

# Disability Support Services

**Introduction to Residential Pricing changes**  
***BAT in action***



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***Nau mai, haere mai***

***Welcome***

**Disability  
Support Services**



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# What this session will cover

- How to access the Facilities List
- How to access the BAT tool
- The Purpose, Plan View and List View tabs
- Entering and sharing information (using a scenario example) in Plan View
- Entering and sharing information in List View
- Entering information into GPT and Socrates



# Learning Goals

- The reasons for using the BAT tool and GPT
- How to access the BAT tool, ready to enter information
- The Purpose, Plan View and List View tabs and when best to use each tab
- The ways in which you can enter information into and share information in the BAT
- What information in the BAT needs to be transposed into the GPT tool and Socrates



# Conversations with the disabled person and their whanau

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# Using BAT in conversations

- Through the service specification, disabled people are provided with a number of choices. The use of the BAT tool is intended to assist you to explore those choices.
- Not all of these choices will play a direct role in pricing the service.
- Planning is intended to make clear what the disabled person and their family are looking for, and what the provider is committing to.
- It's intended to support you to capture the information needed to price residential care packages appropriately.





# Using BAT in conversations

- Supports you to capture and summarise service needs, before that information is entered into GPT to generate a daily rate.
- BAT does not include pricing information. Instead, it captures:
  - The location, size and support arrangements of the house a person will 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, and
    - overnight.



# Accessing the Facilities List

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Home

Home

<input type="checkbox"/>	Type	Name ^	Description
<input type="checkbox"/>		AAL	... Access Ability Taranaki
<input type="checkbox"/>		AAO	... Access Ability Otago / Southland
<input type="checkbox"/>		AAW	... Access Ability Wanganui
<input type="checkbox"/>		ALS	... AccessAbility LAC South
<input type="checkbox"/>		BHS	... Bay Home Support
<input type="checkbox"/>		CCS	... Capital Support
<input type="checkbox"/>		CCSR	... Capital Support RIDCA
<input type="checkbox"/>		Residential Pricing Model	...

**ALWAYS** open the  
**Facilities List on  
Socrates.**

**Do NOT** save a copy  
**and reuse it.**



# Accessing and saving a BAT tool copy

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# SOCRATES

NASC UAT INFORMATION SYSTEM

HOME ANNOUNCEMENTS CLIENTS CONTACTS ORGANISATION REPORTS HELP LOG OFF

## Task List

Change Password All Tasks All Additional Tasks Print Tasks

### Workflow Tasks

! You have no current workflow tasks. Hide 'Finalised Awaiting Export'  Search Tasks  Sort Tasks

### Additional Client Tasks

! You have no current additional tasks. Search Tasks  Sort Tasks





 **SOCRATES**  
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**Client Search**

NHI Number:  Date of Birth:    
Surname:  NASC:    
Given Name:  Preferred Name Only:   
Phone Number:

**Results**

Spell Check 





# SOCRATES

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## Maintain Client

Exit Services File Notes Tasks Status Review Events Save

Alerts File Notes Summary ESS Actuals

Alerts Others In Home

### Name

- Address
- DOB, Gender, CSC and Notes
- Ethnicity
- Language
- Comms. and Contacts
- Disability and Funder
- Resident Status
- Dependents and Carers
- ACC and Deinst
- Associated Clients
- Reports and Letters

### Client Identifier

Client ID:  
NASC:  
NHI Number:

### Client Name

Add New Name +

### Historical Client Names





# SOCRATES

## NASC UAT INFORMATION SYSTEM

HOME | ANNOUNCEMENTS | CLIENTS | CONTACTS | ORGANISATION | REPORTS | HELP | LOG OFF

**Maintain Client**

Exit Services | File Notes | Tasks | Status | Review | Events | Save

Alerts | File | Notes | Summary | ESS | Actuals

Alerts | Others In Home

Name  
Address  
DOB, Gender, CSC and Notes  
Ethnicity  
Language  
Comms. and Contacts  
Disability and Funder  
Resident Status  
Dependents and Carers  
ACC and Deinst  
Associated Clients  
Reports and Letters

