Headquarters
New Zealand Defence Force
Defence House
Private Bag 39997
Wellington Mail Centre
Lower Hutt 5045
New Zealand

OIA-2026-6035

16th November 2026

[redacted]

Dear [redacted]

I refer to your request of 18 October 2026, under the Official Information Act 1982 (OIA), *concerning the delegation of decision-making powers for Veteran's Pension under the Veterans' Support Act 2014.*

Specifically, you requested the following:

1. *Current delegations: The written delegation instrument or instruments made under section 160 of the Veterans' Support Act 2014, transferring functions, duties or powers to the chief executive responsible for administering the Social Security Act. Please include relevant schedules, signatures, restrictions, conditions and effective dates.*
2. *Historical delegations: Any amendments, replacements or revocations of these instruments since 7 December 2014, including any existing register identifying the periods during which each delegation applied.*

Please find enclosed copies of two delegation documents, dated 1 December 2014 and 6 November 2020 respectively, which delegate Veterans' Pension functions to the Chief Executive of the Ministry of Social Development. No register or other such record as you have described has been identified.

3. *The MSD–NZDF agreement: The memorandum of understanding dated 2 December 2014, together with any subsequent amendments or current replacement documents, insofar as they concern Veteran's Pension decision-making responsibilities and delegated powers.*

A copy of the Memorandum of Understanding between the Ministry of Social Development and the New Zealand Defence Force / Veterans' Affairs, dating from December 2014, is enclosed. Note that some functions of the 2014 agreement have been replaced by the Veterans' Affairs Information Sharing Agreement between Veterans' Affairs and the Ministry of Social Development. More information about this is provided on the Veterans' Affairs website[1].

4. *Reserved decision-making powers: Any existing instruments or schedules identifying which Veteran's Pension decisions remain with Veterans' Affairs, including qualifying operational service, medical decisions, pension rates, reviews and appeals. Please distinguish any relevant delegations under sections 202 or 203 from those under section 160.*

[1] https://www.veteransaffairs.mil.nz/about-veterans-affairs/our-programmes/aisa/ and https://www.veteransaffairs.mil.nz/about-veterans-affairs/our-programmes/msd-aisa/

There is no separate instrument as described. Rather, the Veterans' Support Act preserves and provides for the Veterans' Service Review Panel's responsibility to review decisions relating to qualifying operational service through the review panel process, while the Ministry of Social Development exercises the delegated *Veteran's Pension* decision-making functions under section 160.

This section expressly enables the General Manager to delegate functions, duties and powers under Part 6 to the chief executive responsible for administering the Social Security Act. The administrative functions relating to the *Veteran's Pension* and the *Veteran's Pension Lump Sum on Death* are undertaken by the Ministry of Social Development under the delegation as below:

- Veterans' Affairs does not make decisions on claims for the *Veteran's Pension* or the *Veteran's Pension Lump Sum on Death*. Under the section 160 delegation, the Ministry of Social Development administers and determines those claims.
- Veterans' Affairs' role is limited to providing the Ministry with information about whether an individual has *qualifying operational service*[2].
- Veterans' Affairs remains responsible, however, for annual CPI adjustments to *Veteran's Pension* rates under section 170 and the *Veteran's Pension Lump Sum on Death* amount under section 31 of the Veterans' Support Act 2014.

In simple terms, most *Veteran's Pension* decisions can be challenged through ordinary Social Security appeal processes, with the exception of decisions to decline because the applicant's service is not qualifying operational service. In these cases, the applicant may seek a review under Part 7 of the Veterans' Support Act; sections 175(2)-(3) and 215(1)(b) in particular provide for this.

Those reviews are to be conducted by a Veterans' Service Review Panel, as required under section 219(3)-(4). The Veterans' Service Review Panel is appointed by the General Manager and exists specifically to review decisions about whether service is qualifying service or qualifying operational service. Section 223 sets out this function.

You have the right, under section 28(3) of the OIA, to ask an Ombudsman to review this response to your request. Information about how to make a complaint is available at www.ombudsman.parliament.nz or freephone 0800 802 602.

Please note that responses to official information requests are proactively released where possible. This response to your request will be published shortly on the NZDF website, with your personal information removed.

