Disability Support Services

Introduction to Residential Pricing changes

BAT in action

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Nau mai, haere mai

Welcome

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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

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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

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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.

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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.

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Accessing the Facilities List

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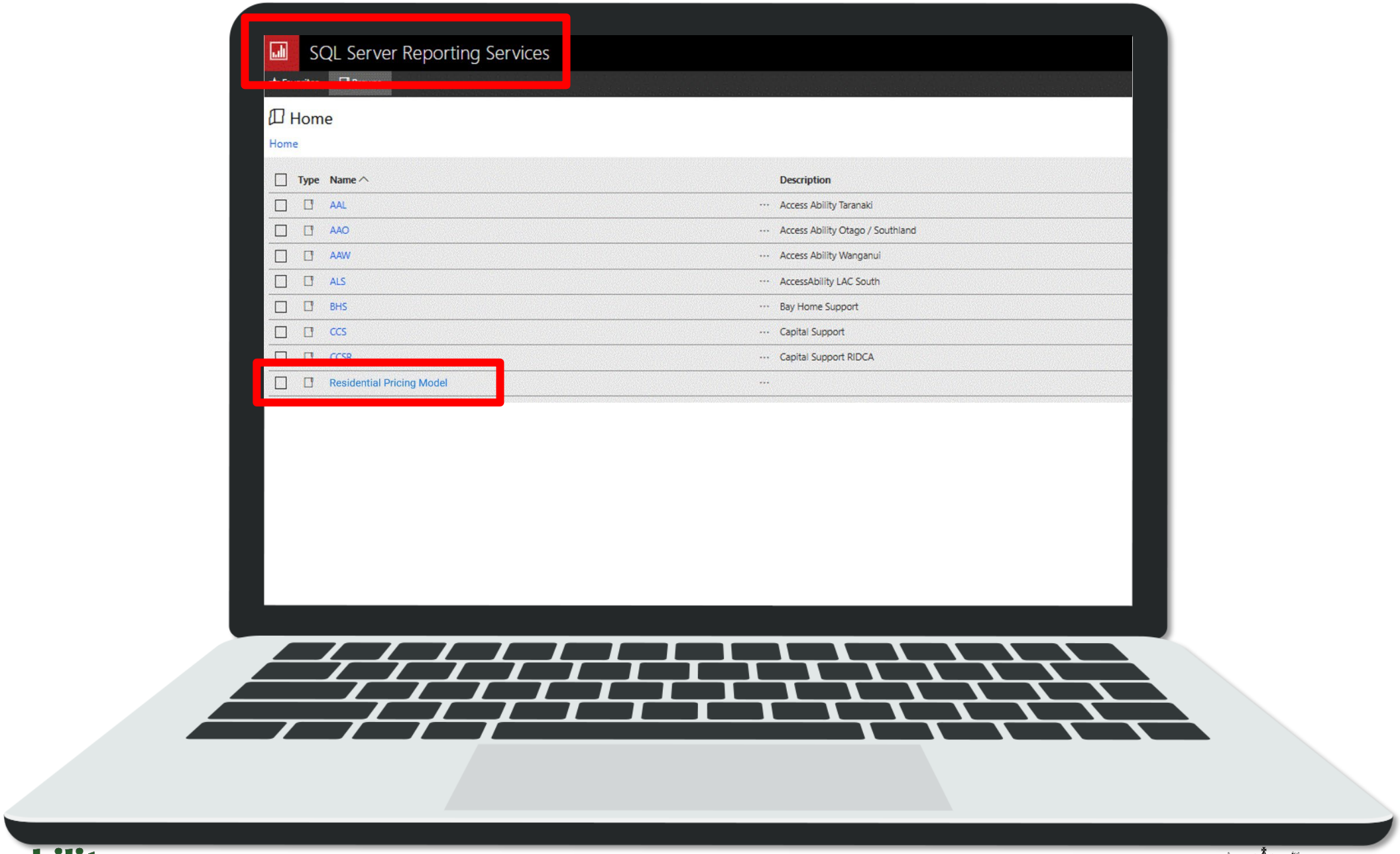

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ALWAYS open the Facilities List on Socrates.

