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# Shared Services User Guide

# Contents

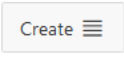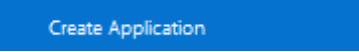# 1. Creating and Maintaining Applications

## 1.1 Creating a New Application

Note: It is good practice to query Northgate Housing to see if an application already exists prior to creating an application. This can either be done via MyPortal, ClientView or Allocations, Applications.

Having established that there is no current application for the client the user can create a new application and then answer questions and enter other data in order that the application may be given an active status and assessed if required.

These are the steps to perform the task.

1. Click **Housing**. It is likely that on login this tab will be defaulted.
2. Click **Allocations – Applications**. It is likely that on login this tab will be defaulted if the user is linked to an appropriate Security Group.
The default summary page appears.
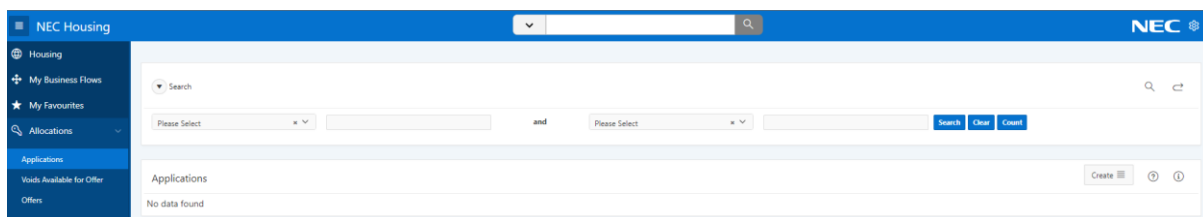


3. Click Create ☰ Select **Create Application** from the dropdown list.



4. The Create an Application wizard appears.

## 1.2 Application Details Subpage



1. Enter the date the application was received (this may be backdated).

2. Enter optional Rent Account (landlord / account no) Note. This is not needed if the application list entry is a Transfer Type as the balance will be displayed from the associated rent account.

3. Click 'select all' tick box or individually select appropriate lists.

4. Click **Next**.

## 1.3 List Entry Details Subpage



To complete this task, perform the following steps:

For each rehousing list displayed

1. Assign a category and category start date if appropriate. (Depending on configuration to reflect policy not all lists will allow a category to be assigned).

2. Amend the defaulted Status code (UE - Under Entry) if required and provided the system configuration allows.

3. Assign an Area Office code from the drop down list.

4. Click **Next**.

## 1.4 Involved Parties Subpage for Applications



To complete this task, perform the following steps:

All Applicants

1. Click the **Person search** icon to display the Quick 'Person' search.

(See below for alternative 'Tenancy' search for Transfer applicants).

Non-Tenant Applicants

2. Enter known/required details of the main applicant and click Search.



Note the search will be performed exactly on the details entered. It is useful to remember that a person record may exist but the details may vary.

A person record cannot be created until a search has been performed.

3. If a match is found click **select** to return the record to the Involved Parties subpage.

4. If no person is returned click the Create Person button Create Person. This will launch the **Create Person** wizard.

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The criteria entered in the previous search page will be brought forward so they do not need to be re-entered.

5. Complete all mandatory fields and any optional ones as required and then click on the Next button. This will take you through to the Addresses page of the Create Person wizard.
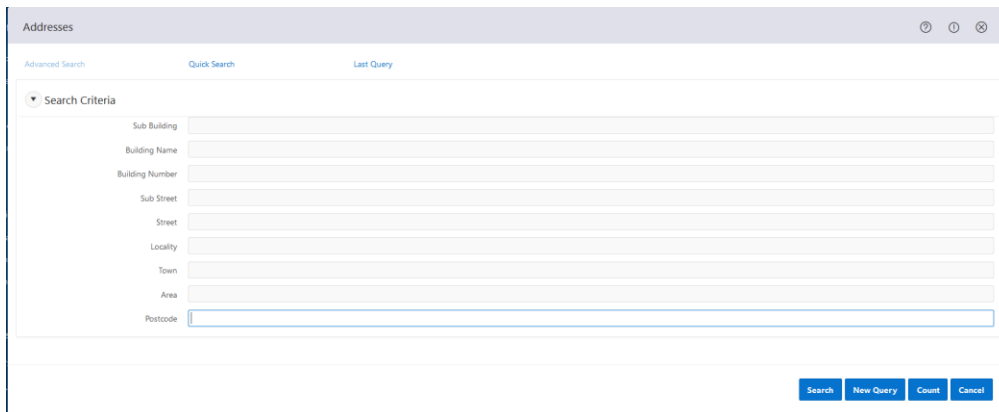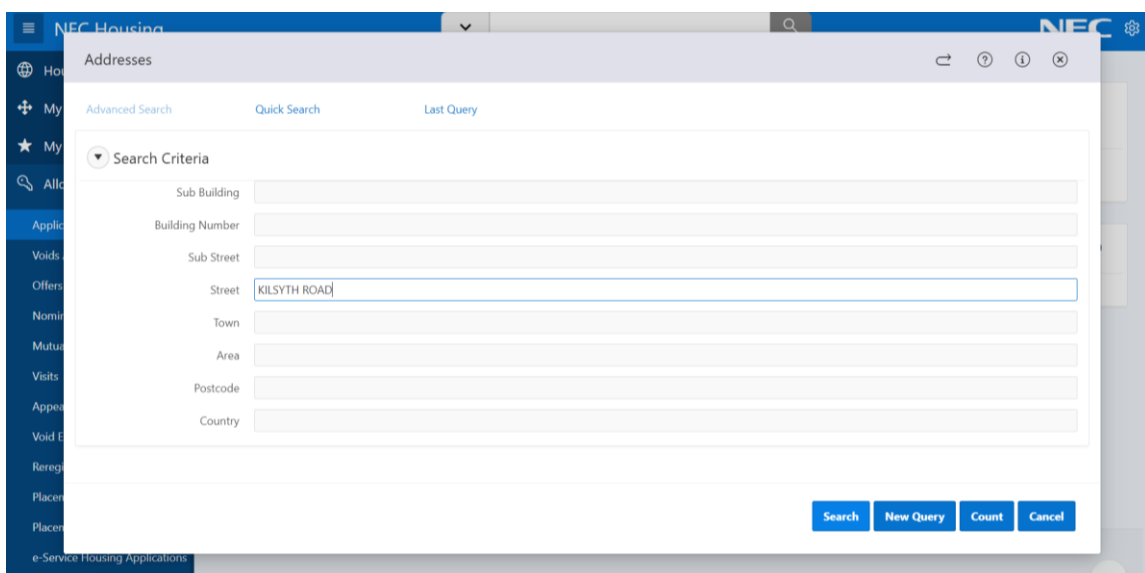


6. Select the appropriate Usage from the drop-down list E.g.



7. Click on the search icon to search  for the applicant's address.

**8.** Enter the relevant search criteria, which will typically be a combination of Building Number and Street and click on the [Search] button.



