Homelessness User Guide

Contents

1. About NEC Housing Homelessness

1.1 Introduction

This session will give you an overview of the main functions of Homelessness and reviews the links between the NEC Housing product areas.

1.2 Objectives

At the end of this session, you will be able to:

- Understand the role of Homelessness in NEC Housing
- Recognise the links between the NEC Housing product areas

1.3 Main Functions of Homelessness

The Homelessness within NEC Housing is designed to hold information regarding homelessness.

This area covers the following aspects:

- Enter and maintain applications.
- Complete homeless decisions.
- Offers of hostel accommodation.
- Maintain offers.
- Visits.
- Record and maintain appeals.

1.4 Logging in to the NEC Housing System

To log in to the NEC Housing system, do the following:

1. Navigate to the NEC Housing site.

   Tip:
   If you do not know what the URL is for the **NEC Housing Login** page, please contact your system administrator.

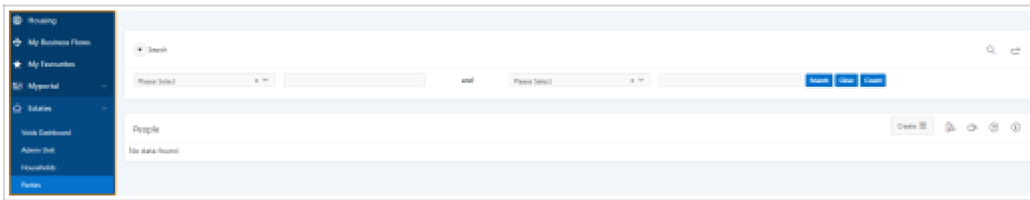
   The **NEC Housing Login** page appears.

2. Enter your Username and Password.

   Tip:
   If you do not know what your username is, or have forgotten your password, please contact your system administrator before proceeding further.

3. Click **Login**.
   You are now logged in to the NEC Housing system.

Info:
The default page that appears depends on how your system has been set up.

2. Homeless Applications

2.1 Key Terms

Rehousing List

The waiting list on which the applicant is to be included and defines the questions to be answered e.g., General Needs Register, General Needs Transfer, Homeless Assessment Priority.

Application Category

An optional field used to sub-divide the rehousing list into groups; these can also be used to prioritise within short-lists e.g., under occupation, medical.

Qualification

An optional field, which identifies the reason an applicant qualifies for inclusion on the rehousing list e.g., families in flats, moving to work in area.

Household Type

A code to identify the household composition that is calculated by NEC Housing e.g., COUP12G could be a couple with 1 child needing 2 bedrooms on the General Housing List.

Application Status

The status of the application can be used to indicate if an application is active and should be included in the short-listing process e.g., NEW, CUR, HSD.

Reasons can be required with start and end dates, e.g., suspending applications when no response to letters.

Registered Date

The date the application is to be registered from. This controls when the application will be prompted for re-registration.

Physical Question

Questions with a direct response and which normally appear on an application form, e.g., 'What your present address, what are your circumstances??'.

Derived Question

Questions, the answers to which are calculated from other information and would not normally appear on an application form, e.g., 'How many years on the waiting list?'.

Parent/Child Questions

Questions can be linked together in a parent/child relationship. Only if the parent question is answered are you prompted to answer the child question.

For example, 'Parent = Do you share any facilities?', answer Y then, 'Child = Do you share a kitchen/toilet/bathroom etc.?'.

Question Category

Questions are grouped together in categories. These are defined by NEC Housing, e.g., current circumstances, housing requirements, area preferences.

Question Group

Every question must be in a group belonging to a category and these are used to group together questions which have a common theme.

All groups have a sequence so that they appear in the order you require

Question Sequence

All questions within their group have a sequence so that they appear in the order you require.

2.2 Creating Homeless Applications

Tip:

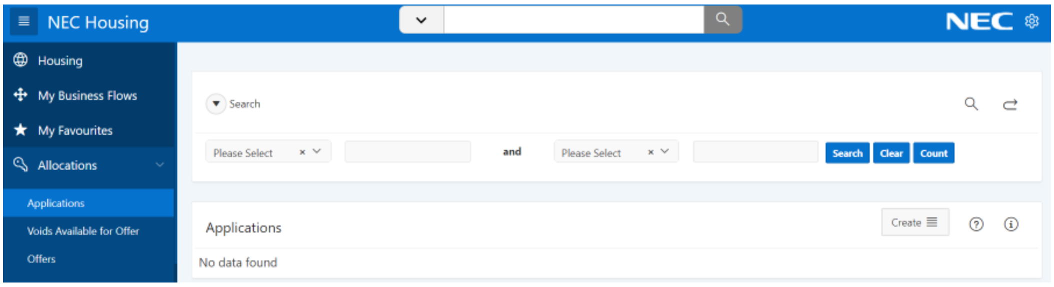
- Prior to creating a new application, it is good practice to search NEC Housing to see if one already exists. This can either be done via MyPortal, 360View or from the **Applications** summary page within the **Allocations** product area.

- If an application already exists you can use it to add the applicant onto the homeless list rather than creating a new application reference number.

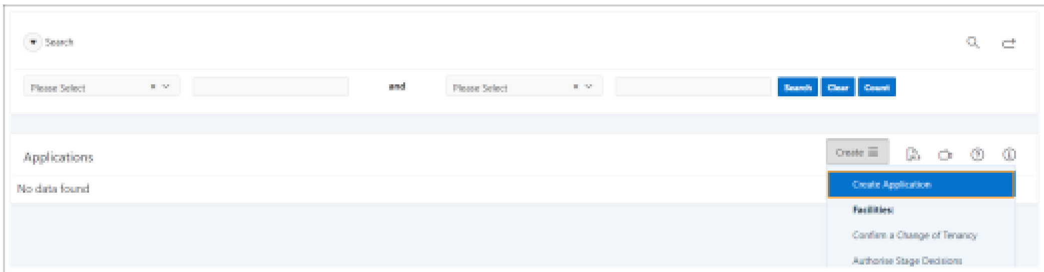
- If your organisation is using homeless instances, a new homeless instance can be created. If not, only one homeless list entry can be created for an application reference number.

To create a homeless application, do the following:

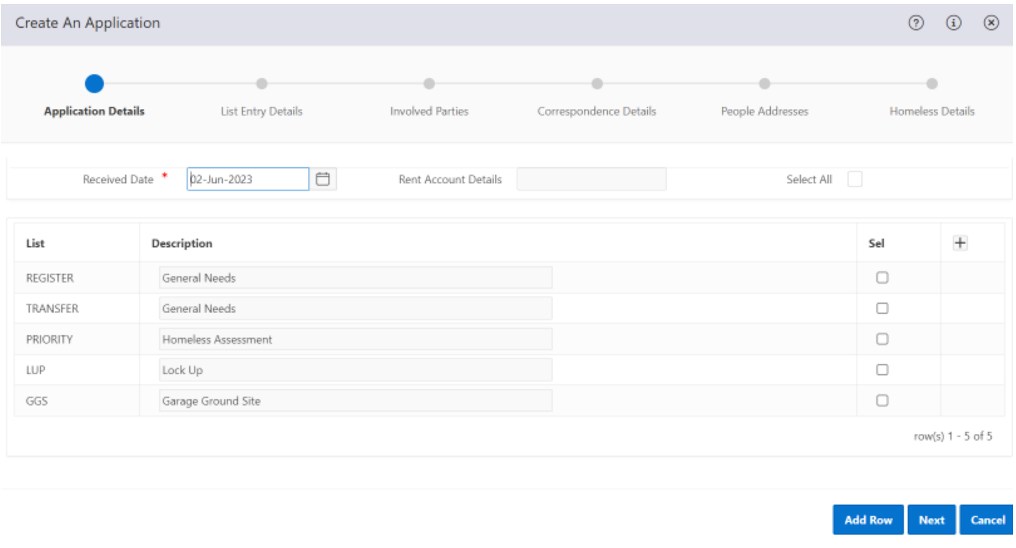
1. Click **Allocations**.
   The **Allocations** menu expands.
2. Click **Applications**.
   The **Applications** page appears.