Do NOT save a copy and reuse it.

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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
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

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ALWAYS create a new BAT in Socrates.

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

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Exploring the Purpose, Plan View and List View tabs

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Plan View

Entering & sharing information

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Plan View

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List View

Entering & sharing information

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List View

Entering & sharing information

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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:

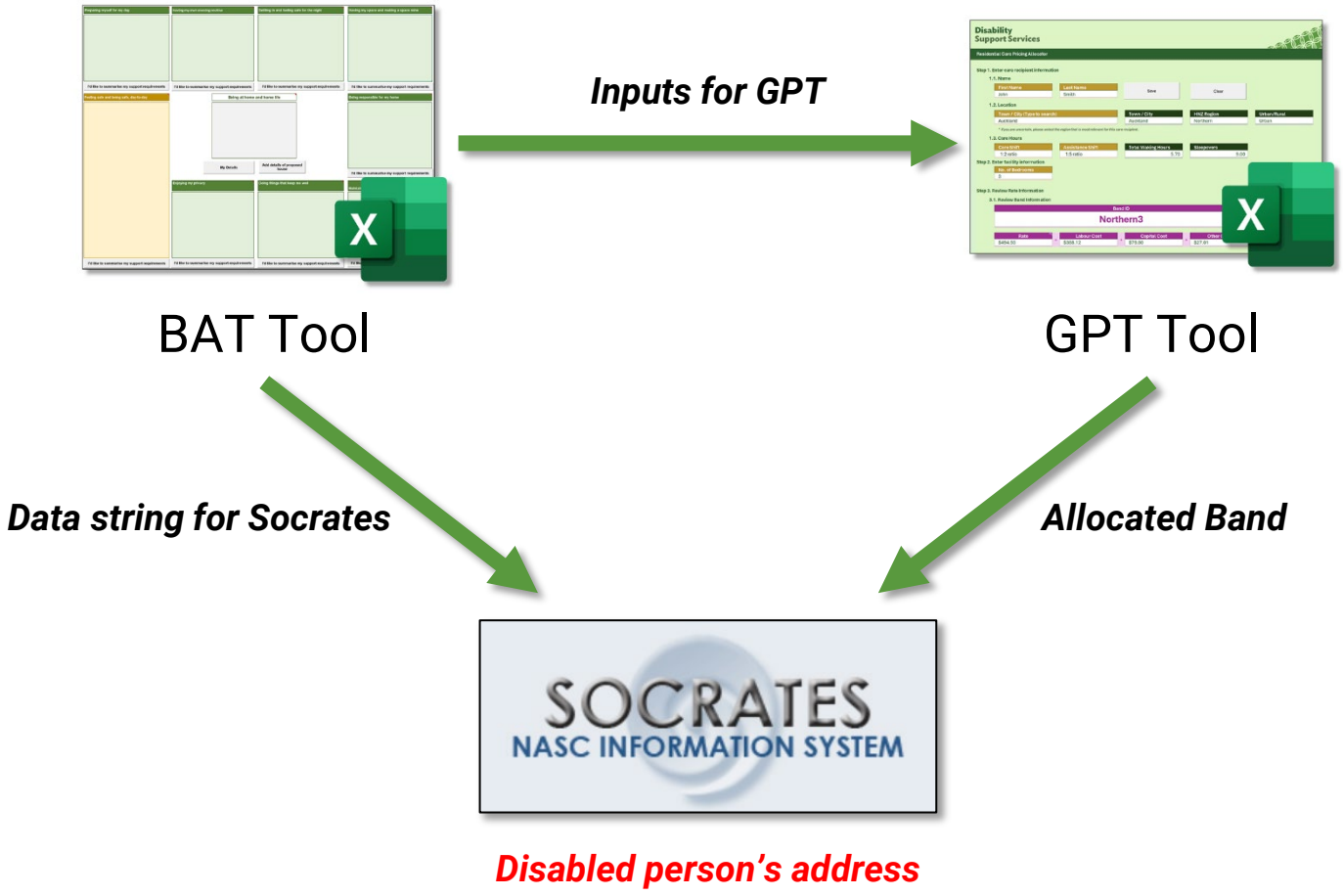
- the service ID corresponds to the person's region, and GPT output,
- the correct provider region is selected,
- the BAT rationale is copied and pasted.

