

Shared Services User Guide

Contents

Contents	2
1. Creating and Maintaining Applications	3
1.1 Creating a New Application	
1.2 Application Details Subpage	
1.3 List Entry Details Subpage	5
1.4 Involved Parties Subpage for Applications	6
1.5 Transfer Applicants	
1.6 Correspondence Details Subpage	
1.7 People Addresses Subpage for Creating Applications	
1.8 Update an Application	
2. Additional Application Information	17
2.1 Answering Application Questions	
2.2 Outstanding Application Questions	
2.3 Lettings Area Question	
2.4 Update the Application List Entry Status	22
2.5 Notepads	
3. Updating the Household	
3.1 Adding Household Members	
3.2 Removing Household Members	
3.3 Changing The Main Applicant	27
4. System Icons	



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.
- 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.

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Housing					
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🗞 Allocations 🗸 🗸	Please Select x Y	and Please Select	* ~	Search Clear Count	
Applications					
Voids Available for Offer Offers	Applications			Create 🗐 🕥	(1)
Nominations	No data found				
	3. Click Create ≣ Select	Create Applic	cation	from the dropdown lis	st.
Ap	pplications			Create ③ ①	
				Create Application	
				Facilities:	
				Confirm a Change of Tenancy	
				Authorise Stage Decisions	

4. The Create an Application wizard appears.



1.2 Application Details Subpage

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My	•		•	•	•	•		•	
Му	Application D	etails	List Entry Details	Involved Parties	Correspondence Details	People Addresses	Homel	ess Details	
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Applic	Application								
Voids	Received Date * 16-May-2023				Select All				
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	GGS	Garage	Ground Site						
Reregi									

- **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

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Offer: Nomi	Rehousing List	Category	Category Start Date	List	t Status	Area Office	
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	ments						_
Place	ment Invoices						
	vice Housing Applications						

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



Search

1.4 Involved Parties Subpage for Applications

										0	0 0
App	lication Details List	Entry Details Involv	ved Parties	Correspondence	Details	People Addre	25565	Home	eless Details		
Person Name	Date of Birth	Sex	Relationship	Main	Joint	Living Apart	Rehouse			н	lousehold
	e,	₩	× ×						Update		e ⁿ
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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**

						,
vanced Search	Quick Search	Last Query				
Person Details						
Person Ref			Check Former Names			
Surname			Forename			
Surname Prefix			Initials			
Tenancy Ref		B _k Application R	ef Es,	Account Ref		e,
DoB		Tit	e Please Select x ¥	Gender	Please Select	~
NI Number			Alternative Ref			
Language	Please Select	× ~	Marital Status	Please Select		× ×
Telephone Number			Contact Value			
End Reason	Please Select	✓ End Date Betwee	n 🛱	and		ŧ
Current Person	Yes No All		Current Tenancy	Yes No All		
Current Application	Yes No All		Exclude Duplicates	Yes No		

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



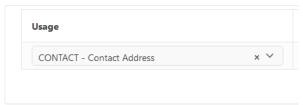
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Void E	OAP			Disabled			
Reregi							
Placen							
Placen						Next	Cancel

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.

Person Details Addresses Contact Details Other Fields Netspads Vage Address Start Date Contact Name V Ba EB E	0 0 0					n	Create Person
					Addresses	•	
→ E, E		Contact Name		Start			Usage
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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.



Addresses			0	0	\otimes
Advanced Search	Quick Search	Last Query			
 Search Criteria 					
Sub Building					
Building Name					
Building Number					
Sub Street					
Street					
Locality					
Town					
Area					
Postcode					
				_	
		Search New Query	Count	Car	icel

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

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e-5	Servic	e Housing Applications								

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.

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Visits						1 - 1
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13. Click on the button to add any Other Fields and Notepad details if required or click on the 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 <u>Select</u> 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.

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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

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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 .



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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 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.



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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.



- Select More from the Blue Banner at the top of the page then Notes.
 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.

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Housing		Maintain Application Details More Application Details										
My Business Flows	• Search	Assess an Application									Q	¢
★ My Favourites		Assess and View an Application								_		
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Applications		Update Tenancy Reference for an Application Update Application										_
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Visits		Create ICS Request	16-May-2023			N	N	N		NEW	к ^и	
Appeals		Placements										1-1
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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.

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.

				Questions						
Cat	Group	Parent	Question Reference	Description	Туре	Answer	Required	Remove Children		
	HRP	N	41	Do you require ground floor accommodation?	Y	Please Select V			2	л

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:

 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.