If the address already exists it will display in the Addresses region below the search.

**9.** Click on the Select label [Select] to choose the record.

If the address does not exist then the Addresses region will display '**No data found'**.

**10.** If the address does not exist but the Street does then click on the Select label [Select] to choose the record from the Streets region. Any missing address data can then be entered and saved by clicking on the Save button.
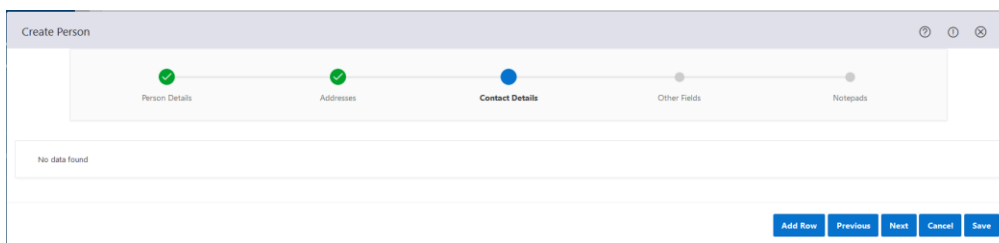
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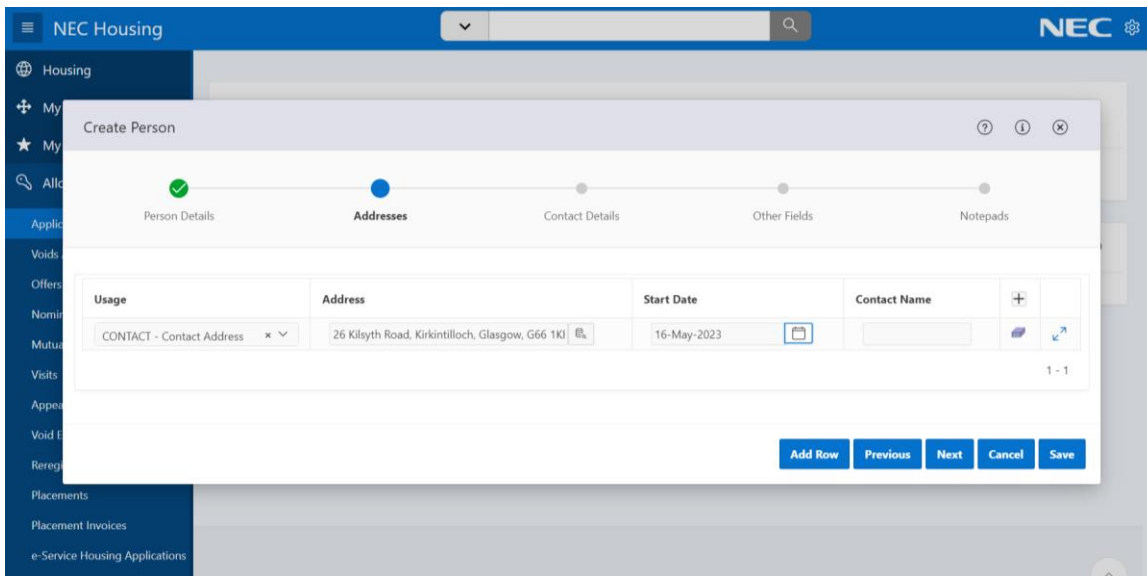
**11.** Enter the Start Date for the address and click the Next button.



**12.** Enter any contact details as required. The Contact Method drop-down typically contains values such as phone numbers, email etc. The **Add Row** can be selected to add more than one contact method.
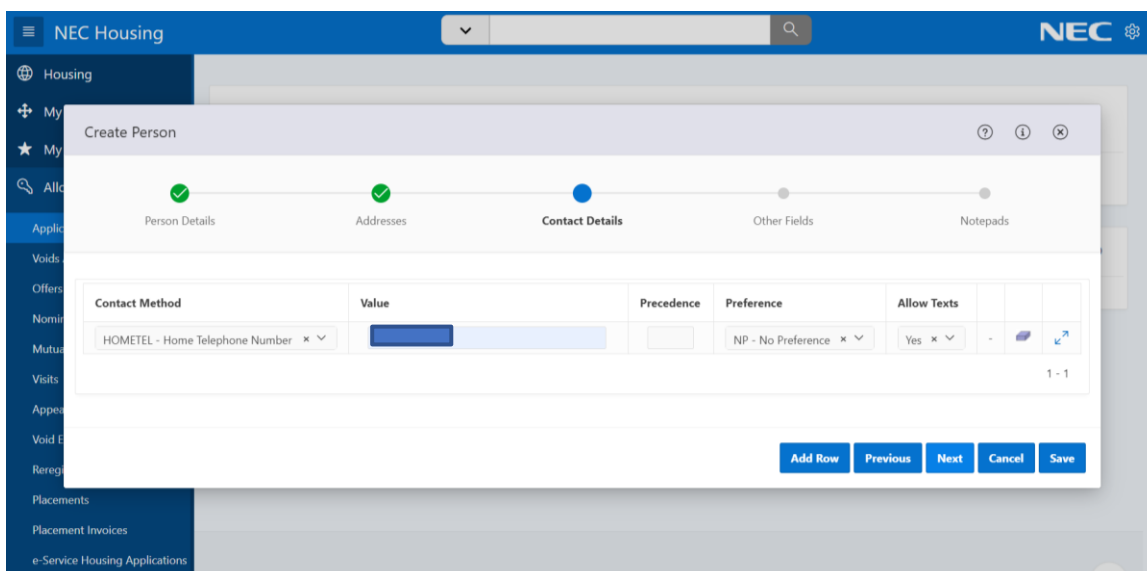


**13.** Click on the **Next** button to add any Other Fields and Notepad details if required or click on the **Save** button if no additional details are needed.

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14. When a person is found or created **Expand** the record to reveal further data and amend as required.