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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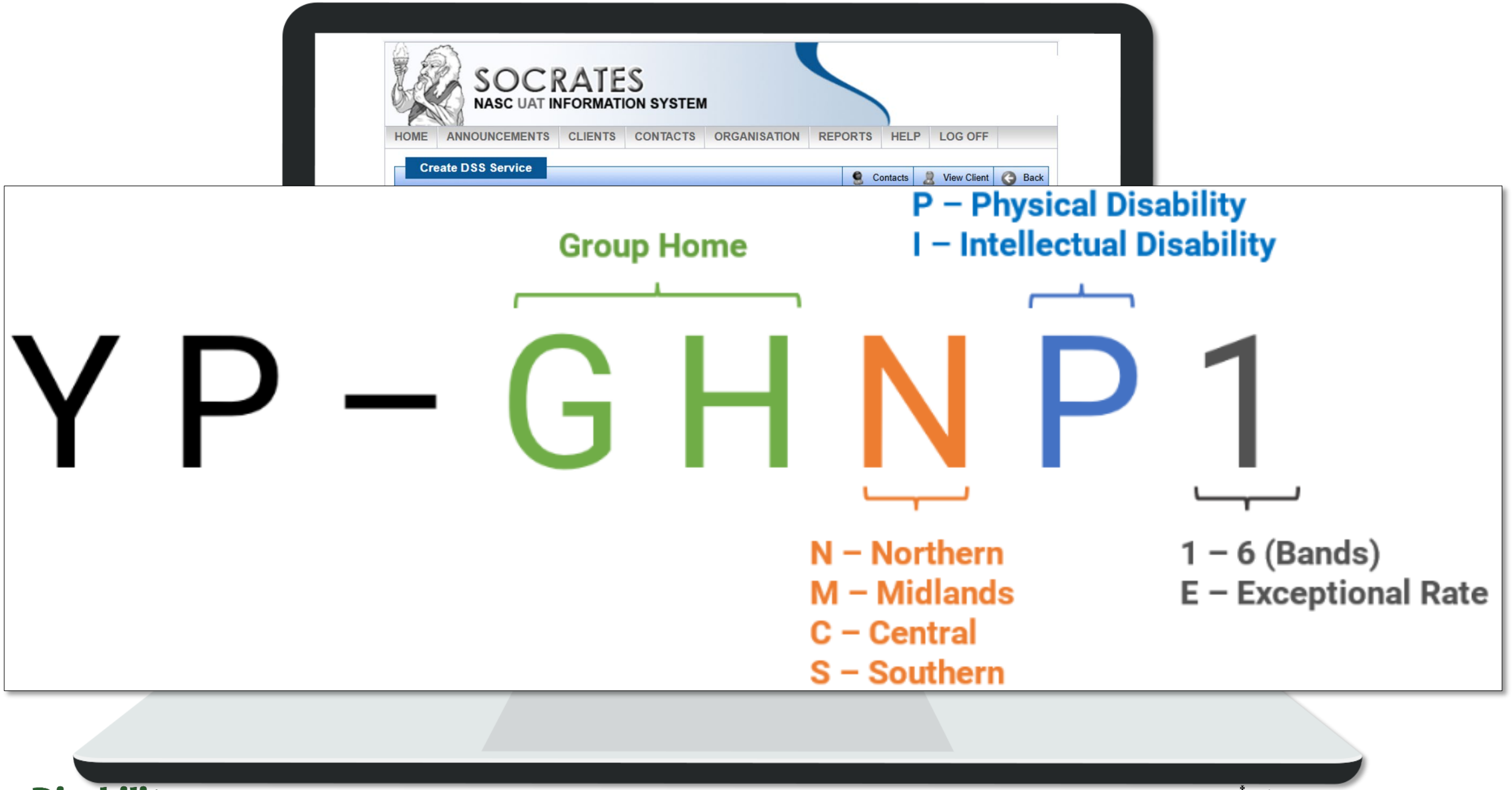

