

Visual description: A green Disability Support Services logo sits to the left of the New Zealand Government crest in black.

MSD Disability Support Services

Operational Guidance to support Preparation for Assessment

Effective from 16 February 2026

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Purpose

1. Under the DSS Operational Policy: Assessment and Allocation of Disability Support Funding, Needs Assessment and Service Coordination (NASCs) and Enabling Good Lives (EGL) sites are obligated to prepare a disabled person, and their family, whānau, guardian and/or carer for their assessment.
2. This document provides supplementary guidance to support NASC and EGL sites to meet the Preparation for Assessment obligations.
3. NASCs and EGL sites are required to apply this from 16 February 2026 for people entering the system and those already receiving funding but requiring reassessment (urgent or otherwise).

Preparation for assessment

4. The purpose of the preparation for assessment process is to confirm whether the person is likely to be eligible for an assessment and, if so, to provide the disabled person and their family, whānau, guardian, and/or carer with an assessment information pack explaining the assessment details, what to expect, and how to prepare.
5. The Operational Guidance requires an assessment information pack to contain the following information:
 - a. A templated letter - containing the agreed details for their upcoming assessment; and
 - b. A nationally consistent information sheet – providing information about the assessment process; and
 - c. Any supplementary information considered necessary for the disabled person, family, whānau, guardian and/or carer to get ready for the assessment.

Confirming eligibility for assessment

6. When a referral is received, the first step is to confirm whether the person is likely to be eligible for an assessment.
7. To do so, the NASC or EGL site verifies that the person is likely to meet the following requirements of the DSS Eligibility Operational Policy:
 - a. They are eligible to access publicly funded services in New Zealand as defined in the Health and Disability Services Eligibility Direction 2011.
 - b. They have been identified as having a physical disability, intellectual disability, sensory disability, autism, or a combination of these.

8. To satisfy 7b, the NASC or EGL site would need to have evidence to support identification of an impairment type specified in the DSS **Eligibility Operational Policy**, for example, a clinical diagnosis.
9. Deciding that someone is eligible for an assessment does not require full determination of eligibility. The determination of eligibility can only occur once there is confirmation of an ongoing need for support, which is gathered through the assessment process.

Scheduling the assessment

10. Once the NASC or EGL site is satisfied that the person is eligible for assessment, then the scheduling of the assessment can be arranged with the disabled person, family, whānau, guardian and/or carer. Scheduling information is recorded as part of the assessment information pack. NASC and EGL sites will need to work through the following with the disabled person family, whānau, guardian and/or carer to complete the information pack:
 - a. Discuss and identify any supports required for the assessment. This may include considerations such as the timing and location of the assessment, accessibility requirements, and communication supports (for example, organising a location with suitable accessibility requirements or requiring a NZSL interpreter to support).
 - b. Agree the date, time, and location of the assessment.

Completing the assessment information pack

11. An information pack must be provided to the disabled person, family, whānau, guardian and/or carer confirmed as eligible for an assessment.
12. Once the assessment details have been finalised and agreed with the disabled person, family, whānau, guardian and/or carer, the information pack can be completed and sent.
13. The information pack should be sent to the disabled person and, where appropriate, their family, whānau, guardian and/or carer, using their preferred delivery method (e.g., email or post).
14. Where a disabled person is under shared guardianship (e.g., care provided across two households), the information pack must be issued to the individual named in the referral. If multiple parents or guardians are identified in the referral, an information pack must be provided to each.
15. All letter templates and information sheets are available to download on the [‘Training and Support – Assessment, Allocation and Flexible Funding’](#) webpage.

Preparing the letter

16. There are two standard letter templates. Ensure to select the template that aligns with the disabled person's circumstances:
 - a. Letter for disabled person 18 years or older.
 - b. Letter for parent, family, whānau, guardians and/or carers (for disabled person under 18 years or requiring support).
17. To complete the letter:
 - d. use your NASC or EGL site's official letterhead; and
 - a. complete only the required fields shown in red text; and
 - b. convert all text to black once completed.
18. To maintain standardisation, other elements of the templates should not be amended, unless there are specific circumstances which are not addressed by the standard template. DSS's expectation is that modifications would be made rarely.