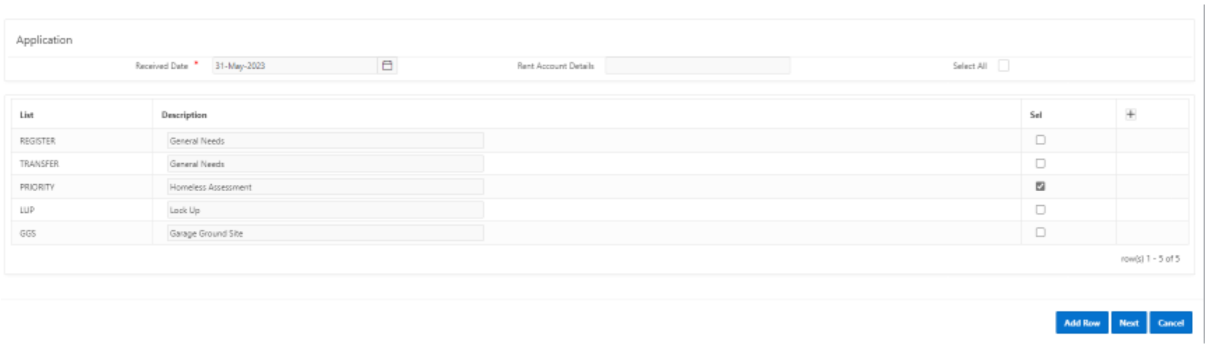
3. Enter your search criteria in the **Search** area.
   If the search options do not meet your needs, click the **Advanced Search** icon at the top of the **Search** area, and enter more specific criteria.
4. Click **Search**.
   The records that meet your search criteria appear in the **Applications** region.
   If there is no current application for the person in question, you can create a new one and then answer questions and enter other data in order that the application may be given an active status and, where necessary, assessed.
5. Select Create Application from the **Create** list at the top of the region.



The **Create An Application** wizard appears.

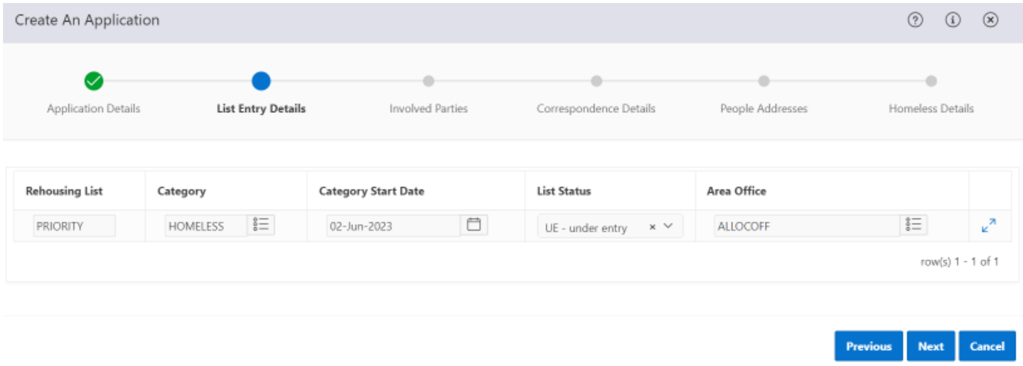


6. Do the following in the **Application Details** page of the wizard:



a. Enter the date the application was received. (This can be backdated)
b. Enter optional rent account details, such as the landlord/ account no.
c. Check the boxes corresponding to the lists you want to select.
d. Click **Next** to access the **List Entry Details** page.

7. Do the following in the **List Entry Details** page of the wizard:

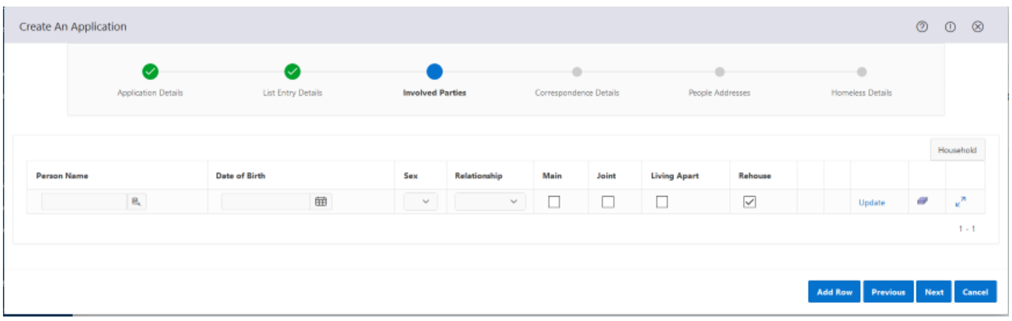


a. Select a category.

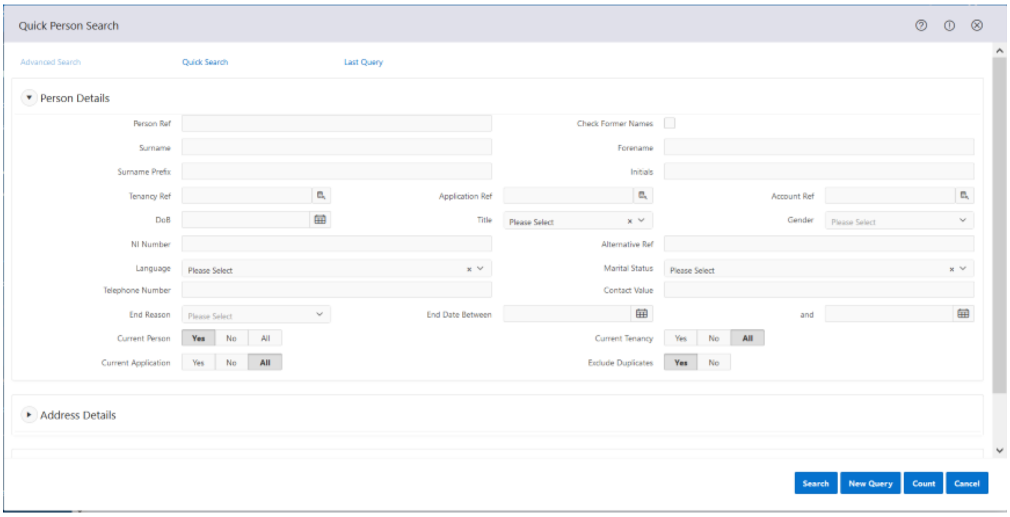
Note:
Depending on configuration to reflect your organisation's policy, not all rehousing lists will allow a category to be assigned.

b. Select a category start date where appropriate.
c. Amend the default status code of UE (Under Entry) where applicable, providing that the system allows.
d. Select an area office code.
e. Click **Next** to access the **Involved Parties** page.

