Disability Support Services

MINISTRY OF SOCIAL DEVELOPMENT
TE MANATŪ WHAKAHIATO ORA

OBIR User Guide

Contents

Document History

Revision History

Version	Date Updated	Summary of Changes	Author(s)
V2	13/04/2026	1. OBIR URL included 2. Assessment status description 3. Action required status description 4. Instructions for PDF mindmap download 5. Instructions for DSS Support team to request more information	Alex Tierney, Rachel O Connor

Note changes will be highlighted in grey.

1 Introduction

This user guide covers how to perform and manage assessments within the Outcomes Based Indicative Range (OBIR) web application. The purpose of these assessments is to understand the Disabled Person's strengths, goals, and support needs in order to enable a good life. The information captured will be used to calculate an indicative funding range.

The system roles relate to the following:

- **Assessor** aligns with the Needs Assessor/Connector role
- **Allocator** aligns with the Service Coordinator/Budget Advisor role
- **Manager** aligns with the NASC/EGL manager's role
- **DSS Allocator** is the DSS Indicative Range team

From an application perspective, the key stages are:

1. An **Assessor** creates an assessment within OBIR
2. That assessment is assigned to an **Allocator** for review
3. Once the review stage is complete, the assessment is assigned to **DSS Allocator** to support calculation of an indicative range (this is currently done via Excel)
4. The Indicative Range is entered into OBIR by **DSS Allocator and** reviewed by the **Allocator**
5. The assessment can then be picked up by either the **Assessor** or **Allocator** to create a "My DSS Funding Plan"

The above describes a basic, straightforward flow. However, in certain cases assessments will need to be sent back to the Assessor in order to get more information, or may need to be sent to a Manager for approval if the indicative range is above a defined threshold.

OBIR Application URL: https://obirportal.msocio.nz/login

2 Dashboard

Depending on your assigned role on your Dashboard, you may:

Assessor only

- Launch a new assessment
- Edit, view or delete an existing assessment
- View or action your tasks
- See recent people

Allocator only

- View assigned assessments
- View and action tasks
- See recent people

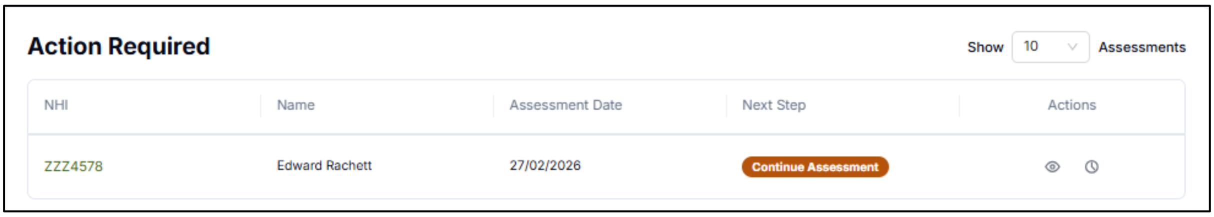
If assigned both roles all the above will be accessible.

Manager

- Launch a new assessment
- View assigned assessments
- View and action tasks
- See recent people

2.1 Searching the Dashboard

You can search for tasks and/or assessments created by or assigned to you by typing the Disabled Person’s NHI, First Name, and/or Last Name in the respective fields and clicking **Search**:



The system will then display any tasks and assessments matching the search:

Recent People

NHI	Name	Assessment Date	Status	Actions
ZZZ4578	Edward Rachett	27/02/2026	In Progress	

2.2 Assessment Statuses

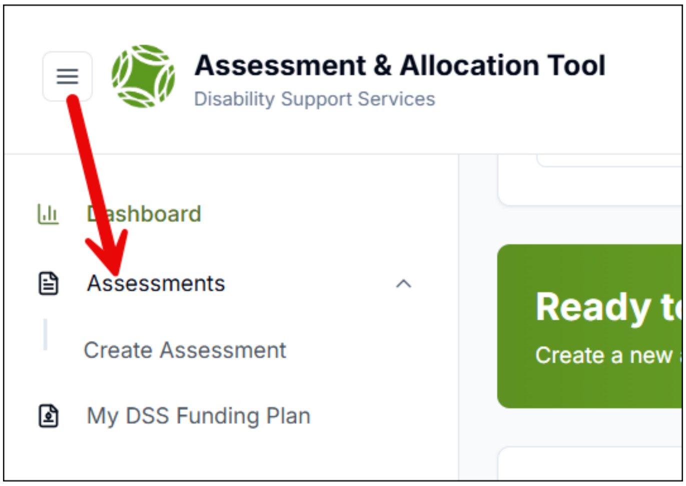
Assessment Status	Description	Actor
Draft	Assessment has been started but not finished.	Assessor
Ready for Moderation	Assessment is complete and ready to be reviewed.	Allocator
Moderation in-progress	Assessment is currently being reviewed.	Allocator
Info Requested	More information is needed before it can continue.	Assessor
Ready for IR	Moderation is complete and assessment has been sent to DSS for IR calculation	DSS
Indicative Range in-progress	Indicative Range is being worked on by DSS or has been sent back to the allocator	DSS/ Allocator
Assessment Completed	Assessment has been finalised.	Allocator
Awaiting Approval	Waiting for approval of IR before moving forward.	Manager
Assessment Completed	Assessment has been finalised.	Assessor
Declined	IR has been declined.	Allocator
Funding Plan Completed	Funding plan has been finalised.	Assessor/Allocator

2.3 Searching/Viewing Assessments

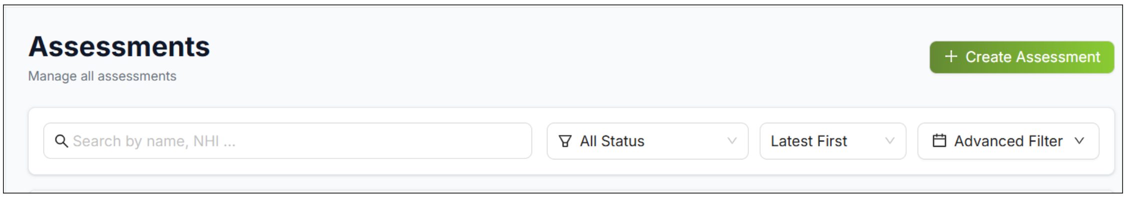
You can easily view an assessment by doing the following:

1. Ensure the lefthand panel is expanded by clicking the icon with three lines (top left corner):

2. Click **Assessments**:

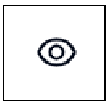


3. Here you can use the Search bar and/or filters to find the assessment you need:

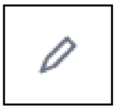


4. Click the **Eye** icon next to the assessment to open it up in View mode:

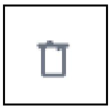
5. To view an assessment, click this icon:



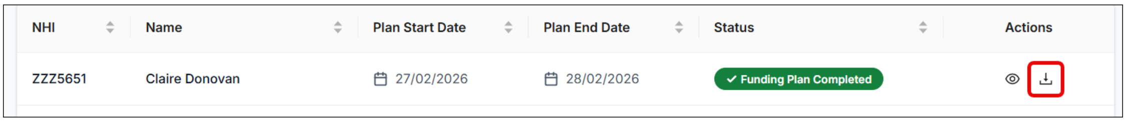
6. To edit an assessment, click this icon:



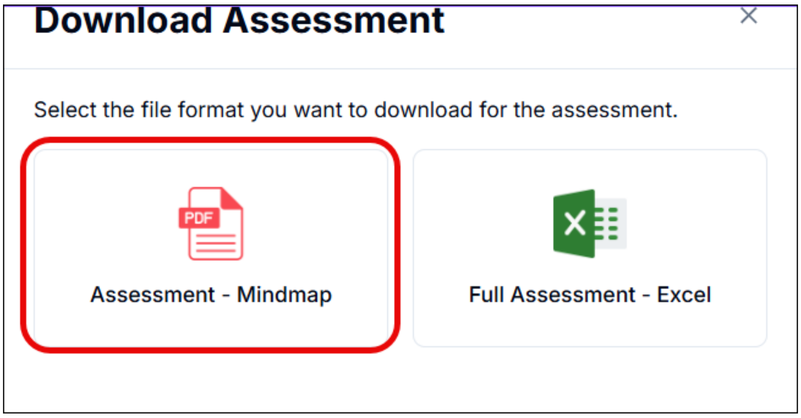
7. To delete an assessment, click this icon (Please note, only assessment creators can delete an assessment):



8. Click the **Down Arrow** icon to download the completed assessment and funding plan:



9. There are two download options: Download as a PDF Mind-map, or Download as an Excel file. To proceed, click the appropriate option:

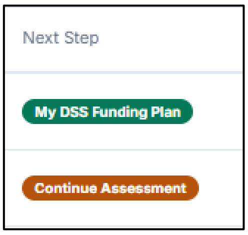


10. Downloaded assessments can be printed/emailed to the Disabled Person for confirmation the information is complete and correct.

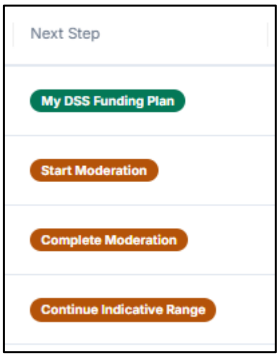
2.4 Action Required

In the *Action Required* section, you can see your tasks relating to assessments either created by the you or assigned to you.

The Assessor only role will see Continue Assessment and My DSS Funding Plan as next step tasks:

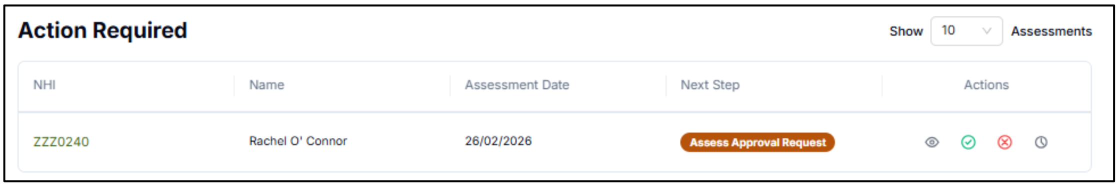


The Allocator only role will see Start Moderation, Complete Moderation, Continue Indicative Range and My DSS Funding Plan as next step tasks:

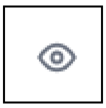


If assigned both roles all the above will be accessible.

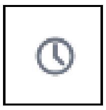
The Manager role will see assessments where the Indicative Range requires approval:



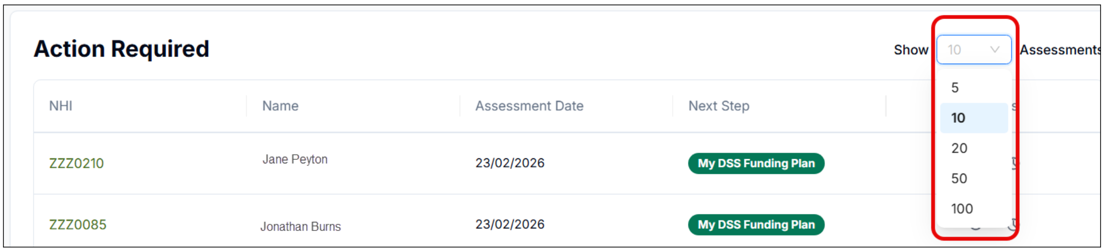
To view an assessment related to an action required, click the **View** icon next to it:



To view a log of previous steps related to this assessment, click the **View History** icon:



You can use this selector to specify how many actions you want to be displayed within the *Action Required* section at any one time:



2.4.1 Action Required Statuses

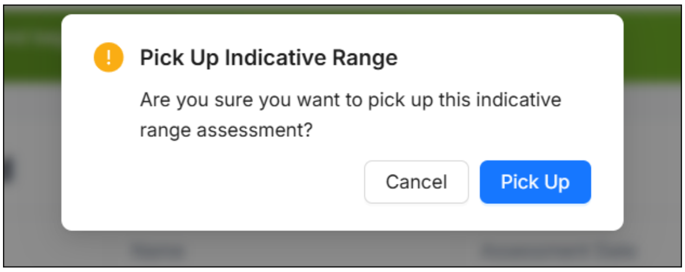
Status	Description	Actor
Continue Assessment	Keep working on the assessment.	Assessor
Start Moderation	Begin reviewing the assessment.	Allocator
Complete Moderation	Finish the review process and send to DSS.	Allocator
Ready for Indicative Range	DSS to start the Indicative Range step.	DSS
Continue Indicative Range	Start next stage of the Indicative Range process.	DSS/Allocator
Information Requested	Provide the missing information.	Assessor
Assess Approval Request	Manager to review the IR amount	Manager
MyDSS Funding Plan	Create or manage the funding plan in MyDSS.	Assessor/Allocator
Declined Assessment	Manager has declined the IR amount	Allocator

2.4.2 Picking up an Assessment

If an assessment has been assigned to you and is sitting in your *Action Required* section, you can pick it up by doing the following:

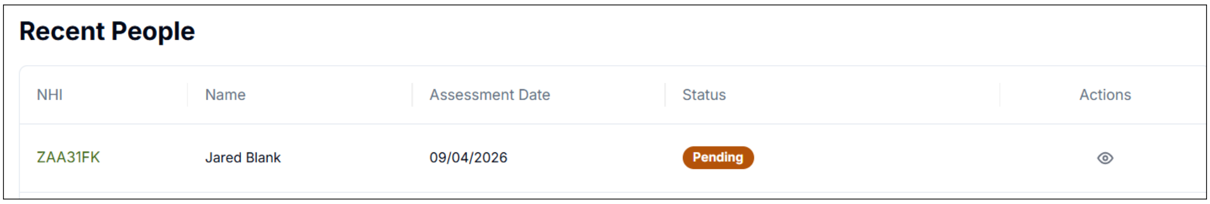
1. Click on the *Next Step* status next to the assessment in question:

2. A pop up will appear asking you to confirm; click **Pick Up:**



2.5 Recent People

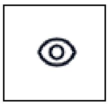
The *Recent People* section will display Disabled Persons that you recently interacted with. E.g. if you just completed an assessment or saved a partial assessment as a draft, you will be able to find and view these in the *Recent People* section:



Recent People

NHI	Name	Assessment Date	Status	Actions
ZAA31FK	Jared Blank	09/04/2026	Pending	

To view an assessment, click this icon:

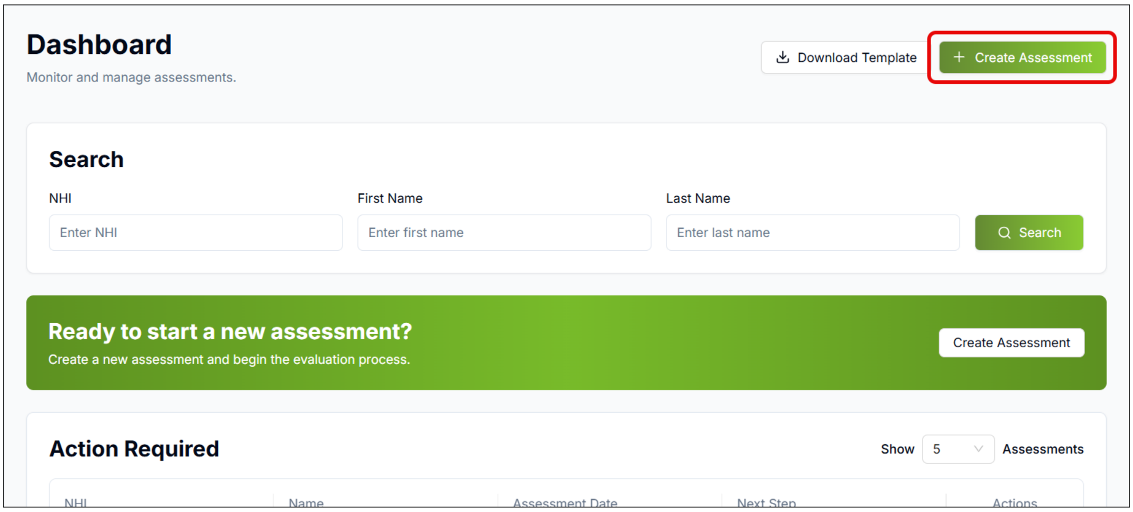


3 Assessor Creates an Assessment

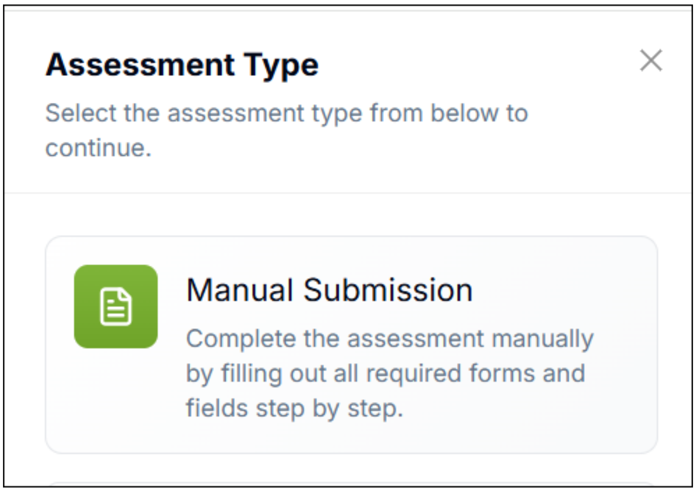
3.1 Assessment Creation

To create an assessment in OBIR:

1. On the *Dashboard* screen click **Create Assessment**:



2. An *Assessment Type* panel will slide open from the right. Click on **Manual Submission**:



3. On the *Create Assessment* screen, enter the following details in their respective fields:

    a. NHI of the Disabled Person

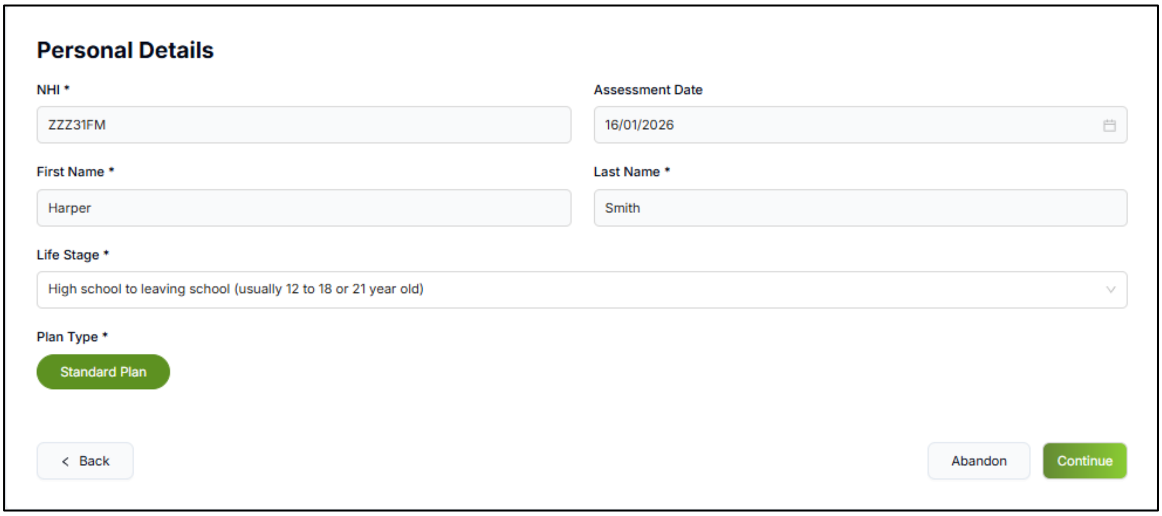
    b. Date of the Assessment

    c. Disabled Person's First and Last Name

    d. Select the Disabled Person's Life Stage from the dropdown (please note, this selection will determine what questions appear in the assessment)

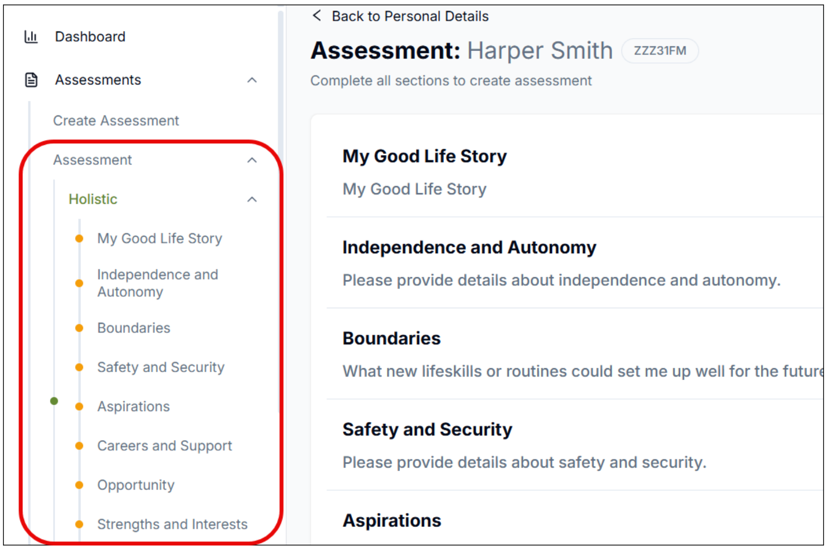
    e. Click **Standard Plan**

    f. Click **Continue**



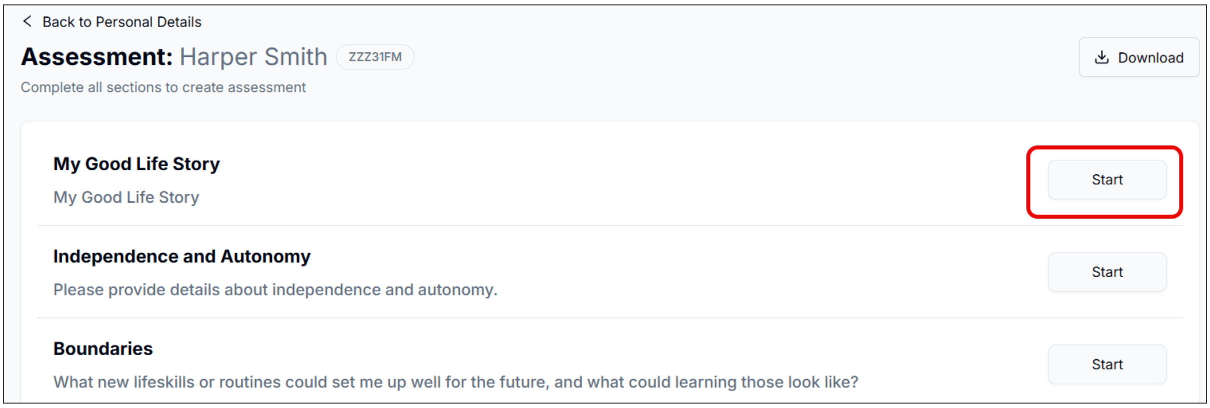
3.2 Holistic Section

When the Holistic Section opens, you will see all assessment sections displayed in the lefthand panel:

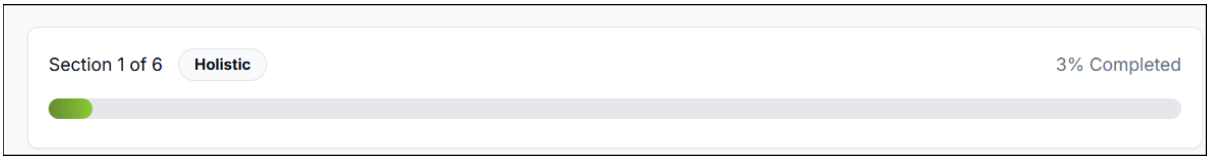


You will also see the different pages of the Holistic section displayed in the centre, with a **Start** button next to each stage.

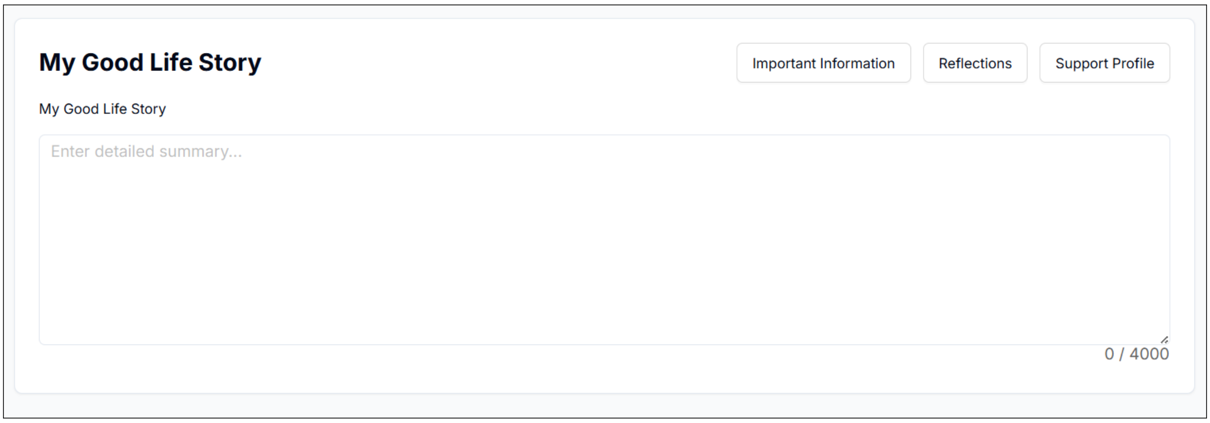
Click **Start** next to the desired page to enter information under that category:



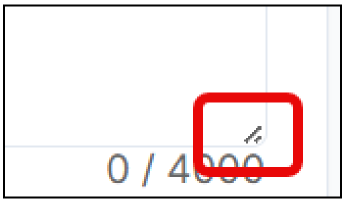
You will see a progress bar showing you how much of the assessment you have completed:



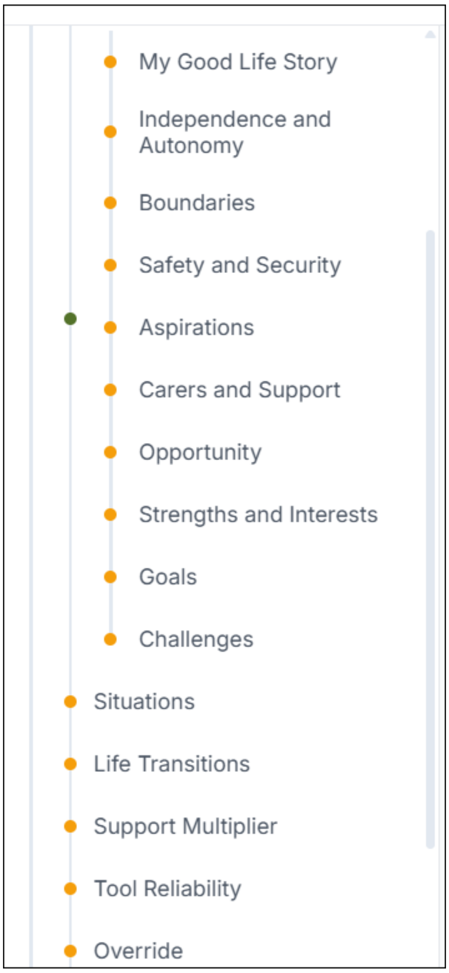
The question/topic will appear below with a free text field for you to type in details. E.g. for *My Good Life Story*, you should use the free text field to summarise the Disabled Person's account of what constitutes a good life for them:



If you wish to make the free text field bigger, click on the bottom right-hand corner and drag the field down:

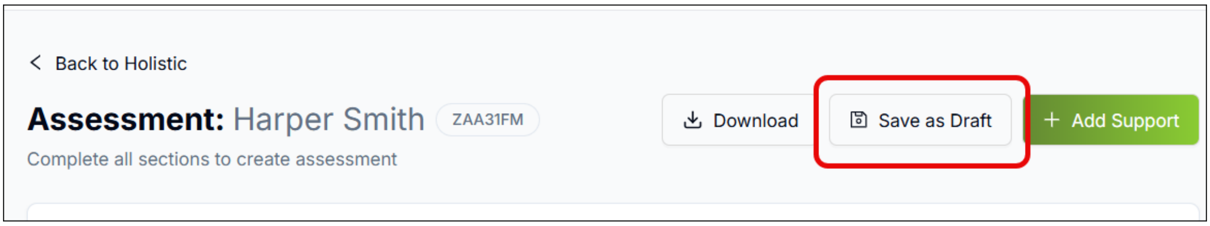


Once you're happy, click **Continue** to move to the next page or select the relevant section from the lefthand navigation panel:



You can then move through the Assessment, filling out each section and clicking **Continue** to proceed to the next section.

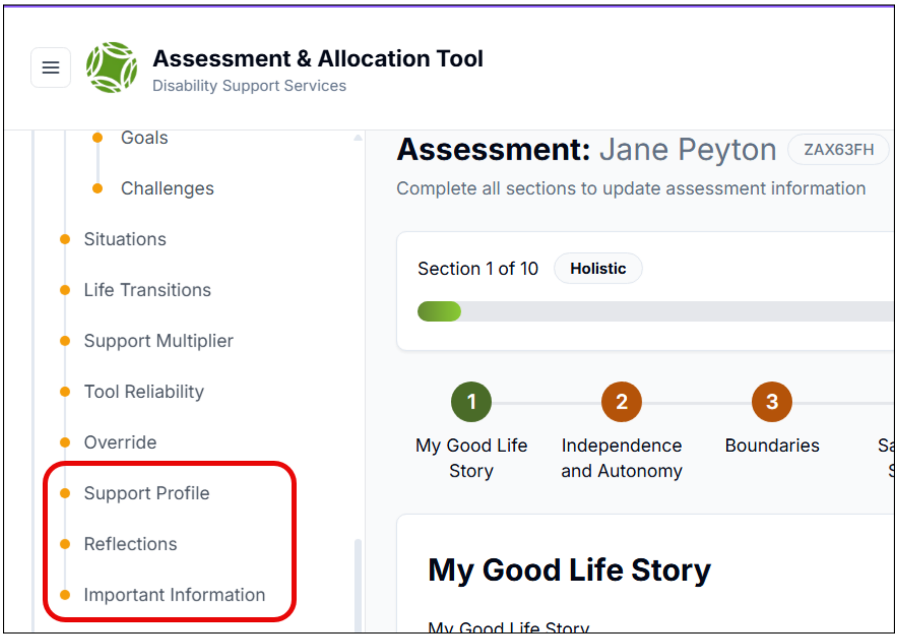
At any stage, you can click **Save as Draft** to save the Assessment and come back to it later:



3.3 Important Information, Reflections and Support Profile Sections

In addition to answering the questions within the *Holistic* Section, you can at any point add information by using the *Important Information*, *Reflections* and *Support Profile* sections.

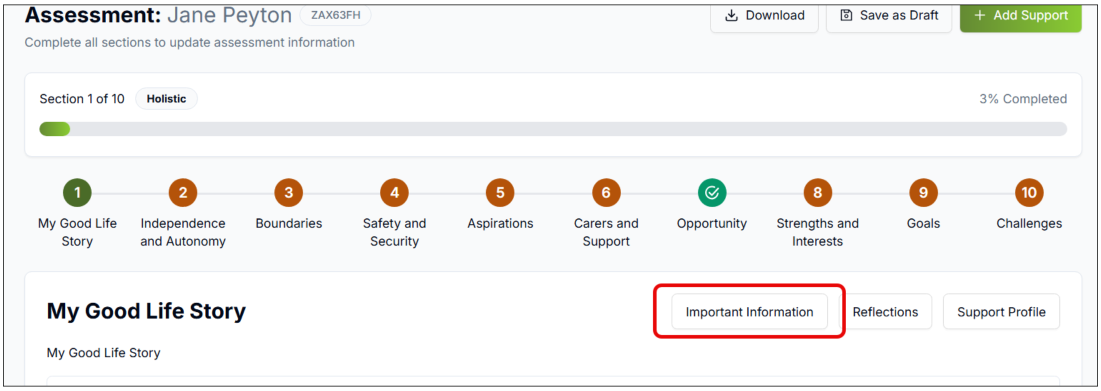
While you can add these from pages of the *Holistic* section, you can also answer and view all of your responses for each section collated together by clicking the respective option in the lefthand panel:



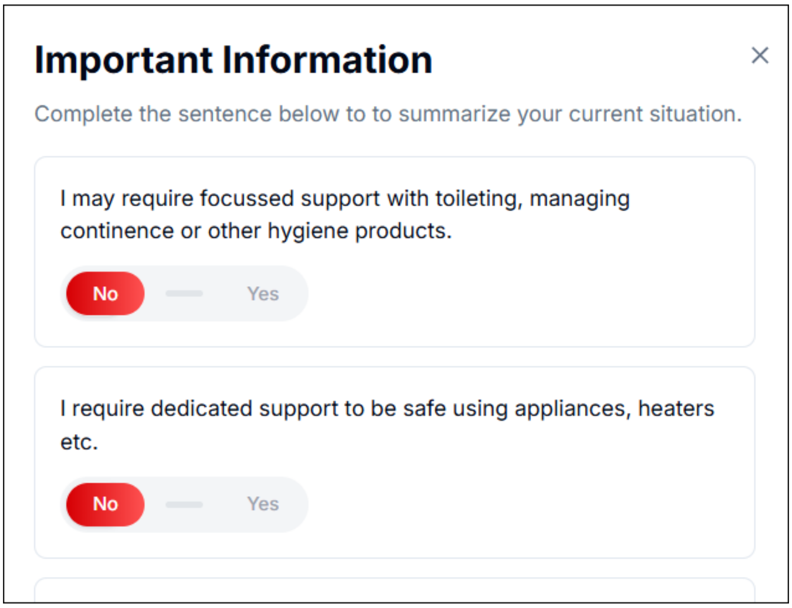
3.3.1 Important Information

To record important information:

1. Click the **Important Information** tab which you will find on certain pages of the *Holistic* section:



2. The *Important Information* panel will slide open from the right, enabling you to select the appropriate responses:



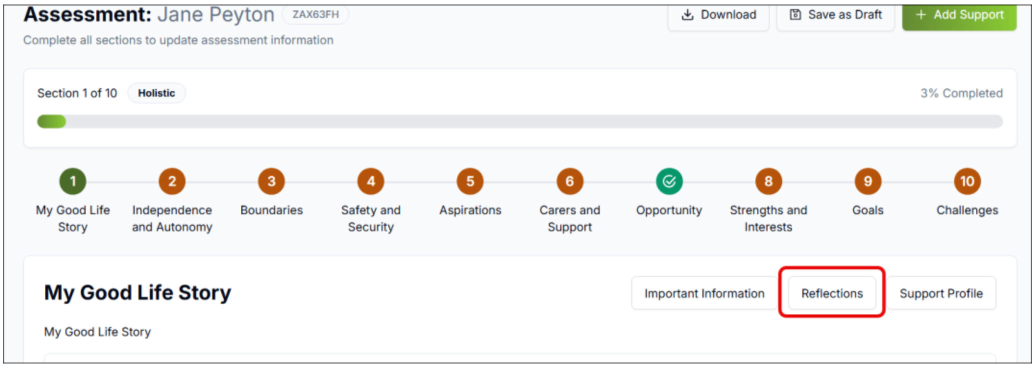
3. Once done, click **Save**

As you proceed through the Assessment, you can click on the **Important Information** tab on any page where it is located to add information relevant to that page.

3.3.2 Reflections

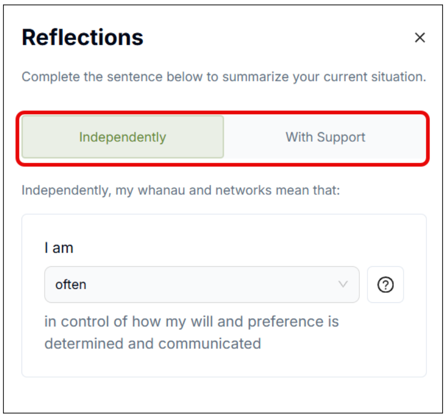
To record reflections:

1. Click the **Reflections** tab which you will find on certain pages of the holistic section:

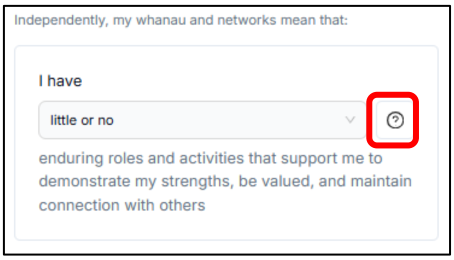


2. The *Reflections* panel will slide open from the right, enabling you to select the appropriate responses

3. There are two tabs with questions to answer (*Independently* and *With Support*):



4. If unsure how to answer, click the question mark icon to open the *Help* section for that particular question:



5. In the *Help* section, in each of the three tabs (Signalling/Sustaining/Strengths), select the statement which is the most appropriate, then click **Close**:

6. The system will automatically populate an answer based on your three selections; however, you can update the answer if required

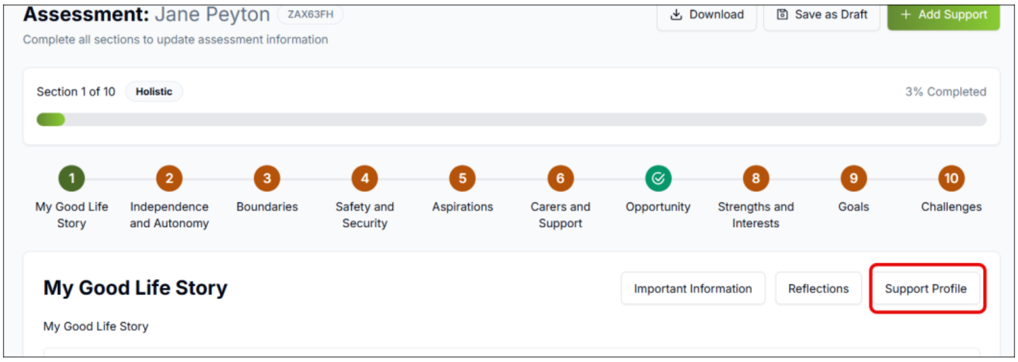
7. Once all answers have been entered, click the **X** to close the *Reflections* tab and the information will save automatically.

As you proceed through the Assessment, you can click on the **Reflections** tab on any page where it is located to add information relevant to that page.

