



# **Band Allocation Tool (BAT) User Guide**

Version 1.02 – 1/12/2025



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# About this guide

This guide is intended to support NASCs and EGL sites to work with disabled people and their families in establishing and reviewing residential care arrangements from December 2025. It supports you to engage and use the Band Allocation Tool effectively.

Through the service specification, disabled people are provided with a number of choices about how a residential care arrangement will work for them. This guide is intended to assist you to explore those choices together.

Not all of these choices will play a direct role in pricing the service – but it is important that these choices are made clearly before moving to pricing, so that there are shared expectations of what will be delivered, and how.

Planning supported by this guide is intended to make clear up front what the disabled person and their family are looking for in a residential care arrangement, and what the provider is committing to support through entering into or renewing an arrangement.

This guide is also intended to support you to capture the information needed to price residential care packages appropriately. It provides guidance on rating the support questions in the BAT, to accurately estimate the amount of support required to be priced by the Global Pricing Tool.

## Planning approach used in this guide

The residential care service specification has the concept of Home at its' centre.

For example:

- *“The Ministry purchases community residential support services (the Services) for people with disabilities who need this level of support, so that they can enjoy a good quality of life and live in a place that feels like home” - Service Definition*
- Residential providers must provide a *“home [that] is accessible, homely, clean, well maintained and provides privacy and autonomy.”*
- *“Putting people at the centre of support enables them to have greater choice and control over their home and environment.”*

To deliver on the service specification, this planning guide takes the approach of working through:

- What makes for a good home, in general and specifically for this person
- What the disability-related challenges someone might experience to living well in a residential care home are
- What is necessary to support the disabled person to overcome those challenges and *“enjoy a good quality of life and live in a place that feels like home.”*

# Accessing BAT, GPT and the Facilities List

- Information on how to access the BAT and GPT tools, as well as the Facilities List, can be found at - [How to access BAT and GPT | Disability Support Services](#)

## Additional support material

- Additional support material can be found at - [Training and Support – Residential Pricing | Disability Support Services](#)

You should check this site on a regular basis to make sure that you are using the most recent version of this User Guide

# Using the Band Allocation Tool

## Domains

There are a number of domains/dimensions to home life that can be explored through the Band Allocation Tool

- Being at Home, Home Life
- Preparing myself for my day
- Having my own evening routine
- Settling in and feeling safe for the night
- Having my space and making a space mine
- Being responsible for my home
- Maintaining connection and pursuing my interests
- Doing things that keep me well
- Enjoying my privacy
- Feeling safe and being safe, day-to-day

<p>Preparing myself for my day</p>	<p>Having my own evening routine</p>	<p>Settling in and feeling safe for the night</p>	<p>Having my space and making a space mine</p>
<p>I'd like to summarise my support requirements</p>	<p>I'd like to summarise my support requirements</p>	<p>I'd like to summarise my support requirements</p>	<p>I'd like to summarise my support requirements</p>
<p>Feeling safe and being safe, day-to-day</p>	<p>Being at home and home life</p> <p>My Details      Add details of proposed house</p>		<p>Being responsible for my home</p>
<p>I'd like to summarise my support requirements</p>	<p>I'd like to summarise my support requirements</p>	<p>I'd like to summarise my support requirements</p>	<p>I'd like to summarise my support requirements</p>
<p>Enjoying my privacy</p>	<p>Doing things that keep me well</p>	<p>Maintaining connection and pursuing my interests</p>	
<p>I'd like to summarise my support requirements</p>	<p>I'd like to summarise my support requirements</p>	<p>I'd like to summarise my support requirements</p>	

Each of the domains in **Plan View**

## Which services is the Band Allocation Tool for?

The Band Allocation Tool is used to support planning and pricing Community Residential Care arrangements. It replaces the use of the iCare for those services.

The Band Allocation Tool is not used for pricing Aged Residential Care, High and Complex (Forensics) services, or Choices in Community Living. It is also generally unsuitable for estimating the appropriate size of higher cost Individualised Funding packages (because the scope of residential services and Individualised Funding differ).

## What is the relationship between the BAT and the rest of the assessment and allocation process?

The Band Allocation Tool is primarily a service coordination tool. Having established a person's functional needs through the assessment process, the BAT supports planning a response to those needs through delivery of a residential care service, and estimating the resource required to do that appropriately.

This version of the Band Allocation Tool is intended to operate within the current needs assessment and service coordination process. A future version may be released if required to better integrate with any future changes to needs assessment.

## What is the relationship to the Global Pricing Tool for residential care, specifically?

The Band Allocation Tool supports capturing information about a person, summarising it into some key measures, before that information can be entered into the Global Pricing Tool for Residential Care and a band or other price is allocated.

The Band Allocation Tool of itself does not include price information, instead it captures information on:

- The location and size of the house a person may live in
- The support requirements of the person in question, across:
  - the busy times of the day (morning and evening)
  - through the middle of the day, when they may be out and about
  - overnight

The Band Allocation Tool also identifies where the support requirements of a person cannot be accommodated within the usual residential care price bands, and an exceptional rate may be required.

## What information does the Band Allocation Tool capture?

The Band Allocation Tool captures information about:

- *How* the person might be supported – what is important to them in achieving a ‘good quality of life,’ and what practices support an experience of residential care feeling like home
- *How much* support the person might require, to aid in pricing a package

The relative balance of the information you collect will depend on:

- where someone is in the process of establishing or renewing a residential care arrangement, and
- The degree of change that might be being sought to an existing package.

## What information would be shared with the provider?

Much of the information contained in the BAT would form a useful basis for discussing with a provider what would be involved in supporting a disabled person. It may also support ongoing review with a provider of how different elements of a service are performing for the disabled person.

The plan contained in the BAT is the disabled person’s own information – it can be requested by them, and shared by them, with whomever they choose.

Where part or all of the BAT has been shared with a provider, and they have made available additional information, NASC must form a view of whether or how it is reasonably taken into account. Nevertheless, as a pricing tool, the BAT needs to reflect the NASC’s independent view of what is required to support the disabled person.

## Using the BAT to support planning

The Band Allocation Tool contributes to the general move towards a more planned approach in NASC and across the system. Whilst detailed service planning is and continues to be the role of the service provider, the BAT process is intended to capture the foundations of what it is most important that a detailed support provision plan responds to or accommodates.

In some instances, such as where a residential care entry is being planned for over an extended period you might use the mind map view to capture what is most important to the person, and to support them to explore with different providers whether that can be accommodated in a residential care setting.

In other instances, you might use the planning component of the Band Allocation Tool to strengthen the safeguarding of an individual. Having a clear plan of what good looks can highlight key risks and mitigations, the role of others in supporting the decision making of the disabled person and checking on their wellbeing. As a set of expectations, it can support good conversations between families, advocates, NASC, and the DSS Quality Team and the provider, on how well a service is doing for someone, and what might need to be changed to work for them.

The Band Allocation Tool is primarily a tool to support pricing. Planning plays a role in highlighting what an integrated response to the person's support requirements might involve, as a basis for being able to accurately and fairly price that support.

# Purpose, Plan View, and List View

The Band Allocation Tool displays information on three tabs.



*The three tabs available from the bottom left of the BAT tool*

## Purpose

**Purpose** is like an 'About' page – It contains a reminder that you need to be careful about storing and/or sharing this file because it will contain personally identifiable information. You're unlikely to need to make use of the **Purpose** tab beyond taking a quick look at it when you open the file for the first time.



*The **Purpose** tab*

## Plan View

**Plan View** is a 'mind map' of boxes, which allow you to capture points that are important to the disabled person through the course of conversation, and plan for support requirements and other parts of living home life that are part of creating 'a good quality of life in a place that feels like home'.

Preparing myself for my day	Having my own evening routine	Settling in and feeling safe for the night	Having my space and making a space mine
I'd like to summarise my support requirements			
Feeling safe and being safe, day-to-day	Being at home and home life		Being responsible for my home
I'd like to summarise my support requirements	My Details    Add details of proposed house		I'd like to summarise my support requirements
	Enjoying my privacy	Doing things that keep me well	Maintaining connection and pursuing my interests
I'd like to summarise my support requirements			

### Plan View

## Text boxes in Plan View

Each of the domains that surround **Being at home and home life** include text boxes that allow you to record additional information. This is useful for information that doesn't fit into the other aspects of **Plan View** to be discussed in a moment.



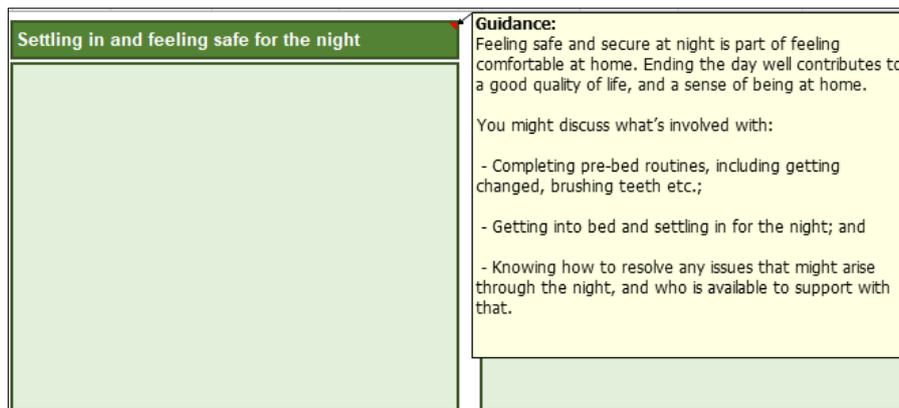
If you need to drop down to a new line when entering text into these boxes, make sure to hold down the **alt** key on your keyboard before tapping the **Enter** key.