Compiling the assessment information pack

19. The completed letter is packaged with the following to form the information pack:
 - a. The information sheet – provided as-is and must not be amended.
 - b. Any supplementary information considered necessary to help the person prepare for their assessment. It is encouraged to keep this information to a minimum. This could include information such as:
 - details about the assessor (e.g., pepeha)
 - specific information about the assessment location and accessibility (e.g., parking, ramps)
 - details of supports arranged for the day (e.g., NZSL interpreter).
20. Before sending out the information pack, check that all required components are complete and accurate.

Recording Preparation for Assessment Information

21. To ensure consistent and accurate information is recorded, all information associated with preparation for assessment should be recorded in Socrates or respective internal systems. This includes:
 - e. the person's disability (or disabilities), information in support of them meeting the requirements for publicly funded health and disability services; and
 - f. evidence provided that supports identifying an impairment type(s) specified in the Disability Support Services Operational Policy; and

- g. details of the scheduled assessment (the agreed assessment time, date, location, and any required support needed for their scheduled assessment); and
- a. the information that was provided to the disabled person, or their family, whānau, guardian and/or carer, as part of the information pack. Include a copy of the letter, supporting documents provided, date it was sent and, if necessary, supporting notes about who it was sent to.

Reassessments

- 22. Non-urgent reassessments are temporarily paused until further notice. Disabled people, family, whānau, guardian and/or carer should contact their NASC or EGL site if they require an urgent reassessment or if their needs have changed.
- 23. This operational guidance supports NASC and EGL sites in responding when an urgent reassessment is required. An urgent reassessment applies when a disabled person experiences, or is anticipated to experience, a change in circumstances that poses an immediate or imminent risk to their safety or wellbeing. Under the Operational Policy Assessment and Allocation of Disability Support Funding (Policy), urgent reassessments apply from 23 February 2026.
- 24. Examples of changes in circumstance that may result in a level of risk, requiring urgent reassessment is set out in [Annex 1: Urgent Reassessment Criteria](#).
- 25. To ensure urgent reassessment requests are handled promptly, the usual preparation for assessment requirements do not apply. NASC and EGL sites do not need to prepare and send an information pack in advance. Instead, NASC and EGL sites are to prioritise arranging the assessment with the disabled person, family, whānau, guardian and/or carer, and then undertake the assessment in accordance with the remaining entirety of the Policy.
- 26. Ensure to record the reasons for the urgent reassessment, as determined against the criteria in [Annex 1](#), and record the scheduling information into the relevant systems.

Annex 1: Urgent Reassessment Criteria

Basic needs and safety:

- **Immediate safety concerns** to the disabled person, their family, whānau, guardian and/or carer, including where someone has experienced or is at risk of an incident of family or sexual violence, self-harm, or community harm.
- **Changes in the disabled person's condition**, such as an increase in the level of impairment or support need arising from progression of a diagnosed condition, or an emerging condition, where the disability supports currently allocated are no longer sufficient to manage safety risks. This may include life-stage-related changes such as puberty or a new diagnosis.
- **Changes in life stage** transitions, such as infancy, early childhood, school age, adulthood and aging, where the interaction between the person's disability and their circumstances creates an immediate or imminent safety risk.
- **Changes in living arrangements** such as moving to a new residence, entering or leaving residential care, or changes in household or partner arrangements, where these changes result in an increased or decreased need for disability supports to maintain safety or wellbeing.
- **Changes in equipment, support needs** or the type or intensity of supports required, where existing arrangements no longer adequately manage safety risks.

Changes in External Support

- **Changes in family or care arrangements**, such as support provided by family, whānau, guardian and/or carer, including where a primary carer becomes unable to continue providing care.
- **Changes affecting service availability** of services or supports that result in an immediate safety risk for the disabled person.

Social and Employment participation

Changes in participation, such as changes in education, employment or engagement in external supports provided to the disabled person and family, whānau, guardian and/or carer.