**Client Reports**

- Client History Report
- Client Support Plan Summary Report
- Service Coordination and DSS Service Report

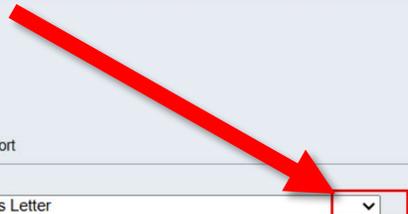
**Generate Letters**

Letter Type:  ▼

Generate Letter 

**Client Letters**

Delete	Description	Created On	Type



**SOCRATES**  
NASC UAT INFORMATION SYSTEM

HOME ANNOUNCEMENTS CLIENTS CONTACTS ORGANISATION REPORTS HELP LOG OFF

**Maintain Client** Exit Services File Notes Tasks Status Review Events Save

Alerts File Notes Summary ESS Actuals

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Reports and Letters

**Client Reports**

- Client History Report
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**Generate Letters**

Letter Type: Review Services Letter

- Review Services Letter
- NASC Review Form
- Aged Care Residential Entry Form
- Referral for Supported Living
- Explore Referral Form 2018
- BSS Request for ID Assessment
- Residential BAT \*
- Residential GPT \*

Delete	Description



**SOCRATES**  
NASC UAT INFORMATION SYSTEM

HOME ANNOUNCEMENTS CLIENTS CONTACTS ORGANISATION REPORTS HELP LOG OFF

**Maintain Client** [Exit Services] [File Notes] [Tasks] [Status] [Review] [Events] [Save]

[Alerts] [File] [Notes] [Summary] [ESS] [Actuals]

Alerts [!] Others In Home [Home]

Name  
Address  
DOB, Gender, CSC and Notes  
Ethnicity  
Language  
Comms. and Contacts  
Disability and Funder  
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Reports and Letters

**Client Reports**

- Client History Report
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**Generate Letters**

Letter Type:  [v]

[Generate Letter]

Delete	Description	Created On	Type
X	Residential BAT for Client 0000000 created at 0905 Mon 10 Nov 2025	10/11/2025	Residential BAT



**ALWAYS** create a  
new BAT in Socrates.

**Do NOT** duplicate a  
copy that you already  
have and reuse it.



# Exploring the Purpose, Plan View and List View tabs

# Plan View

# Entering & sharing information



# Plan View

## Entering & sharing information



# List View

# Entering & sharing information



# List View

# Entering & sharing information



# Entering information into GPT and Socrates

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# Recording the funding allocation in 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.