8. Do the following in the **Involved Parties** page of the wizard:



a. Click the **Open Search page** icon in the **Person Name** field.



b. In the **Quick Person Search** form, do the following:

i. Enter your search criteria in the appropriate fields.

ii. Click **Search**.
The records that meet your search criteria are displayed.

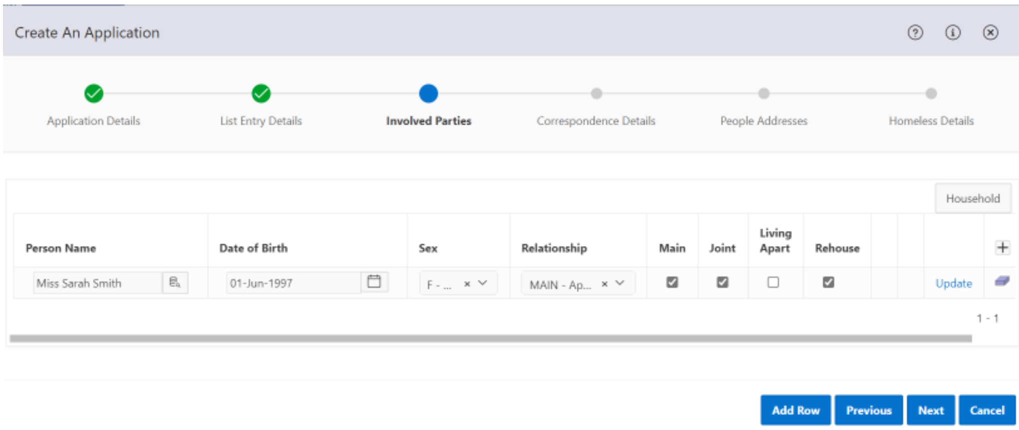
iii. Click **Select** corresponding to the person you want to add to the tenancy.

Tip:
If the person does not exist, click the **Create Person** button. This will launch the **Create Person** wizard. For further information on how to create a new person for an application, see Creating a Person.

You are returned to the **Create An Application** wizard and the details of the person you selected are displayed in the **Involved Parties** page.

9. In the **Involved Parties** page, do the following:

Note:
By default, the **Main**, **Joint** and **Rehouse** boxes will be checked for the first person added to the application. The **Relationship** field will also be configured by default. Other involved party default values can be changed.



a. Click the **Household** button to add the details of another household person if they exist.

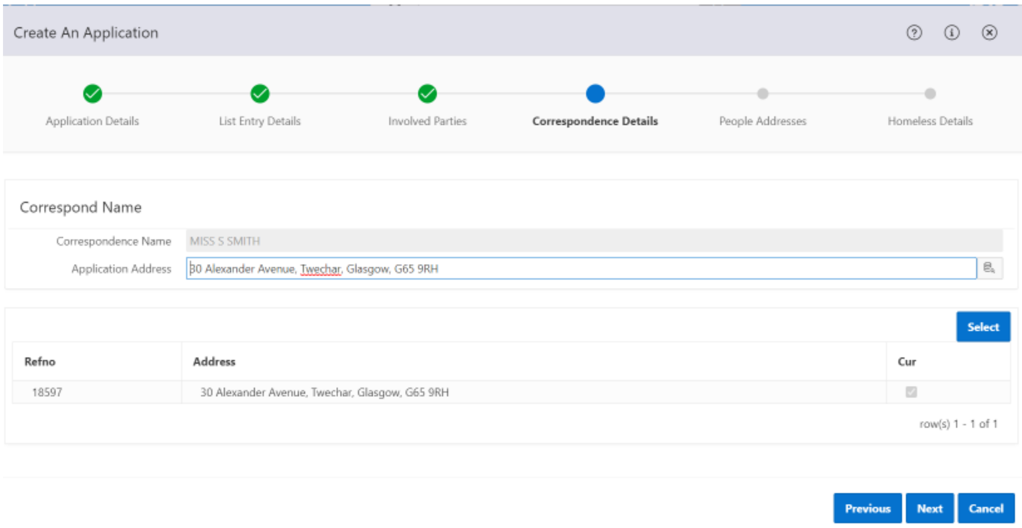
   Click the **Expand** icon against each person to reveal further information.

b. Click **Update** to check and update the person details, if required.

   Click **Add Row** to repeat the search to create or update the details of any remaining members of a household.

c. Click **Next** to access the **Correspondence Details** page.

10. Do the following in the **Correspondence Details** page of the wizard:



Note:

The **Correspondence Name** field is populated with the names, initials and titles of the joint applicants entered on the **Involved Parties** page.

If the application is for a transfer type rehousing list, the address associated with the tenancy will be populated by default.

a. For non-transfer applicants, click the **Open Search page** icon in the **Application Address** field.

   The **Addresses** search page appears.

11. In the **Addresses** search page, do the following:

a. Enter your search criteria in the appropriate fields.

b. Click **Search**.

The records that meet your search criteria are displayed.

c. Click **Select** corresponding to the address.

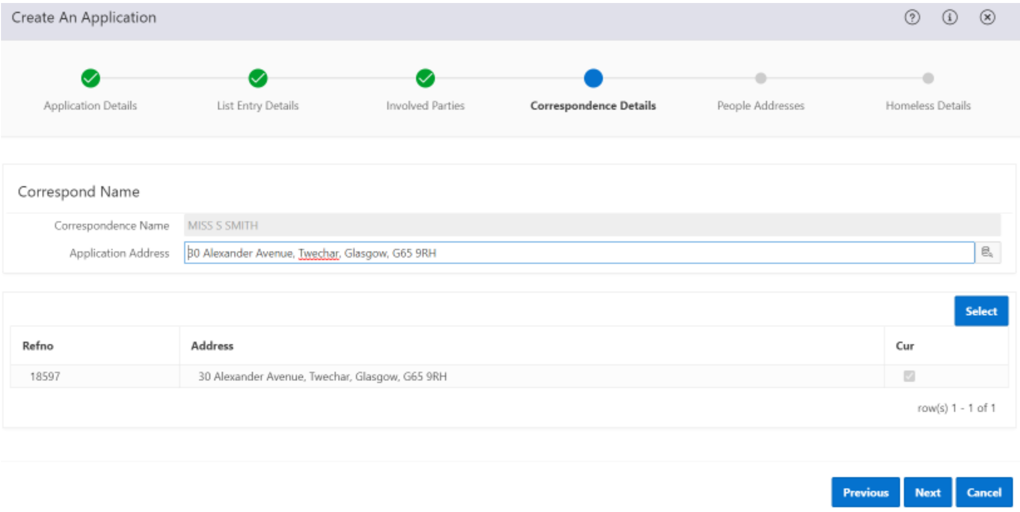
Tip:

If the address does not exist but the street does, click **Select** from the **Streets** region in the **Addresses** search page.

Any missing address data can then be entered and saved by clicking on the **Save** button.

