Introduction to Residential Pricing changes
Session 4 – Additional Information

Facilitator Guide - November 2025

This session is Part 4 of a 4-part series:

- Session 1 – Setting the Scene
- Session 2 – Introducing BAT
- Session 3 – BAT in action
- Session 4 – Additional Information

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Facilitator Notes

The four sessions can be delivered as one or in separate sessions to allow for discussion and reflection on the material.

Delivered as separate sessions			
Session 1 Setting the Scene	Session 2 Introducing BAT	Session 3 BAT in action	Session 4 Additional Information
Delivered as two sessions			
Session 1 - Setting the Scene Session 2 - Introducing BAT		Session 3 - BAT in action Session 4 - Additional Information	
Delivered as one session			
Session 1 - Setting the Scene Session 2 - Introducing BAT		Session 3 - BAT in action Session 4 - Additional Information	

A summary of each of the sessions is as follows:

Session 1 - Setting the Scene	- Introductory session, designed to give background related to changes that have occurred and are occurring in relation to DSS, including the findings and recommendations of the Independent Review.
Session 2 - Introducing BAT	- Background related to the Band Allocation Tool, including why and how it was developed and tested. Guidelines are provided on how to access, as well as explaining where the BAT fits in with other tools and processes.
Session 3 - BAT in action	- A hands-on demonstration of the BAT tool using an exemplar scenario for demonstrating best practice, exploring the layout (Purpose, Plan View and List View) and functionality (Help, text boxes etc). The session includes explaining how to access the tool, using information from the BAT in Socrates, and how to ultimately determine the appropriate band.
Session 4 - Additional Information	- The final session discusses the process related to dealing with exceptional rates. It provides information on how to access training and support material, as well as describing what resources are available to support the use of the BAT and GPT tools.

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Introduction

Introduction to Residential Pricing changes - Session 4 – Additional Information is the final session, where we will discuss the process related to dealing with exceptional rates. It provides information on how to access training and support material, as well as describing what resources are available to support the use of the BAT and GPT tools. It concludes with information on what is on the radar in terms of future work and developments.

Audience

All end users of the BAT. This will be predominantly NASC Service Assessors and Service Coordinators across the NASC network as well as Budget Advisors within Mana Whaikaha (Midlands).

Duration

42 minutes.

Learning Outcomes

By the end of the session, learners will be able to understand:

- The funding allocation process
- The processes related to dealing with exceptional rates calculations
- How to access training and support material
- What training and support material is available
- Additional work and development that is going to occur over the next few months

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Agenda

DURATION	TOPIC
5 mins	Welcome and objectives
4 mins	Recap – The funding allocation process
8 mins	Exceptional rates
10 mins	Training and support material
5 mins	What's next for you?
10 mins	Wrap-up/Q&A
42 mins	**Total**

Training collateral for this session

- Facilitator Guide (PDF)
- PowerPoint Presentation (PPTX)

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Facilitator prompts

- **DO**: An instruction to the Facilitator about something they need to do (e.g., **DO:** Display slide 1).
- **SAY**: The script for the Facilitator.
- **ASK**: A prompt to the Facilitator to ask a question and get responses from participants.
- **CLICK+SAY**: An indication that the Facilitator needs to click the slide to have something appear/occur before reading the next part of the script. For example, you may be prompted to **CLICK+SAY** as parts of an animation are revealed on a slide.
- **Facilitator Note:** A note specifically for the Facilitator that may be a suggestion, guidance, warning etc.
  (e.g., **Facilitator Note:** Welcome people as they come online to the session and ask them to put their mic on mute.)

Note - Text contained in the Notes section of PowerPoint slides, such as "[IMAGE CREDIT Photo by Marissa Grootes on Unsplash]" is there to simply credit the image used and does not need to be mentioned in the presentation.

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Welcome and Objectives

Purpose – This first section introduces the topic and the learning objectives. It also gives an overview of what learners will be doing in the session.

<div style="border: 2px solid red; color: #a03030; text-align: center; font-weight: bold;">
IF THIS SESSION IS BEING DELIVERED ONLINE AND YOU INTEND TO RECORD IT, YOU SHOULD START RECORDING NOW. MAKE SURE TO INFORM PEOPLE AND GIVE THEM THE OPTION TO DECIDE IF THEY WANT TO TURN THEIR CAMERAS ON.
</div>

(5 minutes)	**Welcome and objectives**	If the session is not being delivered online, adjust some of the instructions you use.
	2. **DO**: Display slide 1	
	3. **DO**: Welcome everyone as they join the session. Instruct them to put themselves on mute if they are joining a virtual training session.	
	Facilitator Note: You could insert a waiting activity of your choice as you wait for people to come online.	
	4. **DO**: Start the session and introduce yourself. You may wish to start with a karakia.	
	5. **ASK**: If they are all ready to begin by using the 'Thumbs-up.'	
	What we will cover	
	6. **DO**: Display slide 2	

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7. **SAY**: In this the final session, we will be discussing exceptional rates, looking at the training and support material available to you, as well as what is on the radar for the future.

