Australian Government

Services Australia

Agreement liaisons, NZ CICs and exchange of information 106-04020000

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Background

For Centrelink International Services (CIS) staff.

This document outlines what a liaison is and how Centrelink International Services (CIS) staff complete them.

Exchange of information

The exchange of customer information with agreement countries is authorised under social security law, subject to the provisions of each [international social security agreement](#).

Only staff in Centrelink International Services (CIS) are authorised to exchange information with agreement countries.

Only exchange information for social security purposes. Services Australia is not obligated to carry out administrative measures:

- outside Australian law, **or**

- that are at odds with normal administrative practices

For example, the Services Australia **can** provide an agreement country a person's last known address or executor details if they are on record. However, the agency **will not** write to customers on behalf of an agreement country.

There is no authority to exchange information with non-agreement countries, including the United Kingdom. Customers need to contact those countries directly for any information they require. Contact details for [foreign pension authorities](#) are available on the s47E(d) screen.

Some bulk data exchanges are in place with particular countries under the [International Data Exchange Program](#).

See [Resources](#) for details about the [exchange of information](#), including the details Services Australia can provide an agreement country and details the agreement country can provide to the agency.

Agreement liaisons

Liaisons are a two-way process using agreed format and channels. A liaison form is the most common channel of communication used but an exchange of information may be via:

- phone

- forms, for example, Australian liaison form (AUS187)

- email

- electronic transmission (s47E(d)   , or s47E(d)

- automated data exchange (DEX) including Changes in Circumstances from New Zealand (NZ CICs), or

- manual

The Australian liaison form (AUS187) contains:

- customer identification information

- sections to request information from an agreement partner

- sections to provide information to an agreement partner

The AUS187 form is:

- electronic

- generated from the s47E(d)   screen, and

- can be downloaded from Forms Online if necessary (for example, for deceased customers)

The agreement partner will normally use a similar form or free text letter providing the necessary information or requesting information. s22 (out of scope)

Always send the AUS187 form:

- when sending a foreign pension claim to an agreement partner

- to advise the outcome of **all** claims for Australian payment lodged from overseas

- to advise the rejection of claims under the agreement with New Zealand lodged in Australia and the customer has a defined New Zealand benefit

Exchange methods

Agreement liaisons are sent in paper format via ordinary mail and electronically for countries that have agreed to electronic methods.

Some countries use web services through Centrelink Business Online Services (CBOS) including:

- s47E(d)   - this allows digitised files to be sent and received. For example, pension claims and liaison forms

- s47E(d)   - this portal provides Australian pension information in real time through the Unified Government Gateway (UGG)

Use the International Liaison email address to communicate with agreement partners. **Only** use this email address with agreement countries that have agreed to digital transmission.

There is also a manual electronic liaison exchange with the Ministry of Social Development (MSD) in New Zealand using the s47E(d)   portal.

See Agreement Liaison Details (ALD) for methods of transmission, expected response times, file naming conventions and any additional country-specific requirements in relation to the transmission/receipt of liaisons.

New Zealand Change of Circumstances (CIC) activities

An automated bulk liaison system is in place under the agreement with New Zealand (NZ) using the NZ Change in Circumstance activities (CICs) process.

Specified changes to a mutual customer's record by one country are:

- consolidated into a file at the end of each business day, and

- sent to the other country the next morning via secure internet protocols

A data validation routine compares the following details from the CIC file with the information in the customer's record:

- the Australian Customer Reference Number (CRN)

- the New Zealand's Social Welfare Number (SWN), **and**

- the customer's date of birth

Records that fail validation (mismatches) are sent to CIS via email for manual action.

CIC files may contain several transactions at once, such as:

- change of rate

- address

- relationship status

Rate transactions are applied automatically to the customer record. Those that cannot be applied automatically, along with non-rate transaction types, generate work items for processing.

NZ authorities have different rules for recording and verifying information, including different date of effect rules. As such, consider all non-rate CICs as an indication of a change. Customers will still need to be contacted to confirm the change and obtain more information or verification, as necessary.

The Resources page contains contact details, liaison information attachments, information about the Australian liaison form (AUS187), exchange of information, liaison classification codes, Change in Circumstance (CIC) types and actions required, insufficient information provided by the agreement partner and intranet links.

Related links

[Agreement Liaison Details (ALD)](#)

[International Social Security Agreements](#)

[International Data Exchange Program and auto indexation of foreign pensions](#)

[Claims for Australian payments under International Agreements](#)

[Foreign pension claims](#)

[Foreign pension coding](#)

Process

For Centrelink International Services (CIS) staff.

This document outlines what a liaison is and how Centrelink International Services (CIS) staff complete them.

On this page:

[Agreement liaisons](#)

[Incoming agreement liaisons](#)

[Processing New Zealand Change in Circumstance (CIC) files](#)

[Processing an agreement liaison](#)

[Creating an agreement liaison](#)

[Sending an electronic agreement liaison](#)

[Electronic file handling](#)

[Coding the](#) s47E(d) screen

Agreement liaisons

Table 1

Step	Action
1	**Agreement liaisons** + Read more … Is the agreement liaison written or verbal? • **Written,** [go to Step 2](#) • **Verbal,** [go to Step 3](#)
2	**Written agreement liaisons** + Read more …

	Liaisons are used for various business purposes to exchange information. For written liaisons, digitise and upload the following to the customer's record (including non-customers):
	• a copy of the Australian liaison form (AUS187), and
	• documentation provided with the liaison received
	Some agreement countries have agreed to transmit liaisons electronically. See Agreement Liaison Details (ALD).
3	**Verbal agreement liaisons** + Read more …
	When **contacting** the agreement partner by telephone, or the agreement partner is contacting Services Australia by telephone:
	• get/provide the relevant information
	• make any relevant updates to the customer's record when required
	• record details of the conversation on the s47E(d) screen
	Note:
	• Agreement partners s22 (out of scope) have authority to enquire and get details on behalf of mutual customers. See Italy Agreement and foreign pension information
	• Telephone contact to/from Work and Income NZ (WINZ) will need a verbal password from the initiating party. Staff can get a password from CIS Service Support Officer (SSO)
	Procedure ends here.
4	**Processing liaisons** + Read more …
	• **Re-categorising** work item as a liaison:
	o in Work Optimiser, re-categorise the work item to the appropriate liaison work type
	o procedure ends here
	• **Retrieving and uploading** liaisons that have been received electronically, see Table 2
	• **Processing** a Change in Circumstances (CIC) including mismatches, see Table 3
	• **Processing** other scanned liaisons (including liaison review), see Table 4
	• **Creating** a liaison, see Table 5

	• **Sending** a liaison, see Table 6

Incoming agreement liaisons

Table 2: this table is **only** for Centrelink International Services (CIS) staff scheduled for **incoming** liaisons/correspondence.

Step	Action

1	**Retrieve electronic liaisons** + Read more …
	
	Liaisons may be received in paper forms via ordinary mail or electronically.
	
	Only CIS staff with electronic liaison access can retrieve correspondence from email, s47E(d) or s47E(d)
	
	See Resources for how to request access.
	
	Does a liaison need to be retrieved from email, s47E(d) **or** s47E(d)
	
	• **Yes:**
	
	    o Email, go to Step 2
	
	    o s47E(d) see How to use s47E(d) on Resources and go to Step 2
	
	    o s47E(d) see How to use s47E(d) on Resources and go to Step 2
	
	• **No**, liaison needs to be scanned, go to Step 3

2	**Triaging incoming liaisons** + Read more …
	
	Emails and s47E(d) **must** be processed in reverse chronological order. That is, starting with the oldest first.
	
	Incoming email processing:
	  s47E(d)
	
	• for emails from:
	
	    o CIS Helpdesk, go to Step 4
	
	    o New Zealand (NZ) about the 'NZ SWN list' for multiple customers, go to Step 5
	
	    o Mail Content Manager or Mail Delivery System, go to Step 6
	
	    o an escalation, for example, following-up some earlier communication, go to Step 7

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       ○   spam or [phishing](#), [go to Step 8](#)

       ○   an agreement partner containing multiple customers, [go to Step 12](#)

       ○   anything else, [go to Step 10](#)

Incoming [s47E(d)] processing:

- when processing each [s47E(d)] document, if it is from:

       ○   s22 (out of scope)

       ○

- cannot be opened:

       ○   s47E(d)

       ○

       ○   procedure ends here

For liaisons that are received by any channel **other** than email or [s47E(d)] [go to Step 10](#).

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Scan paper liaison + Read more …

Where the liaison is received via ordinary mail:

- remove all staples, paper clips and similar in preparation for scan

- make sure pages in forms are in page sequential order

- scan multiple forms individually. For example, scan an Australian pension claim (AUS140) form, Income and Assets (MOD iA) form and a liaison form from the agreement partner as 3 separate documents. See How to scan paper document to local secure drive on [Resources](#)

- when the liaison has been scanned using a multifunction device (MFD) it will need to be uploaded to the customer's record

- [go to Step 10](#)

See [Scanning Centrelink documents using an MFD](#) for more details and international classification coversheets.

Save to the local secure drive.

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Virtual Support Officer (VSSO) response received + Read more …

Did the CIS Helpdesk provide a Customer Reference Number (CRN)?

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- **Yes:**
  - s47E(d)

    - go to Step 11

- **No**, add the new customer:

  - when creating a record for foreign liaison purposes, code:
    s47E(d)

    - go to Step 11

See Resources if there is insufficient information to add a new customer.

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Social Welfare Number list received from NZ (NZ SWN list) + Read more …

Code the New Zealand (NZ) reference number (SWN) on the s47E(d) screen. This is so authorised staff in the NZ pension authority can access customers' Australian rates of payment using the s47E(d) portal.

Note: some SWNs start with a zero which may be dropped by the number format in the spreadsheet. If this happens, s47E(d) to ensure it is always 9 digits long.

Open attachment in the email and for **each customer** on the list:

s47E(d)

Procedure ends here.

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Mail Content Manager or Mail Delivery System email received + Read more …

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	Email has been quarantined by Cyber Security and needs more action so it can be released.
	Establish if the email is legitimate and work related:
	- if email is from approved agreement contact email address or from an approved domain: - follow included instructions to request immediate release of the email - procedure ends here - if email is not work related: - file in Junk folder in the email folder - procedure ends here
7	**Escalations** + Read more ... Where it is clear that the email/correspondence is an escalation or urgent follow-up from the agreement country, these must be forwarded to International Agreements: - Email: s47E(d) - procedure ends here - s47E(d) s47E(d) - procedure ends here
8	**Spam or phishing** + Read more ... Staff must report all suspected spam, phishing or spear phishing emails. Procedure ends here.
9	s22 (out of scope)

	s22 (out of scope)

10	**Search for customer's record** + Read more ...
	
	Use the information in the liaison to find the customer's record.
	
	Note: care must be taken to determine the correct customer where the liaison involves members of a couple.
	
	For example, where the liaison indicates a contributor but also includes a surviving partner claiming a widow pension, the customer is likely to be the surviving partner, not the contributor. See Resources for a sample **DOC**.
	
	See:
	
	- Searching for a customer on the system, and
	
	- Multicultural Guide
	
	Notes:
	
	- s47E(d) screen can be used if there is a foreign pension reference number
	
	- s47E(d) screen can be used if there is an email or phone number
	
	Was the customer's record found?
	
	- **Yes**, go to Step 11
	
	- **No:**
	
	       o if processing **emails**:
	          s47E(d)
	
	          - procedure ends here
	
	       o if processing s47E(d) including the Malta NOG list
	          s47E(d)
	
	          - procedure ends here

11	**Classifying and uploading the liaison**
	Save the liaison + Read more ...
	Save the liaison to the s47E(d) folder, see Table 7 > Item 1. Make sure the file is saved using the appropriate naming conventions. See Agreement Liaison Details (ALD).
	If the incoming file is:
	• zipped, unzip the files before uploading, see Table 7 > Item 3
	• larger than 10Mb, split the files before uploading, see Table 7 > Item 4 **Note:** use Process Direct to upload documents as Customer First upload is limited to 5Mb
	Classifying liaison with multiple forms and documents + Read more ...
	It is common that forms and customer documents may be received with a liaison. When this happens, check the liaison to determine why this information has been received.
	The forms and documents included will need to be uploaded as their form/document type, including the liaison: Use:
	• appropriate INT code for the liaison from the agreement partner
	• form code for Australian forms
	• See Attaching electronic documents to a Centrelink customer's record
	Only one work item should be created when there are multiple documents included with the liaison or files are split.
	If repeated documents/liaison requests are received and there is a relevant existing work item, **do not** create a new work item. Upload the documents/liaison request and s47E(d) . Make sure the original work item remains open.
	Select:
	s47E(d)
	For example:
	A liaison is received that includes:
	• forms AUS140CY(G), AUS178CY and MOD(IA)CYG, and

- various foreign documents that look like bank statements and identity documents

The liaison should say that the forms are for the applicant's claim for Age Pension.

Upload the forms and documents to the customer's record as:

- AUS140CY(G)

- AUS178CY

- MOD(IA)CYG

- INTLIA

- UNS006

- UNS011

Select:
s47E(d)

Form codes are found on the bottom left corner of the page.

International form codes will also include:

- the 2-letter country code

- the language (where required)

- four digits at the end that represent the year (2 digits) and month (2 digits) of latest authorised update

Form code examples:

- AUS140CY(T).2006:

    o form code is AUS140 (claim for Australian Pension)

    o country code is CY - Cyprus

    o language code is (T) - Turkish

    o latest update was June 2020

- Mod(iA)CHF.2012:

    o form code is Mod (iA) income and assets

    o country code is CH - Switzerland

    o language code is (F) - French

    o latest update was December 2020

Upload the liaison + Read more …

Upload the liaison using the appropriate international form code or liaison work type. Make sure s47E(d)   is the date the **original** email/s47E(d) was received. **Do not:**

- create multiples of the same work type

- complete older work items and replace with a newer work item

If repeated documents/liaison requests are received and there is a relevant existing work item, **do not** create a new work item. Upload the documents/liaison request and s47E(d)   . Make sure the original work item remains open.

Front of line updates + Read more …

If no front of line updates is needed, record receipt of online correspondence, as set out below.

Updates to the customer's record must be done front of line if the liaison advises changes or updates to any of the following:

- Customer contact details including

    o telephone details. See Updating telephone details and/or paying Telephone Allowance (TAL)

    o address/accommodation. See Updating address details. Consider other actions that may be needed when updating address/accommodation details. See Table 4 in Updating address details

- Nominee forms. See Adding or rejecting a nominee request

- Payment destination update. See Delivery of payments to Centrelink customers outside Australia and s47E(d)

- Record receipt of online correspondence, as set out below

Record receipt of online correspondence

- Document receipt on the customer's record:

    o Create a Fast Note. s47E(d)

    o s47E(d)

- If received by email, complete the email:

    s47E(d)

		• If received by s47E(d) s47E(d) Procedure ends here. **Note:** if the liaison is only advising of the front of line updates, complete the work item created when uploading the liaison to the customer's record.

12		**Agreement partner email containing multiple customers** + Read more ...
		
		Note: staff must take care to only upload customer related details to the customer's record. Make sure other customers' details from the email are not included.
		
		To action the email staff must:
		  s47E(d)
		
		• upload to the customer's record:
		  s47E(d)
		
		  s47E(d)
		
		Are front of line updates needed?
		
		• **Yes:**
		  ○ action and complete
		  ○ record receipt of online correspondence, as set out below
		  ○ procedure ends here
		• **No**, record receipt of online correspondence:
		  ○ Create a Fast Note, s47E(d)
		
		  ○ s47E(d)
		
		  ○ When all customer details from the agreement partner email are uploaded to their records:
		     s47E(d)

	s47E(d)
	Note: if the email is only advising of the front of line updates, complete the work item created when uploading the liaison to the customer's record. Procedure ends here.

Processing New Zealand Change in Circumstance (CIC) files

Table 3

Step	Action
1	**Dealing with CIC queries from New Zealand (NZ)** + Read more … NZ authorities have access to the s47E(d) which should be used to confirm current information in the first instance, including rates of Australian pension. CIC information sent to NZ is derived directly from the Centrelink system and can be confirmed. However, it is important to note that the information in CICs is sent the day after the action is updated on the Australian record regardless of the date of effect of that change. **Note:** information sent via CIC is an official liaison and there should be no need to reconfirm information manually unless there is an unexpected result. Escalate any requests from the NZ authorities that are outside the agreed arrangements to International Agreements.
2	**Confirmation of NZ file** + Read more … Confirmation of the receipt of a CIC file from NZ each day is sent to Centrelink International Services (CIS) via email. See Electronic liaison access. The email will have the summary line 'New Zealand Inbound Data Exchange Processing Summary'. Move confirmation emails to the appropriate folder. If there is no confirmation email following a NZ business day, it is likely the transfer has failed. Escalate to International Agreements for investigation. For information on: • **correcting CIC mismatches**, go to Step 3 • **processing NZ CICs**, go to Step 10

3	**Correcting CIC mismatches** + Read more …
	CICs that fail validation (mismatches) are sent to CIS via email for manual action. Mismatches mean that the data in the Australian or the NZ record is incorrect.
	Data must be corrected and aligned in both countries' records to make sure future CICs are included in the automated liaison system. Once the data is corrected and aligned, the information in the failed CIC must be confirmed and actioned as required:
	• Access the NZ CIC positional mailbox
	• Check the summary line of each mismatch email for the NZ Social Welfare Number (**SWN**)
	• In the Centrelink system, navigate to the s47E(d) screen and code: s47E(d)
	Was a match for the NZ SWN found?
	• **Yes**, go to Step 5
	• **No**, go to Step 4
4	**NZ Social Welfare Number (SWN) not found** + Read more …
	NZ SWN mismatches are caused by a transposition error in coding the NZ pension. Check the summary line of the email for the Customer Reference Number (CRN) provided by NZ and search for that record.
	Has the CRN advised by NZ been found?
	• **Yes:**
	o correct the SWN coded on the record as provided by NZ
	o go to Step 5 **Note:** the NZ pension may be undeclared, or the SWN may apply to another customer, for example, the partner. Care must be taken to make sure the correct customer is identified and both records updated
	• **No**, go to Step 9

5	**Verify CRN** + Read more …
	Compare the CRN provided by NZ in the summary line of the email with the CRN of the record that contains the NZ SWN.
	Does the CRN provided by NZ match the CRN of the Australian record?
	- **Yes**, go to Step 6
	- **No**, go to Step 7
6	**Confirm date of birth** + Read more …
	Contact NZ to compare the date of birth (DOB) recorded in both the Australia and NZ record.
	Does the DOB indicated by NZ match the DOB of the Australian record?
	- **Yes**, the validation has failed, and the CIC has matched incorrectly:
	o refer CRN to International Agreements
	o confirm the CIC information that was sent with NZ and action that information accordingly
	o go to Step 10
	- **No**, go to Step 8
7	**Date of birth mismatch** + Read more …
	Information on accessing and navigating the Department of Home Affairs database is available for staff in International Services through the International Services homepage. Resources contains a link to the homepage.
	Verify the customer's date of birth (DOB):
	- Access the Department of Home Affairs database
	- Find the Department of Home Affairs record for the customer
	- If no record can be found, contact the customer to confirm DOB with appropriate documentation
	- Compare the verified DOB with the DOB of the record that contains the NZ SWN
	Is the DOB on the Australian record correct?
	- **Yes**, go to Step 8
	- **No:**
	o See Verifying the date of birth or age of a customer or child
	o Once DOB is corrected, go to Step 8

8	**CRN mismatch** + Read more ...
	