Preparing myself for my day	Having my own evening routine
<i>Might depend on what I have on for the day, and how the night before has gone.          Must have time to walk the dog before leaving the house, otherwise she chews stuff.          Can generally do most of my routine (getting up, showered, dressed) myself, but:          - I need someone to check the mix of hot and cold water in the shower, as I can get this wrong and hurt myself;          - I can get confused when the toaster doesn't do what I want, and stick things in it to try and make it work the way I want. I don't understand why that is dangerous.</i>	
I'd like to summarise my support requirements	I'd like to summarise my support requirements

An example of a text box completed in **Plan View**

## Hover-over help in Plan View

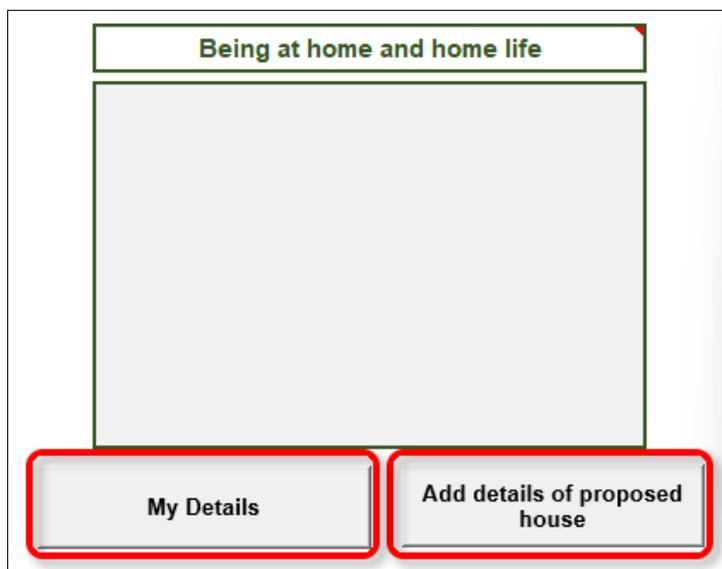
In **Plan View**, each of the domains have a small red triangle (▼) as part of their title, indicating that information is available. If you hover over the domain, you get access to help information similar to the information provided in this User Guide.



*An example of hover-over help in **Plan View***

## Buttons in Plan View

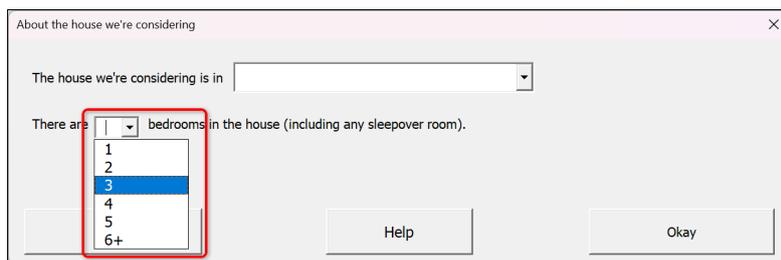
The main way that you interact with **Plan View** is via buttons. The buttons give you access to information and pop-up windows that allow you to enter information into the BAT.



*An example of two buttons in **Plan View***

## Drop-down options in Plan View

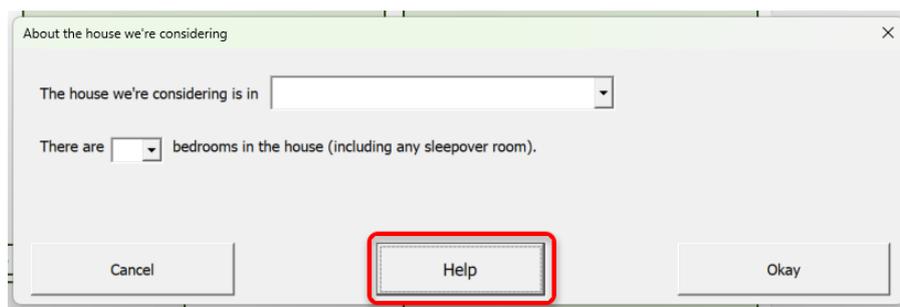
Some sections of **Plan View** feature drop-down options. To select an option, click on triangle pointing down (▼) and select the value that you want.



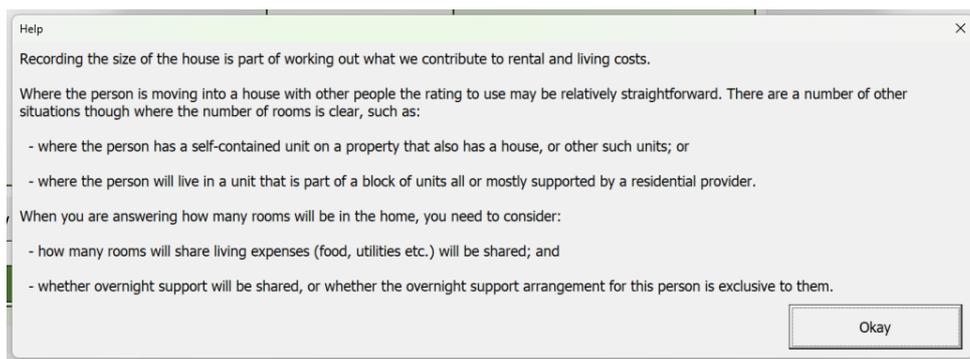
*An example of drop-down options in **Plan View***

## Help buttons in Plan View

Many of the pop-up windows in **Plan View** feature **Help** buttons, giving you access to help information related to the section of **Plan View** that you are working on in that moment.



*An example of a **Help** button in a pop-up window in **Plan View***



*An example of help information available after clicking a **Help** button*

## Printing/Sharing Plan View

If you need to share information that you have entered into the boxes, you can print out the **Plan View** as an A3 printout or PDF. Note that information entered via the buttons in **Plan View** will not appear in the print-out of PDF.

## List View

**List View** has all of question fields laid out as a list and provides summary information about the resulting support levels. It also includes the information needed to be entered into the GPT to calculate a residential price band.

The screenshot shows a 'Pricing Output' worksheet. It includes a summary section with a table for support levels (Morning and Evening, Day, Night) all set to 'Yes'. There are two charts: 'Position of proposed package in residential care population' and 'Proposed support mix'. Below the charts are input fields for 'Person's details' (First Name, Last Name, DOB, NHI, Date this plan completed) and 'Inputs for GPT' (Capacity, Sleepover room, Sleepovers, Transportation, Core Shift (Care Ratio), Assistance Shift (Care Ratio)).

**List View**

## Text boxes in List View

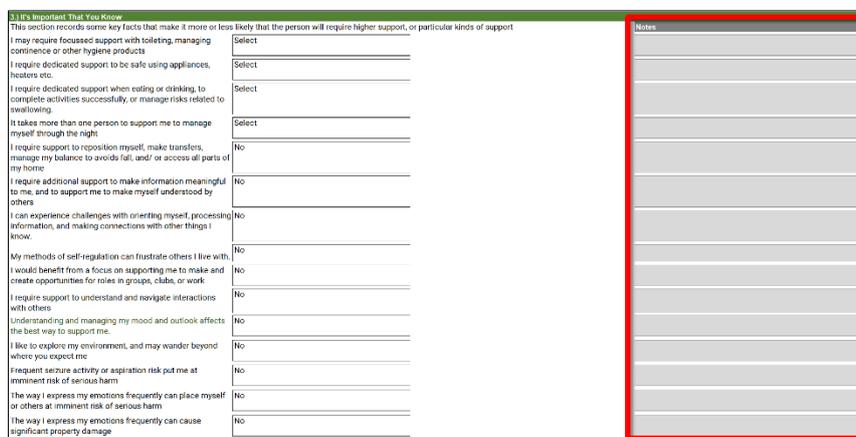
Some areas of the **List View** feature boxes to enter text into, as you would in a typical spreadsheet.

The close-up shows the 'Person's details' section with the following text boxes: First Name (Joe), Last Name (Bloggs), DOB (01/01/1970), NHI, and Date this plan completed.

An example of text boxes in **List View**

## Notes in List View

There are a number of **Notes** boxes in **List View**. These boxes could be used for additional notes as you complete the BAT and should be used by a reviewer to add comments to the BAT as they conduct a review. **Notes** are also displayed when you choose to print out the **List View**.



3.) It's Important That You Know

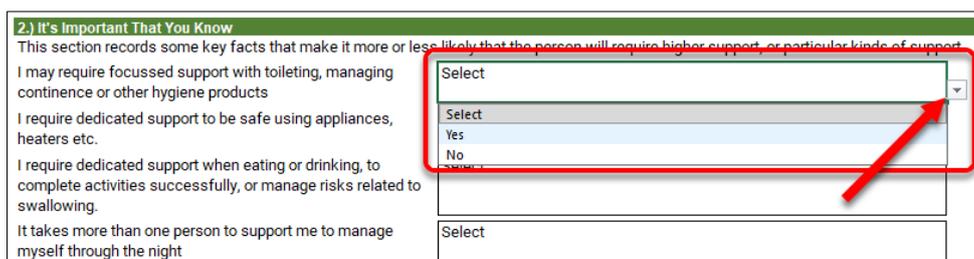
This section records some key facts that make it more or less likely that the person will require higher support, or particular kinds of support

I may require focussed support with toileting, managing continence or other hygiene products	Select	Notes
I require dedicated support to be safe using appliances, heaters etc.	Select	
I require dedicated support when eating or drinking, to complete activities successfully, or manage risks related to swallowing.	Select	
It takes more than one person to support me to manage myself through the night.	Select	
I require support to reposition myself, make transfers, manage my balance to avoid falls, and/or access all parts of my home.	No	
I require additional support to make information meaningful to me, and to support me to make myself understood by others	No	
I can experience challenges with orienting myself, processing information, and making connections with other things I know.	No	
My methods of self-regulation can frustrate others I live with, I would benefit from a focus on supporting me to make and create opportunities for roles in groups, clubs, or work	No	
I require support to understand and navigate interactions with others	No	
Understanding and managing my mood and outlook affects the best way to support me.	No	
I like to explore my environment, and may wander beyond where you expect me.	No	
Frequent seizure activity or aspiration risk put me at imminent risk of serious harm	No	
The way I express my emotions frequently can place myself or others at imminent risk of serious harm	No	
The way I express my emotions frequently can cause significant property damage	No	

An example of **Notes** boxes in a section of **List View**

## Drop-down options in List View

Some sections of **List View** feature drop-down options similar to those in **Plan View**. These can be found by clicking on boxes labelled **Select**, which will then give you access to a small drop-down button (▼) to select from a number of options.