Yours sincerely

**JHR Selwood**
Captain, RNZN
Chief of Staff HQNZDF

**Enclosures:**
1. Delegation document – 5 December 2014
2. Delegation document – 6 November 2020
3. Memorandum of Understanding – 2 December 2014

[2] https://www.veteransaffairs.mil.nz/eligibility/qualifying-service/

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New Zealand VETERANS' AFFAIRS
Te Tira Ahu Ika A Whiro

# Instrument of Delegation in Relation to the Veteran's Pension

Pursuant to section 160 and 203 of the Veterans' Support Act 2014 (the Act) the General Manager of Veterans' Affairs New Zealand, with approval of the Chief of Defence Force (CDF), delegates to the Chief Executive of the Ministry of Social Development (MSD), being the department responsible for the administration of the Social Security Act 1964, all and every of the General Manager of Veterans' Affairs functions, duties and powers under:

a) Part 6 of the Act for the purpose of administering the Veteran's Pension;

b) any provision in the Social Security Act 1964 or the Social Welfare (Reciprocity Agreements and New Zealand Artificial Limb Service) Act 1990 that relates to the Veteran's Pension; and

c) section 212 of the Act for the purpose of appointing medical assessors to conduct medical examinations to assist in determining entitlement to the Veteran's Pension under section 164 of the Act.

To avoid doubt:

- the functions, duties and powers delegated to the Chief Executive MSD are to be exercised in accordance with the four principles in section 10(b) of the Act;
- the functions, duties and powers delegated to the Chief Executive of MSD are subject to the Code of Veterans' and Other Claimants' Rights;
- the Chief Executive of MSD may appoint medical practitioners and/or nurse practitioners under section 212 of the Act for the purpose of conducting a medical examination under section of 166 of the Act; and
- the Chief Executive of MSD may sub-delegate the functions, duties and powers that the Chief Executive of MSD has been granted to any person specified under section 41(2) of the State Sector Act 1988.

This delegation is made subject to the following conditions:

- when assessing whether a person is entitled to receive the single living alone rate of the Veteran's Pension within the meaning of section 158 of the Veterans' Support Act 2014, the Chief Executive of MSD (or the person(s) they sub-delegate this duty to) should only determine that the principal place of residence occupied by the person is a house or flat (for the purpose of section 159(6)(a) of the Veterans' Support Act 2014) if that residence—
  (a) is a structure, or part of a structure, that is permanently affixed to land; and

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(b) contains for the exclusive use of the occupant, adequate and distinct areas (whether or not in separate rooms)—
  (i) used for day to day living; and
  (ii) used for sleeping; and

(c) contains, for the exclusive use of the occupant,—
  (i) a kitchen or kitchenette with—
    (A) a sink with a tap connected to an adequate supply of potable water; and
    (B) adequate means of preparing and cooking food, including by boiling or by baking; and
    (C) adequate space for the proper storage of food and utensils; and
  (ii) a bathroom with a bath or shower and an adequate supply of hot water; and
  (iii) a toilet.

- the Chief Executive of MSD provides the General Manager of Veterans' Affairs all reasonable and practicable assistance in collecting information about the Veteran's Pension for the purposes of section 213 of the Act; and,

- the Chief Executive of MSD provides the CDF, or his delegated agent(s), all reasonable and practicable assistance in obtaining information about the Veteran's Pension for the purposes of section 282 of the Act.

I am issuing this Instrument of Delegation prior to the Veterans' Support Act 2014 coming into force on 7 December 2014, as permitted by section 11 of the Interpretation Act 1999.

This delegation comes into force on 7 December 2014 and continues to be in force until it is revoked or superseded.