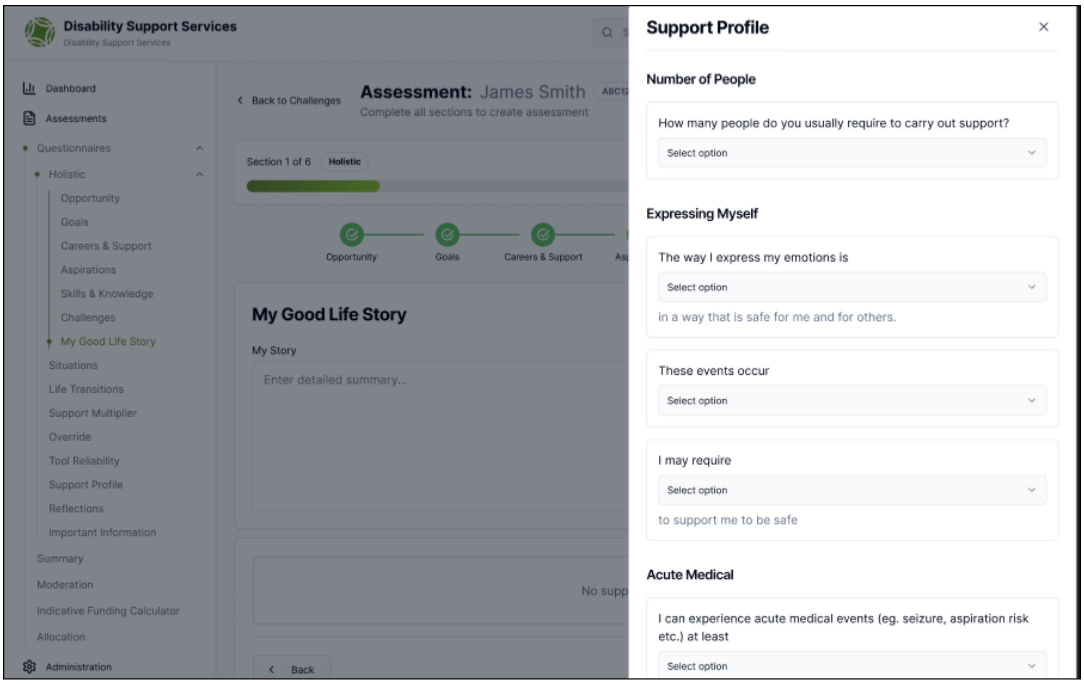
3.3.3 Support Profile

To record the Disabled Person's support profile (i.e. details around the level of support they might require in order to keep them safe):

1. Click the **Support Profile** tab which you will find on the first page of the Holistic section:



2. The *Support Profile* panel will slide open from the right. Select the answers to the questions from the respective dropdown list:



3. Once done, click **Complete**

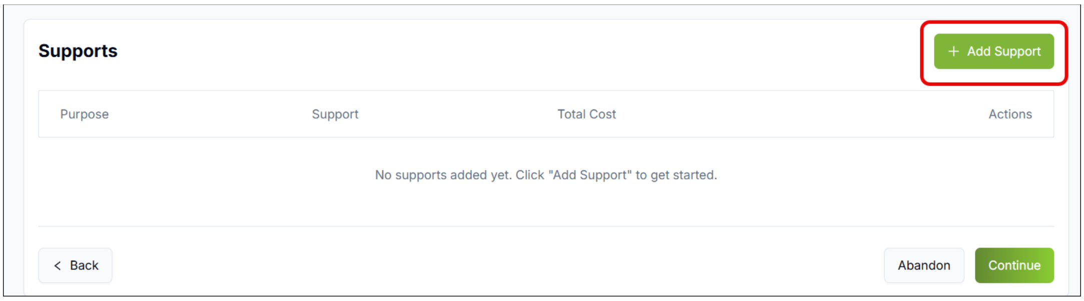
As you proceed through the Assessment, you can click on the **Support Profile** from the lefthand navigation to enter information.

3.3.4 Support

You can add supports to the Disabled Person's *My DSS Funding Plan* from the Holistic section. The information recorded here will be included within the calculation of support costs within the funding plan.

To add a support:

1. On any page of the *Holistic* section, click **Add Support**:



2. The *Support* panel will slide open from the right. Here you can record the following details:

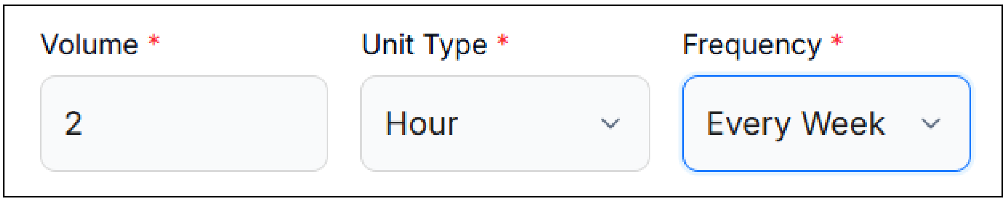
   a. Select the appropriate 'Area' for the support which captures the support category.

   b. The purpose of the support (i.e. whether it is to help with the Disabled Person's daily routine, life skills, or communication, etc.)

   c. The support statement, e.g. *Someone to take me to my afterschool activities*

   d. The start and end dates of the required support

   e. The Volume, Unit Type and Frequency of the support. In this context, Unit Type refers to hours, days, weeks, etc. and the Volume determines how many of these are required. E.g. if you select Volume = 2, Unit Type = Hours, and Frequency = Every Week, that means the Disabled Person requires the support for two hours every week:



f. The Unit Cost. This is the cost for each unit type you have selected. E.g. if you selected 2 hours every week, the Unit Cost will be the cost for one of those hours. Please note, if you don't yet know the costs, you can just put placeholder values for now (these can then be updated when completing the My DSS Funding Plan

g. Total Cost. This is automatically calculated by the system and is the total of all unit costs within the support date range you specified

h. Annualised Cost. This is how much the support will cost per year (automatically calculated by the system)

i. Who the support will be managed by

3. The *Office Use Only* section will typically be filled out later on so you can leave this part blank for now. If you are filling it out, use the respective fields as follows:

    a. The Purpose Code is prepopulated

    b. Add the categorisation

    c. Mark whether the support is jointly funded

    d. The percentage will be prepopulated and is relevant to self-managed host support lines only

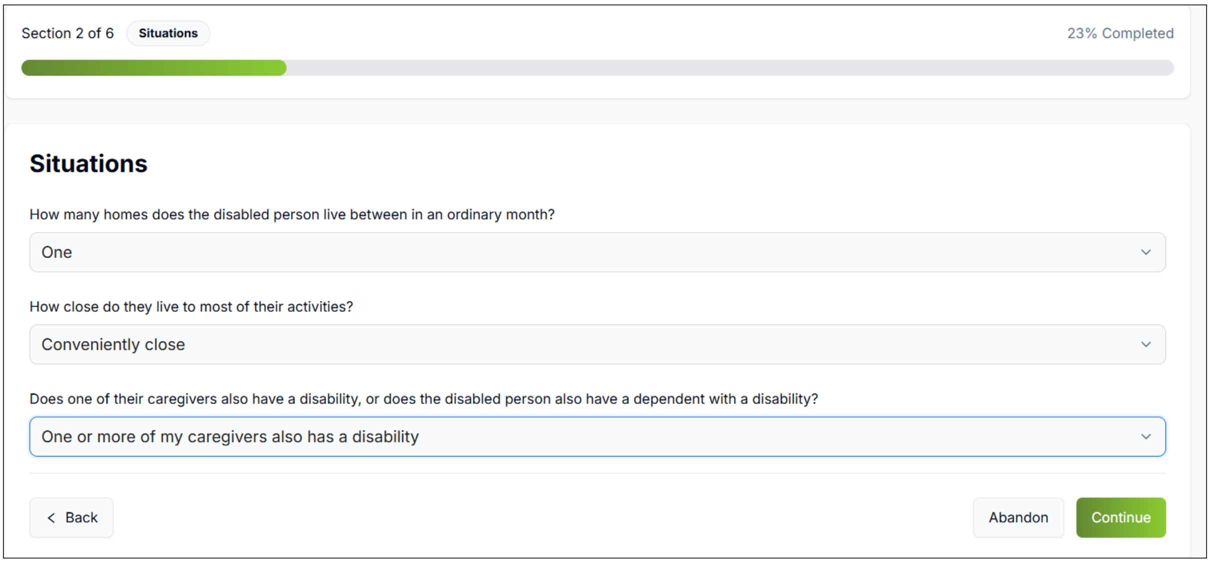
4. Once you are done, click **Add Support**

You can see any supports you add in the *Supports* section on each page of the Holistic section:

They will also be visible in the My DSS Plan which can be generated once the assessment has been completed and an indicative funding range recorded.

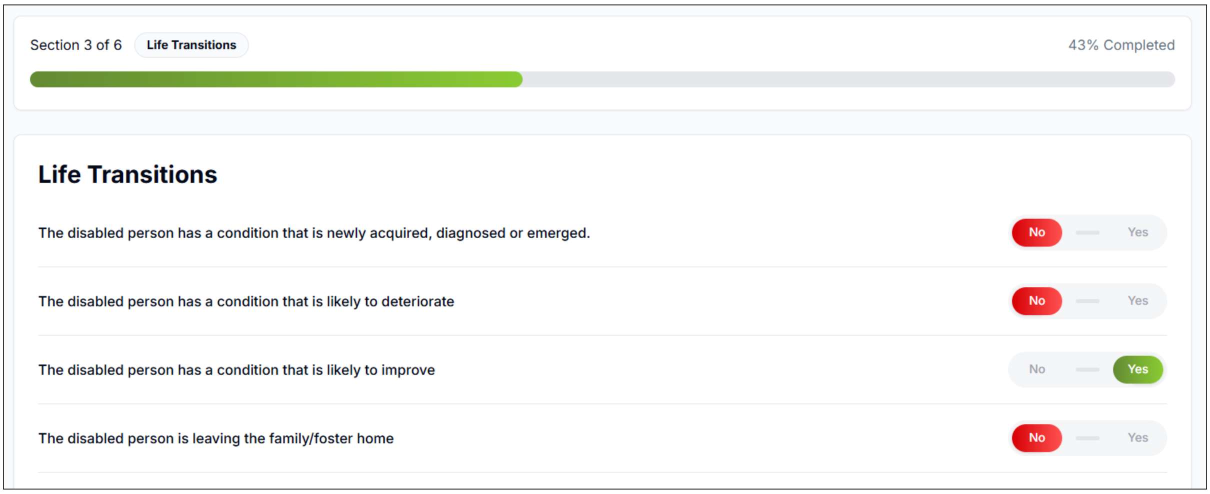
3.4 Situations

Once the Holistic section is complete, the next section is *Situations*. Depending on the life stage chosen, there are between three to five questions to answer. Select the appropriate responses and click **Continue**:



3.5 Life Transitions

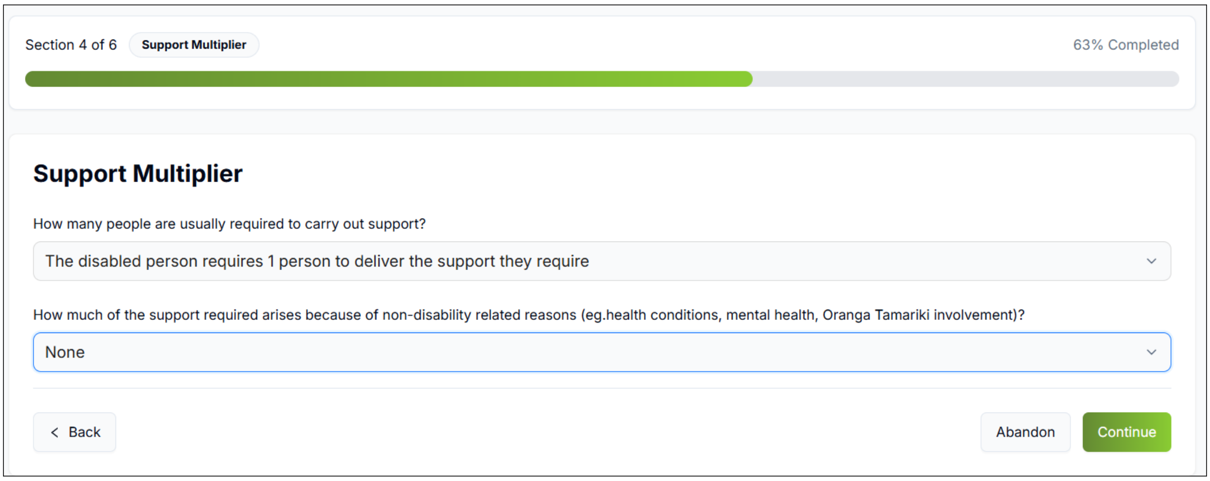
Answer the questions in the *Life Transitions* section by clicking **Yes** or **No** next to each. If the question is not appropriate or the person does not wish to answer, leave the selection blank:



Once you are happy, click **Continue.**

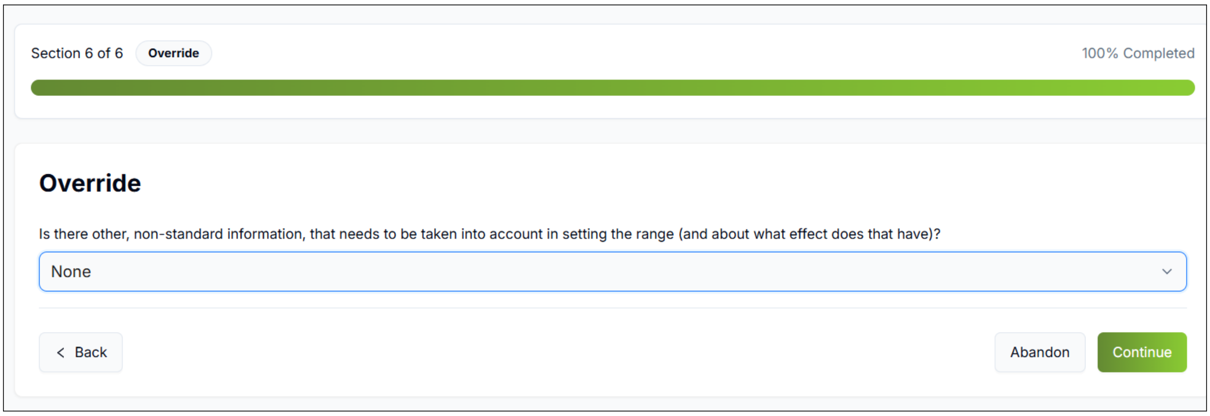
3.6 Support Multiplier

On the *Support Multiplier* page, select the appropriate responses and click **Continue**:



3.7 Override

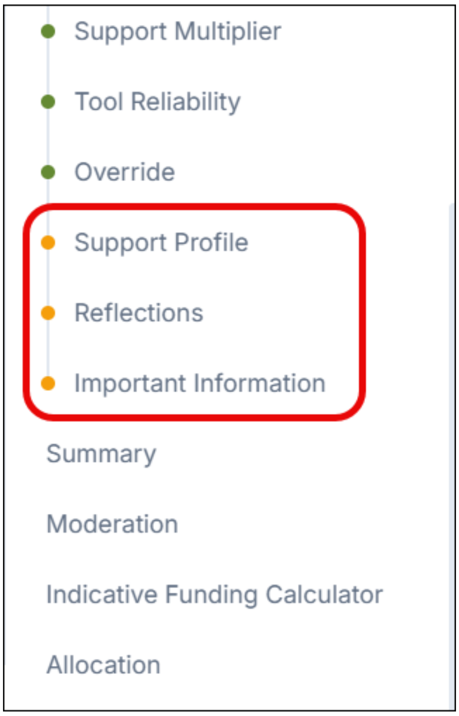
On the *Override* page, select the appropriate response and click **Continue**:



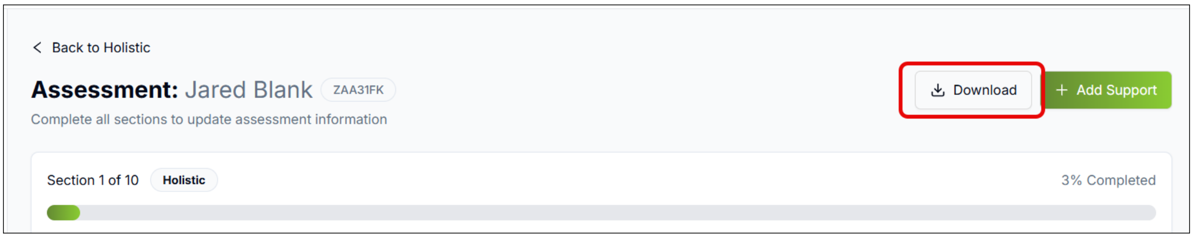
3.8 Summary

Once you click **Continue** on the *Override* page, the application will take you straight to the *Summary* page, where you can view the information you recorded in the *Important Information*, *Reflections*, *Support Profile*, and *Support* sections.

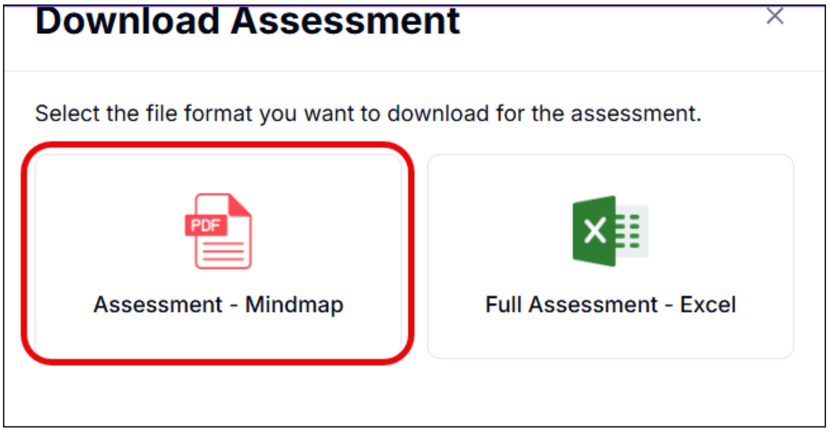
If you wish to revisit any of these sections and update your answer, you can click on them in the left-hand panel:



Once all information has been entered into the assessment, you can download the assessment by clicking the **Download** button which is available on all assessment screens from *My Good Life Story* to *Summary*:



There are two download options: Download as a PDF Mind-map, or Download as an Excel file. To proceed, click the appropriate option:

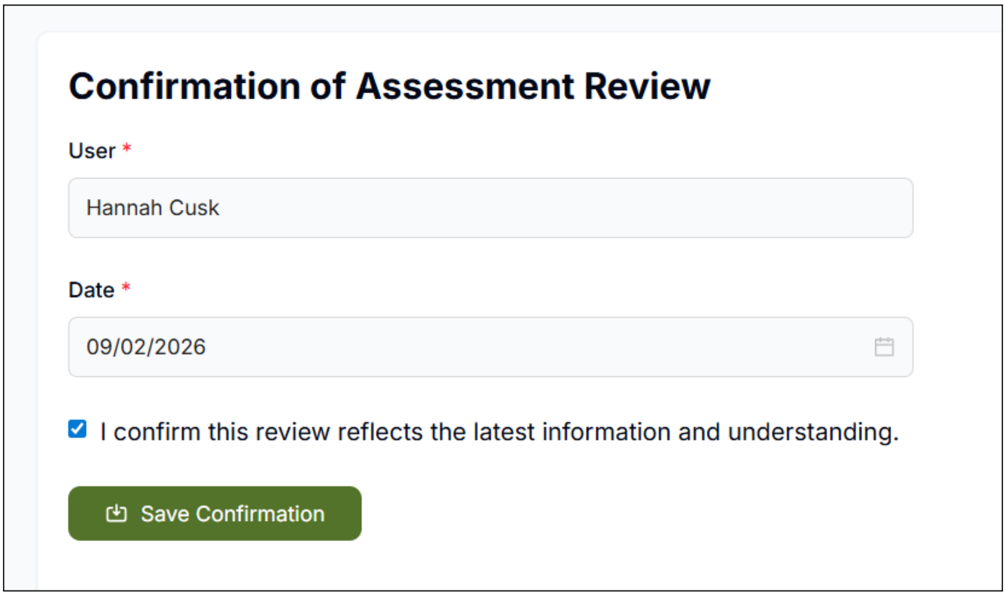


Downloaded assessments can be printed/emailed to the Disabled Person for confirmation the information is complete and correct.

Once the Disabled Person is happy with the summary, mark the *Disabled Person Confirmation* as yes and click **Continue to Moderation**:

3.9 Moderation (Confirmation of Assessment Review)

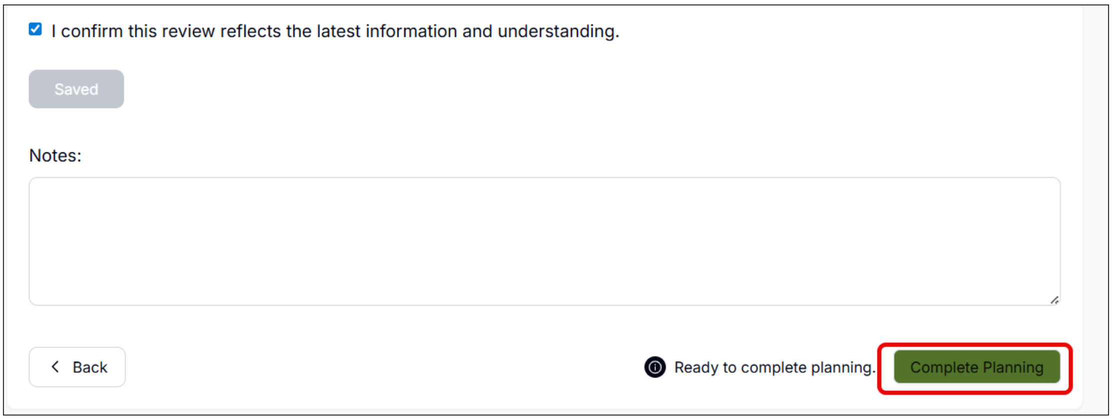
On the *Moderation* page, complete the Confirmation of Assessment by entering your name and the date of the assessment review, marking the checkbox, and clicking **Save Confirmation**:



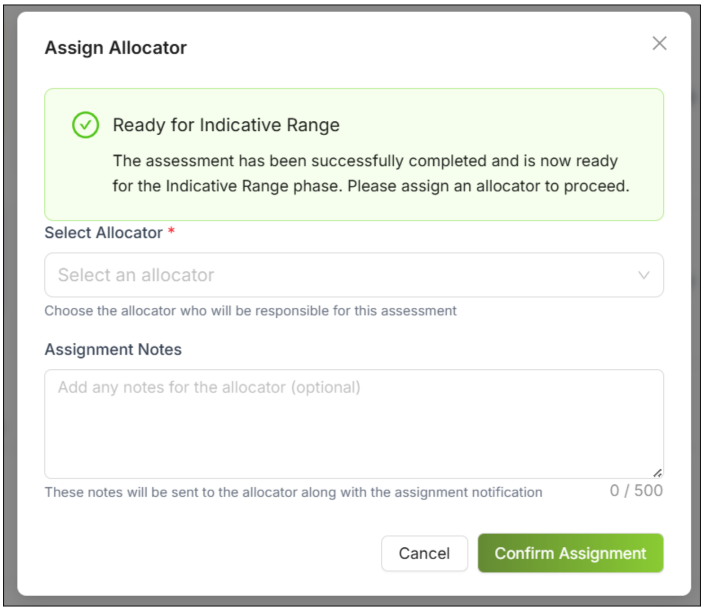
You can also add notes in the *Notes* field.

To complete the assessment:

1. Click **Complete Planning**:



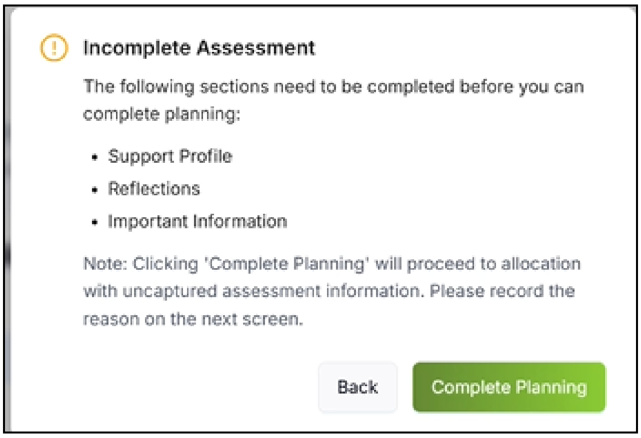
2. In the pop up, select the Allocator you want to assign this assessment to. You can also add assignment notes if you wish for the Allocator's attention. If you have both Assessor and Allocator roles, you can assign the assessment to yourself to continue:



3. Once you are happy, click **Confirm Assignment**

3.9.1 Incomplete Assessments

If you click **Complete Planning** and information is missing from the assessment, you will see a pop up appear:



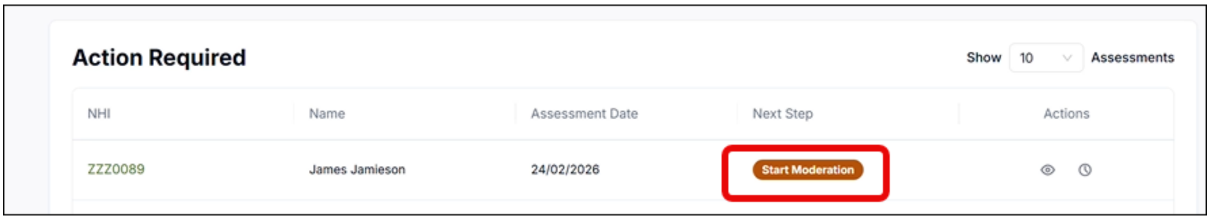
If you want to complete the assessment anyway, simply click **Complete Planning.** On the next screen, document the reason for incomplete answers in the *Notes* field, e.g. "Disabled person did not wish to answer".

However, if you want to go back and review and/or fill in the missing sections, click **Back.** This will take you back to the first section where information is missing, e.g. *Support Profile*. You can then proceed through them, fill in the information, and click **Complete Planning** on the *Moderation* page again once you are done.