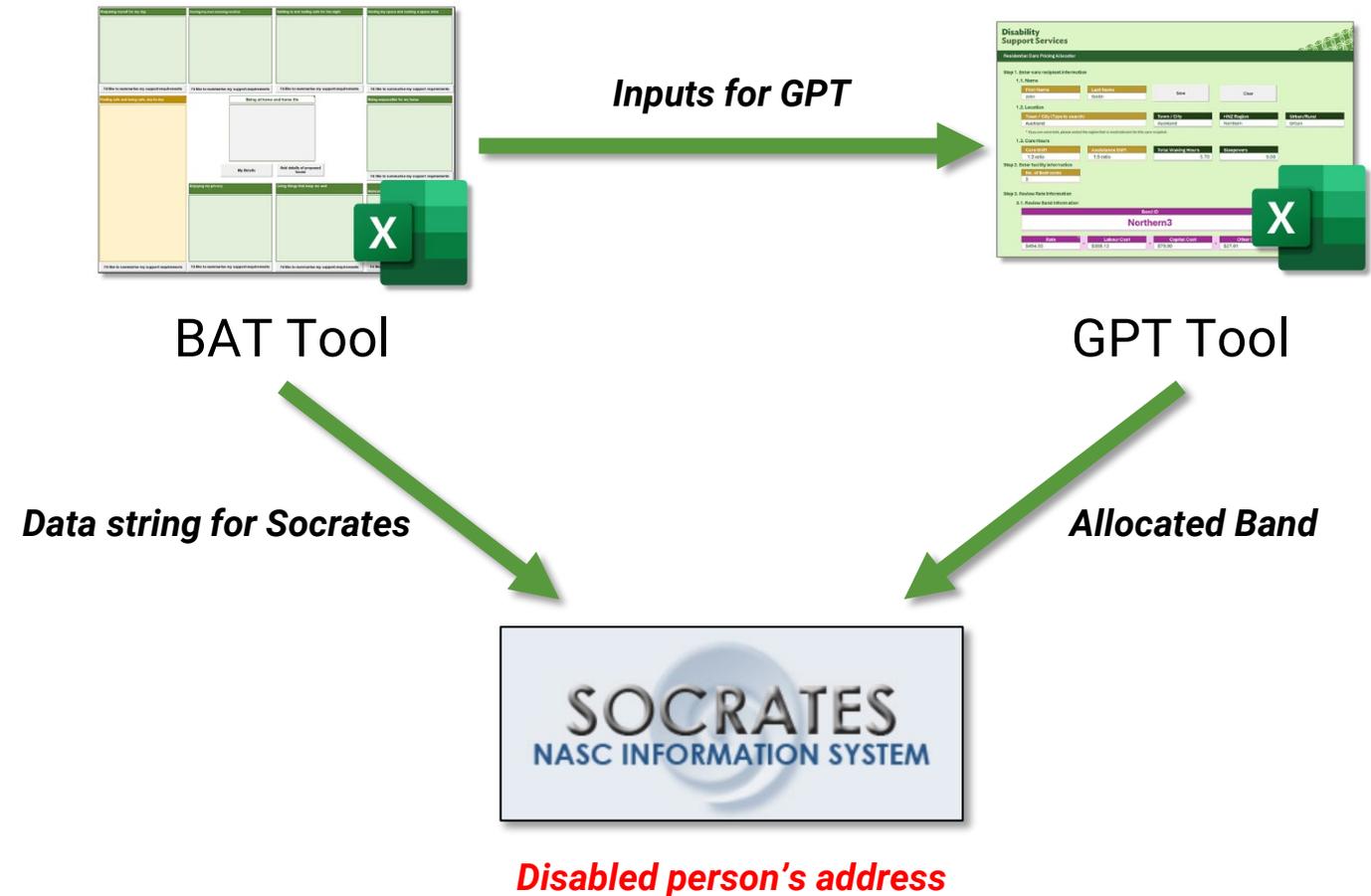
In client documents the following are saved:

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



# Entering data

- Generate a copy of the GPT in Socrates
- Copy the **Inputs for GPT** from the BAT to the GPT to determine the rate that should be offered to the provider
- Allocate a service in Socrates, choosing the appropriate **Service ID**
- Close the GPT
- Copy the **Data string for Socrates** from the BAT into the **BAT Rationale** in Socrates
- Close the BAT file in Socrates
- Update the disabled person's address in Socrates



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**Maintain Client** Exit Services File Notes Tasks Status Review Events Save

Alerts File Notes Summary ESS Actuals

Alerts Others In Home

Name  
Address  
DOB, Gender, CSC and Notes  
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- BSS Request for ID Assessment
- Residential BAT \***
- Residential GPT \***

Delete	Description



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## Service Coordination

View Needs Assessment View Client Save Back

Alerts Others In Home

Service Coordination  
DSS Services and Requests  
Discretionary Goods and Services  
Non-DSS Services  
Unmet Needs  
Outward Referrals  
Finalisation  
Manage Requests and Authorisations  
Reports and Letters

