

**Disability  
Support Services**



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

# **OBIR User Guide**



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**Document History**

**Revision History**

Version	Date Updated	Summary of Changes	Author(s)

Note any changes made will be highlighted within the document.

# 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.

## 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**:

Action Required					Show	10	Assessments
NHI	Name	Assessment Date	Next Step	Actions			
ZZZ4578	Edward Rachett	27/02/2026	<a href="#">Continue Assessment</a>	 			

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	  

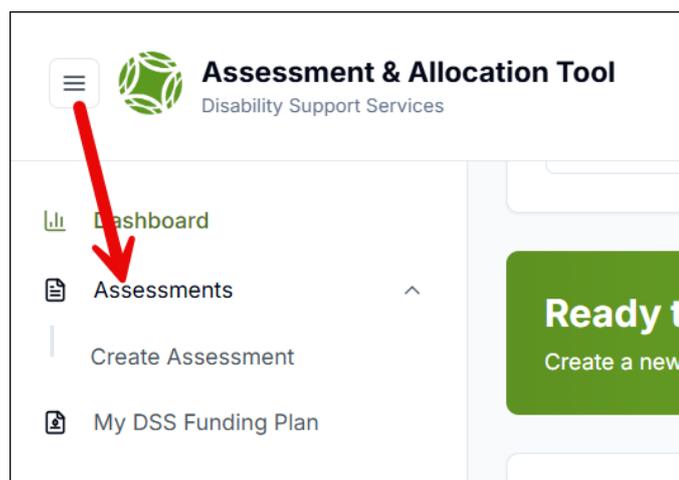
## 2.2 Searching/Viewing Assessments

You can easily view an assessment by doing the following:

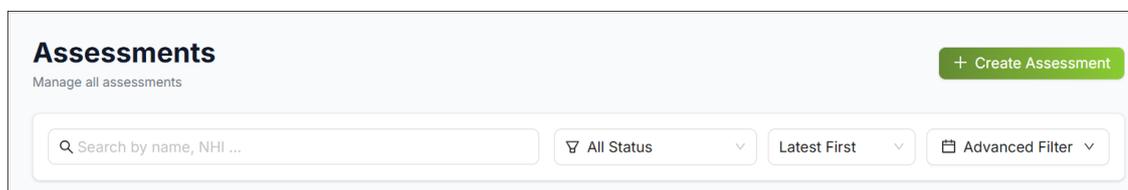
1. Ensure the lefthand panel is expanded by clicking the icon with three lines (top left corner):



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:



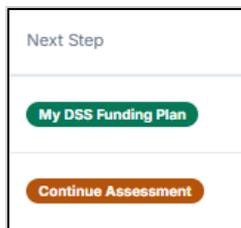
5. Click the **Down Arrow** icon to download the completed assessment and funding plan:

NHI	Name	Plan Start Date	Plan End Date	Status	Actions
ZZZ5651	Claire Donovan	27/02/2026	28/02/2026	Funding Plan Completed	 

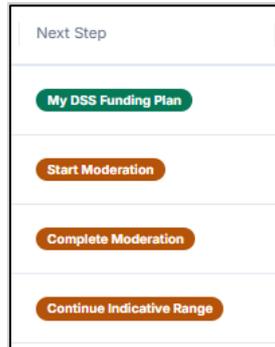
### 2.3 Action Required

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

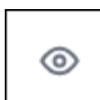


If assigned both roles all the above will be accessible.

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

Action Required					Show	10	Assessments
NHI	Name	Assessment Date	Next Step	Actions			
ZZZ0240	Rachel O' Connor	26/02/2026	Assess Approval Request	   			

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:

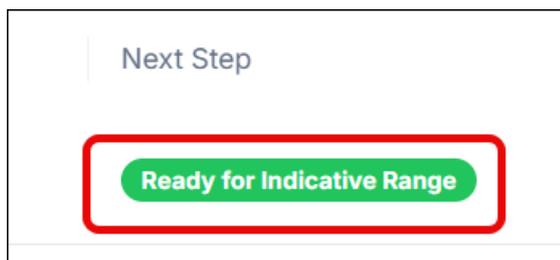
The screenshot shows the 'Action Required' section with a table of assessments. A dropdown menu is open, showing options for 5, 10, 20, 50, and 100 items. The '10' option is selected and highlighted.

NHI	Name	Assessment Date	Next Step
ZZZ0210	Jane Peyton	23/02/2026	<a href="#">My DSS Funding Plan</a>
ZZZ0085	Jonathan Burns	23/02/2026	<a href="#">My DSS Funding Plan</a>

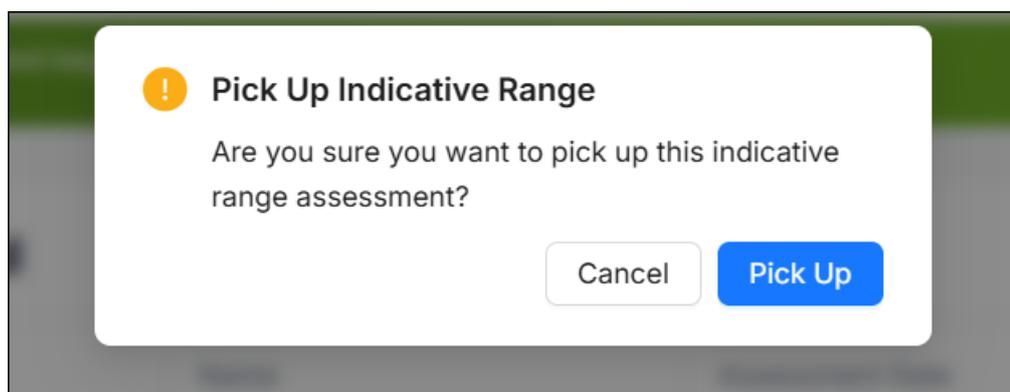
### 2.3.1 Picking up an Assessment

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**:

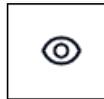


## 2.4 Recent People

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 these in the *Recent People* section:

Recent People				
NHI	Name	Assessment Date	Status	Actions
ZAX63FH	Jane Peyton	23/02/2026	In Progress	  

To view an assessment, click this icon:



To edit an assessment, click this icon:



To delete an assessment, click this icon:

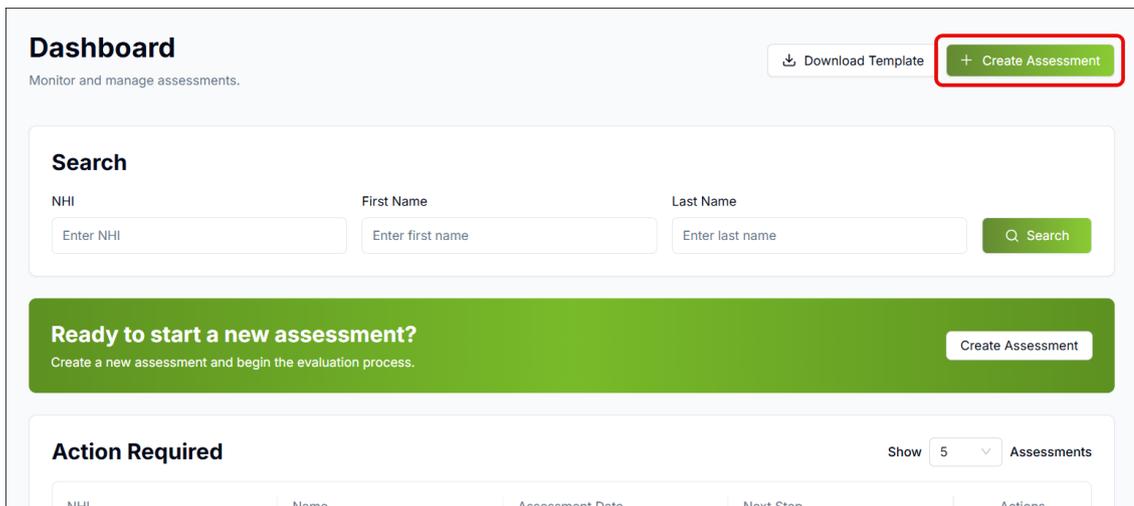


### 3 Assessor Creates an Assessment

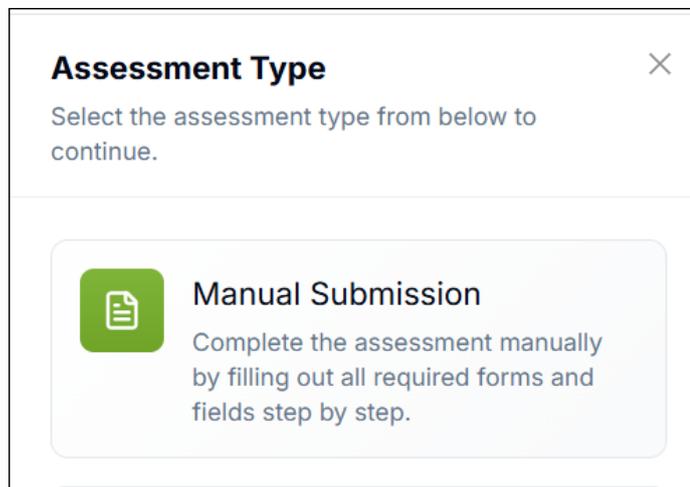
#### 3.1 Assessment Creation

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**

The screenshot shows the 'Personal Details' form with the following fields and values:

- NHI \***: ZZZ31FM
- Assessment Date**: 16/01/2026
- First Name \***: Harper
- Last Name \***: Smith
- Life Stage \***: High school to leaving school (usually 12 to 18 or 21 year old)
- Plan Type \***: Standard Plan (selected)

Navigation buttons at the bottom include '< Back', 'Abandon', and 'Continue'.

### 3.2 Holistic Section

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

The screenshot displays the assessment interface for 'Harper Smith' (NHI: ZZZ31FM). The left-hand panel shows a list of assessment sections under the 'Holistic' category, which is highlighted with a red box:

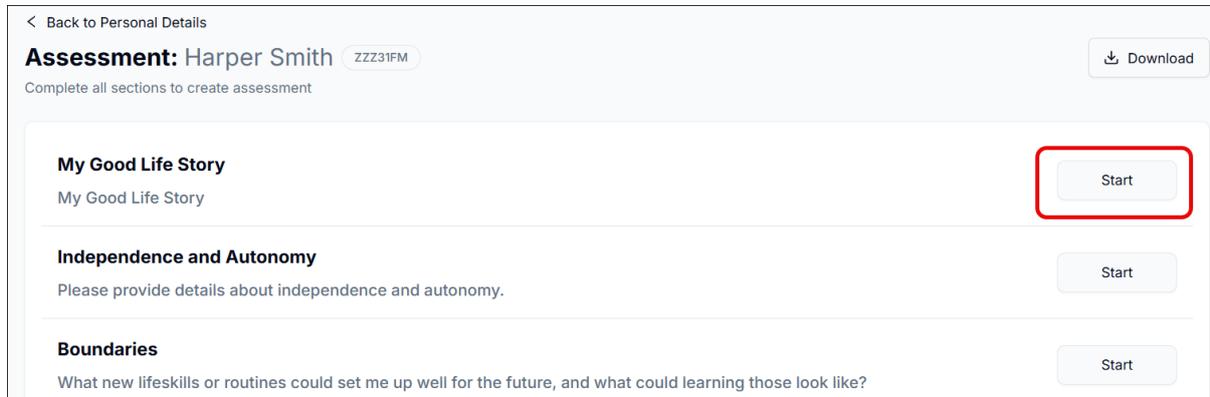
- My Good Life Story
- Independence and Autonomy
- Boundaries
- Safety and Security
- Aspirations
- Careers and Support
- Opportunity
- Strengths and Interests

The main content area shows the following sections:

- My Good Life Story**: My Good Life Story
- Independence and Autonomy**: Please provide details about independence and autonomy.
- Boundaries**: What new lifeskills or routines could set me up well for the future?
- Safety and Security**: Please provide details about safety and security.
- Aspirations**

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:



< Back to Personal Details

**Assessment: Harper Smith** 22231FM Download

Complete all sections to create assessment

**My Good Life Story** Start

My Good Life Story

**Independence and Autonomy** Start

Please provide details about independence and autonomy.

**Boundaries** Start

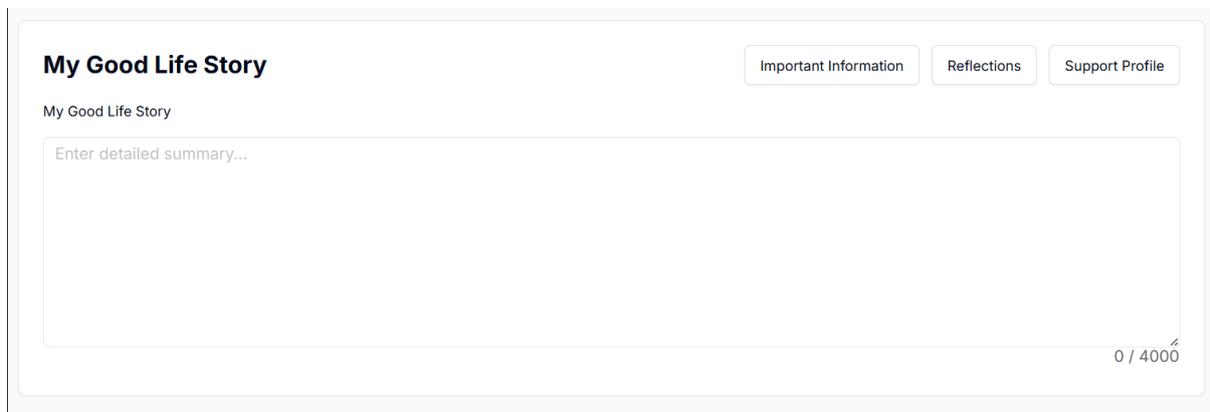
What new lifeskills or routines could set me up well for the future, and what could learning those look like?

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



Section 1 of 6 **Holistic** 3% 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:



**My Good Life Story** Important Information Reflections Support Profile

My Good Life Story

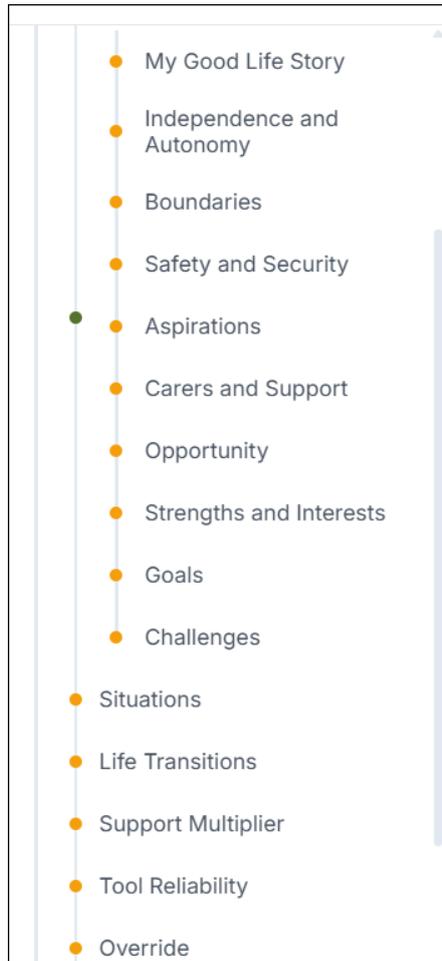
Enter detailed summary...

