Disability Support Services

MINISTRY OF SOCIAL DEVELOPMENT
TE MANATŪ WHAKAHIATO ORA

# OBIR User Guide

## Version 3

**May 2026**

# Contents

**Document History**

**Revision History**

| Version | Date Updated | Summary of Changes | Author(s) |
|---|---|---|---|
| V2 | 13/04/2026 | Changes in line with release 2.1 | Alex Tierney,<br>Rachel O’Connor |
| V3 | 18/05/2026 | | Alex Tierney<br>Rachel O’Connor |
| | | | |

# 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 a **DSS Allocator** to support calculation of an Indicative Range (this is currently done via Excel)
4. The Indicative Range is entered into OBIR by the **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 Live Application URL:** | https://obirportal.msocio.nz/login |
| **OBIR Training Application URL:** | https://obirportal.mynonprod.com/ |

# 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

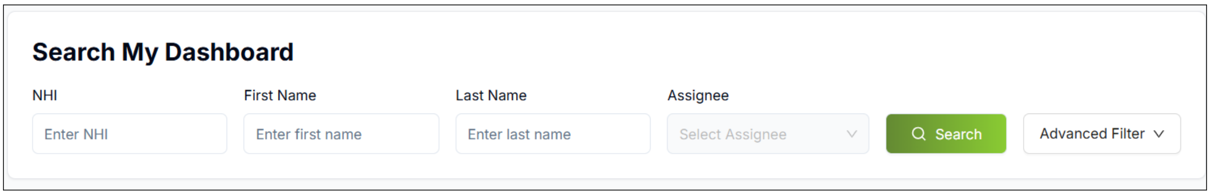
If assigned both roles all the above will be accessible.

**Manager**

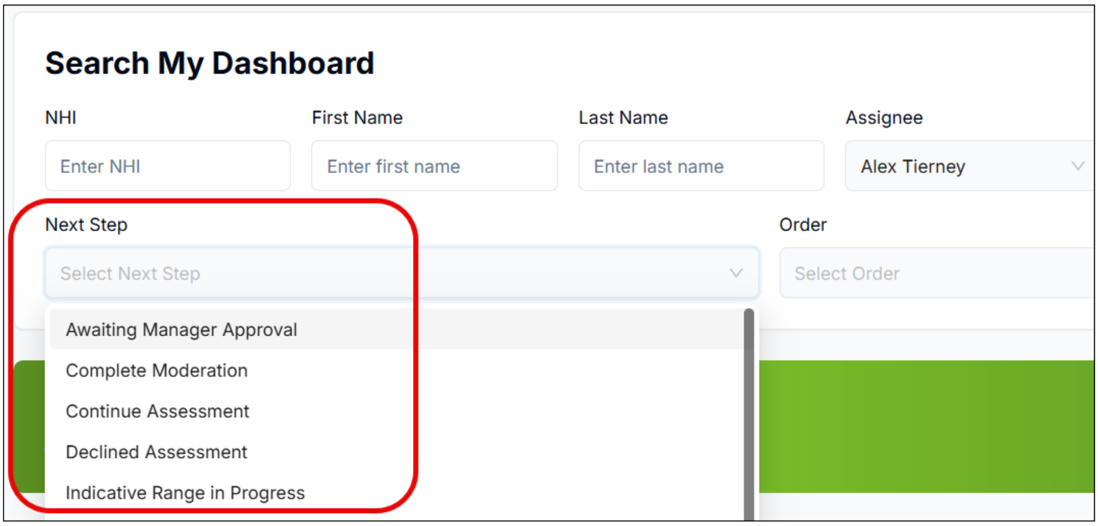
- Launch a new assessment
- View assigned assessments
- Reassign assessments and update personal details
- View and action tasks
- See recent people

## 2.1 Searching the Dashboard

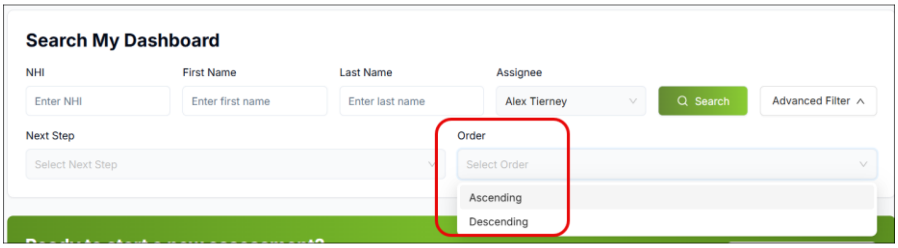
You can search for tasks and/or assessments created by or assigned to you by typing the Disabled Person's NHI, First Name, and/or Last Name in the respective fields or select from the assignee dropdown and clicking **Search**:



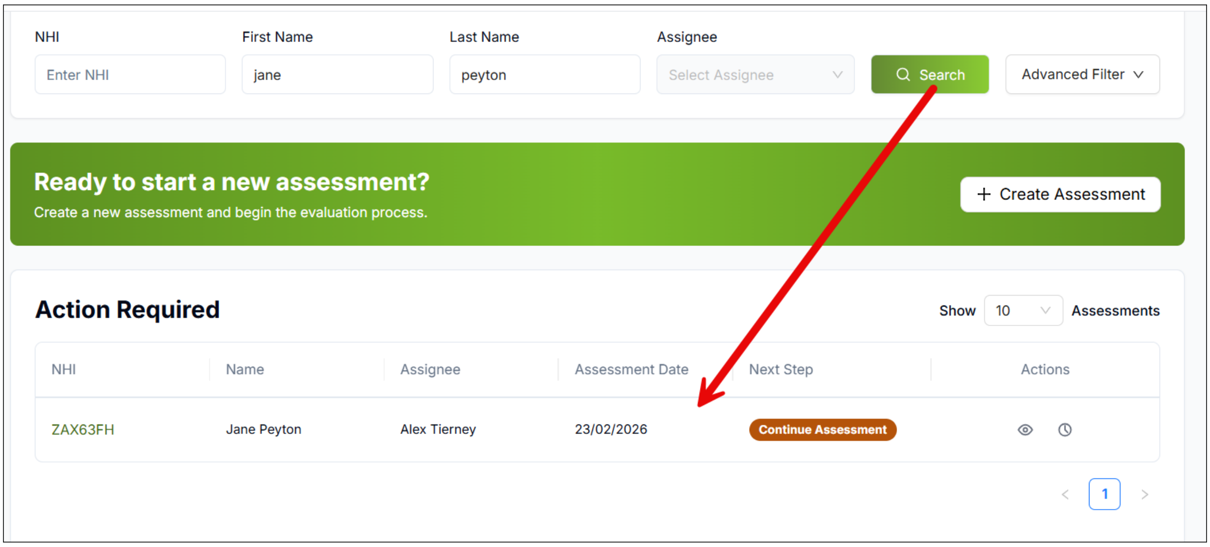

You can also filter assessments by status. To do so, click **Advanced Filter** and use the *Next Step* field to select the desired status:




In addition, you can arrange your required actions in ascending or descending order:



The system will then display any assessments matching the search criteria:




## 2.2 Assessment Statuses

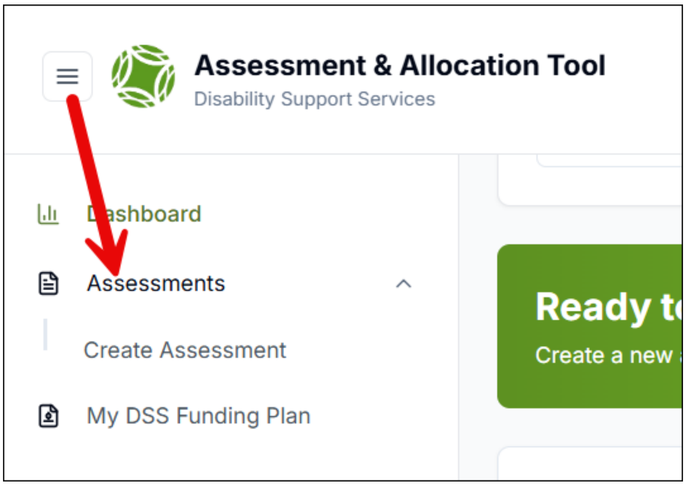
| Assessment Status | Description | Next step status | Assignee |
|---|---|---|---|
| Draft | Assessment has been started but not finished. | Continue Assessment | Assessor |
| Ready for Moderation | Assessment is complete and ready to be reviewed. | Start Moderation | Allocator |
| Moderation in-progress | Assessment is currently being reviewed. | Complete Moderation | Allocator |
| Info Requested | More information is needed before it can continue. | Information Requested | Assessor |
| Ready for IR | Moderation is complete and assessment has been sent to DSS for IR calculation | Ready for Indicative Range | DSS |
| Indicative Range in-progress | Indicative Range is being worked on by DSS or has been sent back to the allocator | Continue Indicative Range | DSS/Allocator |
| Assessment Completed | Assessment has been finalised. | MyDSS Funding Plan | Assessor/Allocator |
| Awaiting Approval | Waiting for approval of IR before moving forward. | Assess Approval Request | Manager |
| Declined | IR has been declined. | Declined Assessment | Allocator |
| Funding Plan Completed | Funding plan has been finalised. | No next step | |
| Abandon | Assessment has been ended without an IR and/or Funding plan | No next step | |

## 2.3 Searching/Viewing Assessments

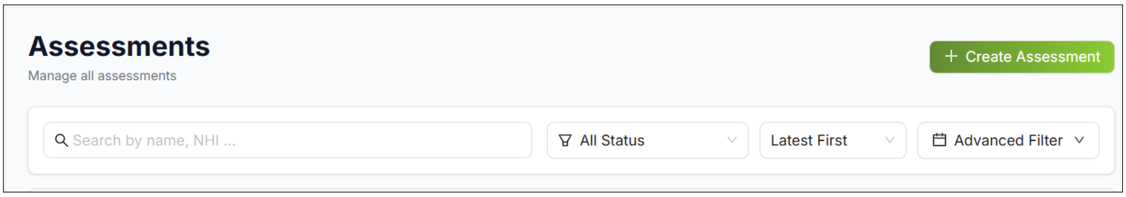
You can easily view an assessment by doing the following:

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


2. Click **Assessments**:

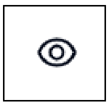



3. Here you can use the Search bar and/or filters to find the assessment you need:

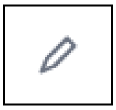



4. Click the **Eye** icon next to the assessment to open it up in View mode:

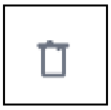

5. To view an assessment, click this icon:



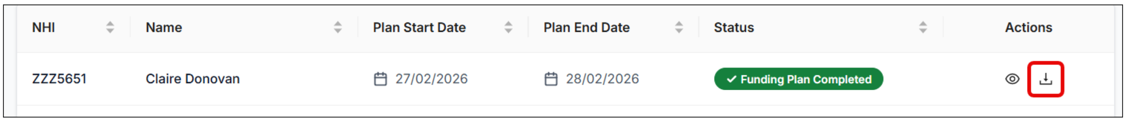
6. To edit an assessment, click this icon:



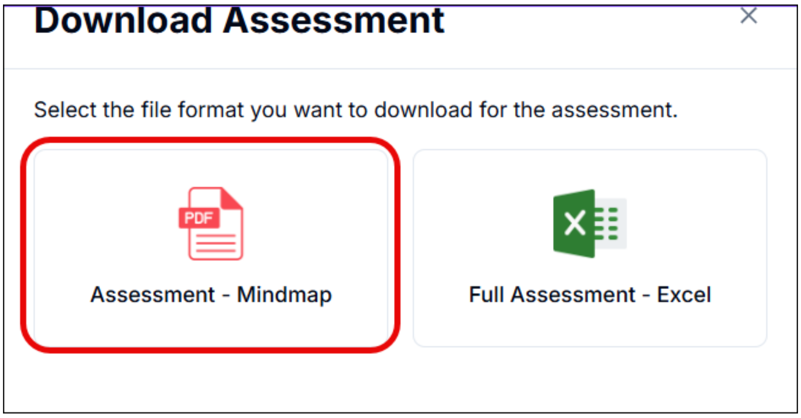
7. To delete an assessment, click this icon (Please note, only assessment creators can delete an assessment):



8. Click the **Down Arrow** icon to download the completed assessment and funding plan (Please note this can only be done when in the Funding Plan Completed status):




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

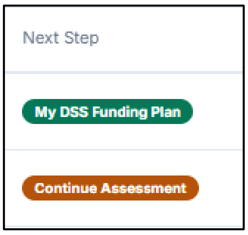



10. -

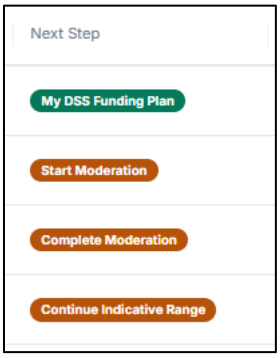
## 2.4 Action Required

In the *Action Required* section on the *Dashboard* screen, 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:

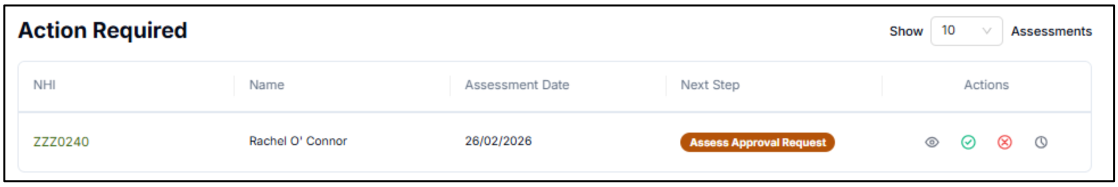



The Allocator Only role will see Start Moderation, Complete Moderation, Continue Indicative Range and My DSS Funding Plan as next step tasks:



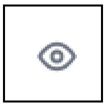

If assigned both roles all the above will be accessible.