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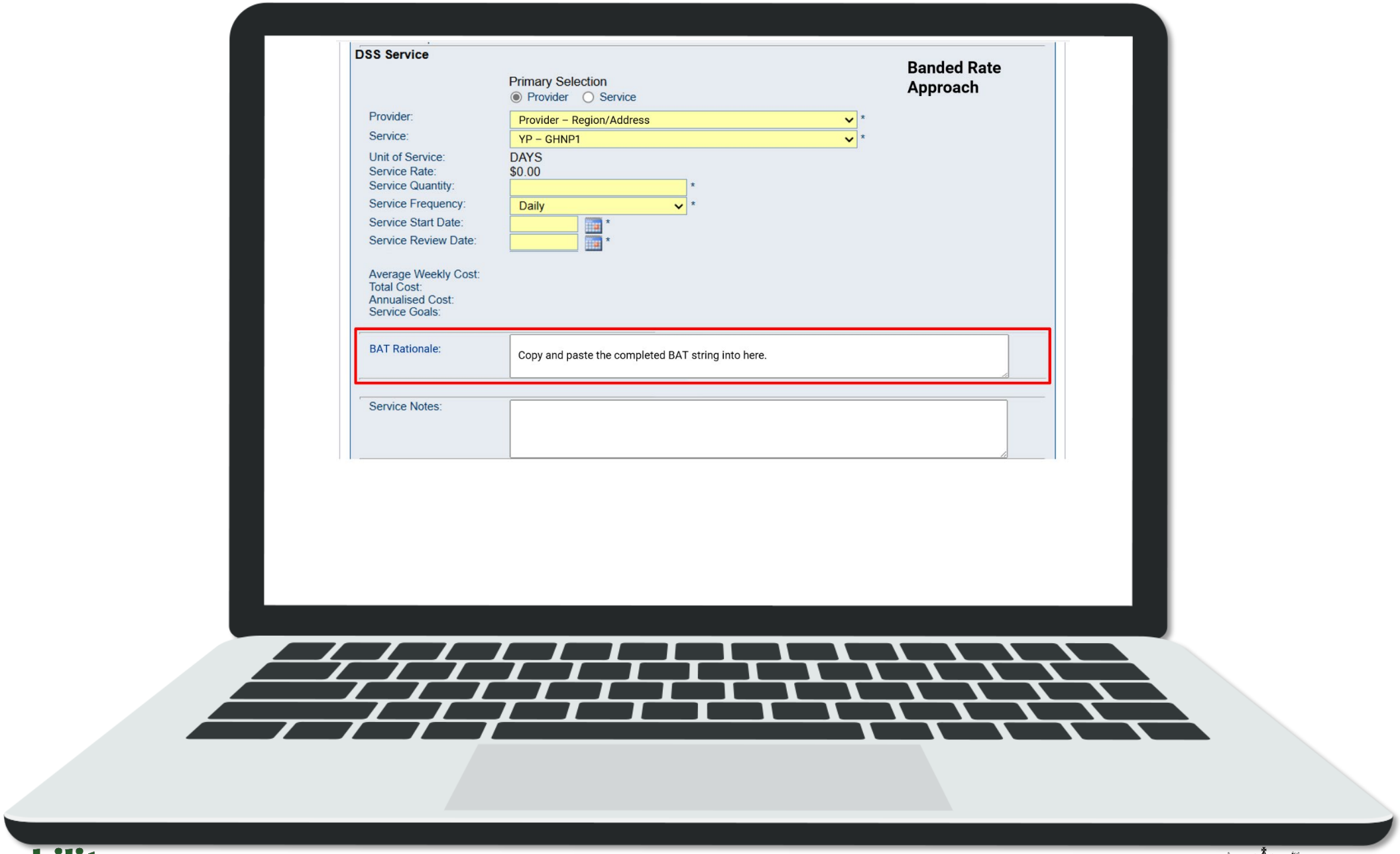

