MINISTRY OF SOCIAL DEVELOPMENT
TE MANATŪ WHAKAHIATO ORA

2 June 2026

Tēnā koe

Official Information Act request

Thank you for your email of 10 April 2026, requesting information about MyMSD document uploading procedures, failure logs, and records relating to the documents you uploaded.

Within your request, the following questions fall within the scope of the Official Information Act 1982 (the Act):

(a) Any records, reports, or communications concerning failures, faults, errors, or technical issues affecting the MyMSD document upload system.

(b) The Ministry's policies and procedures for handling documents uploaded via MyMSD, including how uploaded documents are directed to the relevant processing teams.

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

- *Any records, reports, or communications concerning failures, faults, errors, or technical issues affecting the MyMSD document upload system.*

Please find attached **Appendix One**, which details recorded issues with the MyMSD document uploading system from February 2025 to April 2026.

Of the incidents affecting document uploads to MyMSD during this period, one was identified as impacting more than one client.

Please note that the data has been consolidated into a table as a summary of the incidents, in accordance with sections 16(1)(e) and 16(2)(c) of the Act.

Details of the incidents themselves 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.

- *The Ministry's policies and procedures for handling documents uploaded via MyMSD, including how uploaded documents are directed to the relevant processing teams.*

Please find attached **Appendix Two**, which outlines the document upload process within MyMSD.

In addition, I have attached the links referenced in **Appendix Two:**

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

- **Appendix Three**, which provides guidance on next steps in MyMSD for current applications; and
- **Appendix Four**, which explains how staff can enable clients to upload further documentation through the Customer Management System (CMS), where additional information is required as part of an application.

Document upload can be enabled in two ways. The first is through some flows within MyMSD, for example applications for working age benefits. When these are uploaded, they are sent through to a queue for staff to action. The second is when a staff member enables upload. When this happens, anything uploaded needs to be manually linked to the client record by the staff member, so requires the staff member to remain connected to the client (for example a Customer Service Representative on call with a client), or the client has to contact the Ministry of Social Development to advise that they have uploaded the required documents.

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

Upload documents into MyMSD - Process

We've been making improvements to MyMSD to make it easier for clients to apply online, such as uploading their documents.

On this Page:

Uploading documents when applying for a main benefit or pension

People can upload their own, or their partner's, documents into MyMSD when they apply for a main benefit or pension. Once a client has completed their online application form, they are asked to go to the 'Next Steps' section in MyMSD. Here, they can upload documents and read and agree to their obligations.

After the documents are uploaded, they'll show in the 'scanned documents' tab in CMS. You'll need to save and publish these to the client record. People can upload more if needed until the application summary has been set to 'completed' in CMS or the lapse date has passed.

To assist clients with uploading documents as part of their next steps, and see how MyMSD & CMS interact, download MyMSD next steps for current applications (pdf) [http://doogle/documents/resources/helping-clients/products-services/service-delivery/mymsd/mymsd-current-applications-document-upload-next-steps-and-cms-integration-updated.pdf] .

Verifying or providing Identity documents when applying for a main benefit or pension

Clients applying through MyMSD for ongoing financial assistance can choose to verify their identity online using Identity Check. Identity Check will be part of the MyMSD application process and is provided by Te Tari Taiwhenua | Department of Internal Affairs (DIA).

Further information around the business background of Identity check can be found here. [https://doogle.ssi.govt.nz/resources/helping-clients/procedures-manuals/work-and-income/client-identity/identity-check.html]

Uploading documents to MyMSD while on the phone with a client

Through CMS, you can activate an option in MyMSD for the client to upload their documents while on the phone with you.

Quick steps

Go to the Client file – Home page 'action menu' in CMS

Select 'Enable MyMSD Document Upload'

Under Number of days select 'Today'

Select 'Yes'

The client can then go to the 'MyProfile' section on MyMSD to upload their document.
5a. If a client isn't logged into MyMSD when you enable document upload, when the client logs in they'll see an 'Upload your documents' tile on their dashboard. Clicking this will also take the client straight to the upload document screens.

Select 'Disable MyMSD Document Upload' in the 'action menu' when client is finished uploading.

Go to Scanned Documents to process the document.

To guide clients through this process, download screenshots and instructions for doing this in CMS & MyMSD (pdf) [http://doogle/documents/resources/helping-clients/products-services/service-delivery/mymsd/mymsd-document-upload-screenshots-and-step-by-step-instructions-2.0.pdf] .

Important notes and exceptions

Processing Documents

Whoever uses the document, must ensure the document is saved and linked or deleted from CMS. For example, if a CSR requests the document to pay a hardship, they need save and link or delete the document once completed. If the CSR requests the document then schedules a call back, the person calling the client back needs to save and link or delete the document.

Types of documents clients can upload

If a client asks you about what kind of documents they can upload, please let them know:

they can upload a document, an email or something scanned and saved.

they can also take a photo of the information we need, if they want to.

JPEG and PNG files need to be less than 5MB.

Word and Excel files need to be less than500KB.

PDF files need to be less than 5MB.

Uploading PDF files

Clients uploading PDF files need to make sure the file suffix (.pdf) is in lowercase - not capital letters. For example mickey_mouse_bankstatement.pdf

Access to this function

Some clients with limited access to MyMSD won't be able to use this function. For example, low trust clients and clients receiving support after the Christchurch Mosque Attack.

Full process

Step	User	Action
1	Staff	Before you turn on the application process, check with the client if they can see "Current Application" in MyMSD. This is where the client can upload their documents for their benefit or application If the client doesn't have "Current application" you can turn on the upload space in MyMSD by selecting the action menu in the clients CMS record and select "Enable MyMSD Document Upload" Go to the 'action menu' in CMS - three dots on the upper right corner of the main screen.
2	Staff	CMS will ask you to confirm the Number of days for the client to upload evidence. Please ensure that Today is selected and select 'Yes' Note: this upload space will not create a task for additional processing. Please do not leave this upload space open longer than your phone call with the client
3	Client	Let the client know they can upload their documents in MyMSD. The client needs to select "My profile"
4	Client	A space will be available for them to select "Upload your documents"
5	Client	The client will be asked what the document relates to; get the client to select "Benefit application" or "NZ Super application"
6	Client	The client will be then shown an instruction sheet showing; - they can upload a document, scan or an attachment - they can take a photo of their document - that the document they are uploading needs to be clear and readable The client can select "Get started" to enter the upload space in MyMSD
7	Client	The client needs to select the "Type of document" from the drop-down box: They can select: - Photo ID - Non-photo ID - Evidence of costs
8	Client	The client can then select the upload area (in grey) where they can upload their documents or drag and drop
9	Client	Once the document is uploaded this will be shown in the Files uploaded section under the select "Type of document"
10	Client	If the client has more documents to upload, they can repeat steps 7 and 8; otherwise they can select Next
11	Client	The client will then be asked to complete a declaration where they tick a check-box for the following: - I declare that the photos or files I'm uploading are correct copies of the original documents - I understand that giving false or incorrect information is a serious offence - I understand that providing offensive material may result in prosecution action
12	Client	Once all three declarations are selected; the client can select "Next"
13	Client	The client will receive confirmation that the documents have been submitted
14	Staff	Once the client has finished uploading their documents; turn off the document space by going to the "Actions menu" and selecting "Disable MyMSD Document Upload" and confirming you want to disable the upload by selecting "Yes"
15	Staff	You can view the uploaded documents in CMS - Scanned Docs – View Scanned

16	Staff	Once actioned, save and link or delete the document.

MyMSD - Design

Current Applications | Next Steps | Provide Government Issued ID

24 June 2021

Description

When a client applies for a benefit, they need to provide proof of who they are. To get to this point, a client has completed the online application form through an app called EOS (which looks like MyMSD for the client). The next steps are for the client to provide proof of their circumstances and who they are.

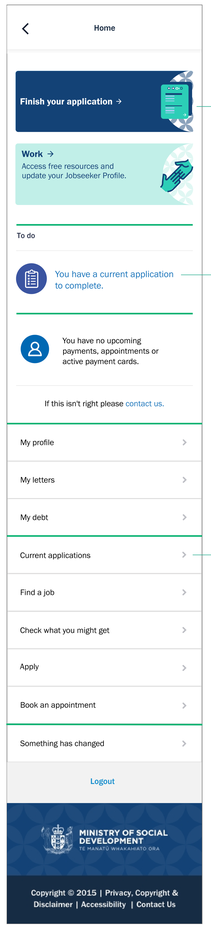
Due to technical limitations the client is not automatically taken to the 'Next Steps' section of their application, and instead is given instructions on where within MyMSD to locate it.

Due to the ongoing changes to the business processing standards, we are regularly reviewing the instructions. Please be aware that some of the examples below may be slightly out-of-date.

Step 1.

MyMSD homepage

This home page is just an example and may look different for each client depending on their circumstances.

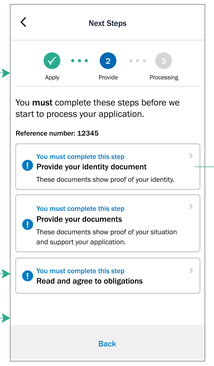


Step 2.

Next Steps

For working age applications, all three of the 'Next Steps' will need to be completed in order for a S2P task to be automatically created.

NZS applications function differently and these steps don't need to be completed in order for the application to be sent to Work Load Manager (WLM). However, the processor will be able to see in CMS what documentation is required and whether it has been submitted (see Appendix B).

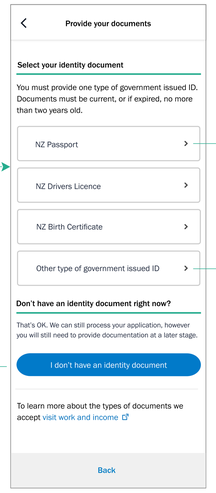


Step 3.

Provide documents

We'll ask clients for their ID if they are a new client or if the ID on their client record is no longer valid.

This page presents the three most common government issued IDs supplied by clients.

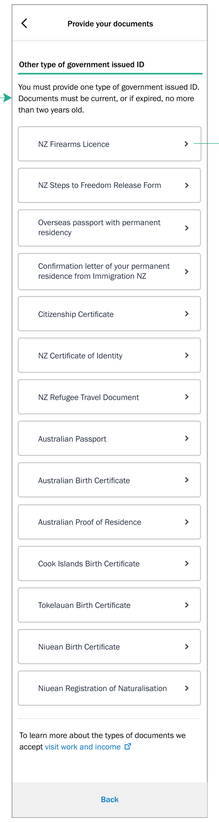


Note: The link at the bottom of these pages takes clients to: https://www.workandincome.govt.nz/about-work-and-income/our-services/what-to-bring/types-of-documents-we-accept.html#null

Step 3a.

Provide documents sub-page

This secondary page continues the list of ID types we accept, in order of the most common country/region of birth. This is to minimise the number of clicks and scrolling for the majority of clients.

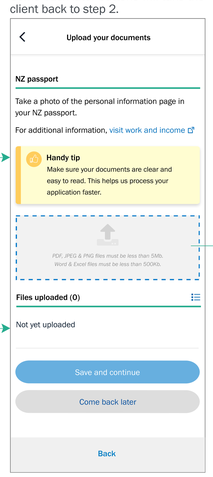


Step 4.

Upload documents

Clients select the grey box to access their own files and choose which file they want to upload. If a client is using a desktop computer, they can also drag and drop files into the grey box.