0 / 4000

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

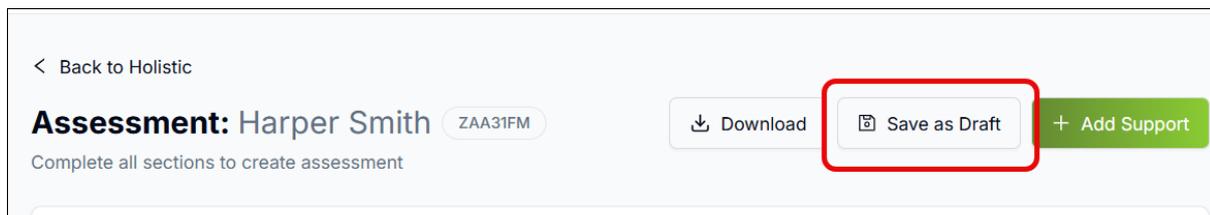


Once you're happy, click **Continue** to move to the next page or select the relevant section from the lefthand navigation panel:



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

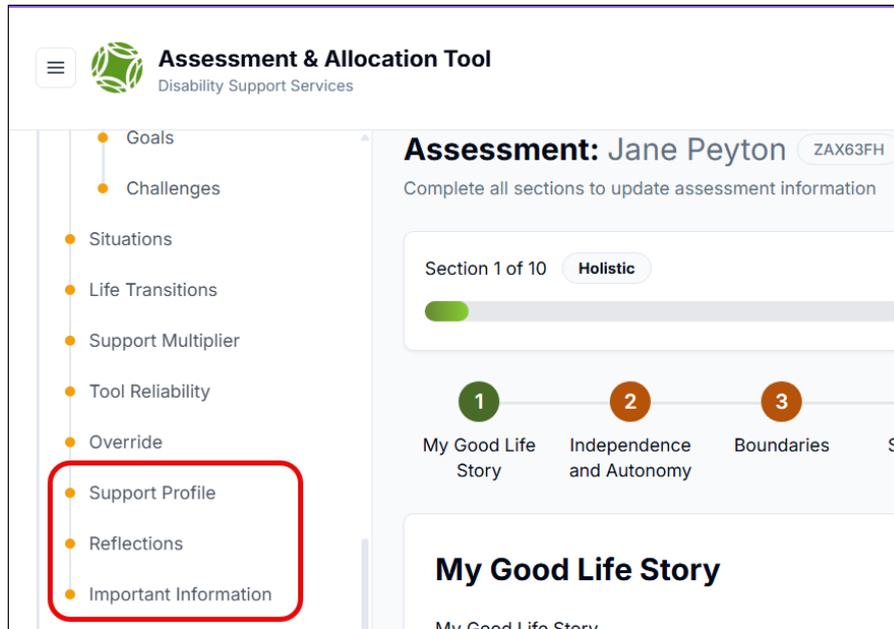
At any stage, you can click **Save as Draft** to save the Assessment and come back to it later:



### 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.

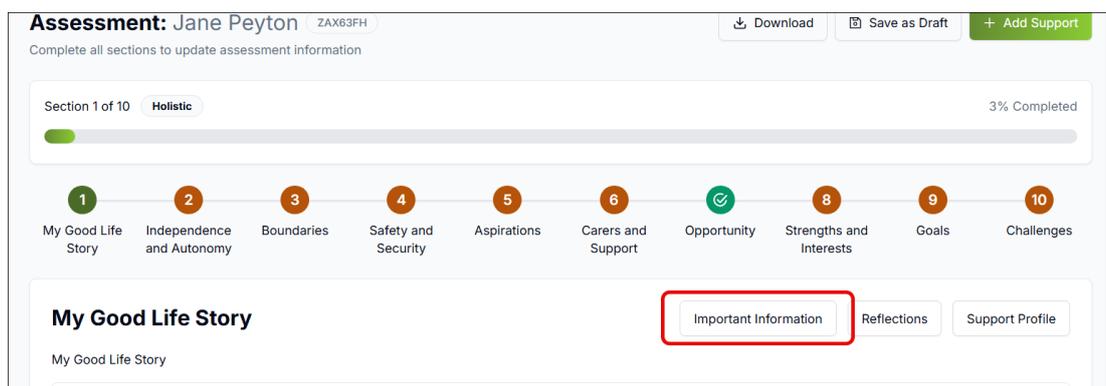
While you can add these from pages of the *Holistic* section, you can also answer and view all of your responses for each section collated together by clicking the respective option in the lefthand panel:



#### 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:

**Important Information** ×

Complete the sentence below to summarize your current situation.

I may require focussed support with toileting, managing continence or other hygiene products.

No  Yes

I require dedicated support to be safe using appliances, heaters etc.

No  Yes

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:

**Assessment: Jane Peyton** ZAX63FH Download Save as Draft + Add Support

Complete all sections to update assessment information

Section 1 of 10 **Holistic** 3% Completed

1 My Good Life Story 2 Independence and Autonomy 3 Boundaries 4 Safety and Security 5 Aspirations 6 Carers and Support 7 Opportunity 8 Strengths and Interests 9 Goals 10 Challenges

**My Good Life Story** Important Information **Reflections** Support Profile

My Good Life Story

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*):

**Reflections** ×

Complete the sentence below to summarize your current situation.

**Independently** With Support

Independently, my whanau and networks mean that:

I am

often

in control of how my will and preference is determined and communicated

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

Independently, my whanau and networks mean that:

I have

little or no

enduring roles and activities that support me to demonstrate my strengths, be valued, and maintain connection with others

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**:

Select an option from below to update your data set for your select question.

**Signalling** Sustaining Strengths

Other people and places (outside disability) play a significant role in my life

Other people and places (outside disability) play a regular role in my life

Other people and places (outside disability) play some or a semi-regular role in my life

Other people and places (outside disability) play little or an irregular role in my life

**Other people and places (outside disability) usually don't play a role in my life**

Close

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

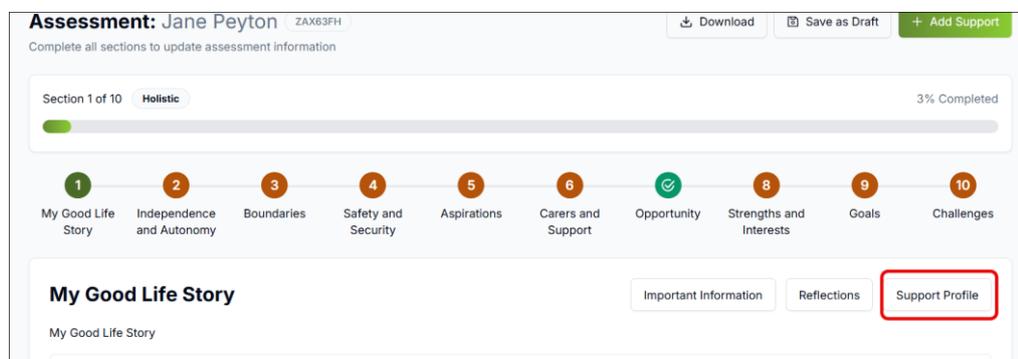
7. Once all answers have been entered, click the **X** to close the *Reflections* tab and the information will save automatically.

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.