Dated at Wellington this day 5th of December 2014

Jacki Couchman
General Manager

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Te Tira Ahu Ika A Whiro
VETERANS' AFFAIRS
New Zealand

**Instrument of Delegation in Relation to the Veteran's Pension**

Pursuant to section 160 and 203 of the Veterans' Support Act 2014 (the Act) the General Manager of Veterans' Affairs New Zealand, with approval of the Chief of Defence Force (CDF), delegates to the Chief Executive of the Ministry of Social Development (MSD), being the department responsible for the administration of the Social Security Act 2018, all and every of the General Manager of Veterans' Affairs functions, duties and powers under:

a) Part 6 of the Act for the purpose of administering the Veteran's Pension;

b) any provision in the Social Security Act 2018 that relates to the Veteran's Pension; and

c) section 212 of the Act for the purpose of appointing medical assessors to conduct medical examinations to assist in determining entitlement to the Veteran's Pension under section 164 of the Act.

To avoid doubt:

- the functions, duties and powers delegated to the Chief Executive of MSD are to be exercised in accordance with the four principles in section 10(b) of the Act;

- the functions, duties and powers delegated to the Chief Executive of MSD are subject to the Code of Veterans' and Other Claimants' Rights;

- the Chief Executive of MSD may appoint medical practitioners and/or nurse practitioners under section 212 of the Act for the purpose of conducting a medical examination under section 166 of the Act; and

- the Chief Executive of MSD may sub-delegate the functions, duties and powers that the Chief Executive of MSD has been granted to any person specified under section 41(2) of the State Sector Act 1988.

This delegation is made subject to the following conditions:

- when assessing whether a person is entitled to receive the single living alone rate of the Veteran's Pension within the meaning of section 158 of the Veterans' Support Act 2014, the Chief Executive of MSD (or the person(s) sub-delegated this duty by the Chief Executive of MSD) should only determine that the principal place of residence occupied by the person is a **house or flat** (for the purpose of section 159 of the Veterans' Support Act 2014) if that residence—

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(a) is a structure, or part of a structure, that is permanently affixed to land; and

(b) contains for the exclusive use of the occupant, adequate and distinct areas (whether or not in separate rooms)—

(i) used for day to day living; and

(ii) used for sleeping; and

(c) contains, for the exclusive use of the occupant,—

(i) a kitchen or kitchenette with—

(A) adequate means of preparing and cooking food, including by boiling or by baking; and

(B) adequate space for the proper storage of food and utensils; and

(ii) a bathroom with a bath or shower and an adequate supply of hot water; and

(iii) a toilet; and

(iv) a sink with a tap connected to an adequate supply of potable water.

- when assessing whether a person is entitled to receive the single living alone rate of the Veteran's Pension within the meaning of section 158 of the Veterans' Support Act 2014, the Chief Executive of MSD (or the person(s) sub-delegated this duty) should only determine that the principal place of residence occupied by the person is a **mobile home** (for the purpose of section 159 of the Veterans' Support Act 2014) where—

(a) That residence

(i) contains for the exclusive use of the occupant, adequate areas—

(a) used for day to day living; and

(b) used for sleeping; and

(c) used for preparing and cooking food; and

(ii) contains, for the exclusive use of the occupant,—

(a) a sink; and

(b) a toilet; and

(iii) is sufficiently self-contained to be reasonably habitable as a residence.

(b) The occupant has access to facilities for bathing or showering, whether or not these are permanently located within the mobile home.

- When assessing whether or not a mobile home is sufficiently self-contained to be reasonably habitable as a residence, the Chief Executive of MSD (or the person (s) sub-delegated this duty) should only determine so where—

(a) That mobile home –

(i) is equipped with —

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(a) a fresh water tank or tanks; and

(b) a waste water tank or tanks; —

whether or not the mobile home is from time to time connected to water and waste water supplies.

- the Chief Executive of MSD provides the General Manager of Veterans' Affairs all reasonable and practicable assistance in collecting information about the Veteran's Pension for the purposes of section 213 of the Act; and,

- the Chief Executive of MSD provides the CDF, or his delegated agent(s), all reasonable and practicable assistance in obtaining information about the Veteran's Pension for the purposes of section 282 of the Act.

I revoke and replace the delegation made on 18 September 2020 with this delegation.

This delegation comes into force on 6 November 2020 and continues to be in force until it is revoked or superseded.

Dated at Wellington this day 6th of NOVEMBER 2020

Bernadine Mackenzie
General Manager
Veterans' Affairs New Zealand

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# MEMORANDUM OF UNDERSTANDING

**Between The Sovereign in right of New Zealand acting by and through the Chief Executive of the Ministry of Social Development ("MSD ")**
**and**
**New Zealand Defence Force ("NZDF")**

Together referred to as "the Participants".