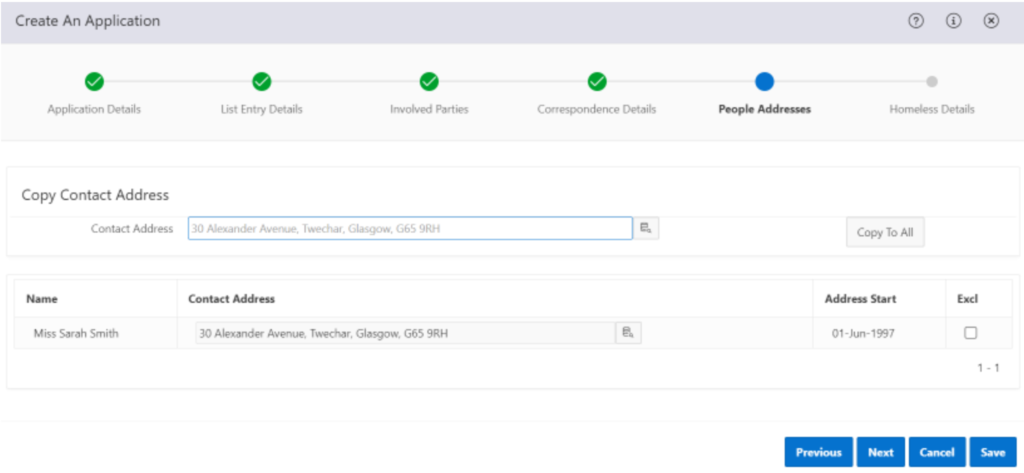
You are returned to the **Create An Application** wizard and the details of the address you selected are displayed in the **Correspondence Details** page.

12. In the **Correspondence Details** page, do the following:



a. Click **Next** to access the **People Addresses** page.

13. Do the following in the **People Addresses** page of the wizard:



Information:
Once an application address has been created, it will be defaulted as the contact address for the involved parties.

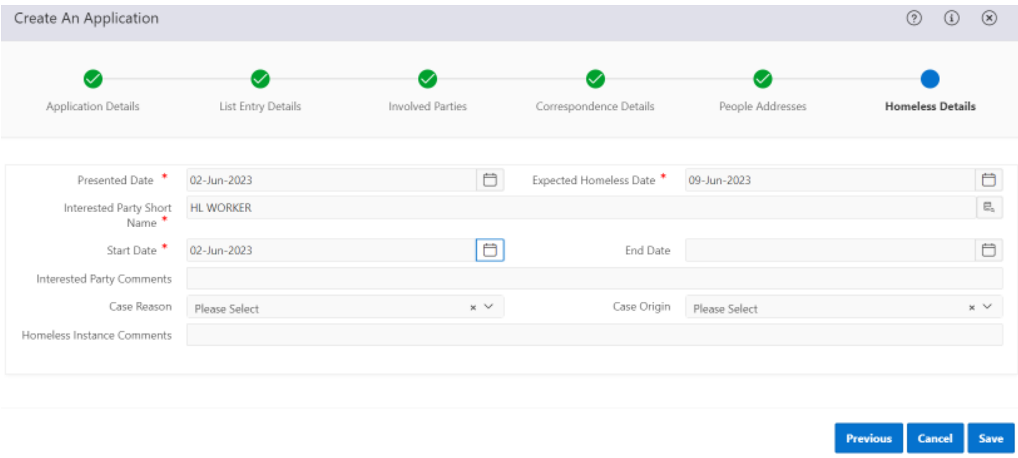
a. Click **Copy To All** to copy the application address to all involved parties. A default start date will be populated for all parties to which the address is copied.
Alternatively, you can search for and select addresses for individuals using the **Open Search Page** icon corresponding to the person.

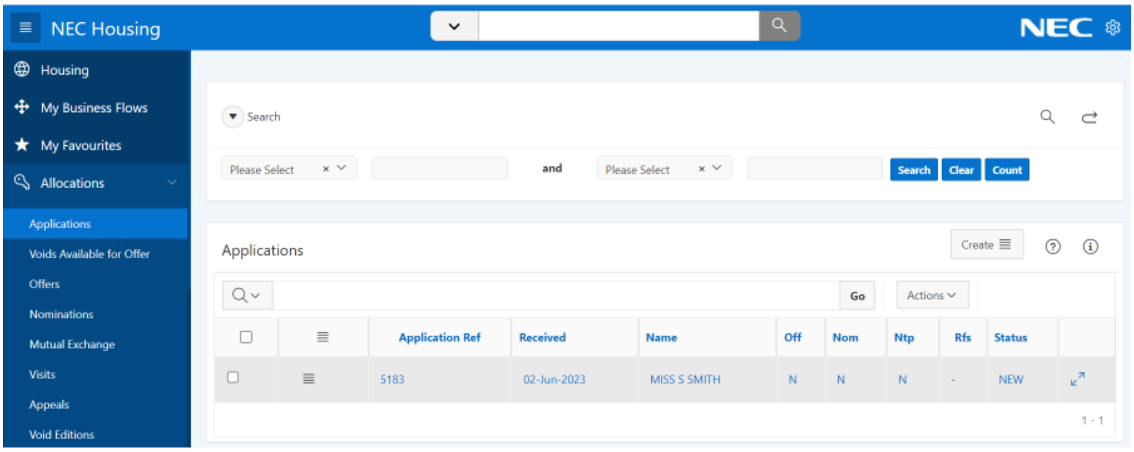
Note:
If any involved parties are to be recorded at another address, they may be excluded from the copy to all facility using the **Excl** tick box.

b. Click **Next** to access the **Homeless Details** page.

14. Complete the homeless details in the **Homeless Details** page of the wizard.
15. Click **Save**.
The new application appears in the **Applications** region.

The application has been created.





2.3 Additional Application Details

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

- Answers to questions
- Medical referrals
- Notepads

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 and assessed.

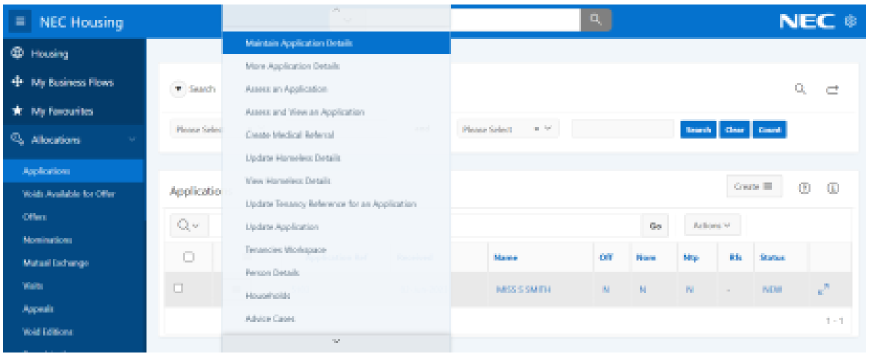
Homeless applications can have stages that represent the process considering a homeless application. These stages may also have questions associated with them and will also have an outcome to the stage which can set the status of the application and create an application for permanent housing.

Tip:

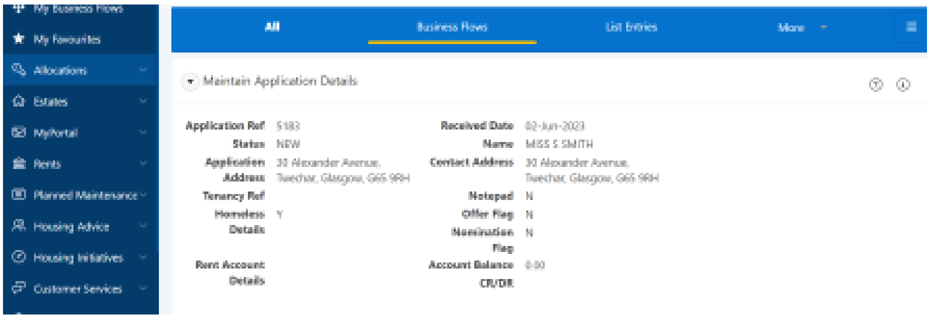
It is optional to record notepad entries and medical referrals.