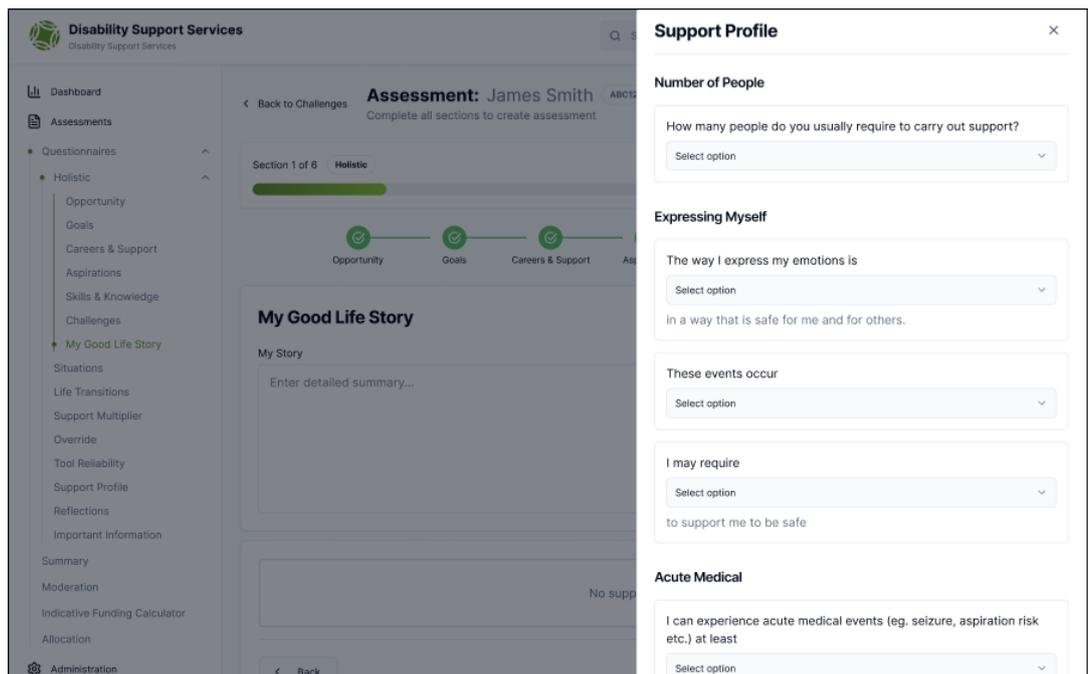
### 3.3.3 Support Profile

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**

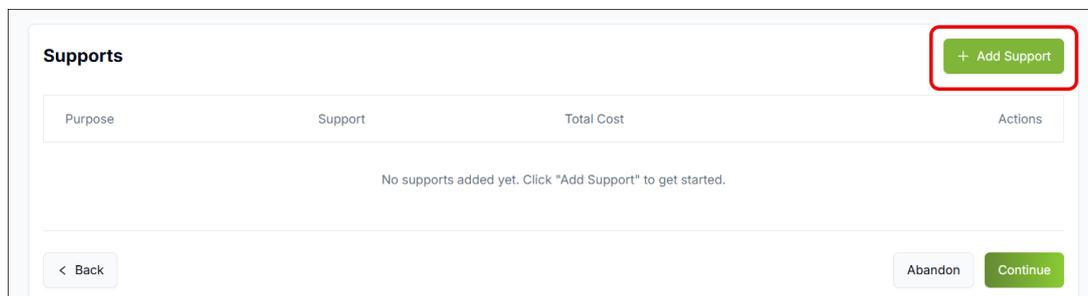
As you proceed through the Assessment, you can click on the **Support Profile** from the lefthand navigation to enter information.

### 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.

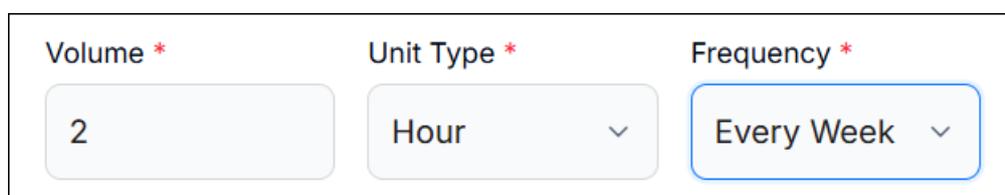
To add a support:

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:

Supports				+ Add Support
Area	Support	Total Cost	Actions	
Daily routines	someone to take me to my afterschool activities	\$7,821.43	  	

< Back
Abandon
Continue

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**:

Section 2 of 6 Situations 23% Completed

#### Situations

How many homes does the disabled person live between in an ordinary month?

One

How close do they live to most of their activities?

Conveniently close

Does one of their caregivers also have a disability, or does the disabled person also have a dependent with a disability?

One or more of my caregivers also has a disability

< Back Abandon 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:

Section 3 of 6 Life Transitions 43% Completed

#### Life Transitions

The disabled person has a condition that is newly acquired, diagnosed or emerged. No Yes

The disabled person has a condition that is likely to deteriorate No Yes

The disabled person has a condition that is likely to improve No Yes

The disabled person is leaving the family/foster home No Yes

< Back Abandon Continue

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

### 3.6 Support Multiplier

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

Section 4 of 6 **Support Multiplier** 63% Completed

---

### Support Multiplier

How many people are usually required to carry out support?

The disabled person requires 1 person to deliver the support they require

How much of the support required arises because of non-disability related reasons (eg. health conditions, mental health, Oranga Tamariki involvement)?

None

< Back Abandon **Continue**

### 3.7 Override

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

Section 6 of 6 **Override** 100% Completed

---

### Override

Is there other, non-standard information, that needs to be taken into account in setting the range (and about what effect does that have)?

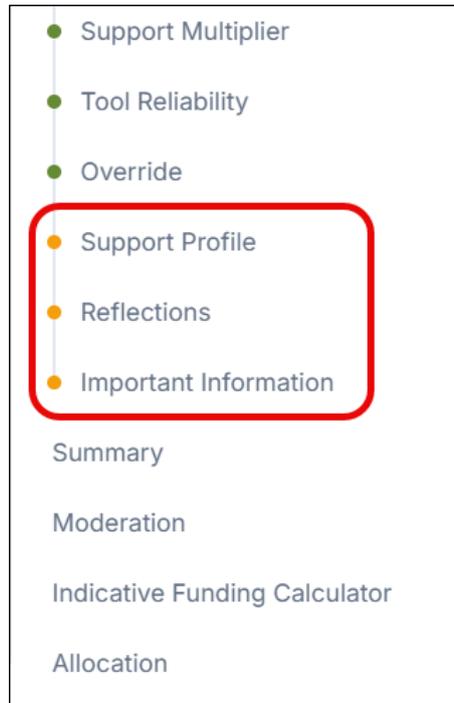
None

< Back Abandon **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 on the top of the summary page.

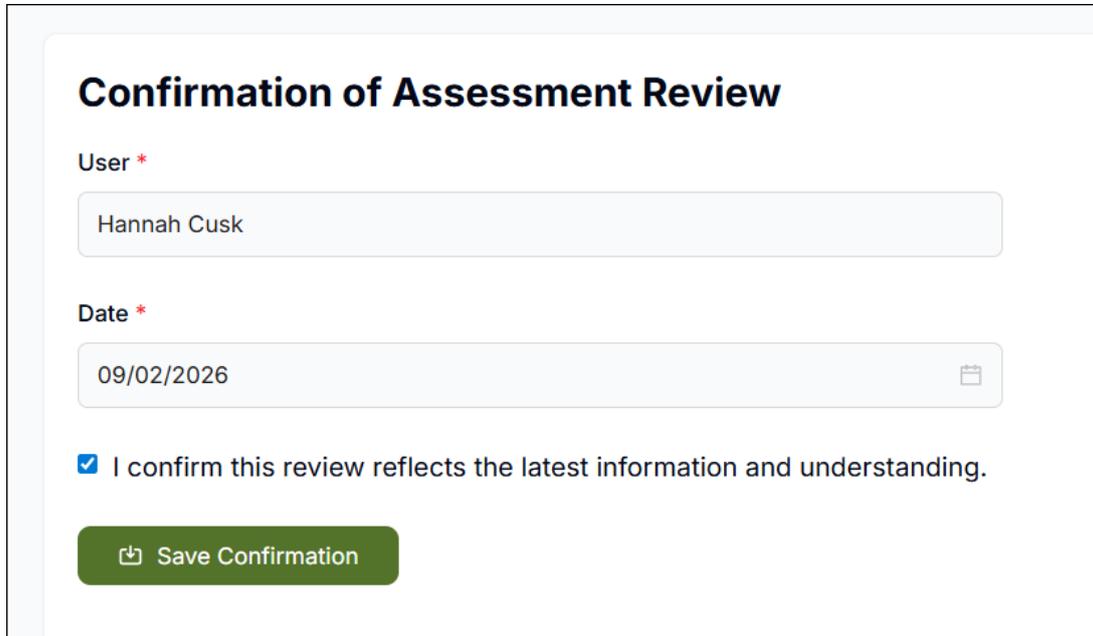
This can then be printed/emailed to the Disabled Person for confirmation the information is complete and correct.

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**:



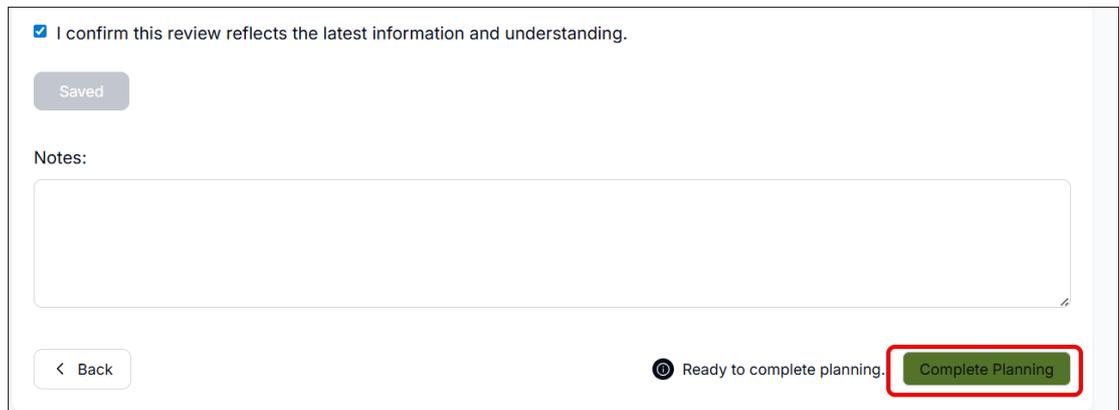
The screenshot shows a form titled "Confirmation of Assessment Review". It contains the following elements:

- User \***: A text input field containing "Hannah Cusk".
- Date \***: A date picker input field showing "09/02/2026".
- I confirm this review reflects the latest information and understanding.
- Save Confirmation**: A green button with a save icon.