### Service Coordination

Service Coordination ID:  
NASC:  
Coordinator:  
Contact Date:  
Method of Contact:  
Date of Service  
Coordination:  
Date Support Plan Completed:    
Date Support Plan Received:    
Late Coordination Reason:  
Service Coordination Type: Following Reassessment  
Is Urgent Services?: No  
Reconsideration Requested By:  
Frequency of Intensive Service Coordination:  
Total Disability Support Level:  
SPA Level:  
SPA Age Group:  
Reassessment Request Date:





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## Service Coordination

View Needs Assessment View Client Save Back

Alerts Others In Home

- Service Coordination
- DSS Services and Requests**
- Discretionary Goods and Services
- Non-DSS Services
- Unmet Needs
- Outward Referrals
- Finalisation
- Manage Requests and Authorisations
- Reports and Letters

### DSS Services

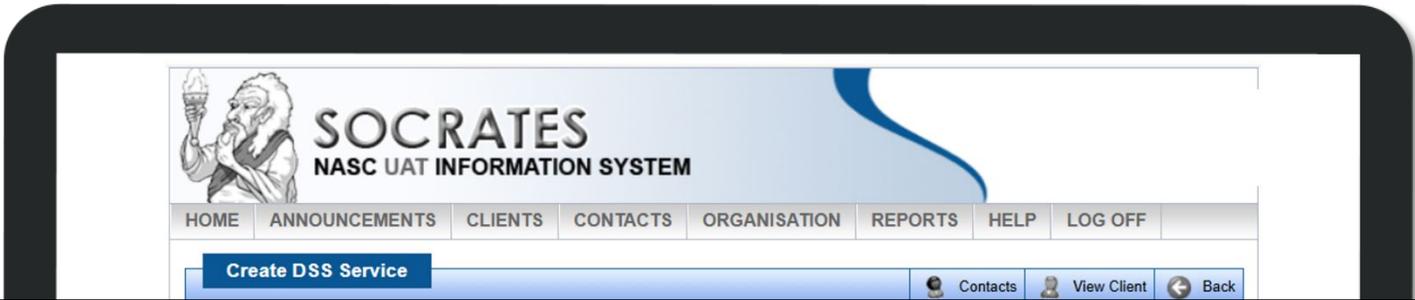
Add New DSS Service +

Provider	Service	Quantity	Start Date	End Date	Annualised Cost	Status
Carer Support Provider	Young Persons Carer Support	35.00	23/12/2024	21/12/2025	\$2,807.69	Exported