15. Click **Update** to check and update person details if required.

16. Click the **Save** button to commit changes.

17. Click **Add Row**, if required, and repeat the person search, using create and/or update for remaining members of household.

18. Click **Next**.

Note: The indicators for main applicant, joint applicant and rehouse default as ticked for the first person entered. The relationship code for the main applicant will also default if so configured. Other involved parties default values may be amended.

## 1.5 Transfer Applicants

If any of the Rehousing Lists selected are of type 'T' (Transfer) the search icon will display the Tenancies Search which will allow the user to make an association to the tenancy records and bring into the application the tenant(s) person details and the person details of any known household members. New household members may be added and existing ones deselected if they are not included in the application.
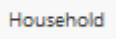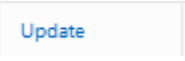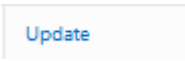
To complete this task, perform the following steps:

1. Enter known/required details of the tenant and click search

If no match is found the details should be checked / investigated

2. Click **Select** to return the appropriate record to the Involved Parties subpage

The tenant and any joint tenant details will be displayed:

3. Click the **Household** button to add other household person details that may already exist.

4. For each person click **expand** the record to reveal further data and amend as required.

5. For each person click **Update** to check and update person details if required. Click the **save** button to commit changes.

6. Click **Add Row**, if required, and repeat the person search to search for or create additional people on the application who are not already part of the household.

7. Click **expand** and **Update** for remaining members of household.



8. Click **Next**

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Note: The indicators for main applicant, joint applicant and rehouse default as ticked for the first applicant. The relationship code for the main applicant will also default if so configured. Other involved parties default values may be amended. Applicants on Transfer lists are linked to their current tenancy enabling display of rent account balances, links to their tenancy records and functionality to update applications if people are added to their household or their tenancy is ended.

## 1.6 Correspondence Details Subpage



The Correspondence Name is populated with the names, initials and titles of the joint applicants entered previously.

If the application is for a Transfer type list the address associated with the tenancy will be defaulted.
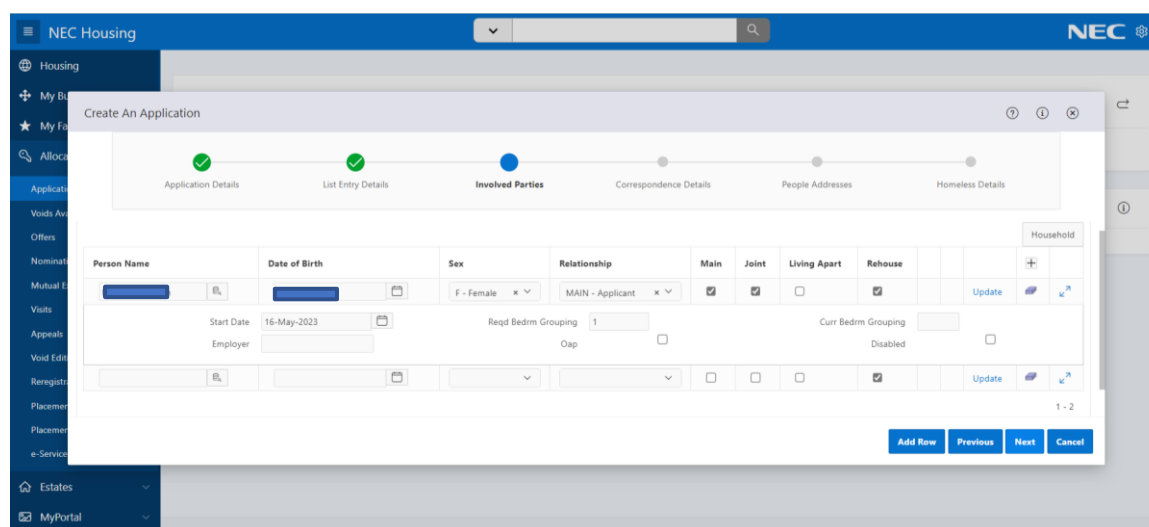
To complete this task, perform the following steps:

1. For non transfer applicants click the **Application Address** search icon and enter search criteria.

2. Matching addresses and streets are displayed.

3. If an address match is found click **Select** .

4. If the street only is found this may be selected to create a new address (see Structured Addresses).

5. After a new address is created click **Select** .

6. Click **Next** .

## 1.7 People Addresses Subpage for Creating Applications
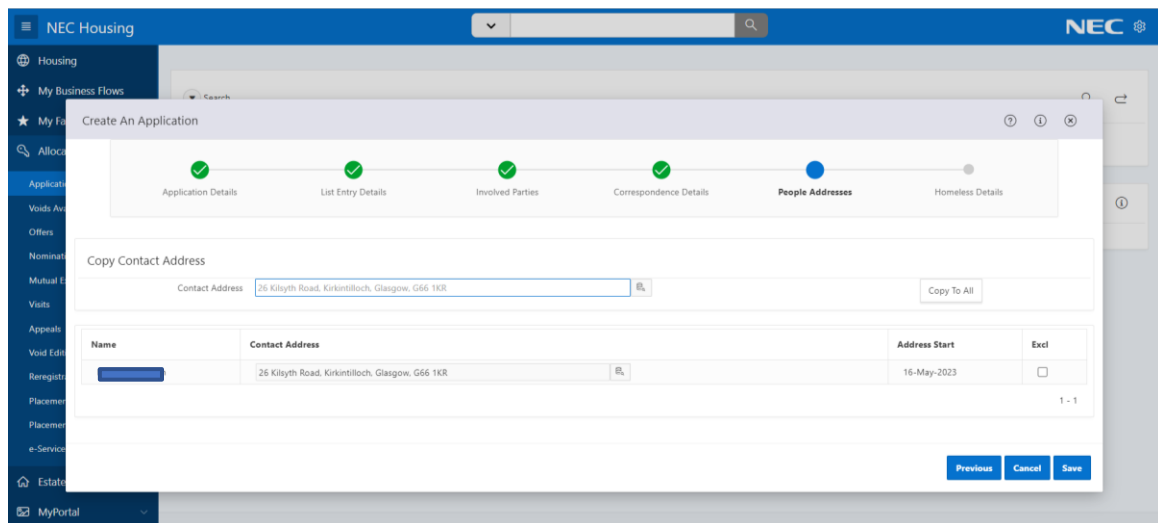


Once an application address has been created it defaults as the contact address for the involved parties.