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

To complete the assessment:

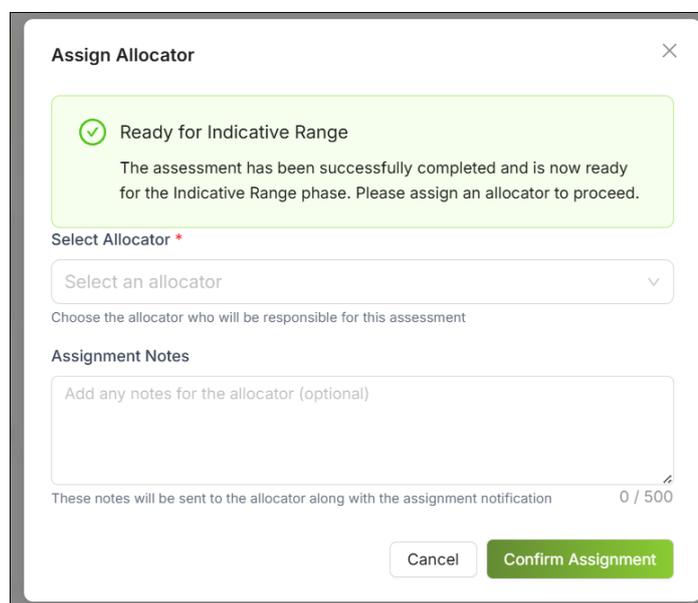
1. Click **Complete Planning**:



The screenshot shows the final step of the assessment process. It includes:

- I confirm this review reflects the latest information and understanding.
- Saved**: A grey button indicating the form has been saved.
- Notes:**: A large empty text area for adding notes.
- < Back**: A button to return to the previous step.
- Ready to complete planning:** A status indicator with a play icon.
- Complete Planning**: A green button highlighted with a red box, used to finish the assessment.

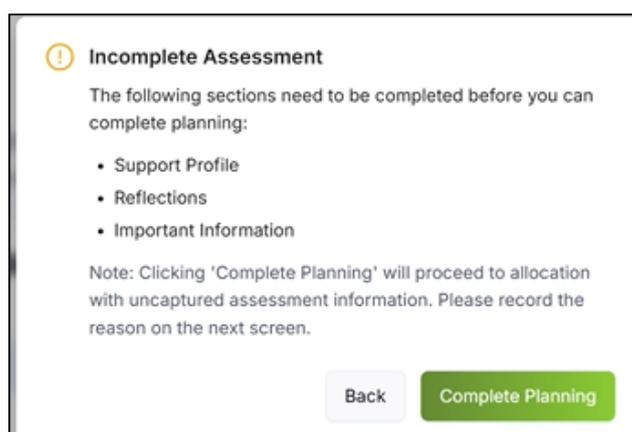
2. In the pop up, select the Allocator you want to assign this assessment to. You can also add assignment notes if you wish for the Allocator's attention. If you have both Assessor and Allocator roles, you can assign the assessment to yourself to continue:



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*:



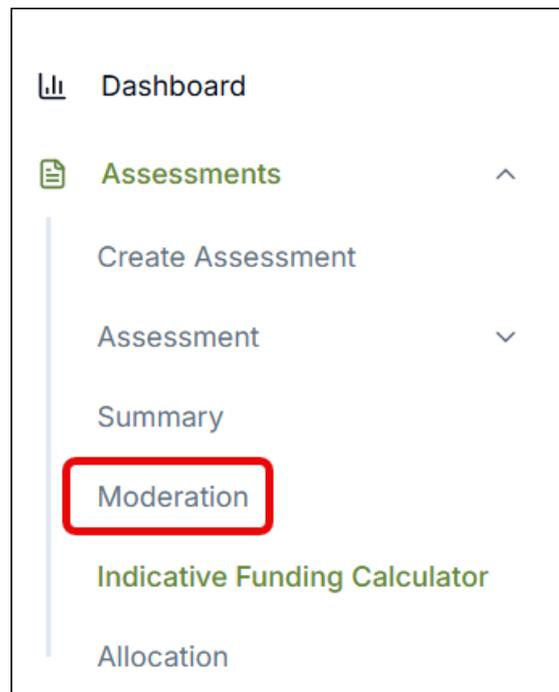
NHI	Name	Assessment Date	Next Step	Actions
ZZZ0089	James Jamieson	24/02/2026	<b>Start Moderation</b>	👁️ 🔄

To pick up that assessment:

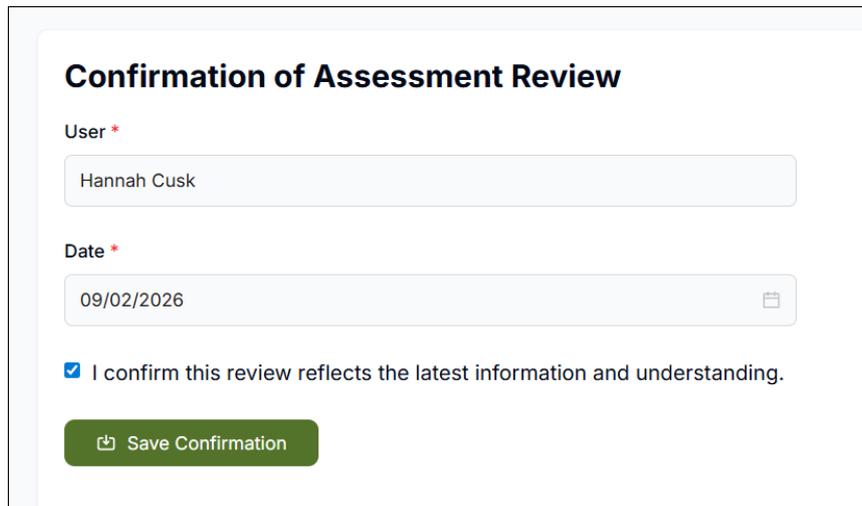
1. Click on the **Start Moderation** status
2. A pop up will appear asking you to confirm; click **Pick Up**
3. The assessment will open on the *Moderation* screen where you can easily navigate through the assessment to review the recorded information

### 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):



The screenshot shows a form titled "Confirmation of Assessment Review". It contains the following elements:

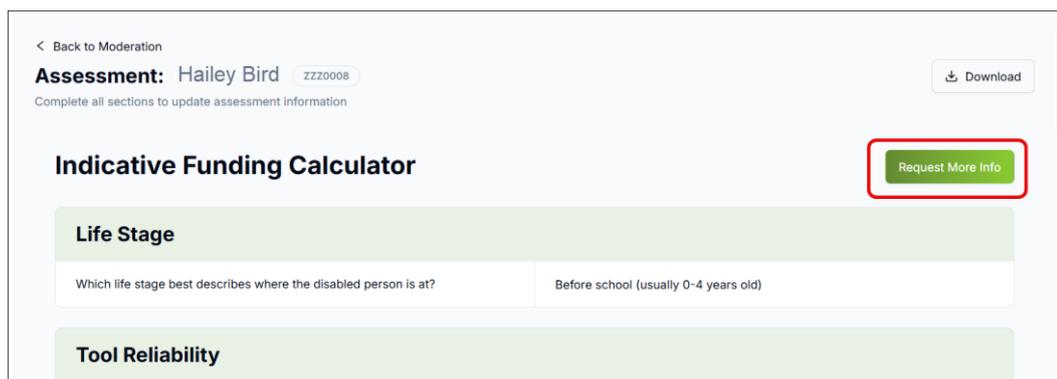
- User \***: A text input field containing "Hannah Cusk".
- Date \***: A date picker field showing "09/02/2026".
- I confirm this review reflects the latest information and understanding.
- Save Confirmation**: A green button with a save icon.