To update and enter additional application information, do the following from the **Applications** summary page:

1. Enter your search criteria in the **Search** area.
2. Click **Search**.
   The records that meet your search criteria appear in the **Applications** region.
3. Select Maintain Application Details from the corresponding **Row Action** list ≡.



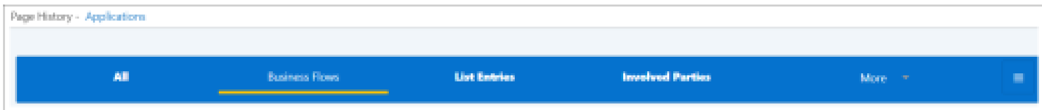
The **Application Details** page appears.



The menu that appears across the top of the page enables you to access the available regions.

Info:

The system displays the menu item in bold if corresponding region contains data.



2.4 How to Answer Questions

General questions, such as those relating to an application, can be answered within the context of the question as follows:

Yes/No

Questions requiring a yes or no answer 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 requiring a numeric answer may be answered by typing a numeric value in the answer field. Up to two decimal places may be entered.

Text

Questions that require a written answer may be answered by typing the answer directly into the answer field.

Coded

Questions that have optional answers may be answered by clicking the icon within the field to access a list of values. Where the list of codes is long, a pop-up window will provide a search facility. This can be used to limit the codes displayed to those whose code or description include the characters you enter in the search input box.

Date

Questions that require the answer to be a date can be answered by clicking the **Calendar** icon and selecting the appropriate date.

For any question where further optional details are required, the **Expand** icon at the end of the question row may be used to 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 child questions need to 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. Dependent 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** region from where they can be updated.

2.4.1 Homeless Instance Questions

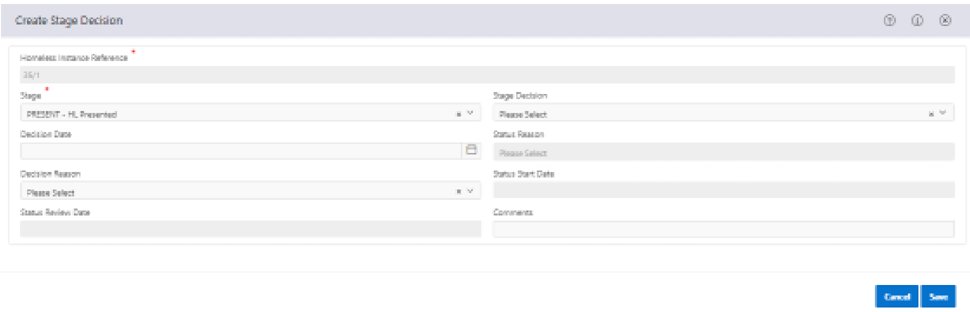
Homeless Instance Questions can only be answered once a Homeless Instance Stage has been created. To create a Homeless Instance Stage, then do the following;

1. Click the **Homeless Instances** link at the top of the screen.

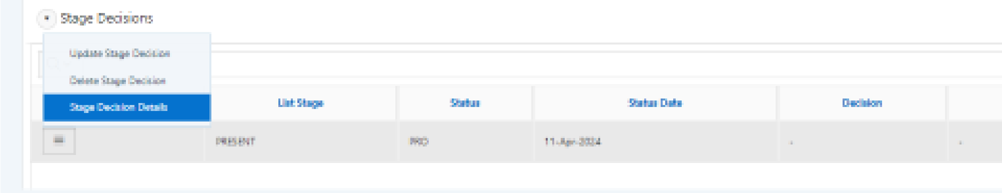
2. Scroll down page and select the **Parent & Child** at **Homeless Instances**.

3. Scroll down to **Stage Decisions**, select **Create > Create Stage Decision**.

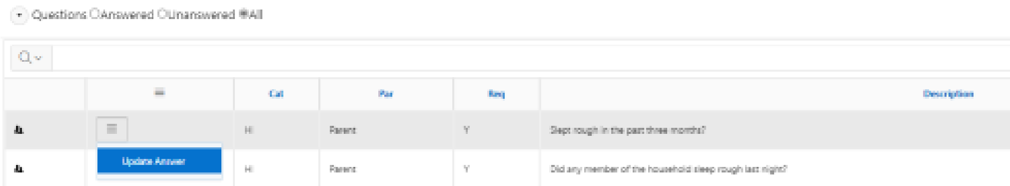
4. Populate the **Stage** and select **save**.



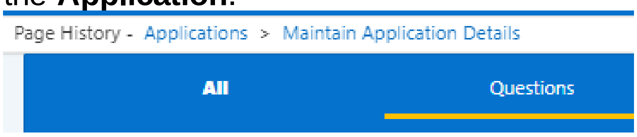
5. Select the row action button in line with the stage created, select **Stage Decision Details.**



6. Use the row action button > **Update Answer** to populate the answer field.

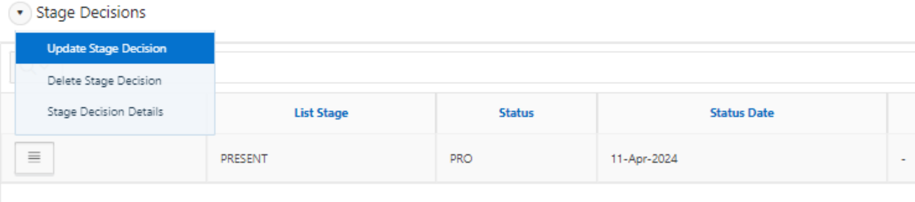


7. Select **Maintain Application Details** from the top left of page to take you back to the **Application**.

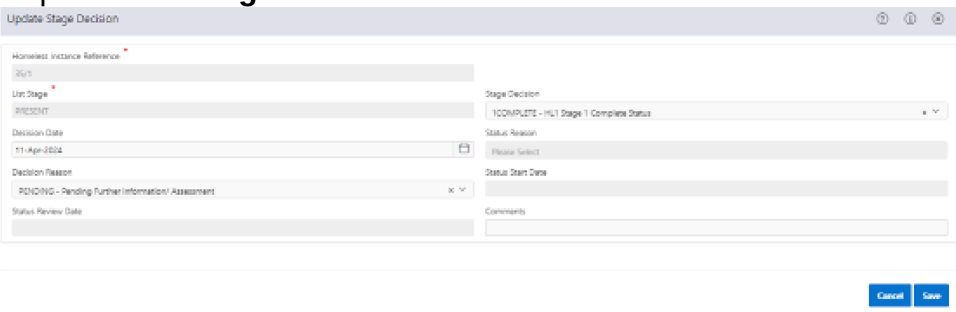


8. Select **Homeless Instance** from the link at the top of the screen, **Parent & Child**

the **Homeless Instance**. Go to the **Stage Decisions** and select the row action > **Update Stage Decision** against the current stage.



Populate the **Stage Decision** and **Decision Reason** and select **Save.**



9. A Stage, Stage Decision and Decision Reason **MUST** be created for **ALL** stages in the application; Present, Assessment, Outcome, HL3 – Stage 1 (HL3S1) and HL3 Stage 2 (HL3S2).