To complete this task, perform the following steps:

1. Click **Copy to All** [Copy To All] for use on all involved parties. A default start date will be populated for all parties to which the address is copied.

   Note: If any involved parties are to be recorded at another address they may be excluded from the copy to all facility using the Excel tick box.

2. Alternative addresses for individuals may be searched for and entered using the address search icon as before.

3. Click [Save] .

   The Application summary page is displayed with the applicant's details

   Note: The Homeless Details subpage is only available when a rehousing list of type H has been selected on the Application Details subpage. See Homeless Training Manual for details.

   If this is not a Homelessness type Rehousing list then click on [Save] to complete the wizard. Otherwise click on the Next button and enter the relevant Homeless details.

   On saving the details the user will be returned to the Applications Summary page.
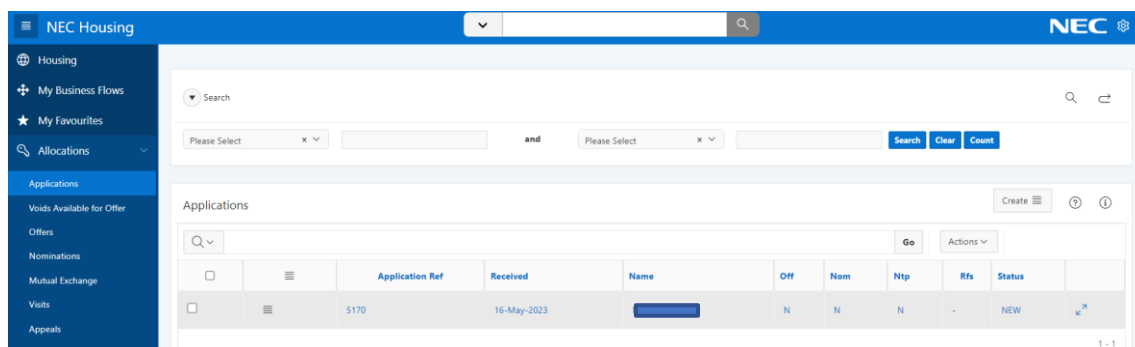
## 1.8 Update an Application

When someone submits a new application but currently have an active application, you will update the active application. This can be done by updating the List Entry (what list they sit on – Local/Other), Contact Details, Applicant Address, Lettings Area (Area Choice) or Questions.

Update the List Entry

1. Search for the Application and open.
2. Select List Entries.
3. Select the row action button in list entries and "Update Application List Entry".
4. Change the category to new category e.g. R Other to R Local and select Save
5. Use the Action button (top right) to Assess the Application.

Add Applicant

1. Search for the Application and open.
2. Select More from the Blue Banner at the top of the page then Involved Parties.
3. Select Create and Create Involved Party.
4. Use the Search Button at Person Name to search if the person is currently in the system (if not create the person here).
5. Populate the Relationship and Save.
6. Use the Action button (top right) to Assess the Application.

Remove Applicant

1. Search for the Application and open.
2. Select More from the Blue Banner at the top of the page then Involved Parties.
3. Select the Row Action in line with the application you with to remove.
4. Select End Involved Party.
5. Enter the End Date and Reason.

6. Select Save.
7. Use the Action button (top right) to Assess the Application.

Contact Details

1. Search for the Application and open.
2. Use the actions button (top right) and select Person Details.
3. Select Contact Details.
4. Use the corresponding row action button and select "Maintain Contact Details).
5. Update the phone number/email and Save.

Update Applicants Address (This will update everyone on the applications address)

1. Search for the Application and open.
2. Select More from the Blue Banner at the top of the page then Address Usages.
3. Select Create then Create Address.
4. Populate the required info
   Usage – APPLICATN
   Address – Use the search button to search for the new address
   Start Date – Start date of new address
5. Save

Update Lettings Area

1. Search for the Application and open.
2. Select List Entries.
3. Parent and Child the list entry
4. Select the arrow at Lettings Area to open.
5. "Maintain > Update and Answer" will allow you to add/remove area's chosen.
6. Select the area then select "Select" or "Unselect" at the top of the page.
7. Once you are finished, Save.
8. Use the Action button (top right) to Assess the Application.

Update Questions (All questions are in Appendix 1)

1. Search for the Application and open.
2. Select More from the Blue Banner at the top of the page then Questions.
3. Change the questions from Answered to All.
4. Search for the question you would like to update.
5. Use the corresponding row action and select Update Answer.
6. Amend the answer and Save.
7. Use the Action button (top right) to Assess the Application.

Update Notes

1. Search for the Application and open.

2. Select More from the Blue Banner at the top of the page then Notes.
3. Select Create then Create NotePad Entry.
4. Enter the update into the Text field.
5. Select Note Type of "Allocations General" and Save.

## 2. Additional Application Information

Once the application has been created it may be supplemented with additional details including:

- Answers to Questions, including Lettings Areas;
- Medical Referrals;
- Notepads;
- Visits;
- Contacts.

NOTE - The status of the application can be amended but all mandatory questions must be answered before an application can be given an active status, assessed and included in any shortlists.

To update and enter application information perform the following steps from the Applications Summary page.