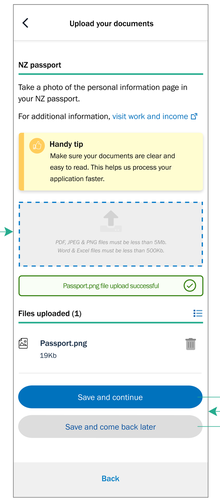
Come back later buttons will take the client back to step 2.



Step 5.

Upload successful

If the wrong document has been uploaded, the client will need to delete it on this page before logging out. Clients are unable to delete documents that were uploaded in the previous visit.

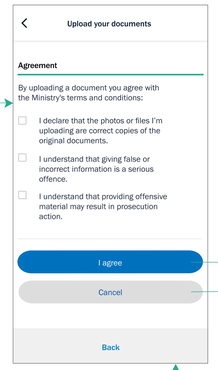


Step 6.

Agreement

All three boxes need to be selected in order for the client to progress.

When a client clicks agree, the documents will be sent to Scanned Documents (see Appendix A).

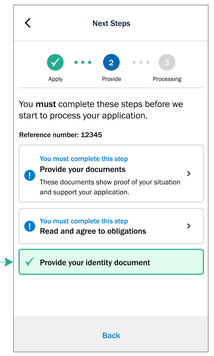


Step 7.

Identity step complete

Once they've agreed, the identity section will be marked as complete and will move to the bottom of the list of next steps.

The client cannot re-enter this step, and will not know when their documents are processed by a staff member.

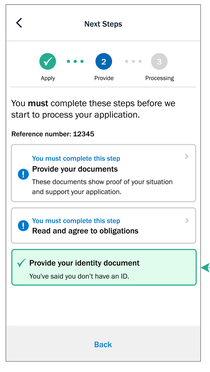


Step 7a.

Identity step complete - can't do

The step is marked as complete and a client will be unable to re-enter the identity step flow.

The staff member processing the application will need to get in touch with the client to discuss their options for providing an ID document, depending on the business processing standards at the time.



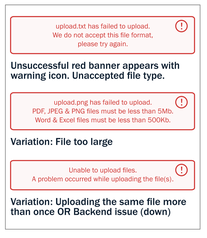
Step 5a.

Upload errors

A client may experience errors uploading documents. A red alert will appear confirming the reason for the unsuccessful upload.

The client will need to select the trashcan to delete this before trying again.

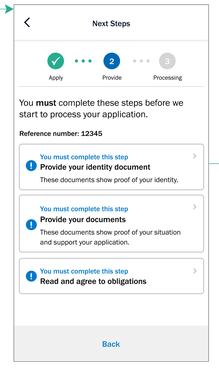
For PDF documents, the file extension needs to be lowercase, e.g. myid.pdf not myid.PDF



Step 2.

Next Steps

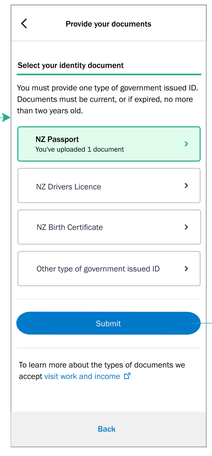
If a client has more to upload later on, they can save their progress and return later.



Step 3b.

Provide documents (with upload)

They'll need to come back to their identity step to complete it by selecting 'Submit'.



MyMSD - Design

Current Applications | Next Steps | Provide Supporting Documents

24 June 2021

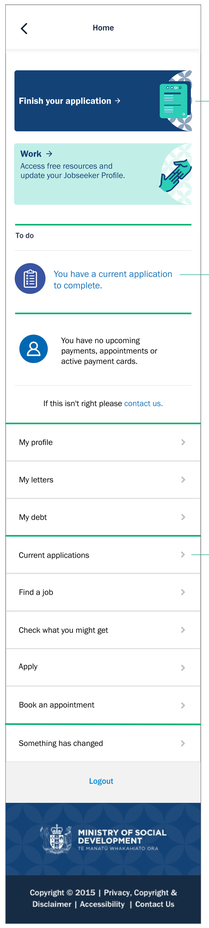
Description

When a client applies for a benefit, they need to provide information about their situation. The next steps is for the client to provide supporting documents.

The documents we ask for in this flow depend on the answers a client has given in their online application form.

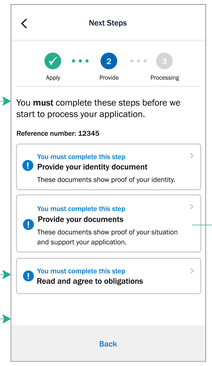
The 'Provide your documents' flow operates the same as the identity flow with a couple of extra functions.

Step 1.
Example homepage

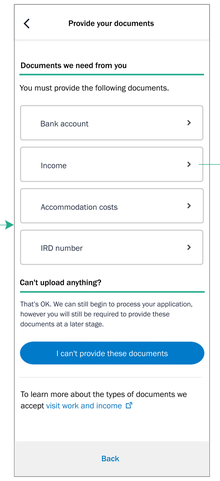


Note: This home page is just an example and may look different for each client depending on their circumstances.

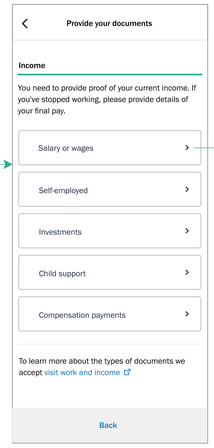
Step 2.
Next Steps



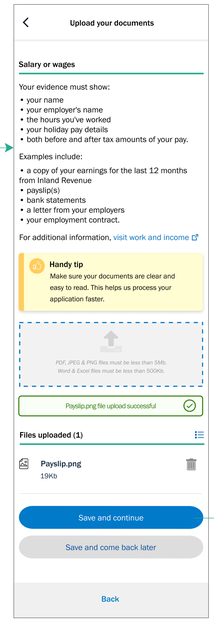
Step 3.
Provide documents



Step 4.
Provide documents sub-page

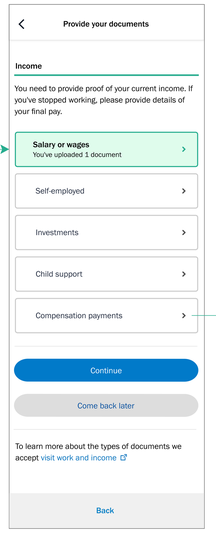


Step 5.
Upload documents

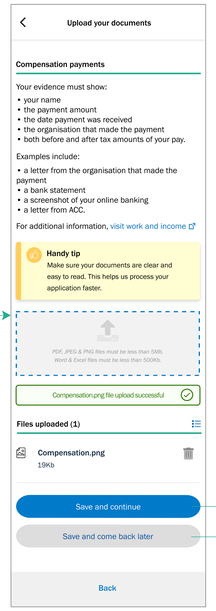


Step 6.
Provide documents sub-page

If they need to, clients can upload more than one type of document.

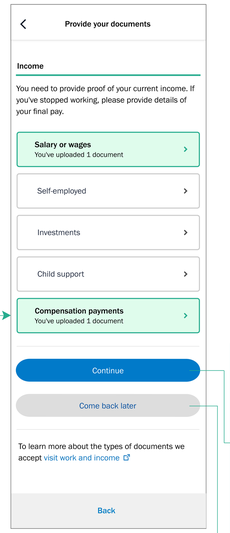


Step 7.
Upload documents



Step 8.
Provide documents sub-page

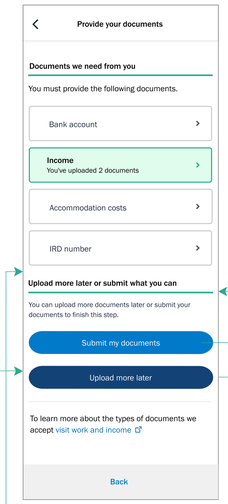
Clients will see the total number of documents they've uploaded under each section.



Step 9.
Provide documents

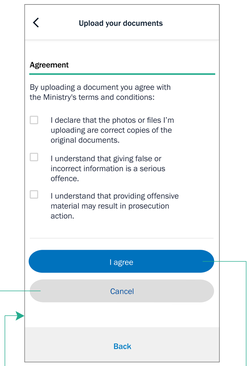
If the submit button is selected without all documents being uploaded, this will be recorded as a 'Partial upload' in the CMS application summary.

This allows clients who may be struggling to provide all their documents to continue with their application and get help from staff.



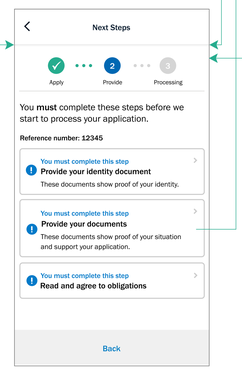
Step 10.
Agreement

Once a client has selected 'Submit my documents' and agreed, they will no longer be able to return to this flow to upload more documents.

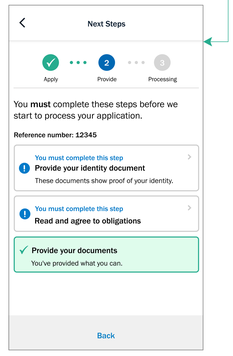


Note: When a client clicks agree, the identity document is sent to Scanned Documents in CMS. If a client clicks cancel, they can come back later.

Step 2.
Next Steps



Step 11.
Next Steps



MyMSD

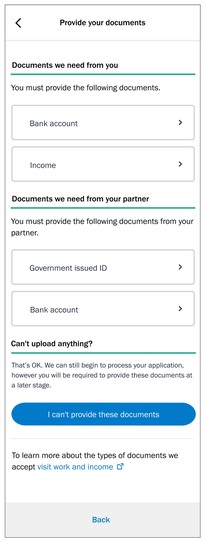
Current Applications | Next Steps | Partner

Description

When a client is required to provide supporting documents for their partner, these will be listed in the 'Provide your documents' flow.

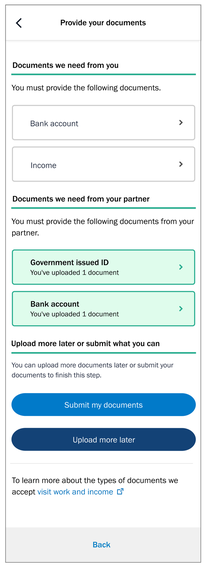
Partner

Before upload.



Partner

After upload.



MyMSD

Current Applications | Next Steps | Supporting Documents for Primary and Partner

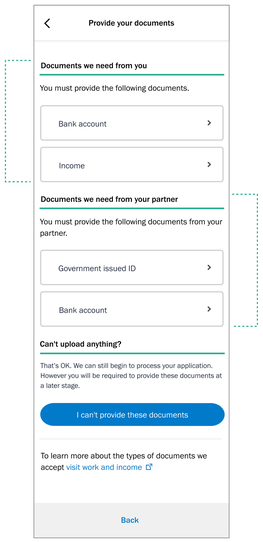
24 June 2021

Description

These are the types of documents which may be required for a primary client and their partner. These can differ depending on the client's circumstances. When a client completes their application form, the list of documents we need from them is automatically generated and displayed in MyMSD. CMS checks if verification of ID, bank account, and IR number already exist. MyMSD won't ask for these if these is already available and valid. Everything else is determined by what the client submitted in the EOS application.