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:

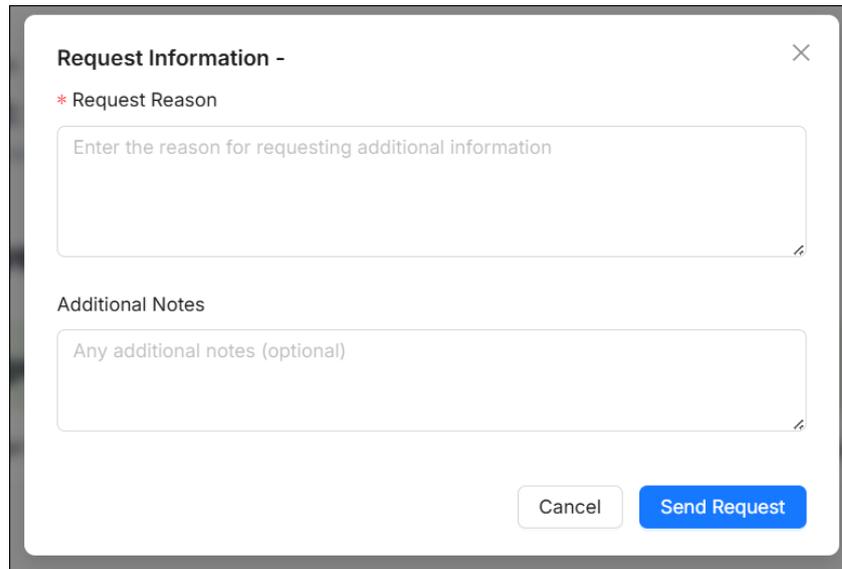
1. On the *Indicative Funding Calculator* screen, click **Request More Info**:



The screenshot shows the "Indicative Funding Calculator" screen. At the top, it says "< Back to Moderation" and "Assessment: Hailey Bird zzz0008". Below this is a "Download" button. The main heading is "Indicative Funding Calculator" with a "Request More Info" button highlighted in a red box. The form has two sections:

- Life Stage**: A section with a question "Which life stage best describes where the disabled person is at?" and a dropdown menu showing "Before school (usually 0-4 years old)".
- Tool Reliability**: A section below the Life Stage section.

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



The image shows a 'Request Information' pop-up window. It has a title bar with a close button (X). Below the title, there is a section for 'Request Reason' with a red asterisk indicating it is required. This section contains a text input field with the placeholder text 'Enter the reason for requesting additional information'. Below this is an 'Additional Notes' section with a text input field and the placeholder text 'Any additional notes (optional)'. At the bottom right of the form, there are two buttons: a white 'Cancel' button and a blue 'Send Request' button.

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



The image shows a table titled 'Action Required' with a 'Show 10 Assessments' dropdown. The table has five columns: 'NHI', 'Name', 'Assessment Date', 'Next Step', and 'Actions'. There is one row of data with the following values: 'ZZZ0008' in the NHI column, 'Hailey Bird' in the Name column, '2026-01-20' in the Assessment Date column, 'Information Requested' in the Next Step column (highlighted in a red pill), and a vertical ellipsis in the Actions column.

NHI	Name	Assessment Date	Next Step	Actions
ZZZ0008	Hailey Bird	2026-01-20	Information Requested	⋮

#### 4.4 Assigning the Assessment to DSS

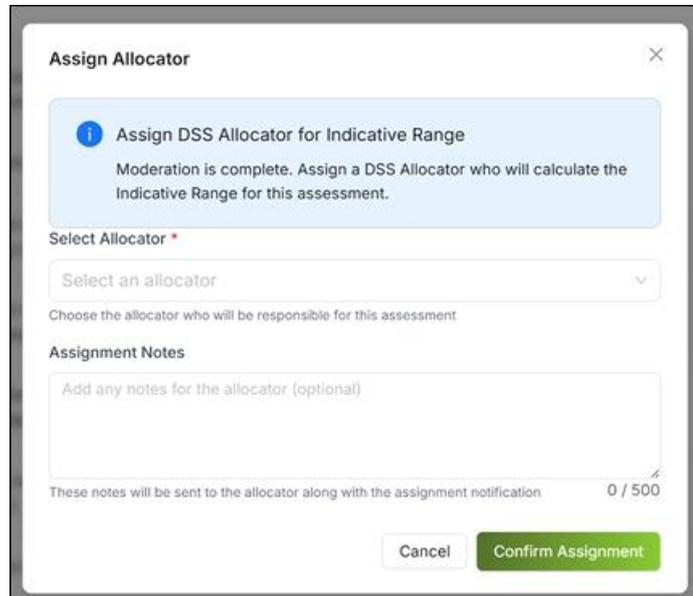
Once you have completed the Confirmation of Assessment Review, you should assign the assessment to the DSS Allocator who will complete the indicative funding range.

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



The image shows a section of the 'Indicative Funding Calculator' screen. It contains two text input fields with the following text: 'Our child escalates frequently, rapidly, and/or significantly, in response to otherwise small issues.' and 'Our child breaks or damages things when they escalate.'. At the bottom right of this section, there is a green button labeled 'Assign DSS Allocator' which is highlighted with a red rectangular box.

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**:



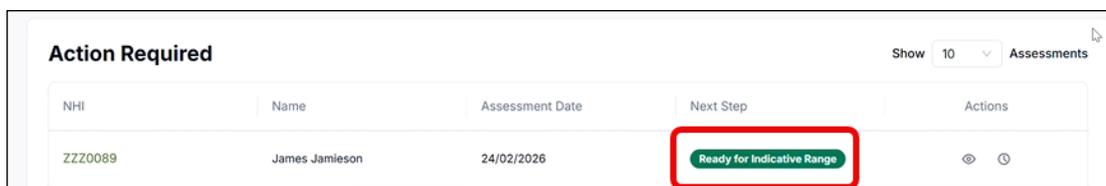
The screenshot shows a modal window titled "Assign Allocator" with a close button (X) in the top right corner. Inside the modal, there is a light blue information box with a blue 'i' icon. The text in the box reads: "Assign DSS Allocator for Indicative Range. Moderation is complete. Assign a DSS Allocator who will calculate the Indicative Range for this assessment." Below this box is a section labeled "Select Allocator \*" with a dropdown menu currently showing "Select an allocator". Underneath the dropdown is the instruction "Choose the allocator who will be responsible for this assessment." The next section is "Assignment Notes" with a text area containing the placeholder "Add any notes for the allocator (optional)". At the bottom of the text area, it says "These notes will be sent to the allocator along with the assignment notification" and "0 / 500". At the bottom right of the modal are two buttons: "Cancel" and "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.

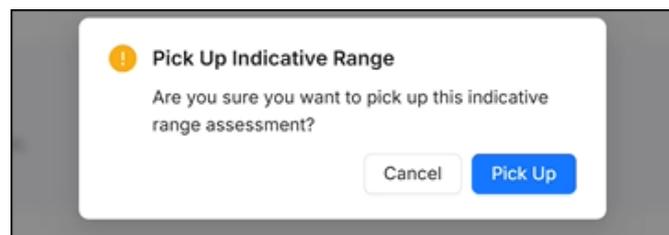
To export the results:

1. Find the assessment on your *Dashboard*
2. Click on the **Ready for Indicative Range** status next to the assessment:

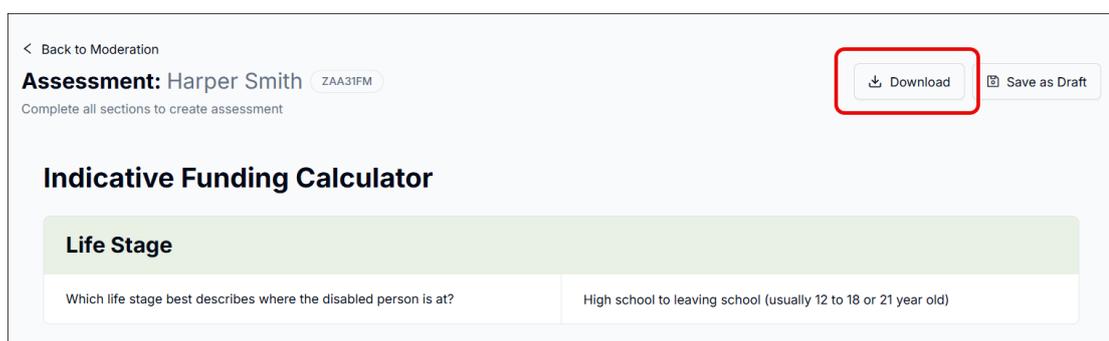


NHI	Name	Assessment Date	Next Step	Actions
ZZZ0089	James Jamieson	24/02/2026	Ready for Indicative Range	 

