



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 Policy

Assessment and Allocation of Disability Support Funding

Effective from 1 April 2026

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Purpose

1. This operational policy establishes the requirements for the assessment and allocation of Disability Support Services (DSS) funded supports.
2. It supports fair, consistent, transparent and sustainable assessment and allocation practice across the disability support system and complements existing DSS policies and processes for assessment and funding allocation.
3. This operational policy gives effect to Cabinet’s July 2025 decisions on “Actions to Stabilise Disability Support Services: Assessment, Allocation and Flexible Funding” [[SOU-25-MIN-0088](#)].

Scope of this policy

4. This operational policy applies to:
 - a. people seeking access to DSS-funded services for the first time;
 - b. people who previously received DSS-funded services and are seeking to access services again;
 - c. disabled people currently receiving disability support who require a reassessment of the funding and services they have been allocated; and
 - d. disabled people who, as at 1 April 2026, are receiving disability support through individually managed arrangements.

Decision-making authority

5. This operational policy is underpinned by the following principles:
 - a. Disabled people make decisions about their own lives to the extent that they are capable of doing so and participate in the assessment and allocation process, including sharing their information with the Needs Assessment and Services Coordination (NASC) organisation or Enabling Good Lives (EGL) site.
 - b. NASCs and EGL sites make decisions about the support that is allocated to the disabled person and the accountability arrangements that apply to them, in accordance with this policy. These decisions are about the application of funding and supports, not about the disabled person’s general life choices.
6. Some or all of a disabled person’s decision-making authority may be assigned to a person with legal authority to make decisions on behalf of the disabled person. The people to whom decision making authority may be assigned include:
 - a. the parents or other guardian of a child 18 years or under the Care of Children Act 2004; or

- b. a welfare guardian appointed for an adult under the Protection of Personal and Property Rights Act 1988.
 - c. an agent who has been authorised by a disabled person to act on their behalf.
7. Where responsibilities or decision-making are assigned to a disabled person under this operational policy, this includes the disabled person or a person who has authority to act on their behalf.
8. Where an individual, such as a whānau or family member, or a carer, is supporting the disabled person but does not hold legal decision-making authority, they may be involved in assessment and planning processes with the disabled person's consent.

A. Overarching responsibilities

9. This section outlines the overarching responsibilities in relation to the assessment and allocation of DSS-funded disability supports. More detailed responsibilities for each part of the process are set out in the relevant sections of this operational policy.

Disability Support Services overarching responsibilities

10. DSS is responsible for:
- a. the stewardship and oversight of disability support funding, including ensuring funding is managed in a financially sustainable and responsible way;
 - b. providing oversight and governance of the assessment and allocation framework to ensure national consistency and alignment with government priorities;
 - c. developing and maintaining all DSS prescribed tools, operational policy, and DSS training material;
 - d. monitoring system-level performance to ensure DSS operates within approved budgets, and that funding is used appropriately and consistently;
 - e. providing timely support, guidance and training to NASC and EGL sites to enable correct application of process, policy and tools; and
 - f. maintaining, protecting and managing information received and held by DSS in accordance with all relevant security, privacy, information handling and record keeping requirements.

NASC and EGL sites overarching responsibilities

11. NASC and EGL sites are responsible for:

- a. operating in accordance with this operational policy and with reference to any supporting operational guidance;
 - b. managing the prioritisation and progression of reassessments, including prioritising or deferring them based on urgency, available capacity, and any applicable operational direction;
 - c. ensuring staff have completed required training and are competent in the assessment and allocation processes, including use of the DSS prescribed tools;
 - d. the quality, accuracy and completeness of all information input into the DSS prescribed tools, and of funding decisions made by NASC and EGL sites;
 - e. ensuring information about the disabled person is collected and shared only with their informed consent, and they have the opportunity to review the information to confirm that it is accurate, in accordance with the Privacy Act 2020 and the Health Information Privacy Code 2020;
 - f. entering complete, timely records of information into relevant systems;
 - g. maintaining, protecting, transferring and managing information in accordance with relevant privacy, information handling and record keeping requirements, as outlined in Section L;
 - h. providing information to DSS, as required, to support monitoring, reporting and system oversight; and
 - i. informing providers and hosts about a disabled person's My DSS Funding Plan, including the purposes for which the funding may be used, with the disabled person's consent or as otherwise permitted under applicable privacy legislation.
12. As set out in the MSD DSS [Operational Policy and Guidelines 2025/26 Financial Year Management of NASC and EGL Site Budgets](#), NASCs and EGL sites must manage the allocation of funding within their annual budgets, including making final decisions by applying relevant policies and tools appropriately and prioritising within regional budgets.
13. NASCs must operate in accordance with all their contractual obligations including the Service Specification: DSS Needs Assessment and Service Co-ordination Including Discretionary Funding.