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

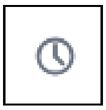



| NHI | Name | Assessment Date | Next Step | Actions |
|---|---|---|---|---|
| ZZZ0240 | Rachel O' Connor | 26/02/2026 | Assess Approval Request | |

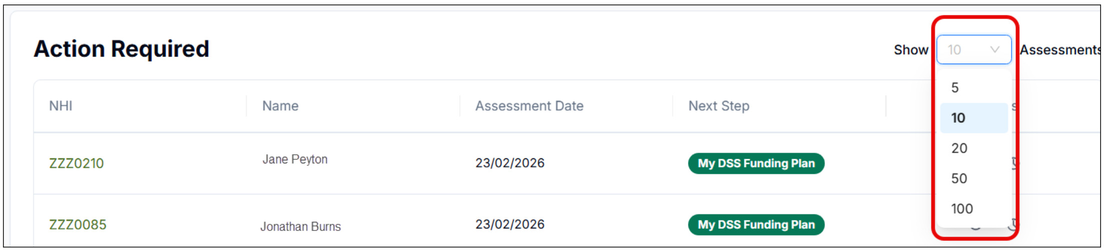
To view an assessment related to an action required, click the **View** icon next to it:



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:




### 2.4.1 Action Required Statuses

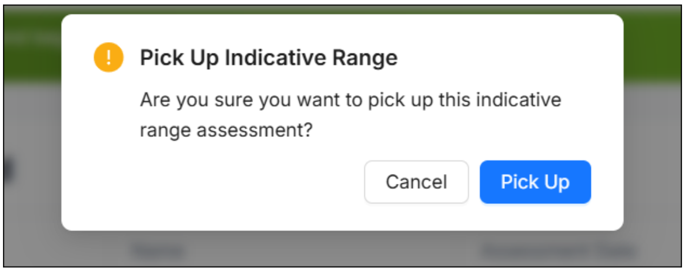
| Status | Description | Actor |
|---|---|---|
| Continue Assessment | Keep working on the assessment. | Assessor |
| Start Moderation | Begin reviewing the assessment. | Allocator |
| Complete Moderation | Finish the review process and send to DSS. | Allocator |
| Ready for Indicative Range | DSS to 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:

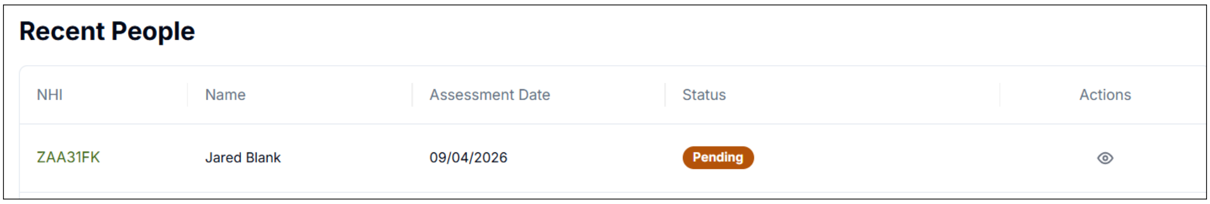
1. Click on the *Next Step* status next to the assessment in question:

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




## 2.5 Recent People

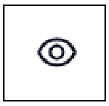
The *Recent People* section will display Disabled Persons that you recently interacted with. E.g. if you just completed an assessment or saved a partial assessment as a draft, you will be able to find and view these in the *Recent People* section:



**Recent People**

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

To view an assessment, click this icon:

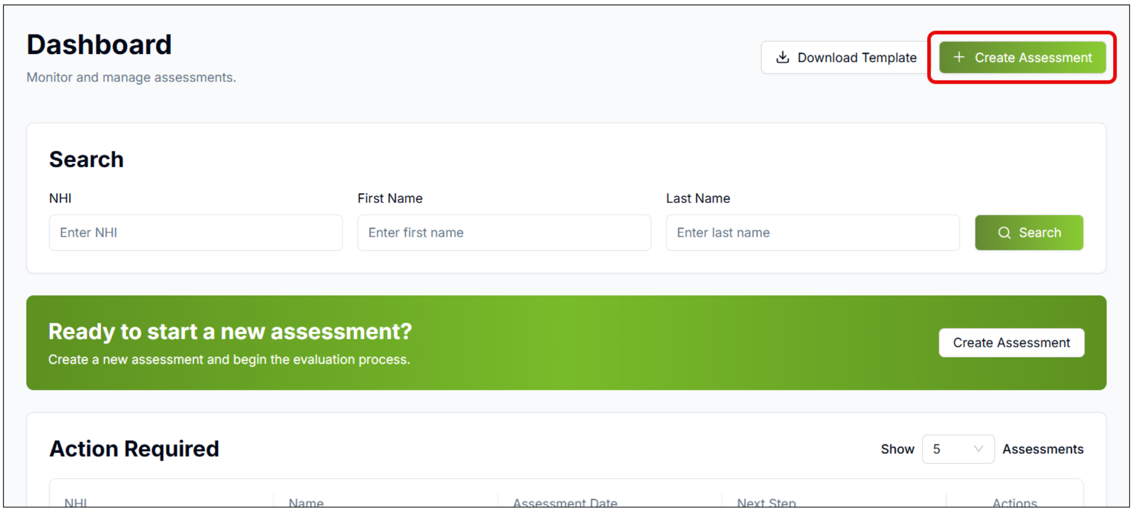


# 3 Assessor Creates an Assessment

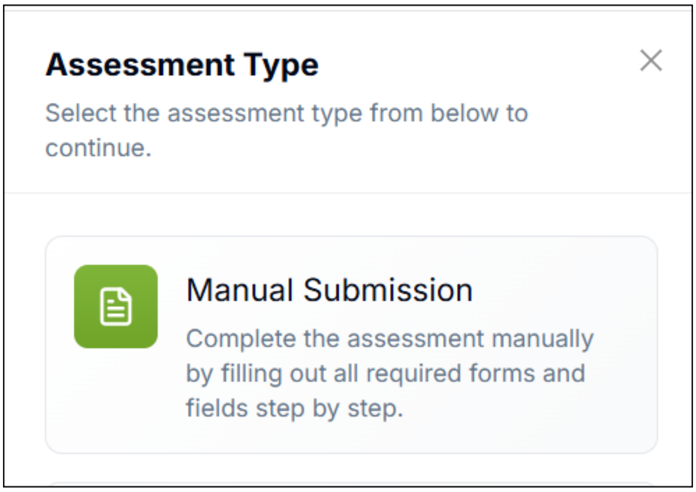
## 3.1 Assessment Creation

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. The Disabled Person's First and Last Name

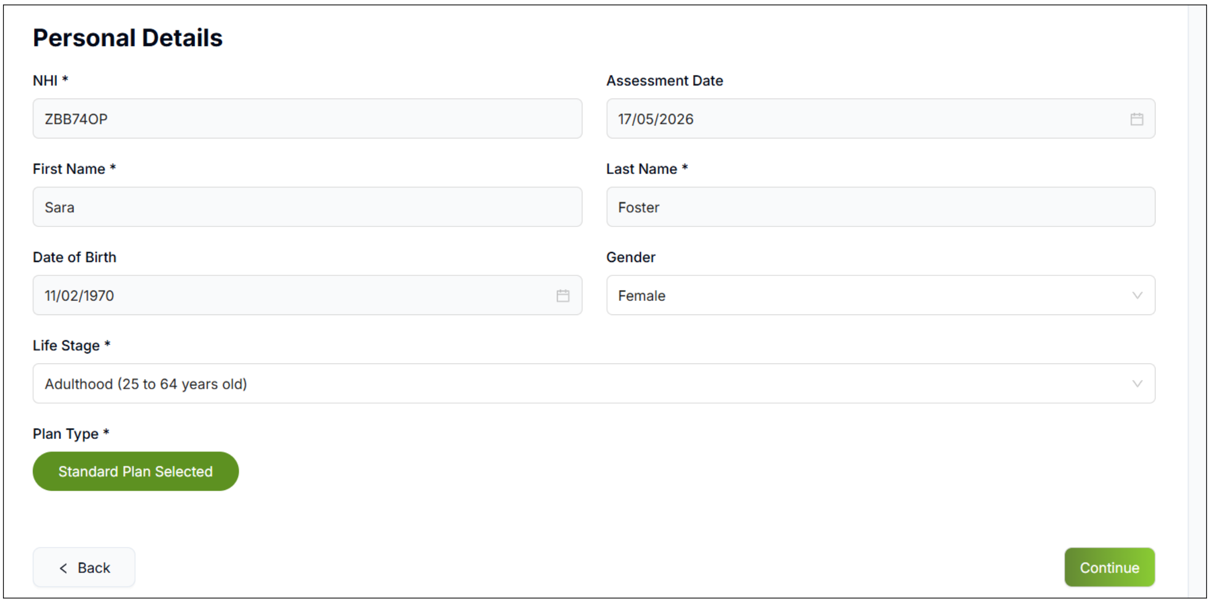
    d. The Disabled Person's DOB

    e. The Disabled Person's Gender (if you select *Any Other,* an additional field will appear to enable you to specify)

    f. The Disabled Person's Life Stage from the dropdown (please note, this will pre-select based on the Disabled Person's DOB)

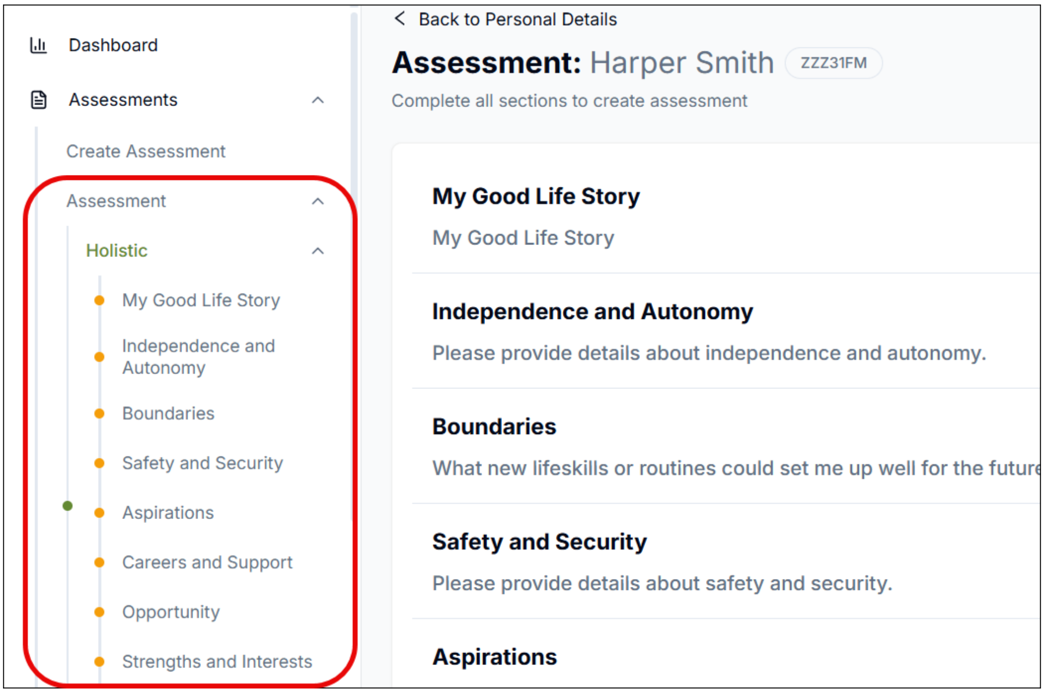
    g. Click **Standard Plan**

    h. Click **Continue**



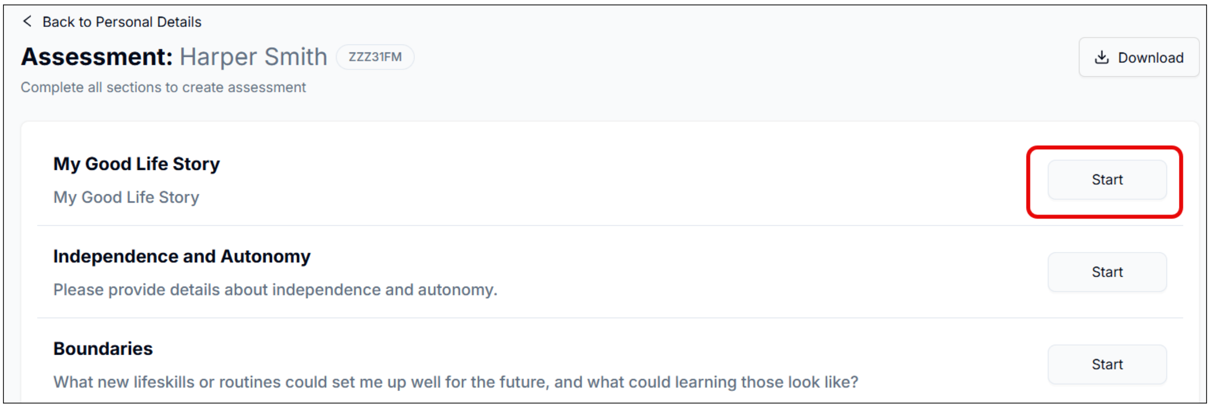
## 3.2 Holistic Section

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

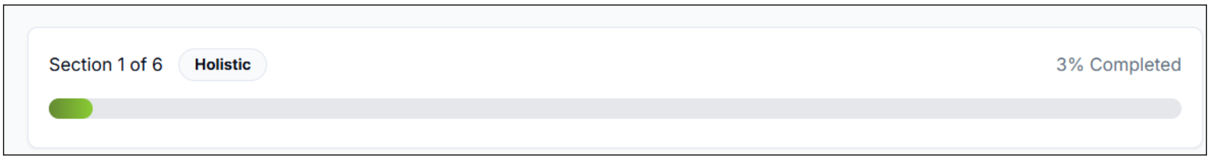



You will also see the different pages of the Holistic section displayed in the centre, with a **Start** button next to each stage.

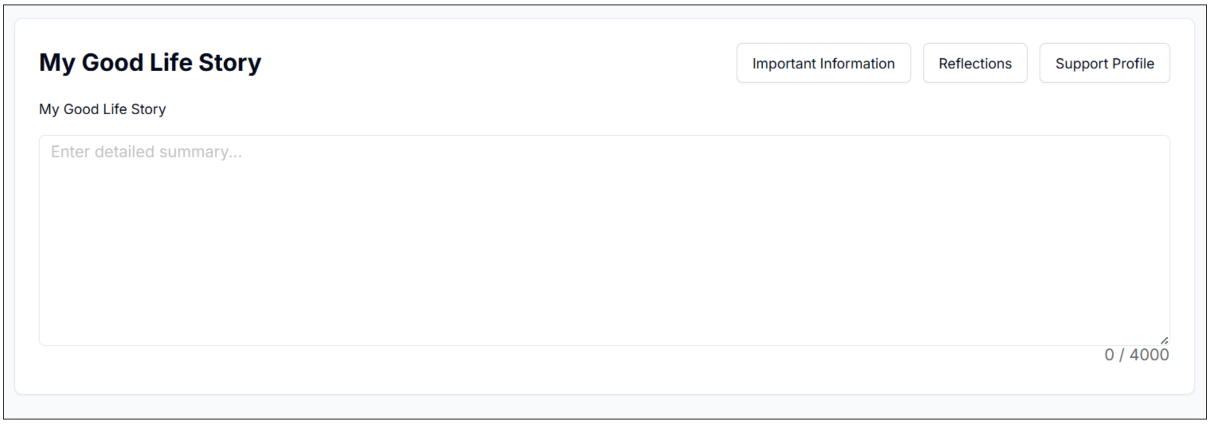
Click **Start** next to the desired page to enter information under that category:



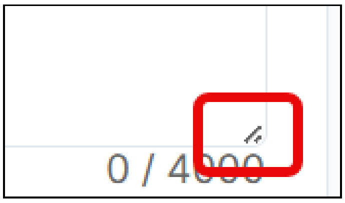

You will see a progress bar showing you how much of the assessment you have completed:



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:



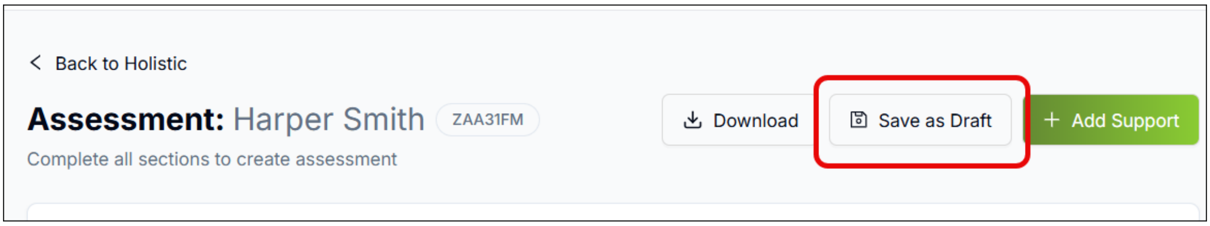

If you wish to make the free text field bigger, click on the bottom right-hand corner and drag the field down:




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.