4 Allocator Reviews the Assessment

4.1 Picking up an Assessment

As an Allocator, if an assessment is assigned to you, you will see it appear in your *Action Required* section on the *Dashboard* with a status of *Start Moderation:*



To pick up that assessment:

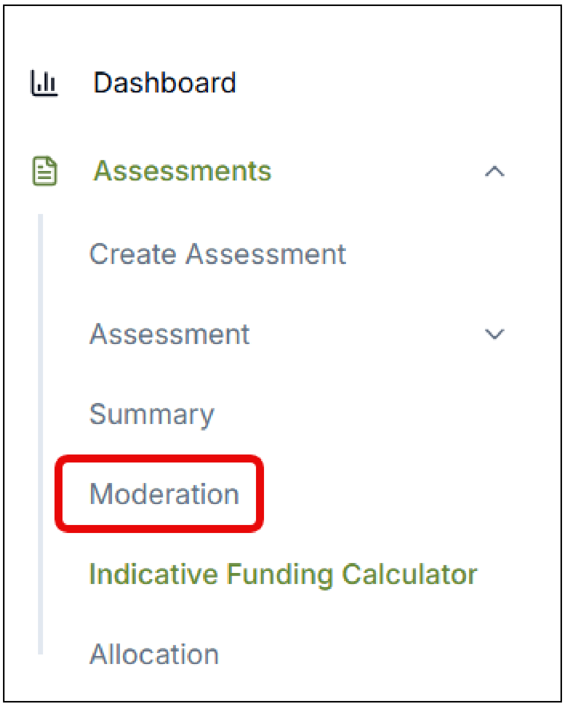
1. Click on the **Start Moderation** status

2. A pop up will appear asking you to confirm; click **Pick Up**

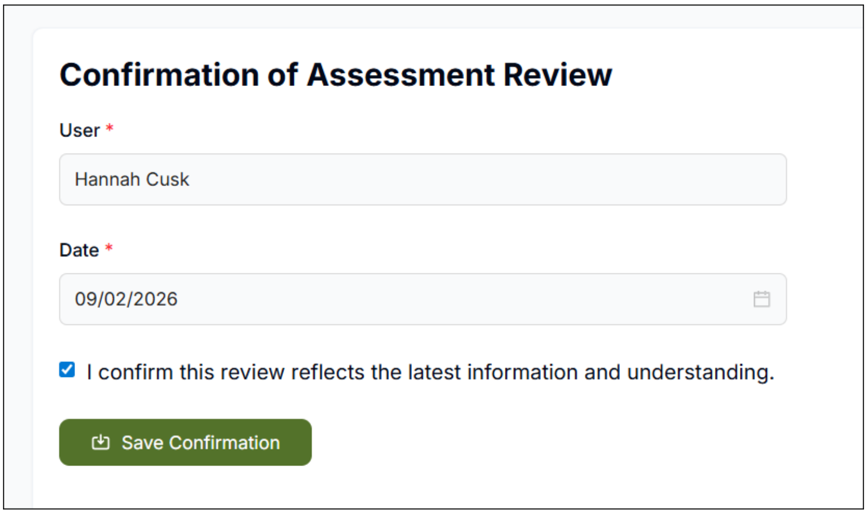
3. The assessment will open on the *Moderation* screen where you can easily navigate through the assessment to review the recorded information

4.2 Moderating the Assessment

You should review the assessment information and confirm this assessment is ready for indicative range. Once you are happy with your review, click **Moderation** in the left-hand panel:



Here you will see the Confirmation of Assessment Review as completed by the Assessor (you will see the Assessor's name and the date of assessment review):

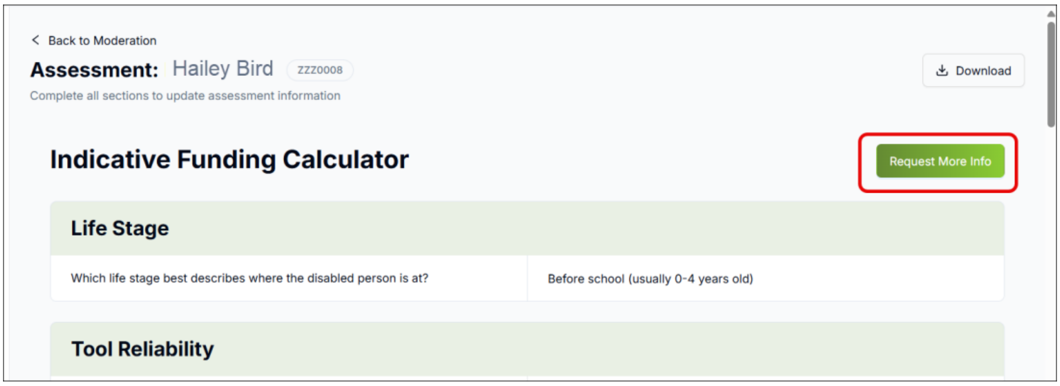


1. Replace the Assessor's name in the *User* field with your own name
2. Enter the date of your review in the *Date* field
3. Ensure the checkbox is marked and click **Save Confirmation**

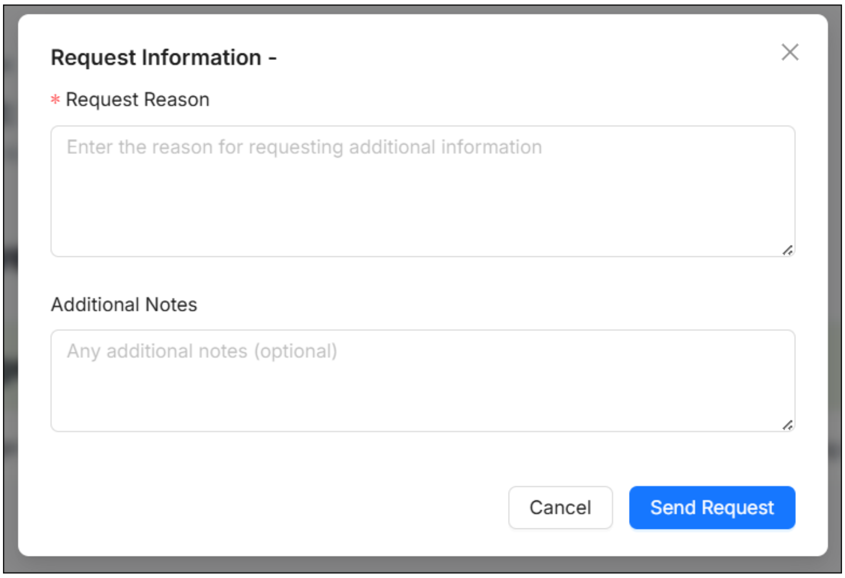
4.3 Requesting More Information

If you require more information from the Assessor who filled out the assessment:

1. On the *Indicative Funding Calculator* screen, click **Request More Info**:

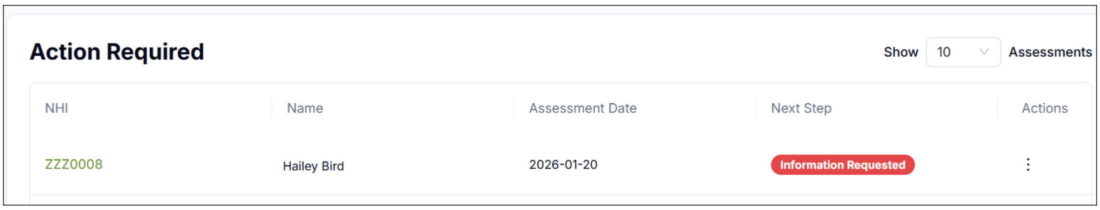


2. In the pop up that opens, type in the *Request Reason*. You can also enter additional notes for the Assessor if you wish:



3. Click **Send Request**

4. The assessment will then appear in the Assessor's *Action Required* section with a status of *Information Requested*:

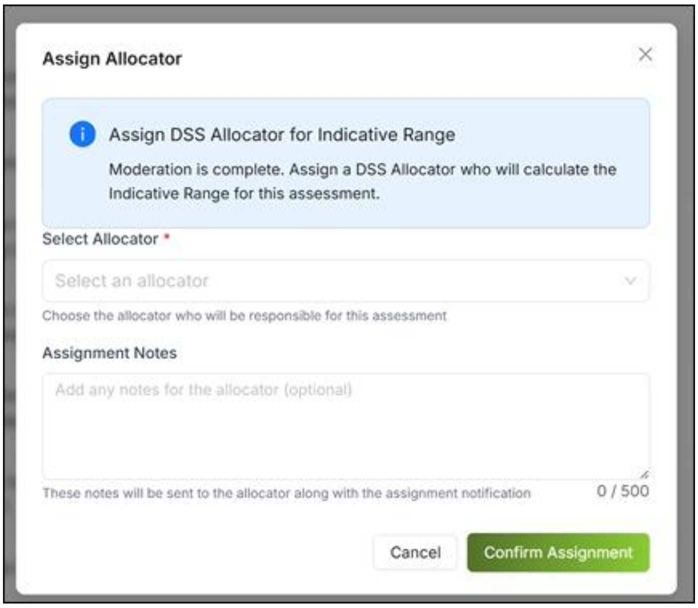


4.4 Assigning the Assessment to DSS

Once you have completed the Confirmation of Assessment Review, you should assign the assessment to the DSS Allocator who will complete the indicative funding range.

1. On the *Indicative Funding Calculator* screen, click **Assign DSS Allocator:**

2. In the pop up that opens, select the required DSS Allocator
3. Enter any notes for the Allocator in the *Assignment Notes* field (optional)
4. Once happy, click **Confirm Assignment:**



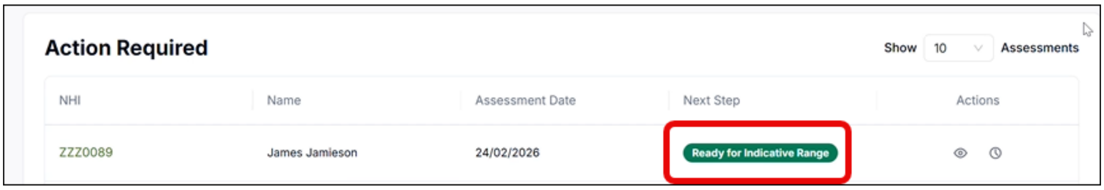
5 DSS Allocator Exports Assessment Results for Indicative Funding Calculation

Once an assessment is complete, the DSS Allocator can export the results or copy and paste them to support calculating the indicative funding range. Indicative range calculation is currently done through Excel.

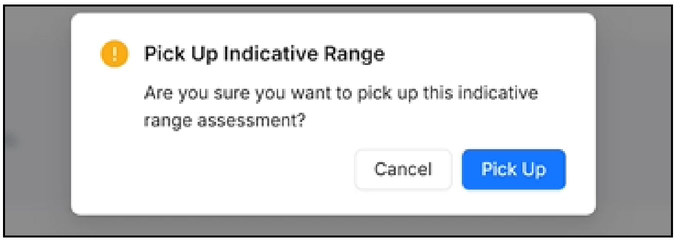
To export the results:

1. Find the assessment on your *Dashboard*

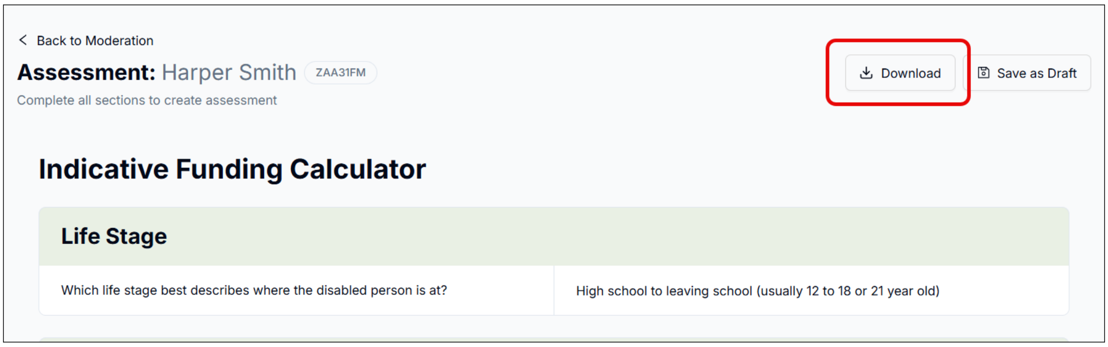
2. Click on the **Ready for Indicative Range** status next to the assessment:



3. A pop up will appear: click **Pick Up:**



4. On the *Indicative Funding Calculator* page, click **Download**:



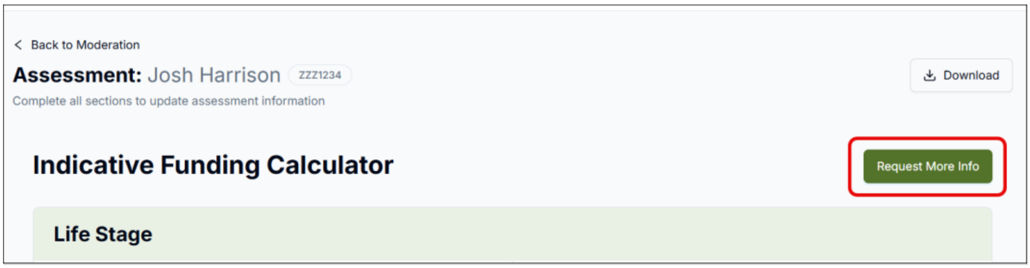
5. This will download a file which you can use to copy information into Excel.