	CRN mismatches are caused by either incorrect coding of:
	
	- CRN by NZ
	
	- NZ SWN by Australia. For example, partner's SWN may be recorded on the customer's record, **or**
	
	- NZ pension by Australia. For example, coded on wrong record
	
	Is the NZ pension or SWN coded incorrectly on the Australian record?
	
	- **Yes:**
	
	     ○ correct the coding
	
	     ○ once corrected, go to Step 9
	       Note: if the NZ pension is coded on the wrong record, care must be taken to make sure the correct customer is identified and both records updated
	
	- **No**, go to Step 9

9	**Contact NZ** + Read more ... The mismatch was caused by incorrect data in either the NZ or Australian record: - Contact NZ by phone, toll free number 1800 150 479 to coordinate correction of the data to make sure it is aligned in both countries' records - Once the data is aligned, confirm the CIC information that was sent and action accordingly - Go to Step 10
10	**Processing CICs** + Read more ... NZ Change in Circumstances (CICs) are assigned as Work Items in Customer First. CICs for one customer may contain multiple transactions for example a change of **address** may also result in a change of s47E(d) Automated processing will attempt to apply any s47E(d) or s47E(d) received directly to the customer record. If this fails, a s47E(d) work item will be generated for investigation and processing. **Note:** all non-rate CIC transactions will generate a s47E(d) work item.

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NZ legislation uses different rules for recording and verifying information, including different date of effect rules. All non-rate CICs can only be taken as an indication of a change in circumstances.

Customers should be contacted to confirm the change and obtain more information or verification as necessary in accordance with normal procedures.

Note: information received in CICs may simply be confirmation that the NZ authorities have updated their records in response to information previously sent by Australia and can be finalised with no further action. This does not apply to the following transactions:

s47E(d)

See CIC types and the action required.

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Consequential changes + Read more …

Depending on the CIC, there may be other changes in circumstances that may have occurred. For example, change of address or country of location may mean vacation of home property or change of income or other assets.

Changes may include:

- income and assets, see Coding income and assets for Centrelink payments and services

- vacation of home property (VHP), see Changing address (CLK)

- portability event, see Leaving Australia and portability of payments and Portability of payments paid under International Agreements

- relationship status, see Changing relationship status, dependent child or family details

- care requirements, see Change of care for Carer Payment (CP) and Carer Allowance (CA) customers

- nominee arrangements, see Reviewing nominee arrangements

- payment destination (absences from Australia of 12 months or more), see Delivery of payments to Centrelink customers outside Australia

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	Complete any necessary action and finalise the activity via the s47E(d) screen. Record details of all action taken on a **DOC**.

Processing an agreement liaison

Table 4

Step	Action
1	**Identifying liaison work** + Read more …
	Liaisons may consist of:
	• advice of foreign insurance periods for totalisation for an Australian pension claim under an international agreement
	• foreign pension notice of grant
	• foreign pension notice of rejection
	• verification of Australian periods of coverage, for example Australian working life residence (AWLR) or employment periods
	• a review work item that was set for a previous liaison
	If assistance is required with identifying liaisons contact the CIS VSSO Hub.
	Is the CIS Service Officer skilled in processing the liaison received?
	• **Yes**, and the liaison is:
	o an IT/AUS4 request for Australian employment periods from Italy, go to Step 4
	o an AUS/D6 request for confirmation of employment periods from Germany, go to Step 6
	o a review of a request for information from an agreement country, go to Step 2
	o any other liaison, go to Step 3
	• **No:**
	o re-categorise (if appropriate) and reassign the work
	o procedure ends here
2	**Reviews for requests for information from an agreement country** + Read more …
	Has the requested information been received?
	• **Yes**, go to Step 3
	• **No:**

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o Navigate to the s47E(d) screen

s47E(d)

o If this review is after the **first** liaison request: [create and send a second liaison request](#) adding a comment in the free text section of the AUS187 form that this is a second request in **Customer First**, [create a manual review](#) on the s47E(d) screen and complete the fields as follows:

s47E(d)

        Procedure ends here

o If this review is after a **second** liaison request: escalate by sending an email to [International Agreements](#) procedure ends here

In all instances, including escalations to International Agreements, if the liaison is requesting contributions for a new claim:

- Place the new claim on hold

- Annotate the claim progress **DOC** with the reason for liaison/escalation and expected response time

Note: escalating liaison requests to International Agreements does not guarantee a quicker response time. The escalation process is to relieve Service Delivery staff where the liaison process has broken down.

See [Agreement Liaisons Details (ALD)](#) for expected response times.

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Process liaison + Read more …

Care must be taken to determine the correct customer where the liaison involves members of a couple.

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	For example, where the liaison indicates a contributor but also includes a surviving partner claiming a widow pension, the customer in this case is likely to be the surviving partner, not the contributor. See Resources for sample **DOC**.
	
	If the liaison is scanned to the wrong record, move the liaison to the correct Customer Reference Number (CRN). See Moving, copying or updating Centrelink digital images.
	
	Process the received liaison or open **DOC**. If insufficient information has been provided in relation to:
	
	• Advice of foreign insurance periods for totalisation for an Australian pension claim under an international agreement, see Claims for Australian payments under International Agreement
	
	• Foreign pension notice of grant or rejection, see Foreign pension coding
	
	• Verification of Australian periods of coverage, for example Australian working life residence (AWLR), or employment periods during AWLR (for example, for the US). See Working Life Residence (WLR)
	
	Does a response need to be sent to the agreement country?
	
	• **Yes**, see Table 5 > Step 1
	
	• **No**, finalise and, if necessary:
	
	    o document all actions taken
	
	    o make sure all open relevant documents (**DOC** and scanned documents) and work items are closed
	
	    o procedure ends here

4	s22 (out of scope)

	s22 (out of scope)
5	s22 (out of scope)

	s22 (out of scope)
6	s22 (out of scope)

	s22 (out of scope)
7	s22 (out of scope)

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Creating an agreement liaison

Table 5

Step	Action

1	**Liaison to agreement country is required** + Read more ...
	
	Where:
	
	• an AUS187 liaison form to agreement country is required, go to Step 2
	
	• liaison to New Zealand is required, go to Step 2
	
	• email response is required, go to Step 4
	
	• Foreign Pension Claim box is ready to be sent for:
	
	  o Italy, go to Step 5
	
	  o New Zealand, go to Step 6

2	**A liaison form is needed** + Read more ... The s47E(d) screen serves 2 purposes. It is used to: • record the details of **all** liaisons that are sent (including phone calls), and • **generate** an AUS187 liaison form for all agreement countries **Note:** liaisons to New Zealand will either be the AUS187NZ or a liaison generated by s47E(d) , formerly s47E(d) The s47E(d) screen must be used for every liaison no matter the recipient or channel. See information about the AUS187 form and its fields. **Is the liaison being sent to New Zealand?** • **Yes**, go to Step 3 • **No**, go to Step 4
3	**Liaison to New Zealand (NZ)** + Read more ...

<table>
<tr><td></td><td>

Liaisons to NZ can either be an AUS187NZ or a liaison generated and sent through ^{s47E(d)} The AUS187NZ is used when we are sending physical paperwork to NZ, in all other cases, ^{s47E(d)} is used.

Is the liaison for a NZ foreign pension claim or other physical paperwork?

- **Yes**, AUS187 is required. Go to Step 4

- **No:**

    o   see How to use s47E(d)   on Resources

    o   record the details on ^{s47E(d)} screen and finalise, see Table 7 > Item 1

    o   procedure ends here

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<tr><td>4</td><td>

Generate and complete the AUS187 liaison form + Read more …

An AUS187 liaison form contains information about the customer and its purpose, that is, information required from the agreement partner or information from Services Australia.

Generating an AUS187 liaison form

Note:

- AUS187 liaison forms **cannot** be generated via ^{s47E(d)} screen on deceased records. See Forms for manual AUS187 liaison forms

- AUS187 liaison form must not be sent to Patronato

- Where a liaison is a request for information, a review is automatically set. If this does not occur, in **Customer First**, create a manual review on the s47E(d)   screen and complete the fields as follows:

    s47E(d)

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s47E(d)

For information on generating the liaison form screen, see Table 7 > Item 1.

For information on completing the liaison form, see Resources.

Note: use the free text section of the liaison form where necessary. For example, use for indicating a second or urgent liaison request or the reason action cannot be taken, for example, the customer failed to provide information.

Storing the electronic AUS187 liaison form

s47E(d)

- Upload the AUS187 to the customer's record as a **closed** work item - s47E(d)   . Upload any associated documents, for example, IT/AUS4

See Table 6 > Step 1.

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Email response is required + Read more …

When it is not appropriate to send in AUS187, but an email is possible, search for an appropriate template. See International Liaison email templates.

If a suitable template **exists**:

- copy the text from the template into a Word document and update/complete the information

If a suitable template **does not exist**:

- prepare a free text response and email it to the CIS Helpdesk with subject line 'AGP free text response required' advising the reason

- send the email, using the protective marking 'OFFICIAL: Sensitive'

- procedure ends here

The CIS Helpdesk will consider the free text request. If:

- **approved**, the CIS Helpdesk will respond to requesting Service Officer advising that it has been approved

- **declined**, the CIS Helpdesk will respond to requesting Service Officer with the reason the email request was declined. Requesting Service Officer will amend the email and resend to CIS Helpdesk for approval

Save the approved email text and any attachments to the local secure drive, see Table 7 > Item 1, as 'Outlook Message Format' (.msg).

Upload the approved response and any attachments to the customer's record.

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</table>

	Examples of when an email response may be appropriate include, but not limited to: • replying to a Patronato • insufficient customer details have been provided by the agreement country to find/create customer's record See Table 6 > Step 1.
6	s22 (out of scope)

	s22 (out of scope)	
7	**Social Welfare Number list to NZ (NZ SWN list)** + Read more ... s47E(d) See Table 6 > Step 6.	

Sending an electronic agreement liaison

Table 6

Step	Action
1	**Method of transmission** + Read more ... Check Agreement Liaison Details (ALD) screen for the agreed transmission method. Does the liaison form (together with any documentation/outgoing correspondence) need to be sent to the agreement partner electronically? • **Yes**, go to Step 2 • **No**, go to Step 7
2	**Transmitting electronic liaison to agreement partner** + Read more ... All staff are responsible for sending their own liaisons via the agreed transmission method. Liaisons must be saved in the secure PDF format, see Table 7 > Item 1, using the agreement country's naming conventions before electronically transmitting to the agreement partner by: • Email • s47E(d) • s47E(d) See Electronic liaison access on Resources page. If required to send: • a liaison electronically via email, go to Step 3 • a liaison electronically via s47E(d) see How to use s47E(d) on Resources and send the liaison: o create a **DOC** on each customer's record. Use Fast Note - s47E(d) o make sure a copy of the liaison is uploaded to the customer's record and then delete the copy from the local secure drive o if the agreement country also requires liaisons to be sent via post, go to Step 7 • a liaison electronically via s47E(d) see How to use s47E(d) on Resources and send the liaison: o make sure a copy of the liaison is uploaded to the customer's record and then delete the copy from the local secure drive • Italian Foreign Pension claim batch number listings, go to Step 5

	• New Zealand **Social Welfare Number list (NZ SWN list)**, go to Step 6
3	**Transmitting via email** + Read more …
	When sending to an Agreement partner or Patronato who has been approved for email use:
	s47E(d)
	• if the Agreement country also requires liaisons to be sent via post, go to Step 7
	Procedure ends here.
4	s22 (out of scope)

5	**Social Welfare Number list to NZ (NZ SWN list)** + Read more …
	s47E(d)
	Procedure ends here.
6	**Sending liaisons via post** + Read more …
	To send via the post:
	- print the AUS187 liaison form locally - attach all documentation that needs to be sent - place in the mail tray or allocated envelope (where applicable) - make sure the liaison has been uploaded to the customer's record - delete the copy of the liaison/correspondence from the local secure drive
	Procedure ends here.

Electronic file handling

Table 7

Item	Description
1	**Saving to the CIS secure drive** + Read more … s47E(d)

	s47E(d) In all cases: s47E(d)
2	**Zip liaisons and foreign pension documents** + Read more … A zip file is a single file containing one or more compressed documents, offering an ideal way to make large documents smaller and keep related documents together. For a zip file to be able to be successfully transmitted electronically, make sure that the file sizes are no more than: • ^{s47E(d)} - 99 MB To compress documents into one zip file: • holding [**Ctrl**], click on all individual documents (including the AUS187) to be included in one file • right click and select **WinZip** • select **Move/Add to WinZip** s47E(d) • save to the CIS secure drive Once transmitted, delete all the original individual electronic files and the zipped file from the CIS secure drive.

3	**Unzip documents received as zip file into individual documents** + Read more …
	
	Once the zip file is downloaded to the CIS secure drive:
	
	• double click to open the zip file
	
	• to extract files to the CIS secure drive, either:
	
	    o use the Winzip wizard by clicking on 'Yes, unzip the files to a folder I choose' option and selecting the CIS secure drive folder
	
	    o click on 'Unzip/Share' and then 'Unzip to My PC' from the '1-click Unzip' drop down menu and selecting the CIS secure drive folder

	Once all files have been uploaded to the customer record, delete all the original individual electronic files and the zipped file from the CIS secure drive.
4	**Split a PDF file into multiple files** + Read more … To split a PDF file into multiple files: • open the PDF file in **Adobe Acrobat** • click on **Tools** menu and select **Organize Pages** • select **Split** (scissors icon) from the **Organize Pages** menu • click on the **Split by** dropdown menu, select **File Size**, select the number and change to **9 Mb** • click on the blue **Split** button and select the CIS secure drive folder. The filenames will default to 'Part 1' etc. depending on how many files are created. s47E(d) Once files have been uploaded to the customer record or transmitted, delete all the original individual electronic files from the CIS secure drive.

5	**Merging PDF files** + Read more …
	
	 • Open Adobe Acrobat to combine files:
	     o open the **Tools** tab
	     o select **Combine files**
	
	 • Add files:
	     o select **Add Files**
	     o select the files to include in the PDF
	       Note: multiple PDFs or a mix of PDF documents and other files can be merged
	
	 • Arrange and delete content:
	     o click, drag, and drop to reorder files
	     o press [**Delete**] to remove any content not required

	• Combine files:
	
	    o when finished arranging, select **Combine Files**
	
	    o save as a PDF file:
	
	    o name the file and select the **Save** button

Coding the s47E(d) **screen**

Table 8

Item	Description
1	**Coding the** s47E(d) **screen** + Read more ... Navigate to s47E(d) screen. Code the following fields: s47E(d) The system will create a Universal Resource Locator (URL) link for the liaison at the top of the s47E(d) screen.

s47E(d)

Information about the customer and their partner (if they have one) will automatically populate into the form. Manually complete any further details required and delete any details that are not relevant. See information about the AUS187 form and its fields on Resources.

Note: text recorded in the s47E(d) fields will be used to generate an automatic Online Document Recording (ODR) **DOC**.

References

Policy

Social Security Guide 10.1.12.10 Exchange of Information

Legislation

Links to the Federal Register of Legislation site go to an 'All versions' page. Select the 'Latest' version.

Social Security (International Agreements) Act 1999

Social Security (Administration) Act 1999, section 208, Disclosure of information by the Secretary

Resources

Contact details

Centrelink International Services (CIS) - contact details for staff

International mailboxes

CIS Helpdesk

Residence and International program

Electronic access and how to guides

Note: do not print, save, or use copies of these files.

📄 Electronic liaison access

📄 How to use s47E(d)

How to use s47E(d)

How to use s47E(d)

How to scan paper document to local secure drive

Change in Circumstances (CIC) codes and procedures

Email templates

International Liaison email templates

Australian liaison form (AUS187)

All liaison forms follow this standard model. However, there are always points of difference. Features that do not apply to a particular country will not be presented.

In all cases the system will auto-populate as much data as possible in every section when the form is generated from the s47E(d) screen. The user can overtype anything in a section and can remove populated data by unchecking tick boxes.

The standard model caters for the most needs but cannot cover every scenario. If required, use the 'Other information' boxes to provide, or request, specific information.