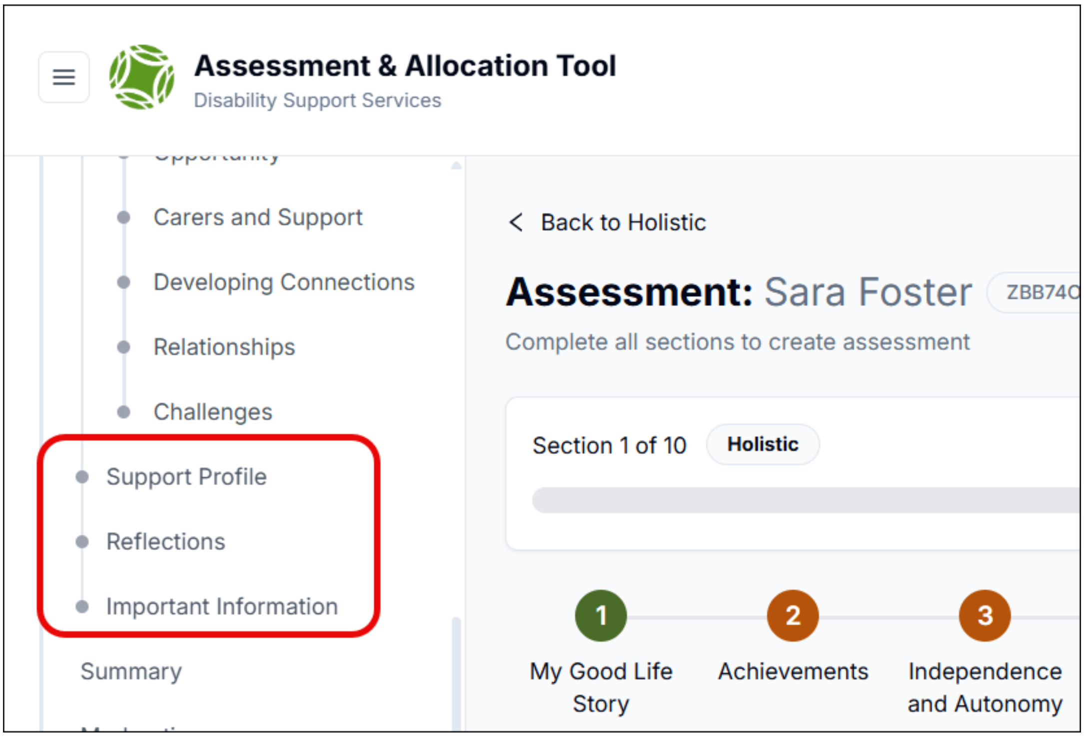
At any stage, you can click **Save as Draft** to save the Assessment and come back to it later:



## 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.

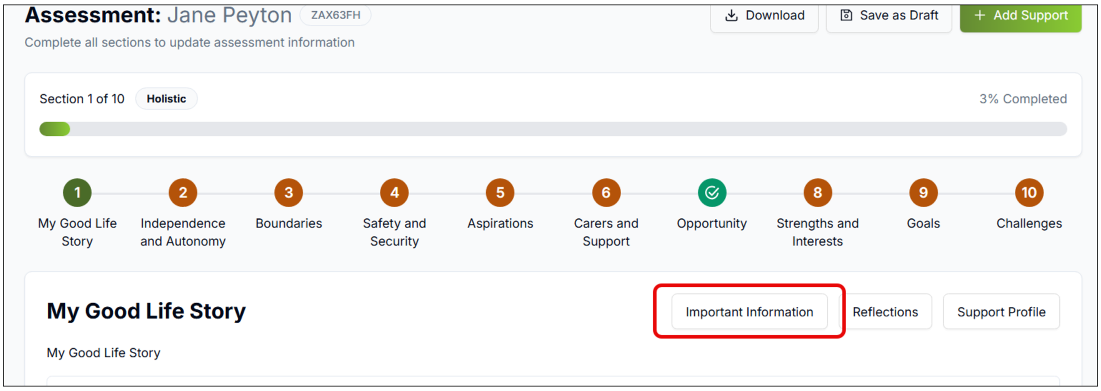
While you can add these from pages of the *Holistic* section, you can also answer and view all of your responses for each section collated together by clicking the respective option in the lefthand panel:



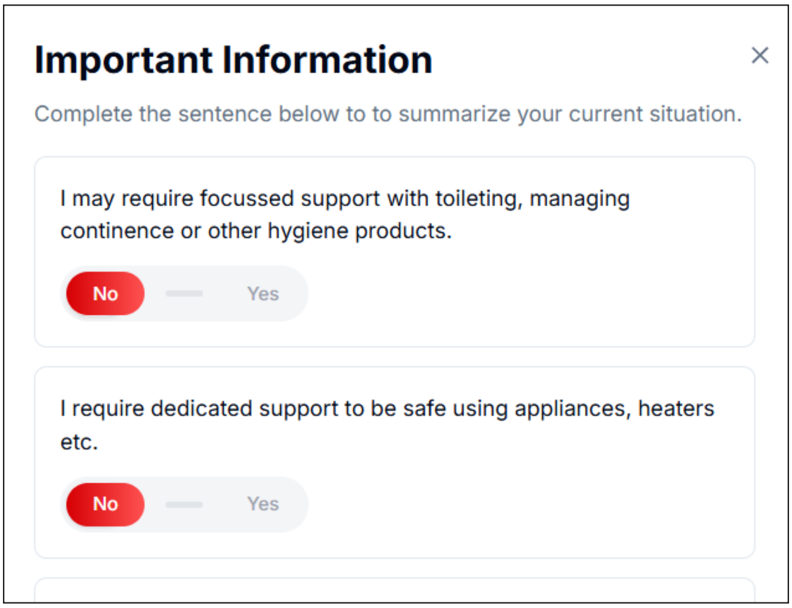

### 3.3.1 Important Information

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:



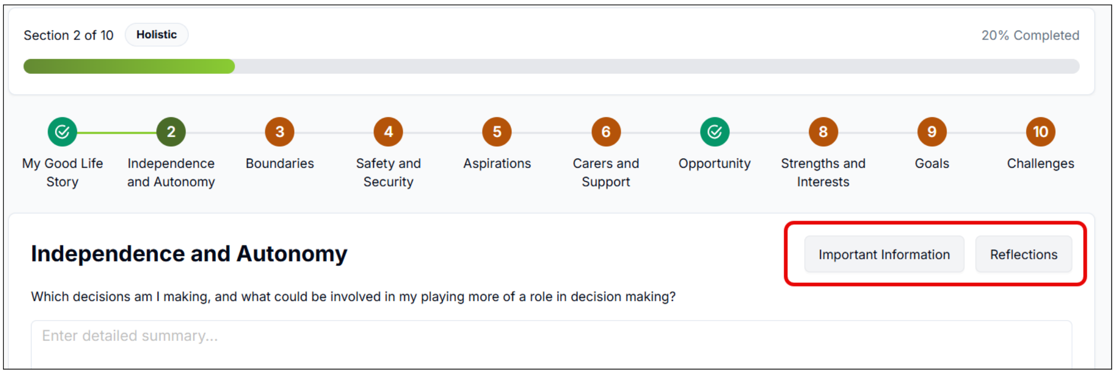

3. Once done, click **Save**

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.

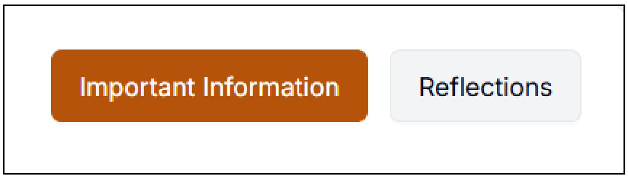
#### *3.3.1.1 Reflection, Support and Important Information Colour-Coding*

The *Reflection, Support* and *Important Information* tabs are colour-coded, so you can instantly see whether they have been wholly or partially filled out.

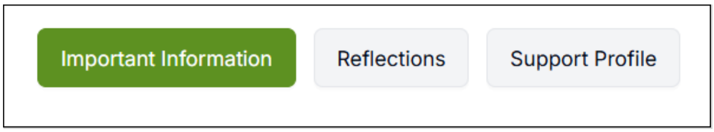
- **Light Grey**: This signifies that no information has been added to the respective section:




- **Rust Colour:** This signifies the respective section has been partially filled out:



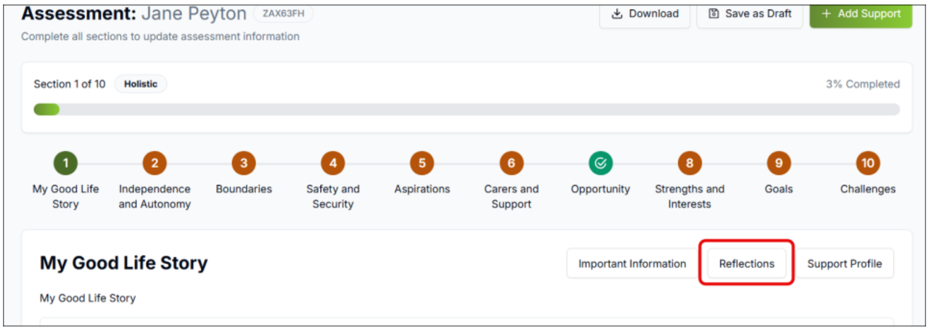
- **Green**: This signifies the respective section has been completely filled out:




### 3.3.2 Reflections

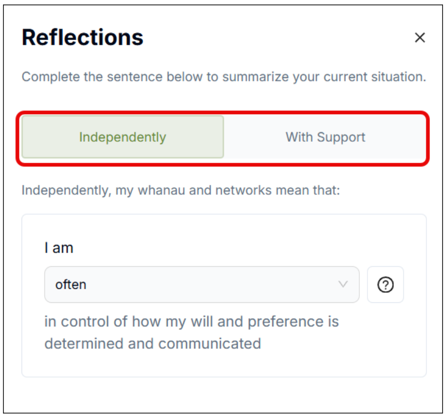
To record reflections:

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

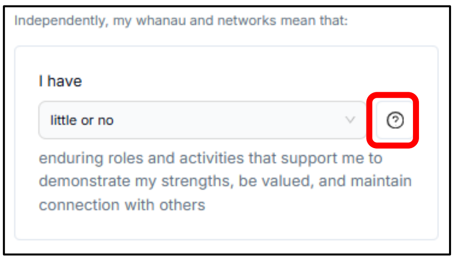



2. The *Reflections* panel will slide open from the right, enabling you to select the appropriate responses

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 from each tab, then click **Close**:


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

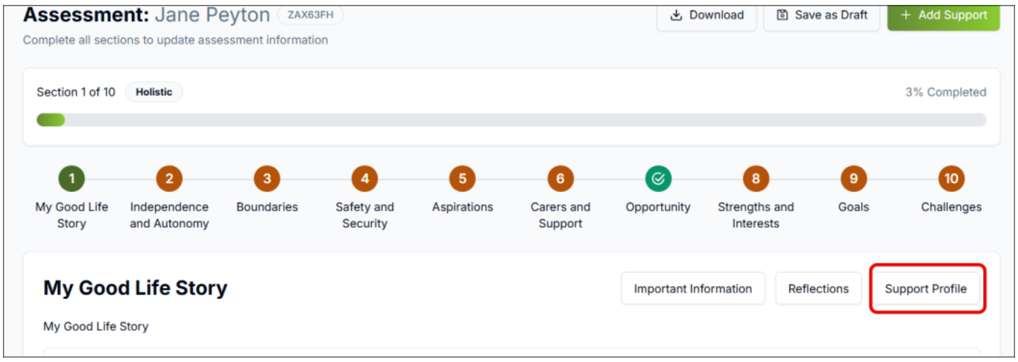
7. Once all answers have been entered, click the **X** to close the *Reflections* tab and the information will save automatically.

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.

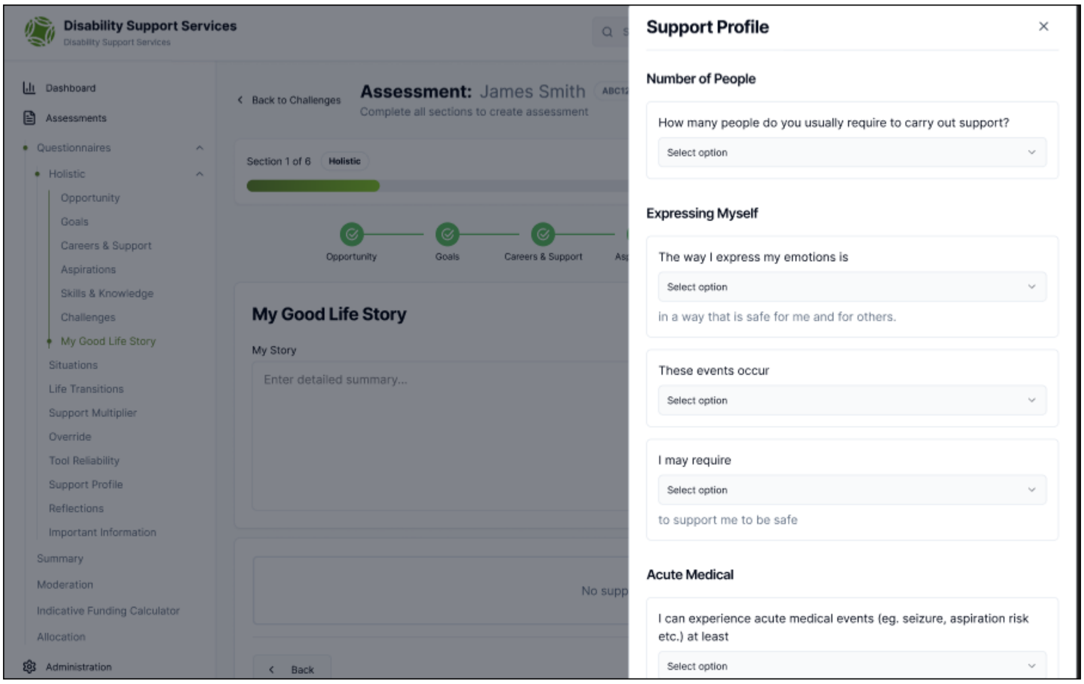
### 3.3.3 Support Profile

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**

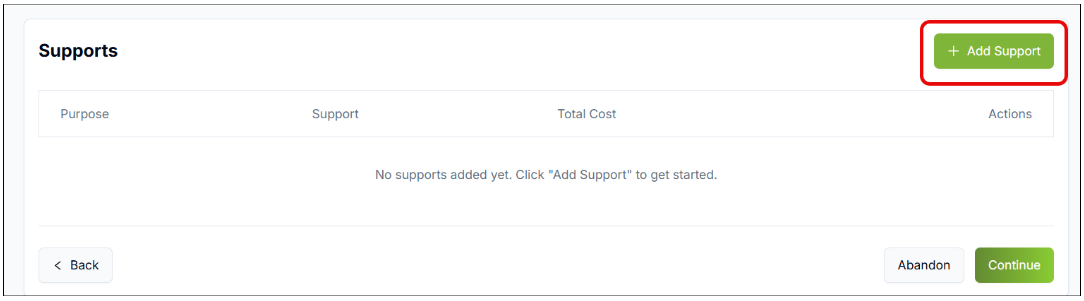
As you proceed through the Assessment, you can click on the **Support Profile** from the lefthand navigation to enter information.

### 3.3.4 Support

You can addsupport lines to the Disabled Person's *MyDSS 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:

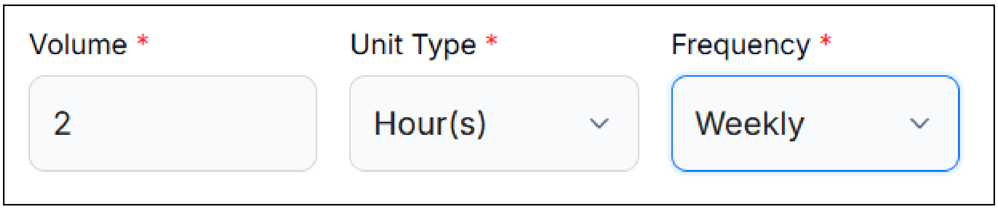
    a. *Area:* Select the appropriate 'Area' for the support which captures the support category.

    b. *Purpose:* 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. *Support:* Details of the support, e.g. *A cleaner to come in twice a week*

    d. *Support Start/End Date:* The start and end dates of the required support

    e. *Volume, Unit Type* and *Frequency:* 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 = Weekly, that means the Disabled Person requires the support for two hours every week:




    f. *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. *Managed By:* Who the support will be managed by

    j. *Provider:* The Provider (if applicable) who will be involved in the delivery of this support as part of the Disabled Person's My DSS Funding Plan.