The Participants have come together in collaboration to provide veterans with an effective and efficient service when administering the Veterans' Support Act 2014.

## 1. Background

1.1 On 7 August 2014 the Veterans' Support Act 2014 ("the Act") was granted Royal assent, with the Act commencing on 7 December 2014 and repealing the War Pensions Act 1954.

1.2 Veterans' Affairs New Zealand ("VA") is established as a unit of the NZDF pursuant to section 198 of the Act. The General Manager of VA has, and may perform and exercise, all the functions and powers necessary for the administration of the Act.

1.3 Under delegation from the General Manager of VA, made in accordance with section 160 of the Act, MSD will continue to have full responsibility for granting, payment and cancellation of Veteran's Pensions, and its associated lump sum payments, in accordance with Part 6 of the Act.

1.4 MSD (with the assistance of VA) will continue to forecast and monitor expenditure for all entitlements and weekly compensation and provide this information to VA. Further background regarding forecasting and costing is included in Schedule One.

1.5 There are four documents that guide the relationship between VA and MSD:

1.5.1 Section 160 of the Act – Delegation of General Manager's functions

1.5.2 Instrument of Delegation

1.5.3 Memorandum of Understanding, 14 August 2008

1.5.4 Service Delivery Agreement, 21 October 2008

1.6 This Memorandum of Understanding replaces and consolidates 1.5.3 and 1.5.4 above.

## 2. Purpose

2.1 The purpose of this Memorandum of Understanding ("this Memorandum") is to facilitate the relationship between MSD and VA. This is achieved by outlining the roles and responsibilities of MSD and VA in relation to the administration of the Act, including forecasting and monitoring of benefits or related expenses appropriations within Vote Defence Force and the annual general adjustment to rates and amounts for entitlements provided under the Act.

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## 3. Collaboration between VA and MSD

3.1 VA and MSD will:

3.1.1 Work collaboratively to ensure eligible veterans, spouses and partners receive their correct and full entitlements under Part 6 of the Act.

3.1.2 Co-operate to ensure that the range of services outlined in Schedule One and Two are provided.

3.1.3 Fulfil their respective responsibilities as set out in this Memorandum.

3.1.4 Meet the requirements of the Privacy Act 1993.

3.1.5 Communicate effectively and operate with a philosophy of 'no surprises'.

## 4. Ministerial Servicing and Support

4.1 NZDF will have responsibility for the following:

4.1.1 Attendance at Select Committee and answering associated written questions for Veterans' Support Act 2014 entitlements, Special Annuities and other veteran related issues.

4.1.2 Attendance where requested by the Minister of Veterans' Affairs at Parliamentary debates.

4.1.3 Answering parliamentary questions, ministerial enquiries and associated questions for Veterans' Support Act 2014 entitlements, Special Annuities and other veteran related issues.

4.1.4 Answering Official Information Act and Privacy Act requests associated with Veterans' Support Act 2014 entitlements, Special Annuities and other veteran related issues.

4.1.5 Policy decisions and legislative amendments associated with the adjustment of rates of entitlements provided under the Veterans' Support Act 2014 and Special Annuities;

4.2 MSD will have responsibility for:

4.2.1 Attendance at Select committee and answering associated questions for Veteran's Pension.

4.2.2 Answering parliamentary questions and ministerial enquiries and associated questions for Veteran's Pension.

4.2.3 Answering Official Information Act and Privacy Act requests associated with Veteran's Pension.

## 5. Confidentiality

5.1 Both Participants will maintain the confidentiality of all information received from the other Participant including the responsibilities set out in Schedule Three.

## 6. Security

6.1 Both Participants will take all reasonable steps to hold all information supplied to it under this Memorandum securely and prevent unauthorised access to the information. See Schedule Three for further information.

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## 7. Resolution of Disputes and Issues

7.1 Any dispute or issue between the Participants arising out of the relationship between MSD and VA in relation this Memorandum may be resolved by the General Manager, VA, and the Manager, Centralised Services, MSD or the General Manager, Insights MSD, MSD in the first instance.

