

**Disability
Support Services**

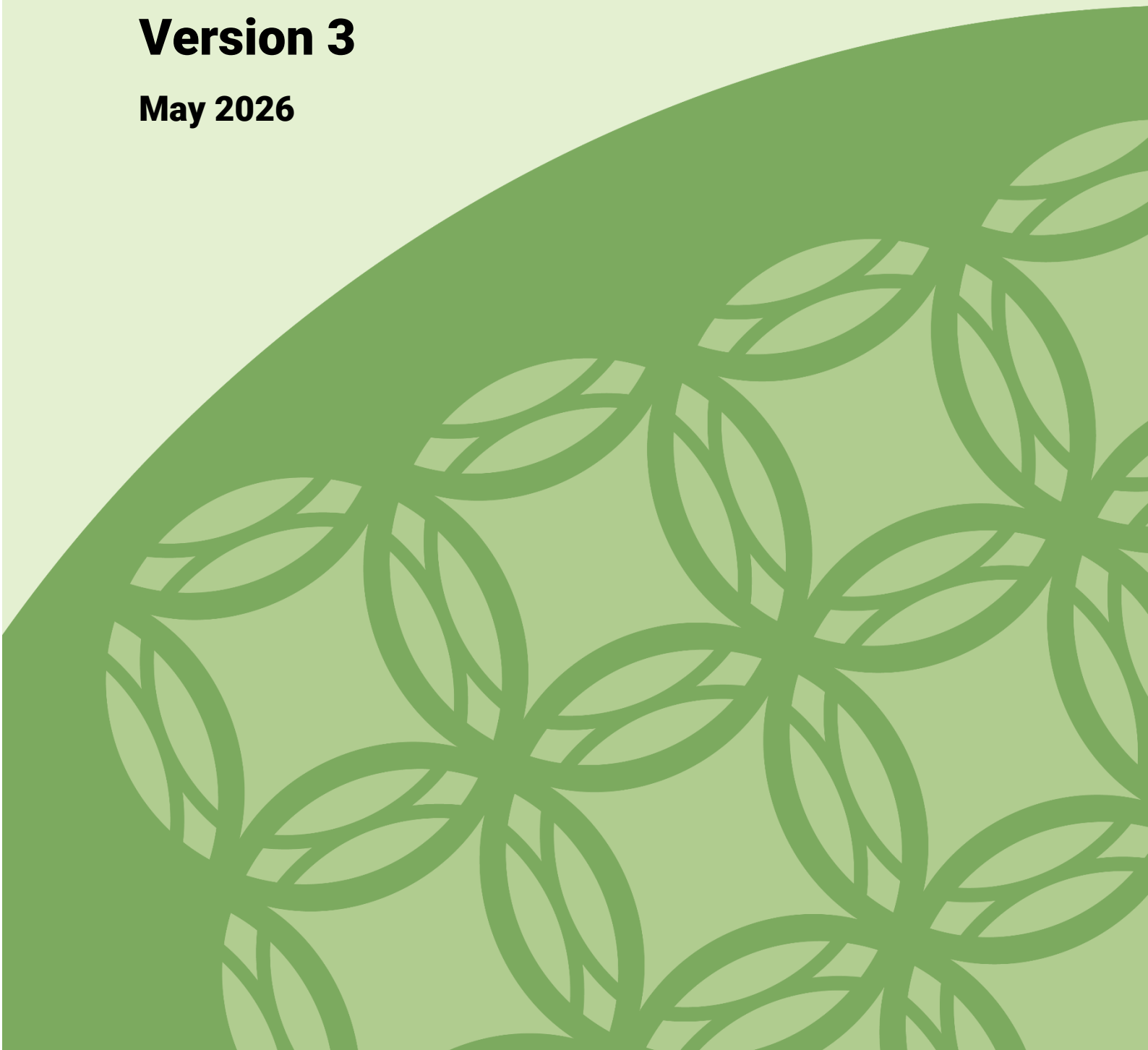


**MINISTRY OF SOCIAL
DEVELOPMENT**
TE MANATŪ WHAKAHIATO ORA

OBIR User Guide

Version 3

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Contents

1	Introduction	4
2	Dashboard	5
2.1	Searching the Dashboard.....	6
2.2	Assessment Statuses	7
2.3	Searching/Viewing Assessments	8
2.4	Action Required	10
2.4.1	Action Required Statuses.....	11
2.4.2	Picking up an Assessment.....	11
2.5	Recent People.....	12
3	Assessor Creates an Assessment.....	13
3.1	Assessment Creation.....	13
3.2	Holistic Section.....	15
3.3	Important Information, Reflections and Support Profile Sections.....	17
3.3.1	Important Information	17
3.3.2	Reflections.....	19
3.3.3	Support Profile	20
3.3.4	Support	21
3.4	Summary	23
3.4.1	Ending an Assessment.....	24
3.5	Moderation (Confirmation of Assessment Review)	25
3.5.1	Incomplete Assessments.....	26
4	Allocator Reviews the Assessment	28
4.1	Picking up an Assessment	28
4.2	Moderating the Assessment	28
4.3	Requesting More Information.....	29
4.4	Assigning the Assessment to DSS.....	30
5	DSS Allocator Exports Assessment Results for Indicative Funding Calculation	32
5.1	Individual Assessment Export.....	32
5.2	Bulk Assessment Export.....	33
5.3	Requesting More Information.....	35
6	Managing the Indicative Funding Range in OBIR.....	36
6.1	DSS Allocator Records the Funding Range in an Individual Assessment	36
6.2	DSS Allocator Imports Funding Range File.....	37
6.3	NASC/EGL Allocator Reviews the Funding Range	39

6.4	Manager Approval	42
7	Notifications	43
8	Managing Assignments.....	44
9	My DSS Funding Plan.....	47
9.1	Overview	47
9.2	Adding a Support.....	47
9.3	Support Costs Calculation	49
9.4	Saving the Funding Plan as a Draft	50
9.4.1	Backdating a Funding Plan by Over a Week	50
9.5	Downloading a MyDSS Funding Plan	51
9.6	Disabled Person Sign Off	53
9.7	Completing the Funding Plan	53

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, Rachel O'Connor
V3	18/05/2026		Alex Tierney 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

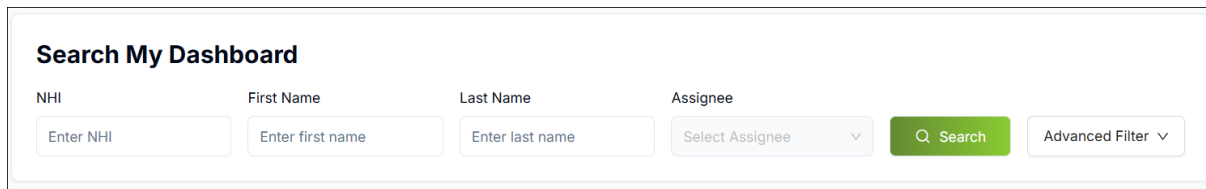
If assigned both roles all the above will be accessible.

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

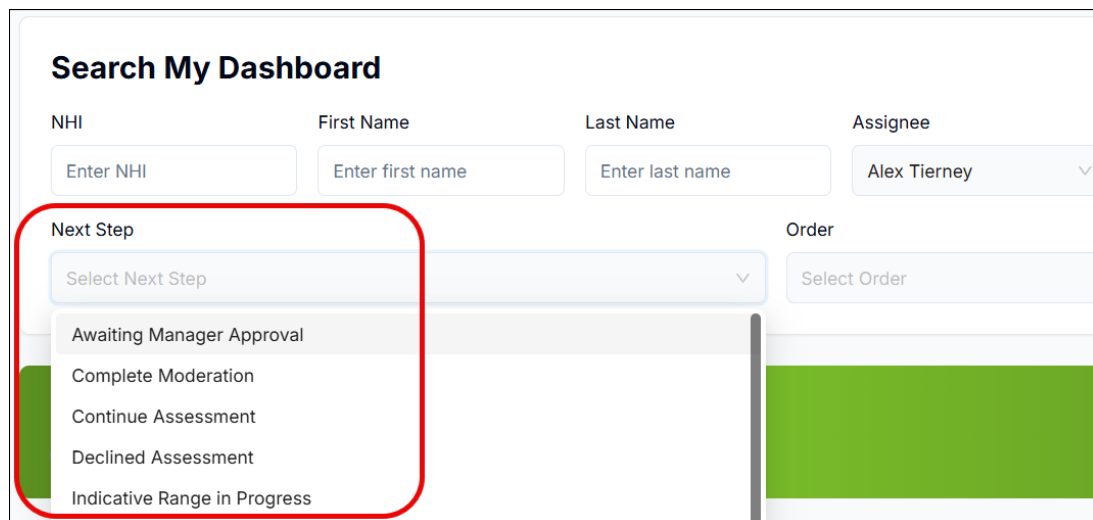
You can search for tasks and/or assessments created by or assigned to you by typing the Disabled Person's NHI, First Name, and/or Last Name in the respective fields or select from the assignee dropdown and clicking **Search**:



Search My Dashboard

NHI: First Name: Last Name: Assignee:

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



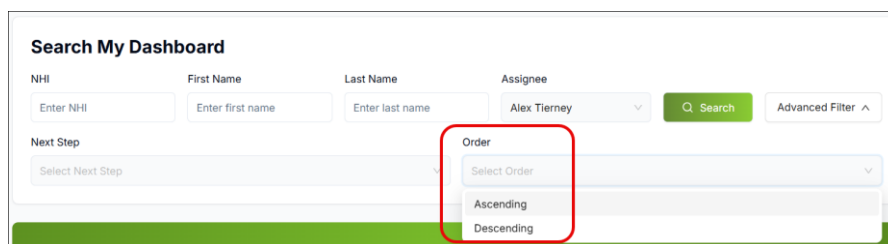
Search My Dashboard

NHI: First Name: Last Name: Assignee:

Next Step: Order:

- Awaiting Manager Approval
- Complete Moderation
- Continue Assessment
- Declined Assessment
- Indicative Range in Progress

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



Search My Dashboard

NHI: First Name: Last Name: Assignee:

Next Step: Order:

- Ascending
- Descending

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

Ready to start a new assessment?
Create a new assessment and begin the evaluation process. [+ Create Assessment](#)

Action Required Show 10 Assessments

NHI	Name	Assignee	Assessment Date	Next Step	Actions
ZAX63FH	Jane Peyton	Alex Tierney	23/02/2026	Continue Assessment	

< 1 >

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	

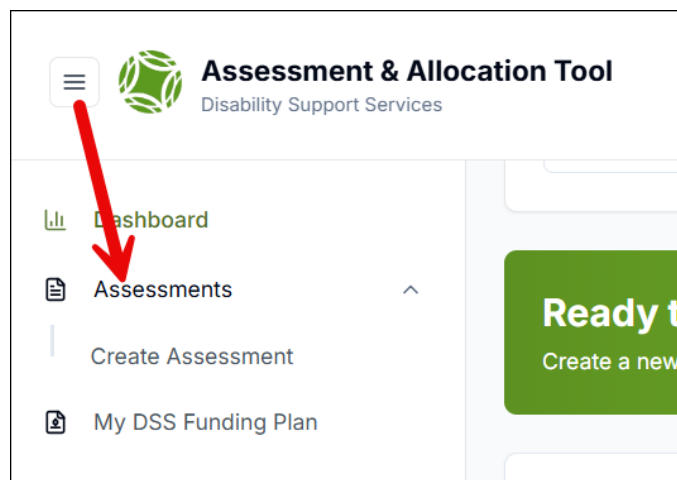
2.3 Searching/Viewing Assessments

You can easily view an assessment by doing the following:

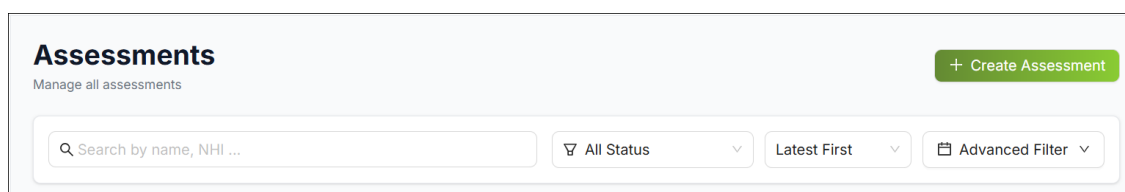
1. Ensure the lefthand panel is expanded by clicking the icon with three lines (top left corner):



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):

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

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

Download Assessment

Select the file format you want to download for the assessment.