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

e. You can enter any additional notes in the *Notes* field

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:


You can edit, view or delete a support by clicking the respective icons:

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

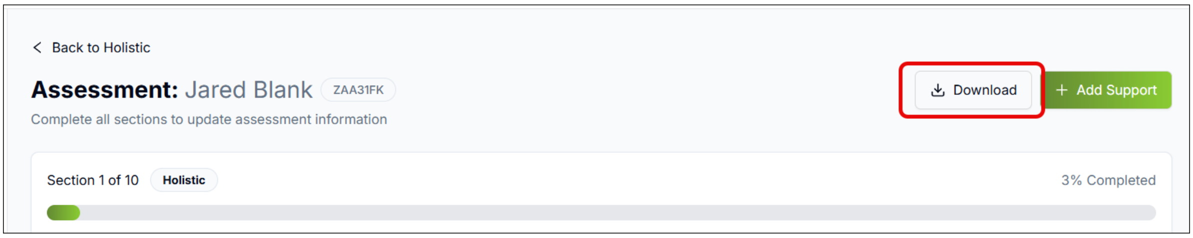
## 3.4 Summary

Once you have completed the *Holistic* section and click **Continue**, the application will take you to the *Support Profile* page. Keep clicking **Continue** to move through *Reflections and Important Information.*

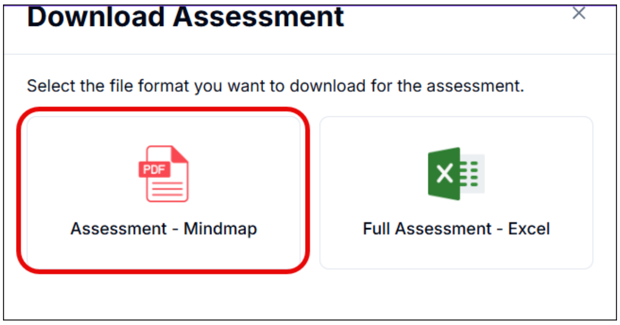
After these pages you will arrive on the *Summary* page, where you can view the information you recorded in the *Important Information*, *Reflections*, *Support Profile* sections and any *Supports* added.

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:



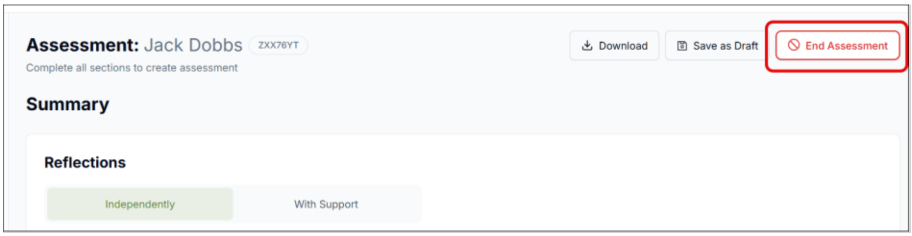

Downloaded assessments can be printed/emailed to the Disabled Person for confirmation the information is complete and correct.

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

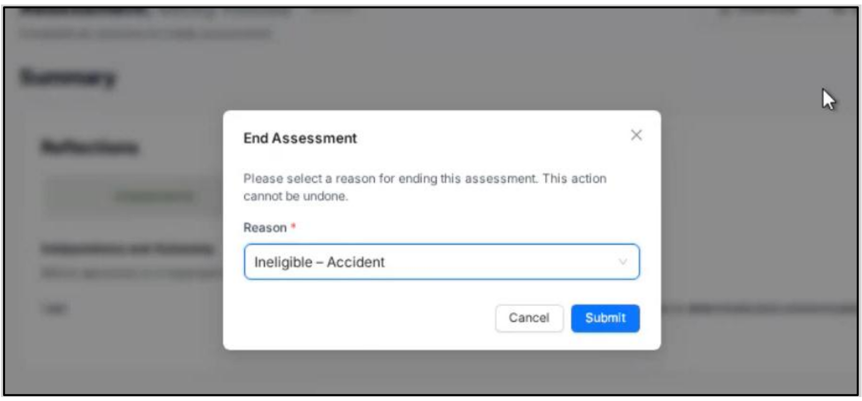

### 3.4.1 Ending an Assessment

If you want to end the assessment you are working on without completing the workflow:

1. Click the **End Assessment** button on the *Summary* screen:



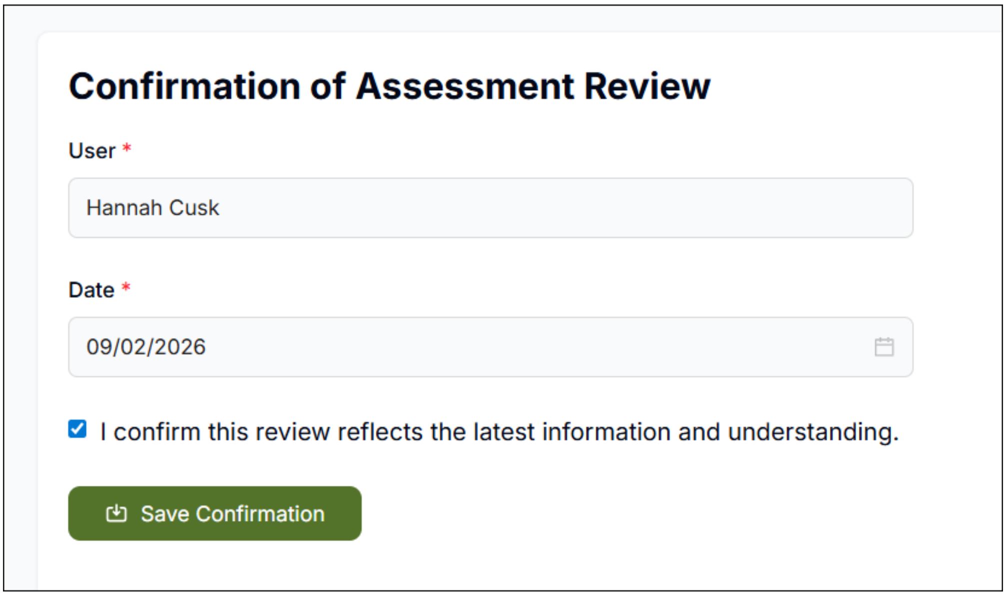

2. In the pop up that opens, select the reason for ending the assessment and click **Submit:**



3. The assessment will be marked as abandoned and removed from your *Action Required* grid.
4. The assessment will still be available to view from the assessment page in the dashboard.

## 3.5 Moderation (Confirmation of Assessment Review)

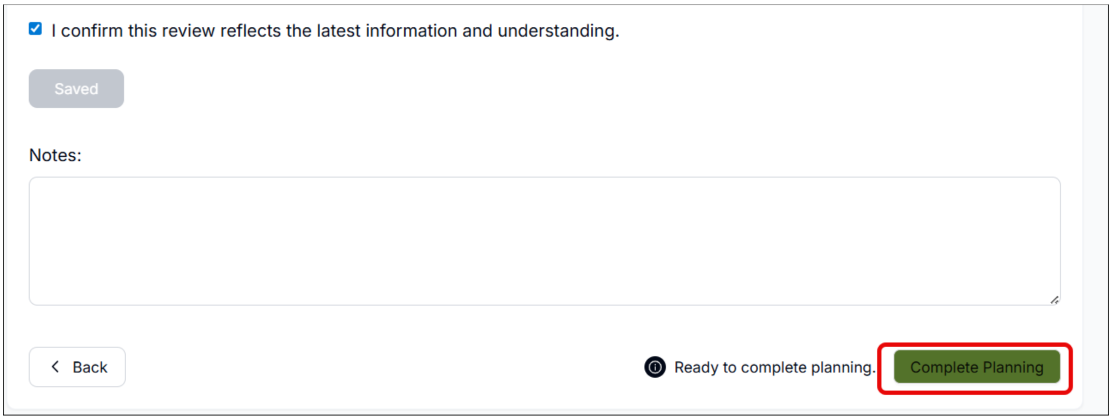
On the *Moderation* page, complete the Confirmation of Assessment by entering your name and the date of the assessment review, marking the checkbox, and clicking **Save Confirmation**:



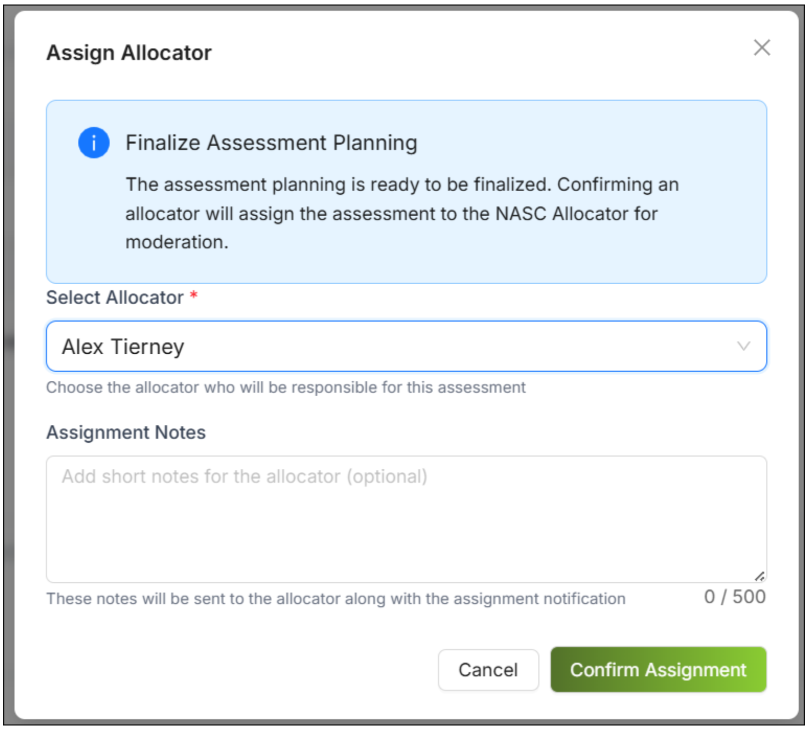

You can also add notes in the *Notes* field.

After saving confirmation, to complete the assessment:

1. Click **Complete Planning**:



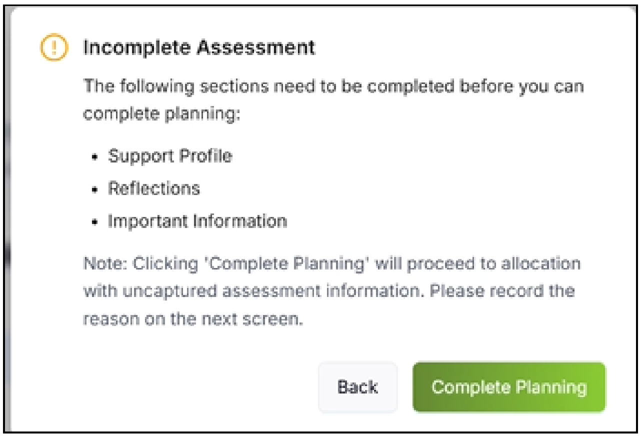
2. In the pop up, select the Allocator you want to assign this assessment to. You can also add assignment notes if you wish for the Allocator's attention. If you have both Assessor and Allocator roles, you can assign the assessment to yourself to continue:




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

### 3.5.1 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:

1. Click **Back**

2. This will take you back to the first section where information is missing, e.g. *Support Profile*

3. You can then proceed through the relevant sections and fill in the missing information

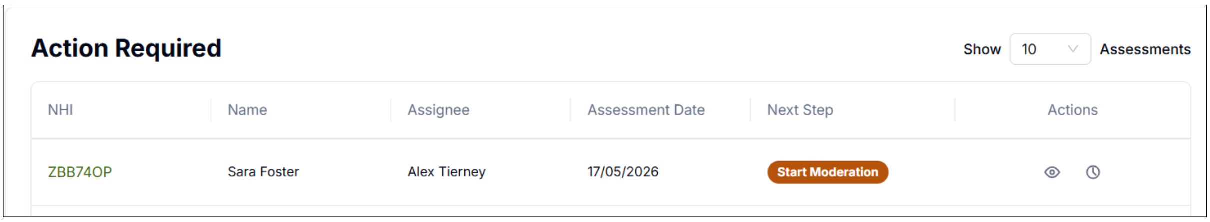
4. Once you return to the *Moderation* page, re-complete the Confirmation of Assessment by entering your name and the date of the assessment review, marking the checkbox, and clicking **Save Confirmation**.

5. Click **Complete Planning** 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 | Assignee | Assessment Date | Next Step | Actions |
|---|---|---|---|---|---|
| ZBB74OP | Sara Foster | Alex Tierney | 17/05/2026 | Start Moderation | |

To pick up that assessment:

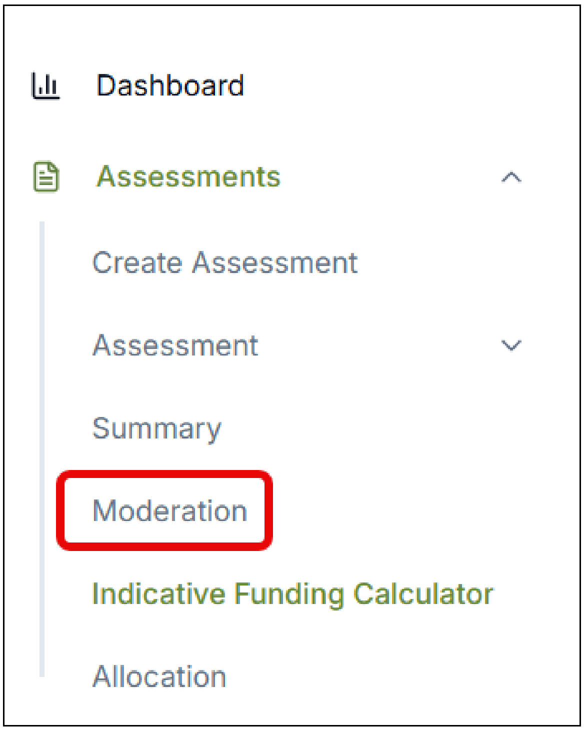
1. Click on the **Start Moderation** status

2. A pop up will appear asking you to confirm; click **Start Moderation**

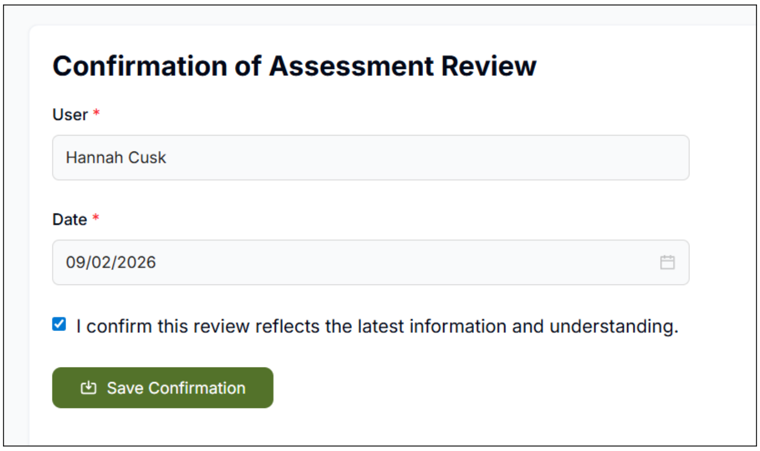
3. The assessment will open on the *Moderation* screen from where you can easily navigate through the assessment to review the recorded information

## 4.2 Moderating the Assessment

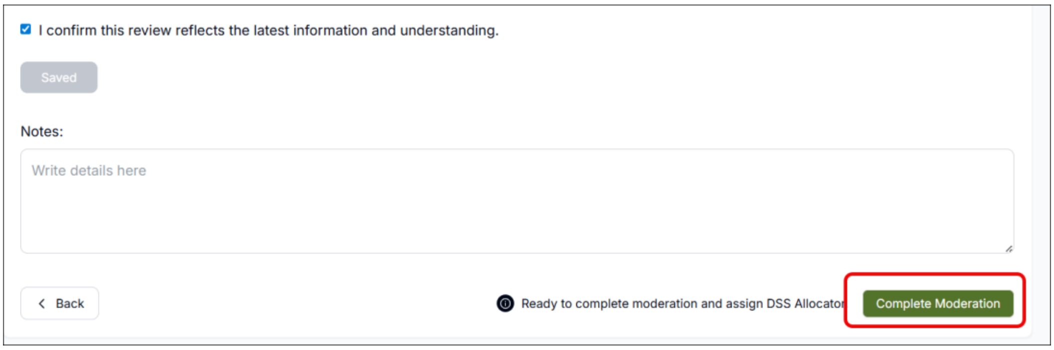
You should review the assessment information and confirm this assessment is ready for indicative range. Once you are happy with your review, click **Moderation** in the left-hand panel:



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):



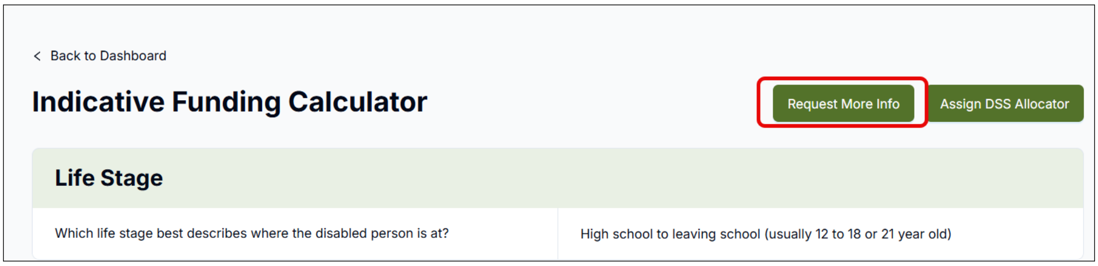

1. Replace the Assessor's name in the *User* field with your own name
2. Enter the date of your review in the *Date* field
3. Ensure the checkbox is marked and click **Save Confirmation**
4. Click **Complete Moderation:**



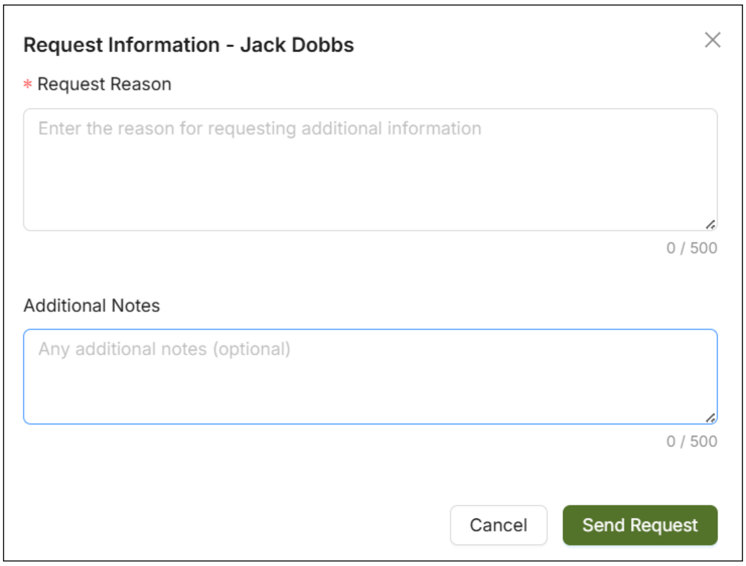

## 4.3 Requesting More Information

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

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

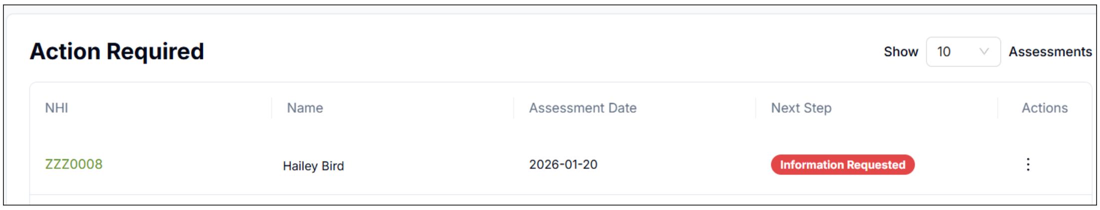


2. In the pop up that opens, type in the *Request Reason*. You can also enter additional notes for the Assessor if you wish:




3. Click **Send Request**

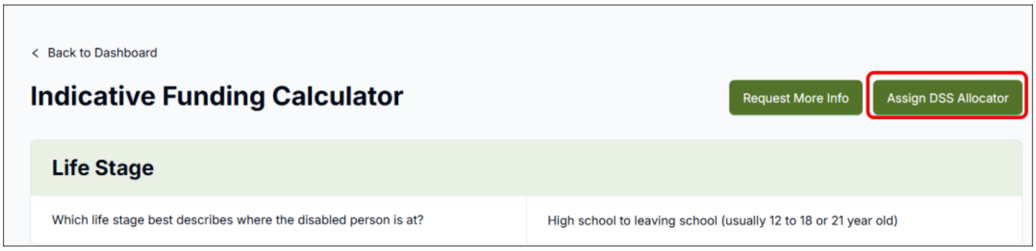
4. The assessment will then appear in the Assessor's *Action Required* section with a status of *Information Requested*:




## 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.

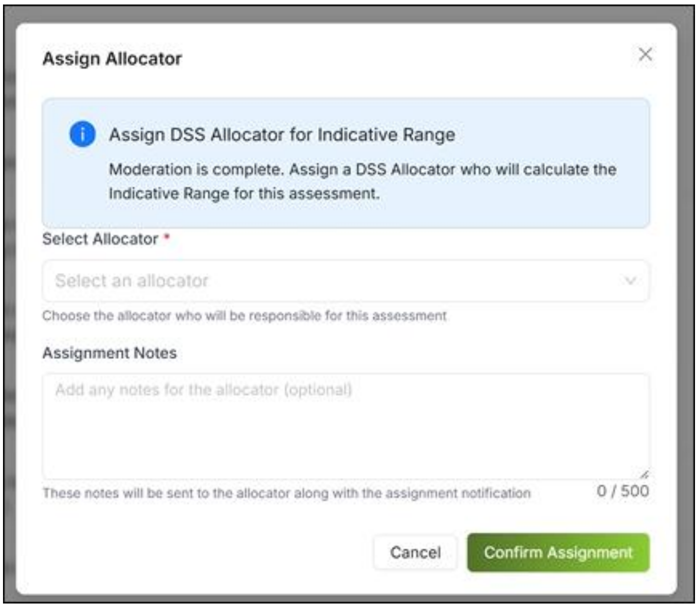
1. On the *Indicative Funding Calculator* screen, click **Assign DSS Allocator:**




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

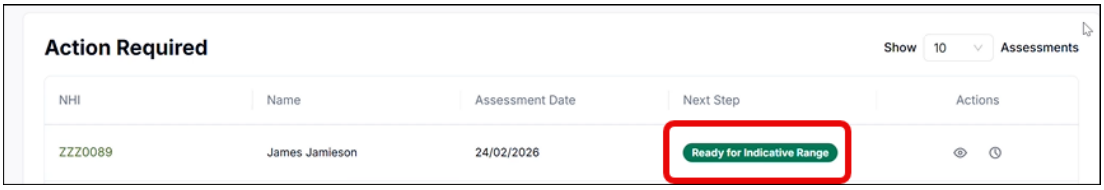
DSS Allocators have the option of exporting assessments individually or in bulk to support calculating the indicative funding range. Indicative range calculation is currently done through Excel.

## 5.1 Individual Assessment Export

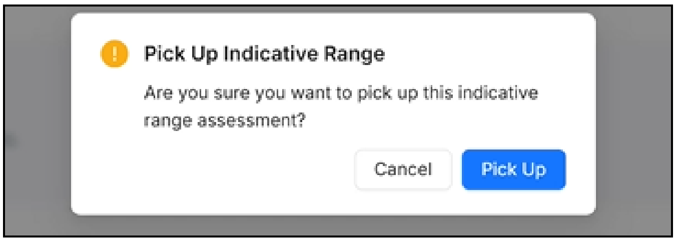
To export the results of a specific assessment:

1. Find the assessment on your *Dashboard*

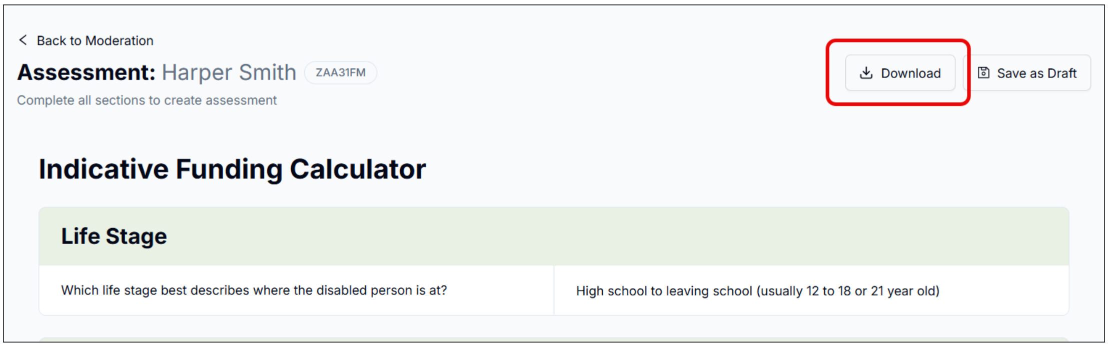
2. Click on the **Ready for Indicative Range** status next to the assessment:




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




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

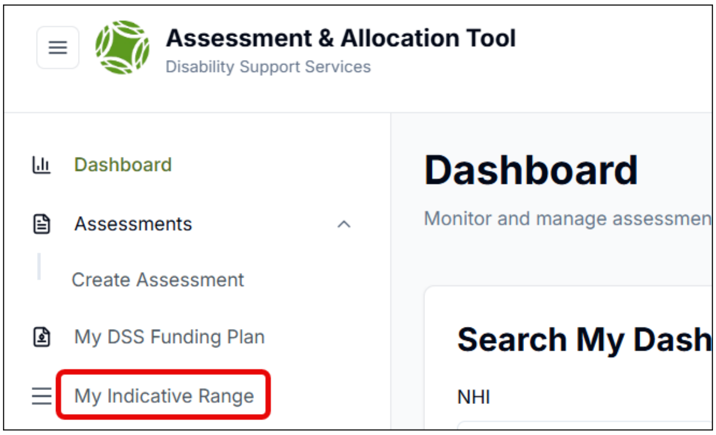



5. This will download a file which you can use to copy information into Excel.

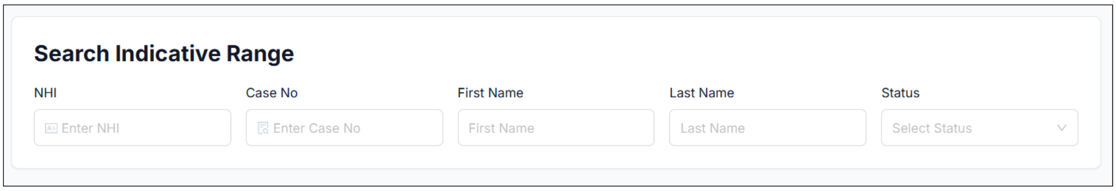
## 5.2 Bulk Assessment Export

To export assessments in bulk:

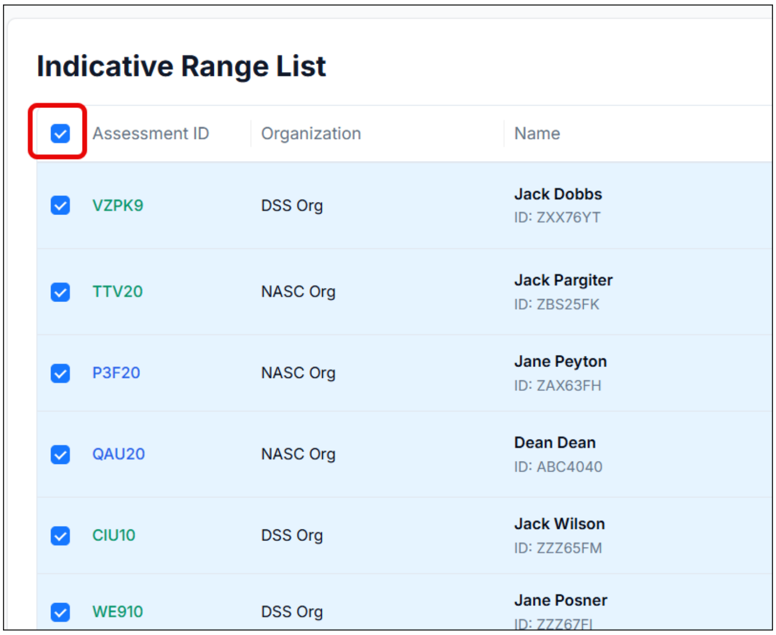
1. Click **My Indicative Range** in the left-hand menu:



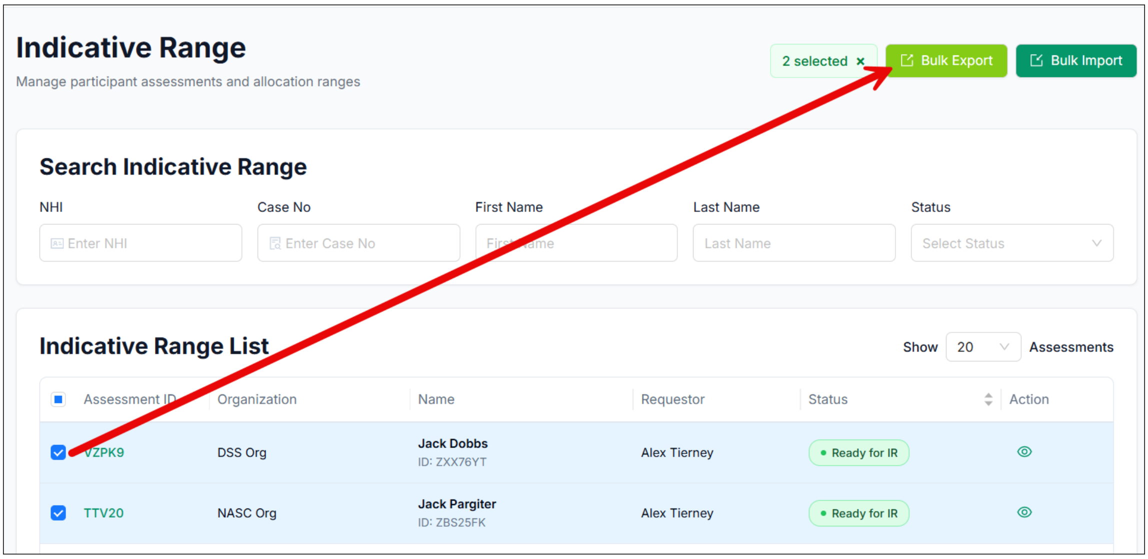

2. On this screen you can use the search facility to search for and filter the assessments you require by criteria including NHI, Case Number (i.e. the assessment ID) and Status (Status should equal *Ready for IR*):



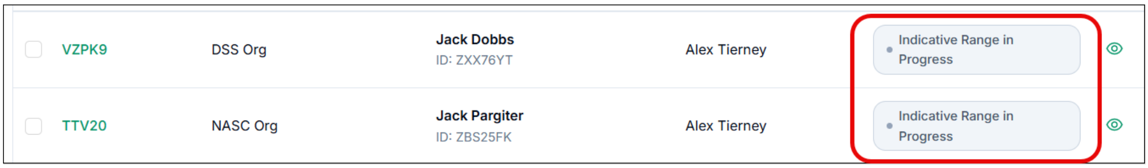

3. Once you have found the assessments you wish to export, mark the checkboxes next to them (***Useful Tip***: Marking the checkbox at the top left of the grid will select all assessments falling within your current search parameters):