Primary or Partner

Here's a full list of the type of documents we may ask a client and their partner for:



- Government issued ID (partner only)
- Bank account
- IRD number
- Income
- Accommodation costs
- Child ID
- Proof of name change
- Proof of ongoing costs
- Medical certificate for the person you're caring for
- Child Disability Allowance application form
- Disability certificate
- Childcare Subsidy verification form
- Out of School Care and Recreational Subsidy form
- Guaranteed Childcare Assistance Payment application
- Proof of cash and non-cash assets
- Overseas pension details
- Partner Death Confirmation (primary applicant only)

Income →

- Salary or wages
- Self-employed
- Investments
- Child support
- Compensation payments

Accommodation costs →

- Home ownership costs
- Rental costs
- Board

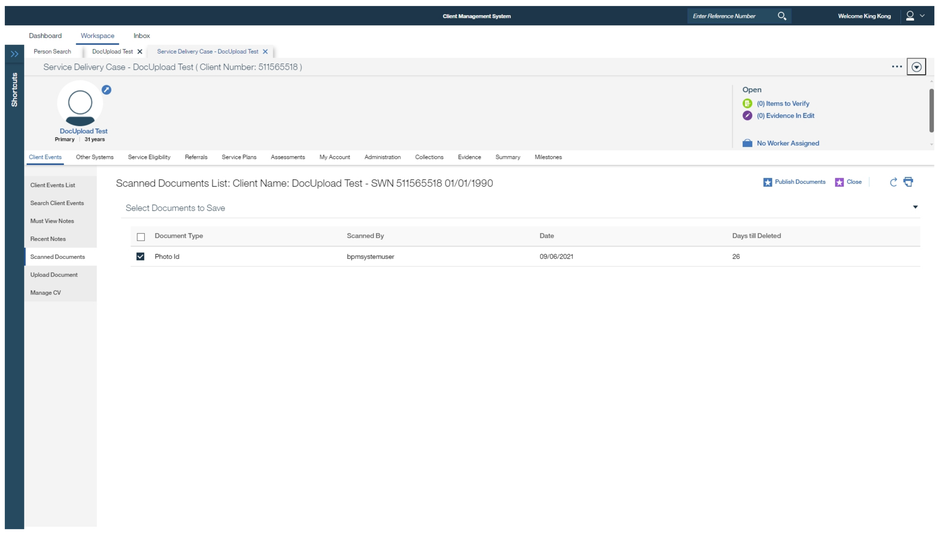
Note: Only Income and Accommodation costs have sub-pages prior to upload.

Appendix A

Related views in CMS

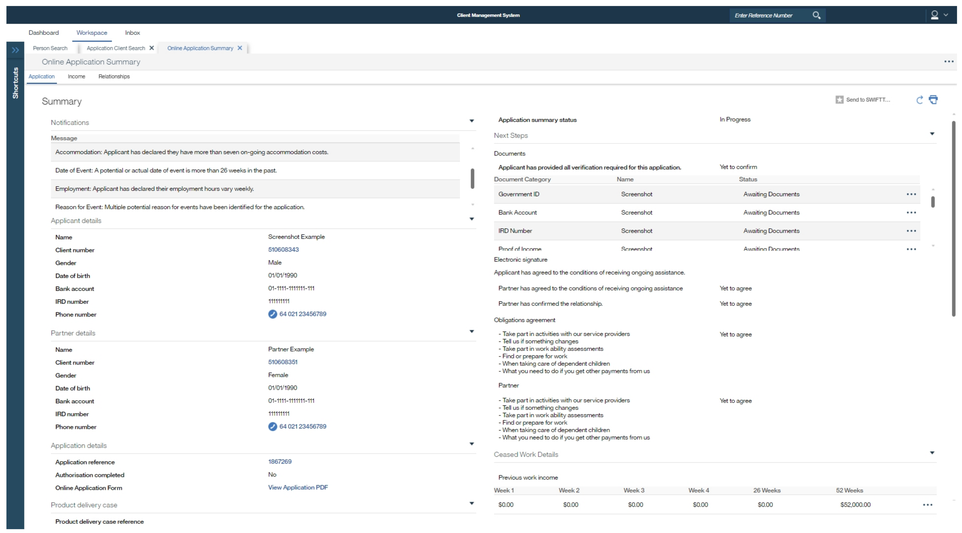
Scanned documents

Documents appear in here when a client selects 'I agree' on the agreement screen (page 1: step 6; page 2: step 10). Documents from MyMSD will show as scanned by bpmsystemuser.



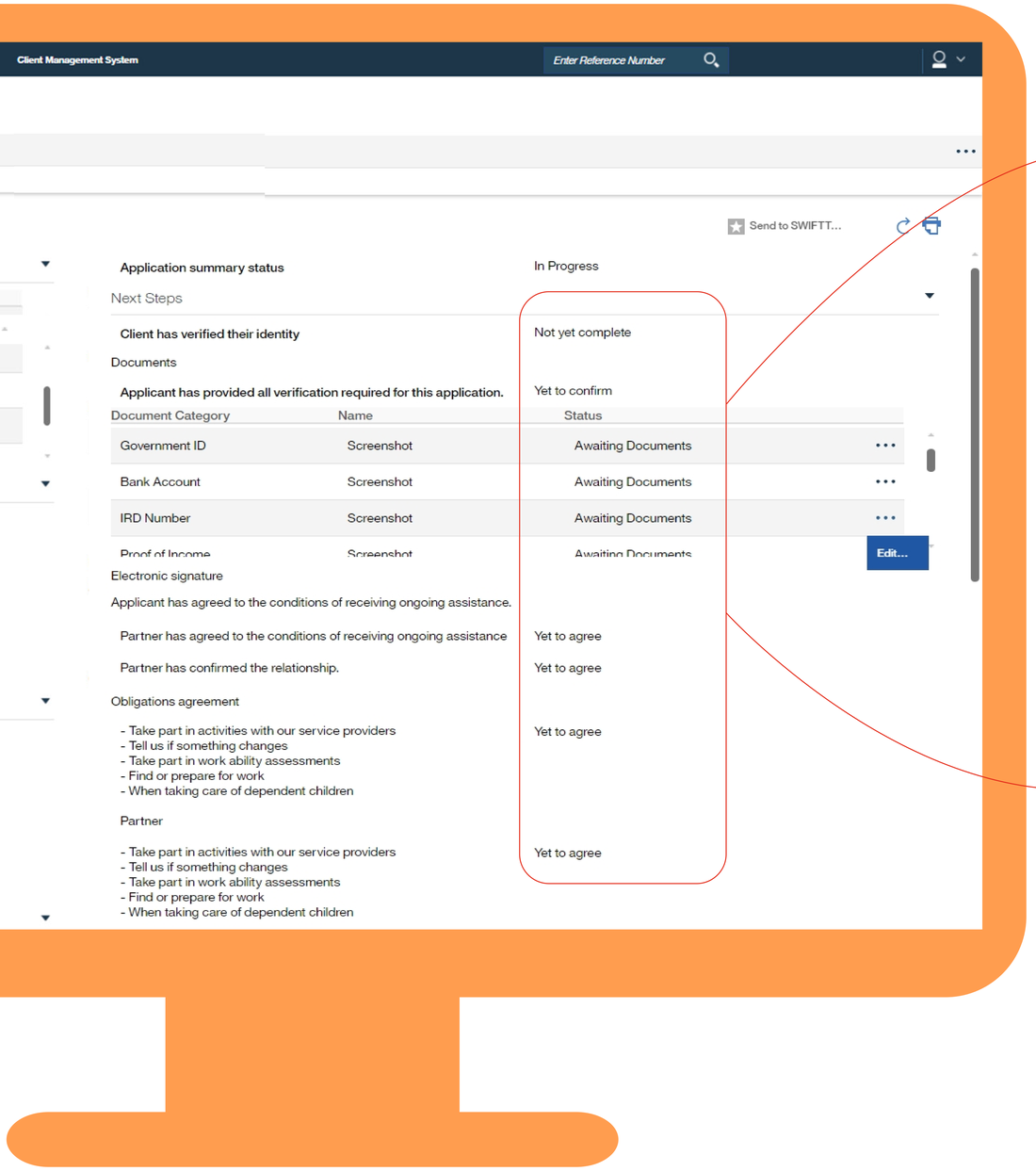
Application summary

As a client completes their next steps (page 1: step 7, 7a; page 2: step 11). the column to the right is updated. See Appendix B for more detail. Note that the seniors application summary looks slightly different to the working age applications summary pictured below.



Changes made in either system are reflected for both staff and clients.

If the client does one of their Next Steps, MyMSD will reflect that in CMS.
If the status of a Next Step is changed in CMS, it is reflected in MyMSD.



Example Statuses in CMS:

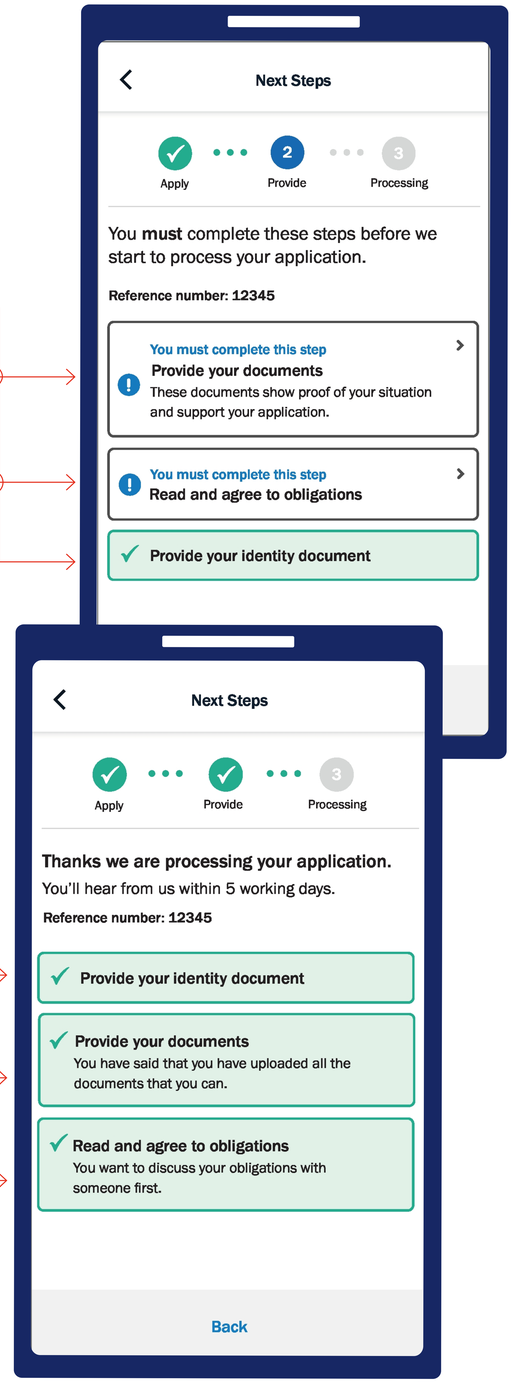
Partially Completed:
(no partner)

Client has verified their identity	**Complete**
Applicant has provided all verification required for this application	**Yet to confirm**
Obligations agreement	**Yet to agree**

Fully Completed:
(no partner), client has done all they can)

Client has verified their identity	**Complete**
Applicant has provided all verification required for this application	**Partially uploaded**
Obligations agreement	**Contact requested**