2.) It's Important That You Know

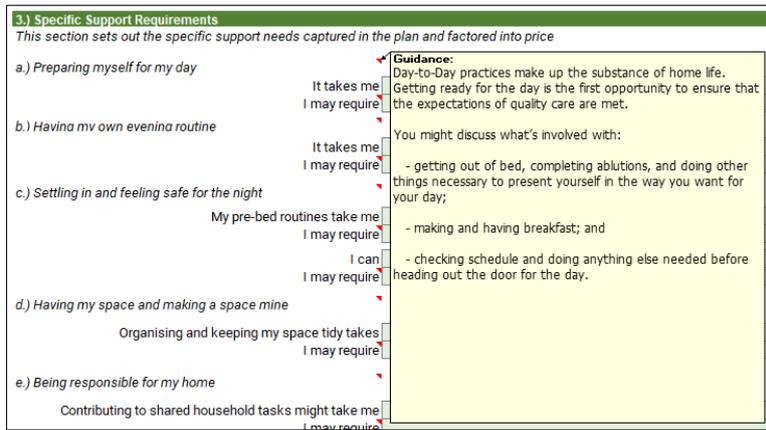
This section records some key facts that make it more or less likely that the person will require higher support, or particular kinds of support

I may require focussed support with toileting, managing continence or other hygiene products	Select
I require dedicated support to be safe using appliances, heaters etc.	Select
I require dedicated support when eating or drinking, to complete activities successfully, or manage risks related to swallowing.	Select
It takes more than one person to support me to manage myself through the night	Select

An example of drop-down options in **List View**

## Hover-over help in List View

In some sections of **List View**, a small red triangle (▼) is an indication that information is available. If you hover over the icon, you get access to help information similar to the information provided in this User Guide.

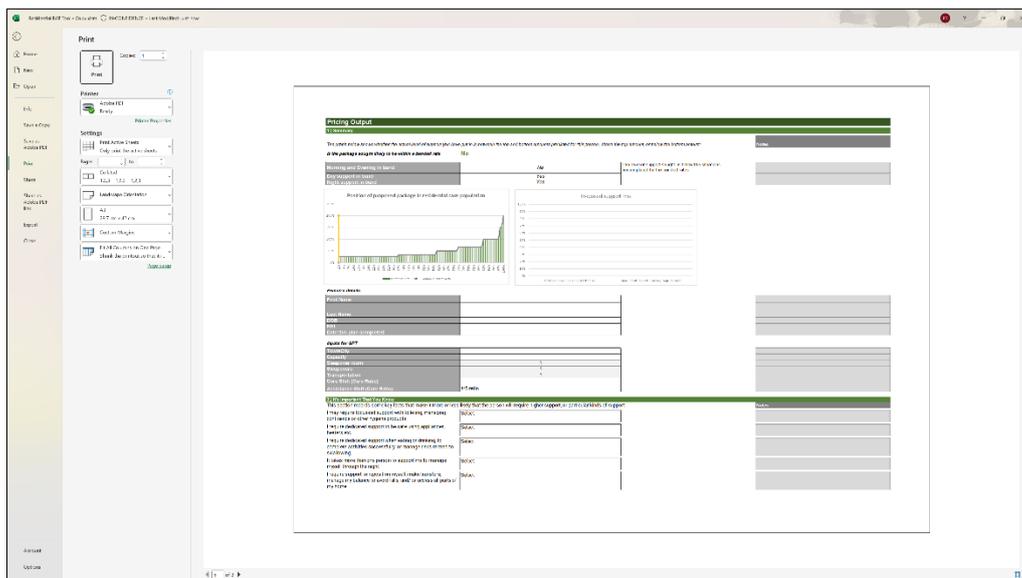


An example of hover-over help in **List View**

## Printing/Sharing List View

If you need to share information that you have entered into these text boxes, you can print out the **List View** as an A3 printout or PDF.

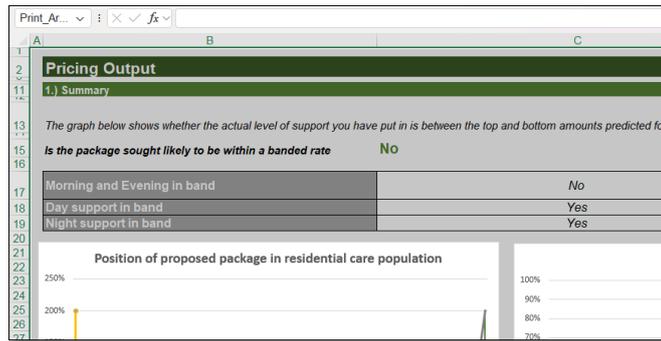
By default, List View is set to print as approximately three A3 pages.



The default print setting for **List View** will print data and notes that have been entered

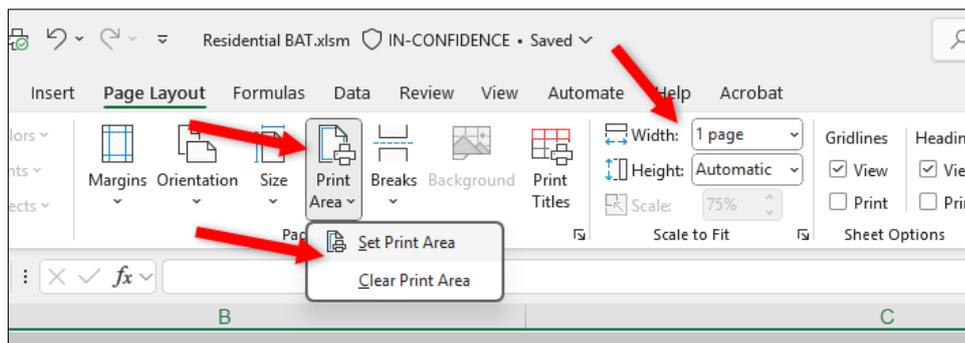
If you are getting different results when attempting to print, do the following:

- Click (and hold the mouse button down) below the bottom-right **Notes** field and drag all the way up to the top-left of the screen. The area will indicate it's selected by going slightly dark.



*List View* will show the area you have selected by going slightly dark

- Go to the **Page Layout** tab and select **Print Area – Set Print Area**
- Change the Width setting to **1 page**.
- Change the Height setting to **Automatic**.



*Print options for printing in List View*

- Press **CTRL-P** on your keyboard.
- You can then either print to PDF or to a printer.

## Working with the views

In practice, you might mix and match between the two views in different circumstances. Which view you use in the Band Allocation Tool will depend on:

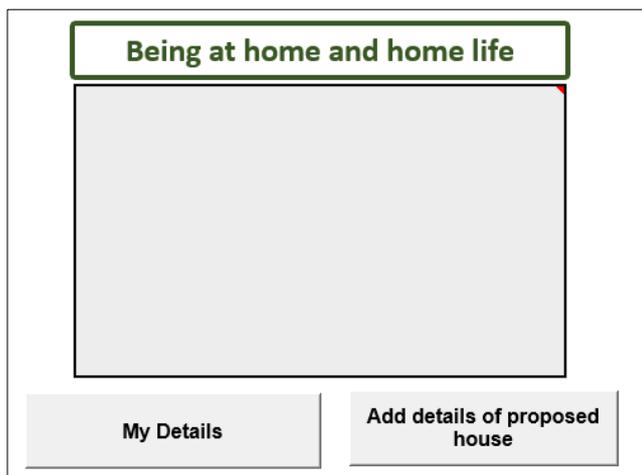
- how the disabled person and their family prefers to be engaged with (e.g. do they want to plan collaboratively through a process, or is their preference that 'the paperwork' be sorted out in the background); and
- what is right for the present situation (e.g. longer-term planning for a residential care arrangement may be best done in **Plan View**, urgent or short-term packages may most efficiently be done in **List View**).

In general, you might rely more on the **List View** where reassessment has indicated that little or no change is required to the way the person is supported, and the view can be used to update the package pricing with a GPT band.

# Being at Home, Home Life

This is an opportunity to capture things that are important to the disabled person about home life.

Especially for those who are entering residential care for the first time, there can be some things that particular assurance is sought for – these can be ‘little’ things that make up what is familiar about home – habits and practices that help someone feel settled and comfortable – or they can be bigger things about activities or roles that are important to someone’s identity or connection with family and culture.



The image shows a screenshot of a web form. At the top, there is a header box with the title "Being at home and home life". Below the header is a large, empty rectangular text area for input. At the bottom of the form, there are two buttons: "My Details" on the left and "Add details of proposed house" on the right.

You might discuss with the disabled person and their family:

- what practices are part of home feeling like home?
- are there particular cultural or religious practices that are part of what home looks like for you?
- are particular celebrations important to you?
- are there particular activities or supports that you want assurance will occur or be in place?

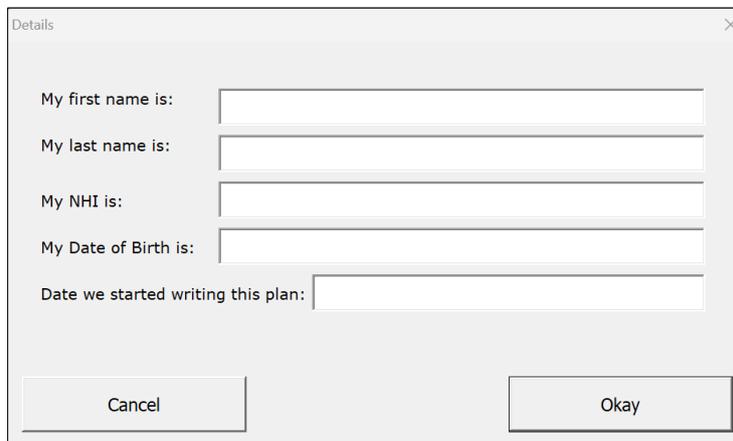
## Relationship to service specification

This summary field relates to the following section of the service specification:

*“The Ministry purchases community residential support services (the Services) for people with disabilities who need this level of support, so that they can enjoy a good quality of life and live in a place that feels like home.”*

## My Details

This allows you to capture a number of details about the person that this particular Band Allocation Tool relates to. These details become part of the data string from the BAT that is later uploaded into Socrates and supports us to link and validate BAT data with allocation, utilisation, and other data held about the person and their supports.