Annualised Cost: \$2,807.69

Previous Next





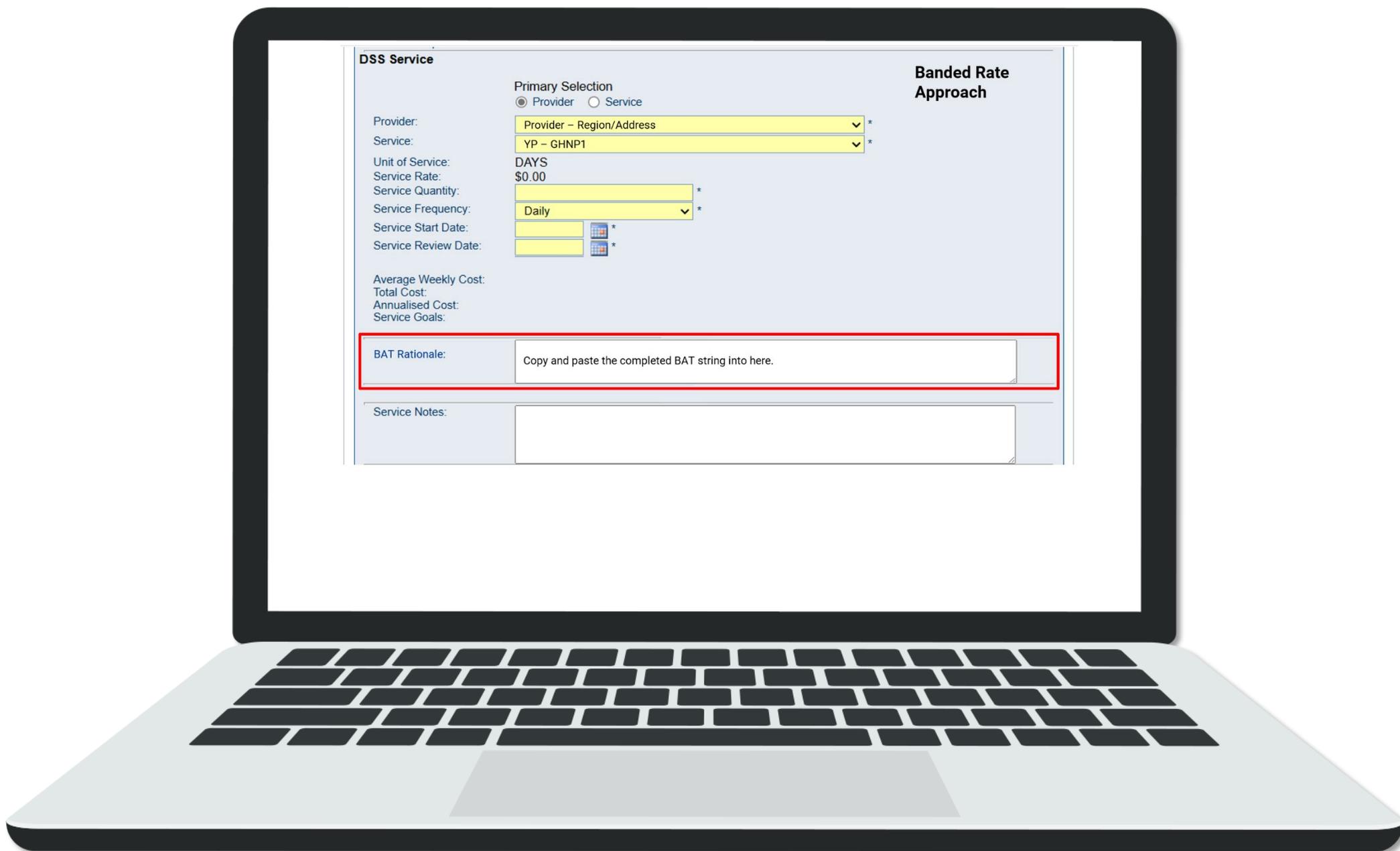
**Y P - G H N P 1**

**Group Home**

**P – Physical Disability**  
**I – Intellectual Disability**

**N – Northern**  
**M – Midlands**  
**C – Central**  
**S – Southern**

**1 – 6 (Bands)**  
**E – Exceptional Rate**



**DSS Service**

**Banded Rate Approach**

Primary Selection

Provider  Service

Provider:  \*

Service:  \*

Unit of Service: DAYS

Service Rate: \$0.00

Service Quantity:  \*

Service Frequency:  \*

Service Start Date:  \*

Service Review Date:  \*

Average Weekly Cost:

Total Cost:

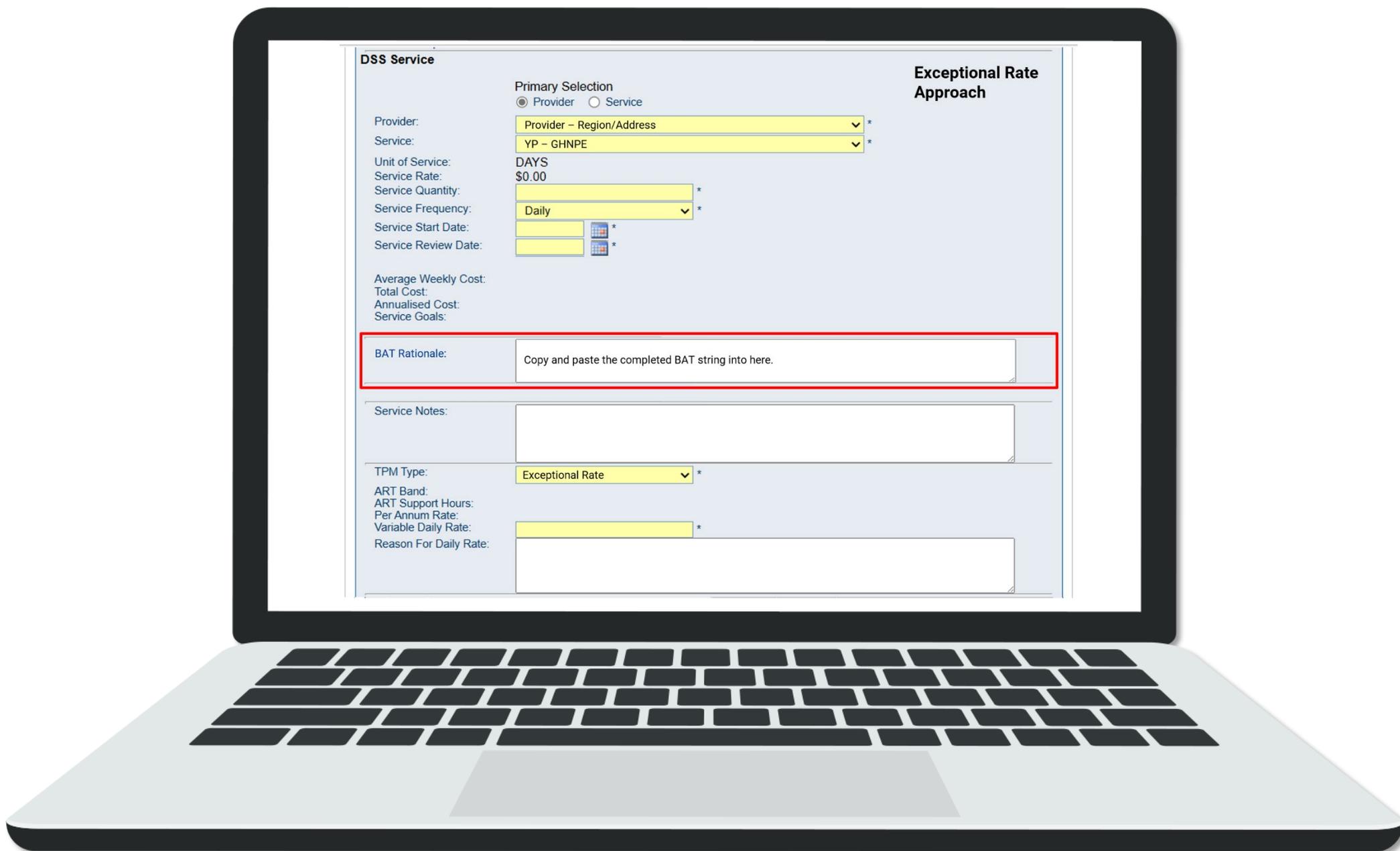
Annualised Cost:

Service Goals:

BAT Rationale:

Service Notes:





**DSS Service**

**Exceptional Rate Approach**

Primary Selection

Provider  Service

Provider:  \*

Service:  \*

Unit of Service: DAYS

Service Rate: \$0.00

Service Quantity:  \*

Service Frequency:  \*

Service Start Date:   \*

Service Review Date:   \*

Average Weekly Cost:

Total Cost:

Annualised Cost:

Service Goals:

BAT Rationale:  \*

Service Notes:

TPM Type:  \*

ART Band:

ART Support Hours:

Per Annum Rate:

Variable Daily Rate:  \*

Reason For Daily Rate:



**ALWAYS** open GPT  
from Socrates.

**Do NOT** save a copy  
and reuse it.





# Questions?

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# Wrap Up / Q&A

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# Questions?

*A lot of what you have seen in this session is covered in the User Guide. We also suggest you work through a self-paced learning activity to become more familiar with the tools.*

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# Thank You

Next session:

- Recap – The funding allocation process
- Exceptional Rates
- Where to access training and support material
- What's next for you?
- What's on the Radar?
- Training conclusion

**THANK YOU.**