7.2 If agreement cannot be reached then the dispute or issue will be submitted to each Participants respective Chief Executive within 5 working days of receiving written notice of the escalation of the dispute.

7.3 The Chief Executives of the Participants, or their delegates, will meet as soon as practicable after the preparation of the summary or summaries in order to resolve the dispute.

## 8. Term and Earlier Agreements Rescinded

8.1 This Memorandum comes into effect on 7 December 2014.

8.2 The Participants will review the terms of this Memorandum annually by 31 August each year. In the event that this is not possible both Participants agree to abide by the Memorandum of Understanding in place until a review has been finalised.

8.3 Either Participant may terminate this Memorandum by giving three months' notice, in writing, to the other Participant.

8.4 This Memorandum of Understanding replaces and rescinds the Memorandum of Understanding, signed 14 August 2008, and the Service Delivery Agreement, signed 21 October 2008.

## 9. Variation

9.1 The Participants may from time to time mutually agree to vary the terms of this Memorandum. No variation to this Memorandum will be effective unless it is in writing and signed by both Participants.

## 10. Legal Effect

10.1 This Memorandum does not create legally binding obligations between MSD and VA.

## 11. Relationship Management

11.1 The Participants each have a vested interest in the effectiveness of this Memorandum. To facilitate this relationship, each Participant has nominated a Relationship Manager(s). The Relationship Managers' details are contained in Schedule Four.

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**SIGNED** for and on behalf of the General Manager of Veterans' Affairs in the presence of: )

Signature 2/12/14

Name Jacqueline Ellen Cachman

Signature

Michael James Moran 2/12/14
Name

142 Lambton Quay
Address

Senior Financial Adviser
Occupation

**SIGNED** for and on behalf of the Chief Executive of the Ministry of Social Development in the presence of: )

Signature 2/12/14

Name Lindsay John Meehan

Signature

Kalliope (Pepi) Batsos
Name

Bowen State Building, Bowen Street, Wellington
Address

National Manager, Service Development and Support, Senior Services, MSD
Occupation

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## SCHEDULE ONE

**Forecasting and Monitoring**

### 1. Background

1.1. On 1 July 2008 the NZDF took responsibility for the processing and payments of War Disablement Pensions and Surviving Spouse Pensions and the associated allowances and concessions, Medical Treatment and Interest Concessions Land and Buildings payments associated with the Rehabilitation Loan programme that was discontinued in 1991. This is delivered by the NZDF through its unit, VA.

1.2. From 2009/10, Special Annuities were also incorporated into this arrangement, and Interest Concessions Land and Buildings payments were merged into War Disablement Pensions from 2013/14. Vote Veterans' Affairs-Defence Force was also merged into Vote Defence Force from 2013/14.

1.3. From 7 December 2014 the appropriation names and scope statements for War Disablement Pensions and Medical Treatment changed in line with the wider scope of assistance to veterans with the commencement of the Veterans' Support Act 2014. The new titles are Veterans Support Entitlements and Assessments, Treatment and Rehabilitation respectively.

1.4. Under delegation from the General Manager VA, made in accordance with section 160 of the Act, MSD will continue to have full responsibility for granting, payment and cancellation of Veteran's Pensions, and its associated lump sum payments, in accordance with Part 6 of the Act.

1.5. Outside of the above delegations the Forecasting and Costing team at MSD (working with assistance from the VA resource as described in 3.5 below) will forecast and monitor expenditure and provide this information to VA for veterans, spouses/partners, children and dependants grand-parented on entitlements granted under the War Pensions Act 1954 and from 7 December 2014 veterans, spouses/partners, children and dependants receiving entitlements and assistance under the provisions of the Veterans' Support Act 2014.

### 2. Working Together

2.1. VA may use individual forecasting reports ("Forecasting Reports") prepared by MSD in accordance with section 6 of this Schedule, for the purposes of the administration of VA appropriations within Vote Defence Force and the provision of governance and monitoring advice to Ministers.

2.2. VA will follow a 'no surprises" policy to ensure that the information used from any reports prepared by MSD is used in an appropriate manner.