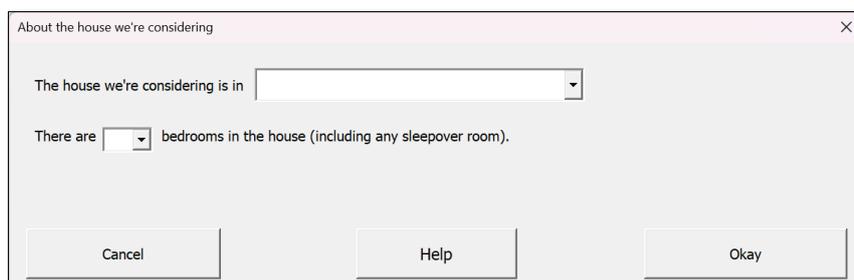
**My Details in Plan View**

Person's details	
First Name	
Last Name	
DOB	
NHI	
Date this plan completed	

**My Details in List View**

## Add details of proposed house

Record some details about the house the person may be living in, to support effective pricing of living costs. In **Plan View**, this looks like:



**About the house we're considering in Plan View**

Town/City	
Capacity	

**About the house we're considering in List View**



The locations included in the drop-down are organised in alphabetical order.

If you cannot find the exact location, select the closest match. It is the overall region that is important for the calculation.

## Location

Select the general location that the service is being delivered in. This information supports understanding what allowance must be made for regional differences in living costs, and whether a rural/urban adjuster may need to apply to some costs.

The location you record is later entered into the GPT, which automatically makes any adjustments for location-based variation in living costs.

## House size

The BAT (and the GPT) does not need to know about the number of other people in the house, or their support requirements (see the section above on exclusivity indicators). The size of the house is used primarily for estimating living costs and understanding between how many people overnight support staff are shared.

Where the person is moving into a house with other people the rating to use may be relatively straightforward. There are a number of other situations though where the number of rooms is clear, such as:

- where the person has a self-contained unit on a property that also has a house, or other such units; or
- where the person will live in a unit that is part of a block of units all or mostly supported by a residential provider.

When you are answering how many rooms will be in the home, you need to consider:

- how many rooms will share living expenses (food, utilities etc.) will be shared, and
- whether overnight support will be shared, or whether the overnight support arrangement for this person is exclusive to them.

# Support indicators related to tasks, activities, or responsibilities

Questions about tasks, activities, or responsibilities generally involve two questions:

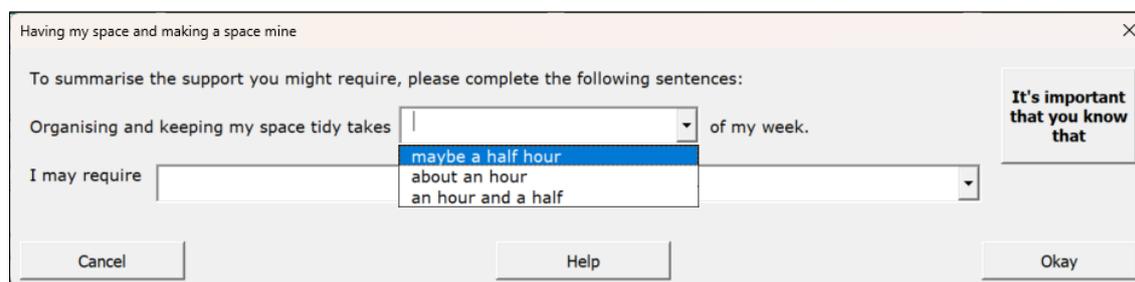
- *Time taken* – the first question for most indicators is how much time an activity might take a disabled person.
- *Exclusivity* – the second question in most indicators is what kind of support might be required, ranging from **someone being available just in case** through to **2 people supporting me with all tasks**. This supports pricing by determining the potential (or not) for some of the support to be shared.

These two things taken together support us to estimate an appropriate amount to pay for the work that is done exclusively with the person, and that is shareable with other people.

## Time taken

Individual questions in the support indicators estimate the amount of time required for the person to undertake the relevant activities. This differs from the previous 'minutes of support' measure. This change has been made so that, through the BAT, we can better understand how someone's day looks and make appropriate allowance for support during less task intensive times.

Time taken questions usually take a form similar to these examples:



An example of **Time taken** in **Plan View**

d.) *Having my space and making a space mine*

Organising and keeping my space tidy takes  of my week.  
I may require

An example of **Time taken** in **List View**

## Exclusivity

Exclusivity questions usually take a form similar to these examples:

Preparing myself for the day

To summarise the support you might require, please complete the following sentences:

It takes me  to prepare myself in the morning.

I may require

no support  
someone being available just in case  
prompting, if I get distracted or stuck on something  
someone supporting me to understand or complete a few tasks  
**someone supporting me to understand or complete many tasks**  
supporting me to understand or complete all or almost all tasks  
1 person supporting me to understand or complete most tasks, support from 2 people sometimes  
support from 2 people for all tasks

It's important that you know...

Cancel Okay

An example of **Exclusivity** in **Plan View**

Preparing myself for my day, my way

It takes me  to get ready in the morning.  
I may require

An example of **Exclusivity** in **List View**

Where the need for someone to be exclusively available to the disabled person is lower, they are more able to share support and that is reflected in the way the person's support package is banded.

Where the need for someone(s) to be exclusively available to the disabled person is higher, they are less able to share support, and that also is reflected in how the person's support package is banded.

If you are unsure what rating to apply:

<i>Someone being available</i>	Someone supporting this person would be able to spend 40-50 minutes also supporting others, in any given hour.
<i>Prompting</i>	Someone supporting this person would also be able to spend 30-40 minutes supporting others, in any given hour.
<i>Someone supporting me to understand or complete a few tasks</i>	Someone supporting this person would also be able to spend 20-30 minutes supporting others, in any given hour.

<i>Someone supporting me to understand or complete many tasks</i>	Someone supporting this person would also be able to spend 15-20 minutes supporting others, in any given hour.
<i>Someone supporting me to understand or complete all or almost all tasks</i>	someone supporting this person would generally not be available to support others, through the period this person undertakes these activities.
<i>1 person supporting me to understand or complete most tasks, support from 2 people sometimes</i>	someone supporting this person would generally not be available to support others through the period this person undertakes these activities, but they may share support from a second person with others
<i>Support from 2 people for all tasks</i>	2 people would support this person, and generally would not be available to support others, through the period his person undertakes these activities.

DSS expects that providers will continue to work with the disabled people they serve to give effect to the requirement in the service specification that:

*“People will be supported to live in a home of their choice (where a choice of home exists) and as far as possible, with people with whom they are compatible.”*

Within that requirement, the way exclusivity influences pricing is expected to encourage providers to organise the choices they can make available in a way that makes efficient use of funding for living costs.

## Support indicators that relate to less predictable events, or particular safety risks

Some support indicators relate to particular risks or less routine events. These are found only in the **Feeling safe and being safe** and **Doing things that keep me well** domains.

These questions usually ask about:

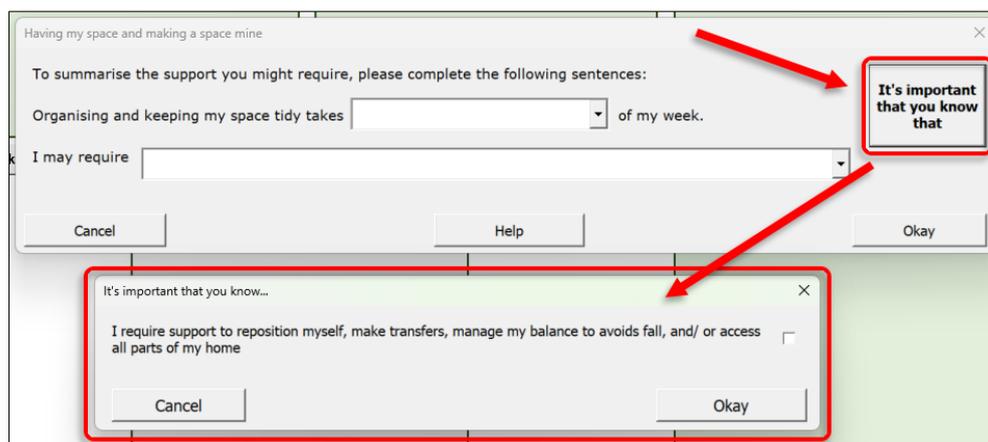
- how often those events might occur.
- what parts of the day they most effect, and
- what support might be required to manage those events.

The results of these questions together calculate what support should be included for events where the timing and presentation of their occurrence is less predictable, and support nevertheless must be in place to respond if they do.

When you are answering these questions, please rate the likelihood of occurrence based on what could happen if appropriate support is not available, rather than rating only residual risk that exists with any current supports that are in place.

## It's important that you know... indicators

The focus of the BAT is on understanding and planning for someone's aspirations for a good quality of life in residential care. Alongside the sliding scales for support, there are several **Yes/No** indicators included, to identify the presence of particular kinds of requirements or risks.



An example of an **It's important that you know...** indicator in **Plan View**

This reflects that, as well as general levels of support required, there can be specific risk or requirements that disabled people, or their families can be anxious for assurance that the system is taking into account.

The **It's important that you know...** indicators provide space to capture the presence of some common risks and requirements that influence what is required to deliver support safely and effectively.

# Domain - Preparing myself for my day

Day-to-day practices make up the substance of home life. Getting ready for the day is the first opportunity to ensure that the expectations of quality care are met.

You might discuss what's involved with:

- getting out of bed, completing ablutions, and doing other things necessary to present yourself in the way you want for your day.
- making and having breakfast, and
- checking schedule and doing anything else needed before heading out the door for the day.

## Relationship to service specification

This domain is used to plan for, and estimate a level of support required...

*"To carry out activities of daily living and personal care as required, including using the toilet, dressing, bathing, hair washing, teeth cleaning, toe and fingernail care, eating and mobility. This includes supporting the Person's dignity of personal appearance appropriate to the place and conditions while maintaining choice."*

## Pricing indicators

In **Plan View**, click on **I'd like to summarise my support requirements** under the **Preparing myself for my day** planning box.



If you require additional advice to determine which support levels to select in the drop-down, click **Help** or the section on support indicators in this guide.