What MyMSD shows the client:



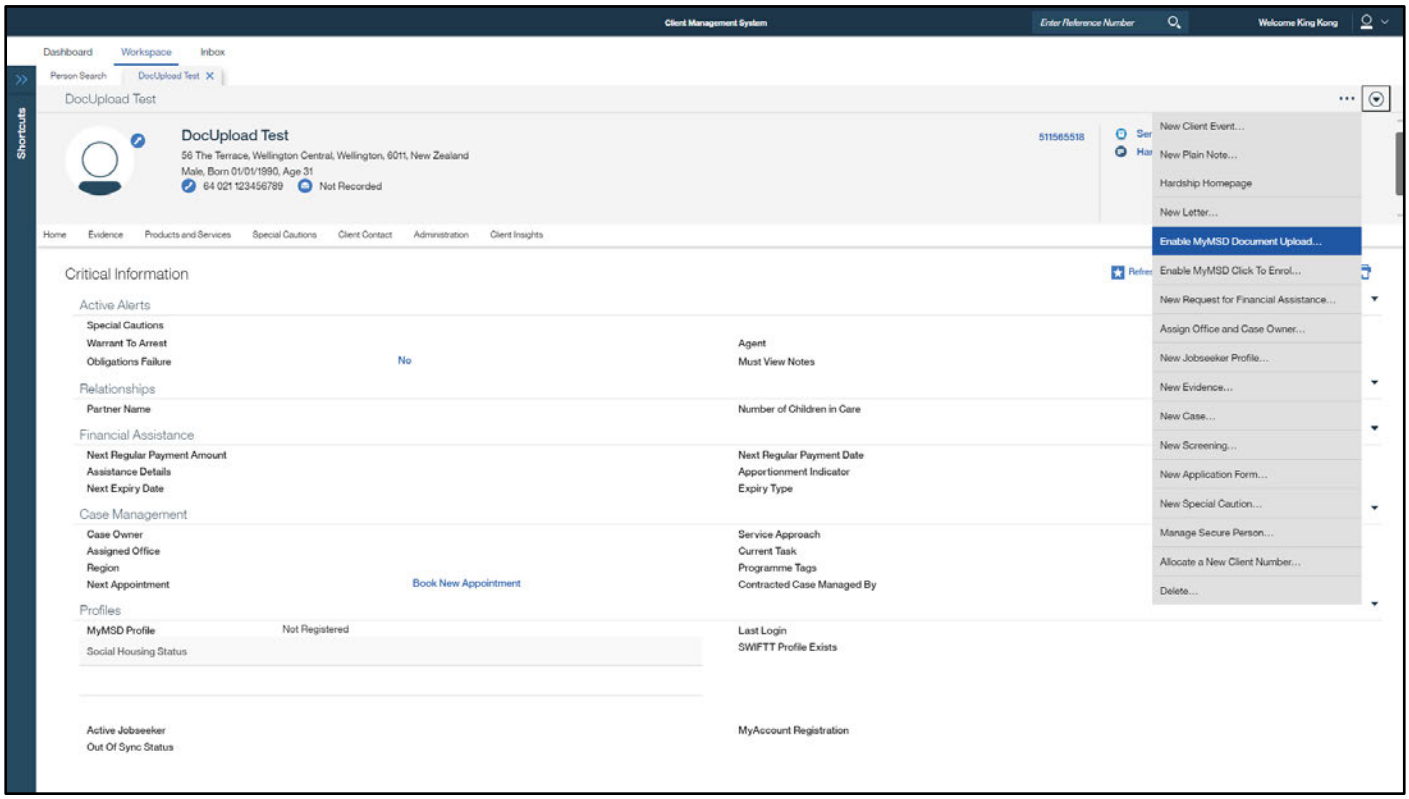
MyMSD Document Upload – Enabling in CMS

If clients need to provide further documentation as part of an application, you can enable this in CMS.

Please note: Some clients with limited access to MyMSD won't be able to use this function. For example, low trust clients and clients receiving support after the Christchurch Mosque Attack.

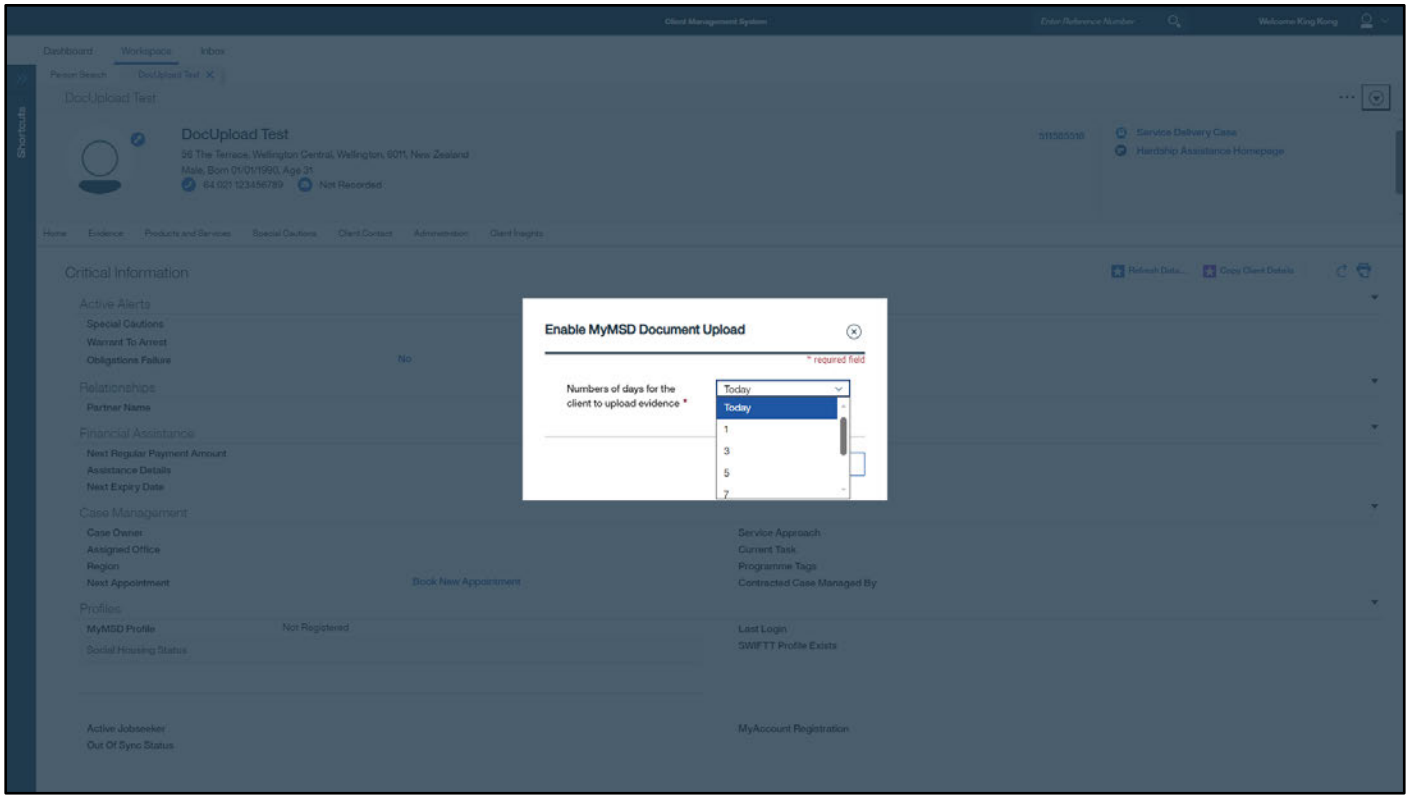
1. Select 'Enable MyMSD Document Upload'

Found in the action menu on a client's home screen.



2. Choose number of days to functionality to be enabled

All times expire at midnight, options are today, 1 (tomorrow), 3, 5, 7, 14 and 28 days.

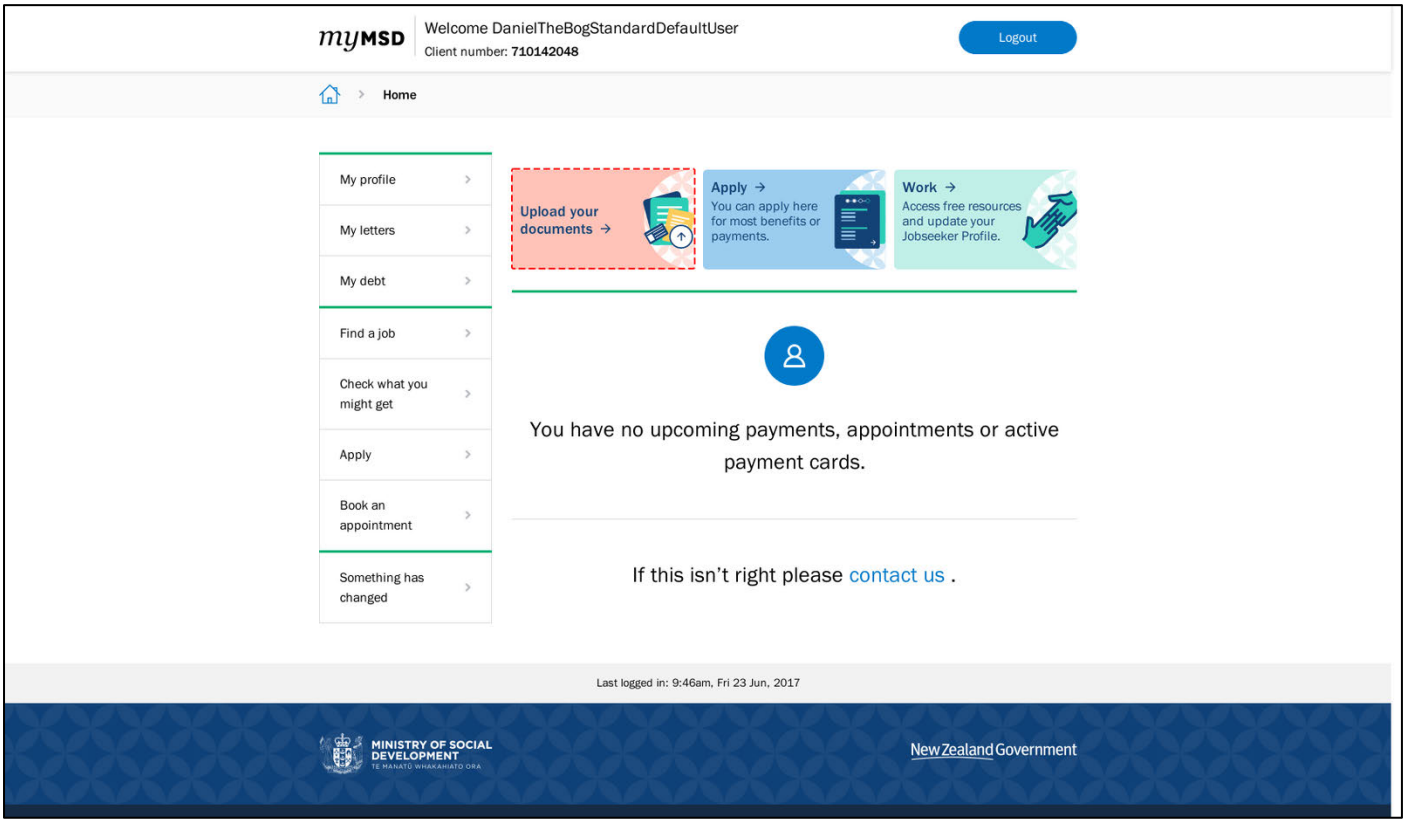


MyMSD Document Upload – Client view

Once enabled in CMS, this is how a client can upload documents in MyMSD. The following functionality will be enabled for the period you specify in CMS. There are two ways to access the document upload flow.