Assessment - Mindmap



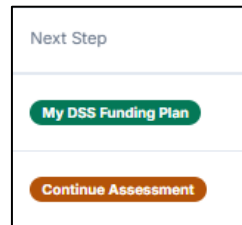
Full Assessment - Excel

10. -

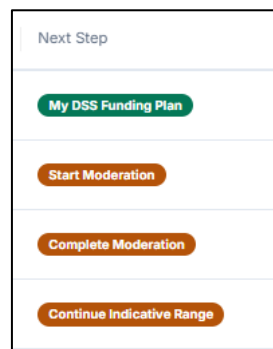
2.4 Action Required

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:

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:

Action Required

Show 10 Assessments

NHI	Name	Assessment Date	Next Step
ZZZ0210	Jane Peyton	23/02/2026	My DSS Funding Plan
ZZZ0085	Jonathan Burns	23/02/2026	My DSS Funding Plan

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

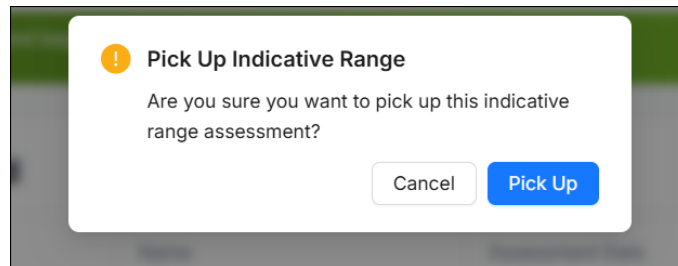
If an assessment has been assigned to you and is sitting in your *Action Required* section, you can pick it up by doing the following:

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

Next Step

[Ready for Indicative Range](#)

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:

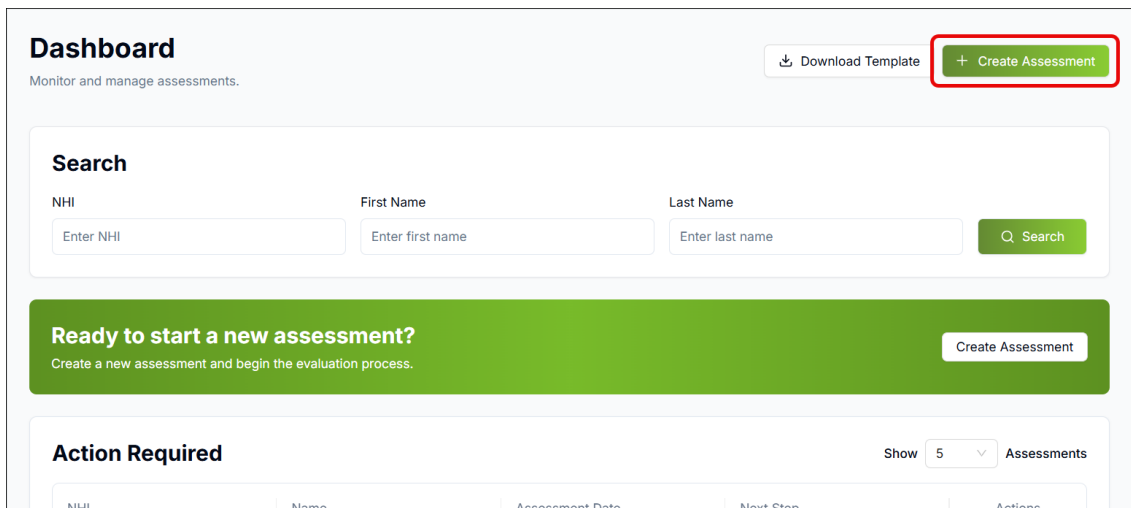


3 Assessor Creates an Assessment

3.1 Assessment Creation

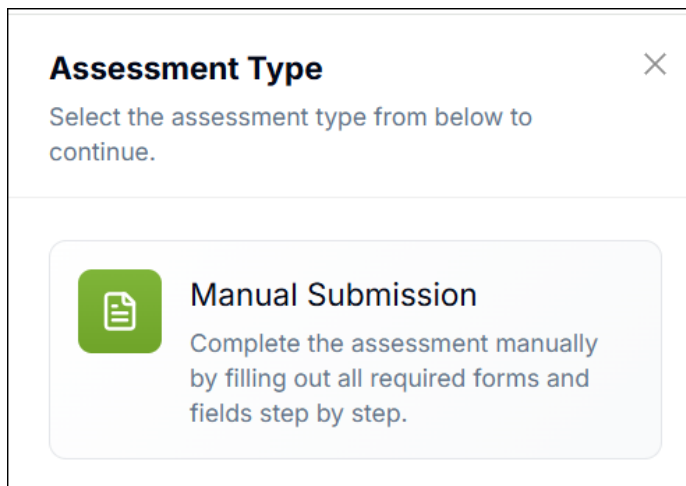
To create an assessment in OBIR:

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



The screenshot shows the OBIR Dashboard interface. At the top, there's a header with the title 'Dashboard' and a subtitle 'Monitor and manage assessments.' To the right of the header are two buttons: 'Download Template' and '+ Create Assessment', which is highlighted with a red rectangle. Below the header is a search section with three input fields: 'NHI' (with placeholder 'Enter NHI'), 'First Name' (with placeholder 'Enter first name'), and 'Last Name' (with placeholder 'Enter last name'). A green 'Search' button is to the right of these fields. Below the search section is a green banner with the text 'Ready to start a new assessment?' and a subtitle 'Create a new assessment and begin the evaluation process.' A 'Create Assessment' button is on the right of this banner. At the bottom, there's an 'Action Required' section with a 'Show' dropdown set to '5' and a link to 'Assessments'. Below this is a table with columns: 'NHI', 'Name', 'Assessment Date', 'Next Step', and 'Actions'.

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



The screenshot shows a modal window titled 'Assessment Type' with a close button (X) in the top right corner. The text inside says 'Select the assessment type from below to continue.' Below this is a list of options. The first option is 'Manual Submission', which is highlighted with a green border. It features a green document icon and the text 'Complete the assessment manually by filling out all required forms and fields step by step.'

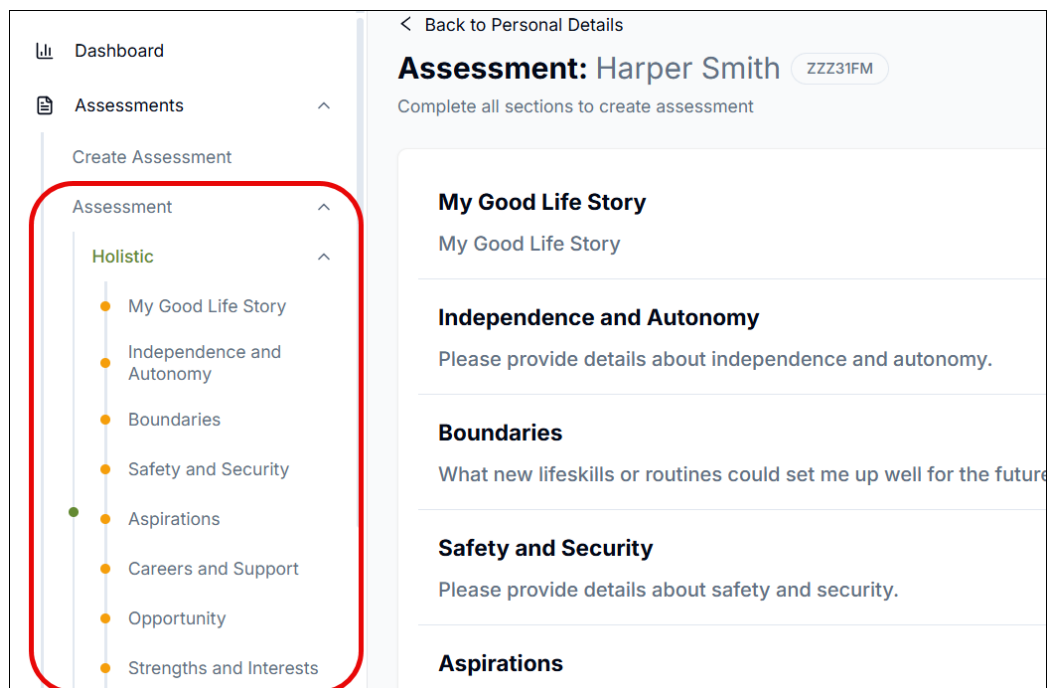
3. On the *Create Assessment* screen, enter the following details in their respective fields:
 - a. NHI of the Disabled Person
 - b. Date of the Assessment
 - c. The Disabled Person's First and Last Name
 - d. The Disabled Person's DOB
 - e. The Disabled Person's Gender (if you select *Any Other*, an 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**

Personal Details

NHI *	Assessment Date
ZBB740P	17/05/2026
First Name *	Last Name *
Sara	Foster
Date of Birth	Gender
11/02/1970	Female
Life Stage *	
Adulthood (25 to 64 years old)	
Plan Type *	
Standard Plan Selected	

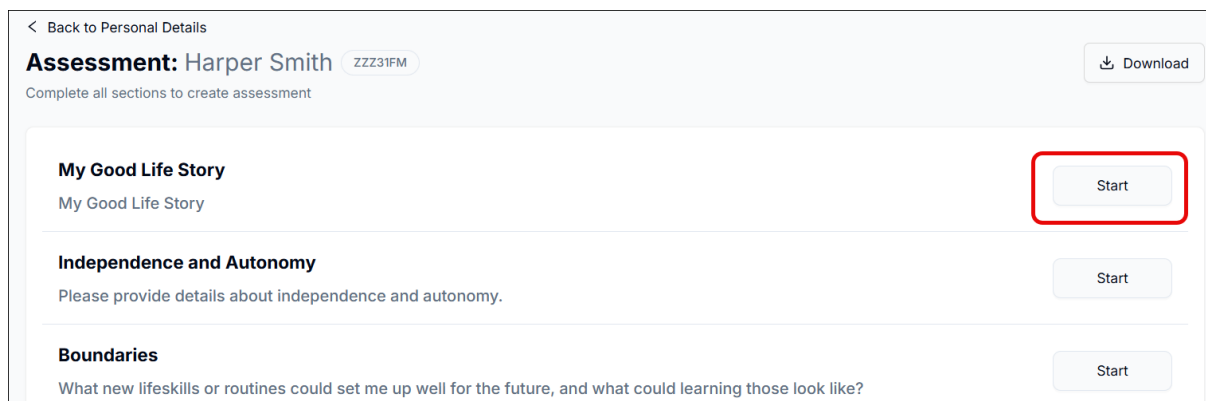
3.2 Holistic Section

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

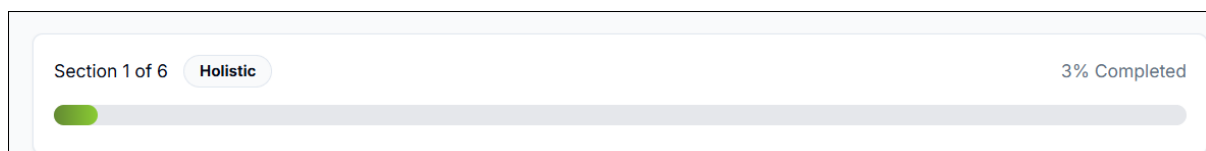


You will also see the different pages of the Holistic section displayed in the centre, with a **Start** button next to each stage.