2.3. MSD and VA will work together on the Annual General Adjustment (AGA) to entitlements provided under the Veterans' Support Act 2014 and Special Annuities. However, VA will ensure the correct update to payment rates from the AGA occurs.

2.4. Where data provided to MSD by VA is incomplete or inaccurate and MSD notifies VA of this, then VA understands that the forecasts and costing estimates will be subject to error.

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## 3. Roles and Functions of VA

3.1. VA will prepare and provide MSD with a monthly copy of War and Maintenance ("WAR")[1], and other data reports and relevant accruals data as detailed in section 7 of this Schedule (Data Requirements). This will include data provided in relation to Scheme One entitlements commencing 7 December 2014. VA will also inform MSD of any information that may affect benefit expenditure. Such information includes, but is not limited to, details of policy changes or changes in operational practice at VA that are expected to result in changes to benefit expenditure.

3.2. All data supplied to MSD should be accurate and in accordance with VA's internal quality control processes.

3.3. All data relating to the fiscal month will be supplied by VA to MSD by the end of the second complete working week of the following month.

3.4. NZDF is responsible for forecasting entitlements provided under the Veterans' Support Act 2014 (including Special Annuities) and are responsible for the supply of sufficient policy information and data to enable MSD to cost law and policy proposals associated with these payments.

3.5. Within six months of the date of this Memorandum NZDF will provide resource to:

3.5.1. Be a single point of contact for data flows between MSD and VA related to this Schedule; and

3.5.2. Assist MSD to develop information requirements for any legalisation change or implementation affecting this Schedule; and

3.5.3. Assist with costing/modelling and parliamentary servicing requests; and

3.5.4. Work with MSD to understand the models for forecasting, quality assurance and to build costing models, including for annual general adjustment.

3.6. VA will provide sufficient information and data to MSD to factor any policy, operational or other changes into the forecasting models. VA will also report to MSD any issues in relation to the draft Joint Ministers Reports (see 4.1 of this Schedule) in a timely manner.

3.7. VA will ensure that all legislative requirements for the annual general adjustment are met. VA will provide sufficient information and data to MSD to enable the annual adjustment to payment rates for inflation and wage pegs to be calculated.

## 4. Joint Roles and Functions

4.1. MSD will work with the VA resource (clause 3.5) to prepare and supply to VA and the Treasury, Joint Ministers Reports following each forecast update in accordance with section 6 of this Schedule (Reports) for comment by VA.

[1] A replacement IT System to WAR is being built by VA for delivery in 2015/16. At this time the monthly replica requirement will cease, to be replaced by a list of MSD monthly reporting requirements. This will be included within this MOU as a separate schedule when the replacement IT system becomes available.

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4.2. MSD will work with the VA resource (clause 3.5) to prepare and supply to VA, Forecasting Reports in accordance with section 6 of this Schedule (Reports).

4.3. MSD will work with the VA resource (clause 3.5) to undertake cost modelling relating to policy work that may affect expenditure on entitlements provided under the Veterans' Support Act 2014 and Special Annuities as required. Where a request for such work from VA extends beyond what is reasonably considered standard policy costing[2] work then on the prior agreement of both Participants the time taken by MSD to complete the work is to be maintained and the VA will pay for such services on an invoice basis based on the hourly rate of the Analyst's gross salary (exclusive of overheads).

4.4. Models currently exist to update the payment rates for entitlements provided under the War Pensions Act 1954 and/or War Pensions Regulations 1956 (now grand-parented under the Veterans' Support Act 2014) and Special Annuities as part of the Annual General Adjustment of benefit rates, which comes into effect every 1 April.

4.5. VA will ensure a new set of models is developed to update the payment rates for entitlements provided under the Veterans' Support Act 2014 as part of the Annual General Adjustment of benefit rates, which comes into effect each 1 April. The scoping of this work will take place outside of this MOU.

4.6. All models need to be maintained and updated for every annual adjustment round. MSD and the VA resource (clause 3.5) will work together to update and check the models each year.