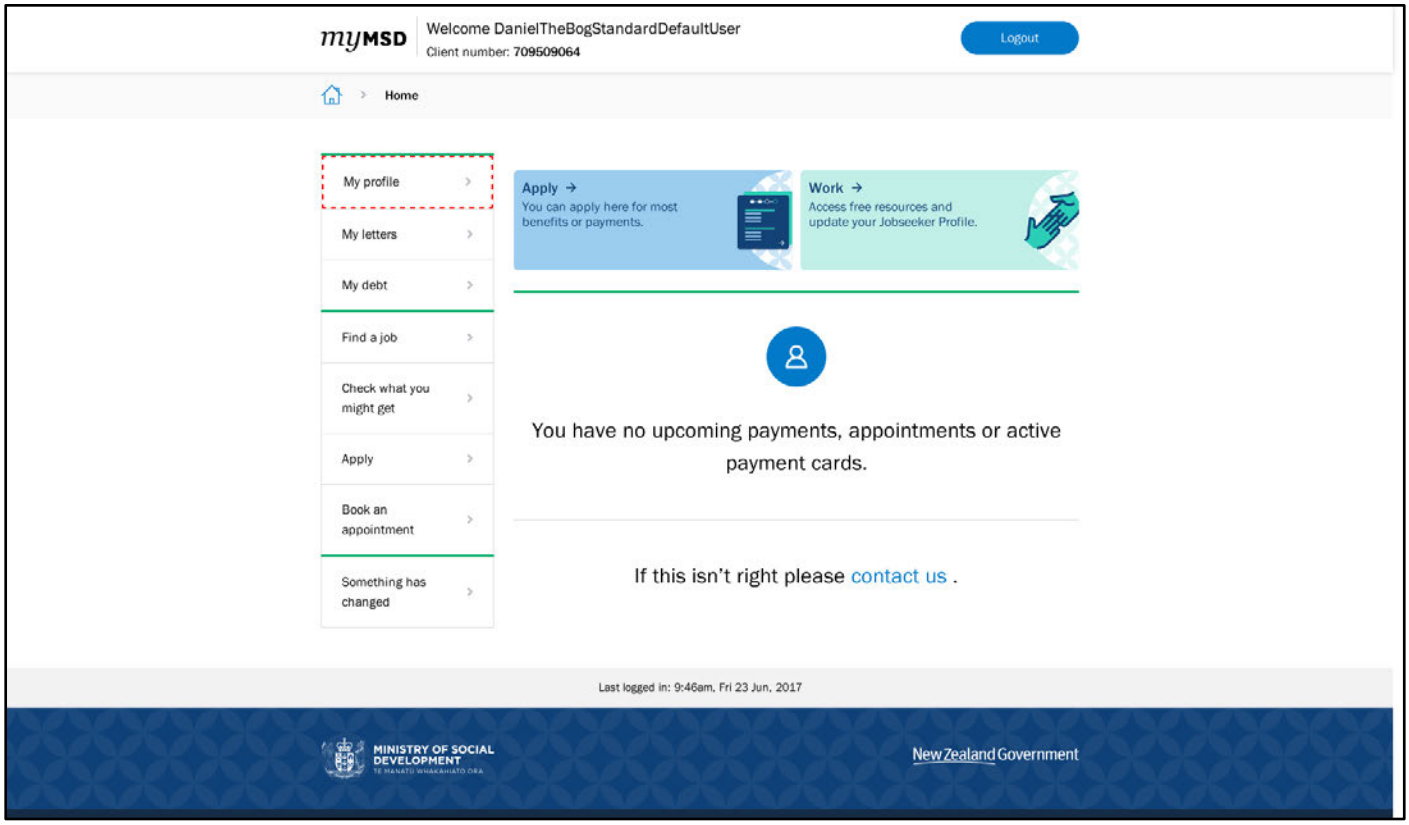
1a. If a client *is not logged into MyMSD* when you enable document upload: Select the 'Upload your documents' tile

Note: Selecting 'My profile' will work too, as per step 1b and step 2.

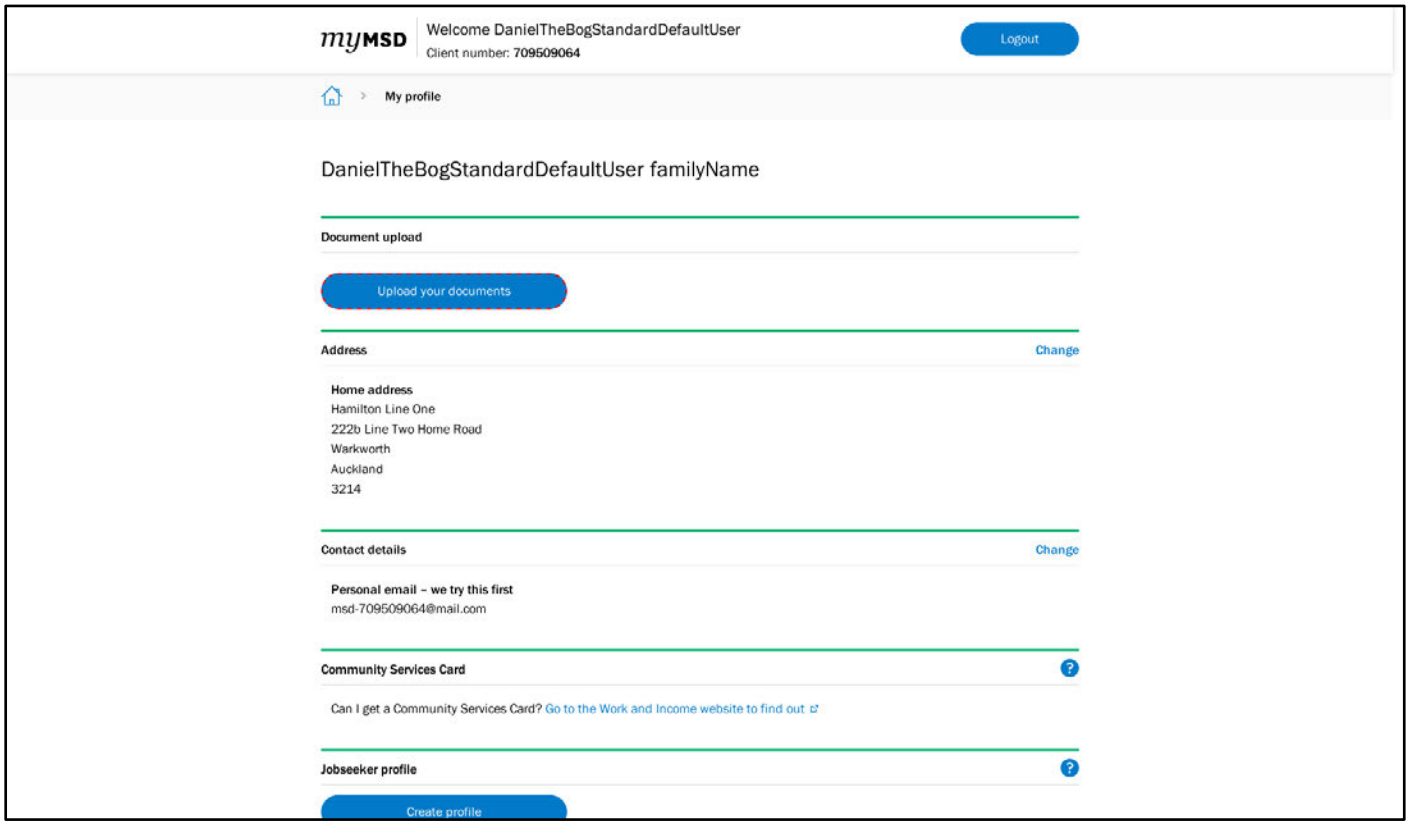


This will take a client straight to step 3.

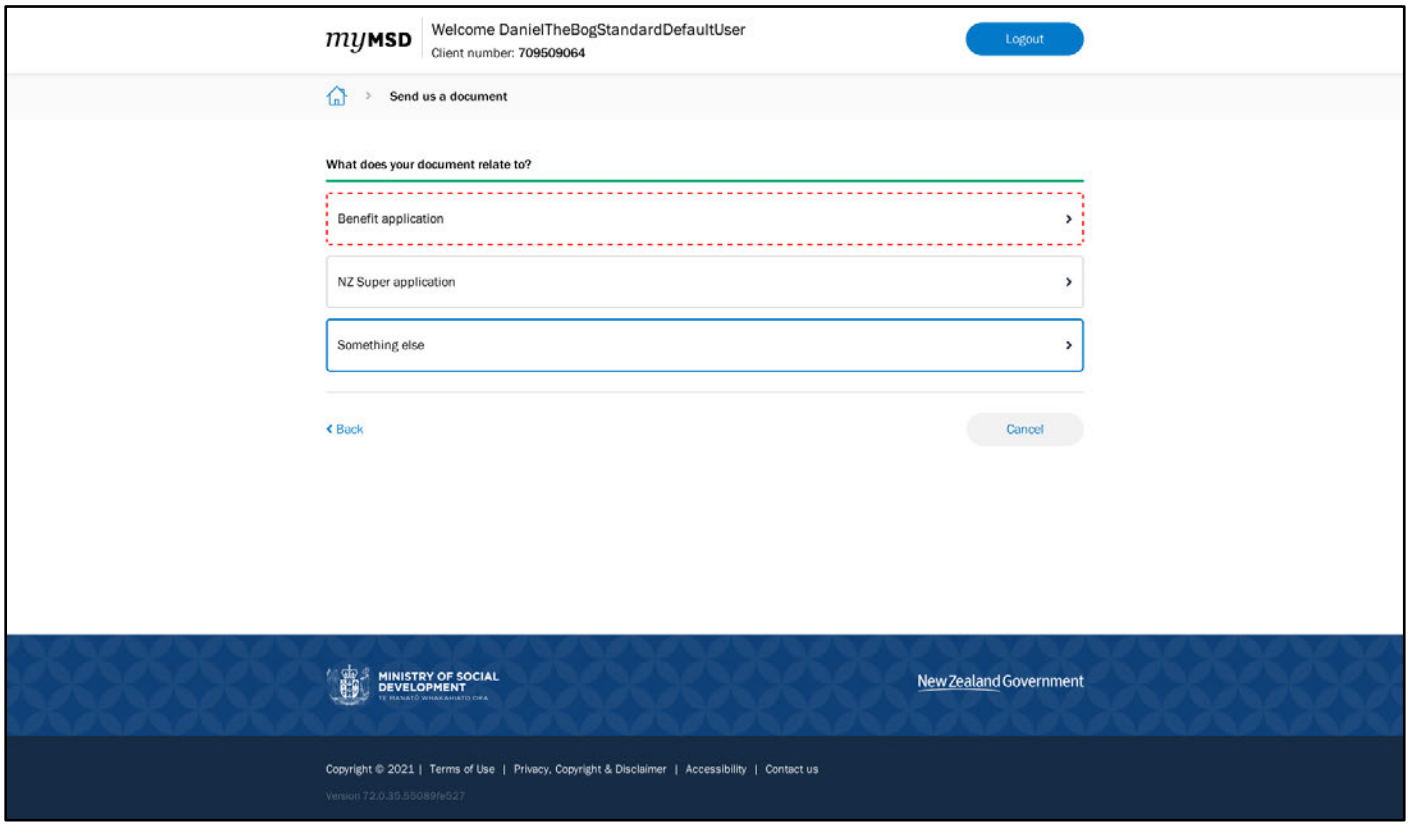
1b. If a client *is already logged into MyMSD* when you enable document upload: Select 'My profile' in the main menu