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



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



< Back to Moderation

**Assessment:** Harper Smith ZAA31FM

Complete all sections to create assessment

**Indicative Funding Calculator**

**Life Stage**

Which life stage best describes where the disabled person is at? High school to leaving school (usually 12 to 18 or 21 year old)

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

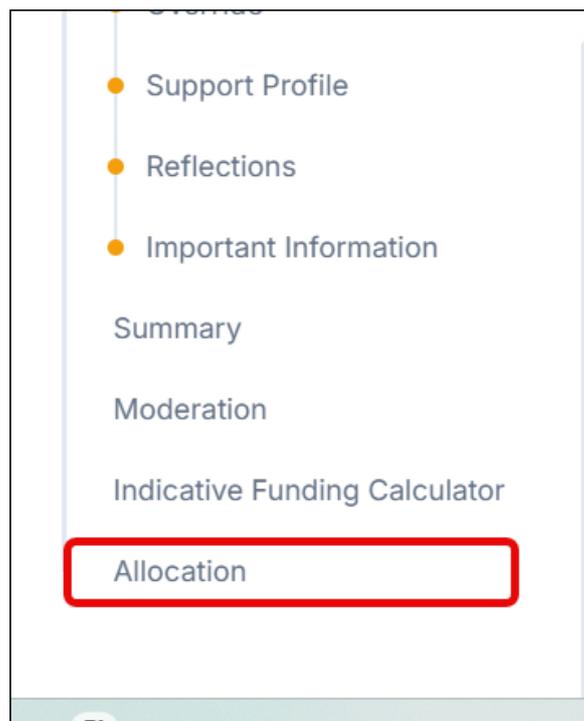
## 6 Managing the Indicative Funding Range in OBIR

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:



- Record the lower and upper limits of the funding range in their respective fields
- Record your confidence level in your range assessment:

< Back to Indicative Funding Calculator

**Indicative Range:** James Jamieson ZZZ0089

Complete all sections to update assessment information

### Configure allocation parameters and confidence levels

Lower Range \* (DSS Only)

Upper Range \* (DSS Only)

Confidence (DSS Only)

Override  0%

Dual Funding  0%

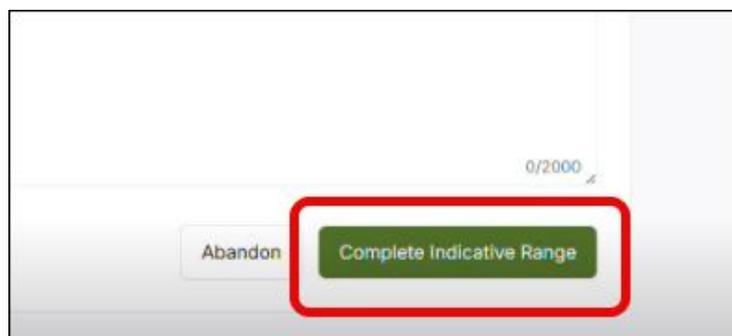
**Adjusted Ranges**

Adjusted Lower Range	Adjusted Upper Range
<b>\$10000.00</b>	<b>\$20000.00</b>

**Rationale**

Enter notes here...

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



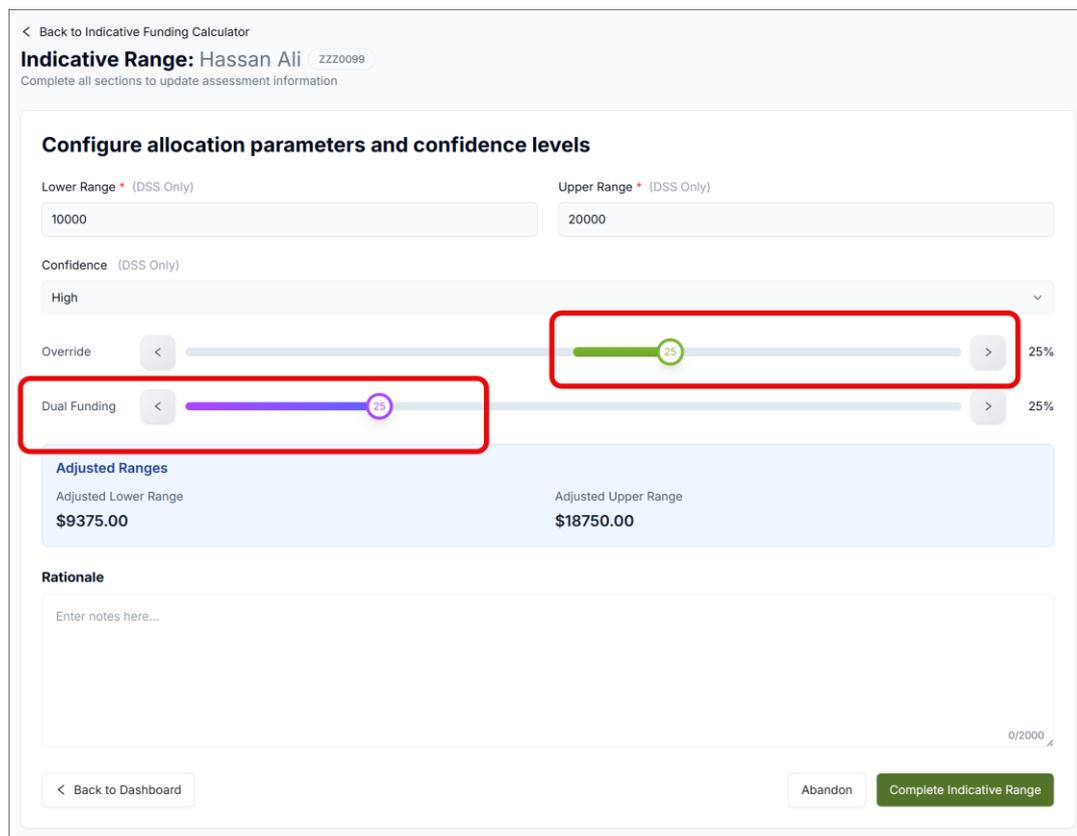
## 6.2 Allocator Reviews the Funding Range

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



NHI	Name	Assessment Date	Next Step	Actions
ZZZ0089	James Jamieson	24/02/2026	Continue 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:



< Back to Indicative Funding Calculator

**Indicative Range:** Hassan Ali ZZZ0099  
Complete all sections to update assessment information

### Configure allocation parameters and confidence levels

Lower Range \* (DSS Only)  Upper Range \* (DSS Only)

Confidence (DSS Only)

Override  25%

Dual Funding  25%

**Adjusted Ranges**

Adjusted Lower Range **\$9375.00** Adjusted Upper Range **\$18750.00**

**Rationale**

Enter notes here... 0/2000

< Back to Dashboard

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**:

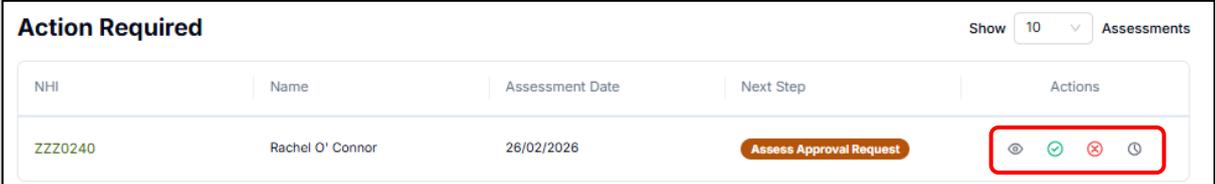
10. If the Manager declines the Indicative Range it will appear in your *Action Required* section with a status of *Declined Assessment*:



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*:



Action Required					Show	10	Assessments
NHI	Name	Assessment Date	Next Step	Actions			
ZZZ0240	Rachel O' Connor	26/02/2026	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