8. **DO**: Display slide 3

9. **SAY**: We are going to look at:

   - A reminder of the funding allocation process
   - The processes related to dealing with exceptional rates.
   - How to access training and support material, as well as describing the resources that are available to support your use of the BAT and GPT tools.
   - What is suggested you do next to get familiar with BAT and GPT

Learning Goals

10. **DO**: Display slide 4

11. **SAY**: At the end of this session, you will be able to understand:

    - The funding allocation process
    - The process related to dealing with exceptional rates calculations.
    - How to access training and support material
   - What training and support material is available

Recap – The funding allocation process

Purpose – This section recaps the funding allocation process and reminds us where the BAT and GPT tools fit into the process.

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(4 minutes)

1. **DO**: Display slide 5

2. **SAY**: In an earlier session, I introduced a simplified overview of the end-to-end process for funding allocation. Let's recap the process before we look at how to deal with exceptional rates.
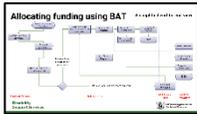
3. **DO**: Display slide 6

4. **SAY**: A needs assessment has been completed for the disabled person and the disabled person is suitable for Community Residential Support Services (CRSS).

   You discuss provider options with the disabled person and their whānau.

5. **CLICK+SAY**: You then contact providers to confirm available facilities.

6. **CLICK+SAY**: You then enter information into the BAT and then use the GPT to calculate the rate. This will inform you whether a standard banded rate applies or if an exceptional rate needs to be calculated and endorsed.

   NASC organisations or EGL sites must also complete an internal review to ensure the person's details have been correctly captured in the BAT and ensure the GPT output is appropriately based on the person's support needs.

7. **CLICK+SAY**: Cabinet requires a review of above band exceptional rates. DSS is finalising policy on what other CGH decisions need to be referred to the Review Panel and those that don't.

8. **CLICK+SAY**: Where an endorsement of the rate is required, a NASC Manager or EGL Director/Lead must complete a "Disability Support Services Review Panel Application Form" and submit it to DSS Assurance for consideration.

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9. **CLICK+SAY**: When endorsed by the Review Panel (as well as for those that don't require endorsement) you then choose the provider, region and Service ID in Socrates.

10. **CLICK+SAY**: You then document the rational in Socrates, then generate and send a Service Request to selected Service Provider. They then accept and confirm the Service Request.

11. **CLICK+SAY**: This allows you to then finalise Service Coordination.

12. **CLICK+SAY**: You then generate a Service Authorisation.

13. **CLICK+SAY**: The Service Provider then receives the Service Authorisation and can begin to deliver the agreed services for the disabled person.

14. **CLICK+SAY**: You should also update an individual's address in Socrates. This is important to maintain, as it will be used for new reporting.

Exceptional Rates

Purpose – This section explains what the process is for dealing with exceptional rates and how exceptional rates will be reviewed and endorsed or declined.

(8 minutes)

Exceptional Rates

1. **DO**: Display slide 7

2. **SAY**: There will be instances when the information you feed into the GPT indicates that the level of funding required sits above or below the standard bands or is dual funded. This is referred to as an exceptional rate.

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The following information explains the processes concerning how to deal with an exceptional rate and how they are reviewed.
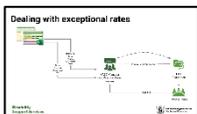
3. **DO**: Display slide 8

4. **SAY**: I'm going to show you this process as a diagram first, and then I'll step you through the information again.

5. **CLICK+SAY**: When information from the BAT is entered into the GPT, it will match the funding rate to the person's needs.

6. **CLICK+SAY:**

   - If the person's funding falls above or below the standard bands. This is considered an exceptional rate.
   - If the person's funding involves dual funding from DSS and one or more external agencies. This is also considered an exceptional rate.

7. **CLICK+SAY:** In both instances, a review with a NASC Manager or EGL Director/Lead Connector should be completed.

8. **CLICK+SAY:** The NASC Manager or EGL Director/Lead must then complete a Review Panel Application form and submit it to DSS Assurance to undergo DSS's Quality Assurance and Review Panel process.

9. **CLICK+SAY:** Assurance reviews the application and triages it for Panel consideration. Urgent applications will be dealt with differently. Assurance will inform the NASC or EGL if information is outstanding, and the application will remain 'on-hold' until such information is provided.

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10. **CLICK+SAY**: The Panel review the application and the NASC Manager or EGL Director/Senior Connector will be informed of the outcome.

If endorsed, the exceptional rate or band is confirmed, with notes and conditions outlined.