Disabled people and family, whānau, guardians and/or carers overarching responsibilities

14. Disabled people are responsible for engaging with their NASC or EGL site to provide accurate and relevant information to support the assessment and allocation process. Family, whānau and/or carers may also provide information where appropriate and with the disabled person's consent.

B. Application to Choice in Community Living (CICL) or residential care

15. CICL and residential care are not subject to the full assessment and allocation process set out in this operational policy. Where a NASC or EGL site identifies that CICL or residential care is the appropriate support for a disabled person, the processes set out in sections D to G of this operational policy do not apply, except paragraph 23a (recording informed consent).
16. For CICL and community group home residential care, NASCs and EGL sites must undertake the assessment using the allocation tools that they were using prior to 1 April 2026 (they are not assessed using the OBIR web app and Indicative Range Calculator).

C. Pre-assessment

Purpose

17. Pre-assessment ensures that a disabled person seeking DSS-funded supports is provided with an assessment information pack about the assessment process so they know what to expect and how to prepare for their assessment.

Confirming eligibility for assessment

18. Before progressing a disabled person for an assessment and providing information about their assessment, NASC and EGL sites must confirm that they are eligible for assessment. This includes confirming that:
 - a. the disabled person is eligible for publicly funded health and disability services in New Zealand in accordance with the [Health and Disability Services Eligibility Direction 2011](#); and
 - b. sufficient evidence has been received to support identification of an impairment type specified in the MSD DSS *Eligibility Operational Policy*.
19. Eligibility for DSS-funded disability support services will be confirmed during assessment in accordance with the MSD DSS *Eligibility Operational Policy*.

Pre-assessment responsibilities

NASC and EGL sites

20. NASC and EGL sites must:
 - a. confirm the disabled person's eligibility for assessment, in accordance with paragraph 18;
 - b. engage with the disabled person or guardian to discuss the requirements for an assessment, including timing, location and any support needed to support their participation in the assessment conversation;

- c. complete the relevant DSS-prescribed letter template and provide this and the information sheet to the disabled person or guardian, ensuring all required fields are completed and content is not altered except where it may be necessary to reflect a person's circumstances;
- d. ensure any information included with the assessment information is limited to what is necessary and relevant to the upcoming assessment; and
- e. record eligibility confirmation and pre-assessment outcomes in relevant systems.

Disability Support Services

- 21. DSS must make available the standardised pre-assessment letter templates and information sheets for use by NASCs and EGL sites.

D. Assessment

Purpose

- 22. This section sets out the requirements for NASC and EGL sites to collect, review, and confirm information gathered from the disabled person and, where the disabled person chooses to involve them, their family, whānau, and/or carers, during the assessment conversation, and to record that information in the Outcome Based Indicative Range web application (OBIR web app).¹

Assessment responsibilities

NASCs and EGL sites

- 23. NASC and EGL sites must:
 - a. record informed consent from the disabled person prior to commencing the assessment;
 - b. record assessment information received in the OBIR web app by answering the questions, ensuring the information is complete, accurate and current in the formats required;
 - c. review the summary of assessment information with the disabled person, and their family, whānau, and/or carers where applicable, to ensure it accurately reflects the conversations and record it in the OBIR web app;
 - d. review the application of relevant policies and tools, and enter accurate information into the OBIR web app; and
 - e. submit the completed OBIR to DSS for calculation of the indicative range.

¹ The OBIR web app supports transparent and evidence-informed assessment practice by providing a structured set of questions to record assessment information in a nationally consistent way.

Disabled person

24. The disabled person must review and confirm that the summary of assessment information provided by the NASC or EGL site accurately reflects their conversations with their NASC or EGL site.