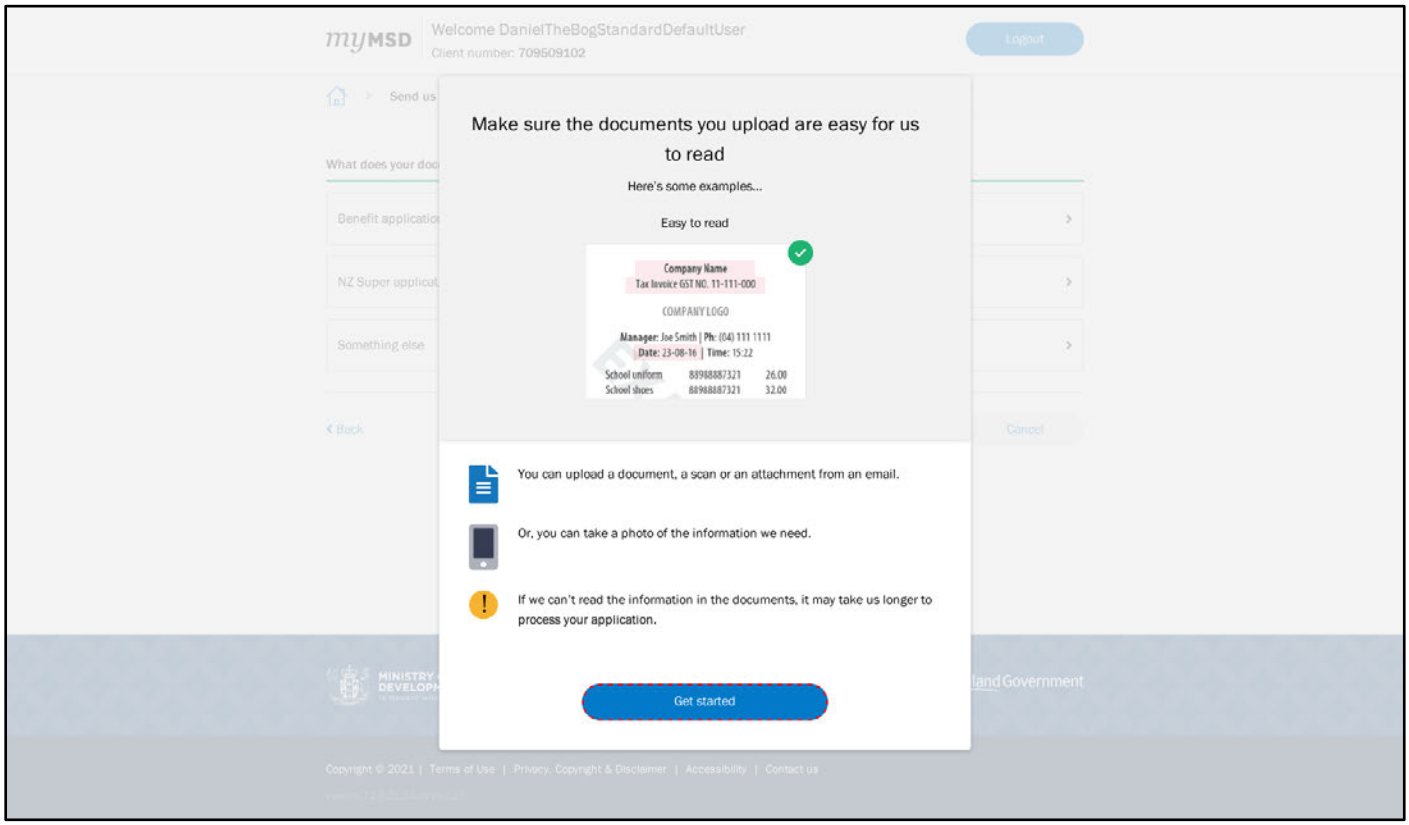
2. Select 'Upload your documents'



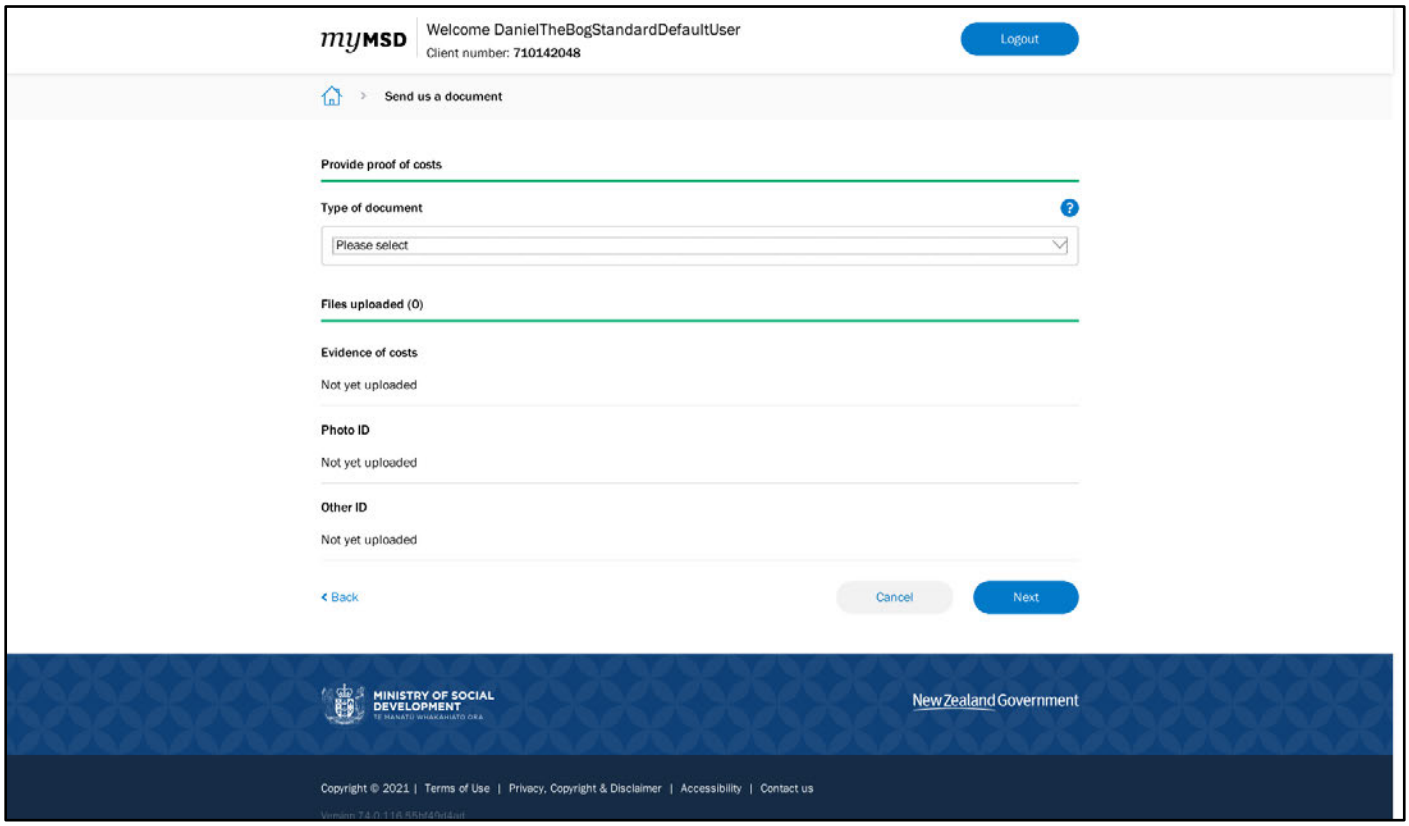
3. Choose document type



4. Select 'Get started'

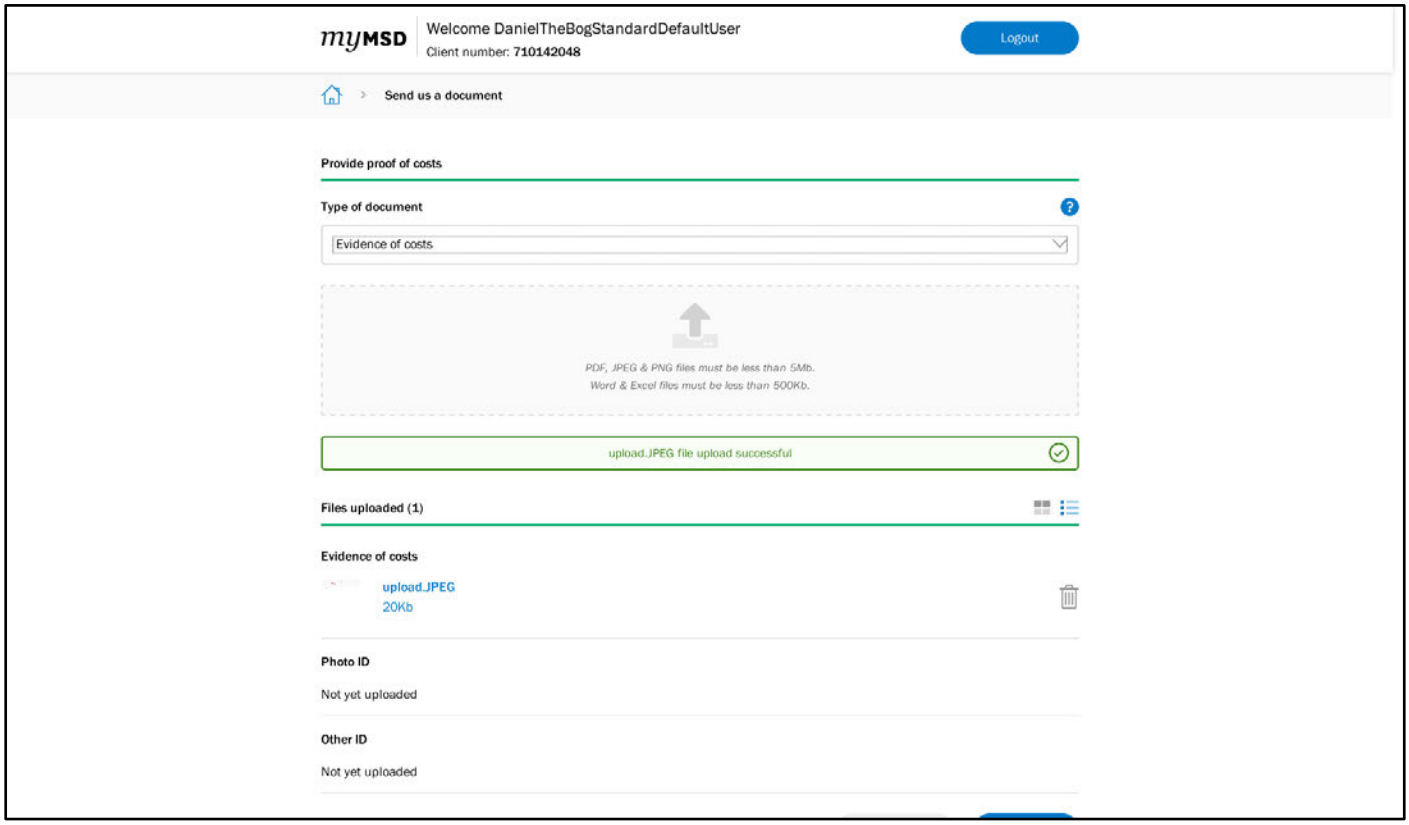


5. Select type of document using drop down menu



6. To upload, click the grey box OR drag and drop files in

Clients can upload Word, Excel, PDF, PNG, and JPEG files.