AUS187 fields

Table 1

Section	Heading	Notes to users	Country Specific Variations
To:		System will read the s47E(d) from s47E(d) and populate AUS187 with the name and address from s47E(d) Make sure s47E(d) is correct **before** generating the liaison form. If generating an AUS187 manually, populate with the address of the liaison partner. Addresses can be found in s47E(d)	

1.Purpose			
Transmission of pension claim	Claim for X pension (attached) received in Australia on	Always code the date the foreign pension claim was first received by Services Australia.	
	For the purposes of Article X, claim for Australian pension was received on	This only applies to countries where 'claim for one = claim for other' provisions apply. Code the date the Australian pension was granted so the other country can backdate where appropriate.	This field is **not** applicable to Canada, Chile, Croatia, Cyprus, Estonia, Italy, Japan, Malta, Portugal, and Slovenia.
	Identity has been verified by Australia	Indicates we have confirmed identity/ies for agreement partner. Check the box/es where identity has been confirmed. Leave blank if this has not been possible and add notes in the **other information** free text field in Section 4.	
	Personal details have been verified by Australia	This part is to indicate the details that are contained in Sections 2/3 have been verified. **Note:** Services Australia can only certify from the customers' records if they have been verified as part of an Australian claim. If, for example, citizenship or legal marital status is required, this cannot be	

		done from the customers' records and needs to be verified by document provided by customer at claim. Leave blank if this has not been possible to verify and add notes in the **other information** free text field in Section 4.	
2. Personal Details	Australian Reference (CRN) Country reference No 1 Country reference No 2 Family Name(s) Given Name(s) Other name(s) known by Date of Birth Date of Death (if applicable) Address	This section contains details about the customer from whose record the liaison is being generated. Select the term that best fits: • **Applicant or Claimant** - When sending a claim • **Pensioner** - When the customer already receives a foreign pension The system will populate the customer's personal details: • **Name:** s47E(d) name recorded • **Other names:** s47E(d) first and then any other s47E(d) • **Ref 1/Ref 2:** from s47E(d) or, if blank, s47E(d) in Ref 1 • **Address:** all lines are populated	

		If generating an AUS187 manually, populate with name details from s47E(d) screen as appropriate.	
3. Personal Details	Australian Reference (CRN) Country reference No 1 Country reference No 2 Family Name(s) Given Name(s) Other name(s) known by Date of Birth Date of Death (if applicable) Address	This section contains details about any related person to the person named in Section 2. Select the term to be used: • **Partner** - if details of current partner are required • **Parent**, **Child** - for example, for survivor claims The system will populate the partner details where possible. If there is a deceased partner on the customer's record (s47E(d) screen) the system will populate with the deceased partner details: • **Name:** s47E(d) name recorded • **Other names:** s47E(d) first and then any other s47E(d) • **Ref 1/Ref 2:** from s47E(d) or, if blank, s47E(d) in Ref 1 • **Address:** all lines are populated If generating an AUS187 manually, or if the	

		partner details are required and fail to populate automatically, populate with partner's details as appropriate.	
4.Transmission of information by Australia			
Decision on Australian claim	Claim pending Claim rejected Claim granted	Complete where Australian claim status information is required by the agreement partner for person(s) named in Sections 2 or 3. Must be completed manually as appropriate. Indicate whether claim is pending, rejected, or granted. Claim rejections reasons available: • Age requirements not met • Residence requirements not met • Income and Assets too high • Medical requirements not met • Did not reply to correspondence • Other	
Current Australian payment details	Payment Type Gross 2 weekly rate (AUD$) From	Complete where current Australian pension rate information is required by the agreement partner	This item is not applicable for New Zealand because they can

		for person(s) named in Sections 2/3. The system will populate current rate details for current pensions only. - System will populate 2 Weekly Gross Rate, calculated from the current daily rate x14 from the ^{s47E(d)} screen - Date from, as the latest date of event for the daily rate If generating an AUS187 manually, populate with details from ^{s47E(d)} as appropriate.	obtain payment details via the ^{s47E(d)} For Italy, specific rate applies (excludes certain components).
Australian payment details (current and historical)	Payment type Payment starts date Payment end date Arrears paid Arrears start date Arrears end date Arrears amount (AUD$) Historical rates (per calendar year)	Complete where Australian historical rate information is required by the agreement partner for person(s) named in Sections 2/3. Information can be provided on up to 3 Australian payments per person. Historical rate details will be populated for current pension types only. System will populate: - Payment type - Payment starts date	This section is not applicable to New Zealand because they can obtain payment details via the ^{s47E(d)} For Italy, specific rate applies (excludes certain components).

		• Historical rates (per calendar year)
		
		For up to 10 calendar years
		
		If required, other details need to be manually completed:
		
		 • Arrears details:
		  o Arrears paid,
		  o Arrears start date,
		  o Arrears end date, and
		  o Arrears amount
		
		 • Historical rate details
		
		If generating an AUS187 manually, populate as appropriate.	

Australian Periods for the purposes of Article X	Found Not Found Australian periods	Complete where Australian 'insurance' periods are required by the agreement partner for totalisation purposes for person(s) named in Sections 2/3. System will populate with relevant periods where possible. The system will not populate Australian periods for deceased partner records, this will need to be entered manually if required.	This section is not applicable for Denmark, Finland, Netherlands, or Switzerland. This section will need to be manually filled for Korea, Japan and USA as these countries use employment periods.

		If generating an AUS187 manually, populate as appropriate. If Australian periods have not been verified, remove the details. **Do not send unverified periods to the agreement partner.**	For other countries, the system will use: • **AHR** - Historical Residence for Greece and Hungary • **WAR** - working age residence for New Zealand • **IND** - Indian Agr WLR for India • **WLR** - working life residence for all remaining countries
Medical Information		Check the box/es where medical information is being provided. This must be completed manually where appropriate.	
Other information		Free text section. Include any details not contained in the AUS187.	Additional information required by New Zealand (NZ) for liaisons with an NZ foreign pension claim

5. Request for information from X		These are all manually selectable sections with explanatory text included.	
6. Authorisation/Certification		The system will populate the user's name and date liaison is generated. If generating an AUS187 manually, populate as appropriate.	

Exchange of information

Table 2

Source	Information that can be provided
To the agreement country	• Decision on Australian claims • Australian rates of payments, **not** the income and asset information used to calculate the rate • Australian periods of coverage, for example, Australian working life residence (AWLR) • Executor details if they are on a deceased person's record **Note:** only executor details, **not** nominee details or other customers related to the deceased person • General contact details, including current nominees and last known addresses for non-current customers, or • Medical information on file, including arranging medical examinations and agreed reports
From the agreement country	• Decision on foreign pension claims • Foreign rates of payments, including historical rates • Foreign periods of coverage, for example, insurance/contribution details • Executor details • General contact details, including last known addresses for non-current customers, or • Medical information on file, including arranging medical examinations and agreed reports

Liaison classification codes

Classification coversheets for these codes are available on the Resources page in Scanning Centrelink documents using an MFD.

Table 3: this table outlines a list of international liaison classification codes.

Code	WLM Work Type	Information	When to use
s47E(d)	s47E(d)	Foreign Pension rate change (CPI)	Liaison indicating a change in the rate of an existing foreign pension
s47E(d)	s47E(d)	Advice of Death	Liaison indicating that a customer residing overseas has died
s47E(d)	s47E(d)	Medical Information	Liaison relating to a medical assessment for a foreign pension Store this type of liaison on the customer's MIFE
s47E(d)	s47E(d)	Notice of Grant of foreign pension	Liaison relating to the grant of a new foreign pension
s47E(d)	s47E(d)	Notice of Rejection of foreign pension	Liaison relating to the rejection of a claim for a foreign pension
s47E(d)	s47E(d)	Request to claim foreign pension	Liaison relating to a claim for a foreign pension
s47E(d)	s47E(d)	Request for Australian periods of coverage or advice of periods of coverage	Liaison requesting verification of Australian periods under an agreement (usually WLR) or insurance history from the agreement partner
s47E(d)	s47E(d)	Requesting or providing general information	Liaison with a request or providing other information, for example, customer's current address

Change in Circumstance (CIC) types and actions required

Table 4

Code	Description	Action

s47E(d)	• A change to the ongoing rate of New Zealand (NZ) pension
	
	Automatically applied where possible. Only included in Manual Follow-up (s47E(d) if other transactions exist or if automated update fails. **Result** field indicates whether automatic update was successful or manual coding is required
		• If rate is zero, there should be a s47E(d) CIC indicating the reason. See s47E(d) below
		
		• If there is an NZ pension already coded on s47E(d) **including an NZ Assumed Rate (**s47E(d)**)**, update the rate. See Foreign pension coding
		
		• If there is no NZ pension coded on s47E(d) and a Service Decision **has** been received, code the ongoing NZ rate from DLP + 1. Make sure to check s47E(d) coding, see Note below. See Foreign pension coding
		
		• If there is no NZ pension coded on s47E(d) and a Service Decision **has not been received**:
		
		    o Phone MSD and ask for the Service Decision to be sent
		
		    o While on the phone, ask MSD for the ongoing rate of payment
		
		    o Code the ongoing NZ rate from DLP + 1. See Foreign pension coding
		
		• After coding the NZ rate on s47E(d) and **finalising the activity**, check s47E(d) has automatically updated with s47E(d)
		    .' If the status on s47E(d) has not updated,

		manually code s47E(d) with s47E(d)
s47E(d)	• A change to rate of NZ pension due to cost-of-living increase • Received around 1 April each year. Automatically applied where possible Only included in s47E(d) if other transactions exists or if automated update fails. **Result** field indicates whether automatic update was successful or manual coding is required	If manual coding is required, update rate as normal. See Foreign pension coding. **Note:** code the rate notified within the CIC from the 1st of April.
s47E(d)	A change to rate of NZ pension for periods in the past	No action required.

s47E(d)	• A change to payment status
	• Valid values are:
	   ○ s47E(d) - Current
	   ○ s47E(d) - Suspended
	   ○ s47E(d) - Cancelled
	   ○ s47E(d) - Restored (MSD - Resumed)
	   ○ s47E(d) = Rejected (MSD - Declined)
	• A **Reason Code** for each status is also provided
		• Refer to CIC codes and actions to take for the various statuses
		• Changes of payment status for periods in the past should be considered in accordance with Australian date of effect rules
		
		Customer's requirement to claim a foreign pension must be reviewed. See Foreign pension coding.

s47E(d)	• A change of name
	• Valid values are:
	   ○ s47E(d) (Legal)
	   ○ s47E(d) (Also Known As)
	   ○ s47E(d) (Maiden)
	   ○ s47E(d) (Tribal)
	   ○ s47E(d) (Name at Birth)
		Add name to s47E(d) as an AKA as advised in CIC.

	○ s47E(d) (Preferred Name)	
s47E(d)	• A change of address • Valid values are: 　○ s47E(d) (Home address) 　○ s47E(d) (Postal address) 　**Note:** for s47E(d) customer must be contacted to determine if they also want their Australian mail to be sent to the new address 　○ s47E(d) (Temporary address)	Inside AUS - disregard CIC, the customer is obligated to advise. Outside AUS - update as advised if the customer is a homeowner issue a XOB140. Create s47E(d) [Fast Note](#) and put on hold for 35 days. Once the **DOC** comes off hold it will be allocated to s47E(d) for appropriate action.
s47E(d)	• A change of relationship status • Valid values are: 　○ s47E(d) (Single) 　○ s47E(d) (Separated) 　○ s47E(d) (Divorced) 　○ s47E(d) (Widowed) 　○ s47E(d) (Unknown) 　○ s47E(d) (Not Required) 　○ s47E(d) (Defacto) 　○ s47E(d) (Married)	See [Changing relationship status, dependent child or family details](#). **Note:** NZ recognise same sex relationships as civil unions or legal marriage. Depending on the customer's location and circumstance, a specific form is required to be issued: • Inside Aus: Mod P (Partnered) or Mod S (Separated) • Outside Aus: AUS174 (Partnered) or AUS184 (Separated) Run the s47E(d) **Fast Note** detailing what form was issued, put on hold for 35 days for outside Aus, 21 days for inside Aus. Once the **DOC** comes off hold it will be allocated to s47E(d) for appropriate action.
s47E(d)	A change of bank account	See [Changing payment destination](#).

		Do **not** update with details provided in the CIC, the customer is obligated to contact directly. **Note:** SBO account is advised of via liquid office not CIC.
s47E(d)	• A change to the country of location • It Includes the s47E(d) field which specifies whether NZ have: s47E(d) the coding of that country in their records.	These CICs are advising of historical residence only, however confirmation is required to ensure the most recent residence is required to be updated. For example, a CIC is advising of the customer travelling to a third country, and the customer's record does not reflect this, phone **WINZ** to ensure the correct location is recorded on s47E(d) and or s47E(d) depending on customer's intentions.
s47E(d)	• A change to third country pension. That is, a pension from a country other than Australia or New Zealand • It includes s47E(d) field which specifies whether NZ have: s47E(d) the coding of that foreign pension in their records	If the third country pension is not coded on s47E(d) phone **WINZ** and confirm details. Code details of third country pension on s47E(d)
s47E(d)	An advice of death	Phone **WINZ** to confirm customer and the date of death. Run the s47E(d) **Fast Note** with confirmation of death provided by WINZ.
s47E(d)	An advice of executor of deceased estate	No action required.

s47E(d)	• A change in care of child It includes the s47E(d) field which specifies whether NZ have s47E(d) a new child or s47E(d) an existing child	See Changing relationship status, dependent child or family details. Is the customer receiving DSP? • **Yes**, phone **WINZ** to confirm details of dependent, code information provided onto the record • **No**, no further action is required
s47E(d)	New Zealand Income: there may be advice of employment income, NZ supplements added to NZ payment and/or third country payment	Phone **WINZ** to confirm details of income assessed and send an **RFI** for appropriate follow up if required, for example, payslips, income, and asset follow up.
s47E(d)	An advice of accrual of 10 years historical residence in New Zealand (NZ)	• Check historical residence for discrepancy. Due to differences in definitions of residence, there may be no further action required **Note:** • Once customer has accrued 10 years historical residence in NZ, as recorded on Services Australia's system, the Australian rate will change
s47E(d)	A change of Australian legal resident status sent to NZ	• Not applicable. Advice sent from Australia for NZ purposes **Note:** • This CIC is necessary to advise the NZ authorities when a customer who is not a permanent resident, according to the definition in the agreement with New Zealand, is granted a permanent visa in Australia This changes the rate calculation under the agreement for both countries.

Insufficient information provided by the agreement partner

Table 5

Reason	Description
Record exists with unconfirmed current address	Send a liaison to the agreement partner advising we need more information before we can respond to their request.
No record exists and sufficient customer details provided	Add the customer to the system and send them the appropriate form, for example AUS027.
No record exists and insufficient customer details provided	Send a liaison to the agreement partner advising we need more information before we can respond to their request.

Foreign Liaison Type codes

Table 6

Requested by	Code	Description
Foreign Country	s47E(d)	Australian Working Life Residence query
Foreign Country	s47E(d)	Australian Medical information requested
Foreign Country	s47E(d)	Life certificate
Foreign Country	s47E(d)	Australian Pension Details Requested
Foreign Country	s47E(d)	Miscellaneous query to Australia
Australia	s47E(d)	Foreign Country Residence/Contributions query
Australia	s47E(d)	Foreign Country Medical information requested
Australia	s47E(d)	Foreign Country Pension Details requested

Australia	s47E(d)	Miscellaneous query to foreign country
Australia	s47E(d)	Embargo details requested

Intranet links

[International Services](#)

[Security Markings](#)

s22 (out of scope)

New Zealand Agreement and foreign pension information 106-04024000

Currently published version valid from 30/06/2025 8:18 PM

Background

s22 (out of scope)

This document outlines information about the Agreement including the process of making a claim for Australian payment under the Agreement and coding of New Zealand payments.

Start date

Social Security agreements with New Zealand (NZ) started in the 1940s. The latest version was implemented on 1 July 2017.

Claiming and benefits covered

The New Zealand Agreement generally allows customers to lodge a claim for payment from either country. It also allows customers to add together periods of residence in Australia and periods of social security coverage in New Zealand, to meet the minimum requirements for payment.

Australian payments covered:

- Age Pension (AGE)

- Disability Support Pension (DSP)

- Carer Payment (CP)

Note:

- DSP only applies severely disabled customers who were:

    o resident in either Australia or New Zealand on the date they became severely disabled, **and**

    o resident in the other country for at least 12 months before the date of severe disablement

- Carer payment is limited to carer partner of DSP customers only

Customers can claim Australian payments under the Agreement by contacting Services Australia or the New Zealand authorities.

New Zealand payments covered:

- New Zealand Superannuation (equivalent of Age Pension)

- Supported Living Payment (formerly Invalids Benefit)

- Veterans Pension

Customers can claim a foreign pension by contacting Services Australia or the New Zealand authorities.

Information on International Agreements

Information on how International Agreements work and general concepts used in agreements is contained in International Social Security Agreements.

The Resources page contains links to the:

- Residence and International program

- Centrelink International Services (CIS) and

- Services Australia website

Related links

International Social Security Agreements

Claims for Australian payments under International Agreements

Foreign pension claims

Foreign pension coding

Agreement liaisons, NZ CICs and exchange of information

Comparable Foreign Payment (CFP) lump sum arrears debts

Australian Residence Rules for New Zealand citizens

New Zealand Agreement debt recovery requests - action for International Services (CIS)

New Zealand Agreement debt recovery reconciliation - action for International Services (CIS)

Deciding if a customer is residing in Australia

Process

This page contains further information in relation to the Agreement with New Zealand, including Australian payments and New Zealand payments.

General information

Social Security Agreement between Australia and New Zealand

Category title	Description
New Zealand Social Security System	**New Zealand Social Security System** + Read more … In New Zealand, social security is similar to Australia in that entitlement to payments is based on residence in New Zealand. Like Australia, New Zealand also has private pension superannuation-like schemes through deductions from paid employment. However, New Zealand Superannuation is the equivalent of Australian Age Pension and not to be confused with superannuation-like payments in Australia. New Zealand Superannuation is not income tested in New Zealand. New Zealand has a general direct deduction policy for any pensions from other countries, including from Australia. New Zealand's social security agreements with other countries may modify this in some circumstances. New Zealand therefore has similar provisions to Australia requiring a person to claim any entitlement to a pension from another country. This direct deduction policy is reflected in the Agreement and means that Australia will direct deduct pensions from third countries in some circumstances. See Rate calculation. New Zealand has a general portability scheme based on residence. Special arrangements apply for some Pacific Island countries and provisions of New Zealand's social security agreements still apply. Like the Department of Veterans' Affairs (DVA) in Australia, Veterans' Affairs New Zealand (VANZ) also pay pensions to people who have served in the military. New Zealand Veterans' Pension can be paid instead of New Zealand Superannuation but is not a VANZ payment and not to be confused with other payments such as War Disablement Pension paid by VANZ. See Assessment and exempt payments and Other known payments.
History and previous Agreements	**Widow B Pension, Wife Pension and Bereavement Allowance** + Read more … Widow B Pension and Wife Pension were sunsetted in 1995 and, along with Bereavement Allowance, ceased to be paid from 2020. See: • Widow B Pension • Wife Pension, and • Bereavement Allowance **Original Agreement - 1944** + Read more … Agreements with New Zealand have been in place since the 1940s and have been revised and amended many times.