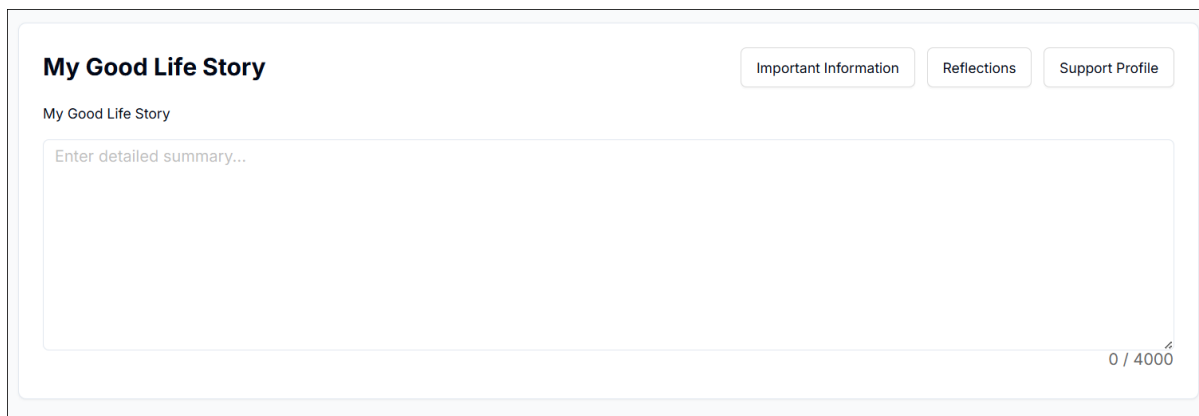
Click **Start** next to the desired page to enter information under that category:



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:



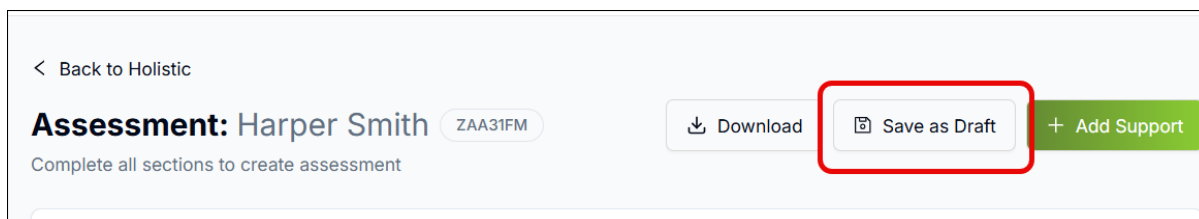
If you wish to make the free text field bigger, click on the bottom right-hand corner and drag the field down:



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.

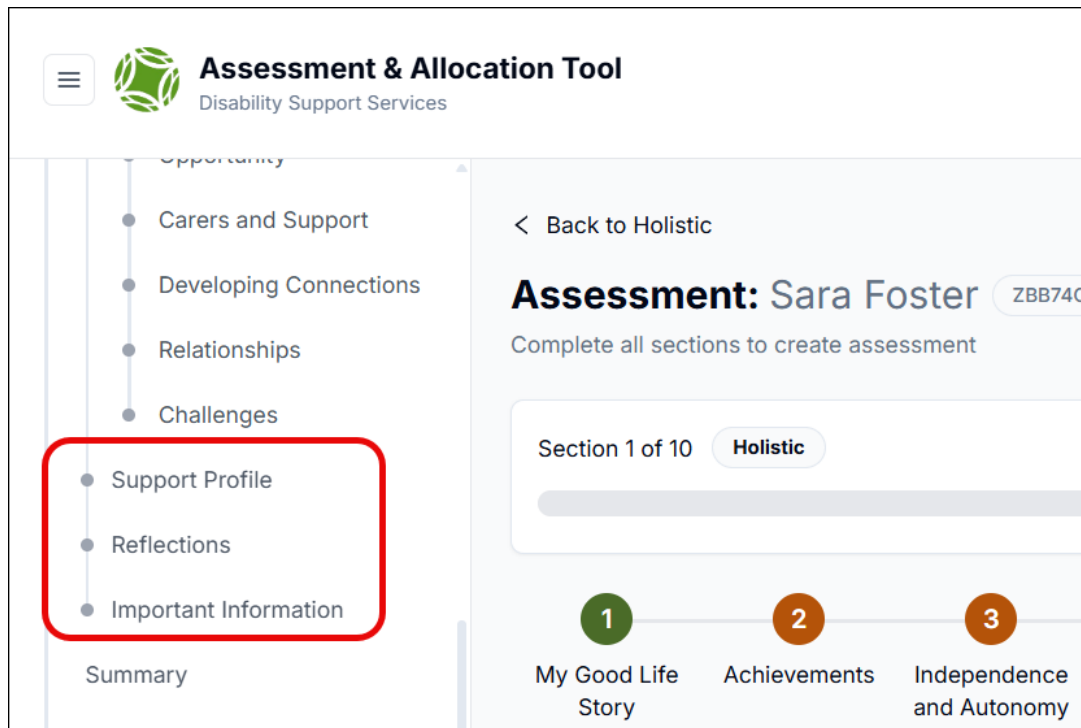
At any stage, you can click **Save as Draft** to save the Assessment and come back to it later:



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.

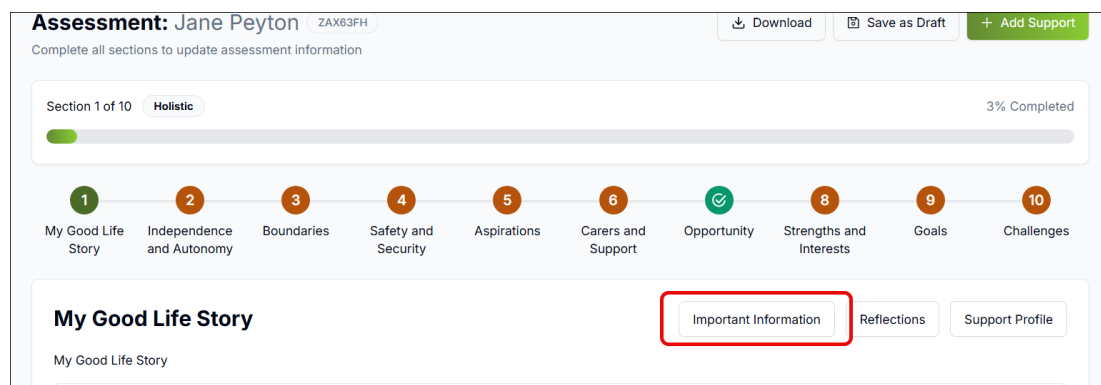
While you can add these from pages of the *Holistic* section, you can also answer and view all of your responses for each section collated together by clicking the respective option in the lefthand panel:



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:

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.

3.3.1.1 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:

Section 2 of 10 **Holistic** 20% Completed

1 2 3 4 5 6 7 8 9 10

My Good Life Story Independence and Autonomy Boundaries Safety and Security Aspirations Carers and Support Opportunity Strengths and Interests Goals Challenges

Independence and Autonomy

Which decisions am I making, and what could be involved in my playing more of a role in decision making?

Enter detailed summary...

Important Information Reflections

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

Important Information Reflections

- **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**:

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:

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 *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 support 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:

Volume *	Unit Type *	Frequency *
2	Hour(s) ▾	Weekly ▾

- 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:

Supports			
			+ Add Support
Area	Support	Total Cost	Actions
Daily routines	someone to take me to my afterschool activities	\$7,821.43	Edit View Delete
< Back Abandon Continue			

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.

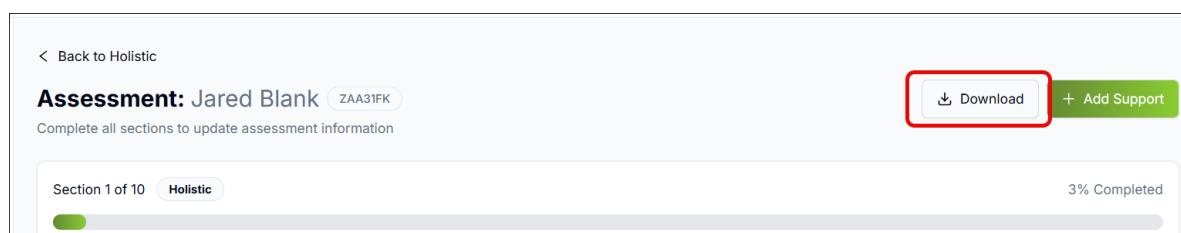
3.4 Summary

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*.

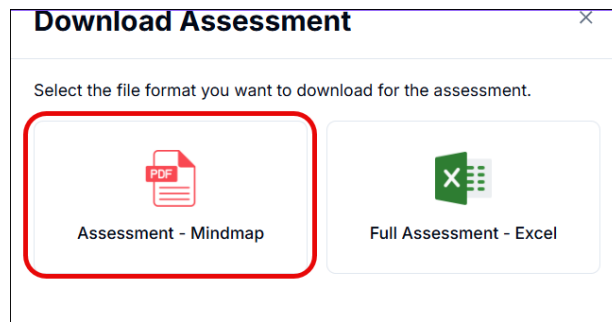
After these pages you will arrive on the *Summary* page, where you can view the information you recorded in the *Important Information*, *Reflections*, *Support Profile* sections and any *Supports* added.

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*:



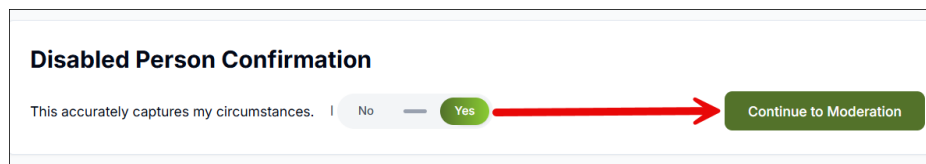
There are two download options: Download as a PDF Mind-map, or Download as an Excel file. To proceed, click the appropriate option:



The 'Download Assessment' dialog box contains the instruction 'Select the file format you want to download for the assessment.' It features two buttons: 'Assessment - Mindmap' (with a PDF icon) and 'Full Assessment - Excel' (with an Excel icon). The 'Assessment - Mindmap' button is highlighted with a red rectangular border.

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**:

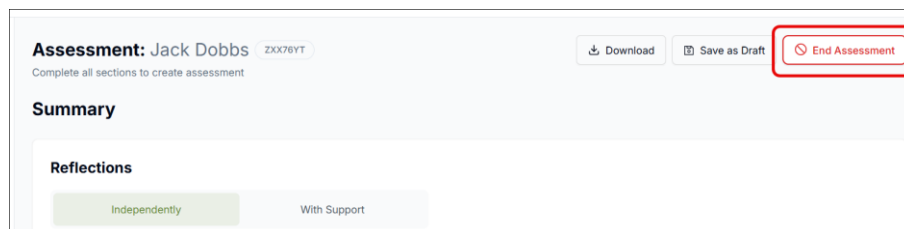


The 'Disabled Person Confirmation' form includes the text 'This accurately captures my circumstances.' followed by radio buttons for 'No' and 'Yes'. The 'Yes' button is selected and highlighted with a red circle. A red arrow points from the 'Yes' button to the 'Continue to Moderation' button.

3.4.1 Ending an Assessment

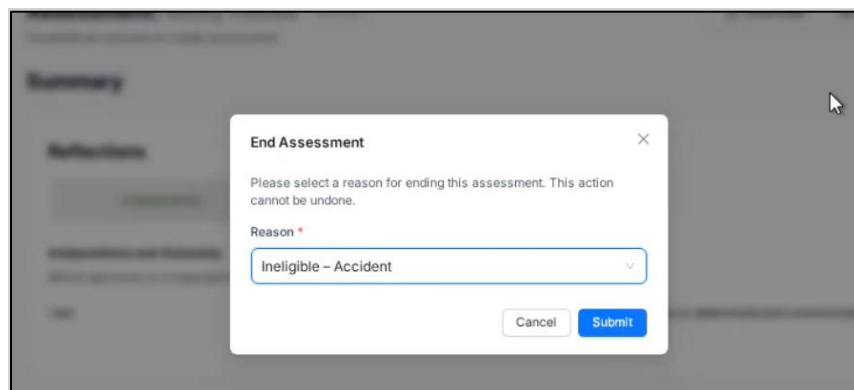
If you want to end the assessment you are working on without completing the workflow:

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



The 'Summary' screen for 'Assessment: Jack Dobbs' shows a 'Reflections' section with 'Independently' selected. In the top right corner, the 'End Assessment' button is highlighted with a red rectangular border.