4. Once you have selected your assessments, click **Bulk Export:**

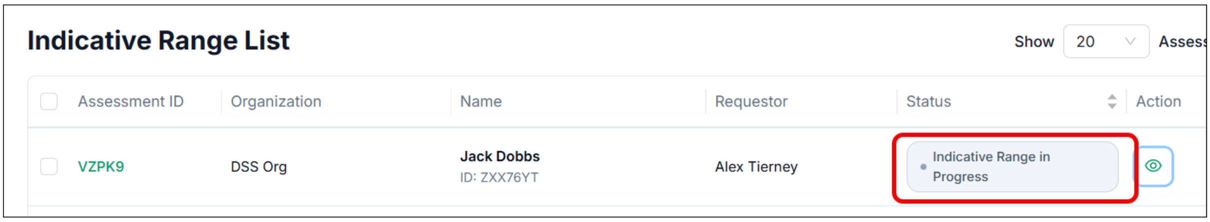



5. Once exported, the status of the respective assessments will update to *Indicative Range in Progress*:




6. If you want to see the Indicative Funding Calculator Information within each assessment, click the *Action* icon next to it:


7. You can also jump straight to the *Allocation* screen of each assessment by clicking on the status:

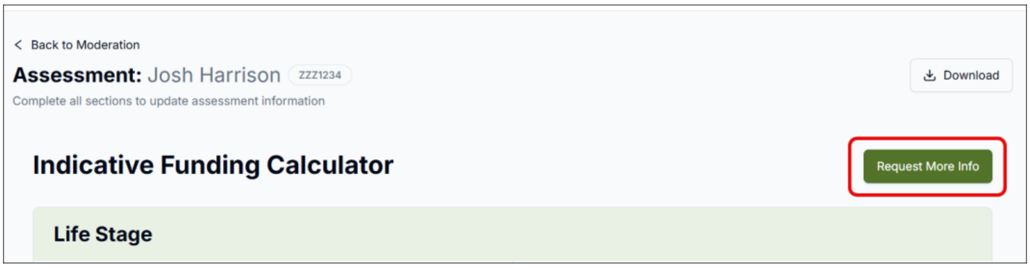


## 5.3 Requesting More Information

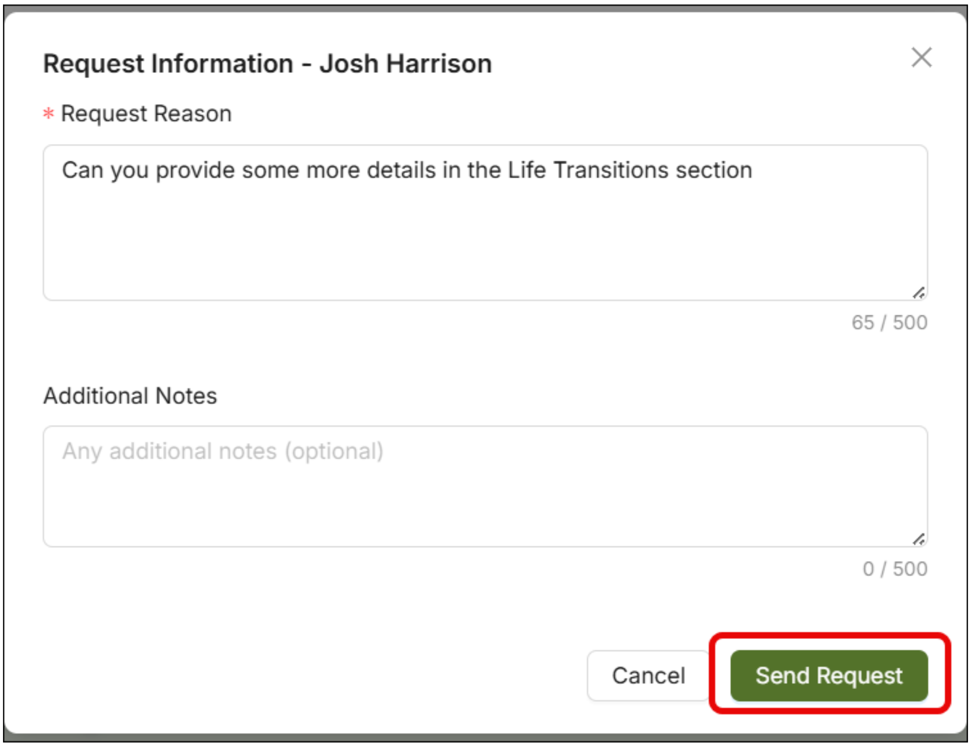
As a DSS Allocator, if you require more information from the Assessor who filled out the assessment:

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. A NASC/EGL Allocator will then review the range and apply any adjustments that may be necessary.

As a DSS Allocator, you can record the funding range in an individual assessment, or bulk import a funding range file which can automatically populate a range of assessments.

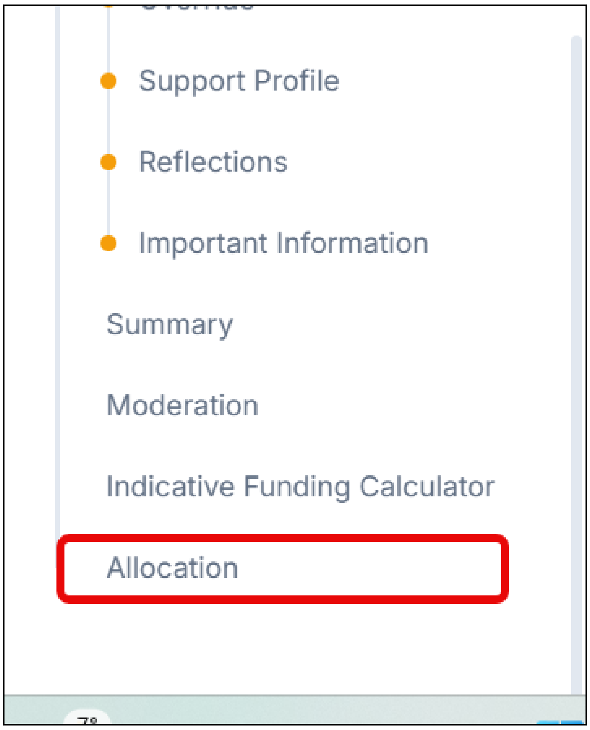
## 6.1 DSS Allocator Records the Funding Range in an Individual Assessment

To enter your Indicative Funding Range in an individual assessment in OBIR:

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

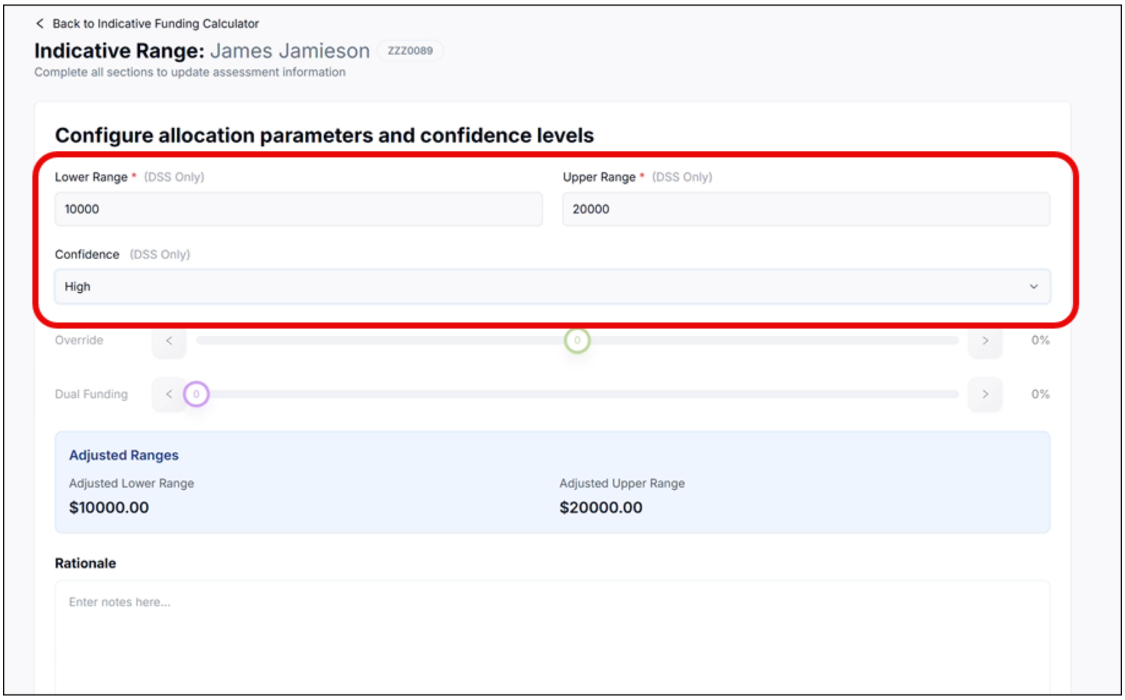
2. Open the assessment by clicking on the status

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:



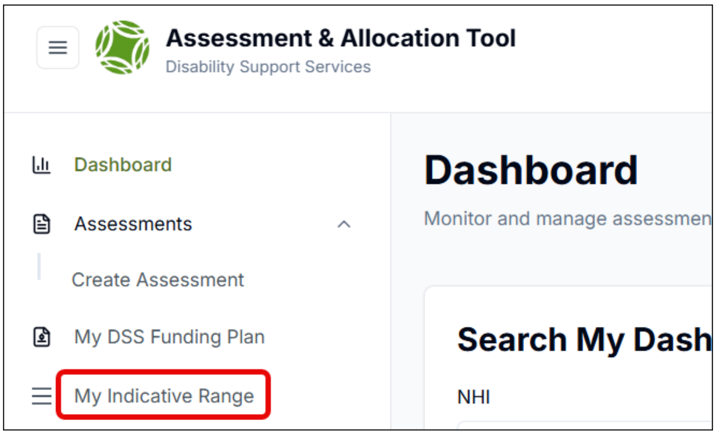

6. Click **Complete Indicative Range** to assign the assessment back to the Allocator:


## 6.2 DSS Allocator Imports Funding Range File

To import an indicative range file:

1. Firstly, the file intended for importation must include the following for each relevant assessment:
    a. Unique Identifier(Assessment ID)
    b. NHI
    c. First Name
    d. Last Name
    e. Lower Range
    f. Upper Range
    g. Rationale

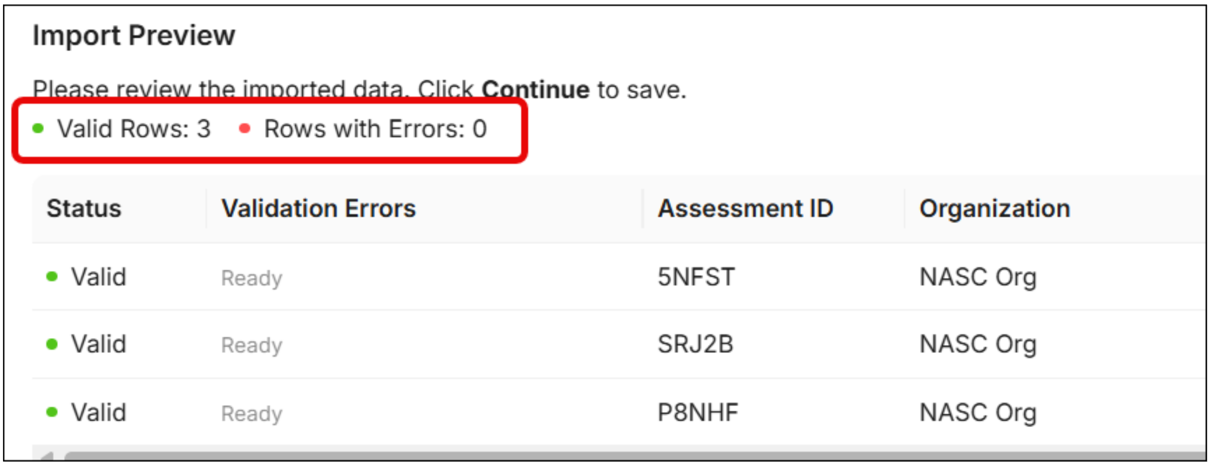
2. Click **My Indicative Range** in the left-hand menu:




3. On the *Indicative Range* screen, click **Bulk Import:**

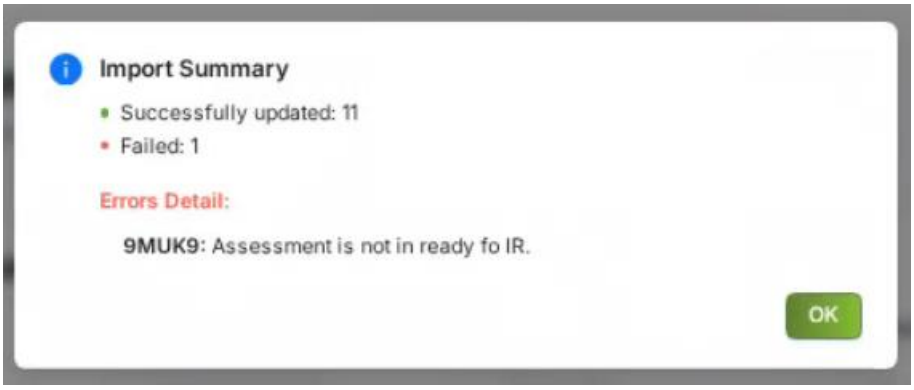

4. Search for and select your file on your local machine

5. Once your file has been selected, an Import Preview will show you whether there are any errors within the file:



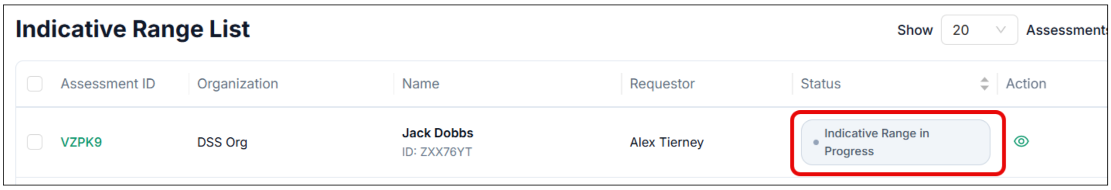

Any rows that contain validation errors will also display a validation reason. You should resolve the stated issues and then reupload the file before progressing

6. Click **Continue** and you will see an Import Summary. If any errors occurred during the import process, the system will display details of those:




7. Assessments where the information has been successfully imported will be automatically processed and assigned to the relevant NASC/EGL Allocators, and will disappear from the Indicative Range List.