***Preparing myself for my day options in Plan View***

***Preparing myself for my day options in List View  
in the Specific Support Requirements section***

## It's important that you know...

This indicator is intended to identify where managing continence products, catheterisation, bowel care etc., influences the skills required and time necessary to manage parts of morning (or evening) routines safely.

## Domain - Having my own evening routine

You might discuss what is involved with:

- Routines related to cooking, dinner, and cleaning up after cooking.
- Winding down from the day, and doing anything necessary to prepare for the next day, and
- Making sure that everything that needs to be done to put ones' mind at rest before bed, has been done.

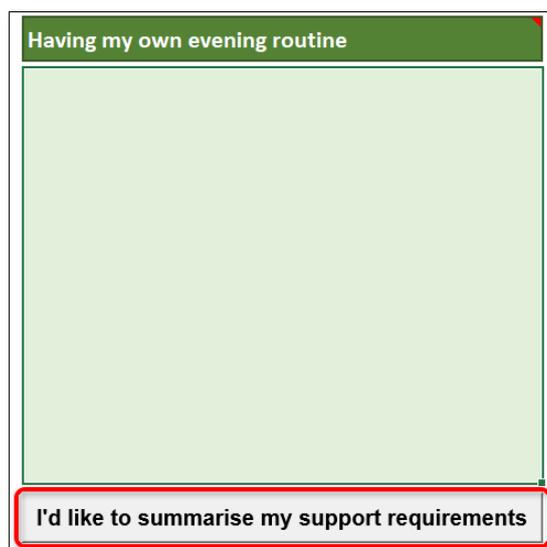
# Relationship to service specification

This domain is used to plan for, and estimate a level of support required to support the person...

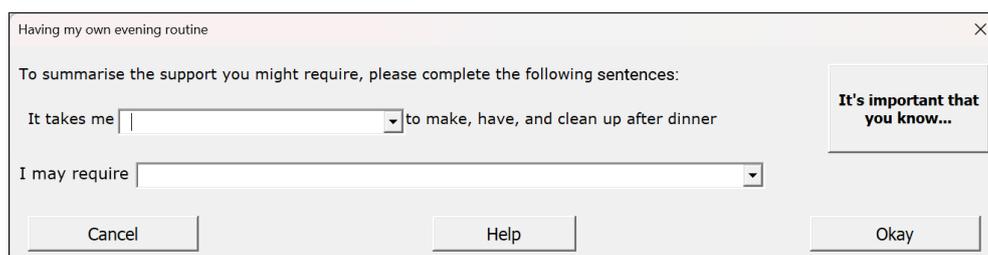
*“To take as much responsibility (including partial participation) as they can for domestic work such as laundry, cooking, cleaning in order to further independence.”*

## Pricing indicators

In **Plan View**, click on **I'd like to summarise my support requirements** under the **Having my own evening routines** planning box.



If you require additional advice to determine which support levels to select in the drop-down, click **Help** or the section on support indicators in this guide.



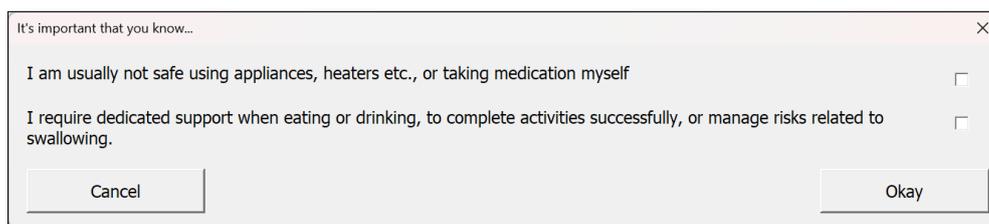
### **Having my own evening routine options in Plan View**



### **Having my own evening routine options in List View in the Specific Support Requirements section**

## It's important that you know...

This domain has two indicators attached to it.



A screenshot of a Windows-style dialog box. The title bar reads "It's important that you know...". Inside the dialog, there are two lines of text, each followed by a checkbox. The first line is "I am usually not safe using appliances, heaters etc., or taking medication myself" and the second is "I require dedicated support when eating or drinking, to complete activities successfully, or manage risks related to swallowing." At the bottom left is a "Cancel" button and at the bottom right is an "Okay" button.

These indicators are intended to identify more intensive requirements for using household items safely (including kitchen appliances), manage supports such as peg-feeding systems, and identifying and managing any particular risks involved with swallowing.

Specific requirements related to eating, drinking, and managing swallowing risks, may also be relevant to morning routines. It is recorded once (here) to avoid answering indicators repeatedly across domains.

## Domain - Settling in and feeling safe for the night

Feeling safe and secure at night is part of feeling comfortable at home. Ending the day well contributes to a good quality of life, and a sense of being at home.

You might discuss what's involved with:

- Completing pre-bed routines, including getting changed, brushing teeth etc.
- Getting into bed and settling in for the night, and
- Knowing how to resolve any issues that might arise through the night, and who is available to support with that.

## Relationship to service specification

This domain is also used to plan for, and estimate a level of support required to support the person...

*"To carry out activities of daily living and personal care as required, including using the toilet, dressing, bathing, hair washing, teeth cleaning, toe and fingernail care, eating and mobility. This includes supporting the Person's dignity of personal appearance appropriate to the place and conditions while maintaining choice."*

# Pricing indicators

In **Plan View**, click on **I'd like to summarise my support requirements** under the **Settling in and feeling safe for the night** planning box.



Settling in for the night, and managing myself through the night

To summarise the support you might require, please complete the following sentences:

1. *Settling in for the night*

My pre-bed routines take me

I may require

2. *Managing myself through the night*

I can

I may require

Cancel Help Okay

**It's important that you know...**

**Settling in and feeling safe for the night options in Plan View**

c.) *Settling in and feeling safe for the night*

My pre-bed routines take me

I may require

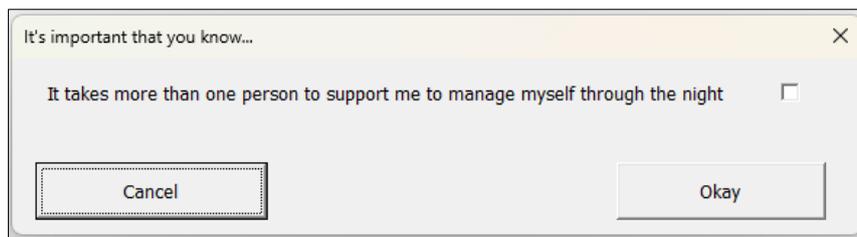
I can

I may require

**Settling in and feeling safe for the night options in List View in the Specific Support Requirements section**

## It's important that you know...

This domain has one indicator attached to it.



## Domain - Having my space and making a space mine

Part of home is having ones' own space, controlling what happens in that space, and taking responsibility for ones' own space.

You might discuss what's involved with:

- Having objects and other things that represent who you are in your personal space.
- Making choices about who does and does not enter personal spaces, when and on what basis, and
- Keeping personal space clean and tidy, to a standard that might be expected of any tenant or housemate.

This domain speaks heavily to *how* someone is supported, and the way the control of personal space can contribute to an experience of home.

In terms of *how much* support is required, there are some practical matters related to organising, keeping tidy and clean personal spaces that the disabled person may require support with.

### Relationship to service specification

This domain contributes to giving effect to the following requirements:

*"The home is accessible, homely, clean, well maintained and provides privacy and autonomy."*

*"To be involved as much as possible in making decisions about their life and the way they live on a daily basis."*

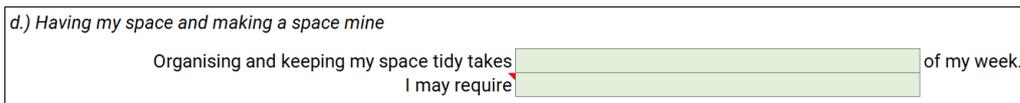
*"To take as much responsibility (including partial participation) as they can for domestic work such as laundry, cooking, cleaning in order to further independence."*

### Pricing indicators

In **Plan View**, click on **I'd like to summarise my support requirements** under the **Having my space and making a space mine** planning box.



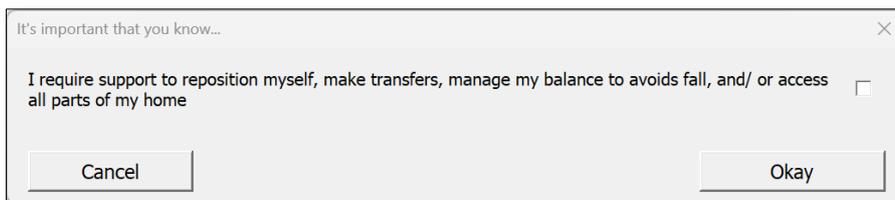
***Having my space and making a space mine options in Plan View***



***Having my space and making a space mine options in List View in the Specific Support Requirements section***

## It's important that you know...

This domain has one indicator attached to it.



# Domain - Being responsible for my home

Part of making somewhere our home is exercising some responsibility for how home works. All of us may, or have, asked for help to understand, and make decisions about those responsibilities at various times.

This domain involves planning *how* choice and control over home life and the living arrangement will be supported and realised for the disabled person. There are a number of practical elements of exercising rights and responsibilities in home life that may require support.

You might discuss what's involved with:

- paying bills and paying contributions to shared costs.
- contributing to shared tasks (cleaning communal areas, putting out the trash, etc).
- deciding, together, what happens in shared spaces at home.

## Relationship to service specification

This domain contributes to giving effect to the following requirements:

*"To be involved as much as possible in making decisions about their life and the way they live on a daily basis."*

*"To independently manage their finances as far as is possible (as outlined in clause 6.5)."*

*"The Person, their family/whānau/guardians/advocate (with the consent of the Person), will have opportunity for input into all aspects of the service (such as staffing, Personal Planning, and Governance)."*

*"b. Provide opportunity for the Person and their family/whānau/guardians/advocates to be involved in service operations and development as agreed with the Person. This should include:*

- *Input into policies and procedures*
- *Input into service planning and development*
- *Input into staff selection/appointment*
- *Involvement in internal quality monitoring*
- *Input and active participation in the ongoing development, review, and implementation of a Personal Plan*
- *Representation on an advisory group and opportunity for input at Governance level*
- *Involvement in planning, arranging, and managing activities such as social and recreational activities*

- Full access to this service specification to enable the service user and their family/whānau/guardian/advocate to fully understand the nature of the service.”