5.1 Requesting More Information

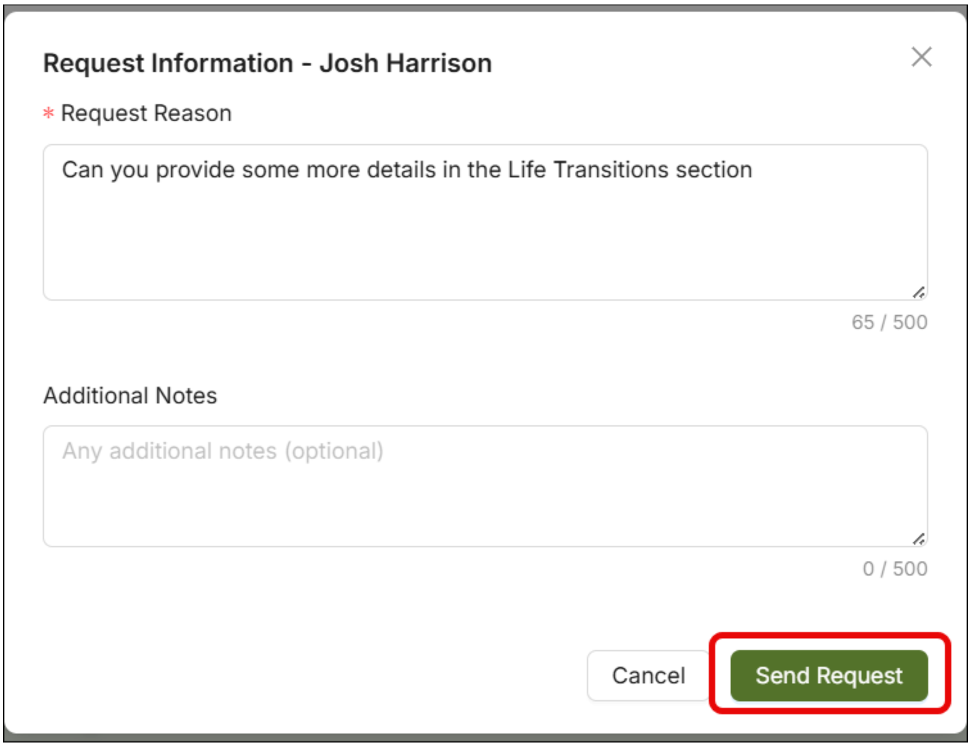
As a DSS Allocator, if you require more information from the Assessor who filled out the assessment:

1. Open the assessment

2. On the *Indicative Funding Calculator* screen, click **Request More Info**:



3. This will open a pop up where you can explain what information you are looking for by typing details in the *Request Reason* field. Once you are done, click **Send Request**:



6 Managing the Indicative Funding Range in OBIR

Typically, the Indicative Funding Range will be calculated in Excel and recorded in OBIR by a DSS Allocator. An Allocator will then review the range and apply any adjustments that may be necessary.

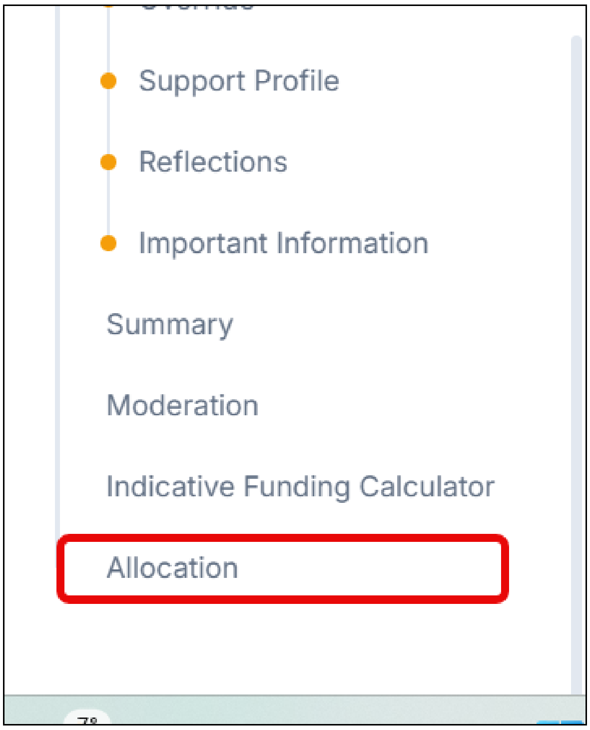
6.1 DSS Allocator Records the Funding Range in OBIR

To enter your Indicative Funding Range in OBIR:

1. Go to OBIR and find the assessment in the *Assessments* screen or from your *Dashboard*, either via the *Action Required* or *Recent People* section

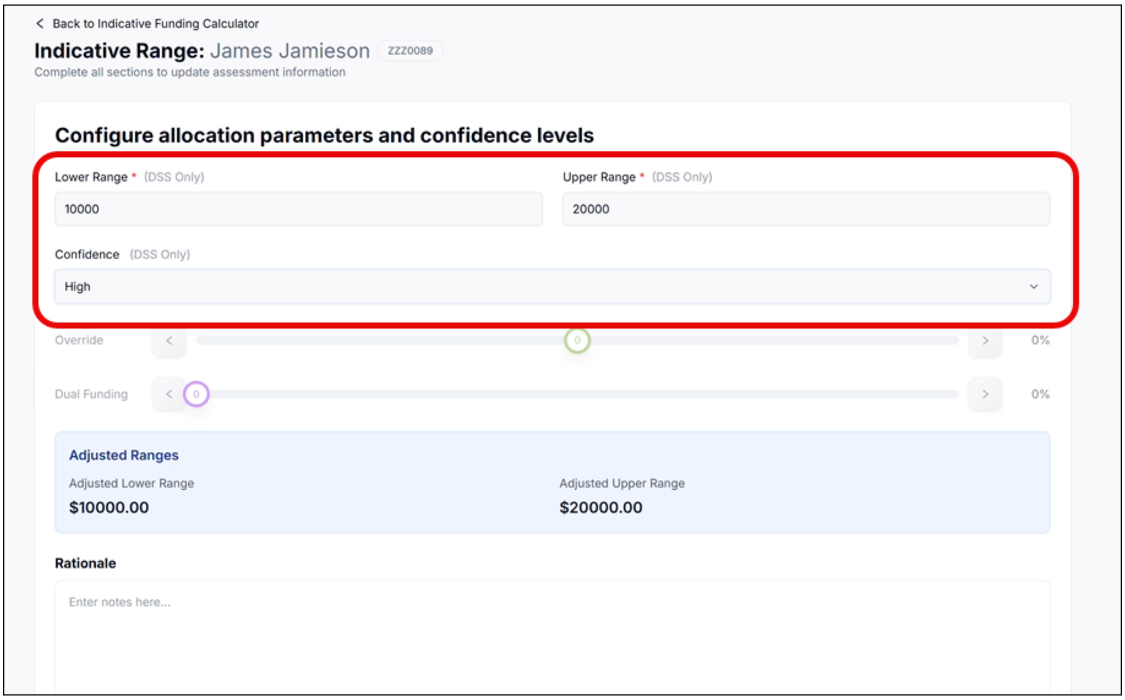
2. Open the assessment by clicking on the status

3. Click **Allocation** in the left-hand menu:



4. Record the lower and upper limits of the funding range in their respective fields

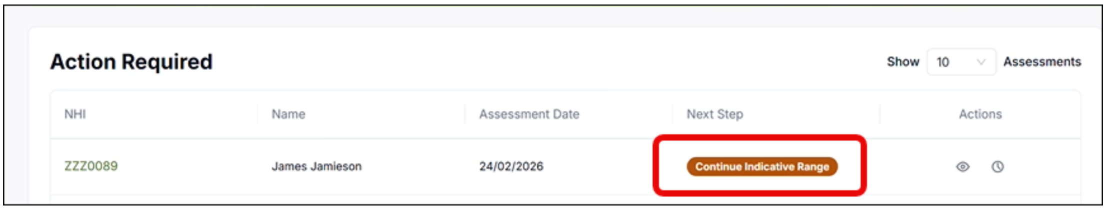
5. Record your confidence level in your range assessment:



6. Click **Complete Indicative Range** to assign the assessment back to the Allocator:

6.2 Allocator Reviews the Funding Range

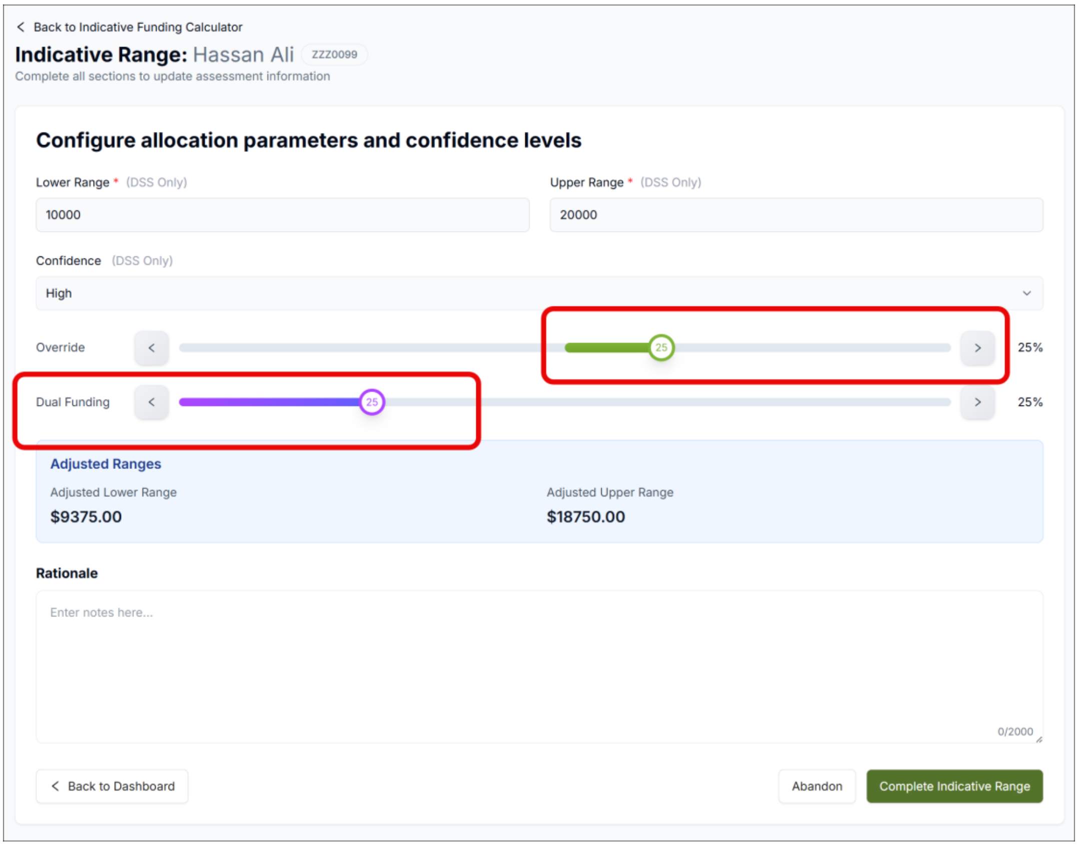
1. Find the assessment in your *Action Required* section on the *Dashboard* and click on the status **Continue with Indicative Range:**



2. You will see the Lower Range and Upper Range as recorded by the DSS Allocator

3. You can override the given indicative range by a defined percentage of the range. E.g. if you set the slider to 25%, it will add 25% to both lower and upper ranges. Use the slider to select the appropriate percentage

4. You can also use the *Dual Funding* slider to update the amount of funding that will be covered by another funder. E.g. if you move the slider to 25%, that means 25% of the funding will be paid by another funder, so the system will automatically adjust the lower and upper funding ranges to 75% of the previous values:



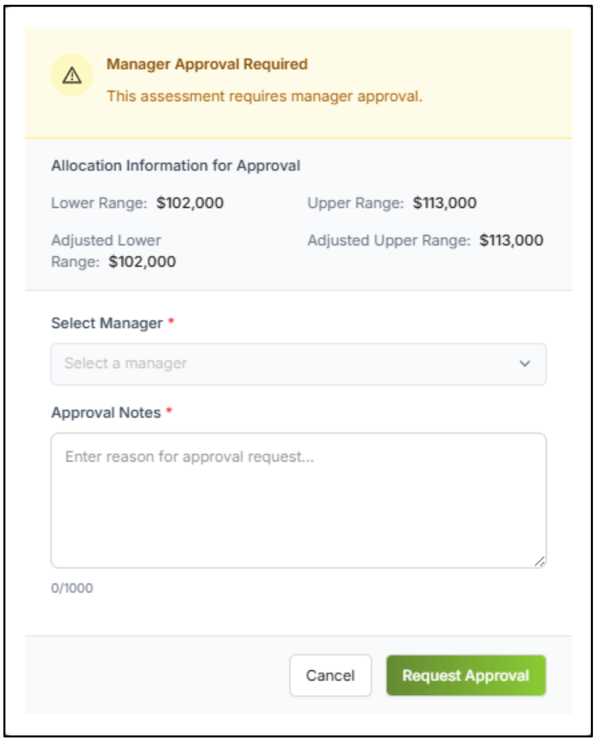
5. The adjusted ranges will be displayed below

6. Type your rationale for changes to the funding range in the *Rationale* field.

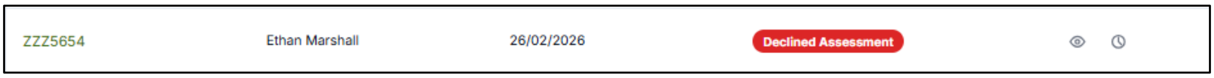
7. Once you are happy, click **Complete Indicative Range**:

8. If the override slider or dual funding slider is used or the Indicative Range is greater than $112,000, this will trigger a *Manager Approval Request* pop up

9. If that happens, assign a Manager using the *Select Manager* dropdown, and enter notes for the Manager to review. Then click **Request Approval:**



10. If the Manager declines the Indicative Range it will appear in your *Action Required* section with a status of *Declined Assessment*:

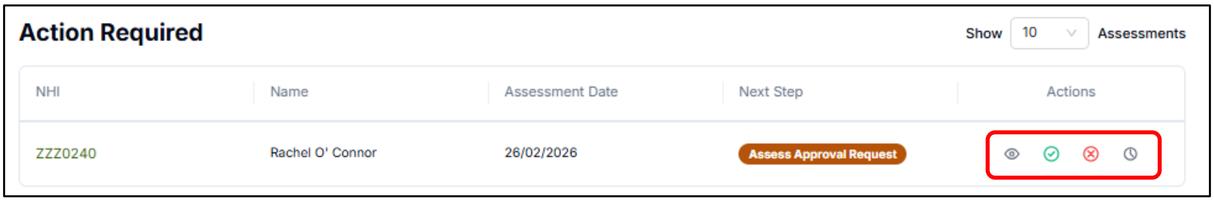


11. Click the **Clock** icon to review the Manager's comments

12. Repeat steps from 3.4 onwards until the manager approves the Indicative Range.

6.3 Manager Approval

1. When an assessment is assigned to you as a Manager for approval, it will appear in your *Action Required* section with a status of *Assess Approval Request*:



2. Click the **Eye** icon to view the assessment information
3. To approve the Indicative Range amount, click the green **Tick** icon

4. You can add notes to the approval if required

5. To decline the Indicative Range, click the red **X** icon.

6. You must add notes to the declined Indicative Range

7. Declining or approving an Indicative Range will automatically send the assessment back to the Allocator with the appropriate status

7 Notifications

Email notifications will be automatically generated by the web-app during certain steps of the assessment and allocation process.