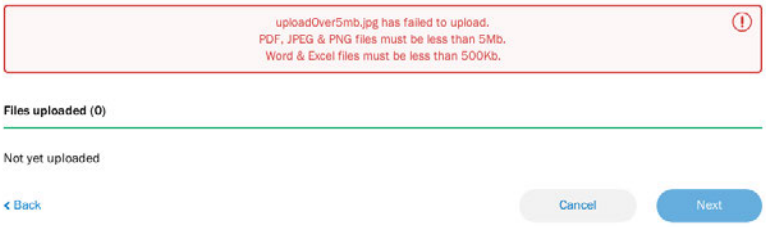
6a. Upload problems & restrictions

Clients can encounter different errors while trying to upload documents.

File too big

The client may need to re-save or split documents to reduce the size.

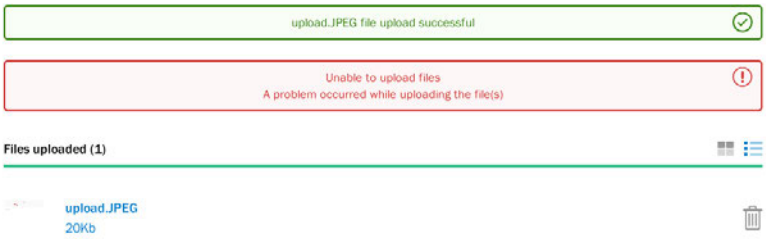
- JPEG and PNG files need to be less than 5MB.
- Word and Excel files need to be less than500KB.
- PDF files need to be less than 5MB.



Duplicate documents

If a client attempts to upload the same file, an error message will display.

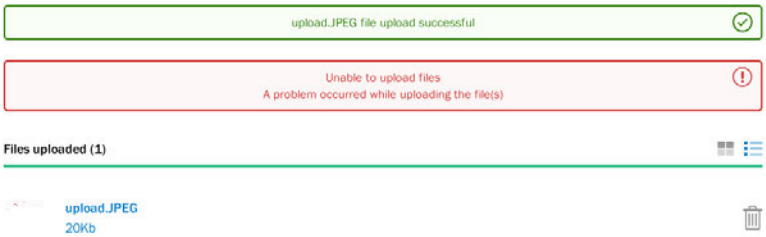
Clients may need to delete the document.



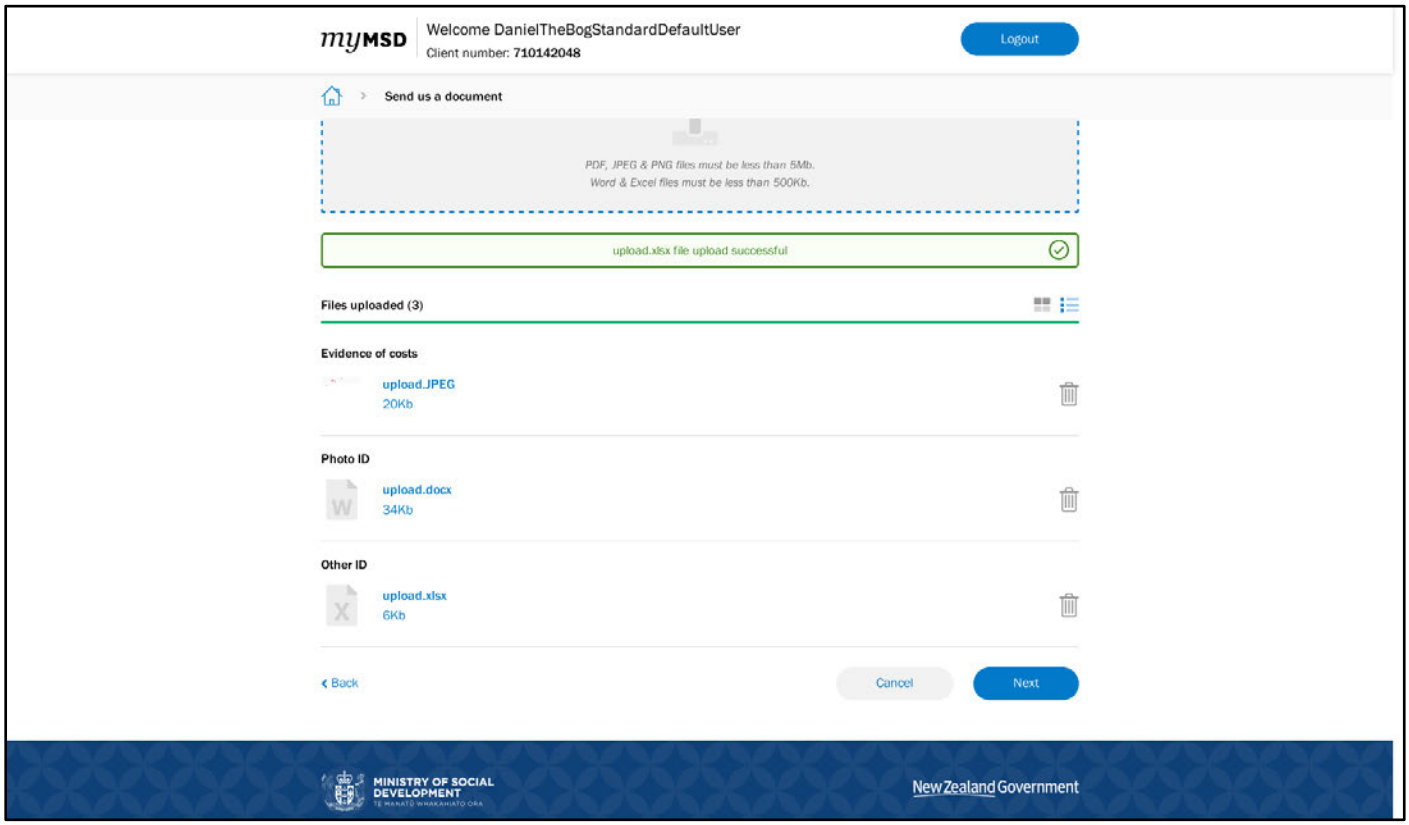
PDF file extension capitalisation

If a client has tried to upload a PDF which is under 5MB and it still doesn't work, tell them to make sure the file suffix (.pdf) is in lowercase - not capital letters (.PDF).