2.5 Updating Application List Entries

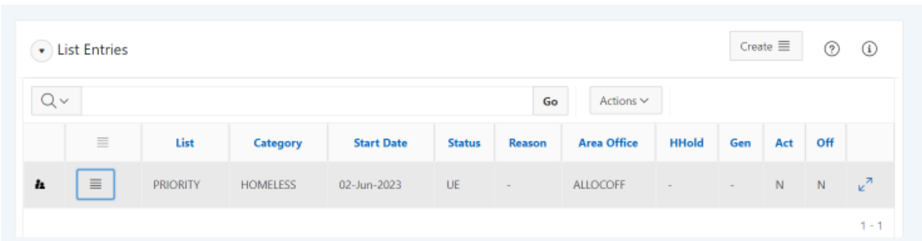
Making a homeless decision will often set the status of the application, however, the following instructions demonstrate how to do this if you need to amend the status for some other reason.

To update an application list entry, access the **Maintain Application Details** page, then do the following:

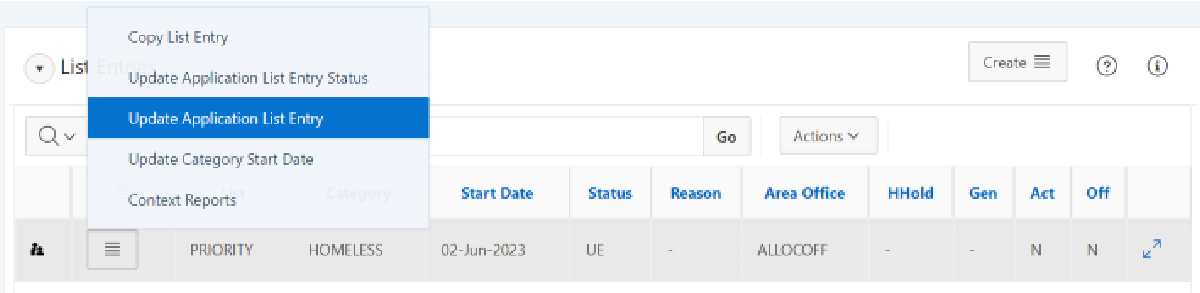
1. Click the **List Entries** link at the top of the screen.

Tip:
If this link is not visible at the top of the screen, click **More** ▼ to expand the menu.

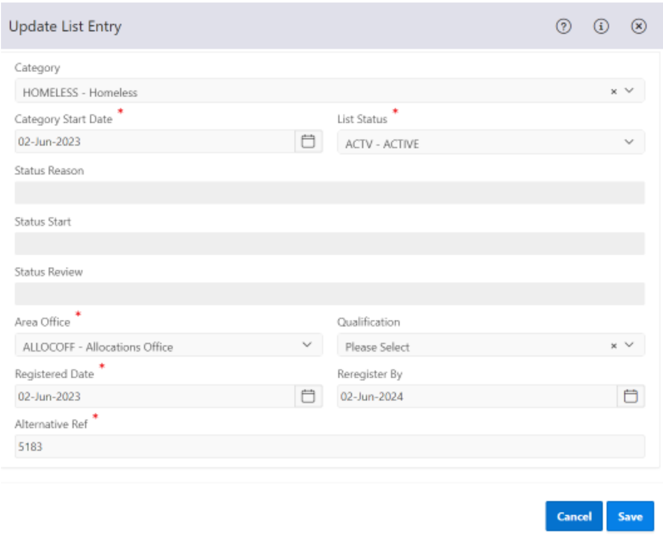
The system scrolls down to the **List Entries** region.



2. Select Update Application List Entry from the **Row Action** ≡ list corresponding to the record you want to update.



The **Update List Entry** form appears.



3. Enter the relevant data in the form.
   The precise data requirements will depend on the list entry chosen and the status you wish to assign.
4. Click **Save**.
   The form closes and you are returned to the **List Entries** region.

The changes you made to the list entry have been applied.

2.6 List Entry Questions

Questions are linked to a list entry to determine which rehousing list an application should be registered to.

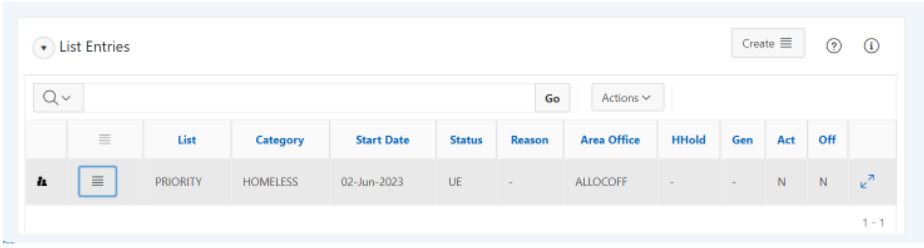
3.9.1 Updating List Entry Answers

To update answers for a rehousing list, access the **Maintain Application Details** page, then do the following:

1. Click the **List Entries** link at the top of the screen.

Tip:
If this link is not visible at the top of the screen, click **More** ▼ to expand the menu.

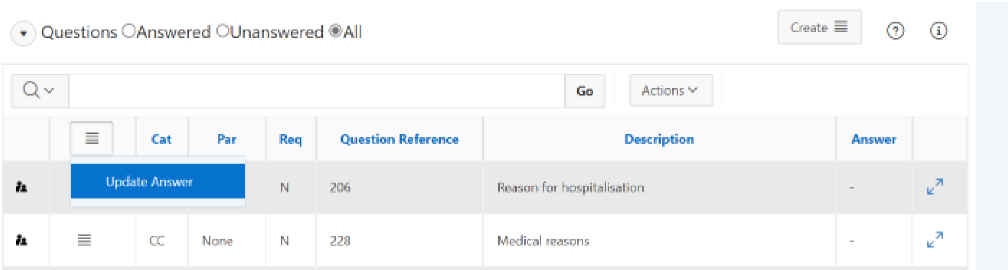
The system scrolls down to the **List Entries** region.



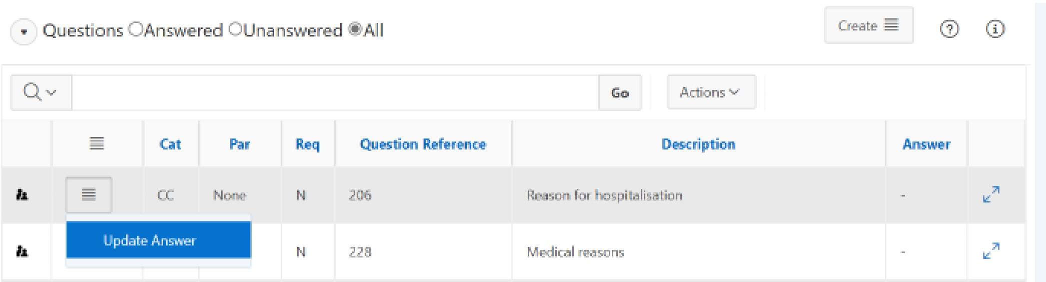
2. Click the **Select this record** icon in the row corresponding to the record you want to select.
   The **All Questions** option appears below the **List Entries** region.
3. Click the **Questions** option **Open** icon.
   The **Questions** region opens.

4. Select the appropriate radio button to filter the records displayed in the region.
   - **Answered** - to display all questions that have been answered.
   - **Unanswered** - to display all unanswered questions.
   - **All** - to display all questions.