0													
Q~		Ge	Actions ~										
	=	List	Category		Start Date	Status	Reason	Area Office	HHold	Gen	Act	on	
	=	TR	TENANT		26-NOV-2018	UE		CENTRAL			N	N	ĸ ⁿ
													1-
Jestions													
Questio	ins Search												
	Othersend Ot	lanara (Di										Create =	0 0
uestion	s OAnswered Ou	Jnanswered ®A	Л									Create	0 (
Question	s OAnswered OL		II Ge Actions∨									Create	0 (
	s OAnswered OU		Go Actions ∨										0 (
				Req	Question Reference	Description					An	Create =	
			Go Actions ∨	Req	Question Reference 35		a ousehold members living togs	ether!			An		0 (
Qv	•	Cat	Ge Actions → Par None	N	35	Are all the h	ousehold members living tog						2
Q.~	-	Cca CC CC	Go Actions ~ Par None None	N Y	35	Are all the h How many i	ousehold members living togs bedrooms are available for you						2
Q.~	•	Cat	Ge Actions → Par None	N	35	Are all the h How many i	ousehold members living tog						2
Q.~ h	-	Cca CC CC	Go Actions ~ Par None None	N Y	35	Are all the h How many I What type o	ousehold members living togs bedrooms are available for you	ur use?					2
Q~ 4 4	•	Cat CC CC CC	Go Actions ~ Par None None	N Y Y	35 15 31	Are all the h How many 1 What type o If you live in	ousehold members living tog bedrooms are available for you of property do you live in?	ur use?					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.

estions	OAnswered OU	nanswered @	All				Create	0
Q~			Ge Actions ∨					
	=	Cat	Par	Reg	Question Reference	Description	Answer	
h.	=	cc	None	N	35	Are all the household members living together?		×
h	=	сс	None	Y	15	How many bedrooms are available for your use?		×*
h	=	cc	None	Y	31	What type of property do you live in?		e ⁿ
h.	=	сс	None	N	32	If you live in a flat or malsonette, which floor are you on?		e ⁿ
h.	=	HR	None	N	44	What type of property do you want?		× ⁿ
h	=	HR	None	Y	53	How many bedrooms do you require?		e ⁿ
h	=	HR	None	N	41	Do you require ground floor accommodation?		***
h.	=	HR	None	N	42	Does any member of the household use a wheelchair?		к ⁸
	=	HR	None	N	98	If rehoused take account of pets/(put in Additional Details)		**
	=	HR	None	Y	43	Do you require a garden?		$e^{i\theta}$
		GA	None	N	23	If a medical priority has been awarded, what is the priority		

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

■ NEC Housin	g		~		Q	NEC 🕸
Housing		Page History - Applications				
My Business Flows		All	Business Flows	List Entries	Involved Parties	More 🔺 🔳
★ My Favourites		Lettings Areas	Medical Referrals	Notes	Homeless Instances	
S Allocations		Points	Position	Offer History	Placement Hist	
S Allocations	Ť	Properties	Interested Party Usages	Address Usages	Appointments	
යි Estates	~	Visits	Choice	Bypassed	Questions	

2. Use the Maintain ≣

drop down list on the Region header bar to select

. The lettings area hierarchy is displayed on the left of

the p	age.
-------	------

NEC Housing		Update Lettings Area Choices		9 i ×		NEC 🕸
Housing	Page History - /					
My Business Flows		•	•		More 🔻	≡
★ My Favourites	💌 Mainta	Lettings Areas	Additional Details			0
S Allocations	Appli	What areas would you like to live in				
☆ Estates	~					
🖾 MyPortal	Applicatio			Select Unselect		
🚘 Rents	- Te Homele					
Planned Maintenance	Nomin Accourt	ANY-Root lettings Area				
A Housing Advice	~	BEARSDEN-Bearsden No preference				
 Housing Initiatives 		MILNGAVIE-Milngavie No preference				
		LENNOXTOWN-Lennoxtown No preference				
Customer Services	× .	MIL OF CAM-Milton of Campsie No preference				
	× .	TORRANCE-Torrance No preference				
Private Leasing	~ • Letti	TWECHER-Twecher No preference			eate	0 (1)
	• Lett	B WALERSIDE-Waterside No preference				
Property Lifecycle	No data fo					
A Valuations	V Tep	KIRKIE-Kirkintilloch No preference				
♀ Property Purchase		KIRKIEHH-Kirkintilloch/Hillhead				
eServices	~		N	lext Cancel Save		
CRM	v .					

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 button allows optional code, text, date or comment to be recorded.