**1.** Click the Row Actions button ☰ adjacent to the relevant application

**2.** Select **Maintain Application Details** which will then default to the **Maintain Application Details** page.
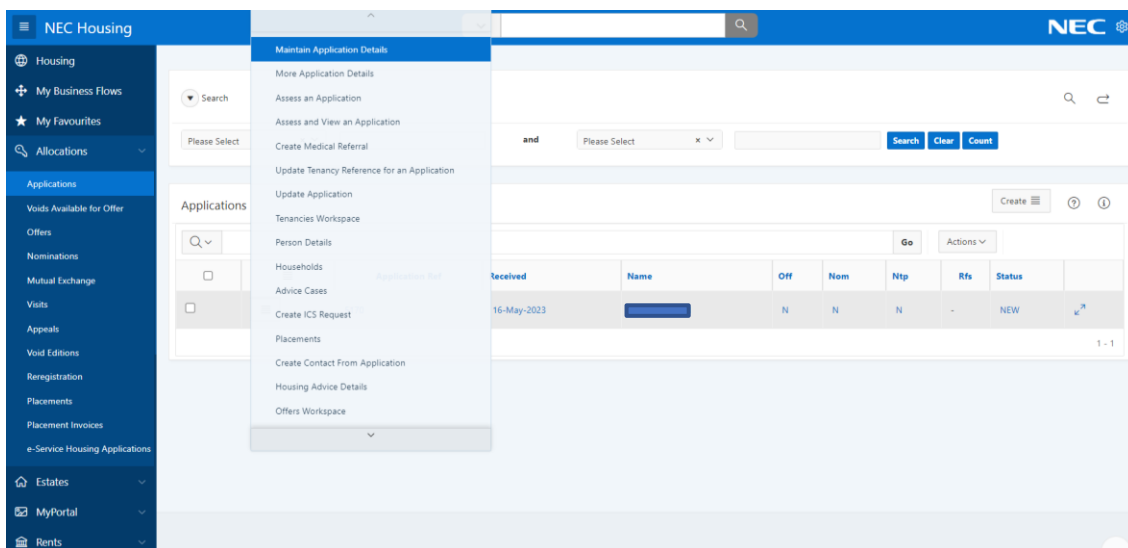
The Application Details region with a series of sub regions is displayed.
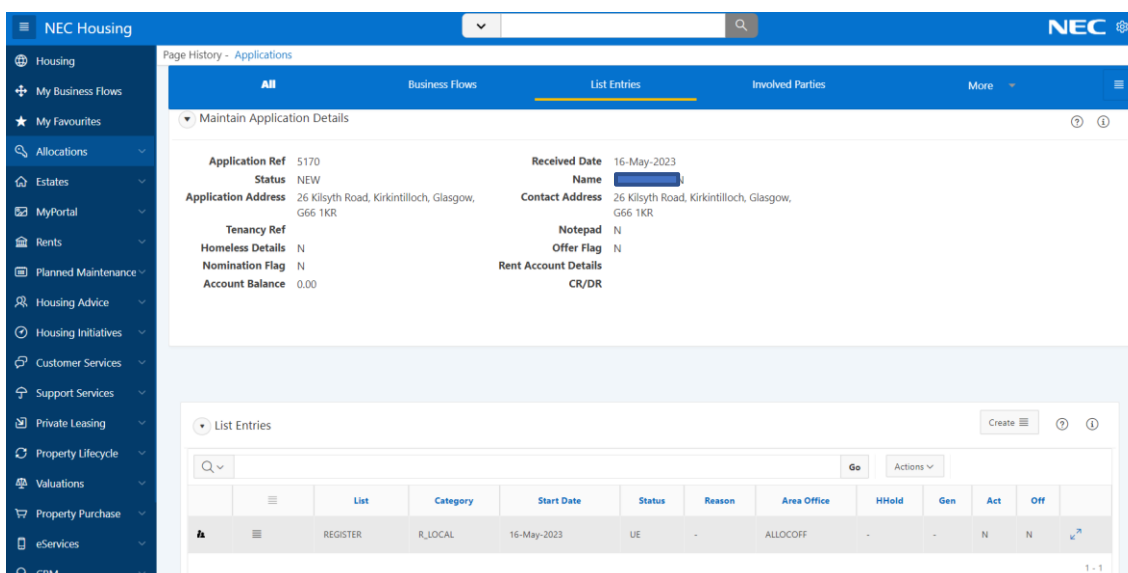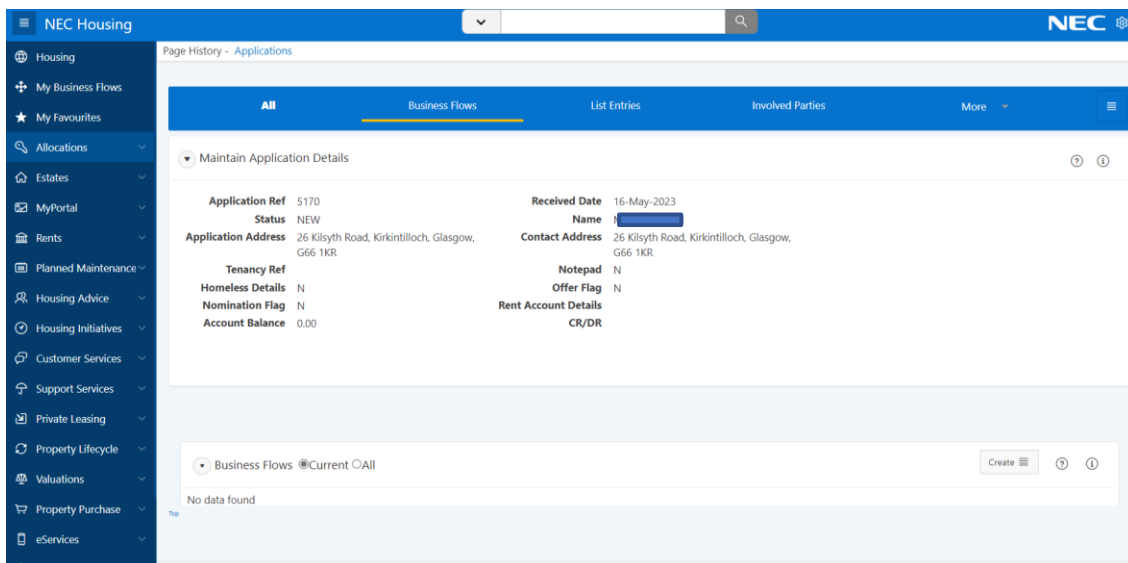




Where data exists it is displayed in the Region Navigation bar which may be used to access the sub region.

## 2.1 Answering Application Questions

General application questions can be answered within the context of the rehousing list that the applicant has been placed on or across all the lists that the applicant is placed on under the same application reference number.

Yes/No questions can be answered by selecting Yes or No from the drop down list or by typing Y or N in the answer field.

Numeric questions may be answered by typing a numeric value in the answer field. Up to 2 decimal places may be entered.

Text questions may be answered by typing directly into the answer field.

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Coded answers may be answered by clicking the icon to access a list of values. Where the list of codes is long the popup provides a search facility which may be used to limit the codes displayed to those whose code or description include the characters you enter in the search input box.

For any question where further optional details are required the expand icon at the beginning of the question row may be used open the detail block to enter data in optional code, optional text, optional date and comments fields. Optional codes are a non-mandatory configuration facility.



When optional data has been entered close the expanded detail area and continue answering questions. The optional data will be saved when the questions are saved.

The Update Answer region will display multiple questions over a series of pages. If further questions are required a Next button will be available.

