least 60 to 90 minutes available each day for reactive appointments (**case managers with caseloads**).
- Clearing an appointment so it becomes available again if there is a cancellation before the appointment time.
- Contacting clients who don't attend their appointment to arrange another time, if necessary
- Resulting each appointment following the appointment time. More information about how to set up calendars is available on Doogie.

More information about how to set up calendars is available on [Doogie \[http://doogie/business-groups/helping-clients/work-and-income/our-service/case-management-services/q-manager-and-s2p-for-staff.html\]](http://doogie/business-groups/helping-clients/work-and-income/our-service/case-management-services/q-manager-and-s2p-for-staff.html).

Calendar templates can be found here [standardised case manager calendar templates \[https://doogie.ssi.govt.nz/documents/business-groups/helping-clients/work-and-income/our-service/case-management-services/csd-standardised-cm-calendar-templates.pdf\]](https://doogie.ssi.govt.nz/documents/business-groups/helping-clients/work-and-income/our-service/case-management-services/csd-standardised-cm-calendar-templates.pdf).

Recording Walk-ins

A walk-in appointment should be recorded in Q-Manager for all clients who walk into sites and who don't have a booked appointment and see a Case Manager face-to face in the Service Centre to have their needs met.

The walk-in recording function in Q-Manager is not to record:

- Scanning documents
- Forms submitted by clients
- Issuing of payment cards or payment card management
- General queries
- Processing actions done by case managers
- Sighting of identification
- Authentication actions

Buddies

Every Case Manager should have a buddy identified in Global. The purpose of a buddy is to act as an alternative contact for clients if a Case Manager is on leave or not available, including any appointment requests.

Emails

Emails received by case managers should be acknowledged within 24 hours. This will ensure the client knows that the email has been received and what action has been taken, where appropriate. Case managers can either phone the client or email a reply.

If phone contact is made, the client's Engagement Log should be updated to record the outcome of the call. If there is no reply when responding, add a note to the client's Engagement Log to record that an attempt was made to contact the client, and include the date and time of the call.

If the response is made by email, a copy of this should be added to the client's Engagement Log

Planned leave

If a Case Manager is on planned leave, an Out of the Office message should be added in Microsoft Outlook with clear contact instructions for their buddy.

Unplanned leave

If a Case Manager is on unplanned leave for more than a day, an Out of the Office message should be added in Microsoft Outlook using the [form available on Doogie \[https://forms.ssi.govt.nz/dap_login?orig_path=%2Fforms%2Fnew%3Fform_template_public_name%3DOut%252Bof%252Boffice%252Bmessage%252Bform\]](https://forms.ssi.govt.nz/dap_login?orig_path=%2Fforms%2Fnew%3Fform_template_public_name%3DOut%252Bof%252Boffice%252Bmessage%252Bform), with clear contact instructions for their buddy.

Setting up Voicemail

All instructions can be located here - [Microsoft Teams Calling \[https://msd.govt.nz/sharepoint.com/sites/365/SitePages/Microsoft-Teams-Calling.aspx?xsdata=MDV8MDJ8bWV5YW5pZS5uZXBIMDAXQG1zZC5nb3Z0Lm56IDMxYzhzZGE2YmJlMzQ2ODE5NjYxMDhkZDkyODdiODkyfGU0MGMOZjUyOTIIZDRkNGZiZjZDAwMWEyY2E2NTU2fDB8MHw2Mzg4Mjg\]](https://msd.govt.nz/sharepoint.com/sites/365/SitePages/Microsoft-Teams-Calling.aspx?xsdata=MDV8MDJ8bWV5YW5pZS5uZXBIMDAXQG1zZC5nb3Z0Lm56IDMxYzhzZGE2YmJlMzQ2ODE5NjYxMDhkZDkyODdiODkyfGU0MGMOZjUyOTIIZDRkNGZiZjZDAwMWEyY2E2NTU2fDB8MHw2Mzg4Mjg). Voicemail should be checked for messages at least twice daily and phone calls returned within 24 hours.

Microsoft Teams Calling – Guidance

Teams calling has its own Voicemail system, giving you the option of allowing both internal and external people to leave a message if you miss their call.

Standard voicemail message

To configure your Voicemail, go to your Teams settings (the three dots next to your profile picture), select **Calls** and then click **Manage voicemail**.

Click **Record a greeting** to record your own message for voicemail. Follow the voice prompts to set this option up. You may want to use this example: "Kia ora, you have reached [Your name], please leave your name and number and I will contact you as soon as possible."