=	NEC Housing			Update Lettings Area Choices		() i ()		NEC 🕸
۲	Housing		Page History - 7					_
÷	My Business Flows			•	•		More 💌	=
*	My Favourites		 Mainta 	Lettings Areas	Additional Details			() (i
ৎ	Allocations	~	Appli	What areas would you like to live in				
ଇ	Estates	~		N KIRKEHH				
52	MyPortal	~	Applicatio			Select Unselect		
盦	Rents	~	Te Homele					
	Planned Maintenanc	e~	Nomin	TWECHER-Twecher No preference				
ጱ	Housing Advice	~	Accourt	WATERSIDE-Waterside No preference				
\odot	Housing Initiatives	~		BBRIGGS-Bishopbriggs No preference KIRKIE-Kirkintilloch No preference				
ø	Customer Services	~		KIKIE HIKIKIKI KIKIKI KIKIKIKI KIKIKIKI KIKIKIKIKI KIKIKIKIKI KIKIKIKIKIKI KIKIKIKIKI KIKIKIKIKI KIKIKIKIKI KIKIKIKIKIKI KIKIKIKIKIKI KI				
ି କ	Support Services	ς.		11B AREA 1-11B Area 1				
				a 11C AREA 2-11C Area 2				
Ľ	Private Leasing	Ť	• Letti	11D AREA 3-11D Area 3			reate 🗮 Maintain 🗮	? i
C	Property Lifecycle	~	No data fo	 n 11E AREA 4-11E Area 4 n 11F AREA 5-11F Area 5 				
dр	Valuations	~	Тор	a TTE AREA 5-TTE Area 5 a 11G AREA 6-11G Area 6				
				a rid value or rid view o				
-	Property Purchase							
	eServices	~				Next Cancel Save		
ត	CRM	~						$\hat{\mathbf{O}}$

- 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 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.



æ	Housing	age History - Applications
	My Business Flows	All Business Flows List Entries Involved Parties More *
*	My Favourites	Maintain Application Details ①
9	Allocations ~	Application Ref 5170 Received Date 16-May-2023
ଜ	Estates	Status NEW Name
52	MyPortal ~	Application Address 26 Kilsyth Road, Kirkintilloch, Glasgow, G66 1KR 26 Kilsyth Road, Kirkintilloch, Glasgow, G66 1KR
盦	Rents	Tenancy Ref Notepad N Homeless Details N Offer Flag N
•	Planned Maintenance ~	Nomination Flag N Rent Account Details Account Balance 0.00 CR/DR
ቋ	Housing Advice	
Ø	Housing Initiatives	
Ş	Customer Services	
ን	Support Services	
Ø	Private Leasing	Create ⑦ ①
O	Property Lifecycle	Q v Update Application List Entry Status Go Actions v
44	Valuations ~	Update Application List Entry Update Category Start Date Status Reason Area Office HHold Gen Act Off
	Property Purchase 🔗	L ■ REGISTER R.LOCAL 15-May-2023 UE - ALLOCOFF N N w ⁷
	eServices ~	

4. The Update List Entry Status wizard appears below.

		Additional Details
Application Ref 5170	List Code REGISTER	
List Status * UE - under entry × V	Status Reason Please Select	
Status Start	Status Review	

- 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.



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.

List En	ntries											Create	i Ø	0
Q	× .		Go	Actions Y										
		=	List	Category	Start Date	Status	Reason	Area Office	HHold	Gen	Act	off		
h		=	TR	TENANT	26-NOV-2018	UE		CENTRAL			N	N	к ^я	
		Copy List Entry											1-	- 1
		Update Application	List Entry Status											
Que	stions	Update Application	List Entry											
Letti	ings Are	Update Category Sta	irt Date											
Stag	e Decisi	Context Reports												

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.

Notes			
Notes Search			
Notes @Current OAll		Create 🗏 ⊘ (0
		Create Notepad Entry	ty .

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.

Create Notes		0 0 8
Text		
Туре		
Please Select	x ~	
Highlighted	Current	
		Cancel Save

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.