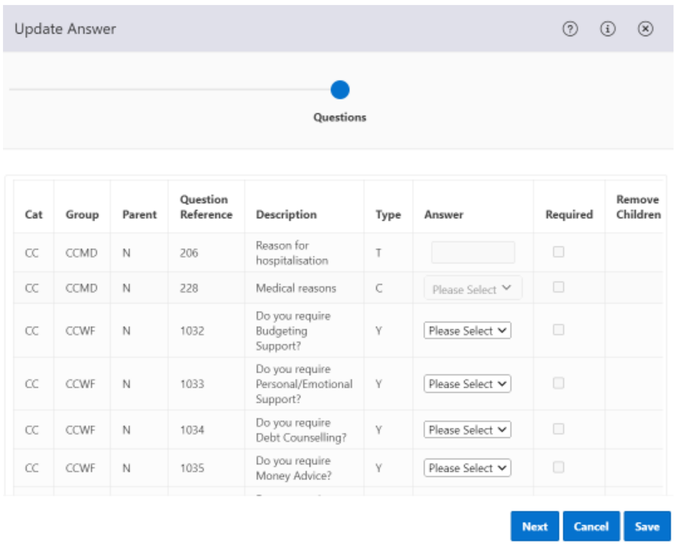
5. Do one of the following:
   - To enter the answers to all questions displayed, select Update Answer from the **Bulk Actions** list in the table heading.



- To enter the answer to a single question, select Update Answer from the corresponding **Row Action** list ☰.



The **Update Answer** wizard appears.



This will guide you through the associated questions, including any child questions where the parent question has been answered 'Yes'.

6. Enter the relevant data as described in the Update Answer Wizard.
   Page through the questions until the 'No further questions exist' message is displayed.

Tip:

Click the **Help** ⓘ icon at the top of the wizard for further information.

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7. Click **Save**.
   The form closes and you are returned to the **All Questions** region.

The changes you made to the list entry answer have been applied.

Note:
You will need to repeat this process for each list entry.

2.7 Outstanding Application Answers

After answers to questions have been saved any questions that have not been answered will be displayed in the **Unanswered Questions** region for the application.

Note:
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 can be assessed.

For homelessness applications it is also normal for homeless stages to be configured to mark the progress of the homeless application under the legislative procedure, the status of the application is usually set by the decision made at each stage of the process until a final decision is made under homelessness legislation.

The information for an incomplete application can be saved and the application given a non-active status until the missing information is complete.

2.8 Assess an Application

2.8.1 Online assessments

NEC Housing is configured to allow the ad-hoc, automatic assessment and re-assessment of applications. This involves the calculation of answers from derived questions, the assignment of household types, calculation of points and/or banding categories and the determination of the applicant's position on list for the various areas and property types of choice.

An overnight assessment of all applicants ensures that derived questions, which may pass information into other calculations such as household types to determine eligibility and priority, are kept up to date. NEC Housing also supports configuration to allow newly entered applicants to be assessed within 30 minutes of being given an active status.

2.8.2 Ad-hoc Application Assessment

Only applications with an active list status can be assessed.

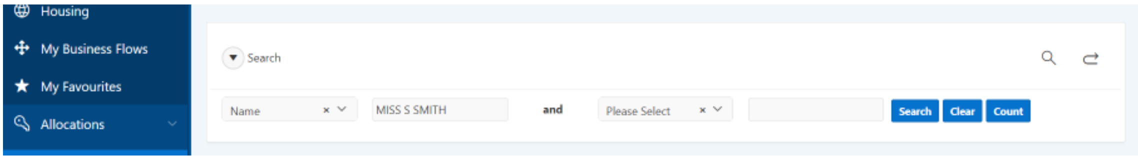
2.8.3 Assessing Applications

Note:
This task only applies to applications having a status of NEW or CUR.

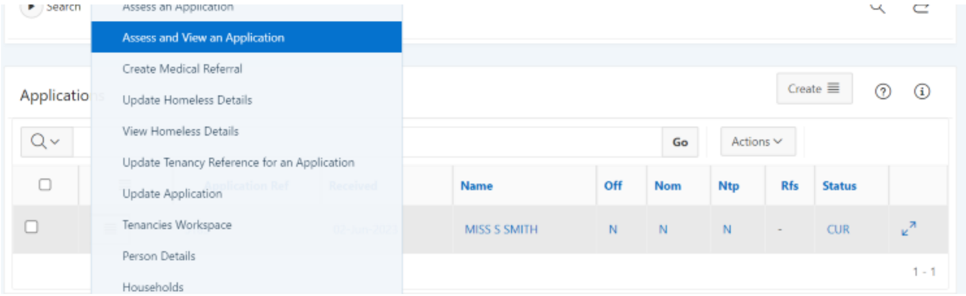
To assess an ad-hoc application, do the following:

1. Click **Allocations**.
   The **Allocations** menu expands.
2. Click **Applications**.

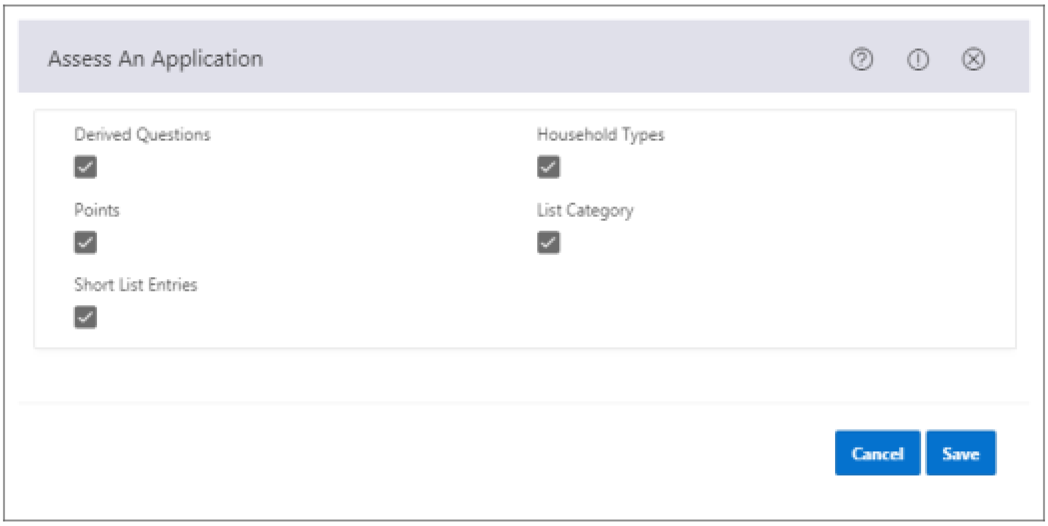
The **Applications** page appears.



3. Enter your search criteria in the **Search** area.
   If the search options do not meet your needs, click the **Advanced Search** icon at the top of the **Search** area, and enter more specific criteria.
4. Click **Search**.
   The records that meet your search criteria appear in the **Applications** region.
5. Select one of the following from the **Row Action** list corresponding to the record you want to assess:
   - Assess an Application
   - Assess and View an Application
     This option also enables you to examine the report that is generated in a new browser window for the operations selected.



The **Assess An Application** form appears.



6. Enter the relevant data in the form.

Note:
The **Derived Questions**, **Household Types**, **Points**, **List Category** and **Short List Entries** boxes are checked by default but can be unchecked as required.

7. Click **Save**.
   The form closes and a system message appears informing you that your job request has been submitted in GPI.

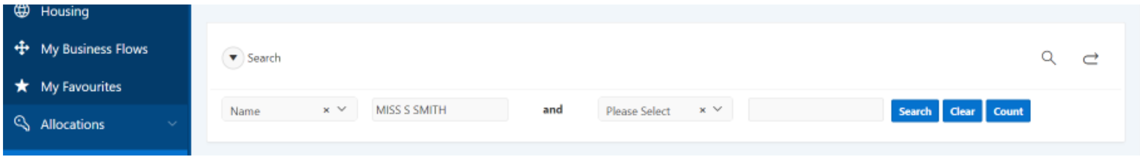
If you selected Assess and View an Application from the **Row Action** list, you will be able to examine the report that is generated in a new browser widow for the boxes you checked. When you are satisfied, close the report.