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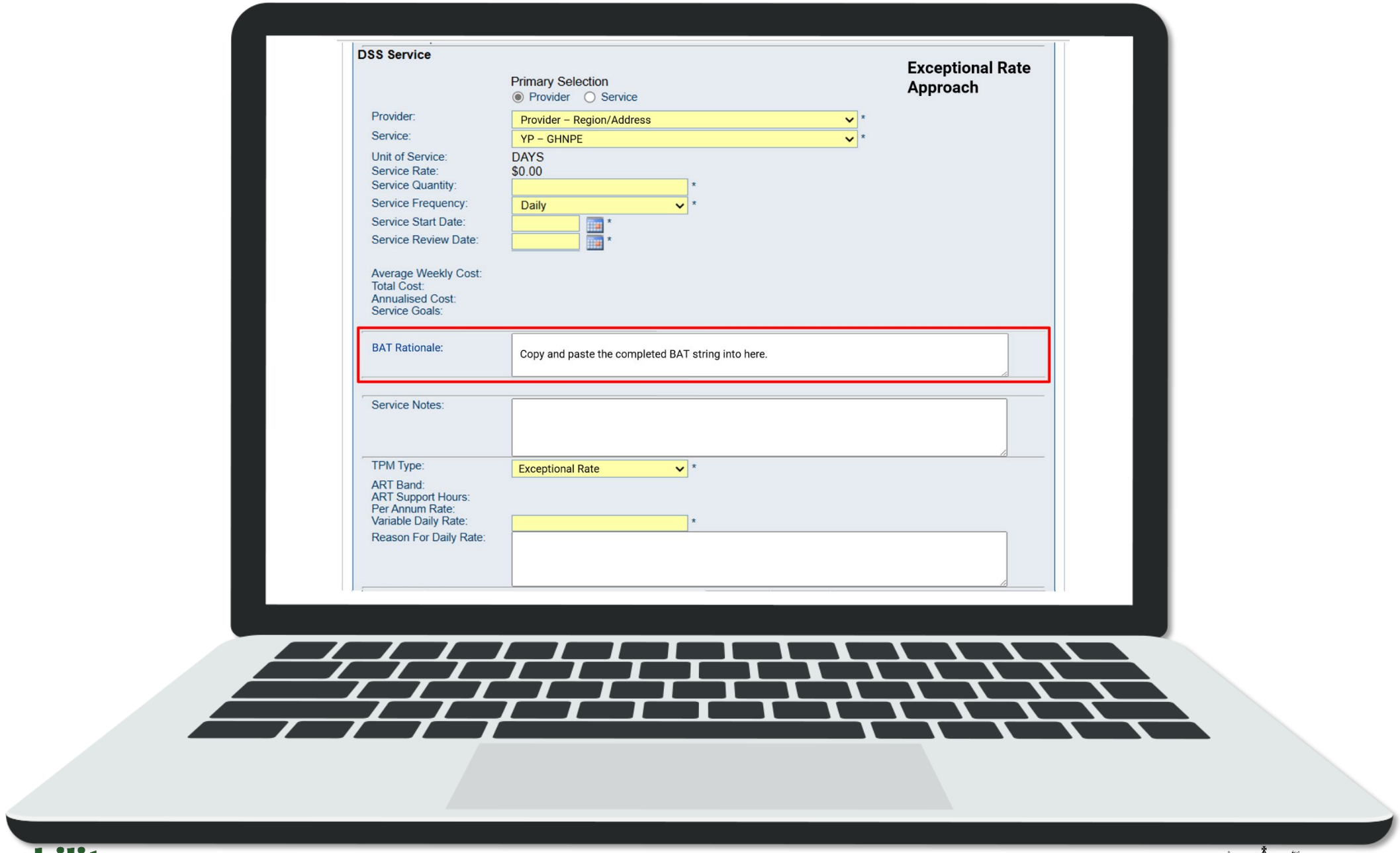

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ALWAYS open GPT from Socrates.

Do NOT save a copy and reuse it.

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Questions?

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Wrap Up / Q&A

Learning Goals

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