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

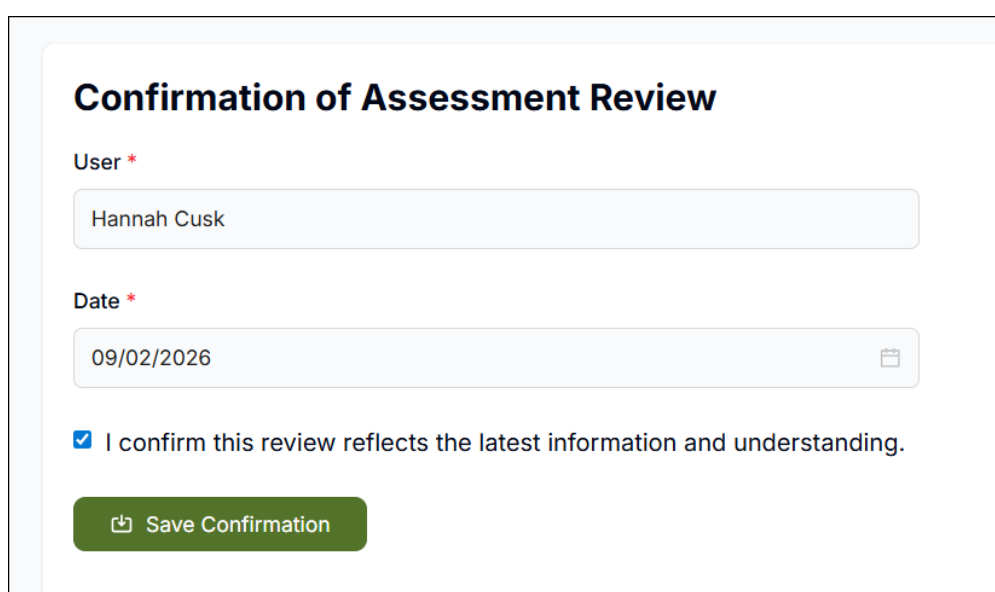


The 'End Assessment' pop-up dialog asks the user to 'Please select a reason for ending this assessment. This action cannot be undone.' It features a dropdown menu for 'Reason' with 'Ineligible - Accident' selected. At the bottom are 'Cancel' and 'Submit' buttons.

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**:

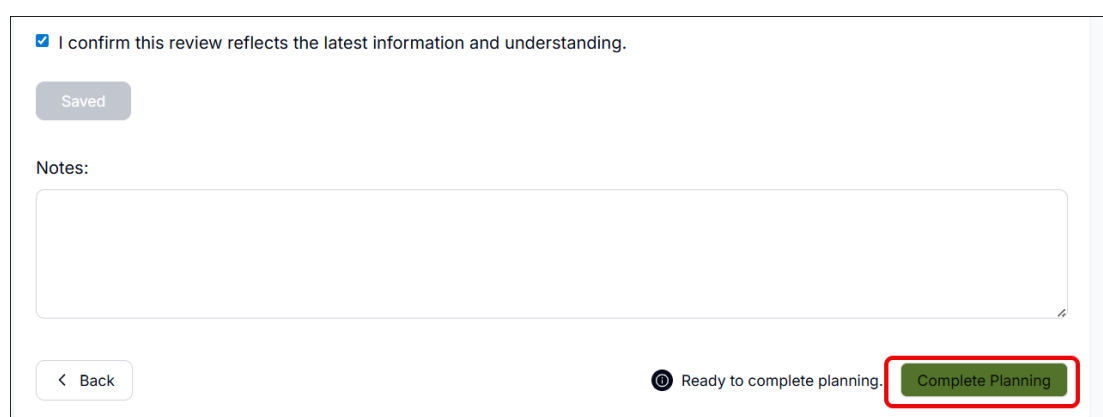


The screenshot shows a form titled "Confirmation of Assessment Review". It contains two required fields: "User *" with the value "Hannah Cusk" and "Date *" with the value "09/02/2026". Below these fields is a checkbox labeled "I confirm this review reflects the latest information and understanding." which is checked. At the bottom is a green button labeled "Save Confirmation".

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

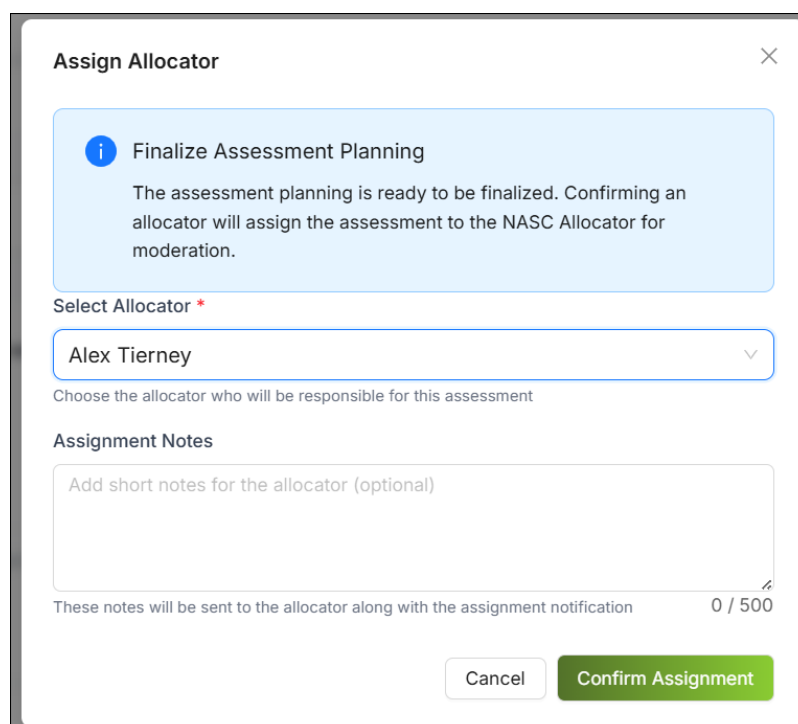
After saving confirmation, to complete the assessment:

1. Click **Complete Planning**:



The screenshot shows the assessment completion screen. It includes a checkbox labeled "I confirm this review reflects the latest information and understanding." which is checked. Below this is a "Saved" button. There is a "Notes:" label followed by a large text area. At the bottom, there is a "< Back" button, a status indicator "Ready to complete planning.", and a green button labeled "Complete Planning" which is highlighted with a red rectangle.

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:



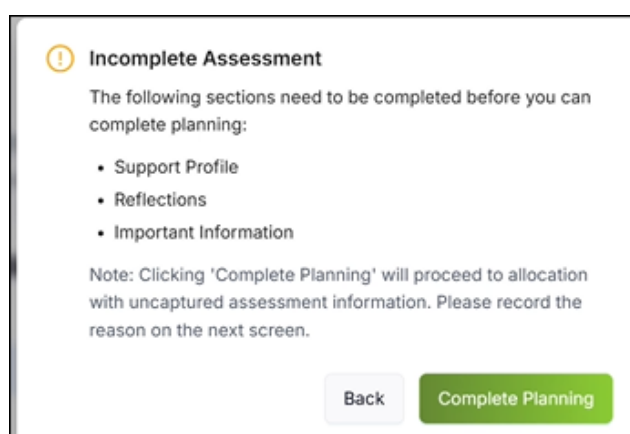
The 'Assign Allocator' pop-up form contains the following elements:

- Header:** 'Assign Allocator' with a close button (X) in the top right corner.
- Information Box:** A light blue box with an information icon (i) containing the text: 'Finalize Assessment Planning. The assessment planning is ready to be finalized. Confirming an allocator will assign the assessment to the NASC Allocator for moderation.'
- Select Allocator:** A dropdown menu labeled 'Select Allocator *' with 'Alex Tierney' selected. Below it is the instruction: 'Choose the allocator who will be responsible for this assessment'.
- Assignment Notes:** A text area labeled 'Assignment Notes' with the placeholder text 'Add short notes for the allocator (optional)'. Below the text area is the instruction: 'These notes will be sent to the allocator along with the assignment notification' and a character count '0 / 500'.
- Buttons:** 'Cancel' and 'Confirm Assignment' buttons at the bottom right.

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:



The 'Incomplete Assessment' pop-up form contains the following elements:

- Header:** 'Incomplete Assessment' with a warning icon (⚠) in the top left corner.
- Text:** 'The following sections need to be completed before you can complete planning:'
- List:** A bulleted list of sections: 'Support Profile', 'Reflections', and 'Important Information'.
- Note:** 'Note: Clicking 'Complete Planning' will proceed to allocation with uncaptured assessment information. Please record the reason on the next screen.'
- Buttons:** 'Back' and 'Complete Planning' buttons at the bottom right.

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*:

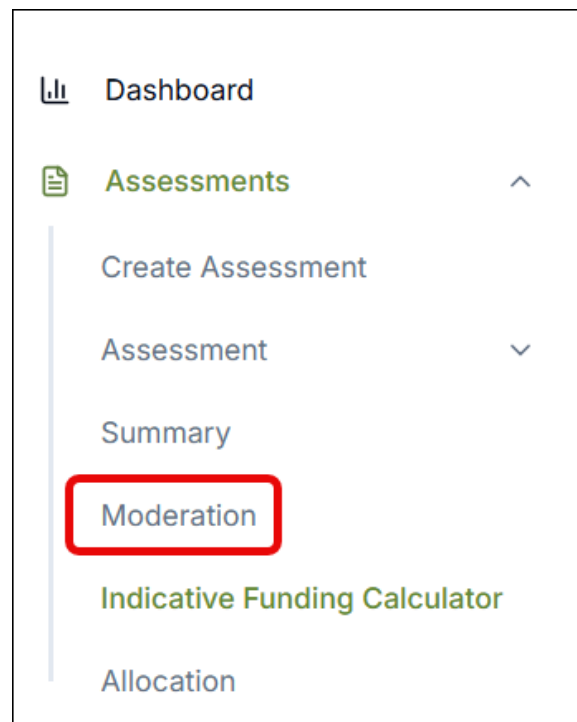
Action Required						Show 10 Assessments
NHI	Name	Assignee	Assessment Date	Next Step	Actions	
ZBB74OP	Sara Foster	Alex Tierney	17/05/2026	Start Moderation	 	

To pick up that assessment:

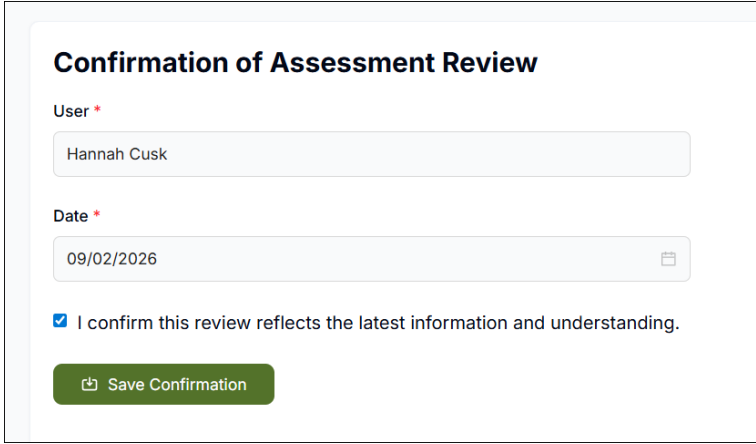
1. Click on the **Start Moderation** status
2. A pop up will appear asking you to confirm; click **Start Moderation**
3. The assessment will open on the *Moderation* screen from where you can easily navigate through the assessment to review the recorded information

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):

A screenshot of a web form titled "Confirmation of Assessment Review". It contains two input fields: "User" with the text "Hannah Cusk" and "Date" with the text "09/02/2026". Below these is a checkbox labeled "I confirm this review reflects the latest information and understanding." which is checked. At the bottom is a green button labeled "Save Confirmation".