Parent and Child questions:

During implementation some child questions may be linked to a parent question. Child questions are only displayed when a parent question is answered with 'Yes'. When answering questions, unless an individual question is selected for answering, the display will present all questions up to and including the first parent question. Dependant on the answer to the parent question the presentation of questions will move forward. If a parent question is answered 'Yes' the 'Next' button will call the child question(s) of that parent. Where child questions are presented and are mandatory they must be answered before the presentation of questions can move on. If the parent question is answered 'No' the display of questions will move on to the remaining questions, up to and including the next parent question, if there are any, and so on until all the end of the questions is reached.

Once saved answered questions are displayed in the **Questions** sub region from where they can be updated.


To complete this task, perform one of the following steps:

1. To answer the questions within the context of a rehousing list select the **List Entries** region  List Entries  and **expand the parent and child** icon to show the sub regions. Select the **Unanswered Questions** sub region and select **Update Answer** to access the Update Answer region for all questions.

2. To answer the questions for all lists (or if the applicant is only on one list) access the questions via the summary region in Maintain Application Details by selecting the unanswered questions region Questions .



## 2.2 Outstanding Application Questions

After answers to questions have been saved any questions that have not been answered will be displayed in the Unanswered Questions for the Application. **All mandatory involved party questions and general questions must be answered before the list entry status can be given a status that is active and the application assessed**. The information for an incomplete application can be saved and the application given a non-active status until the missing information is complete.

## 2.3 Lettings Area Question

The Lettings Area Question is linked to a lettings area hierarchy to allow the recording of demand for different areas, area matching and mutual exchange matching.

To complete this task, perform the following steps:

1. Use the Region Navigation bar to navigate to **More** then **Lettings Areas** Lettings Areas .
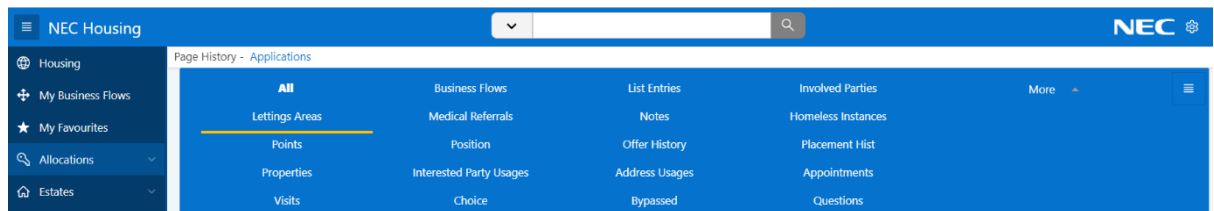


2. Use the Maintain ≡ drop down list on the Region header bar to select Update an Answer . The lettings area hierarchy is displayed on the left of the page.
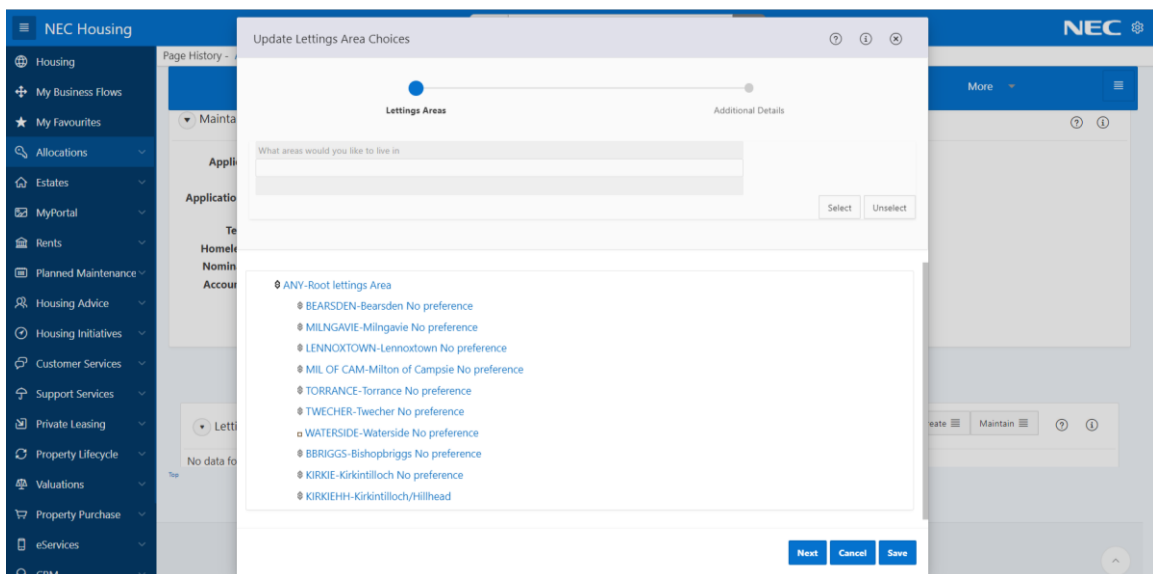


3. **Click the area** required, if necessary use the expand icon to open or close the area hierarchy. With the area required displayed on the right of the page choose **Select**. The display changes to insert the selected icon against the area and any child lettings areas. The Next button allows optional code, text, date or comment to be recorded.
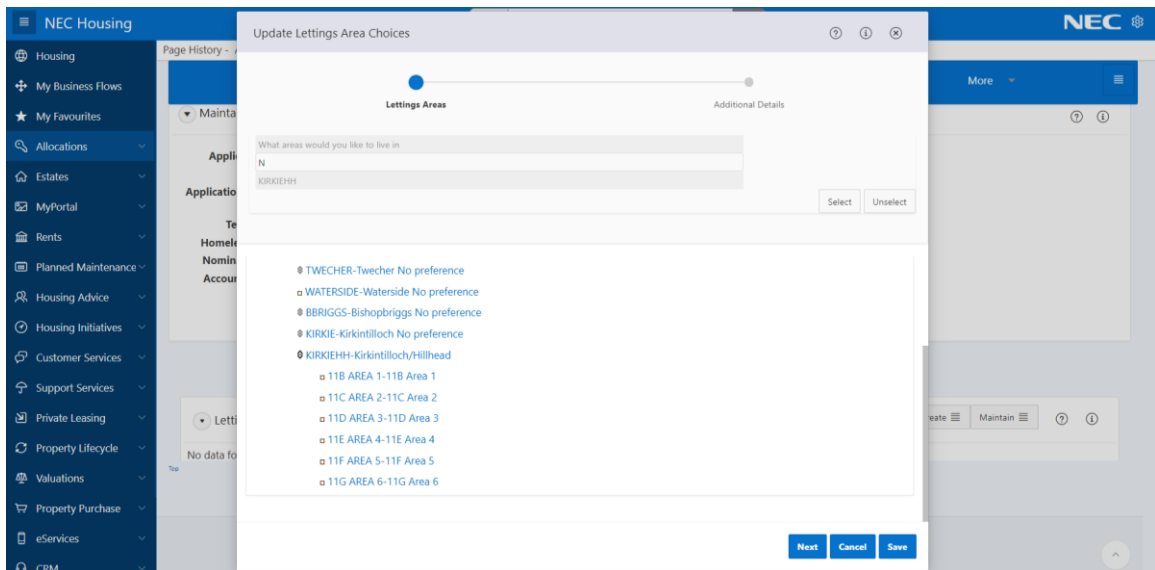
4. **Repeat to select further areas**. Areas may be deselected by clicking and choosing unselect. The selected icon is replaced with an unselected icon.