If the exceptional rate or band is not endorsed, the NASC Manager or EGL Lead/Director will be informed of the outcome with reasons citing the non-endorsement.

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11. **DO**: Display slide 9

12. **SAY**: Let's step through the process again.

When information from the BAT is entered into the GPT, it will match the funding rate to the person's needs.

13. **CLICK+SAY**: If the person's funding falls above or below the standard bands, or their funding involves dual funding from DSS and one or more external agencies, these are considered an exceptional rate. A review with a NASC Manager or EGL Director/Lead Connector should be completed.

14. **CLICK+SAY:** The NASC Manager or EGL Director/Lead must then complete a Review Panel Application form for the exceptional rate and submit it to DSS Assurance to undergo DSS's Quality Assurance and Review Panel process.

15. **CLICK+SAY:** Assurance reviews the application and triages it for Panel consideration. Urgent applications will be dealt with differently. Assurance will inform the NASC or EGL if information is outstanding, the application will remain 'on-hold' until such time as the information is provided.

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16. **CLICK+SAY**: The Panel review the application and the NASC Manager or EGL Director/Senior Connector will be informed of the outcome.

17. **CLICK+SAY**: If endorsed, the exceptional rate or band is confirmed, with notes and conditions outlined.

18. **CLICK+SAY**: If the exceptional rate or band is not endorsed, the NASC Manager or EGL Lead/Director will be informed of the outcome with reasons citing the non-endorsement.

Facilitator Note: You could take a moment to answer any questions related to this topic, if time allows.

Training and support material

Purpose – This section explains how to access the training and support material related to the use of BAT and the GPT.

(10 minutes)

1. **DO**: Display slide 10

2. **SAY**: I'm going to spend a few minutes now explaining where training material for BAT and GPT are located in relation to the changes in Residential Pricing.

3. **DO**: Display slide 11

4. **SAY**: There are two locations that have training and support material available to you:

- A hidden page on the DSS website, which you can find if you know the URL. That address is https://www.disabilitysupport.govt.nz/training-and-support. We're going to look at that page in a

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moment.

I need to emphasise that the page has been established for the benefit of NASCs and EGL sites, to facilitate training and use of the BAT and GPT tools. Please **do not** circulate the link to others outside of these organisations.

- An area in Socrates (which is where you also go to access the BAT and GPT tools), where we have put BAT Exemplar files to support self-paced learning activities you can complete. The reason the files are in Socrates is because BAT files are not intended for circulation, so they need to be in a secure location.

5. **SAY**: A handy tip - If you only want to remember one thing, remember and bookmark the hidden page of the DSS website. I'll show you why in a moment.

6. **SAY:** An existing DSS email inbox has been repurposed as a support email for BAT and GPT questions. The email address is DSS_submissions@msd.govt.nz **PLEASE NOTE THE UNDERSCORE IN THE EMAIL ADDRESS** where you can send in questions if you and your colleagues have something that you would like to ask.

7. **DO**: Display slide 12

8. **SAY**: I would encourage you to always consider the hidden page as the 'once source of truth.' Try to access the page on a regular basis in case some of the support material has been updated. Having printed versions of the User Guide or storing files elsewhere, creates a risk that you may not be using the most accurate or up-to-date material.

Let's take a look at the hidden webpage now.

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9. **DO**: Go to https://www.disabilitysupport.govt.nz/training-and-support

    Facilitator Note: As you work through the following script, be sure to highlight what you are discussing on the DSS website. If any item states "Coming soon" please indicate that the document will be published shortly.

10. **SAY**: If you recall, I said that there were two locations to access training material, but that if you wanted to remember just one location, then you should remember this hidden page. That's because information on how to access the other files that you need in Socrates can be accessed from this page also.

    Facilitator Note: Show the link to the page that tells people how to access the BAT and GPT tools.

11. **SAY**: At the top of this page are BAT User Resources for you. There are:

    - The BAT User Guide – This is a comprehensive PDF that goes into detail concerning how to use the BAT tool. On a day-to-day basis, this is likely the item that you will use the most for help and guidance.
    - Next, Cheat Sheets and FAQs – The Cheat Sheets are simple 'one pages' that give a very quick overview about how to perform a task, such as transferring information into Socrates from BAT and GPT.
    - Below these files, are four BAT Practice Scenarios. The files that you see there are scenarios that you can download, grab a copy of the BAT file and work through completing a BAT as though you are having a conversation with the disabled person. I want to stress that the scenarios portrayed in these documents are about fictional people. They are not based on and do not intentionally reflect any known person. I'll talk about how to use these scenarios more in a moment.

12. **SAY**: Below that are the resources that I've been using in these training sessions – A Facilitator Guide and a PowerPoint for each session, as well as a PDF version of the PowerPoint, for each session. You are more than welcome to take a look at these.