Full revision - 1 January 1995 + Read more …

This version of the Agreement was host country style, meaning that only the country in which the person was resident paid the person's pension, which precluded entitlement to a pension from the other country.

Generally, a person could use a period of residence in one country exclusively to meet the requirement for payment in the other country, for example, 10 years residence in New Zealand was used to meet the qualifying residence requirement for Age Pension in Australia.

The 1995 Agreement covered:

- Age Pension

- Disability Support Pension (DSP)

- Widow B Pension

- Sole Parent Pension - is now Parenting Payment Single (PPS)

- Wife Pension

- Partner Allowance

- Parenting Allowance - now Parenting Payment Partnered (PPP)

- Additional Family Payments

Note:

- Also covered unemployment benefits until removed by protocol in October 2000. Carer Payment was also subject to the Agreement through the partner related provisions (Article 6.1)

- There was no requirement for DSP customers to be severely disabled

- Partner Allowance and PPP were only payable to the female partner of an Age Pension or DSP recipient

As a host country agreement, reimbursement provisions applied under the 1995 Agreement. In an annual reconciliation process, each country would reimburse the other for its customers living in the other country based on the customer's residence. Due to most customers living in Australia, the result was always an amount paid by New Zealand to Australia.

In recognition of these provisions in the 1995 agreement and existing customers, reimbursement was projected and agreed amounts scheduled in the transitional provisions of the 2002 Agreement (Article 26).

Provisions under the 1995 Agreement that continue to apply + Read more ...

Payments granted under the 1995 Agreement **continue to be subject** to the provisions of that Agreement but may transfer to the current version of the Agreement if they meet the necessary requirements. A person may not transfer back to the 1995 Agreement.

As a host-country agreement, payment would be cancelled if the person departed permanently. Portability was limited to temporary absences only:

- Age Pension - 26 weeks

- DSP, Wife Pension, Widow B Pension, PPS - 4 weeks

- Partner Allowance, PPP - same as partner

Note: Carer Payment deemed to be paid under the Agreement was not portable outside Australia (s11 Social Security (International Agreements) Act 1999).

Any foreign pension from a third country received by a person paid under the 1995 Agreement is treated as a direct deduction in all cases. Each member of a couple is taken to receive half the total amount of foreign pension received by both the customer and their partner.

Any NZ pension received by a person paid under the 1995 agreement or that person's partner is not assessed. In some cases, a person who is paid under the 1995 Agreement whose partner receives a NZ pension may be better off by staying under the 1995 Agreement even if it means a period of non-payment, e.g. for portability.

Full revision - 1 July 2002 + Read more ...

This version of the Agreement was shared responsibility in nature, meaning that the responsibility for supporting mutual customers was shared between the signatory countries.

The 2002 Agreement covered:

- Age Pension

- Disability Support Pension (DSP) for the severely disabled, and

- Carer Payment for carer partners of DSP customers

Lodgement

The 2002 Agreement allowed a NZ citizen residing in Australia as a temporary visa holder (for example non-protected SCV holder) to be regarded as an Australian resident. This enabled customers affected by the Australian Residence Rules for New Zealand citizens to claim payments covered by the Agreement.

Qualification

It also allowed customers to totalise to meet any necessary qualifying residence period using Australian historical residence and NZ Working Age Residence. See Residence and Working Age Residence (WAR)

Note: from 1 November 2012, following a Federal Court decision, DSP customers ceased having to meet the 10-year qualifying residence rule if their Continuing Inability to Work (CITW) occurred when they were residing in Australia (including as an SCV holder who is not protected). If the CITW occurred when the customer was a resident of NZ, the 10-year qualifying residence period still had to be met. **However,** this could be met by totalising Australian historical residence periods (including those as an SCV holder who is not protected) with New Zealand **historical** residence. This decision was not incorporated into the 2017 Agreement revision.

Rate

The main difference from the 2017 Agreement is that customers affected by the 2002 Agreement were paid the NZ proportional rate based on their Working Age Residence if they were long-term outside Australia and present in New Zealand. The direct deduction rate was paid inside Australia unless they were paid the NZ proportional rate and were not long term inside Australia.

This led to anomalies where a customer would 'pass-through' either Australia or New Zealand and become affected by the Agreement and uncertainty as to the application of the rules when the customer went to a third country from Australia.

For example:

- The NZ proportional rate would apply to a person if they went to NZ for just one day and continue for 26 weeks on departure and then revert to the ordinary rate payable, if any

- A person on a direct deduction rate who left Australia would remain on the direct deduction rate indefinitely in some cases

- A person with NZ pension who was living in a 3rd country would immediately become affected by the direct deduction rate for any return to Australia regardless of the duration of the return

Other differences between the 2002 and 2017 rates were:

- Assessment of NZ benefits:

    o Under the 2002 Agreement most payments from New Zealand were ignored in all situations

- Assessment of 3rd country pensions:

	o Under the 2002 Agreement most 3rd country pensions were directly deducted
	See Rate calculation.
	Portability
	Portability under the 2002 Agreement for travel between Australia and New Zealand was indefinite.
	Portability under the 2002 Agreement for travel to 3rd countries was for a maximum of 26 weeks, regardless the intended duration of the absence. That is for both permanent and temporary departures, portability was 26 weeks.
	Provisions of the 2002 Agreement that continue to apply + Read more ...
	Customers paid under the 2002 Agreement were transferred to the 2017 Agreement from 1 July 2017. While a person could not lose qualification for payment, any rate change due to the change in calculation methods was applied immediately.
	Unless they lost qualification for any other reason, customers absent from Australia on 1 July 2017 were able to continue to receive their payment until the end of the portability period under the 2002 Agreement (26 weeks) or their return to Australia or New Zealand, whichever occurs first. Any subsequent departure on or after 1 July 2017 will be assessed under the 2017 rules. See Portability.
Effect of NZ Agreement on autonomous and other agreements	**Rate Calculation** + Read more ...
	The provisions of an agreement normally only apply to payments made under that agreement with some beneficial provisions also applying to autonomous customers.
	The rate calculations under the NZ Agreement will apply to **any** customer who receives a NZ pension or any Age Pension, Disability Support Pension (DSP) or Carer Payment (CP) who is long-term in New Zealand.
	This means that an autonomous customer may become 'affected' by the NZ Agreement in various situations and then may subsequently become free of the effect after a period of time because of a further change in circumstances. See Rate calculation.
	Concession Cards + Read more ...
	Because of the Australian residence rules for New Zealand citizens there are provisions in the social security law that allow a customer who is paid under the Agreement to receive a Pensioner Concession Card.

	Where the customer is a special category visa holder (SCV) who is not protected, there is an additional income test for concessions cards that is performed after the NZ Agreement rate calculation that determines the rate of the customer's income support payment. See: - Qualification/Totalisation - Rate calculation - Pensioner Concession Card (PCC) **Assumed Rate** + Read more … Under the Agreement, the rate of Australian pension may also affect the rate of NZ pension. In some cases, the rate of a third country pension affects the rate of both the Australian and NZ pension simultaneously. Because of the process and delays involved between the 2 countries, this may involve a series of negative and positive adjustments, which ultimately affects customers. To avoid this, using an Assumed Rate of NZ pension may be required when processing an Australian new claim or at the same time as the coding of the third country pension. **Foreign Pension System** + Read more … Like Australia, New Zealand applies a policy of requiring a customer to claim any 'comparable foreign payment' to which they are entitled. This only applies to customers in New Zealand so normal Foreign Pension System (FPS) processing is deferred by 6 months to allow New Zealand to require the customer to make a claim. There is no deferral for customers in Australia. See Foreign Pension System (FPS) statuses and reviews.
NZ Agreement specific terms	**AU Actual Rate** + Read more … This is the rate that is actually paid after considering any direct deduction or exemption of NZ pension. In Australia, this is the rate that is paid after the NZ direct deduction is applied. In New Zealand, NZ pensions are exempt so this is the same as the Australian Notional Rate. This rate is used by New Zealand as a direct deduction for customers who are present long-term in New Zealand. **AU Notional Rate** + Read more … This is the rate that would be paid if not for the NZ pension direct deduction.

- in Australia, this is the rate that would have been paid before the NZ direct deduction is applied

- in New Zealand, NZ pensions are exempt so this is the same as the Australian Actual Rate

This rate is used by New Zealand to limit (cap) the proportional rate of NZ pension paid in Australia (Article 9.3 and Article 10.2) and is manually advised to New Zealand at grant of Australian pension and thereafter when a change occurs through the automatic liaison process. See Agreement liaisons, NZ CICs and exchange of information.

Note: where Centrelink International Services (CIS) rejects a new claim for Australian pension due to lack of NZ working age residence (NZWAR) to totalise and the person is in receipt of a NZ pension and has at least 12 months NZWAR, it has been agreed to provide a deemed Australian Notional Rate on the liaison (Service Decision) to New Zealand as they may then still pay a proportional rate into Australia. See Agreement liaisons, NZ CICs and exchange of information.

This deemed Notional Rate is based solely on information declared on the form, even if unverified or not provided, and is calculated in the new claim activity by:

- 'dummying' the residence coding to qualify

- coding the income and assets declared on the claim (even if unverified or not provided)

- taking the activity to the s47E(d) screen **without finalising**

- noting the Australian Notional Rate determined on the s47E(d) screen

- correcting the residence information and removing any unverified income and assets before finalising the new claim activity correctly rejecting the claim

Capping + Read more ...

Capping refers to the limitation of the proportional rate of NZ pension in Australia to no more that the Australian Notional Rate (Article 9.3 and Article 10.2).

Current Zero Rate (CZR) + Read more ...

Where the customer has an Australian Notional Rate greater than zero but an Actual Rate of zero because of the NZ pension direct deduction (including pensions from third countries in some cases), the customer remains current for all other purposes, e.g. concession cards,

Residential Care Assessments (RCA) This is referred to as Current Zero Rate (CZR).

CZR Override + Read more …

Where a customer is CZR and the Australian Notional Rate increases, for example when the Australian CPI is applied in March and September, a small rate may become payable.

However, as New Zealand will increase their proportional rate based on the increase in the Australian Notional Rate, system processing compares the increased Australian Notional Rate to the NZ Notional Rate. If the increased Australian Notional Rate remains less than the NZ Notional Rate, system processing forces the CZR to remain in place. This is referred to as the CZR Override and displays on the s47E(d) screen as s47E(d)

The CZR Override rules for partnered cases are:

- if both members of a couple have the same Australian Notional Rate, and

- both customers' NZ Notional Rate is higher than the Australian Notional Rate

s47E(d)

Date of Severe Disablement (DoSD) + Read more …

Not to be confused with the **date the customer became severely disabled** (see below), the Agreement defines the Date of Severe Disablement (Article 1.1(e)) as either:

- the date first assessed under the Agreement, or

- an earlier date if agreed between Australia and New Zealand

The DoSD is recorded in the s47E(d) field on the s47E(d) screen and is used by the system to:

- see if the customer became severely disabled in Australia or New Zealand (Article 2.2(b))

- see if the customer has 12 months residence in 'the territory of the other Party' (Article 2.2(c)), and, where appropriate

- mark the end date of a customers' period of Working Age Residence

If the customer was residing in AU or NZ on the date, they became severely disabled, DoSD is the date from which the customer's

payments commence under, or they become impacted by, the Agreement.

If the customer was residing in a 3rd country on the date, they became severely disabled, DoSD is the **date the customer became severely disabled** (see below).

Note:

- The DoSD is required for **all** DSP customers who are present long-term in NZ (and who therefore receive a proportional rate)

- The DoSD should normally only be set once and used for all future purposes unless the customer goes off payment and is subsequently assessed and found to be severely disabled for a **different** condition or claim

Date the customer became severely disabled + Read more ...

This is the literal date the customer became severely disabled, for example, at birth, from date of accident, etc., and is used to determine whether the customer meets Article 2.2 of the Agreement.

If the customer was residing in AU or NZ on the literal date the customer became severely disabled, they may meet the Scope of the Agreement, in which case the Date of Severe Disablement (DoSD - see above) is set to the date of grant/transfer/departure.

If the customer became severely disabled while residing in a third country, the customer fails the legislative scope of the Agreement and cannot use the Agreement to claim Disability Support Pension (DSP) (Article 2.2(b)). In this case the Date of Severe Disablement (DoSD - see above) is set to the literal date.

NZ Actual Rate + Read more ...

This is the rate of NZ pension that is actually paid to the person after the consideration of the capping in Australia or the direct deduction of Australian pension in New Zealand.

NZ Assumed Rate (ASR) + Read more ...

Customers are generally paid NZS for up to 26 weeks after leaving NZ. To continue being paid, they will need to lodge a 'portable' claim, noting the AU claim = FP claim principle applies. See Lodgement rules and start day.

The 'portable' rate of NZS will be lower than the 'domestic' rate of NZS. If Services Australia continue to maintain the 'domestic' rate of NZS, the customer will be adversely affected as it can take some time for NZ to determine the correct rate of 'portable' NZS to apply and Services

Australia are unable to pay the customer arrears to account for the difference.

The NZ Assumed Rate (ASR) is a calculation of what proportional rate of NZ pension can be paid in Australia. It is used to adjust the Australian rate, in recognition of the fact that the rate of NZ pension will reduce, ensuring the customer receives their full social security entitlement. The ASR must be coded in a new claim if the customer is in Australia and receiving NZS. This is to ensure the arrears issued from the new claim are calculated using the portable rate of NZS.

The ASR is also used where a non-protected special category visa (SCV) holder who is paid a direct deduction rate of Australian pension is granted a third country pension.

That is in recognition of the fact that the rate of NZ pension that is being paid will reduce because of the grant of the third country pension.

Using the ASR offsets any problems with arrears debt calculations or a requirement to make negative adjustments and then positive adjustments of the same value.

The NZ Assumed Rate Calculator is available to Centrelink International Services (CIS) staff through the Residence and International program homepage. See the Resources page for a link.

Note: the Assumed Rate needs to be updated in line with the NZ CPI. The NZ CPI occurs on 1 April each year.

NZ Notional Rate + Read more ...

This is the theoretical maximum rate of NZ pension that could be paid before capping is applied. It is determined by the information provided by New Zealand, i.e. the rate of NZ pension that is compared to the Australian Notional Rate and is manually coded with the NZ Actual Rate when a NZ pension is granted.

The NZ Notional Rate is used in Current Zero Rate (CZR) processing to avoid paying small rates of Australian pension in the time between increases in the Australian Notional Rate and when New Zealand authorities update the NZ Actual Rate.

This term is only used by Australia and so is not included in the automatic liaison process.

Pension age + Read more ...

Pension age is defined in the Agreement (Article 1.1(j)) as the qualifying age for Australian age pension or New Zealand Superannuation, whichever is the higher.

It is used to determine the minimum qualifying age for both Australian age pension and New Zealand Superannuation (NZS), and the

corresponding upper age for Australian Disability Support Pension (DSP) and New Zealand Supported Living Payment (NZI) where the Agreement is required for lodgement or qualification.

For example, an NZS claimant present long-term in Australia requires the Agreement for lodgement and therefore needs to be the higher age.

Present long-term + Read more ...

'Present long-term' is defined in the Agreement (Article 1.1(l)). A person is considered present long-term in a country if they:

- move permanently, or

- travel temporarily with the intention to remain for more than 12 months, or

- have been physically present for continuous period of 26 weeks

This is based on the New Zealand policy of accepting a person as ordinarily resident in New Zealand.

The country of long term presence on the s47E(d) field on the s47E(d) screen is used to determine the base rate calculation to apply. See Rate calculation.

System rules exist which automatically determine the present long-term country based on combination of confirmed movement data from the s47E(d) and s47E(d) screens and residence data from the s47E(d) screen:

- The s47E(d) field on the s47E(d) screen will be set to the country of residence (s47E(d)) where a move is permanent. That is, the country of residence matched the confirmed country of location from s47E(d)

- Where a customer is travelling temporarily, that is the country of residence (s47E(d)) and the country of presence (s47E(d)) do not align, the system will set a review to mature 26 weeks after departure. On maturation of the review, the system will update the s47E(d) field on the s47E(d) screen to the country of presence if the customer has remained continuously in that country for the entire 26 weeks. If the customer has not remained present in that country, the review is cancelled with no update

Note: there is no mechanism for recording a customer's intent in relation to travel. Where a customer is travelling temporarily but intends to remain in the other country for a period exceeding 12 months, the s47E(d) field on the s47E(d) screen will

need to be manually updated. This can only be done by an authorised staff member in International Services.

Social Welfare Number (SWN) + Read more …

The SWN is the New Zealand client/ reference number. It is 9 digits long. The correct format is nnnnnnnnn.

Take care when coding SWNs to ensure the automated liaison process occurs correctly. See Agreement liaisons, NZ CICs and exchange of information.

Note: Work and Income New Zealand (WINZ) may ask staff to update customer records with a SWN so they can access the s47E(d) ^{s47E(d)} also as known as the portal).

Staff must not create a record on the s47E(d) screen just to record a NZ reference number (SWN).

Only record a SWN on the ^{s47E(d)} screen:

- where an ^{s47E(d)} record exists

- to key an s47E(d) , or

- to process a NZ Service Decision

In all other cases, on the s47E(d) screen, code the SWN in the s47E(d) field.

Special Banking Option (SBO)/Direct Payment Method (DPM) + Read more …

There are 2 banking options available to customers present long-term in NZ:

- Special Banking Option (SBO), which is an account in the customer's name but is managed by the NZ authorities, or

- Direct Payment Method (DPM), which is an ordinary bank account in the customer's name

SBO may be used due to New Zealand's general policy of direct deduction of pensions from other countries. Payments from other countries, including Australia, are deposited into the SBO account and the NZ authorities pay the person a full rate of NZ pension into a separate account owned by the customer. The NZ authorities retain the amounts deposited into the SBO account, offsetting their outlays, and avoiding the need for NZ to work out how much 'top up' they need to pay the customer each pay.

Any queries about setting up, or issues with, SBO accounts should be referred to the NZ foreign pension authorities.