Disability Support Services

25. Until such time as the OBIR web app is developed to calculate indicative funding ranges, DSS will:
 - a. use the Indicative Range Calculator to calculate the indicative range for a disabled person, using the information received from NASCs and EGL sites through the OBIR web app; and
 - b. endeavour to respond to the relevant NASC or EGL site within two business days of receipt with either an indicative range or a request for further information.

E. Allocation

Purpose

26. The indicative range provides NASCs and EGL sites with a benchmark against which to determine a reasonable contribution towards supporting a disabled person given the barriers they experience. The indicative range reflects the level of support typically funded for disabled people in similar circumstances and is intended to be applied in most cases to enable nationally consistent decisions.
27. In some circumstances, the indicative range produced by the Indicative Range Calculator may not adequately reflect a person's individual circumstances. In these cases, an adjustment may be required to ensure the funding allocation represents a reasonable and appropriate contribution to the person's supports.
28. This section sets out the responsibilities of NASC and EGL sites in reviewing and agreeing an indicative range, which is later used to guide the allocation of supports.

Allocation responsibilities

NASCs and EGL sites

29. NASC and EGL sites must:
 - a. review the indicative range that has been calculated to confirm it reasonably reflects known information about the disabled person that was recorded in the OBIR web app;
 - b. where necessary, make changes to inputs in response to feedback to better reflect the situation of the disabled person and whānau than the answers included in the web app;

- c. only adjust the indicative range in circumstances when the indicative range provided by DSS does not reasonably and appropriately reflect the disabled person's circumstances, and the adjustment is justified in accordance with the criteria in the *Adjustments to the indicative range* section below;
- d. document the rationale for any adjustments, including the factors considered and evidence used; and
- e. ensure the completed assessment and indicative range is reviewed and approved in accordance with internal review and approval processes.

Adjustments to the indicative range

- 30. Any adjustments made by NASC and EGL sites must be:
 - a. reasonable, proportionate, and informed by evidence; and
 - b. clearly documented, including the rationale, factors considered, and evidence used.
- 31. Upwards adjustments to the indicative range may only be considered by NASC and EGL sites where:
 - a. it is not possible to support the disabled person safely within the initial indicative range, because the costs of providing safe and effective support exceed the general market costs;
 - b. environmental or other risks create extraordinary support costs; or
 - c. it can demonstrate that impacts on day-to-day life that can be clearly attributed to the matters that make the person eligible for DSS cannot otherwise be appropriately reflected in the existing questions in the web app.
- 32. Downwards adjustments to the indicative range may only be considered by NASC and EGL sites where:
 - a. a dual funding arrangement reduces the DSS-funding contribution; and
 - b. the budget position of the NASC and EGL site means that the indicative range is not something that can reasonably be made available to the person, and the range needs to be adjusted in the short term to set realistic expectations of availability.

Determining the allocation

- 33. NASCs and EGL sites must use the indicative range as the benchmark for funding.
- 34. NASCs and EGL sites can allocate support at a level above the indicative range if there is a one-off situation that does not impact on their support needs but does impact on the level of support required.

35. NASCs and EGL sites can allocate support at a level below the indicative range where, for example:
- a. a person chooses to receive a lower level of funded support;
 - b. a phased trial or time-limited supports are used while the most appropriate ongoing supports are identified, which may result in a temporary allocation below the indicative range;
 - c. the actual cost of providing the supports is materially lower cost than reflected in the indicative range; or
 - d. available funding requires prioritising in accordance with the MSD DSS [Operational Policy and Guidelines 2025/26 Financial Year Management of NASC and EGL site budgets.](#)
36. Allocating supports below the indicative range in the circumstances above does not require a downward adjustment to the indicative range itself. But, justification for any changes must be included in the OBIR web app.
37. The final decision on funding allocation, including all deviations from the indicative range, sits with the NASC or EGL site.

F. My DSS Funding Plan

Purpose

38. A My DSS Funding Plan records how a disabled person's funding, within the agreed indicative range, must be used, as agreed between the NASC or EGL site and the disabled person. It provides a shared understanding of the purposes and outcomes, and the supports to achieve these. The plan must be clear to ensure disabled people know how they can use their funding.