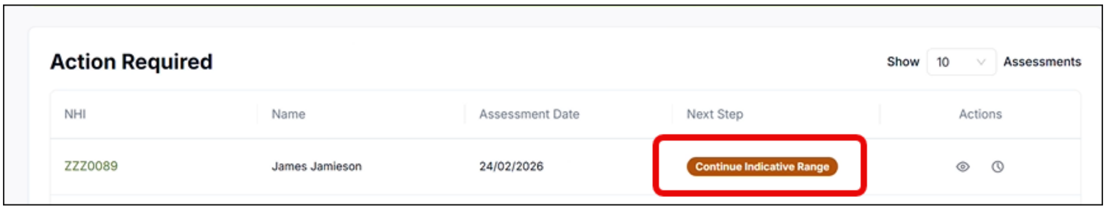
8. Assessments that were on the Indicative Range List that errored through the import process will remain on the list for you to resolve the related issue. Alternatively, you can click on the Assessment status, and enter the allocation information manually. Once completed the assessment will be removed from the Indicative Range List:




## 6.3 NASC/EGL Allocator Reviews the Funding Range

As a NASC/EGL Allocator:

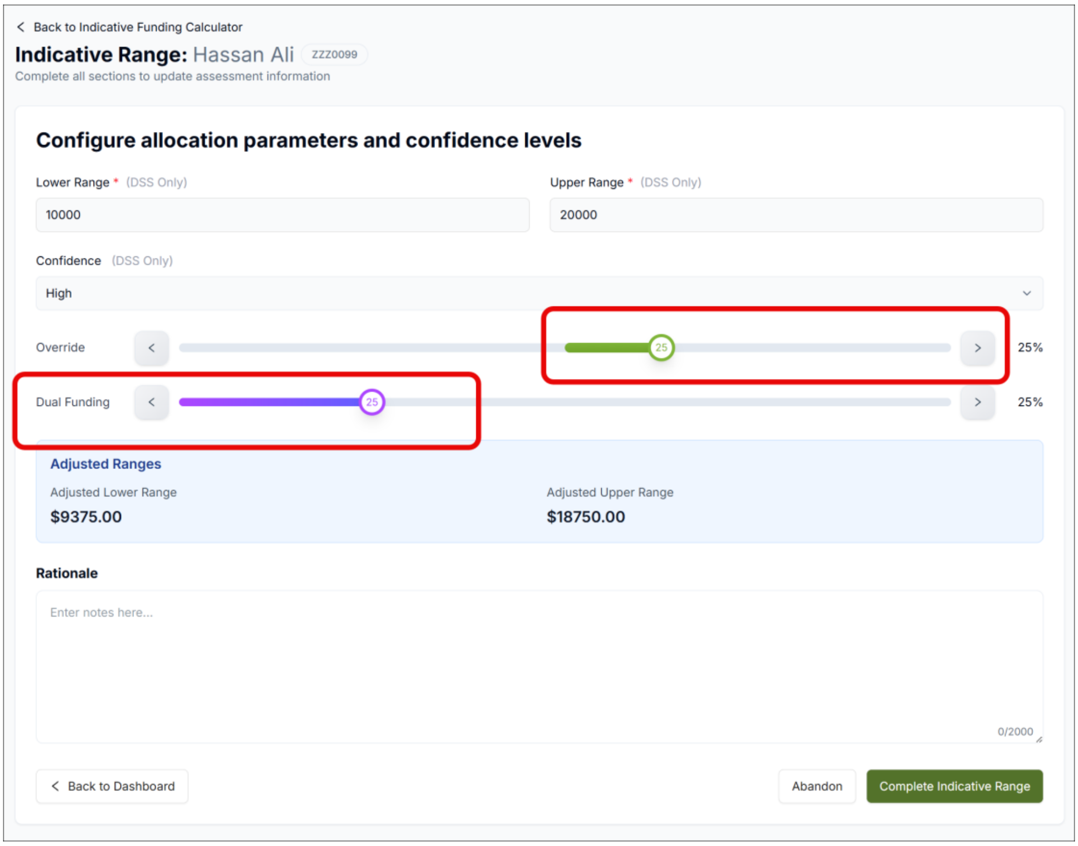
1. Find the assessment in your *Action Required* section on the *Dashboard* and click on the status **Continue with Indicative Range:**




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:



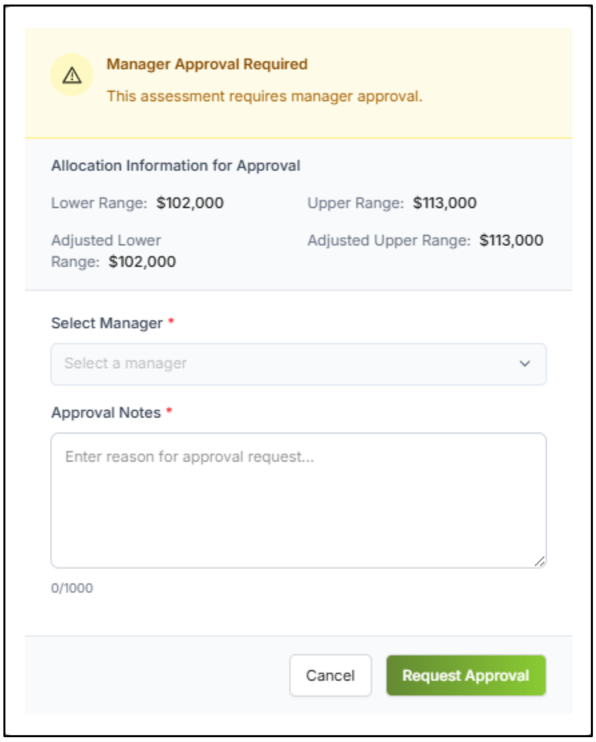

5. The adjusted ranges will be displayed below

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:**



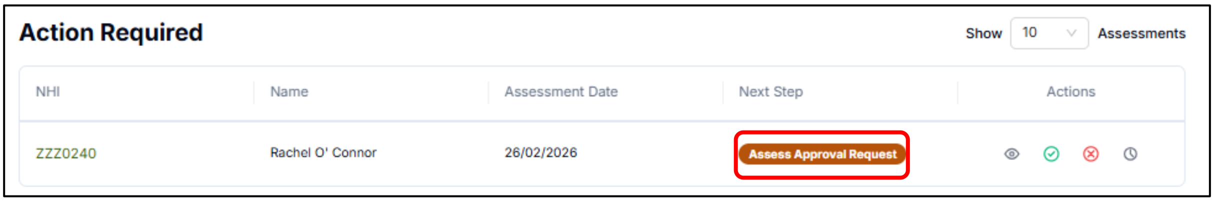

10. If the Manager declines the Indicative Range it will appear in your *Action Required* section with a status of *Declined Assessment*:


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

12. Adjust the range as per the Manager's comments.

## 6.4 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

    a. You can add notes to the approval if required

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

    a. You must add notes to the declined Indicative Range

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

6. Approving an indicative range will send the assessment to the assessor to complete the funding plan.

# 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 /DSS 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 completed by the NASC/EGL Allocator
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

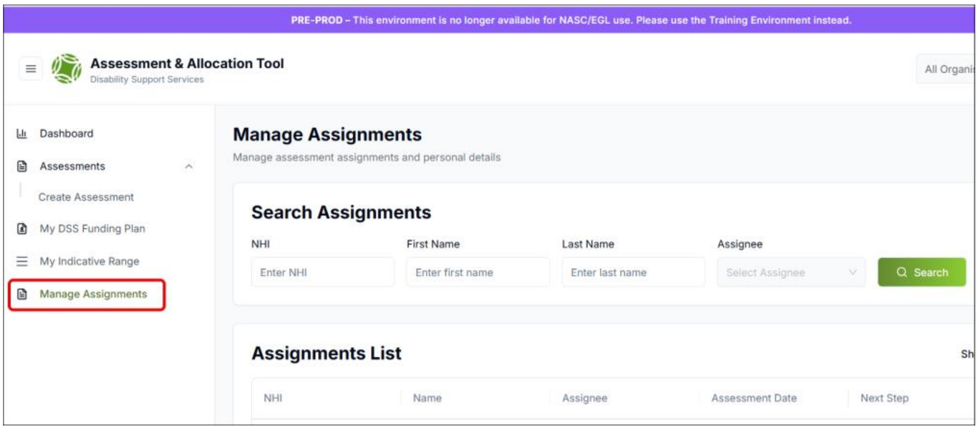
# 8 Managing Assignments

To assist managers in overseeing the assignment of assessments, there is a section in OBIR called *Manage Assignments*. Here, users with the role of Manager can view assessments no matter what stage they are at, and reassign them internally if necessary, e.g. if a key user is suddenly absent.

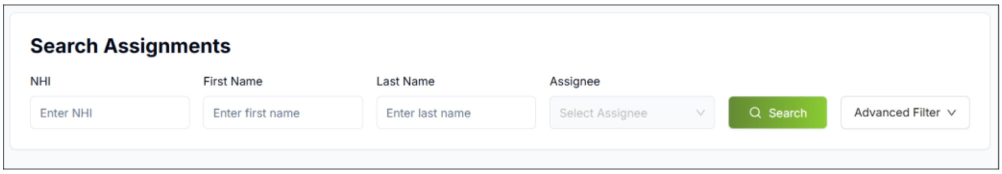
Managers can also update Personal Details within an assessment in case there is an information error, e.g. a mismatch between name and NHI.

To manage assignments:

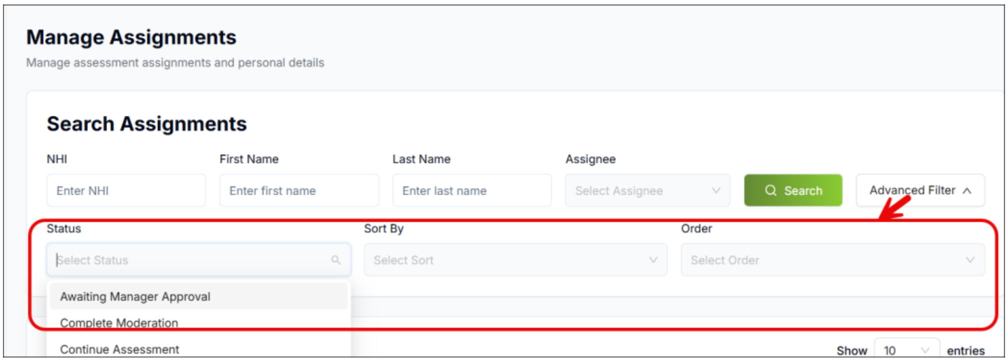
1. Click **Manage Assignments** in the left-hand menu:



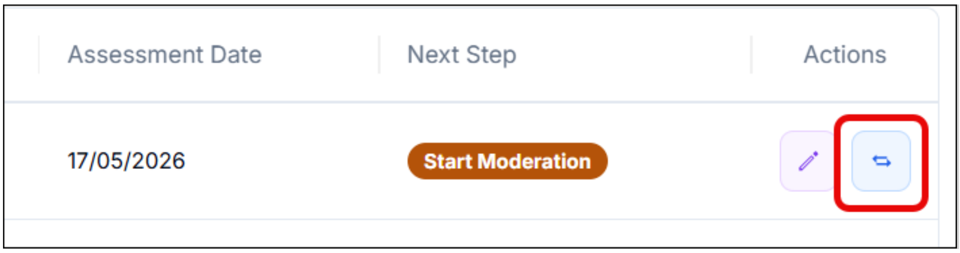

2. On the *Manage Assignments* screen you can search for the appropriate assessments using the search facility provided:



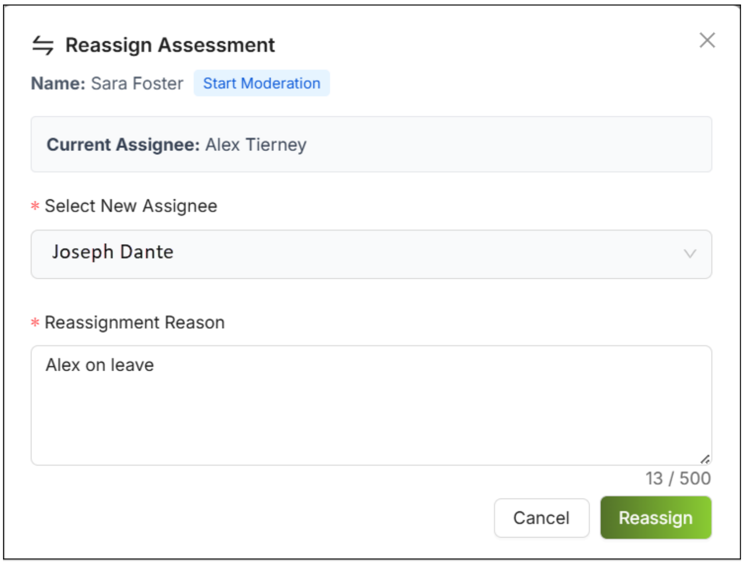

3. You can also access additional search filters by clicking the **Advanced Filter** button. This allows you to filter by Status; choose how you want the results sorted (e.g. by Next Step, i.e. Status or by Assessment Date); and specify the order (ascending or descending):



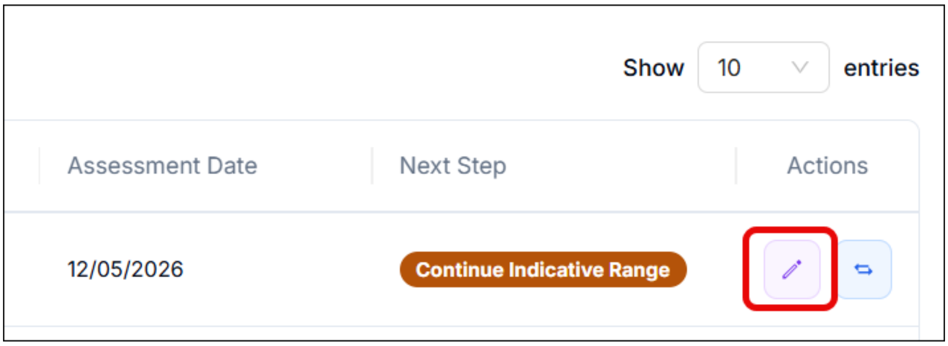
4. To reassign an assessment, click the **Reassign icon** next to it:



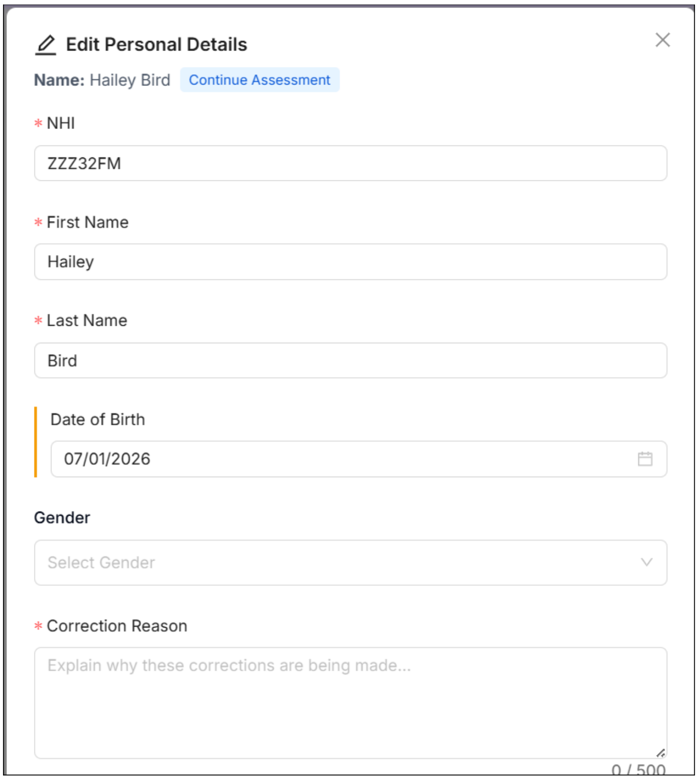

5. In the window that opens, a list of eligible assignees is presented based on the status of the assessment. Select the new assignee and give the reason for reassignment, then click **Reassign:**




6. To update the Disabled Person's key details on an assessment form, click the **Edit Details** icon next to the assessment:



7. In the window that opens, you can update their NHI, First and Last Name, DOB and gender. Provide a reason for the update in the *Correction Reason* field and click **Save Changes**:



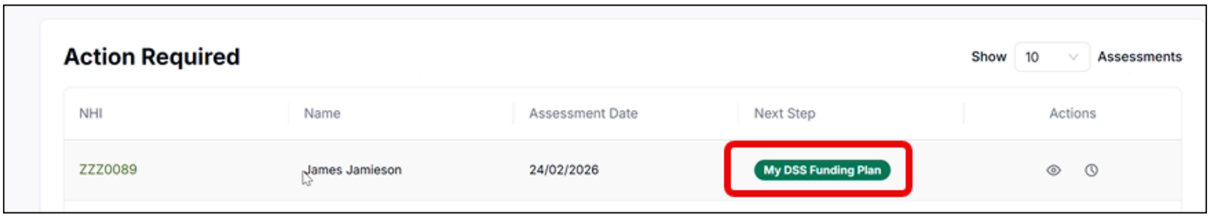
# 9 My DSS Funding Plan

## 9.1 Overview

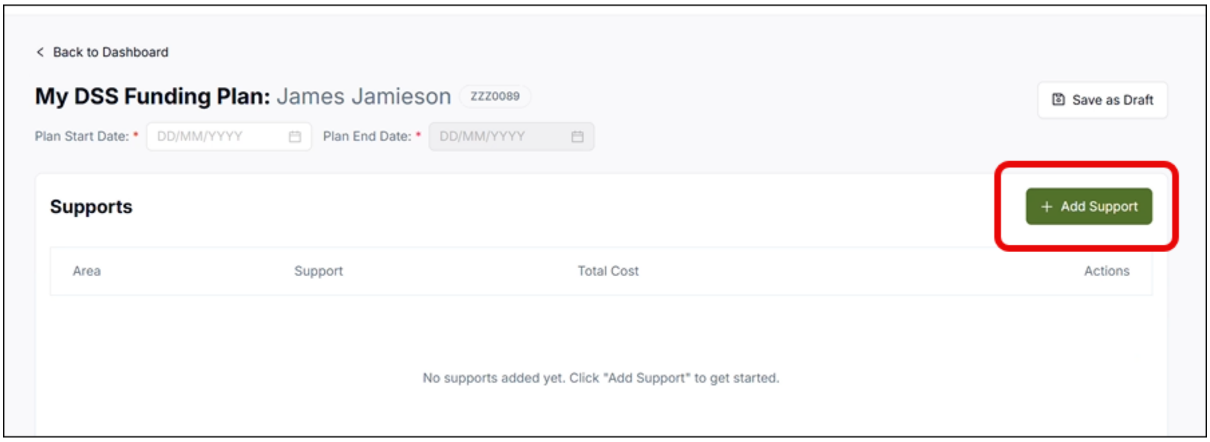
Following completion of the assessment and indicative funding range, the Assessor or Allocator can launch the Disabled Person's My DSS Funding Plan which will encompass the supports required, the costs of those supports, and whether the total cost falls within the indicative funding range.