Note:

- SBO may be managed by the NZ authorities, but Services Australia treats SBO as a normal bank account provided by the customer

- SBO has a BSB of s47E(d) and resolves to s47E(d) when coded on the s47E(d) screen

- Older SBO accounts have a BSB of s47E(d) If new SBO bank account details are provided to Services Australia with the older BSB, for example via a new claim or **AUS178**:

  - o confirm the correct BSB with the NZ foreign pension authority before coding s47E(d)

  - o it is very unlikely that a new SBO account will have the older SBO BSB

SBO cannot be used in all circumstances. If any of the following apply, DPM **must** be used instead:

- If a customer does not want to be paid into SBO

- If the total amount rate of 'foreign' pensions received, including Australian pension, is higher than the maximum NZ rate, or

- If a customer has an existing Australian debt, or debt shell, when they are assessed as being present long-term in New Zealand

Note:

- Where a customer who is paid into SBO incurs an Australian debt that would normally be recovered by withholdings, it may be possible for the NZ authorities to return amounts through the Arrears Debts Schedules. This is only possible where the customer was paid into SBO for the **entire** debt period. See New Zealand Agreement debt recovery requests - action for International Services (CIS)

- Arrears generated by an Australian claim grant **must not** be released to a customer who is paid via DPM. Arrears must be embargoed within the new claim on the s47E(d) screen. See Claims for Australian payments under International Agreements.

Information for International Services (CIS) is available through the Centrelink International Services (CIS) homepage. See the Resources page for a link.

Special Category Visa (SCV) + Read more ...

	A special category visa (SCV) is generally automatically issued to a person who enters Australia using a NZ passport. For the purposes of the social security law, SCV holders are either 'protected' or not.
	SCV holders who are not protected can only receive either:
	• a payment covered by the Agreement, or
	• a special once-only payment of up to 26 weeks of specific payments. For further information, see Australian Residence Rules for New Zealand citizens
	Note: various temporary visas may allow a person to remain in Australia, but only periods where the person is or was the holder of a Special Category Visa (subclass 444) are deemed to be Australian residence under the Agreement.
	Third Country Pension (3CP) + Read more …
	This is defined in the Agreement (Article 1.1(r)) as any 'comparable foreign pension' for Australia or 'an overseas pension' for New Zealand.
	• For New Zealand, 3CPs are either a direct deduction (according to their domestic legislation) or exempt (Agreement)
	• For Australia, 3CP can be a direct deduction or ordinary income. See Rate calculation
	Working Age Residence (WAR) + Read more …
	Instead of periods of Working Life Residence (WLR), the Agreement with New Zealand uses periods of Working Age Residence (WAR).
	WAR is defined (Article 5.5) as a period of residence in either country starting from 20 years of age and ceasing when the customer turns pension age.
	Note: for disability pensions, WAR ceases to accumulate at the Date of Severe Disablement (see above).
	• Australian working age residence is known as AWAR
	• New Zealand working age residence is known as NZWAR
Residence	A summary of residence periods under the Agreement is available on the s47E(d) screen.
	Australian resident + Read more …
	The Agreement allows NZ citizens who do not hold a permanent visa but are lawfully residing in Australia to be taken to be an Australian resident for the purposes of the Agreement only (Article 5.1).
	This means that Special Category visa (SCV) holders who are not 'protected' can make a claim under the Agreement and can count

	periods residing in Australia while not 'protected' as periods of Australian residence. See Australian Residence Rules for New Zealand citizens. This also means that an SCV holder who is not 'protected' and who was residing in Australia at the date they first met the continuing inability to work (CITW) criteria does not need to meet the qualifying residence period for Disability Support Pension (DSP), i.e. does not need to totalise. See Qualification/Totalisation. For Australian pension purposes under the Agreement only, a person may be accepted as an Australian resident if they have been present in Australia for 26 weeks or intend to remain for 12 months or more that is, they are present long-term in Australia. See New Zealand resident below. **New Zealand resident** + Read more … New Zealand will generally accept a person as 'ordinarily resident' in New Zealand if the person has been present in New Zealand for at least 26 weeks or intends to remain for 12 months or more. For this reason, policy advice is that, for Australian pension purposes under the Agreement only, a person may be accepted as a New Zealand resident if they meet the criteria above. The Agreement excludes periods of residence in New Zealand if, at the time, the person was unlawfully in New Zealand or held a: - visitor's permit - temporary work permit, or - student permit **Note:** on request, the NZ authorities may be able to confirm visas and permits held. Under the Agreement, the territory of New Zealand excludes: - Cook Islands - Niue, and - Tokelau British citizens who arrived in New Zealand before 2 April 1974 were allowed to reside in New Zealand without a visa or a permit. As such, they are covered by the agreement.
Authorities, Institutions and Liaison Agencies	Contact details for foreign pension authorities are available in the s47E(d) facility. **Competent authorities** + Read more …

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For Australia:

Department of Social Services (DSS)

Note: New Zealand authorities maintain the toll free number 1800 150 479 for customers in Australia to contact them directly.

For New Zealand:

Ministry of Social Development (MSD)

Competent institutions + Read more …

For Australia:

Services Australia

For New Zealand:

Ministry of Social Development (MSD)

Note: the service delivery arm of MSD is called Work and Income (also known as WINZ).

Liaison agencies + Read more …

For Australia:

Centrelink International Services (CIS)

For New Zealand:

International Services within MSD

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Exchange of information and liaison forms

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See Agreement Country Document Catalogue (ACDC) for samples of forms, foreign documents and translations.

Exchange of information + Read more …

Under the Agreement with New Zealand, information held about customers may be exchanged between the liaison agencies to determine entitlement to payments under the Agreement and under either country's domestic legislation (Article 18.3).

Note: family assistance is outside the scope of the Agreement for both the exchange of information and recovery of debts.

An automated liaison process applies with New Zealand. Certain types of changes in circumstances (CICs) for mutual Australian and New Zealand pensioners are extracted and sent between the countries daily. See Agreement liaisons, NZ CICs and exchange of information.

The manual liaison process with New Zealand uses Autonomy Process Automation.

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For information on bulk data exchange, see International Data Exchange Program and auto-indexation of foreign pensions.

Australian liaison form + Read more ...

The following liaison form is completed by Centrelink International Services (CIS) and sent to New Zealand:

- **AUS187NZ** - Australia/ New Zealand Agreement on Social Security

For help with creating and completing the liaison form, see Agreement liaisons, NZ CICs and exchange of information.

New Zealand liaison form + Read more ...

The following liaison forms are completed by New Zealand and sent to CIS.

Autonomy Process Automation (APA)

The manual liaison process with NZ uses s47E(d) s47E(d) uses secure internet protocols to transfer a range of agreed forms.

Types of liaisons include:

- **Application for AUS Service:** this is a hardcopy liaison sent with claims for Australian pension

- **Generic Liaison Form:** used for any general enquiry

- **Service Decision:** used to notify decisions on claims

- **Residency Verification:** used to request residence information from New Zealand

- **Change of Payment Method:** used to advise of changes to bank accounts, including Special Banking Option (SBO)

- **Medical Details Request:** used to request medical examinations/forms

- **Review and Appeal Request:** used to facilitate customer appeals against NZ decisions

- **Arrears Payment Schedule:** used to reconcile embargo amounts

- **Debt Certificate:** used to request recovery of an Australian debt from NZ payments

- **Debt Recovery Schedule:** used to reconcile NZ debts recovered from Australian payments

	• **CIC Enquiry:** used to request information about an automated liaison
	• **General Adjustments Enquiry:** used to request information about Australian cost of living increase (CPI)
	See Agreement liaisons, NZ CICs and exchange of information.
Medical assessments	See Agreement Country Document Catalogue (ACDC) for samples of forms, foreign documents and translations.
	Medical assessments + Read more …
	As the definition of severely disabled applies to both countries, the domestic process and reports used in Australia are used by both countries under the Agreement. Specific forms are used to replicate the Australian domestic process in New Zealand.
	Medical examinations may also be undertaken upon request for foreign pension claim purpose. The liaison agency contacts Services Australia and request this. There is no provision for reimbursement of costs to either country.
	The customer should contact Services Australia if they receive a direct request from the liaison agency to undertake a medical examination. The customer must be advised to undertake Services Australia's foreign pension medical assessment process. Where the customer has already undertaken a medical examination based on a direct request from the Agreement partner without consulting Services Australia, the customer should contact the liaison agency to discuss any reimbursement options.
	If a customer is claiming reimbursement of costs based on undertaking a medical examination requested by Services Australia for foreign pension purpose, consider all evidence provided. For example, if incorrect advice was provided to the customer by Services Australia that caused them to seek an independent medical examination which caused the customer to be out of pocket.
	See Customer compensation and Act of Grace.
Double coverage/Taxation and Healthcare	See general information about early release of superannuation, refunds of contributions, double coverage, taxation and health insurance.
	Double coverage/certificates of coverage + Read more …
	There are no double coverage provisions in the Agreement with New Zealand.

Any enquiries about double coverage or certificates of coverage should be directed to the Australian Taxation Office (ATO) website.

Taxation + Read more ...

Any queries about taxation of pensions or the requirement to lodge a tax return should be directed to:

- In the other country - the tax authority in the other country directly

- In Australia - the Australian Taxation Office (ATO) website

See general taxation information, including issuing Australian payment summaries.

Tax treaty

Australia has a double tax agreement with New Zealand, which avoids the need to pay tax in both countries.

A person who is 'resident' in one country (according to the definition in the tax agreement) generally only pays tax on pensions in that country.

Tax deductions from income by one country may be allowed as a credit against tax payable in the other country.

Note: DSP is not taxable income in Australia but any New Zealand Supported Living Payment received in Australia is subject to taxation.

Tax deduction

NZ pensions:

- may be taxed at the source in New Zealand

- are not taxed in Australia as there is a limit in the Agreement which effectively means a person cannot receive more NZ pension in Australia than the taxed pension rate in New Zealand (Article 9(b)(i) and (ii) and Article 10(1)(b)(i) and (ii))

The gross rate of NZ pension, before **any** deduction is maintained.

New Zealand tax year

New Zealand uses the period 1 April - 31 March as the tax year.

Health Insurance/Medicare + Read more ...

Australia has a Reciprocal Health Agreement (RHCA) with New Zealand.

See general information on health insurance and Medicare coverage.

Any queries about:

	• Health insurance coverage in the other country – direct the customer to contact the health insurance authority in the other country • Medicare coverage - direct them to Medicare
Additional information	**Languages** + Read more … New Zealand has 2 official languages – English and Maori See Maori naming conventions and pronunciation. **Address and contact details** + Read more … Telephone country code is +64 Fixed telephone region codes: • North Island: 9, 7, 6 ,4 • South Island region code: 3 **Street address** Title FirstName Surname [Addressee] 195A Halifax Street [Street] Tahunanui [Suburb] Nelson 7011 [Town and postcode] NEW ZEALAND **Street address with unit/flat** Title FirstName Surname [Addressee] 12/455 Sydenham Street [Unit identifier, Street] Northland [Suburb] Wellington 6012 [Town and postcode] NEW ZEALAND **Rural address** Title FirstName Surname [Addressee] 220A Lynwood Avenue [Street number and street name] RD 1 ['RD' + RD number] Otaki 5581 [Town and postcode] NEW ZEALAND

	Post Office Box address
	Title FirstName Surname [Addressee]
	PO Box 17999 [PO Box and number]
	Greenlane [PO Box town]
	Auckland 1546 [Town and postcode]
	NEW ZEALAND
	Note:
	• The town or city, followed by the postcode, is mandatory for all addresses, e.g. Auckland 0620
	• If the postcode has a zero at the front, include the zero
	• Wherever possible, spell in full each word of the address, including words like 'Street' and 'Road'
	Same sex relationships + Read more …
	New Zealand's Civil Unions legislation recognises registered same sex couples to ensure that the registered couples have the same rights and entitlements as legally married couples under New Zealand law.
	New Zealand also allows same sex couples to be married.

Australian payments

Rules for Australian payments

Category title	Description
Payments covered	**Payments covered under the Agreement** + Read more …
	For Australia, the Agreement with New Zealand (Article 2.1) covers:
	• Age Pension
	• Disability Support Pension (DSP)
	• Carer Payment (CP)
	Note:
	• A person must be pension age for Age Pension (Article 11.2 and Article 12.4)
	• DSP is only covered where the customer:
	○ is severely disabled (Article 2.2(a)), **and**

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- o was resident in either Australia or New Zealand on the date the customer became severely disabled (Article 2.2(b))), **and**

- o was resident in the territory of the other party for at least one year prior to the date of severe disablement (DoSD) (Article 2.2 (c)). For example, if resident of New Zealand at lodgement/transfer to Agreement the customer must have accrued 12 months historical residence in Australia (residence periods as non-protected SCV holder is included) and vice versa. See Australian Residence Rules for New Zealand Citizens

- CP for carer partners of DSP only (Article 2.1(a)(iii)), noting the partner does **not** have to be paid by virtue of the NZ Agreement but can receive their payment under autonomous conditions or by virtue of an agreement with a third country

- Additional child amounts, also known as Overseas Child Component and Additional Child payment, are not included in the proportional rate calculation (s14A Social Security (International Agreements) Act 1999). See Rate calculation

For further information, see:

- NZ Agreement specific terms

- Residence and

- Working Age Residence (WAR)

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Claim forms and processes

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See Agreement Country Document Catalogue (ACDC) for samples of forms, foreign documents and translations.

In Australia + Read more …

Claims for Australian payments under International Agreements use the same methods and processes as domestic claims.

Note: New Zealand requires a person to reclaim their NZ pension when they move between Australia and New Zealand on a long-term basis.

In New Zealand + Read more …

New Zealand has similar legislation to Australia, which requires NZ pensioners to claim any foreign pension they are entitled. They usually issue the forms to the customer automatically.

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Forms to claim an Australian payment in New Zealand can be obtained by:

- downloading the form from the Services Australia website. See the [Resources](#) page for a link

- contacting Centrelink International Services (CIS)

- contacting the [New Zealand authorities](#)

Australian forms needed:

The customer is to complete and provide the following:

All claims

For all payments:

- **AUS140NZ** - Australian Pension Claim – Social Security Agreement between Australia and New Zealand

DSP only:

- **AUS142** - Work Capacity - Customer Information

- **AUS109** - Treating Doctor's Report - outside Australia

- **AUS175** - Medical Assessment Report - Disability Support Pension (Outside Australia)

Note: New Zealand arranges for the AUS175 to be completed on a case-by-case basis.

CP only:

- **AUS156NZ** - Assessment for Carer Payment - New Zealand

- **AUS156NZa** - Health Professional Assessment for Carer Payment - New Zealand

Note: other forms may be required. See [Medical assessments](#)

Forms can be lodged at any Work and Income office in New Zealand.

Under Section 4 of the Administrative Arrangements, New Zealand will:

- accept and date stamp the AUS140 form

- accept the ModiA form and any other Australian forms and/or supporting documentation

- verify the customer's identity and personal details

- if necessary, arrange medical forms to be completed, and

	send the form(s) and any supporting documentation to Services Australia with a liaison form specifying periods of coverage in New Zealand and information regarding New Zealand pension and any third country pension See Exchange of information and liaison forms.
Embargo of Australian arrears in a new claim	**Embargo of Australian arrears** + Read more … Where New Zealand is paying a pension and Australia grants a corresponding payment in New Zealand, New Zealand will recalculate their rate in accordance with the Agreement. Due to the direct deduction policy in New Zealand, this results in an overpayment for a period in the past. New Zealand always requests an embargo of the arrears of Australian pension to recover any debt. Arrears paid to SBO do not need to be embargoed as money paid into SBO accounts is 'kept' by NZ. Arrears paid to DPM **must** be manually embargoed on the s47E(d) screen within the new claim. Do not release arrears to a customer paid into a DPM account. The arrears amount is directed to a holding account by coding in the new claim activity. Embargoed amounts are sent to New Zealand every month. The Finance Tasmania Team is responsible for making payments and sending a schedule containing information about individual arrears payments to New Zealand. See New Zealand embargoes.
Lodgement rules and start day	All claims for Australian payments under International Agreements are assessed by Centrelink International Services (CIS). **Residence rules for claims** + Read more … If a person is not an Australian resident and in Australia on the date the claim is made, they may use the Agreement to meet the residence rules for claims if, on that date, they are: - an Australian resident (Agreement definition) or a resident of New Zealand (Article 11.1(a)) and - present long-term in Australia or New Zealand (Article 11.1(b)) **Note:** person must be at least pension age (Agreement definition) to claim Age Pension (Article 11.2).

	Claim lodgement + Read more ...
	
	Claims under the New Zealand Agreement
	
	Claims for Australian payment under the New Zealand Agreement may not be lodged in other Australian Agreement country.
	
	See Claim Lodgement Matrix (CLM).
	
	Accepting other Agreement claims
	
	New Zealand will not accept claims for Australian benefits under other Australian Agreements.
	
	Claim lodgement consideration
	
	There are no specific considerations under the New Zealand Agreement.
	
	Date the claim is 'made' and start day + Read more ...
	
	The normal rules for working out the date a claim is 'made' and the start day apply to claims under the Agreement with New Zealand. However, the Agreement also allows:
	
	• the date of lodgement of a claim for an Australian payment in New Zealand to be used as the date of lodgement in Australia (Article 17.2), or
	
	• the date of lodgement of a claim for a NZ payment in New Zealand to be used as the date of lodgement of a claim for the corresponding Australian payment (FP claim = AU claim) (Article 17.4) if:
	
	    o the customer requests the NZ claim to be considered as an Australian claim, or
	
	    o the person declares periods of residence in Australia at the time of claiming the New Zealand payment, and
	
	    o the Australian claim is received within 12 months of the NZ claim being lodged
	
	For coding help see:
	
	• Claims for Australian payments under International Agreements. and
	
	• Start Day (CLK)

Qualification/Totalisation	**Totalisation of Qualifying Periods** + Read more ...