Confirmation of Assessment Review

User *

Hannah Cusk

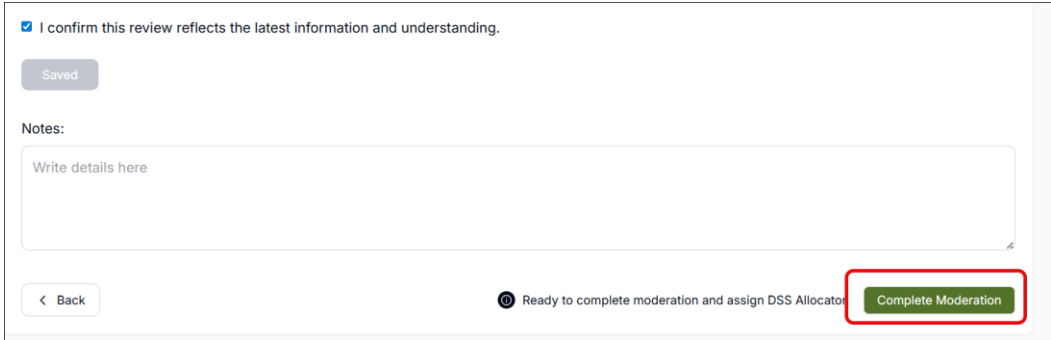
Date *

09/02/2026

☒ I confirm this review reflects the latest information and understanding.

[Save Confirmation](#)

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**:

A screenshot of a web form titled "Complete Moderation". It contains a checkbox labeled "I confirm this review reflects the latest information and understanding." which is checked. Below this is a "Saved" button. There is a "Notes:" section with a text area labeled "Write details here". At the bottom left is a "< Back" button. At the bottom right is a green button labeled "Complete Moderation" which is highlighted with a red box. Above this button is a status indicator: "Ready to complete moderation and assign DSS Allocator".

☒ I confirm this review reflects the latest information and understanding.

Saved

Notes:

Write details here

< Back

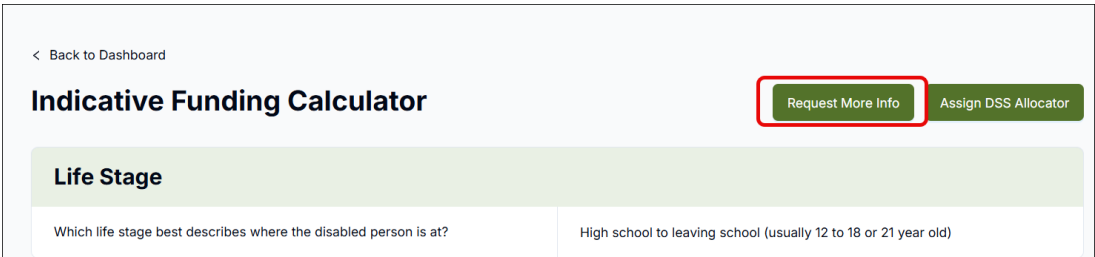
Ready to complete moderation and assign DSS Allocator

[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**:

A screenshot of a web form titled "Indicative Funding Calculator". It has a "< Back to Dashboard" link at the top left. At the top right are two green buttons: "Request More Info" (highlighted with a red box) and "Assign DSS Allocator". Below these is a section titled "Life Stage" with a light green background. Under this section is a question: "Which life stage best describes where the disabled person is at?" followed by the answer: "High school to leaving school (usually 12 to 18 or 21 year old)".

< Back to Dashboard

Indicative Funding Calculator

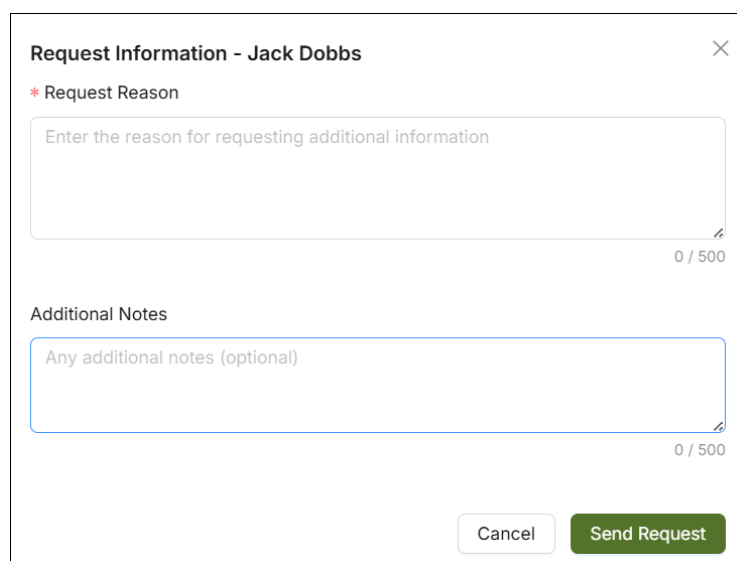
[Request More Info](#) [Assign DSS Allocator](#)

Life Stage

Which life stage best describes where the disabled person is at?

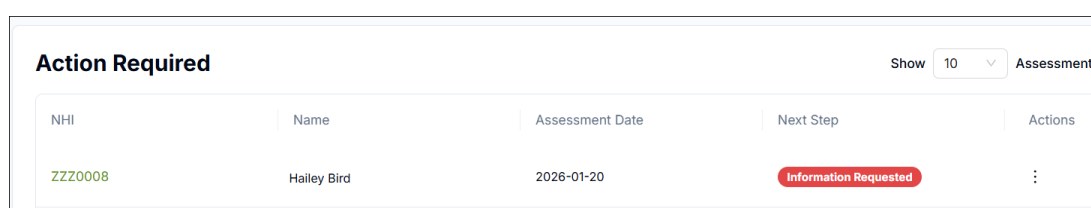
High school to leaving school (usually 12 to 18 or 21 year old)

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



A modal form titled "Request Information - Jack Dobbs" with a close button (X) in the top right corner. It contains two text input fields. The first field is labeled "* Request Reason" and has a placeholder "Enter the reason for requesting additional information" with a character count "0 / 500". The second field is labeled "Additional Notes" and has a placeholder "Any additional notes (optional)" with a character count "0 / 500". At the bottom right, there are two buttons: "Cancel" and "Send Request".

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



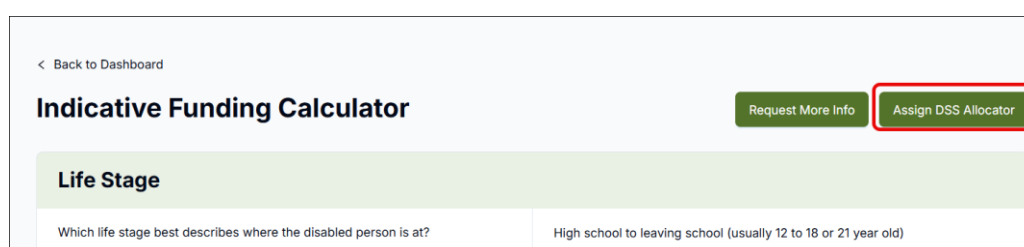
A table titled "Action Required" with a "Show 10 Assessments" dropdown in the top right. The table has five columns: "NHI", "Name", "Assessment Date", "Next Step", and "Actions". One row is visible with the following data: NHI: ZZZ0008, Name: Hailey Bird, Assessment Date: 2026-01-20, Next Step: Information Requested (in a red pill), and Actions: a vertical ellipsis.

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**:



A form titled "Indicative Funding Calculator" with a "< Back to Dashboard" link in the top left. In the top right, there are two buttons: "Request More Info" and "Assign DSS Allocator" (which is highlighted with a red border). Below the buttons is a section titled "Life Stage" with a question: "Which life stage best describes where the disabled person is at?". The answer provided is "High school to leaving school (usually 12 to 18 or 21 year old)".

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**:

Assign Allocator

Assign DSS Allocator for Indicative Range

Moderation is complete. Assign a DSS Allocator who will calculate the Indicative Range for this assessment.

Select Allocator *

Select an allocator

Choose the allocator who will be responsible for this assessment

Assignment Notes

Add any notes for the allocator (optional)

These notes will be sent to the allocator along with the assignment notification0 / 500

Cancel

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:

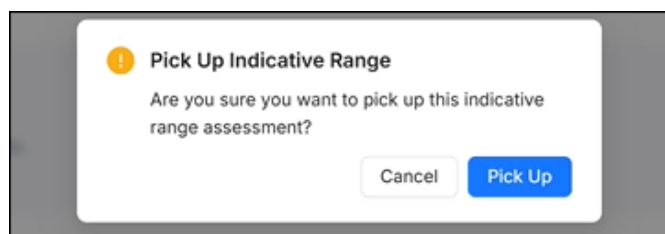
1. Find the assessment on your *Dashboard*
2. Click on the **Ready for Indicative Range** status next to the assessment:

Action Required

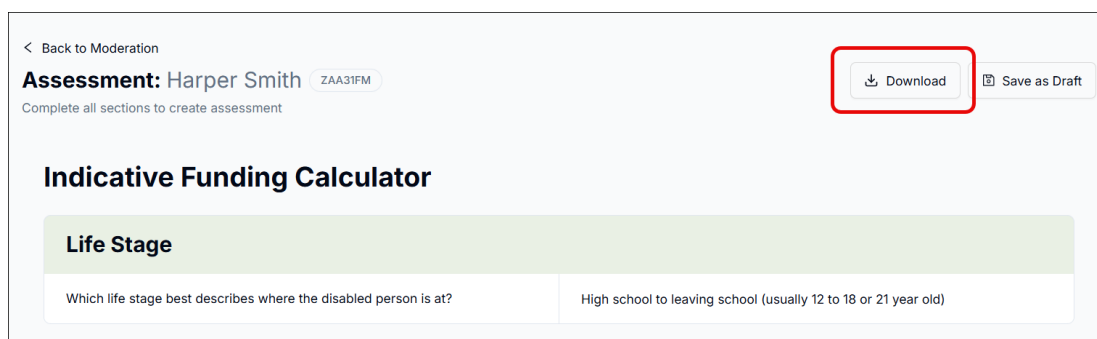
Show10Assessments

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)

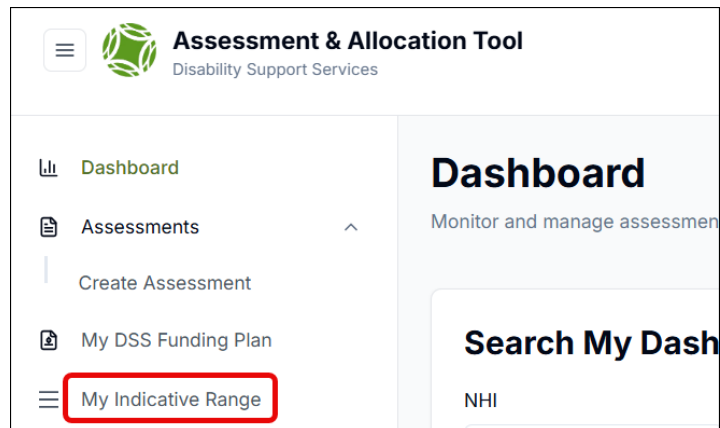
Download Save as Draft

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*):

The screenshot shows the 'Search Indicative Range' form. It includes input fields for 'NHI', 'Case No', 'First Name', and 'Last Name', each with a placeholder text 'Enter [field name]'. There is also a 'Status' dropdown menu with a 'Select Status' label and a downward arrow.

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):

The screenshot shows the 'Indicative Range List' table. The table has three columns: 'Assessment ID', 'Organization', and 'Name'. The first row has a checkbox that is highlighted with a red box. The table contains six rows of data, each with a checkbox, an assessment ID, an organization, and a name with an ID.