If you're unsure of what to include in your voicemail greeting, please consult with your manager.

Alternatively, you can also use the **Text-to-speech customized greeting** option and type your voicemail greeting into the text field. Change the accent by selecting a language from the drop down menu.

Once you're done remember to click **OK** to save your changes.

Contact the [Service Desk \[https://doogie.ssi.govt.nz/helping-you/msd-service-desk/hardware/phones/cisco-ip-phone/voicemail-unity.html\]](https://doogie.ssi.govt.nz/helping-you/msd-service-desk/hardware/phones/cisco-ip-phone/voicemail-unity.html) for help and technical support (i.e. you get an error message when attempting to make a call)

Leave message

Kia ora and welcome to the Ministry of Social Development, this is [case manager's name]. I am not available until [insert return date]. If you wish to speak to someone now, please contact [buddy's name and contact number]. Alternatively, you can call our general enquiries number on 0800 559 009.

Client Requests to Transfer Service Centre

Service Delivery areas

The Ministry's Service Delivery Areas serve primarily as a planning tool within the Ministry, enabling the effective distribution of resources, staffing, and service delivery across regions. They help ensure that services are strategically allocated to meet the specific needs of different communities, assist in forecasting demand, and optimise service centre operations. By using these boundaries, the Ministry can ensure that appropriate support is available where it is most needed.

Clients are assigned to the service centre closest to their residence as convenient for clients to access local services and staff are familiar with local support services and community knowledge in their location.

Open door policy

MSD upholds an open-door policy, meaning clients are not limited to a specific service centre based on their residential location or designated catchment area. Clients can visit the service

centre that is most convenient for them to for services. This approach provides greater flexibility and ensures clients can access the support they need in a timely and accessible manner.

Managing requests from clients

Clients can request a change in case managers or service centres, and can make this request in writing, along the reasons for the change. MSD can consider the request and make changes when there are valid reasons to do so, in conjunction with Managers of the Service Centres involved.

Content owner: [Client Service Delivery](#) Last updated: 13 October 2025

Released under the Official Information Act (1982)



**MINISTRY OF SOCIAL
DEVELOPMENT**
TE MANATŪ WHAKAHIATO ORA

On the Radar

What you need to know this week

Monday 1 August – Sunday 7 August 2022



Manaaki • Whānau • Mahi tahi • Tika me te pono

On the Radar

Welcome to On the Radar!

This week, we're covering changes in how to support clients with high hardship needs,

Out of scope

Out of scope

Out of scope

- **Deep Dive: Supporting clients with high hardship needs**

- Out of scope

- Out of scope

- Out of scope

Deep Dive: Supporting clients with high hardship needs

From Monday 8 August, contact centres will start to refer clients with a high hardship count (31+ requests within the year) to service centres, for the client to get an assigned case manager going forward.

Most of these clients could already have an assigned case manager, as regions should be actively monitoring high hardship users through the High Hardship Count report in SAS VIYA.



Let's break down what this means for different team members:



CSRs

Decide on the client's immediate needs, refer unassigned clients to their home Service Centre Site F2F appointment queue, and provide notes.

Connectors

Need to be aware of the new tasks that will be coming through to site F2F appointment queues.

Case managers

Keep space in your O-Manager calendars for your reactive appointments.

Managers

Monitor requests in your site F2F queues to ensure you are cleared within 24 hours.

On the next slide, we'll cover more extensive changes...

Deep Dive: Supporting clients with high hardship needs cont.

If the client is unassigned:

CSRs will:

- Discuss the immediate need and make a decision
- Refer the client to their home Service Centre Site F2F appointment queue
- Provide notes:
 - Client has high hardship count and needs an assigned case manager
 - Any relevant details about the client's situation
 - Any further needs that may be required



The **connector** will be required to:

- Determine what case management service will meet the client's needs
- Assign a C19 CM or ISCM and add appropriate programme tag in CMS
- Complete the task in S2P

The new assigned **case manager** will:

- Review the client's circumstances and follow-up if required
- Get client's contact details (phone or email)



Client already assigned to a case manager?

CSRs will book client into their assigned case manager's Q-Manager calendar

or:

- a buddy (if case manager is unavailable)

or:

- Refer to the Site F2F appointment queue, if can't book with C19 CM or buddy (existing process)



More information:
[Hardship assistance - HIYA](#)