The Agreement allows:

- totalisation of periods of Australian residence (Agreement definition) and periods of working age residence in New Zealand (NZWAR) to meet any minimum periods to qualify for an Australian pension, for example, 10 years for Age Pension (Article 12.1)

- the total of any non-continuous periods of NZWAR to be considered to be continuous to meet any continuous residence requirements (Article 12.3)

Note:

- CP has unique totalisation rules (see below)

- Overlapping Australian and New Zealand residence periods are only counted once (Article 12.2)

- Adjoining periods of Australian residence and periods of NZWAR can also be considered to be continuous (Policy)

See:

- Resources in International Social Security Agreements for examples of totalisation

- Residence and Working Age Residence (WAR) for further information

Age Pension + Read more …

A person must be at least pension age (Agreement definition) to be able to totalise for Age Pension (Article 12.5).

Disability Support Pension (DSP) + Read more …

For DSP, a person who was an Australian resident (Agreement definition) when they first met the continuing inability to work (CITW) criteria does not need to meet the 10 year qualifying residence requirement. This means that they do not need to totalise.

Carer Payment (CP) + Read more …

CP does not ordinarily have a minimum qualifying residence period however when claimed under the NZ Agreement, CP is only payable to a person if they have lived in New Zealand or Australia for a combined total of 2 or more years (Article 11.4).

This clause effectively imposes a residence requirement but may also allow a customer to overcome any Newly Arrived Residence Waiting Period (NARWP) that might ordinarily apply to them if they are inside Australia and claiming CP.

	See [Newly Arrived Resident's Waiting Period (NARWP) and Qualifying Residence Period](#). **Note:** a person who is resident and present outside Australia has not entered Australia and therefore does not have a NARWP. **Minimum Working Age Residence (WAR) to totalise** + Read more … To be able to use the totalisation provisions, a person who is not an Australian resident at the date of lodgement must have at least 12 months [Australian Working Age Residence (AWAR)](#) in Australia of which 6 months must be continuous (Article 12.3(a)). **Note:** unlike AWAR for rate, this period cannot be rounded. No minimum AWAR is required if the person is an Australian resident at the date of lodgement (Article 12.3(b)). **Ongoing requirements** + Read more … The Agreement allows the ongoing residence requirement for DSP and CP to be met. **Concession Card entitlement** + Read more … Entitlement to a Pensioner Concession Card (PCC) normally requires a person to be an Australian resident. However, customers paid under the Agreement with New Zealand are entitled to a pension provided they are in Australia, even if they are not residing in Australia (s1061ZA(4) Social Security Act 1991). To issue a PCC to a NZ Agreement customer who is temporarily in Australia, see [Pensioner Concession Card (PCC)](#). **Note:** there is an additional income concession card test that applies to special category visa (SCV) holders who are not 'protected' under Rate Calc B. See [Rate calculation](#).

Rate calculation	The New Zealand Agreement is unique in that it affects autonomous customers **and** customers paid under other agreements who:
	
	- receive:
	    - NZ Superannuation
	    - Supported Living Payment, or
	    - NZ Veterans' Payment, and/or
	- are [present long-term](#) **in New Zealand** and receiving:
	    - Age Pension

- Disability Support Pension (DSP), or

- Carer Payment (CP)

Rate calculation method + Read more ...

Consistent with agreements, there are 2 rate calculation types paid under the New Zealand Agreement. Each type has several different variations which are known by the different system codes that are applied:

- [Direct Deduction](#)
  Including Rate Calc A and B

- **Proportional**
  Including Rate Calc C, D, E and F

See information below on the rate calculation method codes.

The rate calculation method that applies is determined by the country in which the customer is [present long-term](#) as recorded in the s47E(d) field on the Residence Savings (s47E(d)) screen. A value of:

- s47E(d) will cause the direct deduction rate to be paid

- s47E(d) will cause a proportional rate to be paid

- s47E(d) will cause a non-New Zealand Agreement rate to be paid (where payable).

Present long-term in New Zealand + Read more ...

The Agreement with New Zealand contains specific proportional rate calculations where the person is [present long-term](#) in New Zealand (Article 13). [Additional child amounts](#) are **excluded** in these proportional rates.

This means:

- customers paid under the Agreement who are outside Australia are paid a proportional rate according to their Australian Working Life Residence (WLR), and

- the Rate Limiter/Limited Rate does not apply

Unlike Australia's other social security agreements that use Australian [Working Life Residence (WLR)](#), the New Zealand Agreement uses [Working Age Residence](#) (WAR) to calculate the proportional rate when one applies. The [Rate Limiter/Limited Rate](#) does not apply.

There are several proportional rate calculations defined in the New Zealand Agreement. The calculation which applies depends on whether the customer receives

- Age Pension or Disability Support Pension (DSP) or Carer Payment (CP), and

- whether the customer has 10 years historical residence in New Zealand or not

In all proportional rate calculations for customers present long term in New Zealand, the NZ pension is disregarded in the rate calculation.

The reason for this is that if a customer has lived in New Zealand for less than 10 years, they cannot qualify for NZ pension without the Agreement, so Australia takes responsibility for periods of residence in third countries (for Age Pension only) and changes the assessment of third country pensions (Agreement definition).

This may have a significant impact on the rate paid in New Zealand. Care must be taken when providing advice to customers, see below.

The New Zealand Agreement does **not** include the proportionalisation of any NZ defined benefit in the income test (Randisi concession).

Although a person may be qualified for an Australian payment or portable outside Australia, if the customer has no WAR the rate of payment outside Australia will be nil.

When a person is paid a proportional rate under an agreement, Rent Assistance (RA) cannot be paid. Other add-ons such as Energy Supplement and Pension Supplement are payable under normal add-ons portability rules.

Examples of when a customer is paid a proportional rate includes (but not limited to):

- permanently overseas

- temporarily overseas longer than 26 weeks for age pension

- former resident transferring to the agreement for portability

Age Pension

- **Rate Calc C** - If the customer has lived in New Zealand for less than 10 years:

- o (540 - NZWAR)/540 (Article 13.5(a))

- o any third country pension (Agreement definition) is assessed as a direct deduction (Article 13.7(b))

- o no minimum AWAR period

- **Rate Calc D** - If the customer has lived in New Zealand for 10 years or more:

  - o AWAR/540 (Article 13.5(b))

  - o any third country pension is assessed as ordinary income

  - o customer requires a minimum of 12 months AWAR

Disability Support Pension (DSP)

- **Rate Calc E** - If the customer has lived in New Zealand for less than 10 years:

  - o AWAR/(AWAR + NZWAR) (Article 13.6)

  - o any third country pension (Agreement definition) is assessed as a direct deduction (Article 13.7(b))

  - o customer requires a minimum 12 months AWAR

- **Rate Calc F** - If the customer has lived in New Zealand for 10 years or more:

  - o AWAR/(AWAR + NZWAR) (Article 13.6)

  - o any third country pension is assessed as ordinary income

  - o customer requires a minimum 12 months AWAR

Carer Payment (CP)

CP receives the same proportion as the DSP partner (Article 13.8).

Note: this also applies during any bereavement period. There are known issues with system processing for these cases. The approved workaround is to place the customer on a manual rate.

Returns to Australia

The NZ Agreement proportional rate continues to apply until the customer is present long-term in Australia (Article 13.9).

Note: a customer who is paid under the NZ Agreement is entitled to a Pensioner Concession Card (PCC) while they are temporarily in Australia. See Pensioner Concession Card (PCC).

Present long-term in Australia + Read more ...

Customers in Australia who receive a defined NZ benefit (NZ superannuation (NZS)), NZ Supported Living Payment (NZI) or NZ Veterans' Pension (NZV)) are paid a New Zealand Agreement specific direct deduction rate (Article 13.2).

Note:

- the direct deduction of any defined NZ benefit applies to **any** Australian Social Security income support payment

- defined NZ benefits are halved and applied equally to both members of a couple. Where both members of a couple receive a defined NZ benefit, the direct deduction amount is the combined total of both amounts which are then halved and applied equally to each person

Direct deductions generally reduce the maximum amount payable before the income and assets test is applied. Under the New Zealand Agreement, the income or assets test is applied first, giving the Australian Notional Rate. The direct deduction of any defined NZ benefit then applies.

If the person is not payable after the income or assets test is applied, that is their Australian Notional Rate is nil, the person is not entitled to income support. If the Australian Notional Rate is greater than nil but the rate is nil after the NZ direct deduction is applied the person is considered to be Current Zero Rate (CZR) (Article 15.3).

All income support payments

- **Rate Calc A** - If the customer is an Australian resident:

    o NZ benefits covered by the Agreement are ignored as income and direct deducted after the income or assets test (Article 13.2(c)), and

    o third country pensions (3CP) are assessed as for autonomous customers

- **Rate Calc B** - If the customer is a special category visa (SCV) holder who is not protected:

    o NZ benefits covered by the Agreement (Article 13.2(c)) and third country pensions (3CP) (Article

13.7(a)) are ignored as income and direct deducted after the income or assets test

The reason for Rate Calc B is that a SCV holder who is **not protected** will not qualify for Australian pension without the Agreement. New Zealand takes responsibility for periods of residence in third countries and changes the assessment of these payments.

Because the grant of a 3CP affects both the Australian and the New Zealand rates, the NZ Assumed Rate must be applied.

Rate Calc B additional income test for concession cards

Current zero Rate (CZR) customers may still get a Pension Concession Card (PCC), to avoid providing an advantage over autonomous customers, there is an additional income test for concession cards for customers paid Rate Calc B under the Agreement.

This additional income test applies Rate Calc A, that is, re-introduces third country pensions as income to see if the customer would have had an Australian Notional Rate under that calculation.

If so, the customer is eligible for the concession card but if not, their concession card entitlement will be end dated. This is shown on the s47E(d) screen where the reason for the end date of a concession card will be s47E(d)

Departures to New Zealand

The NZ Agreement direct deduction rate continues to apply until the customer is present long-term in New Zealand (Article 13.3).

Departures to third countries + Read more ...

Where a customer receives a NZ Agreement rate and that customer departs Australia or New Zealand for a third country, the rate calculation method that applies immediately prior to departure, i.e. proportional or direct deduction, generally remains the same for the period the Australian payment is portable under the terms of the Agreement (Article 13.10). That is, it will change immediately for permanent departures or after a defined period for temporary departures. See Portability.

Once the NZ Agreement rate calculation method ceases to apply, customers who remain payable, that is autonomous customers or those payable by virtue of another agreement, will revert to the rate that would otherwise have been payable.

This may be a non-proportional rate with or without supplements or a proportional rate based on Working Life Residence (WLR) etc.

Third country pass through situations

If a customer travels to New Zealand from Australia, or vice versa, and subsequently travels to a third country **before** the payment method changes, the payment method continues unchanged in that third country for the period of portability of the payment under the NZ Agreement, i.e. the payment method period resets. See Portability.

Assessment of defined NZ benefits + Read more ...

Regardless of the rate calculation method that may apply, the assessment of defined NZ benefits (NZ Superannuation (NZS)), NZ Supported Living Payment (NZI) or NZ Veterans' Pension (NZV) is dependent on the portability of that payment under New Zealand's portability rules. **Note:** this can lead to some unusual situations, such as the following where the direct deduction rate may not apply but the NZ pension is still being directly deducted. For example:

An autonomous DSP customer with indefinite portability who receives NZS departs Australia for a third country for a temporary period of 9 months. In this case:

- The direct deduction rate under the NZ Agreement continues to apply for the period of Australian DSP portability under the Agreement (28 days in 12 months)

- After 28 days the NZ Agreement rate calculation method ceases to apply and changes to the ordinary portability rate (non-proportional with supplements) but the NZS continues to be assessed as a direct deduction as the NZS portability period under the Agreement is 26 weeks

- At 6 weeks the supplements cease to be payable and NZS is still directly deducted

- At 26 weeks the DSP becomes proportional according to WLR (CITW occurred while resident outside Australia) and the NZS is ignored

In general, any defined NZ benefit paid to a person residing in a third country, will be assessed as income. However, in certain countries both the direct deduction or income testing of defined NZ benefits cease to apply (Article 13.1). This is because New Zealand has special arrangements, or Agreements of their own

	with these countries, which may alter the way they assess any Australian pension.
	The countries in which defined NZ benefits are ignored, for both temporary and permanent departures, are:
	• American Samoa (AS)
	• Cook Islands (CK)
	• Fiji (FJ)
	• French Polynesia (PF)
	• Greece (GR)
	• Guam (GU)
	• Guernsey (GG)
	• Ireland (IE)
	• Jersey (JE)
	• Kiribati (KI)
	• Marshall Islands (MH)
	• Micronesia (FM)
	• Nauru (NR)
	• New Caledonia (NC)
	• Niue (NU)
	• Northern Mariana Islands (MP)
	• Papua New Guinea (PG)
	• Pitcairn (PN)
	• Samoa (WS)
	• Solomon Islands (SB)
	• Tokelau (TK)
	• Tonga (TO)
	• Tuvalu (TV)
	• Vanuatu (VU)
	• Wallis and Futuna (WF)
Effect on Autonomous payments	**Effect on Autonomous payments** + Read more …

	The Agreement with New Zealand specifies the rate calculation that applies where an Australian benefit is payable, 'by virtue of this Agreement **or otherwise** to a person who is present long-term: • in New Zealand (Article 13.5/13.6) • in Australia (Article 13.2) **Note:** or otherwise refers to autonomous customers.
Portability	**Portability to New Zealand** + Read more … **Payments under the Agreement** The Agreement with New Zealand does not alter the allowable portability period for autonomous customers, or customers paid under other agreements, though the rate payable may be affected, depending on the length of stay in New Zealand. See Rate calculation. Provided the customer remains qualified, customers paid by virtue of the NZ Agreement, are payable indefinitely in both countries, that is, for temporary or permanent absences. **Note:** a customer present long-term in New Zealand may be qualified but not payable due to insufficient Working Age Residence. See Rate calculation. **Third country portability under the Agreement** + Read more … Portability to third countries for a customer paid under the Agreement is limited to temporary absences only. Payments will be suspended immediately for permanent departures from either Australia or New Zealand. Portability for temporary absences is as follows: • Age Pension – for the period that the payment is payable at a non-proportional rate under domestic rules. That is, 26 weeks (Article 14.5) • Disability Support Pension – for the period that the payment is portable under domestic rules, disregarding any exceptions or unlimited periods. That is, 4 weeks in a rolling 12 month period (Article 14.6) • Carer Payment – for the period that the payment is portable under domestic rules, disregarding any exceptions. That is, 6 weeks (Article 14.7) Customers paid by virtue of the Agreement will cease to be payable at the end of the Agreement portability period.

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Note:

- Customers paid Disability Support Pension by virtue if the NZ Agreement are portable for [Approved Temporary Absences](#) for up to 4 weeks, These absences are in addition to any portability period available under the Agreement See [Disability Support Pension (DSP) customer going overseas](#)

- From 1 July 2021, legislation passed to allow Age Pension customers paid by virtue of the NZ Agreement extended for specific circumstances, such as ill health or hospitalisation. See [Discretion to extend portability period](#)

- Portability extensions are not available under the NZ Agreement for DSP or Carer Payment in any circumstances

- There is no indefinite portability for Disability Support Pensioners paid by virtue of the NZ Agreement

Pass through situations

If a customer who is paid by virtue of the NZ Agreement travels from one country to another (e.g. Australia to New Zealand) and subsequently travels to a third country, the third country portability period applies from the date of departure from the other country, e.g. New Zealand.

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Transfers to/from Agreement

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Transfers to the New Zealand Agreement + Read more ...

If necessary, a customer receiving an autonomous payment covered by the Agreement may be able to transfer to the Agreement if they are in New Zealand when their normal portability period expires.

Note: the customer must meet the transfer requirements and satisfy any payment specific requirements under the Agreement, for example, being severely disabled for DSP. This means that non-severely disabled customers cannot transfer to the Agreement to extend portability to New Zealand.

If transferred to the Agreement, all Agreement rules apply to the customer, including [portability](#) and [rate of payment](#).

See:

- [Portability](#)

- [Rate calculation](#)

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	• [Transfer to international social security agreements](#) **Transfer to autonomous** + Read more … A person who would be autonomously qualified but is paid under the Agreement can transfer from the Agreement to autonomous only if they are a permanent resident and in Australia. **Note:** this is the normal version of Australian resident under s7 of the Social Security Act 1991, not the amended version under the Agreement. See [Residence](#). On return to Australia, system processing will automatically transfer from the Agreement to autonomous if the person is an Australian resident who has only used the Agreement to extend their portability while outside Australia. [Former resident provisions](#) may affect customers who transfer to autonomous if they leave Australia again within 2 years of becoming an Australian resident.
Paying customers in New Zealand	**Australian payments to overseas bank account** + Read more … Australian payments may be issued to customers outside of Australia. If the customer intends to be outside of Australia: • long-term (12 months or longer), their Australian payment may be issued to an overseas bank account. See [**O**verseas Bank Account Details (OBAD**)**](#) for payment requirements by country • for less than 12 months, payment will continue to their normal Australian bank account every 2 weeks. See [**D**elivery of payments to Centrelink customers outside Australi**a**](#) NZ has unique payment arrangements, including the [**S**pecial Banking Option (SBO**)**](#).

New Zealand payments

Rules for New Zealand payments

Category title	Description
New Zealand payments	**Payments covered under the Agreement** + Read more … Defined NZ benefits are only paid while [present long term](#) in Australia under the Agreement and may be limited by the capping provisions (Article 9.3 and Article 10.2), see [NZ Agreement specific terms](#).

Defined NZ Benefits

New Zealand Superannuation (NZS):

- is the equivalent to Age Pension and not to be confused with other private contributory pensions or superannuation in Australia

- is not income tested

- partners recipients who are not yet NZS age may receive a 'non-qualified spouse' payment. This is paid at the equivalent of NZS but is not payable long-term in Australia. If a 'non-qualified spouse' payment is received, the customer's NZS is income tested

Note: if a customer needs to use the Agreement to qualify for NZS, that is, if they are present long term in Australia or they need to totalise, the customer needs to be pension age (Agreement definition).

Supported Living Payment (NZI):

- is equivalent to Disability Support Pension (DSP) and is paid at a double rate where the person is partnered, even if the partner is not otherwise qualified for NZI. For this reason, Carer Payment partners of DSP were included in the Agreement

- is income tested in New Zealand but not in Australia

    o care needs to be taken to determine if the partner qualifies for NZI in their own right

- cannot be paid under the Agreement where the customer was living in a third country on the date, they became severely disabled

- recipient who reaches pension age and is entitled to NZS is no longer entitled to NZI (Article 6.8). For members of a couple, NZI ceases to be payable once both are of NZS age (Article 6.9)

- recipient to transfer to NZS will generally require a new claim form

Veterans Pension (NZV):

- is the same as NZS with war service criteria

- is not to be confused with NZ War Disablement Pension or Surviving Spouse Pension paid by the New Zealand

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equivalent of Veterans' Affairs (VANZ). See Other known payments below.