Notifications to **Assessors** are generated when:

a. More information has been requested by the Allocator

b. An Allocator has completed the Indicative Range

c. An Indicative Range requires a Manager Approval

d. The Manager has approved or declined the Indicative Range

Notifications to **Allocators** are generated when:

a. When the Indicative Range has been entered by DSS

b. When the Indicative Range has gone to the Manager for review

c. When the Manager approves or declines the Indicative Range

Notifications to **Managers** are generated when:

a. An Indicative Range requires approval

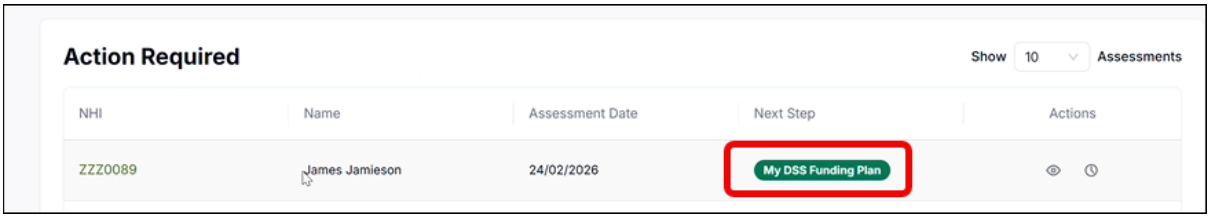
8 My DSS Funding Plan

8.1 Overview

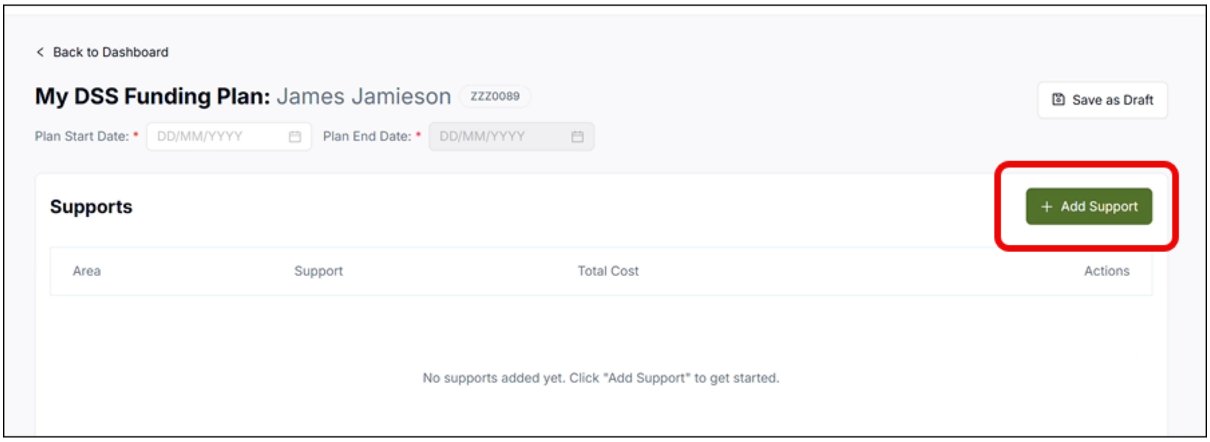
Following completion of the assessment and indicative funding range, the Assessor or Allocator can launch the Disabled Person's My DSS Funding Plan which will encompass the supports required, the costs of those supports, and whether the total cost falls within the indicative funding range.

To do so, the Assessor or Allocator can pick up the assessment from their *Actions Required* section on the *Dashboard*.

Click on the **My DSS Funding Plan** status next to the assessment:



On the My DSS Funding Plan main page, you will see any supports that were added when carrying out the assessment. You can edit any of previously added supports, or you can add a new support:



8.2 Adding a Support

When adding a support, you can capture:

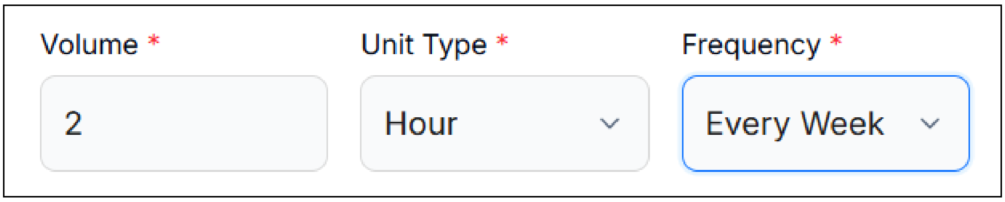
1. The appropriate 'Area' for the support which captures the support category.

2. The purpose of the support (i.e. whether it is to help with the Disabled Person's daily routine, life skills, or communication, etc.)

3. The support statement e.g. *Someone to take me to my afterschool activities*

4. The start and end dates of the required support

5. The Volume, Unit Type and Frequency of the support. In this context, Unit Type refers to hours, days, weeks, etc. and the Volume determines how many of these are required. E.g. if you select Volume = 2, Unit Type = Hours, and Frequency = Every Week, that means the Disabled Person requires the support for two hours every week:



6. The Unit Cost. This is the cost for each unit type you have selected. E.g. if you selected 2 hours every week, the Unit Cost will be the cost for one of those hours

7. Total Cost. This is automatically calculated by the system and is the total of all unit costs within the support date range you specified

8. Annualised Cost. This is how much the support will cost per year (automatically calculated by the system)

9. Who the support will be managed by

In the office use only section:

10. The Purpose Code is prepopulated

11. Add the categorisation

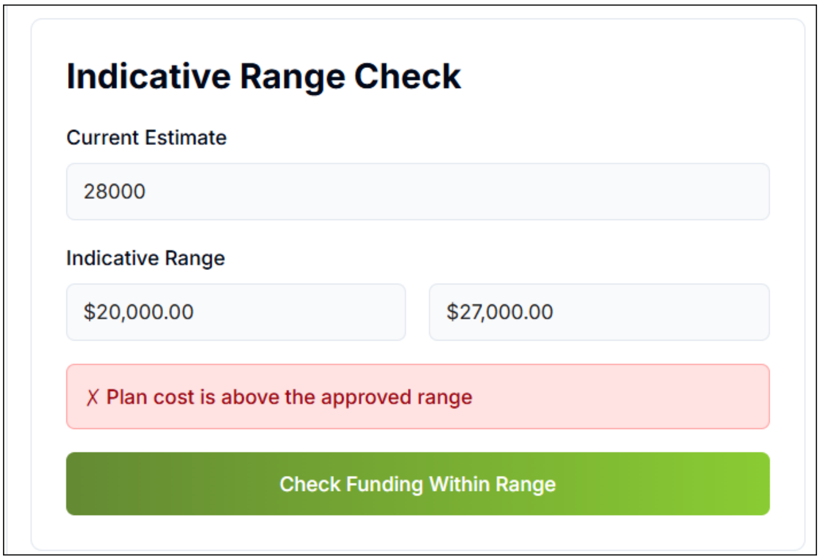
12. Mark whether the support is jointly funded

13. The percentage will be prepopulated and is relevant to self-managed host support lines only

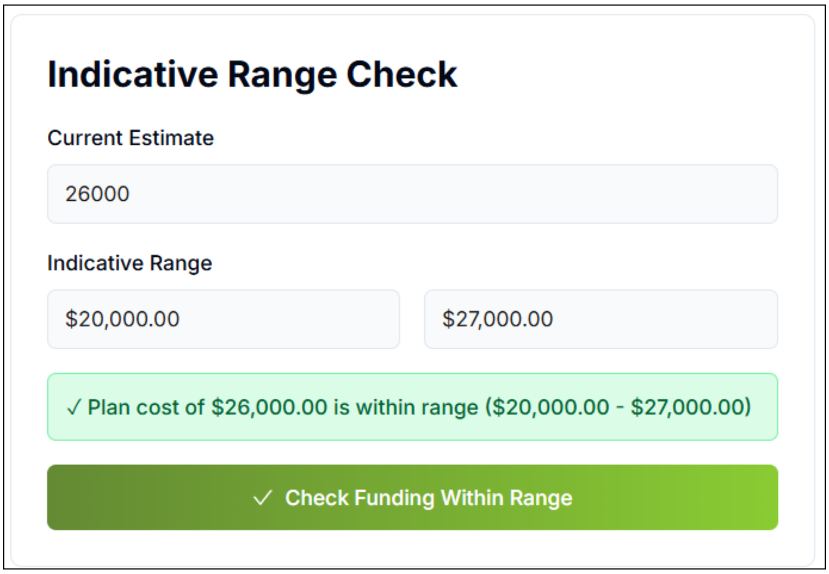
14. Once you are done, click **Add Support**

8.3 Support Costs Calculation

The system will calculate the sum of all the supports' total costs and automatically populate the *Current Estimate* field. Click **Check Funding Within Range** and if the current estimate is greater than the indicative funding range, you will see an alert appear:



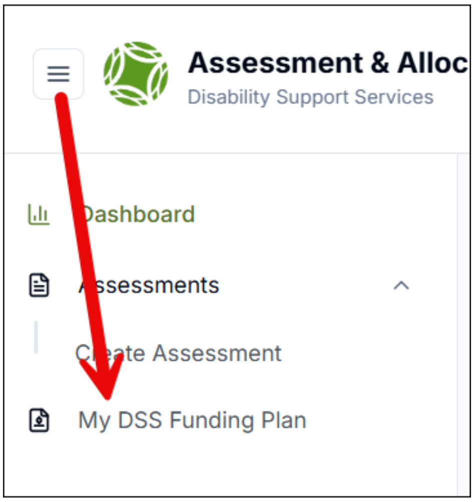
If it is within the range, you will see a confirmation that it is within range appear:



8.4 Saving the Funding Plan as a Draft

You can save the My DSS Funding plan as a draft by clicking the **Save as Draft** button.

The plan will need the start date and end date entered to successfully save. You can now view the plan in the My DSS Funding Plan section, which you can open from the left-hand panel:

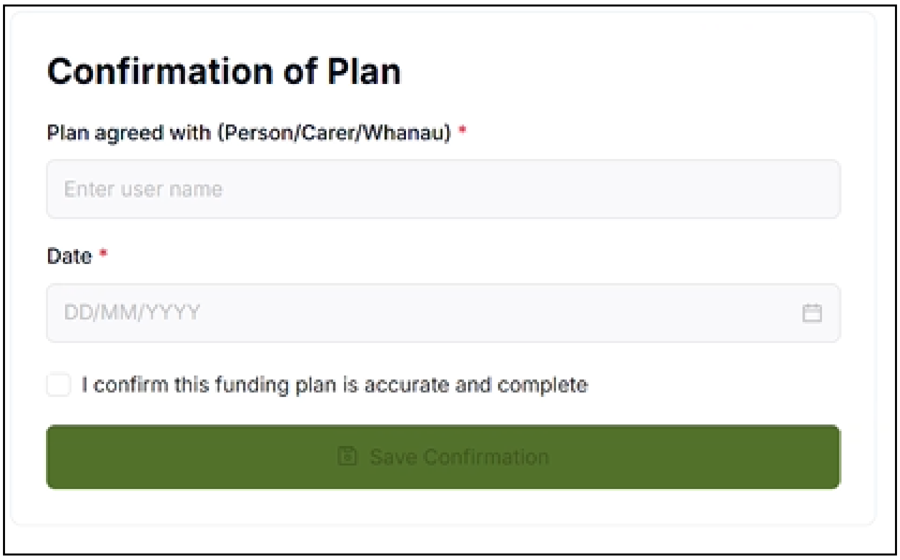


You can download the plan from this screen to give to the Disabled Person for review.

8.5 Disabled Person Sign Off

You can record that the Disabled Person has signed off on their My DSS Funding Plan. To do so:

1. Enter the Disabled Person's name in the *Plan agreed with (Person/Carer/Whanau)* field
2. Enter the date in the *Date* field
3. Mark *I confirm this funding plan is accurate and complete*
4. Click **Save Confirmation:**



8.6 Completing the Funding Plan

You can enter any notes regarding the funding plan in the *Notes* field.

Once you are happy, click **Complete** to complete the My DSS Funding Plan. When the plan is complete it becomes **no longer editable:**