☒	Assessment ID	Organization	Name
☒	VZPK9	DSS Org	Jack Dobbs ID: ZXX76YT
☒	TTV20	NASC Org	Jack Pargiter ID: ZBS25FK
☒	P3F20	NASC Org	Jane Peyton ID: ZAX63FH
☒	QAU20	NASC Org	Dean Dean ID: ABC4040
☒	CIU10	DSS Org	Jack Wilson ID: ZZZ65FM
☒	WE910	DSS Org	Jane Posner ID: ZZZ67FL

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

Indicative Range
Manage participant assessments and allocation ranges

2 selected x **Bulk Export** **Bulk Import**

Search Indicative Range

NHI: Enter NHI Case No: Enter Case No First Name: Last Name: Status: Select Status

Indicative Range List Show 20 Assessments

Assessment ID	Organization	Name	Requestor	Status	Action
☒ VZPK9	DSS Org	Jack Dobbs ID: ZXX76YT	Alex Tierney	Ready for IR	
☒ TTV20	NASC Org	Jack Pargiter ID: ZBS25FK	Alex Tierney	Ready for IR	

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

Assessment ID	Organization	Name	Requestor	Status	Action
☐ VZPK9	DSS Org	Jack Dobbs ID: ZXX76YT	Alex Tierney	Indicative Range in Progress	
☐ TTV20	NASC Org	Jack Pargiter ID: ZBS25FK	Alex Tierney	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:

Assessment ID	Organization	Name	Requestor	Status	Action
☐ VZPK9	DSS Org	Jack Dobbs ID: ZXX76YT	Alex Tierney	Indicative Range in Progress	

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

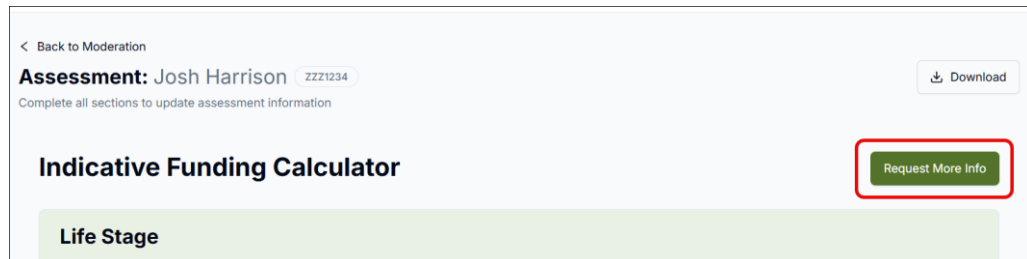
Indicative Range List Show 20 Assessments

Assessment ID	Organization	Name	Requestor	Status	Action
☐ VZPK9	DSS Org	Jack Dobbs ID: ZXX76YT	Alex Tierney	Indicative Range in Progress	

5.3 Requesting More Information

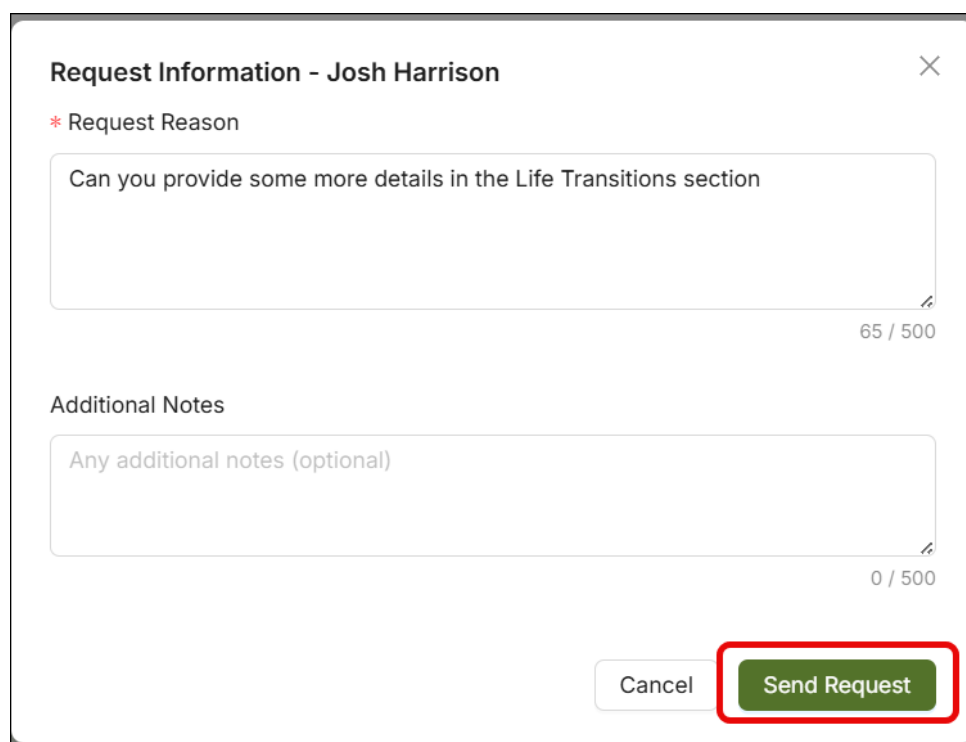
As a DSS Allocator, if you require more information from the Assessor who filled out the assessment:

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



The screenshot shows the 'Indicative Funding Calculator' interface. At the top, there is a navigation bar with a '< Back to Moderation' link, the assessment name 'Assessment: Josh Harrison' with a 'ZZZ1234' ID, and a 'Download' button. Below this, the title 'Indicative Funding Calculator' is displayed. A green button labeled 'Request More Info' is highlighted with a red rectangular box. Below the title, there is a section titled 'Life Stage'.

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**:



The screenshot shows a modal window titled 'Request Information - Josh Harrison'. It contains two text input fields. The first field is labeled '* Request Reason' and contains the text 'Can you provide some more details in the Life Transitions section'. The second field is labeled 'Additional Notes' and contains the text 'Any additional notes (optional)'. At the bottom right, there are two buttons: 'Cancel' and 'Send Request'. The 'Send Request' button is highlighted with a red rectangular box.

6 Managing the Indicative Funding Range in OBIR

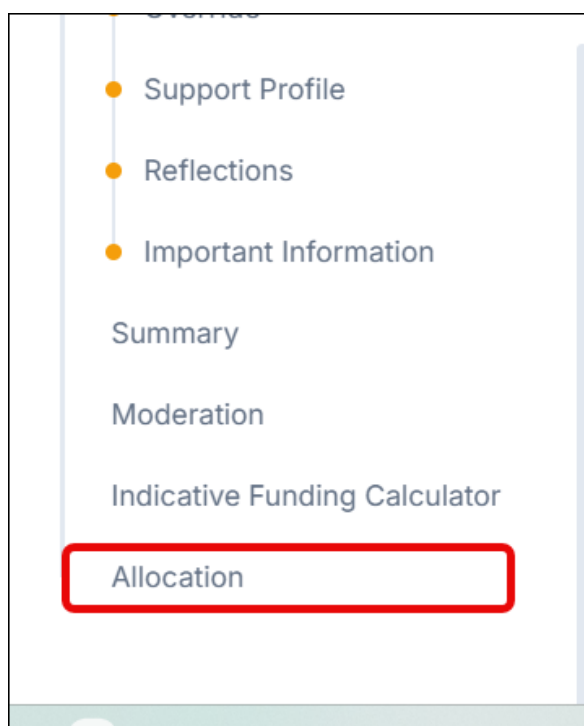
Typically, the Indicative Funding Range will be calculated in Excel and recorded in OBIR by a DSS Allocator. A NASC/EGL Allocator will then review the range and apply any adjustments that may be necessary.

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

- 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) 10000

Upper Range * (DSS Only) 20000

Confidence (DSS Only) High

Override < 0 0%

Dual Funding < 0 0%

Adjusted Ranges

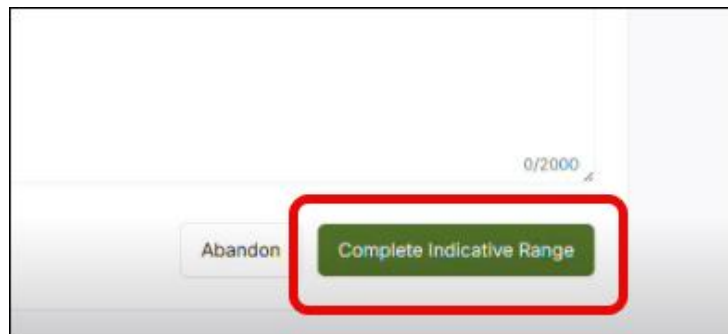
Adjusted Lower Range \$10000.00

Adjusted Upper Range \$20000.00

Rationale

Enter notes here...

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

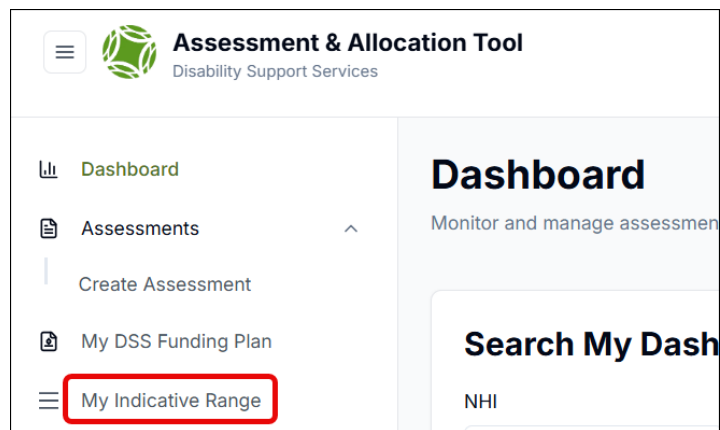


6.2 DSS Allocator Imports Funding Range File

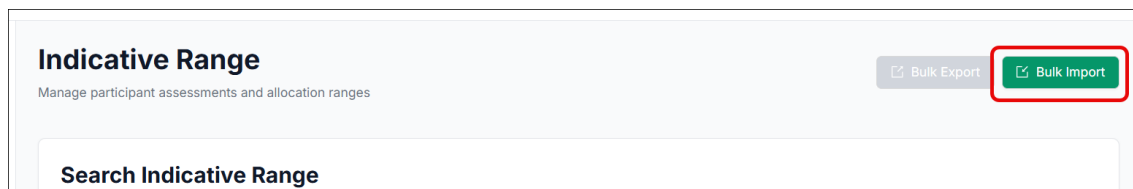
To import an indicative range file:

- Firstly, the file intended for importation must include the following for each relevant assessment:
 - Unique Identifier(Assessment ID)
 - NHI
 - First Name
 - Last Name
 - Lower Range
 - Upper Range
 - Rationale

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

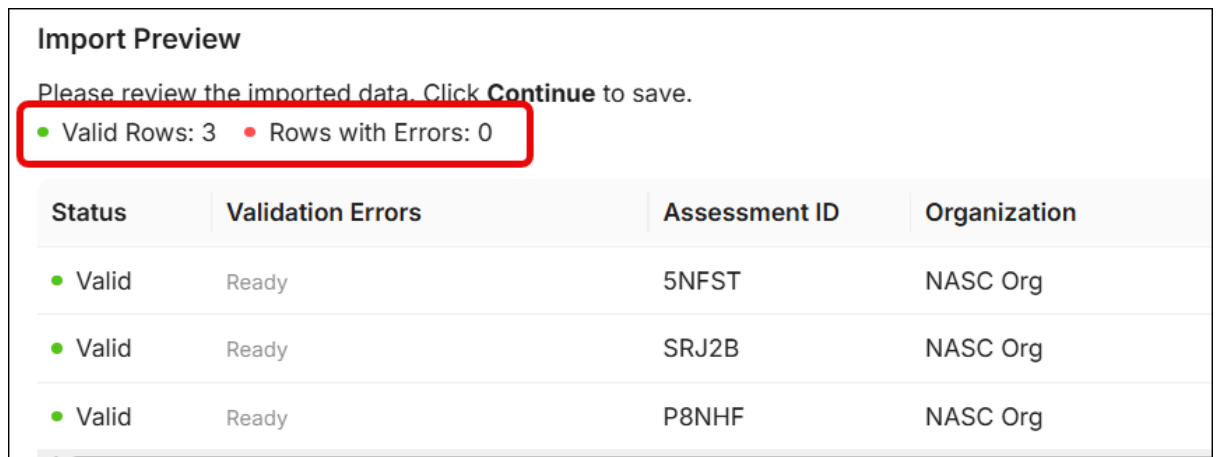


3. On the *Indicative Range* screen, click **Bulk Import**:



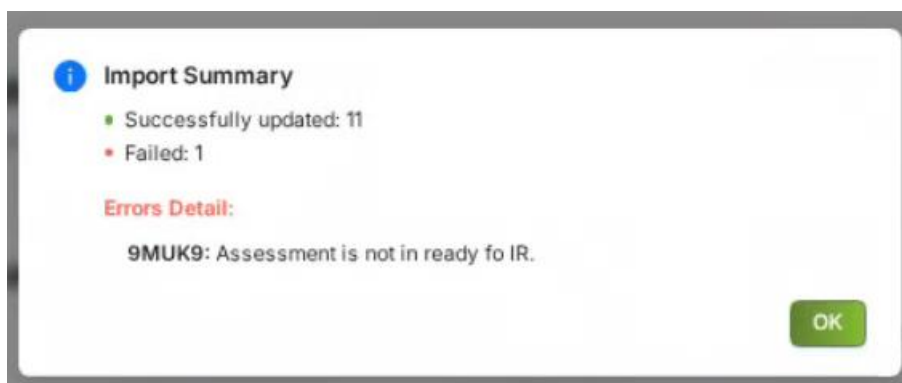
4. Search for and select your file on your local machine