4.7. MSD will work with the VA resource (clause 3.5) to supply VA with the necessary data for the following Parliamentary servicing activities that directly flow from Crown expenditure reporting covered by this Memorandum in accordance with Schedule One of this Memorandum:

4.7.1. Select Committees; and

4.7.2. Parliamentary Debates; and

4.7.3. Parliamentary Questions and Ministerial enquiries; and

4.7.4. Official Information Act and Privacy Act requests; and

4.7.5. Adjustment of Rates of entitlements provided under the Veterans' Support Act 2014 and Special Annuities; and

4.7.6. Law and Policy Proposals.

4.8. Forecasts relating to Crown expenditure will:

4.8.1. Meet the requirements of CAB (94) M1/5 (h) including the requirement that forecasts are mid-point estimates; and

4.8.2. As much as possible, forecast expenditure to within 2% or $10,000 of the full year expenditure so that VA can meet the requirements of the Public Finance Act 1989; and

4.8.3. Be free from material computational error.

[2] Standard policy costing work includes ad-hoc costing of new Government policy initiatives but not extended periods of more than the equivalent of 8 hours' work.

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## 5. Costs

5.1. Other than as provided for in clause 4.3 above, there are no cost reimbursements between VA and MSD for forecasting or costing work.

5.2. In the event of changes to the scope or nature of the forecasting and monitoring work the Participants agree to review the funding and costs involved.

## 6. Reports

6.1. MSD will work with the VA resource (clause 3.5) to prepare, and supply to The Treasury and VA, Forecasting Reports regarding Crown expenditure on entitlements provided under the Veterans' Support Act 2014 and Special Annuities benefits in relation to benefits or related expenses appropriations contained within Vote Defence Force. The Forecasting Reports will be on an accrual basis, and include detailed commentary and supporting graphs and tables.

6.2. The Reports will be supplied to VA in accordance with the timetable determined by The Treasury for all Economic and Fiscal Update forecasting rounds in any year.

6.3. The exact timing of any or all of the Forecasting Reports may alter from that referred to above due to:

6.3.1. The timing of the forecasting rounds; or

6.3.2. The requirements of Government or of The Treasury; or

6.3.3. Any other circumstances beyond MSD's reasonable control.

6.4. MSD will work with the VA resource (clause 3.5) to provide information for Parliamentary servicing activities:

6.4.1. Within 3 working days from the time of request for Parliamentary Questions.

6.4.2. Within a deadline agreed at the time, to enable VA to meet Minister/Parliament deadlines, for all other services.

6.5. Following each forecast round, MSD will draft a Joint Ministers' report to enable the forecast to be approved by relevant Ministers.

## 7. Data requirements

7.1. VA will supply MSD with the following data required to complete forecasting:

7.1.1. The WAR database information (or any replacement system) which needs to be replicated with daily data, and the full transaction history (subject to clause 3.1 of this Schedule).

7.1.2. Entitlements provided under the Veterans' Support Act 2014 - Expenditure broken down by Qualifying Service[3]. The Qualifying Service list is updated regularly and held by VA.

[3] That is, all components for which an account code exists.

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## SCHEDULE TWO

### 1. Veterans' Pension

1.1 VA and MSD will work together in collaboration, on a day to day basis, to deliver veterans an effective and efficient service when administering the Veterans' Support Act 2014.

1.2 To enable this collaborative service VA and MSD will use available methods of communication on a daily basis, including but not limited to: telephone, email and face to face meetings.

### 2. Exchange of Information

2.1 All information exchanged will comply with the requirements of the Privacy Act 1993.

2.2 All information required for the processing and payment of entitlements will be held by VA and made available, on request, to MSD.

2.3 All information and data relating to the payment of Veteran's Pensions will be held by MSD and made available, on request, to VA.

2.4 VA and MSD agree to exchange information on a daily basis should the information impact on the entitlements being processed and maintained by either Participant. Information includes but is not limited to:

2.4.1 Veteran's contact details;

2.4.2 Death notification and relevant details;

2.4.3 Qualifying service confirmation;

2.4.4 Veteran's relationship status; and

2.4.5 Other changes in circumstance for the veteran, bank account details for example.

### 3. Social Welfare Number to enable payments by VA

3.1 When a VA applicant does not have an existing Social Welfare Number ("SWN"), the following process will be initiated in order for MSD to provide VA with a SWN number for that client, to allow payments to be made by VA.