## Pricing indicators

In **Plan View**, click on **I'd like to summarise my support requirements** under the **Being responsible for my home** planning box.



Being responsible for my home

To summarise the support you might require, please complete the following sentences:

Contributing to shared household tasks might take me  a week.

I may require

I take  with tasks and decisionmaking to ensure I am able to make and express decisions in a way that works for me.

I may require  to engage with information and make myself understood.

It's important that you know...

Cancel Help Okay

### **Being responsible for my home options in Plan View**

e.) Being responsible for my home

Contributing to shared household tasks might take me  a week.

I may require

I take  with tasks and decisionmaking to ensure I am able to make and express decisions in a way that works for me.

I may require  to engage with information and make myself understood.

### **Being responsible for my home options in List View in the Specific Support Requirements section**

If you are unsure what time rating to apply:

- **no additional time** – will mean no support, on top of the time and engagement that otherwise might be part of making decisions in the house.

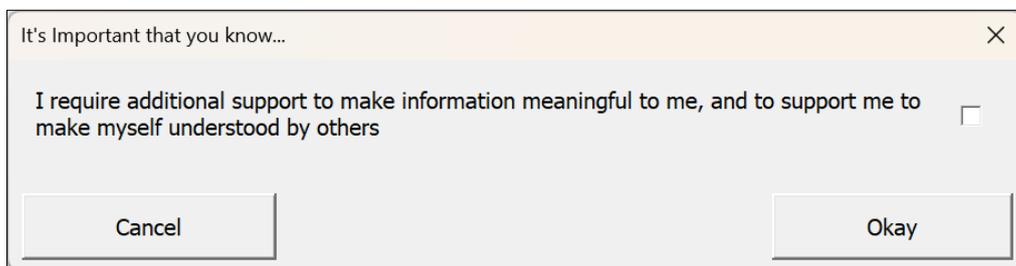
- **a little additional time** – means about 10 minutes in a usual week, on top of the time and engagement that otherwise might be part of making decisions in the house.
- **some additional time** – means about 20 minutes in a usual week, on top of the time and engagement that otherwise might be part of making decisions in the house.
- **significant additional time** – means about 30 minutes in a usual week, on top of the time and engagement that otherwise might be part of making decisions in the house.

If you are unsure what support rating to apply:

- **no disability support** – will mean no support, on top of the time and engagement that otherwise might be part of making decisions in the house.
- **someone being available to answer questions** – might also be able to answer questions for two other people, over that same period of time.
- **someone to work through and explain things to me** – might also be available to explain things with another person who also requires support, at the same time.
- **someone who can sign or otherwise interpret for me** – would be almost exclusively available to the person, for the period that they are working through the decision.
- **someone who knows me very well** - would also be almost exclusively available to the person, for the period that they are working through the decision.

## It's important that you know...

This domain has one indicator attached to it.



It's Important that you know... X

I require additional support to make information meaningful to me, and to support me to make myself understood by others

Cancel Okay

# Domain - Maintaining connection and pursuing my interests

Home is a place where we can be ourselves. This includes being able to:

- do things in a way that works for us.
- do things we enjoy, away from being on display to others.
- inviting others in and sharing the way we go about home life with them.

At a practical level, you might discuss what's involved with:

- what interests the person has
- what needs to occur at home for the person to be able to pursue them
- how the person spends their day
- the person hosting others in their home, and
- using technology to stay in touch with others.

## Relationship to service specification

This domain contributes to giving effect to:

*“People will be actively supported to integrate into their community and to be involved with friends, partners and family, in accordance with their choice and personal goals.”*

## Pricing indicators

In **Plan View**, click on **I'd like to summarise my support requirements** under the **Maintaining connection and pursuing my interest** planning box.



Maintaining Connection and Sharing Connection

To summarise the support you might require, please complete the following sentences:

I will usually [dropdown] to maintain connection with others outside my home.

I may require [dropdown]

I may require [dropdown] to safely and effectively use technology to engage with or keep up with others.

Whilst I am at home, I may require [dropdown] involved in pursuing my interests, or unwinding from the day/week.

I like to invite others to come to my home [dropdown]

I may require [dropdown] to successfully undertake hosting others in my home.

Buttons: Cancel, Help, Okay

Callout: It's important that you know...

**Maintaining Connection and Sharing Connection options in Plan View**

f.) Maintaining connection and pursuing my interests

I usually [dropdown] to maintain connection with others outside my home.

I may require [dropdown]

I may require [dropdown] to safely and effectively use technology to engage with or keep up with others.

I may require [dropdown] to pursue my interests, or unwind from the day/week.

**Maintaining Connection and pursuing my interests options in List View in the Specific Support Requirements section**

## Rating some specific situations

If the person you are doing the BAT with is still in school, you can reflect this by selecting - “go out 3-5 days a week.”

You may select a higher rating if that is appropriate for how the person spends their weekends as well.

When making ratings, you needn’t distinguish between outings or activities that are currently supported by group home staff and outings or activities that are funded through other services – the BAT is capturing what this level of activity is. The price implications are managed by assumptions in the GPT, discussed below.

## How this set of indicators effects price

The Global Pricing Tool generally treats activities through the day as requiring only residual support from group home staff (such as for when people are sick etc.), recognising that Day Programmes and Vocational Programmes are allocated through a different service line, or funded by MSD respectively.

The questions in this domain help us to build a greater understanding of how the person spends their day, and how they are best supported to do that.

If the person is not attending Day Programmes or other activities outside the

house for reasons related to risk, an exceptional rate may be signalled in **List View**.

*Is the package sought likely to be within a banded rate* **No**

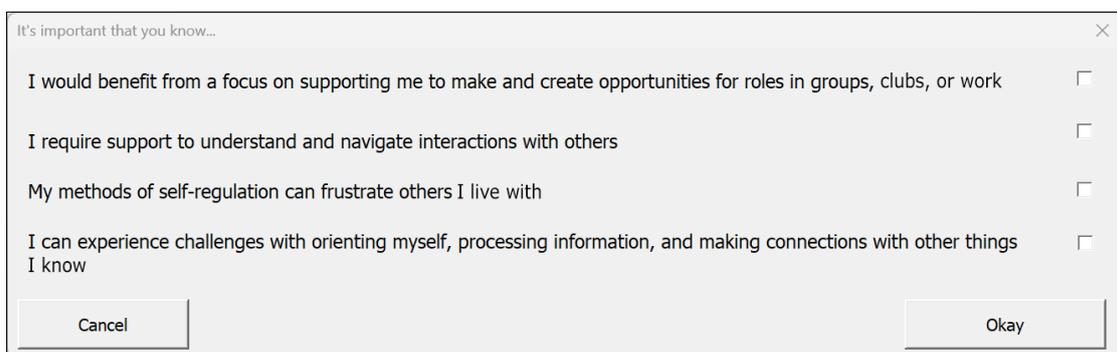
**List View** indicates if the package of supports being sought is likely to be within a banded rate

However, this would arise as a result of the way you answer questions in the **Feeling safe and being safe** and **Doing things that keep me well** domains.

Information captured in these domains will also inform how that support is delivered.

## It's important that you know...

This domain has four indicators attached to it.



It's important that you know...

- I would benefit from a focus on supporting me to make and create opportunities for roles in groups, clubs, or work
- I require support to understand and navigate interactions with others
- My methods of self-regulation can frustrate others I live with
- I can experience challenges with orienting myself, processing information, and making connections with other things I know

Cancel Okay

## Domain - Doing things that keep me well

Home life may involve doing things that keep us well, and when we are unwell home is often where we go or stay to try and get well.

You might discuss what's involved with:

- Taking medication on time and making sure it is the right medication.
- Keeping up with therapy, or with exercise that maintains my wellbeing.
- Checking in on my health, making and attending healthcare appointments; and
- Managing acute medical events (seizure, aspiration risks etc.).

# Relationship to service specification

This domain contributes to giving effect to the following requirements:

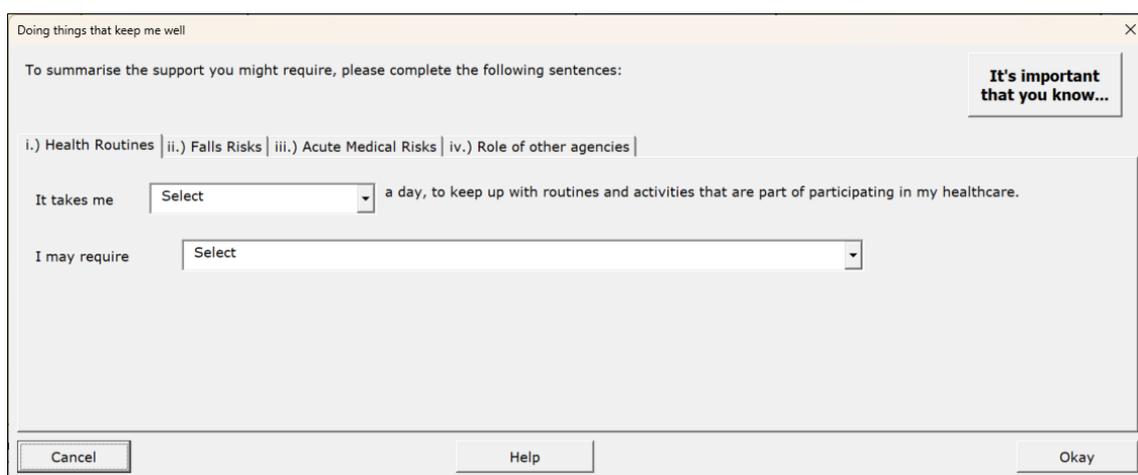
*“To have good emotional and physical health.”*

*“To maintain or improve communication, behaviour, mobility, continence, responsibility and activities of daily living.”*

*“To implement best practice interventions and rehabilitation strategies.”*

## Pricing indicators

In **Plan View**, click on **I'd like to summarise my support requirements** under the **Doing things that keep me well** planning box.