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

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



- 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.
- 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:

Indicative Range List						Show	20	Assessment
☐	Assessment ID	Organization	Name	Requestor	Status			Action
☐	VZPK9	DSS Org	Jack Dobbs ID: ZXK76YT	Alex Tierney	Indicative Range in Progress			

6.3 NASC/EGL Allocator Reviews the Funding Range

As a NASC/EGL Allocator:

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

Action Required						Show	10	Assessments
NHI	Name	Assessment Date	Next Step		Actions			
ZZZ0089	James Jamieson	24/02/2026	Continue Indicative Range					

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

- 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:

The screenshot shows the 'Indicative Range' configuration page for 'Hassan Ali' (ID: ZZZ0099). The page is titled 'Configure allocation parameters and confidence levels'. It features several input fields and sliders:

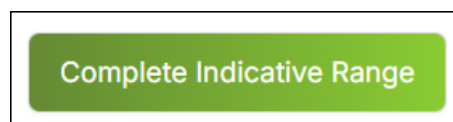
- Lower Range * (DSS Only):** A text input field containing '10000'.
- Upper Range * (DSS Only):** A text input field containing '20000'.
- Confidence (DSS Only):** A dropdown menu set to 'High'.
- Override:** A horizontal slider with a green handle positioned at 25%.
- Dual Funding:** A horizontal slider with a purple handle positioned at 25%.

Below these controls, the 'Adjusted Ranges' section displays:

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

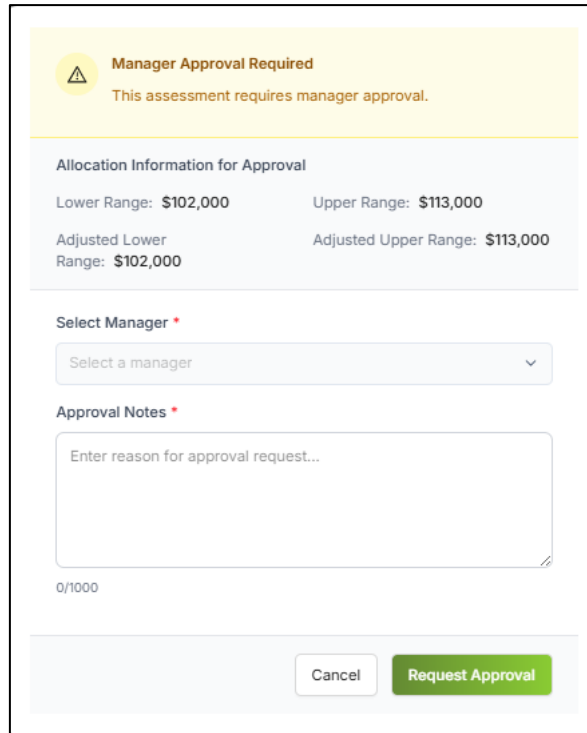
The 'Rationale' section contains a text area for notes, currently empty, with a character count of 0/2000. At the bottom, there are three buttons: '< Back to Dashboard', 'Abandon', and 'Complete Indicative Range'.

- The adjusted ranges will be displayed below
- Type your rationale for changes to the funding range in the *Rationale* field.
- Once you are happy, click **Complete Indicative Range**:



- 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**:



The dialog box is titled "Manager Approval Required" with a warning icon. It contains a message: "This assessment requires manager approval." Below this is a section "Allocation Information for Approval" with the following data:

Allocation Information for Approval	
Lower Range: \$102,000	Upper Range: \$113,000
Adjusted Lower Range: \$102,000	Adjusted Upper Range: \$113,000

Below the table is a "Select Manager" dropdown menu with the text "Select a manager". Underneath is a text area for "Approval Notes" with the placeholder "Enter reason for approval request..." and a character count "0/1000". At the bottom are two buttons: "Cancel" and "Request Approval".

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

ZZZ5654	Ethan Marshall	26/02/2026	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*:

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
 - 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

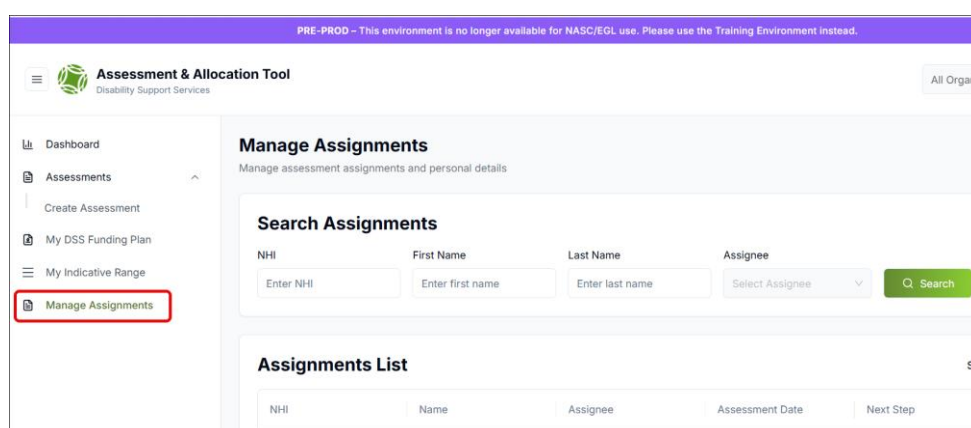
8 Managing Assignments

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.

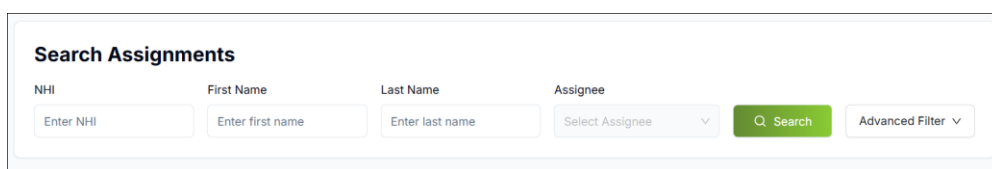
Managers can also update Personal Details within an assessment in case there is an information error, e.g. a mismatch between name and NHI.

To manage assignments:

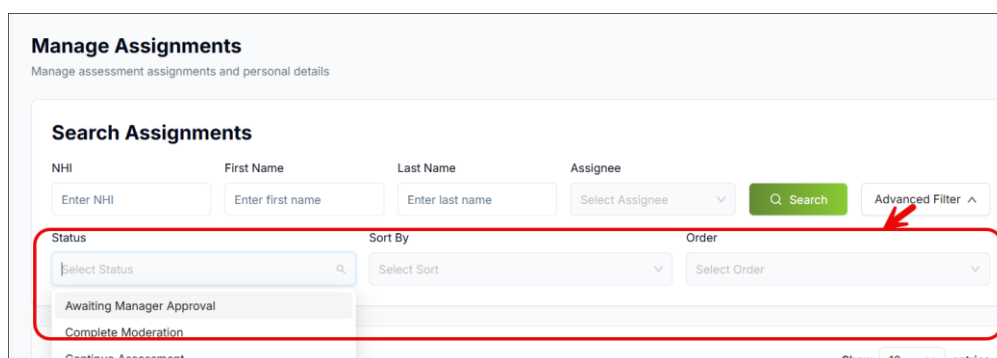
1. Click **Manage Assignments** in the left-hand menu:



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:

Assessment Date	Next Step	Actions
17/05/2026	Start Moderation	 

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**:

↶ Reassign Assessment

×

Name: Sara Foster [Start Moderation](#)

Current Assignee: Alex Tierney

* Select New Assignee

Joseph Dante

* Reassignment Reason

Alex on leave

13 / 500

Cancel

Reassign

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

Show 10 entries		
Assessment Date	Next Step	Actions
12/05/2026	Continue Indicative Range	 

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**:

 Edit Personal Details ×

Name: Hailey Bird [Continue Assessment](#)

* NHI

ZZZ32FM

* First Name

Hailey

* Last Name

Bird

Date of Birth

07/01/2026 

Gender

Select Gender 

* Correction Reason

Explain why these corrections are being made...

0 / 500 

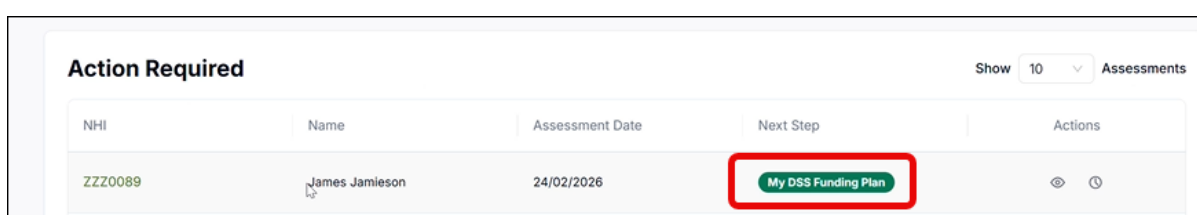
9 My DSS Funding Plan

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*.

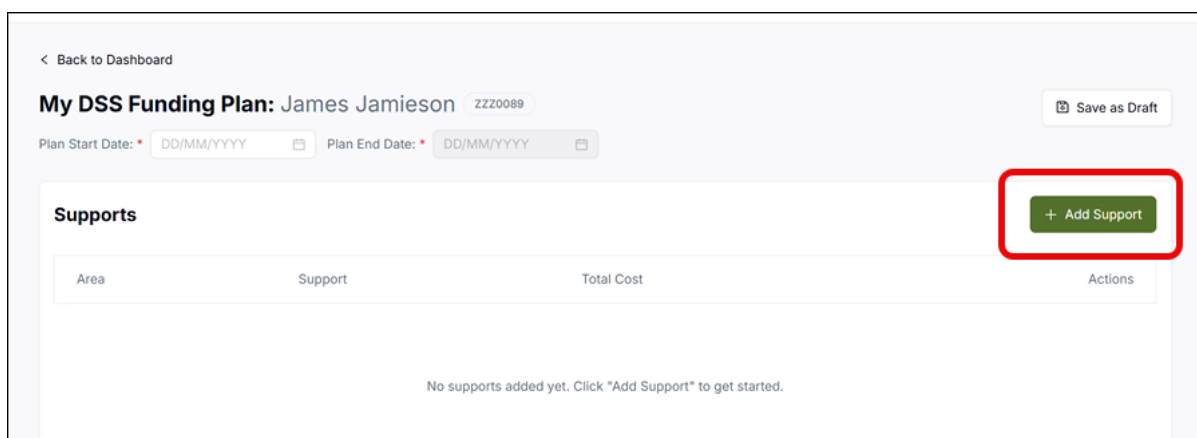
Click on the **My DSS Funding Plan** status next to the assessment:



The screenshot shows a table titled 'Action Required' with columns: NHI, Name, Assessment Date, Next Step, and Actions. A row for 'ZZZ0089' and 'James Jamieson' is shown with an assessment date of '24/02/2026'. In the 'Next Step' column, a green button labeled 'My DSS Funding Plan' is highlighted with a red rectangle. The 'Actions' column contains icons for viewing and editing.