My DSS funding plan responsibilities

NASCs and EGL sites

39. NASC and EGL sites must:
- a. complete a My DSS Funding Plan collaboratively with the disabled person ensuring all required information is recorded to support implementation, monitoring and reporting;
 - b. ensure the disabled person's My DSS Funding Plan reflects the outcomes and support needs identified through assessment;
 - c. support the disabled person to make informed decisions about support options, including understanding trade-offs and affordability within the available indicative range;
 - d. ensure the disabled person meets eligibility requirements for all supports included in the My DSS Funding Plan, including those set out in relevant

service specifications and any additional requirements, for example, holding a current Community Services Card where Household Management supports are included;

- e. ensure the total cost of the support included in the My DSS Funding Plan is within the agreed allocation;
- f. ensure funding packages are submitted to the Review Panel for consideration where this is required by its [Terms of Reference](#);
- g. confirm the My DSS Funding Plan with the disabled person;
- h. where the disabled person has chosen to manage the use of their funding through a hosted flexible funding arrangement:
 - i. apply the requirements of the MSD DSS [Restrictions on Access to Hosted Budgets Operational Policy](#) when establishing or reviewing a hosted flexible funding arrangement;
 - ii. support the disabled person to choose a host;
 - iii. ensure that, when agreeing the My DSS Funding Plan, the supports included in the plan meet the requirements of the MSD DSS [Purchasing Operational Policy](#); and
 - iv. assign a host tier using the Host Tier Allocation Tool (HTAT) and record in relevant systems.
- i. where a disabled person has chosen to manage their funding through a non-hosted flexible funding arrangement (e.g., Carer Support):
 - i. ensure that, when agreeing the My DSS Funding Plan, the inclusion of the support meets the requirements of the MSD DSS [Purchasing Operational Policy](#); and
 - ii. ensure all purchases requiring prior approval are processed in line with the MSD DSS [Purchasing Operational Policy](#).
- j. ensure relevant DSS contracted providers and/or hosts are provided with the disabled person's My DSS Funding Plan and made aware of the purposes for which the funding can be spent on; and
- k. review and update the My DSS Funding Plan as required to reflect changes in circumstances, agreed outcomes or purposes for the spend of funding allocation.

Disabled person

40. The disabled person must:

- a. participate in any planning discussions to inform the development of the My DSS Funding Plan;
- b. confirm and agree to the My DSS Funding Plan;

- c. use their allocated funds in accordance with their My DSS Funding Plan; and
- d. notify their NASC or EGL site if:
 - i. their circumstances change in a way that may require a review or variation of their funding allocation or My DSS Funding Plan; or
 - ii. they wish to change the purpose for which supports are allocated in their My DSS Funding Plan.
- e. where a support is not managed through a hosted funding arrangement or a provider (e.g., a Flexible Disability Support provider), work with their NASC or EGL site regarding the purchasing and use of that support, including in accordance with the MSD DSS [Purchasing Operational Policy](#) (if relevant) or any issues questions or concerns relating to the purchasing and use of supports.

Hosts

- 41. Where a disabled person has chosen a hosted flexible funding arrangement, the responsibilities of the host are covered in the MSD DSS [Management of Hosted Flexible Funding Arrangements Operational Policy](#). Hosts must follow the requirements outlined in that policy.

G. Transitional arrangements

Transition to a My DSS Funding Plan

- 42. This section applies to disabled people who, as at 1 April 2026, manage their allocated funding through the following hosted flexible funding arrangements:²
 - a. Individualised Funding – Personal Care, Household Management, and Respite
 - b. Enhanced Individualised Funding;
 - c. EGL Personal Budgets, and
 - d. Flexible Disability Support, where the provider is acting as a host.
- 43. As at 1 April 2026, each disabled person to whom this section applies has been assigned a host tier by DSS.
- 44. At the disabled person’s next annual review, the NASC or EGL site must:
 - a. start the transition to a My DSS Funding Plan:
 - i. For disabled people with Individualised Funding or Enhanced Individualised Funding (as described in paragraph 42 a and b), the Service Authorisation must include details of the purpose of the

² Transitional arrangements do not apply to supports that are not managed through a hosted funding arrangement, including carer support and CICL.

funding and the intended supports to achieve that purpose, for each relevant services line.