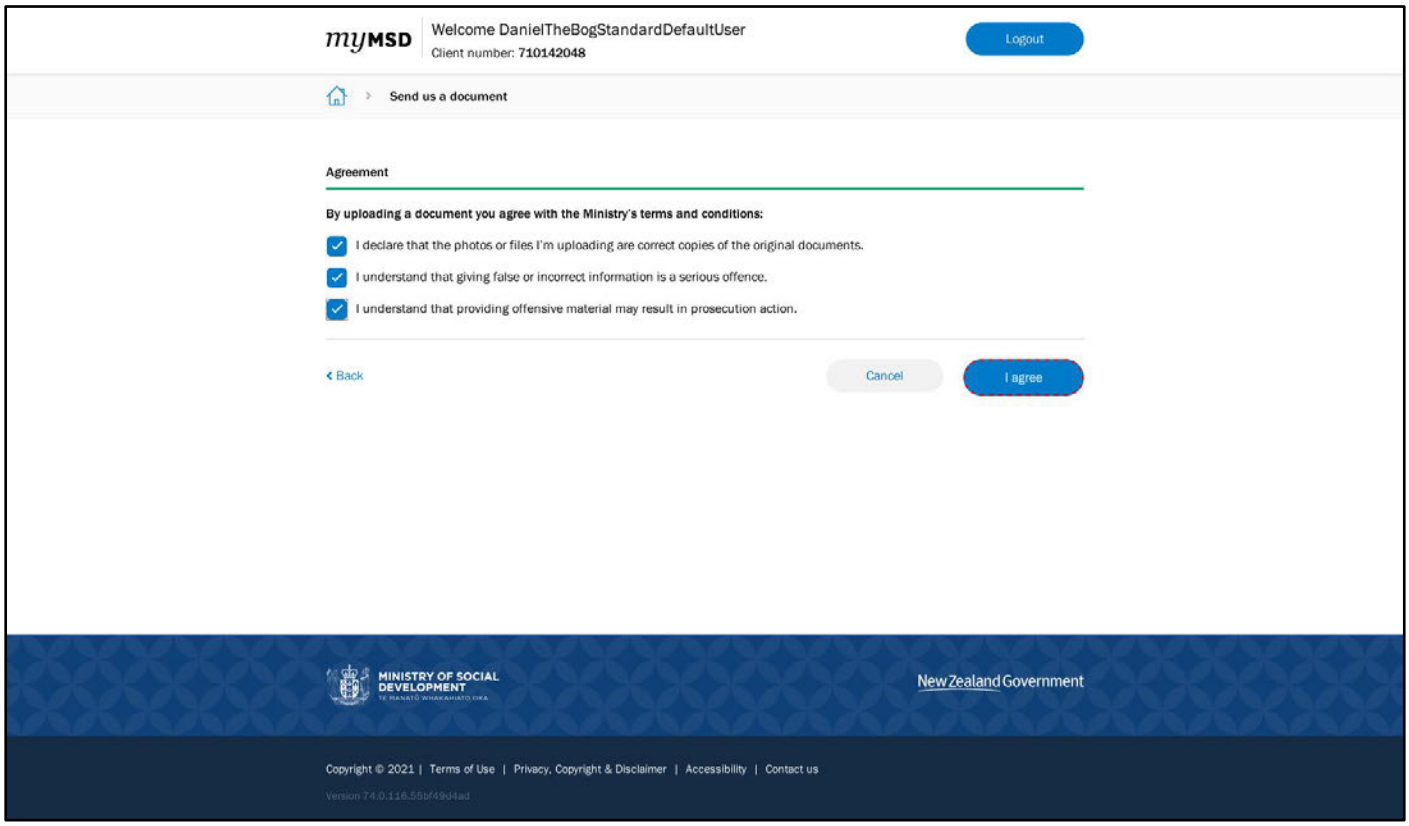
For example bankstatement.pdf



7. Select 'Next' once document uploads completed

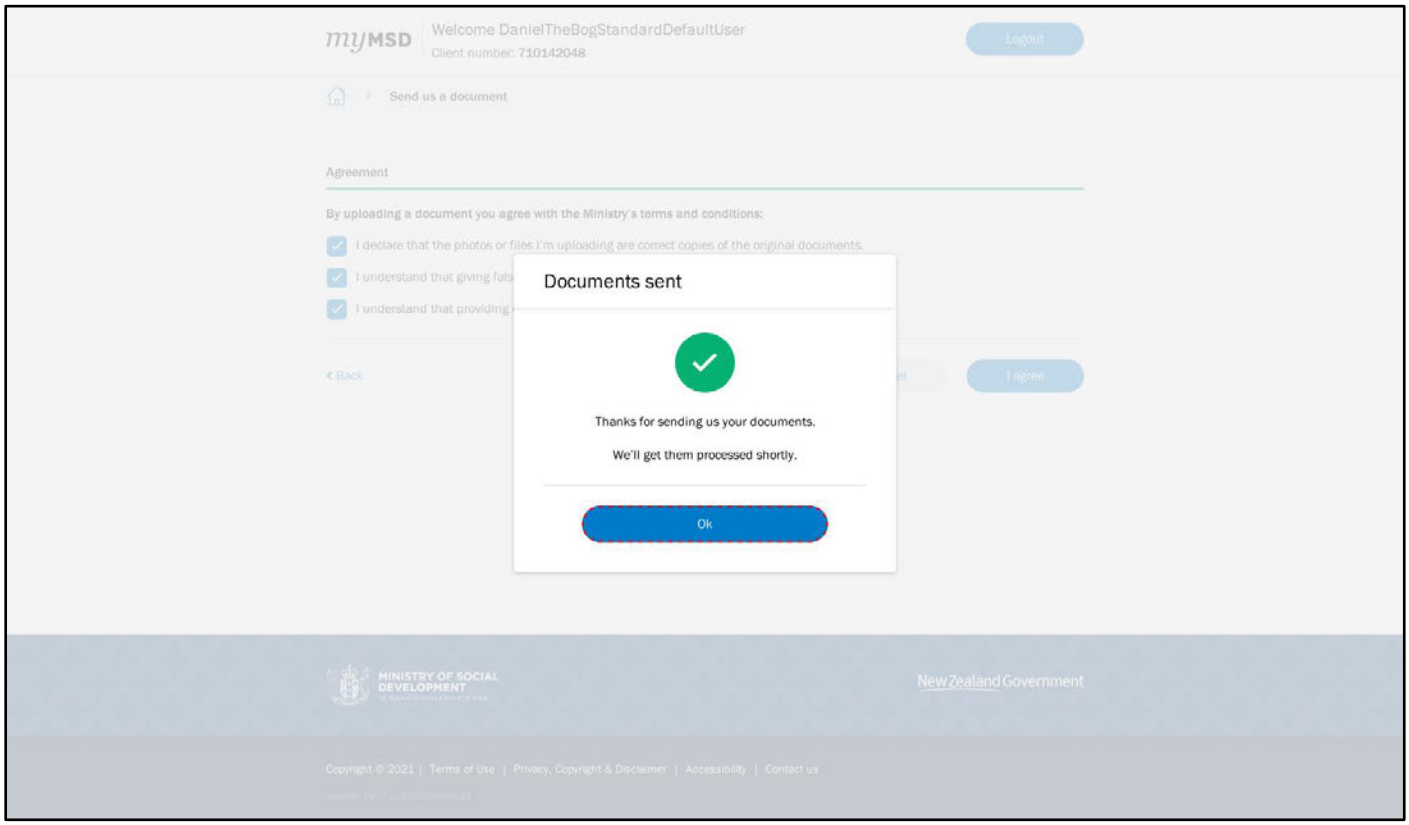


8. Tick boxes then select ‘I agree’



9. Confirmation message appears, select ‘Ok’

Clients will then return to the MyMSD homepage, and can return and upload more documents as long as it is enabled. Documents a client has uploaded will appear in Scanned Documents at this point.

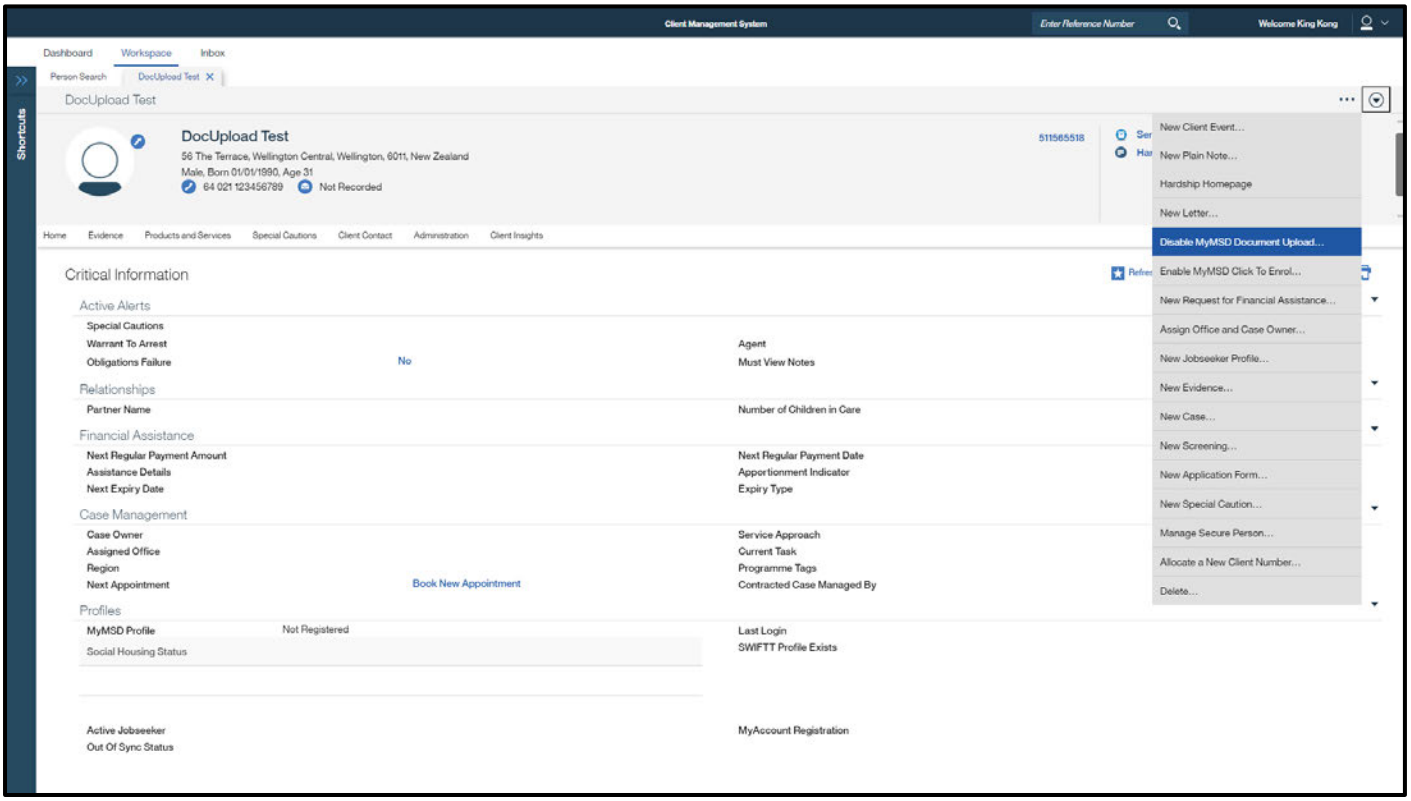


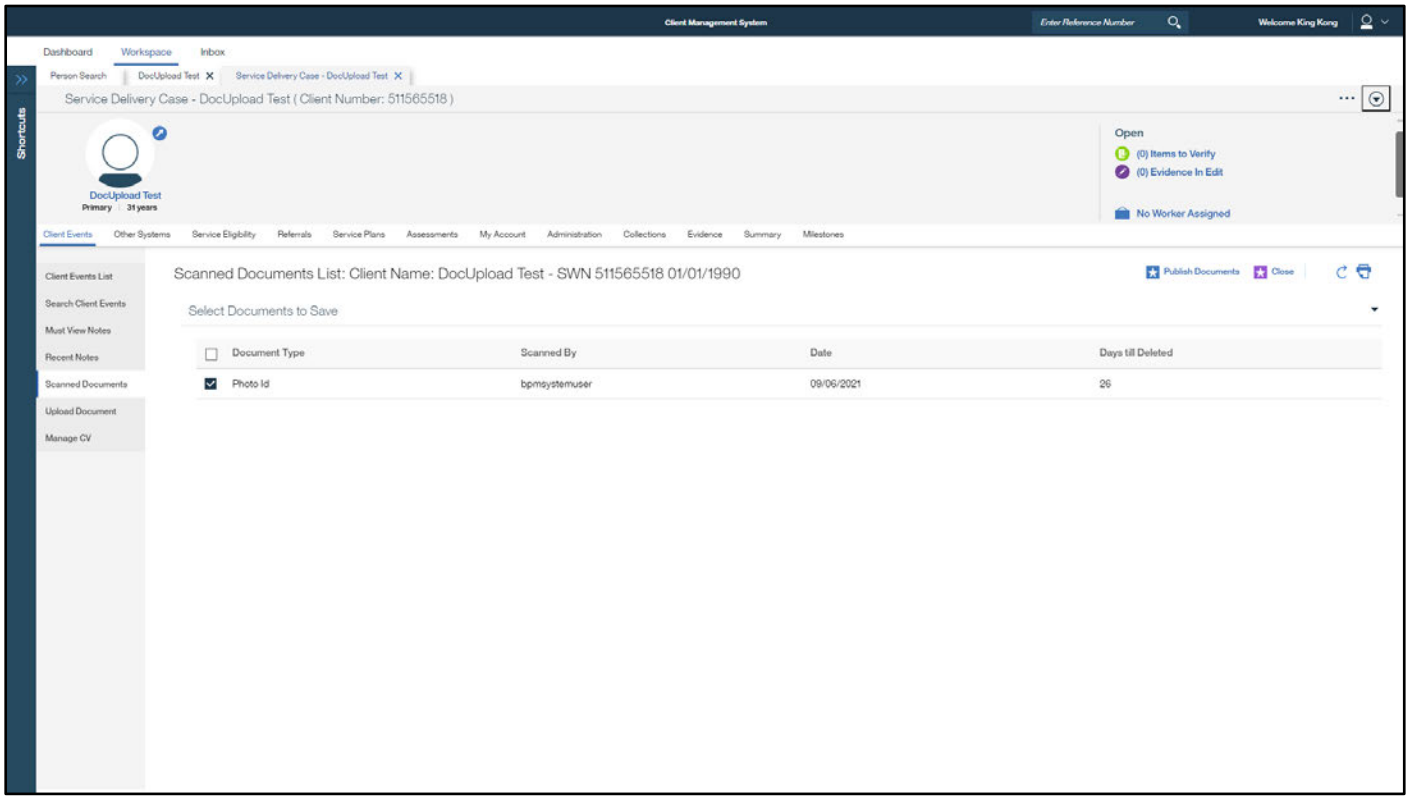
MyMSD Document Upload – Disabling in CMS & Viewing documents

Once a client has completed uploading their documents, you can disable the functionality.

1. Select 'Disable MyMSD Document Upload'

If the client has uploaded everything that you need.



2. Go to 'View scanned documents' to view & process the uploaded documents

MyMSD uploaded documents are always scanned by bpmsystemuser