NHI	Name	Assessment Date	Next Step	Actions
ZZZ0089	James Jamieson	24/02/2026	My DSS Funding Plan	

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:



The screenshot shows the 'My DSS Funding Plan' page for 'James Jamieson' (ZZZ0089). It includes a 'Back to Dashboard' link, a 'Save as Draft' button, and date pickers for 'Plan Start Date' and 'Plan End Date'. Below these is a section titled 'Supports' with a table that has columns: Area, Support, Total Cost, and Actions. A green button labeled '+ Add Support' is highlighted with a red rectangle. At the bottom, a message states: 'No supports added yet. Click "Add Support" to get started.'

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

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:

Volume *	Unit Type *	Frequency *
2	Hour(s) ▾	Weekly ▾

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:

Indicative Range Check

Current Estimate

Indicative Range

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

Indicative Range

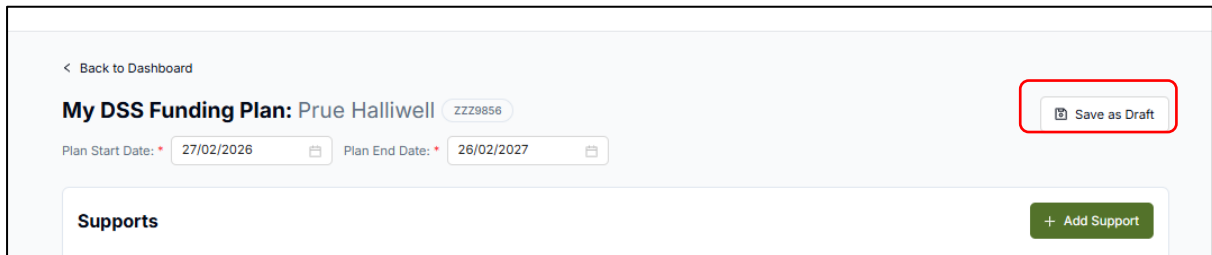
✓ Plan cost of \$26,000.00 is within range (\$20,000.00 - \$27,000.00)

✓ Check Funding Within Range

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.



< Back to Dashboard

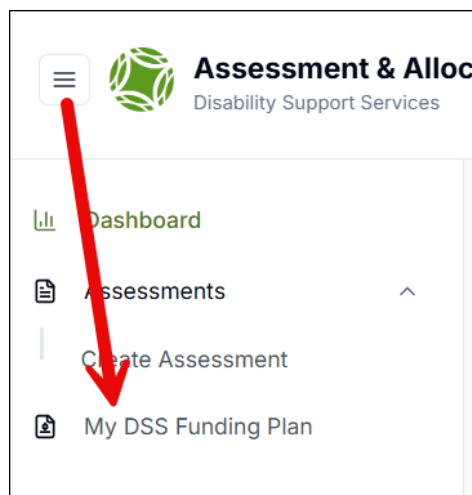
My DSS Funding Plan: Prue Halliwell ZZ29856

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

Supports + Add Support

Save as Draft

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

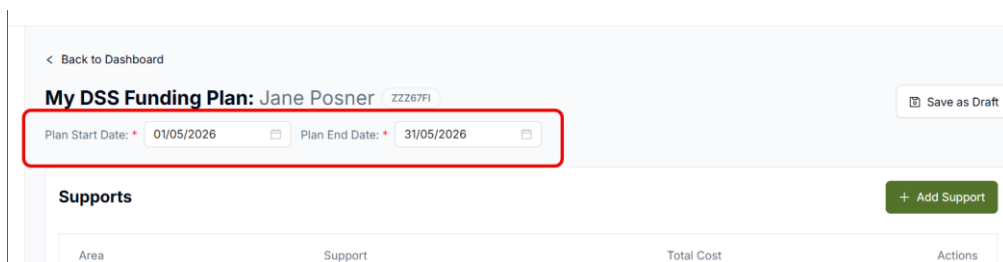


You can download the plan from this screen to give to the Disabled Person for review.

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:



< Back to Dashboard

My DSS Funding Plan: Jane Posner ZZ267FI

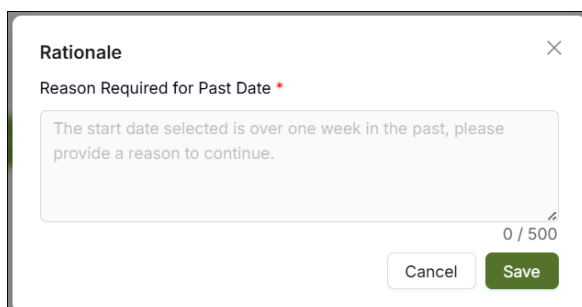
Plan Start Date: * 01/05/2026 Plan End Date: * 31/05/2026

Supports + Add Support

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

Save as Draft

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



A modal dialog box titled "Rationale" with a close button (X) in the top right corner. The main heading is "Reason Required for Past Date *". Below it is a text input field containing the message: "The start date selected is over one week in the past, please provide a reason to continue." The character count "0 / 500" is shown at the bottom right of the input field. At the bottom of the dialog are two buttons: "Cancel" and "Save".

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

5. Click **Save**

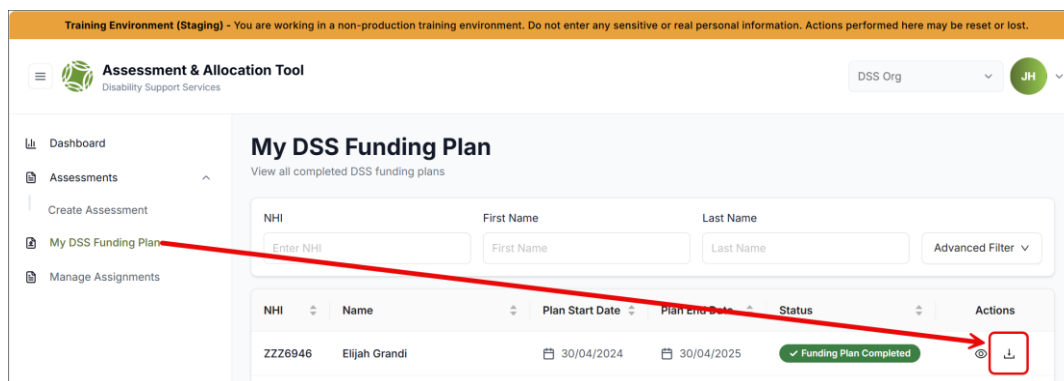
9.5 Downloading a MyDSS Funding Plan

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.

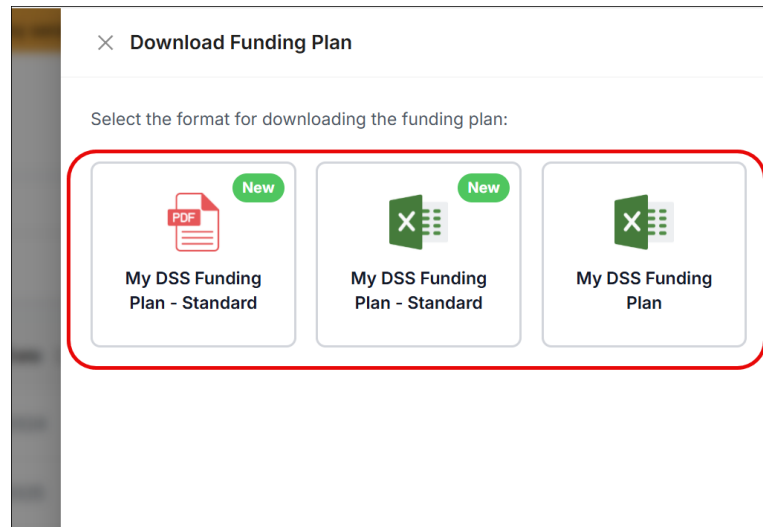
To select the appropriate template for downloading:

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



The screenshot shows the "Assessment & Allocation Tool" interface. The left sidebar has a menu with "My DSS Funding Plan" selected. The main content area is titled "My DSS Funding Plan" and shows a table of completed funding plans. A red arrow points from the "My DSS Funding Plan" menu item to the "Download icon" (a circular icon with a downward arrow) in the "Actions" column of the table. The table has columns for NHI, Name, Plan Start Date, Plan End Date, Status, and Actions. The first row shows NHI "ZZZ6946", Name "Elijah Grandi", Plan Start Date "30/04/2024", Plan End Date "30/04/2025", Status "Funding Plan Completed", and the "Download icon" in the Actions column.

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

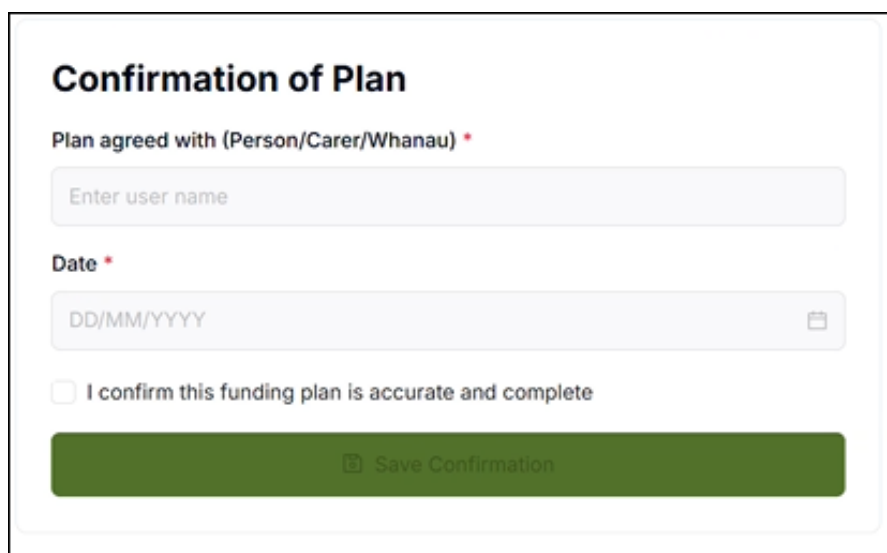
Support Line 1: AB5DE-02-01

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**:

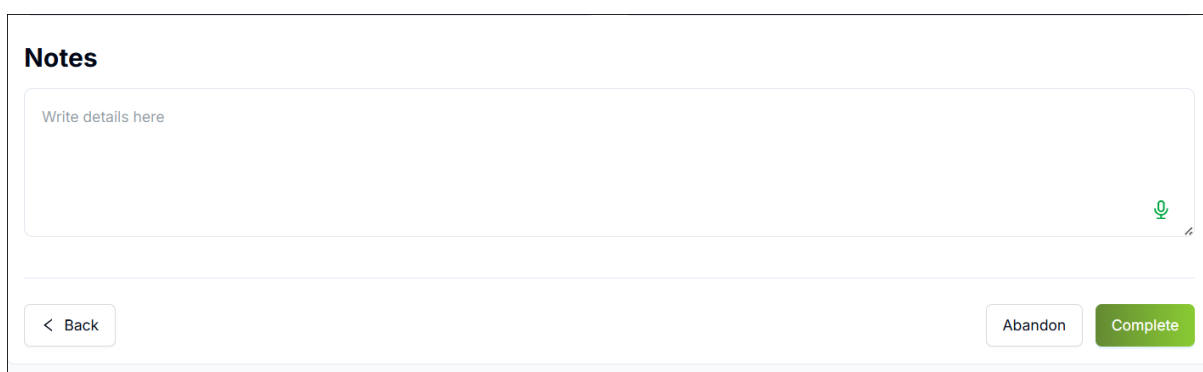


The image shows a web form titled "Confirmation of Plan". It contains the following elements: a label "Plan agreed with (Person/Carer/Whanau) *" above a text input field with placeholder text "Enter user name"; a label "Date *" above a date input field with placeholder text "DD/MM/YYYY" and a calendar icon; a checkbox labeled "I confirm this funding plan is accurate and complete"; and a large green button at the bottom labeled "Save Confirmation" with a document icon.

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**:



The image shows a section titled "Notes" with a large text area containing the placeholder "Write details here". To the right of the text area is a green microphone icon. At the bottom of the section are three buttons: "< Back", "Abandon", and a green "Complete" button.