5. Click [Save] to confirm the areas of choice.

The Lettings Areas Region now displays the lettings areas selected.

## 2.4 Update the Application List Entry Status

To complete this task, perform the following steps:

1. Navigate to the **List Entries Region** [List Entries] .

The List Entries region displays the application list entry details of the application in context and is used to create, update and copy list entries.

3. In the List entries region and on the appropriate row, select [Update Application List Entry Status] from the Actions list.

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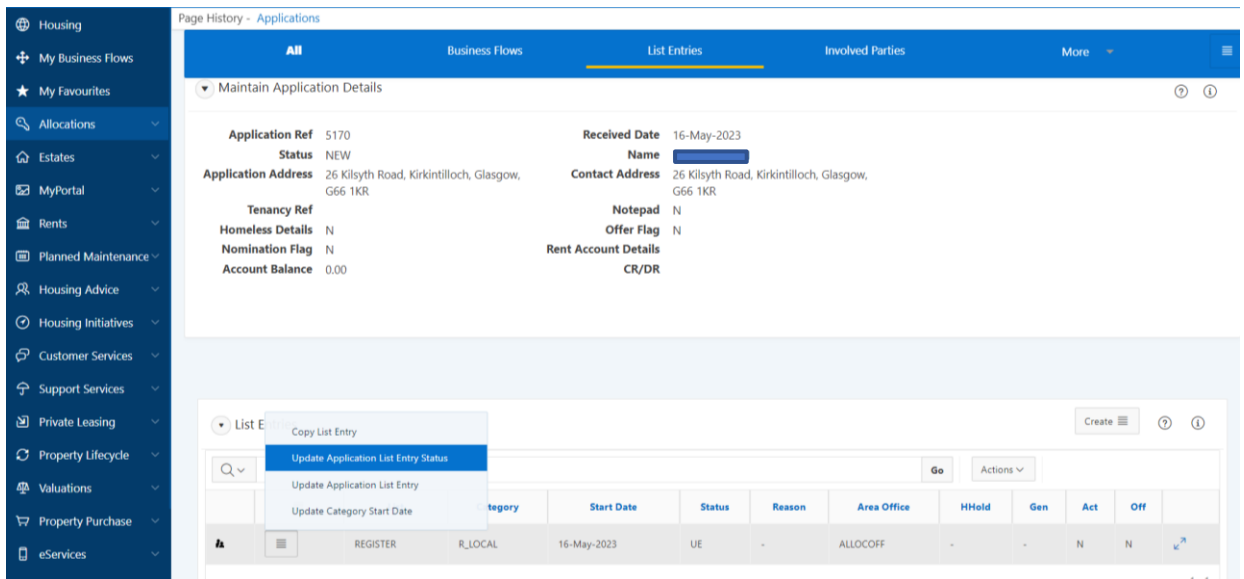
4. The Update List Entry Status wizard appears below.
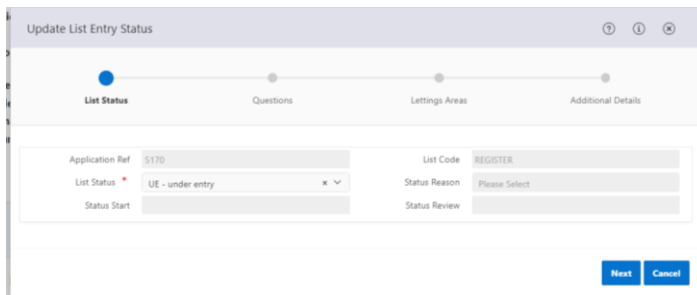


5. Enter the relevant data in the Update List Entry page, E.g. change the List Status to Active/Live by selecting the relevant code from the drop-down. Click on the Next button.

6. Answer any previously unanswered Questions. NOTE that mandatory Questions must be answered in order to move the Status to Active.

7. Update the Lettings Areas if required.

8. Click **Save** .

If the application list entry status is one that is marked as active an application may be assessed either manually or automatically.

Alternatively the user can select the Action to just update the List Entry by selecting the **Update Application List Entry** Action from within the List Entries region for the relevant List.

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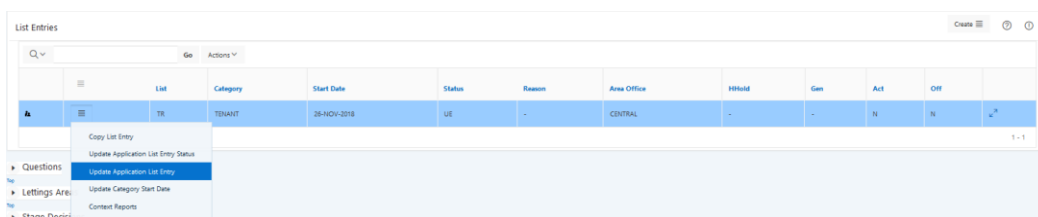
If the Status is being switched to Active the user will get an error message if any mandatory Questions have not been answered.
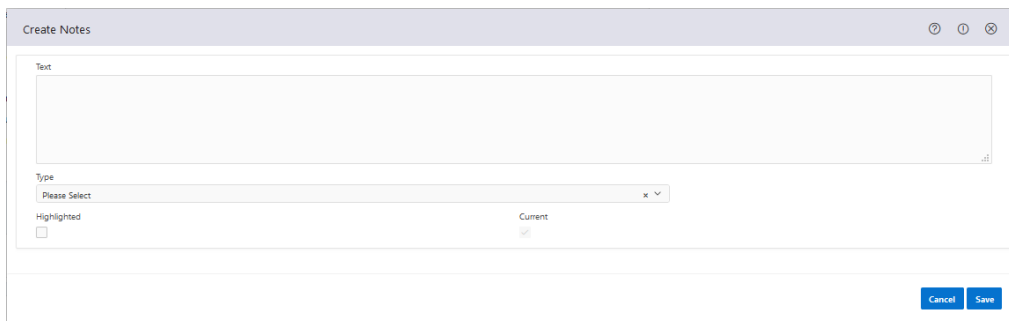
## 2.5 Notepads

To add free-text notes to an application select the Notes link from within the Maintain Application Details page.