- ii. For disabled people with EGL Personal Budgets or Flexible Disability Support (as described in paragraph 42 c and d), ensure that the Support Agreement or EGL Funding Plan is complete and up to date.

- b. provide information to the disabled person about the conditions and expectations for the use of their funding (as set out in the MSD DSS [Purchasing Operational Policy](#)) in a way that is appropriate to the disabled person to help ensure they understand their requirements; and
- c. review whether the assigned host tier remains appropriate.

45. The transitional arrangements are complete once a disabled person has been reassessed in accordance with the assessment and allocation process set out in this operational policy, including the completion of a My DSS Funding Plan.

Transitional responsibilities

NASCs and EGL sites

46. NASC and EGL sites must:

- a. ensure that the disabled person has a My DSS Funding Plan in place, whether by updating the Service Authorisation or by confirming that existing documentation meets the requirements in paragraph 44;
- b. confirm that the assigned host tier remains appropriate, or adjust the tier using the HTAT where required;
- c. confirm the My DSS Funding Plan with the disabled person; and
- d. provide the agreed My DSS Funding Plan and assigned host tier to the relevant host.

H. Urgent reassessment

47. A reassessment is urgent when a disabled person's situation changes in a way that means they may no longer be safe or have their basic needs met without timely support. An urgent reassessment should be considered where at least one of the following situations applies:

- a. there is an imminent risk of harm to the disabled person or others;
- b. there is an imminent admission to inpatient or mental health / hospital care if DSS support is not funded;
- c. the disabled person is leaving mental health / hospital care / forensic intellectual disability care or Oranga Tamariki care and DSS supports are required for safe discharge;

- d. there is an imminent loss of a placement or a home for the disabled person.
48. For urgent reassessments, NASC and EGL sites should make reasonable efforts to follow the pre-assessment requirements in Section B (Pre-assessment). Where following these requirements would delay a timely response, the NASC or EGL site must arrange the urgent reassessment with the disabled person and then proceed with the requirements set out in Section C (Assessment) and subsequent sections.
49. NASCs and EGL sites must record, in relevant systems, the reason for the urgent reassessment and the scheduling details.

I. Interim allocation in urgent circumstances

50. A NASC or EGL site may approve an interim allocation of DSS-funded supports only where urgent circumstances are present (as defined in paragraph 47) and where completing the standard assessment and allocation process would result in an unacceptable delay to addressing immediate risks to a disabled person's safety and wellbeing.
51. This applies to a person seeking access to DSS-funded supports for the first time, or for a disabled person requiring reassessment, where their situation meets the urgent circumstances described above.
52. An interim allocation may only be used to provide the supports necessary to address the urgent circumstances and does not replace the requirement to complete an assessment and allocation in accordance with this operational policy.
53. An interim allocation must:
- a. be approved by the NASC or EGL site in accordance with their internal approval process; and
 - b. have a defined end date not exceeding 12 weeks from the date of approval.
54. When an interim allocation is approved, the NASC or EGL site must progress the assessment and allocation process as soon as practicable and complete that process within the interim allocation period.
55. The NASC or EGL site must record the reason for the interim allocation, the supports approved, and duration of the interim allocation in relevant systems.

J. Handling disputes and complaints

56. NASCs and EGL sites must have processes in place for managing disputes and complaints and must make reasonable efforts to resolve them. This includes

undertaking internal, and where appropriate, external peer review to ensure decisions are reviewed objectively and consistently.

57. NASCs and EGL sites must inform the disabled person, at the start of their engagement and again where a dispute or complaint arises, of their right to provide feedback or make a complaint, and provide information on how to do so, including:
 - a. the NASC or EGL sites' own complaints process;
 - b. the complaints process available through DSS; and
 - c. the right to make a complaint to the Health and Disability Commissioner.

K. Training and support

58. NASC and EGL site staff must be trained on the assessment and allocation process, including the use of tools, and information security. DSS has provided initial training to designated NASC and EGL site trainers, who are responsible for delivering training within their organisations.
59. Where there are further updates to assessment and allocation, training materials will be reviewed and updated accordingly. Depending on the extent of any change, DSS may provide additional training to support consistent implementation.