3.2 VA staff will check to see if the applicant is an existing client. If no client record is found VA staff will contact the Veteran's Pension Team of MSD ("Veteran's Pension Team").

3.3 The Veteran's Pension Team will check to see if the client is currently in receipt of any entitlement from MSD.

3.4 The Veteran's Pension Team will check for the client and add them to UCVll if not found.

3.5 The Veteran's Pension Team will supply the SWN number and any entitlement information to VA, via email within 24 hours of receipt of the request.

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## 4. Verifying Service for MSD

4.1 Where verification of service is required prior to the granting of a Veterans' Pension, the service verification remains the responsibility of VA.

4.2 When this is required the following process will be implemented:

4.2.1 MSD will make a request to VA providing the veterans service details. VA will check the service and provide MSD with written confirmation to verify whether the veteran has eligible service for Veteran's Pension purposes.

4.2.2 The verification will be returned to the Veteran's Pension Team within four working days (Monday to Friday) of receipt of the request. Where this is not practicable VA will respond to MSD as early as practicable with an estimated timeframe for verification delivery.

## 5. Information Technology Equipment Access - Hamilton

5.1 The VA Engineering Server and VA PABX equipment are secured in an equipment rack, located in MSD's Server Room, on level 10, Anglesea Tower, Hamilton.

5.2 VA is the only Participant that has a key to the equipment rack. MSD will retain access control over the server room itself and allow access to VA staff on request.

5.3 Access requirements are preferred within a 24 hour notice period but it is understood that urgent issues may arise requiring the access notice period to be reduced.

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## SCHEDULE THREE

### 1. Information Security, Privacy and Confidentiality

1.1. All information supplied under this Memorandum is "in confidence" and shall be supplied by way of encrypted medium. Methods of information supply include:

1.1.1. Telephone – MSD and VA staff (Employees) are identified by use of a password maintained by the VA Team Manager and MSD Veteran's Pension Centre Service Manager.

1.1.2. SEEMail – gateway to gateway encrypted email service.

1.2. All datasets will be transferred on CD, iron key, or other suitable protected delivery mechanism.

1.3. Employees handling the data will comply with the Privacy Act 1993 (and any other applicable legislation)

1.4. Further, the Participants will ensure that:

1.4.1. All information is protected from unauthorised access, use and disclosure;

1.4.2. All information is stored on a securely managed computer system with password and firewall protection.

1.4.3. Access to all information is allowed only by Employees doing work directly relating to this Memorandum;

1.4.4. All Employees dealing with the information are aware of their responsibilities in relation to this Memorandum and the strict limitations on the use and disclosure of information;

1.4.5. No information will be removed or transferred other than as allowed under this Memorandum.

### 2. Breaches of Security, Privacy or Confidentiality

2.1. The Participants should immediately notify the other Participant of any actual or suspected unauthorised use or disclosure of any information exchanged pursuant to this Memorandum.

2.2. The Participants will also investigate any actual or suspected unauthorised use or disclosure of information.

2.3. If either Participant has reasonable cause to believe that a breach of any other security provision in this Memorandum has occurred or may occur, that Participant may undertake such investigation as it deems necessary.

2.4. Where an investigation is undertaken under this section, the other Participant will provide the investigating Participant with reasonable assistance, and the investigating Participant will keep the other Participant informed of progress.

2.5. If there has been a security breach, either Participant may suspend this Memorandum by notice in writing to give the other Participant time to remedy the breach.

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## 3. Destruction of Information

3.1. Subject to the provisions of the Public Record Act 2005, the Participants will ensure that all information is permanently deleted as soon as it is no longer required for the purposes of this Memorandum.

Released under the Official Information Act 1982

## SCHEDULE FOUR

**Relationship Managers**

Forecasting Relationship Managers

MSD: Team Manager Forecasting and Costing, Insights MSD

VA: Senior Financial Advisor, VA

Veterans' Entitlements Relationship Managers

MSD: Service Manager Veteran's Pension Centre

VA: Manager Veterans' Services