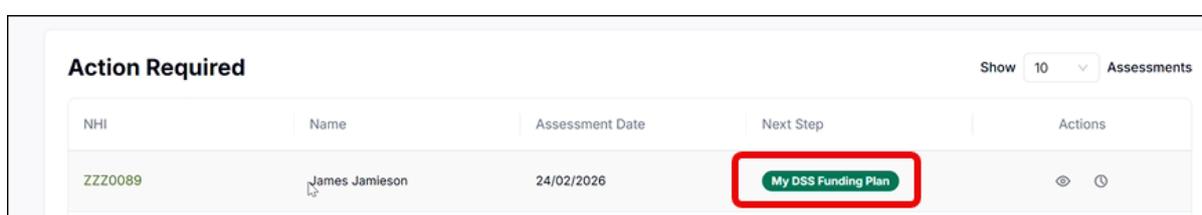
## 8 My DSS Funding Plan

### 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.

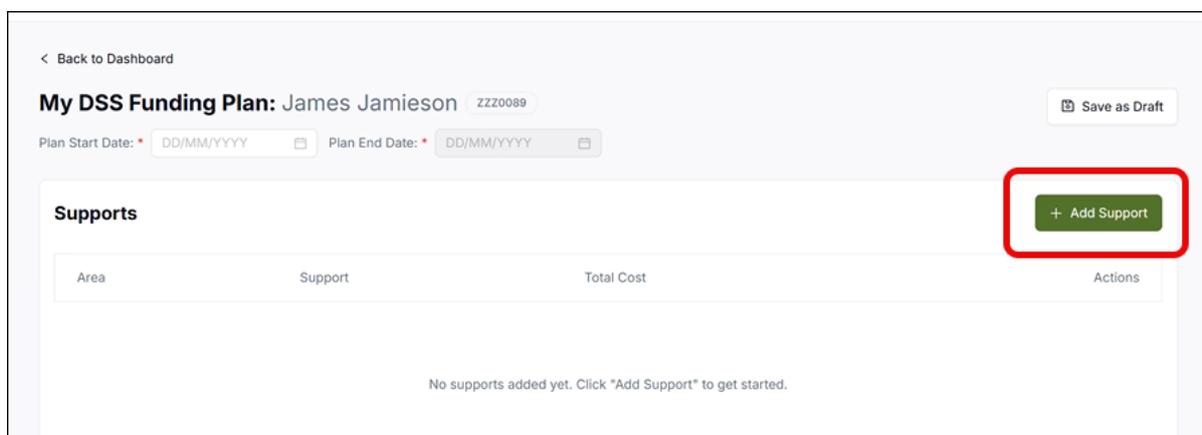
To do so, the Assessor or Allocator can pick up the assessment from their *Actions Required* section on the *Dashboard*.

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



NHI	Name	Assessment Date	Next Step	Actions
ZZZ0089	James Jamieson	24/02/2026	<b>My DSS Funding Plan</b>	👁️ 🕒

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:



< Back to Dashboard

**My DSS Funding Plan: James Jamieson** ZZZ0089 Save as Draft

Plan Start Date: DD/MM/YYYY Plan End Date: DD/MM/YYYY

**Supports** + Add Support

Area	Support	Total Cost	Actions
------	---------	------------	---------

No supports added yet. Click "Add Support" to get started.

### 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:

Volume *	Unit Type *	Frequency *
<input type="text" value="2"/>	<input type="text" value="Hour"/>	<input type="text" value="Every Week"/>

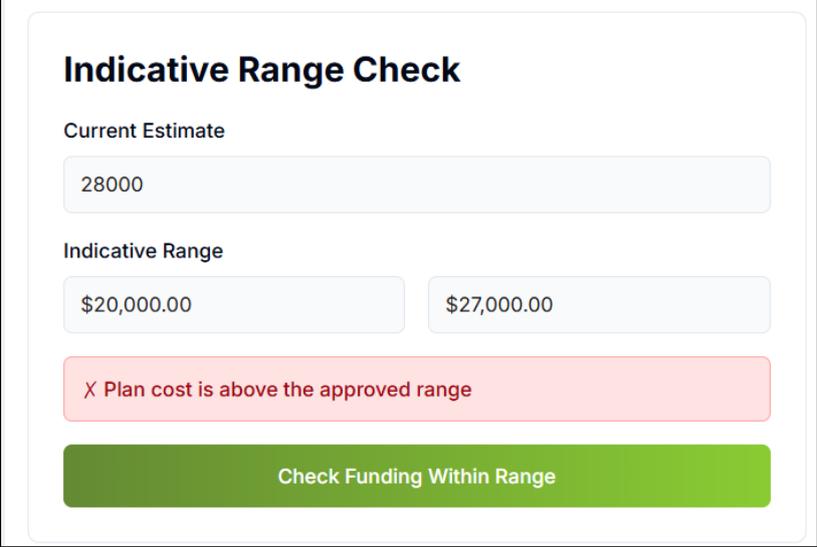
6. The Unit Cost. This is the cost for each unit type you have selected. E.g. if you selected 2 hours every week, the Unit Cost will be the cost for one of those hours
7. Total Cost. This is automatically calculated by the system and is the total of all unit costs within the support date range you specified
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:



**Indicative Range Check**

Current Estimate

28000

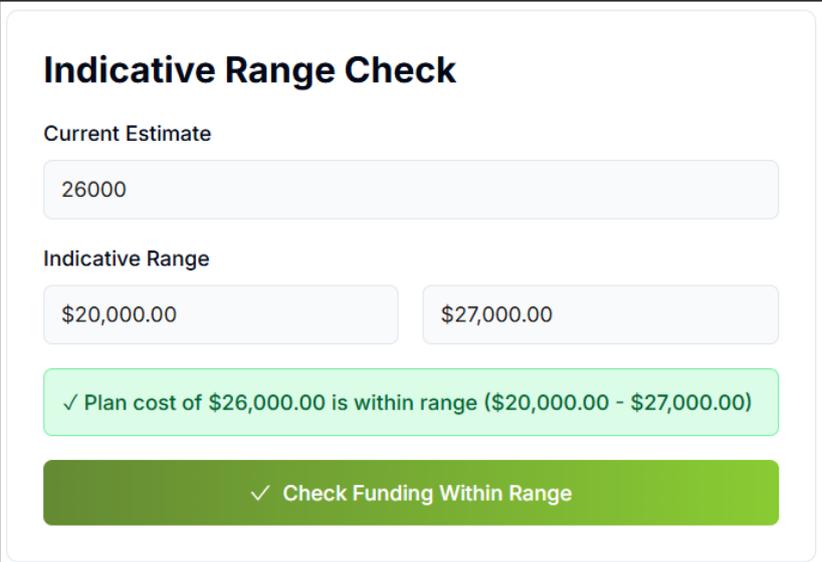
Indicative Range

\$20,000.00 \$27,000.00

X Plan cost is above the approved range

Check Funding Within Range

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



**Indicative Range Check**

Current Estimate

26000

Indicative Range

\$20,000.00 \$27,000.00

✓ Plan cost of \$26,000.00 is within range (\$20,000.00 - \$27,000.00)

✓ Check Funding Within Range

### 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.



< Back to Dashboard

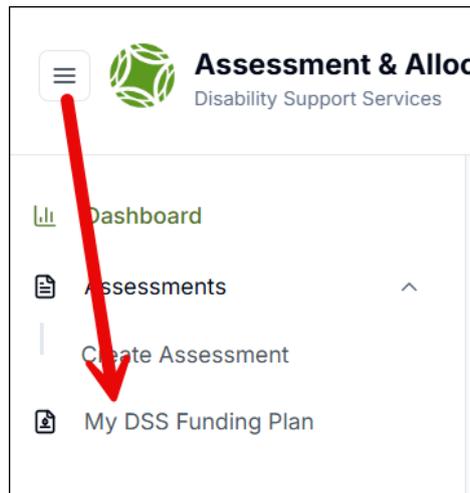
**My DSS Funding Plan:** Prue Halliwell ZZZ9856

Plan Start Date: \* 27/02/2026 Plan End Date: \* 26/02/2027

Supports + Add Support

Save as Draft

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:**

A screenshot of a form titled 'Confirmation of Plan'. It contains the following fields: a text input field for 'Plan agreed with (Person/Carer/Whanau) \*' with the placeholder 'Enter user name'; a date input field for 'Date \*' with the placeholder 'DD/MM/YYYY' and a calendar icon; a checkbox labeled 'I confirm this funding plan is accurate and complete'; and a green button labeled '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**:

**Notes**

Write details here



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[< Back](#) [Abandon](#) [Complete](#)