L. Privacy, secure information handling and record keeping

60. The OBIR web app, the Indicative Range Calculator, and the HTAT, including all associated intellectual property, is owned by MSD and must only be used for its intended purpose. They must not be disclosed to any third party unless explicit authorisation has been granted by MSD.
61. All information collected by NASCs and EGL sites to fulfil the requirements of the assessment and allocation process outlined in this Operational Policy must be handled and managed in accordance with the Privacy Act 2020, the Health Information Privacy Code 2020, the Public Records Act 2005, Digital.Govt.NZ's Standard for information sharing with third parties, all applicable laws and the temporary care records protection instruction, any general notice or instruction issued by Archives New Zealand (Archive Instruction) and any information security requirements. For NASCs, the requirements of the NASC Service Specification – DSS Needs Assessment and Service Co-ordination (DSS1040) Including Discretionary Funding (DSS1039D) also apply.
62. Information held about a disabled person may be shared with providers or parties involved in determining and delivering supports only with the disabled

person's consent, or where otherwise permitted under the Privacy Act 2020, and only to the extent necessary for those parties to carry out their functions.

63. Information held about a disabled person must be made available in response to a request made in accordance with the Privacy Act 2020, subject to any lawful grounds for withholding information.

Glossary: Terms and definitions

Term	Description
Agent	A person authorised by a disabled person to act on their behalf.
Assessment and allocation	The process that NASCs and EGL sites undertake to assess eligibility for, and allocate, DSS-funded disability supports. This process includes pre-assessment, assessment, allocation, and completion of a My DSS Funding Plan. It includes initial assessments and allocations and reassessments and/or reallocations.
Disabled person	An individual being assessed for, or receiving, DSS-funded supports.
Disability Support Services (DSS)	A business group within the Ministry of Social Development (MSD).
Guardian	A person who has legal authority to make decisions on behalf of the disabled person. This includes guardian of a child appointed under the Care of Children Act 2004, and a welfare guardian appointed for an adult under the Protection of Personal and Property Rights Act 1988.
Host	An organisation contracted to DSS to provide host services or a flexible disability support provider when they are offering host services.
Host tier	A tier level assigned to a disabled person (using a hosted flexible funding arrangement) by a NASC and EGL sites, using the Host Tier Allocation Tool. The tier determines the level of guidance, and support the host provides, and sets the expectations for both the host and the disabled person in managing the funding.
Hosted flexible funding arrangement	An arrangement in which the disabled person manages their own DSS-funded disability support funding with the assistance of a host.
Indicative Range Calculator	The Indicative Range Calculator translates assessment information into an indicative funding range.
My DSS Funding Plan	An agreement with a NASC or EGL site setting out how the disabled person agrees to

Term	Description
	<p>use the funding they have been allocated. The agreement may take several forms:</p> <ul style="list-style-type: none"> • Where people have received a new allocation of support, or had their support allocation reviewed or reassessed, on or after 1 April 2026, the My DSS Funding Plan described in this operational policy. • Where people have existing support allocations on 1 April 2026 but have not had their allocations reviewed or reassessed in accordance with this operational policy: <ul style="list-style-type: none"> ○ Individual Service Plans for an Individualised Funding allocation. ○ Support Agreement and/or EGL Funding Plan for a Flexible Disability Support allocation.
Needs Assessment and Service Coordination organisation (NASC)	Organisations that are contracted to DSS to carry out needs assessments, coordinate services to meet those needs, allocate supports and services funded by DSS that respond to needs, and managing the allocation of support within their region's annual budgets.
OBIR web app	The web-based application used by NASCs and EGL sites for the purposes of recording assessment information, requesting an indicative funding range, and creating and maintaining My DSS Funding Plans for disabled people.
Temporary care records protection instruction	Issued by the Chief Archivist in March 2024, this protection instruction withdraws and replaces the disposal moratorium on records relevant to the Abuse in Care Royal Commission of Inquiry. The instruction is to protect care records while work is undertaken to review the retention and disposal of State care records.
Host Tier Allocation Tool (HTAT)	The tool used by NASCs and EGL sites to determine the appropriate host tier for a disabled person.

**Disability
Support Services**



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

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