A screenshot of a summary form titled "Doing things that keep me well". The form contains the following elements:

- A close button (X) in the top right corner.
- Text: "To summarise the support you might require, please complete the following sentences:"
- A box on the right side containing the text: "It's important that you know..."
- Navigation tabs: "i.) Health Routines | ii.) Falls Risks | iii.) Acute Medical Risks | iv.) Role of other agencies |".
- Text: "It takes me" followed by a dropdown menu with "Select" and "a day, to keep up with routines and activities that are part of participating in my healthcare."
- Text: "I may require" followed by a dropdown menu with "Select".
- Buttons at the bottom: "Cancel", "Help", and "Okay".

Doing things that keep me well

To summarise the support you might require, please complete the following sentences:

**It's important that you know...**

i.) Health Routines | **ii.) Falls Risks** | iii.) Acute Medical Risks | iv.) Role of other agencies

Without appropriate support...

I may struggle to manage my balance, or be at risk of falls

These events occur

I may require  to support me to be safe.

Cancel Help Okay

Doing things that keep me well

To summarise the support you might require, please complete the following sentences:

**It's important that you know...**

i.) Health Routines | ii.) Falls Risks | **iii.) Acute Medical Risks** | iv.) Role of other agencies

Without appropriate support...

I can experience acute medical events (eg. seizure, aspiration risk etc.) at least

These events occur

I may require  to support me to be safe.

Cancel Help Okay

Doing things that keep me well

To summarise the support you might require, please complete the following sentences:

**It's important that you know...**

i.) Health Routines | ii.) Falls Risks | iii.) Acute Medical Risks | **iv.) Role of other agencies**

Other agencies will play a role in supporting me to feel and be safe, or manage challenges day to day, including:

Community mental health services  ACC  
 Mental health NASC  Oranga Tamariki  
 Long term health conditions NASC

We expect that to impact on the support required by:

Cancel Help Okay

The four tabs for **Doing things that keep me well** options in **Plan View**

g.) *Doing things that keep me well*

It takes me \_\_\_\_\_ a day, to keep up with routines and activities that are part of participating in my healthcare.

I may require \_\_\_\_\_

I may struggle to manage my balance, or be at risk of falls  
These events occur \_\_\_\_\_  
I may require \_\_\_\_\_ to support me to be safe.

I can experience acute medical events (eg. seizure, aspiration risk etc.) at least \_\_\_\_\_  
These events occur \_\_\_\_\_  
I may require \_\_\_\_\_ to support me to be safe.

***Doing things that keep me well*** options in **List View** in the **Specific Support Requirements** section

## It's important that you know...

This domain has one attached to it.

It's important that you know... ✕

Understanding and managing my mood and outlook affects the best way to support me

Cancel Okay

## Domain - Enjoying my privacy

Privacy is part of enjoying being at home, and a lack of privacy can sometimes be a trigger for behaviour others find challenging.

Whilst privacy might be a general expectation we would have of the service, planning for private moments, or periods with lower contact with staff may involve:

- structuring activities in a way that create the opportunity for private time, and
- a structured approach to managing risk whilst the person is alone, to avoid intrusion into that privacy.

You might discuss:

- what times are privacy most important to the person?
- what needs to be in place for privacy to be available safely?

## Relationship to service specification

This domain contributes to giving effect to the following requirements:

*“The home is accessible, homely, clean, well maintained and provides privacy and autonomy.”*

## Pricing indicators

In **Plan View**, click on **I'd like to summarise my support requirements** under the **Enjoying my privacy** planning box.



### ***Enjoying my privacy options in Plan View***

### ***Enjoying my privacy options in List View in the Specific Support Requirements section***

The privacy indicator does not make an adjustment to price. Instead, it provides information about the relative balance of lower contact time proposed across the plan, and the level of lower contact time the person has indicated they might require.

Where there is less lower-contact time planned for than the person has indicated might be required, we anticipate that this would prompt discussion on the strategies that can be put in place to safely provide that lower contact. This is important, so that the level of support, of itself, does not exacerbate any underlying risks or pose a further risk to the disabled person's wellbeing.

If you are unsure what rating to apply:

- **no time to myself** – means that the person does not require any time alone to maintain a sense of balance and wellbeing or manage sensory overload.
- **occasional short breaks alone** – means the person requires up to one hour a day to maintain a sense of balance and wellbeing or manage sensory overload.
- **regular time alone each day** - means the person requires up to 2 hours a day to maintain a sense of balance and wellbeing or manage sensory overload.
- **extended periods of alone time daily** - means the person requires up to 3 and a half hours a day to maintain a sense of balance and wellbeing or manage sensory overload.
- **significant and consistent time alone throughout the day** - means the person requires up to 4 and a half hours a day to maintain a sense of balance and wellbeing or manage sensory overload.

## Domain - Feeling safe and being safe, day-to-day

Home should be somewhere that we feel safe and are safe. Effective and proportionate risk management is part of delivering quality care.

You might discuss what's involved with:

- The things that need to be in place for me to manage ordinary hazards in the home
- Managing contact with strangers safely.
- Expressing myself in a way that is safe for me and for others; and
- Managing emergency situations

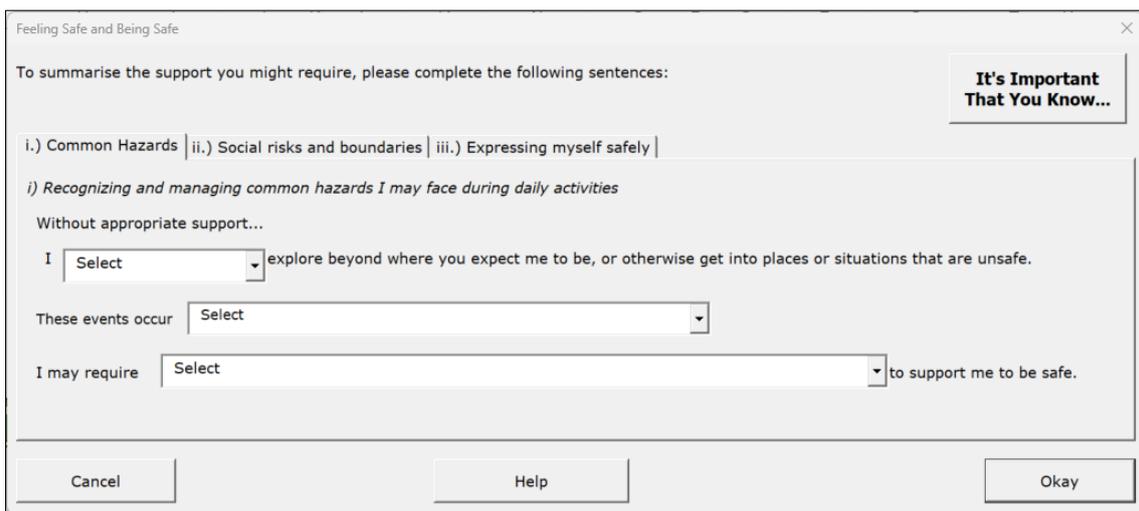
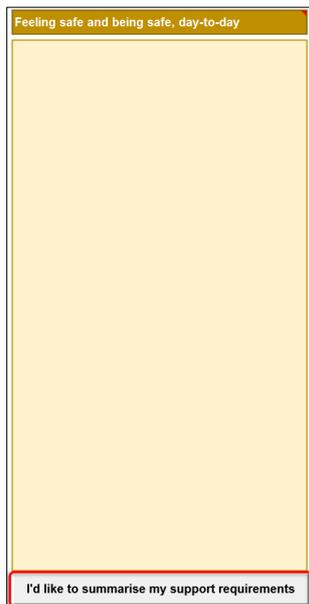
## Relationship to service specification

This domain contributes to giving effect to the following requirement:

*“People will live in an environment that safeguards them from abuse and neglect and ensures their personal security and safety needs are met.”*

# Pricing indicators

In **Plan View**, click on **I'd like to summarise my support requirements** under the **Feeling safe and being safe, day-to-day** planning box.



Feeling Safe and Being Safe

To summarise the support you might require, please complete the following sentences:

**It's Important That You Know...**

i.) Common Hazards | ii.) Social risks and boundaries | iii.) Expressing myself safely

ii.) Requiring support to recognise and manage everyday social risks and challenges

Without appropriate support...

I  require support to understand the intentions of others and to understand and make choices about friendships, relationships, and boundaries.

These events occur

I may require  to support me to be safe.

Cancel Help Okay

Feeling Safe and Being Safe

To summarise the support you might require, please complete the following sentences:

**It's Important That You Know...**

i.) Common Hazards | ii.) Social risks and boundaries | iii.) Expressing myself safely

iii.) Expressing myself in a way that is safe for me and for others

Without appropriate support...

The way I express my emotions  is in a way that is safe for me and for others.

These events occur

I may require

The way I manage my emotions or interact with others

Cancel Help Okay

The three tabs for **Feeling safe and Being safe** options in **Plan View**

i.) Feeling safe and being safe, day-to-day

I  explore beyond where you expect me to be, or otherwise get into places or situations that are unsafe.

These events occur

I may require  to support me to be safe.

I  require support to understand the intentions of others and to understand and make choices about friendships, relationships, and boundaries.

These events occur

I may require  to support me to be safe.

The way I express my emotions is  in a way that is safe for me and for others.

These events occur

I may require  to support me to be safe.

The way I manage my emotions or interact with others

**Feeling safe and being safe, day-to-day** options in **List View** in the **Specific Support Requirements** section

## It's important that you know...

This domain has four indicators attached to it.