\~		Ge Actions ⊻											Involved R
	≡ Pc	erson Name	Sex	Age	Relationship		Start Date		End Date	Group	Room		
	≡ м	Ir Alan Partridge	м	63	APPL		25-APR-201	8		1			e ⁿ
	≡ M	Irs Jan Partridge	F	47	PART		25-APR-201	8					e ⁿ
atel	nvolved Party										0 (D 🛛	
	,											- U	
		•											
		Involved Party	r					Que	stions				
	Person Na	ame										E.	
	Contact Add	ress 25 Huddersfield Road, Montgom	iery Estate, First To	own, FH3 7GG									
	Date of B	lirth			#		Gender	Please Se	lect			~	
	Geographic Or	igin Please Select			~		Ethnic Origin	Please Se				~	
	Relations				~		Start Date *	25-APR-201				ŧ	
	Joint Applicant Indica			Living	Apart Indicator			Reh	nousing Required Indicator	~			
	Required Bedroom Group Correspondence Name	-				Curre	nt Bedroom Usage						
	Emplo												
		Dap					Disabled						
	Langu	age Please Select			~		Nationality	Please Se	lect			~	
	Sexual Orientat	tion Please Select			~		Religion	Please Se	lect			~	
	Marital Sta	Itus Please Select			~		Person NI Number						

The Person Search must be carried out before any person can be added to

an application. Use the search icon \mathbb{E} to go to the search page and create the person as per Section 1.3.5 above if the person does not already exist.



inced Search	Quick Search	Last Query							
Person Details									
Person Ref				Check Former Name					
Surname				Forename	2				
Surname Prefix				Initial	5				
Tenancy Ref		8,	Application Ref	e,		Account Ref			E
DoB		=	Title	Please Select x ×		Gender	Please Select		~
NI Number				Alternative Re	F				
Language	Please Select		× ~	Marital Statu:	Please Select				× V
Telephone Number				Contact Value	2				
End Reason	Please Select	~	End Date Between	Ē		and			Ē
Current Person	Yes No All			Current Tenancy	Yes No	All			
Current Application	Yes No All			Exclude Duplicate	Yes No				
Address Details Other Fields									

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.

Q~		Go	Actions 🗸		
	Person Details	Person Nar	ne	Sex	
ia.	End Involved Party	Jan Par	tridge	м	
	Update Involved Party	·			
11	Update Person	Mrs Jan Par	tridge	F	
	Context Reports				
An Involved Party					0 0
rson Name			Contact Address		E
rs Jan Partridge te Of Birth			25 Huddersfield Road, Montgomery Estate, First Town, Newshire,	FH3 7GG	6
-AUG-1971			Relationship PART		
rt Date			End Date		
-APR-2018			1		Ē
			Correspondence Name		
d Reason *		× ~	MR AG PARTRIDGE		

≣



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.

Involved Pa	arties							Create	■ ⑦ ①
Q.~	Ge Actions ⊻								
	Person Details Person Items	Sex	Age	Relationship	Start Date	End Date	Group	Room	
4	Change Main Applicant For Application Update Involved Party	м	63	APPL	25-APR-2018		1		$\mathcal{C}_{i,i} = \{i,j\}$
4	Update Person Discuss Persona	F.	47	PART	25-APR-2018				2
	Context Reports								1 - 2

Current Applicant			
Mr Alan Partridge			
End Date		End Reason	
		Please Select	× ~
New Applicant		Correspondence Name	
Please Select	× ~	MR AG PARTRIDGE	
Employer			
NORTH NORFOLK DIGITAL			
Oap		Disabled	
Language		Geographic Origin	
Please Select	к ∨	WHITE - white	х∨
Ethnic Origin			
BRITISH - british			x ~
Nationality			
UK - uk national resident			* ~
Sexual Orientation			
NS - not stated			x ~
Religion			
CRST - christian			x ~
Person NI Number			

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



4. System Icons

lcon	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 rec- ord.	
►	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.	
× ^٦	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.	
i1	Click the Select this record icon to select the record in the corre- sponding row to display associated child regions.	
Q	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.	
2 (?)	Click the Help icon to open the online help topic relating to the page, re- gion or form you are using. The help button appears in the top banner or footer.	
(i)	Click the Help About icon to view further information about the region or form you are currently in.	



\otimes	Click the Cancel icon to close the region, form or screen you are in with- out 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.
Ē	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 re- sults are displayed. This icon is only available in the MyPortal 360View page.
⊞	Click the Report View icon to change the way in which the search re- sults are displayed.
	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.
Ħ	Click the Calendar icon to select the date you want from the pop-up calendar that appears. Alternatively enter the date using your keyboard.
Ē	Click the Open Search Page icon to open a secondary form where you can enter your search criteria.
8 <u>—</u>	Click the Select List icon to select the item you want from the pop-up list that appears.
袋	Click the System Menu icon to a view drop down list from which you can perform the following actions:
	Preferences - The Display Preferences page will open, and you can set your user preferences for the system.
	Help - The online help homepage will open where you can search for further information.
	 Password - The Change Password form will open, and you can change your password for the system. Log Off - You will be logged off the system.
لے 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 wiz- ard.
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 set- tings.
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