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:




## 9.2 Adding a Support

When adding a support, you can capture:

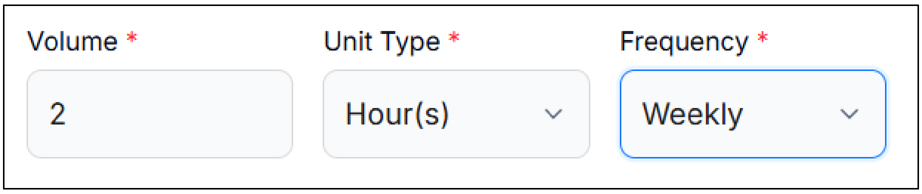
1. *Area:* Select the appropriate 'Area' for the support which captures the support category.

2. *Purpose:* 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. *Support:* Details of the support, e.g. *A cleaner to come in twice a week*

4. *Support Start/End Date:* The start and end dates of the required support

5. *Volume, Unit Type* and *Frequency:* 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 = Weekly, that means the Disabled Person requires the support for two hours every week:




6. *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. *Managed By:* Who the support will be managed by

10. *Provider*: The Provider (if applicable) who will be involved in the delivery of this support as part of the Disabled Person's MyDSS Funding Plan.

In the office use only section:

1. The Purpose Code is prepopulated

2. Add the categorisation

3. Mark whether the support is jointly funded

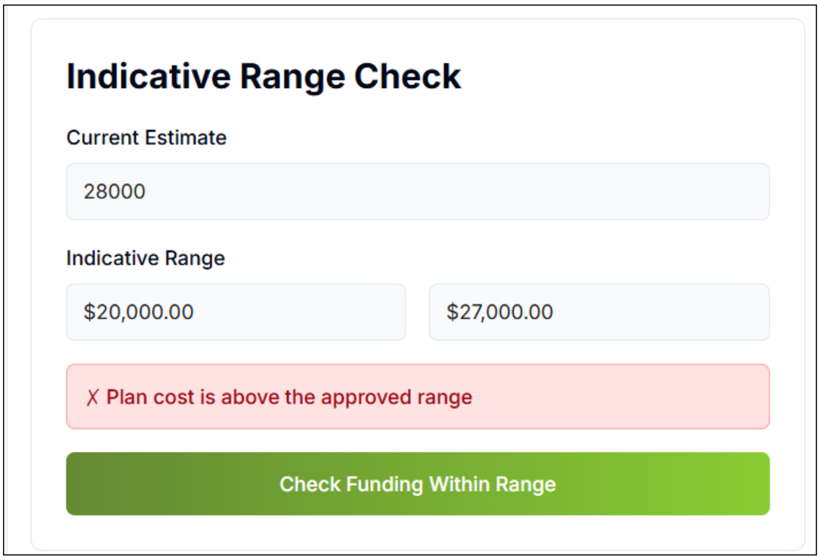
4. The percentage will be prepopulated and is relevant to self-managed host support lines only

5. You can add any notes you wish in the *Notes* field

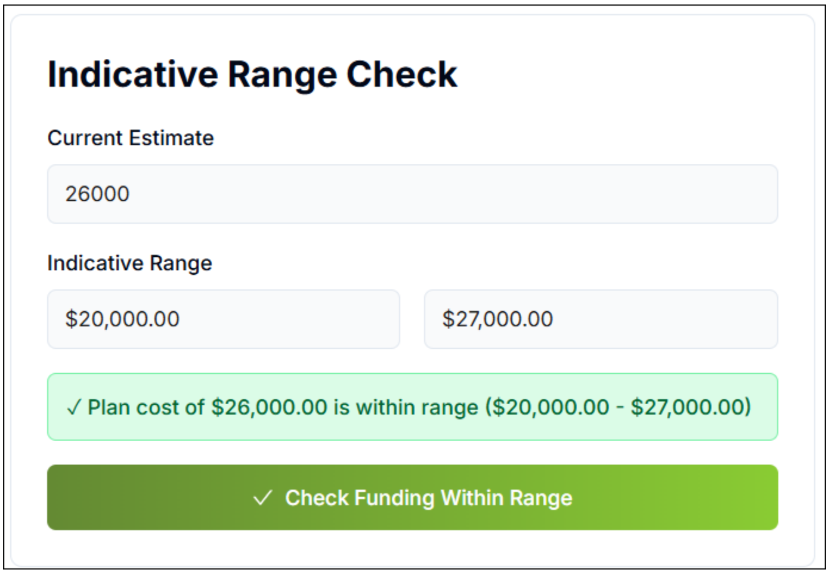
6. Once you are done, click **Add Support**

## 9.3 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:



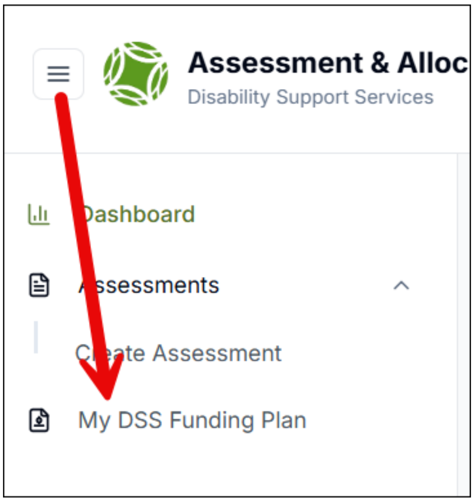
## 9.4 Saving the Funding Plan as a Draft

To save the My DSS Funding plan as a draft:

1. You need to first enter the Start and End Date of the plan. Please note, plans can be backdated, but if they are backdated by more than a week, you will need to give a reason for doing so

2. Click the **Save as Draft** button.


You can now view the plan in the My DSS Funding Plan section, which you can open from the left-hand panel:



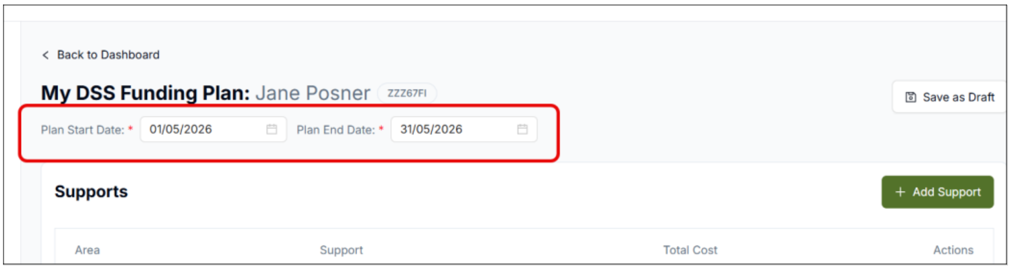

You can download the plan from this screen to give to the Disabled Person for review.

### 9.4.1 Backdating a Funding Plan by Over a Week

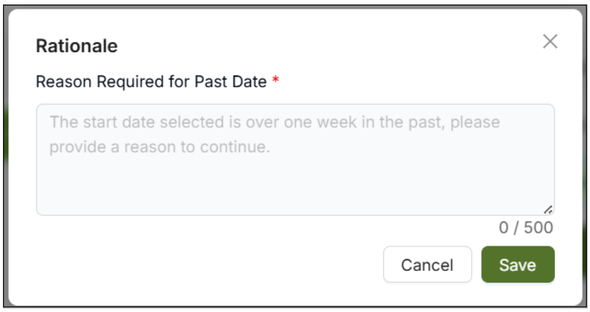
To backdate your MyDSS Funding Plan:

1. Open the relevant MyDSS Funding Plan

2. Use the *Plan Start Date* and *Plan End Date* fields to set the appropriate dates:



3. If you select a date greater than one week in the past, a pop up will appear, prompting you to provide a reason:




4. Enter your reason in the *Reason Required for Past Date* field

5. Click **Save**

## 9.5 Downloading a MyDSS Funding Plan

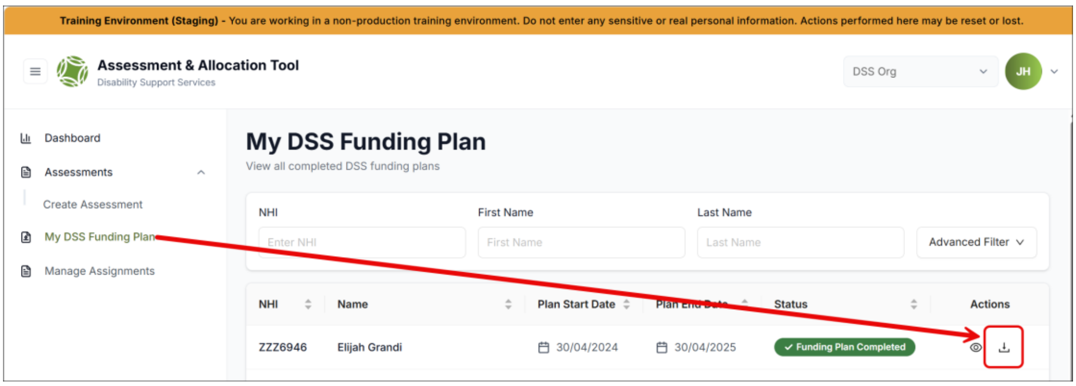
Downloading MyDSS Funding Plans can serve two purposes. One is to share the information with the Disabled Person, and the other is to provide it to official services involved in managing and delivering supports. Because these audiences need different types of information, you can choose from a range of templates when downloading the plans:

- **The MYDSS Funding Plan Standard:** This template is a user-friendly funding plan that can be supplied to the Disabled Person. You can download it in PDF as well as Excel format, to support easy printing by either the Disabled Person or the NASC/EGL organisation who can then provide it to the Disabled Person.

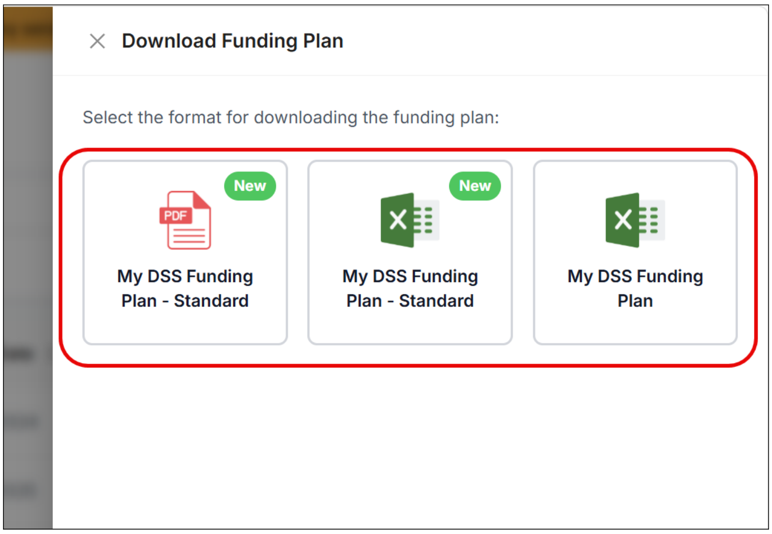
- **The MYDSS Funding Plan**: This template is for supplying to Providers and Hosts. It contains more information than the standard template, and is downloaded in Excel format exclusively.

To select the appropriate template for downloading:

1. Go to the *My DSS Funding Plan* screen and click the **Download icon** next to the plan you wish to download:



2. You will now be shown the three options for downloading. Simply click on the desired option to download it:




Within the downloaded file, you will be able to see the unique identifiers for the Funding Plan as well as for each support line within the plan. This is to ensure you can easily see which assessment the plan relates to. The convention for the unique identifiers is as follows:

- The core component of the Funding Plan ID matches the ID of the assessment the plan relates to.

- A single assessment may have multiple Funding Plans over time. Therefore, an extra number is added to the core ID of each Funding Plan. I.e. if an assessment has three Funding Plans, the first Funding Plan will have an extra number of 01, the second will have an extra number of 02, and the third will have an extra number of 03.

- Each Plan or Support Line within each Funding Plan will have its own ID, which is the full Funding ID plus another additional number for each Support Line. I.e. if there are three Support Lines, they will go from 01 to 03.

**The following is a sample illustrating an assessment with two Funding Plans that each contain two Support lines:**

Assessment ID - AB5DE

My DSS Funding Plan - AB5DE-01

Support Line 1: AB5DE-01-01

Support Line 2: AB5DE-01-02

My DSS Funding Plan - AB5DE-02

Support Line 1: AB5DE-02-01

Support Line 2: AB5DE-02-02

## 9.6 Disabled Person Sign Off

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

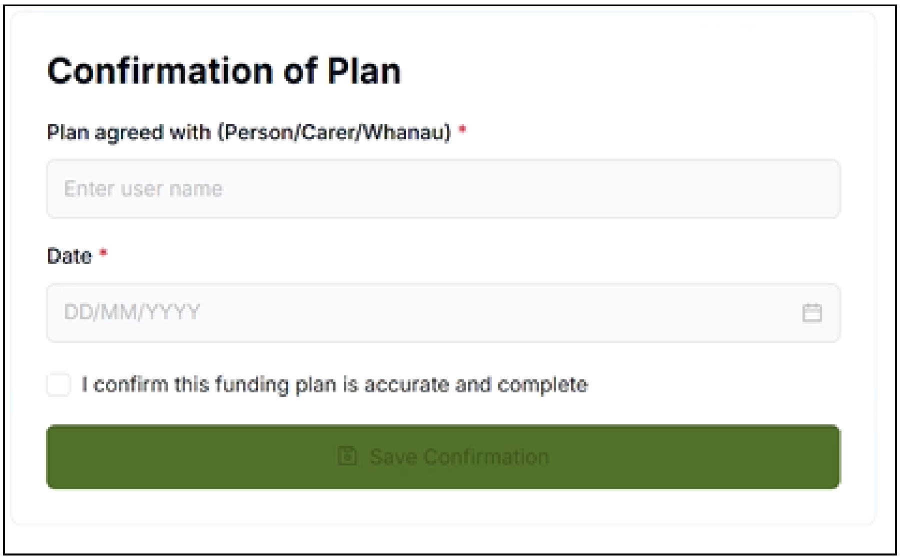
1. Open the Funding Plan

2. Enter the name of the Disabled Person or their carer/whanau in the *Plan agreed with (Person/Carer/Whanau)* field

3. Enter the date in the *Date* field

4. Mark *I confirm this funding plan is accurate and complete*

5. Click **Save Confirmation:**




## 9.7 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:**