It's important that you know... ×

I like to explore my environment, and may wander beyond where you expect me

Frequent seizure activity or aspiration risk put me at imminent risk of serious harm

The way I express my emotions frequently can place myself or others at imminent risk of serious harm

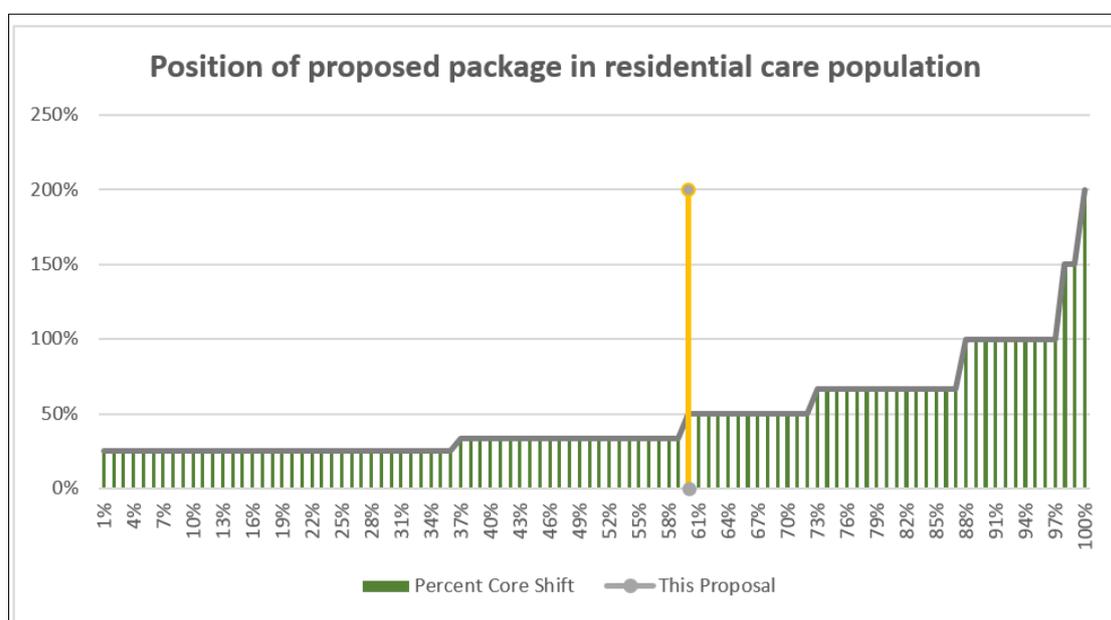
The way I express my emotions frequently can cause significant property damage

# Using the BAT tool with the GPT and Socrates

## List View – Summary

### Position of proposed package in residential care population

Upon the completion of a Band Allocation Tool assessment for an individual, the individual will be plotted against the 6 bands of the Residential Care Pricing Model that represent a care package (or at an extraordinary band if outside the 6) based on the information provided.

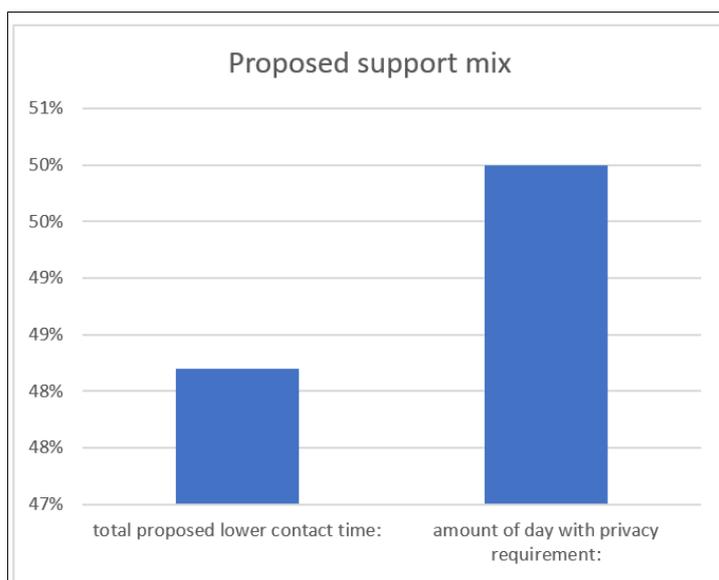


An example of the proposed package graph in the **List View – Summary** section

This graph presents the proposed package of the individual, in the context of the wider residential care population. For example, if you are at 61% on the graph, it means that the person is broadly around the 61<sup>st</sup> percentile in the population before the Global Pricing Tool was rolled in.

### Proposed support mix

This graph presents the proposed support mix between time for contact and time for privacy for an individual, based on the information inputted during the completion of the of a Band Allocation Tool.



An example of the proposed support mix in the **List View – Summary** section

By comparing the two bars, you can see whether the planned level of support provides more or less the amount of lower contact time that the disabled person has indicated is good for them.

**This graph is informative only** – no automatic adjustment is made in the tool to support the amounts. If proposed lower contact time is less than the amount of lower contact time sought by the person, you might discuss with the provider what strategies they would use to ensure the disabled person gets the space they need to self-regulate.

## Person’s details

The summary section will display the details of the person that you entered in either Plan View or here in List View.

Person’s details	
First Name	Peter
Last Name	Doe
DOB	1/01/2001
NHI	XXX123
Date this plan completed	11/05/2025

An example of **Person’s details** in the **List View – Summary** section

## Inputs for GPT

This table contains the information that you will need to copy into the GPT (which you access in Socrates) to determine the band allocation.

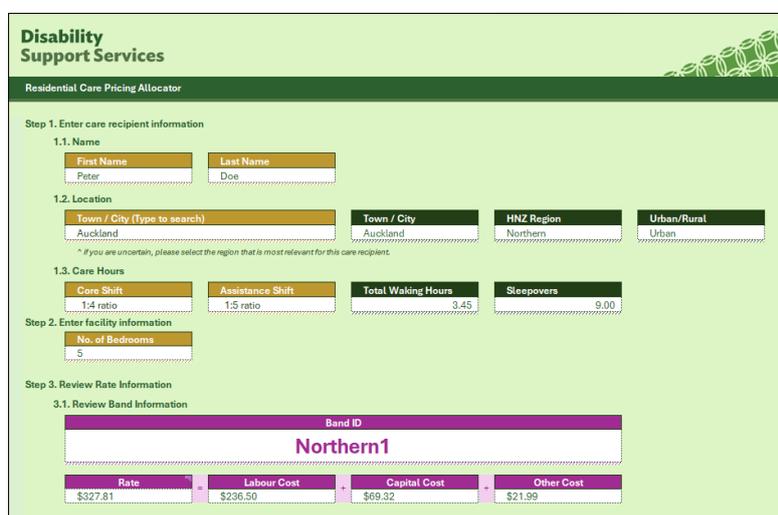
Inputs for GPT	
Town/City	Auckland
Capacity	5
Sleepover room	1
Sleepovers	1
Transportation	1
Core Shift (Care Ratio)	1:4 ratio
Assistance Shift (Care Ratio)	1:5 ratio

An example of **Inputs for GPT** in the **List View – Summary** section

For information on how to access the GPT, please see - <https://www.disabilitysupport.govt.nz/training-and-support/how-to-access-bat-and-gpt>

**Even when the BAT indicates that the package sought is not likely to be within a banded rate, you should confirm this by entering the information into the GPT.**

It is important that you compare your entries in the GPT with what you see in the BAT to make sure you have entered the correct information.



An example of the banding result in GPT when **Inputs for GPT** are copied across from BAT

## Recording the funding allocation into Socrates

All individual funding allocations must first be discussed and agreed with the Provider to ensure the Provider has the capability to support the person in a CGH service.

Once the allocation is agreed, the NASC organisation or EGL site must enter a service allocation under Service Coordination in Socrates, ensuring that:

- the service ID corresponds to the person's region, and GPT output,
- the correct provider region is selected,

- the BAT rationale is copied and pasted.

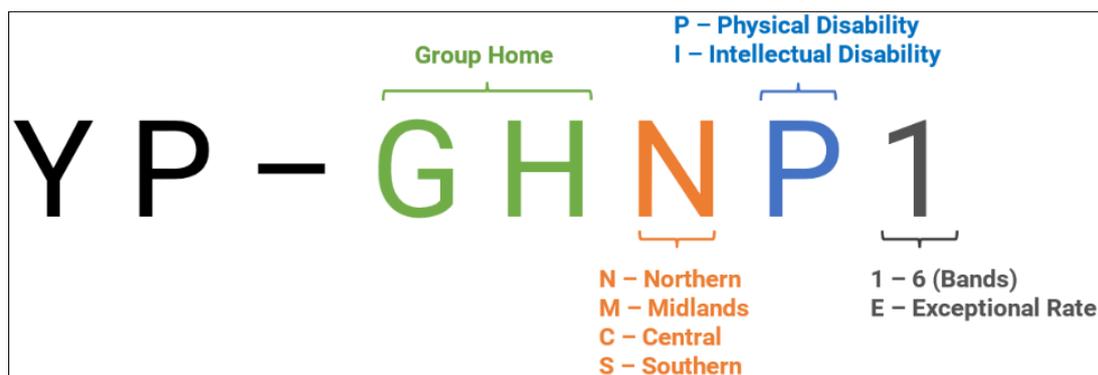
In client documents the following are saved:

- the completed BAT and GPT files,
- the rationale for the allocated funding rate, including peer review, Quality Assurance and Review Panel outcomes.

## Data entry and the Data String for Socrates

Once you know which band the client will be on and the provider, you can then allocate the service in Socrates, choosing the appropriate Service ID based on the band allocation information.

- Select the correct Provider and region, and Service ID.



Choose the appropriate **Service ID** carefully, to ensure it reflects the correct band. In the example above, "GH" refers to Group Home. "N" refers to the region (Northern, Midlands, Central, Southern). "P" or "I" refers to the disability, and then "1" relates to the band.

There are 56 potential Service IDs, so it is important to select the correct one aligned with the BAT Output and Client. The Service ID includes information on the Group Home, region, disability, and the allocated band.

If you select an Exceptional Rate **Service ID**, additional fields will appear to be completed. Note that you must have received endorsement for the exceptional rate from the DSS Review Panel before you do this.



**DSS Service**
**Banded Rate Approach**

Primary Selection  
 Provider    Service

Provider: Provider – Region/Address \*  
Service: YP – GHNP1 \*  
Unit of Service: DAYS  
Service Rate: \$0.00  
Service Quantity:   \*  
Service Frequency: Daily \*  
Service Start Date:   \*  
Service Review Date:   \*

Average Weekly Cost:  
Total Cost:  
Annualised Cost:  
Service Goals:

BAT Rationale:

Service Notes:

The **BAT Rationale** field in Socrates is where the **Data string for Socrates** is copied into

## Disabled person’s address updating

You will need to return to Socrates, to update the disabled person’s address when the Service Provider has confirmed the Service Request. This is important to maintain, as it will be used for new reporting.