Other known payments + Read more ...

The following known payments are paid by the New Zealand authorities but are not covered under the Agreement:

- War Disablement/Surviving Spouse Pensions

- Exempt payments administered by the Ministry of Social Development (MSD)

    o Accommodation supplement

    o Disability allowance

    o Home help payment

    o Special benefit

    o Temporary additional support (formerly Special benefit)

    o Employment and work readiness assistance (formerly Training incentive allowance)

- Private NZ income streams - DATACOM/AXA/ING

- KiwiSaver

- Other payments administer by the Ministry of Social Development (MSD)

For help with:

- **Assessment** of NZ pensions, see Assessment

- **Coding** of NZ pensions, see Eligibility and Coding

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Comparable Foreign Payment (CFP)

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Requirement to claim CFP + Read more ...

The requirement to claim New Zealand pensions applies to NZS and NZI.

Note: the CFP requirement to claim NZ pension does not apply to a person who has been continuously in receipt of Australian income support payments, including if transferred between payments, since 1 July 2002 (Article 26.4).

See Foreign pensions claims.

However, such a person who goes long-term to New Zealand and claims a NZ pension must maintain that pension if they return to Australia long-term or deprivation of income rules apply.

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	Note: there are known issues with system processing to apply this exemption. Cases identified are to be corrected manually by selecting the relevant entry on the s47E(d) screen and coding 's47E(d) ' in the s47E(d) field on the s47E(d) screen. Foreign Pension System (FPS) screening for NZ pensions is largely automated although an MFU to determine whether the customer is severely disabled applies for Disability Support Pension (DSP) before a claim is issued. See <u>Foreign Pension System (FPS) statuses and reviews</u>. **Eligibility for New Zealand payments** + Read more ... The <u>Eligibility and coding of foreign pensions tab has detailed information on New Zealand payments</u> that are subject to CFP legislation.
New Zealand claim forms and processes	See <u>Agreement Country Document Catalogue (ACDC)</u> for samples of forms, foreign documents and translations. **In Australia:** + Read more ... To be paid in Australia, New Zealand law required a person to make a claim for NZ pension, even if they are already receiving the payment in New Zealand and then travel to Australia long term. Under the Agreement, a person who receives a NZ pension in New Zealand and then travels to Australia long term must claim that NZ pension again within a period based on the portability of the NZ payment: • 26 weeks for NZ Superannuation (Article 6.4) • 26 weeks for NZ Veterans Pension (Article 6.4), and • 4 weeks for Supported Living Payment (Article 6.5) In practise, the 'claim for one equals claim for the other' provision allows the Australian pension claim to be taken to be the claim for NZ pension (Article 17.4) to meet this requirement. **However**, as the rate of NZ pension in Australia is limited to the <u>Australian Notional Rate</u>, before the NZ pension claim can be processed, customers must either: • have their claim for an Australian pension finalised, or • if they already receive an Australian pension and are returning to become long term in Australia, must have their rate changed to the 'in Australia' rate **New Zealand claim packs:**

Claim packs are automatically issued through the Foreign Pension System (FPS) at the appropriate time. See [Assisting customers to claim a foreign pension](#).

- NZ claim packs may be reissued (via the ^{s47E(d)} screen) if necessary but generally should **not** be issued manually

- Customers should be informed of the requirements for Services Australia to determine the Australian Notional Rate before the NZ pension claim can be finalised. This can affect the timeliness

Specific requirements for New Zealand claims:

The customer is to complete and provide the following:

All claims:

- Application for New Zealand Benefit or Pension (NZ1)

    - NZ uses a combined claim pack, that is, it covers New Zealand Superannuation (NZS), Veterans Payment (NZV) and Support Living Payment (NZI)

- Appointment of Agent (ASSA 20) - only if appointing agent

- Redirection of Benefit Payment (ASSA 21) - only if appointing an agent

- Official Bank Statement

- 'Authorisation' for recovery of partner debt by embargo

Note:

- New Zealand will accept certification by Centrelink International Services (CIS) staff if the bank account indicated in the NZ pension claim matches the account being used for Australian payments. See [Exchange of information and liaison forms](#)

- If completed, the 'Authorisation' must not be sent to New Zealand but must be uploaded to the customer record if received and the result always noted in the foreign pension claim **DOC**

Requests for additional information

If information provided with the claim for New Zealand pension is incomplete, New Zealand will send requests for information direct to customers.

Receipt of foreign pension claim by Services Australia

	Under the Administrative Arrangements, New Zealand forms can be lodged in Australia at any service centre. See Processing a foreign pension claim.
	All foreign pension claims and supporting documents **must be scanned**, and - The original foreign claim form and (copies of) supporting documents **must be sent in paper form** to Centrelink International Services (CIS). See Processing a foreign pension claim
	Centrelink International Services (CIS) only:
	CIS will complete the following or arrange for the following to be completed as necessary and attach the documents to the foreign pension claim to send to the agreement country. See Agreement Liaison Detail (ALD) for method of transmission.
	All claims
	AUS187NZ - Australia/ New Zealand Agreement on Social Security
	For assistance with creating and completing the liaison form, see Agreement liaisons, NZ CICs and exchange of information.
	Supported Living Payment (NZI) only:
	copy of existing Australian medical information
	In New Zealand: + Read more …
	Enquiries regarding claims for NZ pensions in New Zealand should be directed to the NZ social security authorities.
Payment method and Indexation (CPI)	**Payment method** + Read more …
	NZ pensions are paid by direct deposit in Australia.
	Any queries about the non-payment of NZ pension should be directed to the NZ pension authorities.
	Frequency + Read more …
	Agreement pensions are paid:
	4 weekly payments in Australia and - fortnightly in New Zealand
	NZ usually advise weekly rates.
	Other benefits or private pensions are paid weekly, fortnightly, monthly or annually and coded.

	Currency + Read more ... New Zealand pensions must be recorded in the source currency – New Zealand dollars (**NZD**). Official statements provide the foreign currency amounts. Amounts recorded in source currency on the s47E(d) screen must **not** be changed to the Australian dollar amount. **Note:** payments into Australia are made in Australian dollars. **Indexation (CPI)** + Read more ... NZ payments are increased for Consumer Price Index (CPI, or cost of living) from 1 April each year. NZ CPI increases are usually updated via automated liaison. See Agreement liaisons, NZ CICs and exchange of information.
Assessment	**Agreement pensions (NZS/NZI/NZV) are generally:** + Read more ... - directly deducted (Article 13.2) and ignored in the income test (Article 8(8)(zc) Social Security Act 1991) for customers paid autonomously or under the New Zealand Agreement who are present long-term in Australia - exempt income for customers paid autonomously or under the New Zealand Agreement who are present long-term in New Zealand (Article 13.1) - ordinary income (not proportionalised) for customers paid autonomously or under the New Zealand Agreement or under another agreement, who are residing in a third country (Article 13.1) **Note:** - the direct deduction rate: - under the NZ Agreement does not apply in the same way as other agreements - or income testing of defined NZ benefits does not apply in certain countries. See Rate calculation - the assessment of defined NZ benefits continues to apply in third countries for the NZ portability period under the Agreement - each member of a couple is deemed to receive half of the total amount received by the couple (Article 13.4)

- the NZ Notional Rate is used in Current Zero Rate (CZR) processing and the NZ Assumed Rate (ASR) is used in certain circumstances

Third country pensions (e.g. UK pension) are:

- Directly deducted (Article 13.2) and ignored in the income test (Article 8(8)(zc) Social Security Act 1991) for customers paid under the New Zealand Agreement who are present long-term in Australia and who are non-protected SCV holders

- Directly deducted (Article 13.7) and ignored in the income test (Article 8(8)(zc) Social Security Act 1991) for customers paid autonomously or under the New Zealand Agreement who are present long-term in New Zealand and have less than 10 years New Zealand historical residence

- Exempt or ordinary income depending on the payment type in all other circumstances. See the relevant country file for assessment rules for the specific payment

The following payments are assessed as ordinary income: + Read more ...

War Disablement and Surviving Spouse Pensions

War Disablement Pension and Surviving Spouse Pension may be paid in Australia to a person:

- who was injured during military service in New Zealand, or

- the surviving spouse of such a person

These payments are made by the New Zealand Veterans' Affairs (VANZ).

These payments are indexed on 1 April each year.

Other payments administer by the Ministry of Social Development (MSD)

Any other non-Agreement or non-exempt payment administered by MSD is to be assessed as ordinary income.

Private NZ income streams - DATACOM/AXA/ING

DATACOM, AXA and ING are contributory pension schemes similar to superannuation in Australia. DATACOM is usually for ex-government employees. They are indexed on 1 April each year. See Foreign income and assets.

KiwiSaver

	KiwiSaver is a non-compulsory savings scheme. Most members will build up their savings through regular contributions from their pay. Members can choose which KiwiSaver scheme provider they join. Most KiwiSaver accounts are cashed in when the member ceases work and has turned 65.
	When provided as a:
	• bank statement showing the balance: Code on the s47E(d) screen as an overseas bank account
	• managed investment statement: Code on the s47E(d) screen
	The following payments are exempt: + Read more …
	These payments are exempt income test in all circumstances.
	Exempt payments administered by the Ministry of Social Development (MSD) include:
	The following payments are exempt income as per Section 8(8)(zd) SSA: 1991:
	• Accommodation supplement
	• Disability allowance
	• Home help payment
	• Special benefit
	• Temporary additional support (formerly Special benefit)
	• Employment and work readiness assistance (formerly Training incentive allowance)
Arrears debts, embargos and non-arrears debt recovery	**Arrears debts and embargo of defined NZ benefits** + Read more …
	The Agreement with New Zealand includes embargo provisions (Article 19.3).
	Claims for NZ pension lodged in Australia generally include a request for embargo of any NZ pension arrears when sent by Centrelink International Services (CIS). However, if the customer is reclaiming their NZ pension when moving long term to Australia, the NZ Assumed Rate of NZ pension is applied and there is no embargo.
	If requested, New Zealand will normally hold the arrears amount and send a Service Decision advising CIS of the details of the grant.

New Zealand send embargoed arrears on a monthly basis and send a schedule of the individual amounts via Liquid Office. See the Exchange of information and liaison forms. Tasmania Finance Team confirm receipt to CIS for amounts to be recorded on customer records.

See New Zealand embargoes.

Note:

- The rate of NZ pension for the arrears period is converted to Australian dollars using the exchange rate applicable to the month the payment is advised and is coded. The resulting debt amount (if any) is then retained with the remaining arrears (if any) sent to the customer

- Partner debts may be recovered from the customer's NZ pension arrears only if the 'Authorisation' has been completed and noted on the customer record. The authorisation form is included in the NZ claim package

- Where New Zealand convert the NZ dollar value of the arrears to Australian dollars using their own conversion rates and pay that amount to CIS, the debt is considered to be fully repaid, regardless of any difference in the amounts calculated and received

Where any individual embargo action fails, arrears debts for customers and their partners are raised under s1228A Social Security Act 1991 and recovered by normal methods under the Act. See Comparable Foreign Payment (CFP) lump sum arrears debts.

A **contravention debt:**

- may also occur if the customer does not advise of the grant of their New Zealand payment within their notification period. See Foreign pension coding

- or any other debt as a result of arrears of foreign pensions not resulting from a grant of a pension, cannot be recovered by embargo

Debt recovery (non-arrears) + Read more …

The Agreement with New Zealand is unique in allowing debts from one country to be recovered from the ongoing payments of the other country (Article 19.4). For the purposes of this part of the Agreement, payments are extended to mean any social security income support payment (Article 19.2).

Note: family assistance is outside the scope of the Agreement for both the exchange of information and recovery of debts.

	Under the Schedule to the Agreement and the Administrative Arrangements, there are a number of conditions that must be met before a debt can be recovered, including:
	- minimum amounts (A$400) and - the date the debt was first found to be owing (less than 5 years prior to the date of request for recovery) A Debt certificate is used to request recovery action from the other country. for requests made by Australia the AUS187 liaison form is used. See Agreement liaisons, NZ CICs and exchange of information. See New Zealand Agreement debt reconciliation - action for International Services (CIS).
Life certificates, notices and documents	See Agreement Country Document Catalogue (ACDC) for samples of forms, foreign documents and translations. **Life certificates** + Read more ... Life certificates are not used by New Zealand in Australia. Information is exchanged via automated liaison process. See Agreement liaisons, NZ CICs and exchange of information. **Notices and documents** + Read more ... Customers in Australia are sent notices at grant and for changes of rate each year for indexation.

Eligibility and coding of foreign pensions

Eligibility criteria for New Zealand Superannuation (NZS)

Table 1

Category title	Description
Claim limitations	Resident in Australia, New Zealand or country with which NZ has agreement. **Note:** Only required to claim in Australia
Age	Male 65 years in NZ, pension age in Australia. Female 65 years in NZ, pension age in Australia. **Note:** if in NZ and totalisation needed, customer can only qualify by virtue of the Agreement and therefore needs to be pension age

Qualifying periods	Domestic minimum: 10 years (120 months) of NZ historical residence after age 20, including 5 years after age 50. From 1 July 2024, the minimum historical residence required is gradually increasing from 10 to 20 years. See the Resources page for details of the increases. **or** Agreement totalisation: can totalise with AWAR to meet the domestic minimum. Minimum of 12 months NZWAR required to be paid in Australia.
Expiry	Death of pensioner, portability.
Compatibility	Can only receive NZS.

Eligibility criteria for Supported Living Payment (NZI)

Table 2

Category title	Description
Claim limitations	Resident in Australia or New Zealand only.
Age	16 years
Qualifying periods	Domestic minimum: 2 years (24 months) of NZ historical residence. **or** Agreement totalisation: Can totalise with Australian historical residence to meet the Domestic minimum. Minimum of 12 months NZWAR is required to be paid in Australia. **Note:** • must be severely disabled (Article2.2(a)), and • was resident in either Australia or New Zealand on the date the customer became severely disabled (Article 2.2(b)), and • was resident in the territory of the other party for at least one year prior to the date of severe disablement (DoSD) (Article 2.2(c)). For example, if resident of Australia at lodgement/transfer to Agreement the customer must have accrued 12 months historical residence in New Zealand

Expiry	Ceases when turns pension age if qualified for NZS. If partnered, ceases when younger member of the couple reaches [pension age](). **Note:** a claim is needed.
Compatibility	Can only receive NZI.

Agreement pension coding

Table 3: This table has coding of New Zealand agreement pensions on the s47E(d) screen.

Field	Coding required
s47E(d)	

s47E(d)

Other payment coding

Table 4: This table has coding of other New Zealand payments on the s47E(d)
screen.

Note: s47E(d)

Field	Coding required
s47E(d)	

s47E(d)

References

Policy

[Social Security Guide 10.2 Agreement with New Zealand](#)

[Social Security Guide 10.1 General Principles of Agreements](#)

Legislation

Links to the Federal Register of Legislation site go to an 'All versions' page. Select the 'Latest' version.

[Social Security (International Agreements) Act 1999 Schedule 3, New Zealand](#)

[Social Security Act 1991](#)

- section 8, Income test definitions

    - subsection 8, 'Excluded amounts - general' and then 'a payment made to the person' (paragraph j)

Resources

Intranet links

[Residence and International program](#)

[Centrelink International Services (CIS)](#)

Contact details

[Centrelink International Services (CIS) - contact details for staff](#)

[Centrelink International Services (CIS) - contact details for customers](#)

[Australian Taxation Office (ATO)](#)

Services Australia website

[Services Australia](#)

Medicare phone numbers

Qualifying periods for New Zealand Superannuation

Increases to minimum historical residence

Date of birth	Minimum residence required since turning 20
On or before 30 June 1959	10 years
1 July 1959 – 30 June 1961	11 years
1 July 1961 – 30 June 1963	12 years
1 July 1963 – 30 June 1965	13 years
1 July 1965 – 30 June 1967	14 years
1 July 1967 – 30 June 1969	15 years
1 July 1969 – 30 June 1971	16 years
1 July 1971 – 30 June 1973	17 years
1 July 1973 – 30 June 1975	18 years
1 July 1975 – 30 June 1977	19 years
On or after 1 July 1977	20 years

ADMINISTRATIVE ARRANGEMENT

FOR THE APPLICATION OF

THE AGREEMENT ON SOCIAL SECURITY

BETWEEN THE GOVERNMENT OF AUSTRALIA

AND

THE GOVERNMENT OF NEW ZEALAND

Ver. 2017

In accordance with Article 21 of the Agreement on Social Security between the Government of Australia and the Government of New Zealand, signed on 8 December 2016, the Competent Authorities hereby make the following Administrative Arrangement in order to implement that Agreement. This Administrative Arrangement is set out in Sections.

Section 1

Terminology

1. In applying this Administrative Arrangement:

    actual rate

    (a) in relation to Australia means:

        (i) for a person who is present long-term in New Zealand, the rate of Australian benefit payable to the person after proportionalisation and, where applicable, the deduction of any third country pension as specified in the Agreement; and

        (ii) for a person who is present long-term in Australia, the rate of Australian benefit payable to the person after the deduction of any New Zealand benefit, and, where applicable, any third country pension, as specified in the Agreement;

    (b) in relation to New Zealand means:

        (i) for a person who is present long-term in Australia, the rate of New Zealand benefit payable to the person after proportionalisation and, where applicable, the deduction of any third country pension and the application of any limitation of that rate to the rate of Australian benefit as specified in the Agreement; and

        (ii) for a person present long-term in New Zealand, the rate of New Zealand benefit payable to the person after the deduction of any Australian benefit and, where applicable, any third country pension as specified in the Agreement;

    Agreement means the Agreement on Social Security between the Government of Australia and the Government of New Zealand signed on 8 December 2016.

    Arrangement means this Administrative Arrangement;

    assumed rate in relation to Australia means an estimate of the actual rate of New Zealand benefit for a person who is present long-term in Australia, as calculated by the Australian liaison agency.