The Notes region will display any notes created previously.
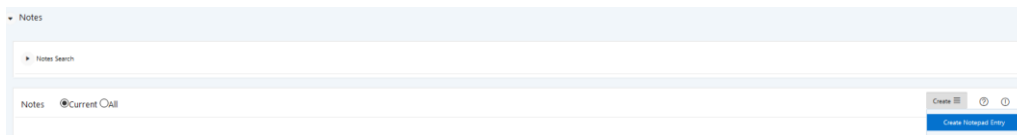


Add the text and if applicable select a Notepad Type, which can be used to pop-up a warning to any user accessing the application. Additionally the Highlighted indicator can be set to prioritise the notepad entry ahead of non-highlighted ones.



Click on the **Save** button to save the notes.

NOTE – notes can be edited within the first hour of creation but not thereafter.

# 3. Updating the Household

## 3.1 Adding Household Members

To add a person to the application go to the **Maintain Application Details** page.

Select the Involved Parties region Involved Parties .

From the Involved Parties region banner select the **Create Involved Party** Action.



The Person Search must be carried out before any person can be added to an application. Use the search icon to go to the search page and create the person as per Section 1.3.5 above if the person does not already exist.

Having created or retrieved the person then complete the additional details such as Relationship and click the **Next** button.

The wizard will then enable the user to answer any relevant Involved Party Questions. Once these have been completed click on the Save option.

## 3.2 Removing Household Members

To remove a person from the household and the application go to the Involved Parties region and select the Action End Involved Party from the Row Action menu for the specific person.

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Enter the End Date and End Reason from the drop-down list of values.

## 3.3 Changing The Main Applicant

Go to the main applicant record from within the Involved Parties region and select the **Change Main Applicant for Application** Action.





Enter the End Date and End Reason for the main applicant and select the New Applicant who will become the main applicant.

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## 4. System Icons

| Icon | Description |
|------|-------------|
| ☰ | Click the **Main Row Action** icon to view a list of different areas within the system. (THE BURGER) |
| More ▼ | Click the **More Chevron** icon to access the business and functional areas of the application. |
| ☰ | Click the **Row Action** icon to access a list of values from which you can select an action to perform. |
| Create ☰ | Click the **Create** icon to open the form or wizard used to create a record. |
| ▶ | Click the **Open** icon to view the contents of a region or form. |
| ▼ | Click the **Close** icon to hide the contents of a region or form. |
| ❯ | Click the **Next Page** icon to view the next set of records in a summary page region. |
| ❮ | Click the **Previous Page** icon to view the previous set of records in a summary page region. |
| ⤢ | Click the **Expand/Collapse** icon to display additional information relating to the corresponding record or to hide this additional information. |
| ∧ | Click the **Start of Page** icon to allow the system to automatically scroll up to the start of the summary or details page you are currently on. |
| 👥 | Click the **Select this record** icon to select the record in the corresponding row to display associated child regions. |
| 🔍 | Click the **Advanced Search** icon to access an advanced search from a summary page. |
| ↪ | Click the **Last Query** icon to resubmit the last query performed. |
| ⑦ | Click the **Help** icon to open the online help topic relating to the page, region or form you are using. The help button appears in the top banner or footer. |
| ⓘ | Click the **Help About** icon to view further information about the region or form you are currently in. |

| Icon | Description |
|---|---|
| ⊗ | Click the **Cancel** icon to close the region, form or screen you are in without saving your changes. |
| 📱 | Click the **Mobile** icon to indicate that you are using a mobile device. The screen will adapt so that it is fully optimised when in this mode. |
| 🖥 | Click the **Desktop** icon to indicate that you are using a desktop. The screen will adapt so that it is fully optimised when in this mode. |
| ⊞ | Click the **Cards View** icon to change the way in which the search results are displayed.<br><br>This icon is only available in the **MyPortal 360View** page. |
| ▦ | Click the **Report View** icon to change the way in which the search results are displayed.<br><br>This icon is only available in the **MyPortal 360View** page. |
|  | Click the **More** icon at the top of a details page to display more links that you can use to navigate to different regions. |
| 📅 | Click the **Calendar** icon to select the date you want from the pop-up calendar that appears. Alternatively enter the date using your keyboard. |
| 🔍 | Click the **Open Search Page** icon to open a secondary form where you can enter your search criteria. |
| ☷ | Click the **Select List** icon to select the item you want from the pop-up list that appears. |
| ⚙ | Click the **System Menu** icon to a view drop down list from which you can perform the following actions:<br><br>    **Preferences** - The **Display Preferences** page will open, and you can set your user preferences for the system.<br><br>    **Help** - The online help homepage will open where you can search for further information.<br><br>    **Password** - The **Change Password** form will open, and you can change your password for the system.<br><br>**Log Off** - You will be logged off the system. |
| XLS | Click the **Excel** icon to export the records held within the region to your computer as an Excel document. |
| + | Click the **Add Row** icon to add a new row to a form in a wizard. |

| | |
|---|---|
| | Click the **Remove this row** icon to remove a row from a form in a wizard. |
| * | This icon denotes a mandatory field where information must be entered before a task can be completed. |
| | Click the **Reset** icon to reset your selections back to the default settings. |
| > | Click the **Move** icon to move your selection to another area. |
| >> | Click the **Move All** icon to move all your selections to another area. |
| < | Click the **Remove** icon to remove your selection. |
| << | Click the **Remove All** icon to remove all your selections. |
| | Click the **Top** icon to move your selection to the top of the list. |

There are five types of errors:

| Type of Error | What this means |
|---|---|
| E – Error | Action needed to be taken to continue process |
| I – Information | For information |
| Q – Question | Likely to be a mandatory field |
| V – Validation | For information |