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13. **DO**: Display slide 13

14. **SAY**: There are 4 self-paced learning scenarios that you can work through on your own time. All the information that you need to work through each BAT Practice Scenario is *in* the scenario document that you [Important] **download from the hidden page on the DSS website**.

15. **SAY**: The other items mentioned in it, that you need to use to complete each self-paced learning activity are:

   - A new BAT file - which you would open from Socrates and save to your computer.
   - A new GPT file – which you need to access from Socrates at the time that you need to determine the allocated banding rate.
   - An exemplar response to the scenario in Socrates - So you can review what a completed BAT for the scenario might look like. This allows you to compare the BAT that you created with the exemplar.

16. **DO**: Display slide 14

17. **SAY**: You access the exemplars for each of the scenarios [Important] in Socrates.

   - Log in to Socrates
   - Go to the **Help** menu and select **User Guide**

18. **CLICK+SAY**: On the page that loads, click on '**+**' next to the **Residential Pricing Model** folder.

   - In this folder are each of the exemplar files to open and save a copy of, for each of the self-paced learning scenarios. You can use these files to compare with the BAT that you create when working through each scenario.

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- Below this, you will see **BAT Training example.xlsm** but this is only needed for those intending to deliver training using the Facilitator Guides and PowerPoints.

19. **SAY:** Remember - Always go into Socrates and open the Facilities List or create a new BAT or GPT when you need to make use of them, to ensure that you are using the latest versions of the tools.

What's next for you?

Purpose – This section discusses the recommended approach for staff after this session, in order for them to become more familiar with BAT and GPT.

(5 minutes)

Facilitator Note: The following is the recommended approach for learning from this point on. You are welcome to add additional ideas that would be effective in supporting your colleagues to feel confident and competent in using BAT and GPT.

1. **DO**: Display slide 15

2. **SAY**: So where to for you, after this session? Here's what I suggest you do in order to become more familiar with BAT and GPT.

3. **DO**: Display slide 16

4. **SAY**: First, take a breather. Take time after this session to have think about what you have seen and learnt about the new tools, why they have been introduced and how they are going to help you in your role.

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5. **CLICK+SAY**: I suggest the next thing you do is download the BAT User Guide and have a good read through that. Don't worry if there are parts of it that you are confused by. As you become more familiar with BAT and GPT, the User Guide will begin to make more sense. And as you start to use the BAT tool in your day-to-day work, the BAT user Guide will become indispensable.

6. **CLICK+SAY**: Then you should download the BAT Practice Scenarios from the hidden training page on the DSS website and work through the scenarios and compare your results with the exemplar BAT files. This might be something that you could do with a colleague. If the band allocation results for you, do not match with the scenario results, perhaps spend some time discussing this with a colleague.

7. **CLICK+SAY**: DSS intend to arrange some virtual 'drop-in' sessions in the lead-in to 1 December, where they hope to provide additional support and answer any questions that you may have.

8. **CLICK+SAY**: You might feel more comfortable thinking about a disabled person that you have supported and using their situation as a scenario you could enter into a BAT file to determine the allocated band for them.

9. **CLICK+SAY**: By this stage you will have become very familiar with the BAT tool, so it' a good opportunity to re-read the BAT User Guide and look at any Cheat Sheets and FAQs on the hidden training and support page on the DSS website.

10. **CLICK+SAY**: If you're still not feeling confident at this stage, review some of the other material on the training and support page, such as the PDF versions of the presentations from each of the four sessions. And again, take some time to chat with colleagues about their experiences using the new tool.

    As you spend more time using the BAT and GPT tools, you'll feel more confident and become more familiar with how they function and the benefit they produce when using them.

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Wrap Up

Purpose – This section provides time for learners to ask final questions and to discuss the learning outcomes. It also encourages them to reflect on the most valuable take-outs from the session and identify what actions they can take.

(10 minutes)	**Wrap up**
	1. **DO**: Display slide 17
	Facilitator Note: As this is the final session of training, 10 minutes have been allocated for the wrap up, to respond to any final questions.
	2. **SAY**: We've reached the end of this final session. In this session, we discussed exceptional rates, looked at the training and support material available to you, as well as what is on the radar for the future.
	Learning goals
	3. **DO**: Display slide 18
	4. **SAY**: You should now be able to understand:
	• The funding allocation process
	• The process related to dealing with exceptional rate calculations.
	• How to access training and support material
	• What training and support material is available
	Questions

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5. **DO**: Display slide 19

6. **ASK**: Does anyone have any questions, concerns or comments they wish to make currently?

Facilitator Note: Take any questions from the participants and respond if you can. If you are unsure of the answers to any questions, indicate that you will note the question down and feed answers back later.

Thank you

7. **DO**: Display slide 20

Facilitator Note: It is now up to you to determine how to end this final session.

8. **SAY**: Thank you.

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