    Liaison Agency means:

    (a) in relation to Australia, the Department of Human Services, International Programme; and

    (b) in relation to New Zealand, International Services, a service of the Ministry of Social Development in Wellington;

    migration information means information relating to a person's arrival in Australia or New Zealand and departure from that country, including:

    (a) the person's full name, date of birth, and sex;

    (b) the person's passport number or numbers and nationality, if available; and

    (c) the date on which the person arrived in, or, as the case may be, departed from that country;

notional rate

    (a)   in relation to Australia means the rate of Australian benefit that would be payable to a person who is present long-term in Australia if:

        (i)   for a SCV holder the person was not entitled to a New Zealand benefit and/or a third country pension; and

        (ii)   for a permanent resident of Australia, the person was not entitled to a New Zealand benefit; and

    (b)   in relation to New Zealand means the rate of New Zealand benefit that would be payable to a person who is present long-term in Australia before the application of the limitation of that rate to the rate of Australian benefit as specified in the Agreement;

SCV holder means the holder of a special category visa under the Migration Act of 1958 of Australia who is not a permanent resident of Australia.

2.   Any other term defined in the Agreement, when used in this Arrangement, has the same meaning as in the Agreement.

Section 2

Communication between Liaison Agencies

1.   Communications concerning the operation of the Agreement and of this Arrangement will be sent to and from, as the case requires, the appropriate liaison agency.

2.   The liaison agencies will be able to communicate directly with each other and with their clients.

3.   Where possible, information will be sent between liaison agencies by secure electronic transmission.

Section 3

Preparation of Forms and Documents

1.   Forms and any other documents required for the implementation of the Agreement or this Arrangement will be prepared by the liaison agencies after consultation between them.

2.   The liaison agencies will decide the procedures necessary to implement the Agreement and this Arrangement.

3.   Any subsequent changes to forms, other documents or procedures necessary to implement the Agreement and this Arrangement will be decided after consultation between the liaison agencies.

Section 4

Lodgement and Processing of Claims

1.   Claims for benefits, appeals, any related documents and any notification or other communication by a person will be lodged with:

    (a)   in Australia, the Australian competent institution; and

    (b)   in New Zealand, the New Zealand competent institution.

2. Where a claim for a benefit under the legislation of one country is lodged with the competent institution of the other country in accordance with paragraph 1 of this Section, the competent institution or the liaison agency receiving the claim, without delay, will:

    (a) stamp the claim form with the date of receipt;

    (b) check the claim for completeness and, if incomplete, arrange for the outstanding details to be obtained;

    (c) verify the claimant's identity and validate the personal details contained in the claim form on the basis of the documents supplied by the claimant, in accordance with the requirements of the respective liaison agencies and, where required, make certified copies of original documents; and

    (d) in the case of a claim for a disability related benefit, arrange for the completion of the agreed medical report.

3. Where a claim for a benefit under the legislation of one country is lodged with the competent institution of that country and the person is, or may be, in receipt of a benefit from the other country, the liaison agency receiving the claim will,

    (a) in relation to Australia:

        (i) if the Australian claim is granted, apply the assumed rate of New Zealand benefit in the assessment of the claim; or

        (ii) if the Australian claim is rejected, send a liaison to the New Zealand liaison agency indicating the determination and, if the person may be entitled to a New Zea land benefit under the Agreement, the notional rate of Australian benefit that would have been paid to the person had they been entitled to an Australian benefit; and

    (b) in relation to New Zealand, send a liaison to the Australian liaison agency requesting confirmation of the proportional rate of Australian benefit as specified in the Agreement.

4. Where a request is received under subparagraph 3(b) of this Section, the Australian liaison agency will determine the proportional rate of Australian benefit and send the information to the New Zealand liaison agency in a liaison.

5. In all cases, where a claim is received in accordance with paragraph 2 of this Section, the liaison agency receiving the claim will:

    (a) complete a liaison indicating, in particular:

        (i) periods of residence in Australia, New Zealand and third countries determined in the assessment of a claim for benefit from that country;

        (ii) the annual rate of any third country pensions that the person is already receiving in the currency of that third country;

        (iii) whether the person is also applying for any third country pension;

        (iv) in the case of the Australian liaison agency, the notional and actual rate of Australian benefit;

        (v) in the case of the New Zealand liaison agency, the notional and actual rate of New Zealand benefit;

        (vi) whether or not it intends to request payment of a debt under Article 19(1) of the Agreement from arrears of a benefit that may be paid by the other liaison agency; and

(b) send to the other liaison agency:

    (i) the application form;

    (ii) any supporting documentation required by the other liaison agency, including in the case of a claimant for a disability related benefit, agreed medical reports and medical documentation; and

    (iii) a completed liaison.

6. Upon determination of a claim transmitted in accordance with subparagraph S(b) of this Section, the relevant liaison agency will notify the other liaison agency of that determination and send the necessary details in a liaison.

7. When a request has been made in accordance with subparagraph S(a)(vi) of this Section, the relevant liaison agency will, upon grant of benefit, withhold any arrears payable and forward the arrears to the requesting agency in accordance with Article 19(3) of the Agreement.

Section 5

Grants of Third Country Pensions

Where a SCV holder in receipt of a benefit from both countries who is present long-term in Australia is granted a third country pension,

(a) the Australian liaison agency will:

    (i) apply the assumed rate of New Zealand benefit in the assessment of the change in ongoing actual rate of Australian benefit due to the third country pension,

    (ii) where applicable, use the assumed rate of New Zealand benefit in the calculation of any arrears debt under the legislation of Australia due to grant of the third country pension, and

    (iii) notify the New Zealand liaison agency of the rate of the third country pension in the currency of the third country in a liaison;

(b) the New Zealand liaison agency will, on receipt of the liaison, review the rate of New Zealand benefit payable in accordance with the New Zealand legislation and notify the Australian liaison agency of the change to the actual rate of New Zealand benefit due to the third country pension in a liaison; and

(c) the Australian liaison agency will, on receipt of the liaison, apply the actual rate of New Zealand benefit in the assessment of the actual rate of Australian benefit and make any necessary adjustment in accordance with the Australian legislation.

Section 6

Information on Residence

1. Where there is doubt, after having applied the definitions in Article 5 of the Agreement, as to whether a person is, or was at any time, a resident of New Zealand or Australia or a third country, the liaison agency that has the concern will contact the other liaison agency to consult on the matter.

2. When the liaison agencies have reached a decision, the liaison agency that initiated the consultation, will write to the other liaison agency setting out the terms of the decision.

3. For the purposes of Article 16(2) of the Agreement, the decision will be deemed to have finalised when the other liaison agency confirms in writing that the notification has been received and the decision has been accepted.

Section 7

Medical Examinations

1. A liaison agency, at any time, may request the other liaison agency to arrange for the medical examination of a person who is in the territory of the other liaison agency.

2. Where a request is made under paragraph 1 of this Section, the other liaison agency will arrange for the completion of the agreed medical report and send it to the requesting liaison agency.

3. Each liaison agency will meet the costs of any medical examination or assessment that has been made in its territory.

4. Where one liaison agency determines a claimant for disability related benefit to be severely disabled, but the other does not agree with the decision, the following action will be carried out:

   (a) a suitably qualified representative of each agency will discuss the respective decisions to establish the reasons for the difference;

   (b) each liaison agency will ensure the other has access to all relevant information on which the assessment made; and

   (c) where possible, consensus should be reached on the assessment of the case in question.

5. In the event that consensus is not reached, each liaison agency will implement its own decision on the severely disabled status of the claimant and will advise the other liaison agency in writing of the reasons for that decision.

Section 8

Remittance of Recovered Amounts from Arrears

1. Where a liaison agency has requested recovery of an overpayment of a debt under Article 19 of the Agreement the other liaison agency will withhold such amounts from benefits payable by it as decided between the liaison agencies.

2. Periodically, as decided between the liaison agencies, the liaison agencies will pay each other the amount recovered of all debts for which recovery is made under this section during the period concerned, and, at the same time, will send a list to the other agency giving:

   (a) the names, reference numbers and date of birth of all the persons to whom the debts relate; and

   (b) the amounts actually recovered in the appropriate recovery period in respect of each debt.

3. The relevant liaison agency will, on receipt of the remitted amounts, recover its debt and, where applicable, send any remaining amounts to the benefit recipient.

Section 9

Recovery of Debt

1. For the implementation of Article 19 of the Agreement, the liaison agency that requests the recovery of a social security debt, will send the other liaison agency the following information:

   (a) the name, date of birth, benefit type, client reference number, reason for overpayment, period of the debt, date of establishment of the debt and, where known, the address of the debtor;

   (b) the amount of the debt to be recovered in both Australian and New Zealand currencies, and the exchange rate used for the conversion and the date of the conversion; and

   (c) a certificate certifying that the debt complies with all the criteria and contains all the details specified in paragraph 1(a) of Part B of the Schedule to the Agreement.

2. Periodically, as decided between the liaison agencies, the liaison agencies will pay each other the amount recovered of all debts for which recovery is made under this section during the period concerned, and, at the same time, will send a list to the other agency giving:

   (a) the names, reference numbers and date of birth of all the persons to whom the debts relate; and

   (b) the amounts actually recovered in the appropriate recovery period in respect of each debt.

Section 10

Minimum Recovery Amounts

1. The minimum amounts to be recovered under Article 19 of the Agreement will be Australian$400 or the New Zealand equivalent.

2. The liaison agencies from time to time may determine, in writing, to vary the minimum amount of debt to be recovered.

Section 11

Appeals and Related Documents

A competent institution or liaison agency that receives appeals and related documents under the legislation of the other liaison agency will:

   (a) stamp the document with the date of receipt;

   (b) record the receipt of the documents in its own liaison agency; and

   (c) send the documents within 14 days to the other liaison agency.

Section 12

Exchange of Information

1. A liaison agency may request information under Article 18 of the Agreement, subject to the limitations of Article 20 of the Agreement, about any individual who is an applicant for, or a recipient of a benefit as defined in the Agreement or under the social security laws of either New Zealand or Australia. The other liaison agency will supply the information in as timely manner as is possible.

2. Information may be exchanged on an ad-hoc basis or under a regular information matching programme. Details of arrangements for processing information about changes in circumstances of mutual benefit recipients are contained in the Supplementary Administrative Arrangement.

3. The types of information that may be requested or exchanged under this Section are as follows:

   (a) In every instance, this information will accompany a change of circumstance record:

      (i) Work and Income Reference Number,

      (ii) Australian Customer Reference Number, and

      (iii) Date of birth;

   (b) And may include any of the following change of circumstances:

      (i) Change of name,

      (ii) Change in marital status,

      (iii) Death of client or spouse or partner,

      (iv) Change in the number of dependent children (inclusion or exclusion),

      (v) Change of address,

      (vi) Change of bank account details,

      (vii) Change in country of presence,

      (viii) Change of service status (e.g. benefit suspended, cancelled, expired, resumed or declined) and reason for the change,

      (ix) Cancellation of service due to death of the primary client,

      (x) Change in rate of benefit or pension payable,

      (xi) Change in third country pension,

      (xii) Accumulation of 10 years residence in New Zealand,

      (xiii) Change of Australian residency status (e.g. SCV holder to Australian permanent resident),

      (xiv) General increase details and rate reviews, or

      (xv) Change of income;

   (c) An effective date or date of event will be provided for each change of circumstance.

4. Provided that the liaison agencies have obtained any necessary consents from their respective Privacy Authorities, the liaison agencies may determine in writing to add, amend or delete items of information to be exchanged to or from the list in paragraph 3 of this Section.

Section 13

Exchange Rates

The exchange rates to be used are the exchange rates normally used by each liaison agency.

Section 14

Statistical Information

The competent authorities or liaison agencies will exchange statistics on an annual basis regarding the payments which each has made under the Agreement; these statistics will include data on the number of beneficiaries and the cash value of benefits paid, by the type of benefits.

Section 15

Mutual assistance and processing standards

1. The liaison agencies will cooperate in achieving the standards set out in this Arrangement for the processing of claims lodged under the Agreement and in all other aspects of the operation of the Agreement.

2. The liaison agencies will implement any measures deemed necessary and appropriate to improve the operation of the Agreement.

Section 16

Review of the Arrangement

This Arrangement may be amended in writing at any time upon the competent authorities reaching consensus.

Section 17

Commencement

This Arrangement will commence on the same day the Agreement enters into force and will operate, with amendments which may only be made in writing by the competent authorities from time to time, for the duration of the Agreement.

Signed in duplicate at Canberra on 30th day of June 2017 by the Australian side and at Wellington on the 20th day of June 2017 by the New Zealand side.

FOR THE COMPETENT AUTHORITY

OF AUSTRALIA

FOR THE COMPETENT AUTHORITY

OF NEW ZEALAND

SUPPLEMENTARY ADMINISTRATIVE ARRANGEMENT

FOR THE APPLICATION OF

THE AGREEMENT ON SOCIAL SECURITY

BETWEEN THE GOVERNMENT OF AUSTRALIA

AND

THE GOVERNMENT OF NEW ZEALAND

Ver. 2017

Section 1

**Exchange of information between New Zealand and Australia on
Change in Circumstances of Mutual Benefit Recipients**

1. Under the terms of the Agreement on Social Security between the Government of Australia and the Government of New Zealand, signed on 8 December 2016 (the Agreement), the rate of benefit paid by New Zealand is generally dependent on the rate of payment made by Australia. Conversely, the rate of benefit paid by Australia is generally dependent on the rate of payment made by New Zealand. A change of circumstance for a person who is receiving both an Australian and a New Zealand benefit can affect continuing entitlement or the rate of payment of those benefits. It is therefore important that one country advises about any change in circumstance for a mutual benefit recipient, resident in that country, so that the other country can also determine continuing entitlement or rate payable.

2. For

   a) information matching programme requests, the liaison agencies will exchange information electronically about changes of circumstances of mutual benefit recipient after the close of business for each agency on each working day;

   b) ad hoc information requests, the initial information about benefit grant details will be provided on an individual basis and will not be included in the change of circumstances information exchange. Further information exchanges of information may occur on an individual basis, where necessary, to determine individual entitlement.

3. The liaison agencies will exchange information about change of circumstances relating to mutual benefit recipients as specified in paragraph 3 of Section 12 of the Administrative Arrangement for the Application of the Agreement between Australia and New Zealand on Social Security (the Administrative Arrangement).

4. The generating agency will obtain the information listed in paragraph 3 of Section 12 of the Administrative Arrangement from its own database. Where a change in circumstances has occurred for a mutual benefit recipient, the relevant information will be extracted to a file. This file will be created after the close of business for each agency on each working day. The file contains the Australian customer reference number, the New Zealand reference number and a date of birth which allows each agency to securely identify a benefit recipient.

5. The file is encrypted by one liaison agency and sent to the other via a secure electronic transmission link. Each agency will store a copy of the file in a secure archive.

6. Any individual Change in Circumstance record within the file that fails validation will be output in an exception report for manual action by the respective liaison agency. In the event that the file is corrupted in transit, the archive file will be retrieved and this copy is re-sent to the receiving agency.

7. The file received by the Australian liaison agency will be applied and the Australian system updated automatically or manually, as appropriate. Where a change of rate or entitlement occurs, the Australian liaison agency will notify their customers as required under Australian legislation.

8. The file received from the Australian liaison agency will be uploaded into the SWIFTI environment, which is the core benefit assessment and payment system used by the liaison agency of New Zealand. A batch process identifies what information should be updated in SWIFTI and what information is a core information change that should appropriately be updated in the Single Client Management system

(SCMS). SWIFTI is automatically updated where appropriate. All other actions are downloaded to the New Zealand liaison agency for manual action.

New Zealand records will automatically update where there is a:

- change in the Australian notional rate;

- change in the Australian payment rate as a result of an Australian general increase in payment rates;

- change in the Australian payment rate as a result of Australian income and asset calculations;

- change in the Australian payment rate as a result of a monthly exchange rate amendment where a third country pension is also being paid;

- change in the rate of third country pension paid to a permanent resident of Australia;

- change in Australian residency status (e.g. from special category visa holder to Australian permanent resident); or

- cancellation of an Australian benefit. This will automatically suspend the New Zealand benefit and follow-up manual action will be taken to determine continuing entitlement.

All other changes are down-listed as exception reports for manual action.

During the upload to SWIFTI or exception report process, the client record will be checked to ensure that New Zealand Privacy Act 1993 compliance requirements have been met. Where there is no 'Section 103' indicator on a client record, there will be no automatic update. The record will be an exception to a down-list for a manual Section 103 action and all Change in Circumstances activity for this client will be held until the 103 process has been finalised.

At the end of the electronic exchange, the file and any backup files are destroyed within the time specified by either New Zealand or Australian privacy legislation, as appropriate.

9. Each message (Change in Circumstance record) within the file will contain the Australian and New Zealand reference numbers and codes defining the change in circumstance that has occurred.

It will be possible for a file to contain more than one change for a benefit recipient. Where there is more than one Change in Circumstances for a benefit recipient, the message header including the reference number match will be repeated along with the subsequent Change in Circumstances.

The file format is specific to the information exchange between New Zealand and Australia, authorised by the Agreement. The file is encrypted to ensure security of the transfer of information.

The Change in Circumstance file contains the following information:

- standard format file header;

- message header, indicating a new entry, for each Change in Circumstances record;

- Australian customer reference number;

- New Zealand reference number;

- individual Change in Circumstances record for each change for each benefit recipient;

- record footer, indicating the end of the entry; and

- file trailer.

The file header will contain:

- identification of the sending agency and the receiving agency;
- file number; and
- date and time stamp.

The file trailer will contain:

- a repeat of the file number; and
- the number of transactions within the entire Change in Circumstance file, to be used for internal validation.

Section 2

Review of the Supplementary Administrative Arrangement

This Supplementary Administrative Arrangement may be amended in writing at any time upon the competent authorities reaching consensus.

Section 3

Commencement

This Supplementary Administrative Arrangement will commence on the same day as the Agreement enters into force and will operate, with amendments which may only be made in writing by the competent authorities from time to time, for the duration of the Agreement.

Signed in duplicate at Canberra on 30th day of June 2017 by the Australian side and at Wellington on the 20th day of June 2017 but he New Zealand side.

FOR THE COMPETENT AUTHORITY

OF AUSTRALIA

FOR THE COMPETENT AUTHORITY

OF NEW ZEALAND