The changes produced by the assessment may, subject to configuration, include the assignment of a household type, points awarded, automatic list category/ banding and positions on lists.

2.8.4 Viewing Answers to Application Questions

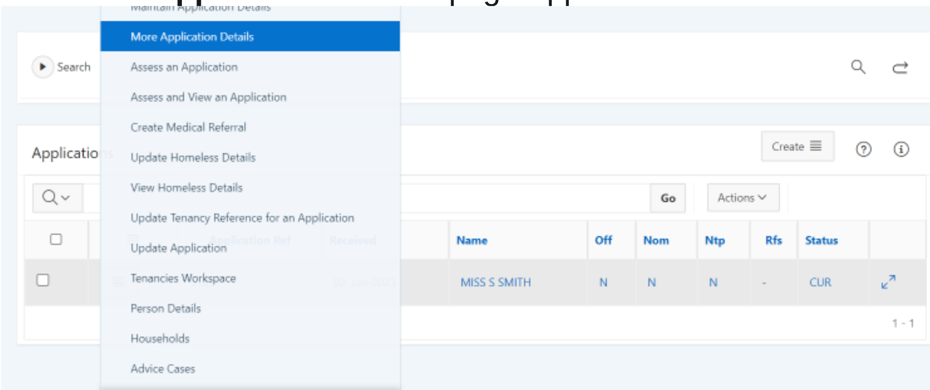
To view the answers to derived questions, do the following:

1. Click **Allocations**.
   The **Allocations** menu expands.
2. Click **Applications**.
   The **Applications** page appears.

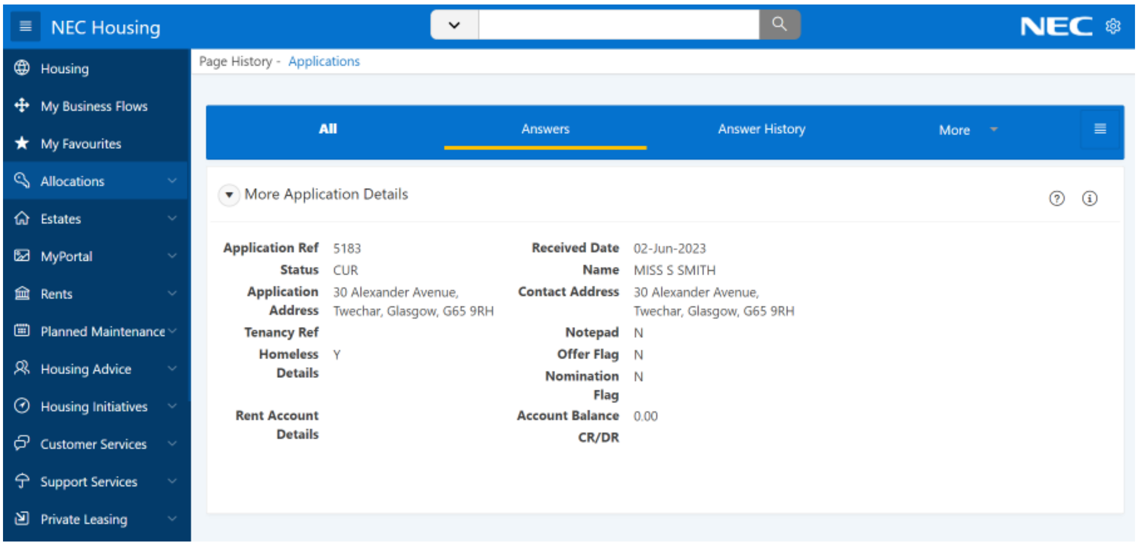


3. Enter your search criteria in the **Search** area.
   If the search options do not meet your needs, click the **Advanced Search** icon at the top of the **Search** area, and enter more specific criteria.
4. Click **Search**.
   The records that meet your search criteria appear in the **Applications** region.
5. Do one of the following:
   - To select multiple records, check the boxes corresponding to the records you require, then select More Application Details from the **Bulk Actions** list in the table heading.
   - To select a single record, select More Application Details from the corresponding **Row Action** list.

The **More Application Details** page appears.

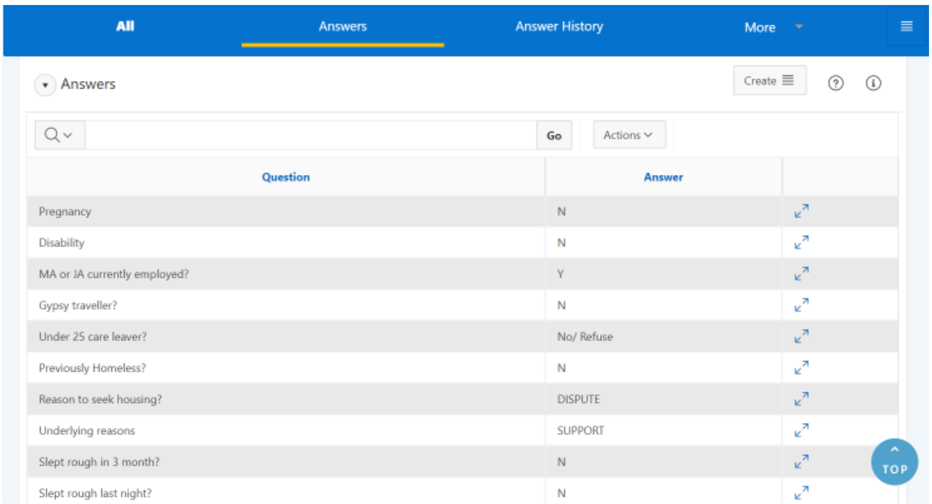


6. Click the **Answers** link at the top of the page.



Tip:
If this link is not visible at the top of the screen, click **More ▾** to expand the menu.

The system scrolls down to the **Answers** region.

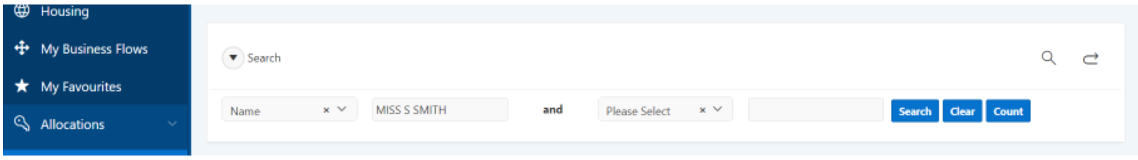


The answers to derived questions, together with the answers to any other questions which have been configured, are displayed in this region.

2.8.5 Viewing Household Type & Category Calculation, Points & Position

To view this information, do the following:

1. Click **Allocations**.
   The **Allocations** menu expands.
2. Click **Applications**.
   The **Applications** page appears.



3. Enter your search criteria in the **Search** area.
   If the search options do not meet your needs, click the **Advanced Search** icon at the top of the **Search** area, and enter more specific criteria.
4. Click **Search**.
   The records that meet your search criteria appear in the **Applications** region.
5. Do one of the following:
   - To select multiple records, check the boxes corresponding to the records you require, then select Maintain Application Details from the **Bulk Actions** list in the table heading.
   - To select a single record, select Maintain Application Details from the corresponding **Row Action** list.

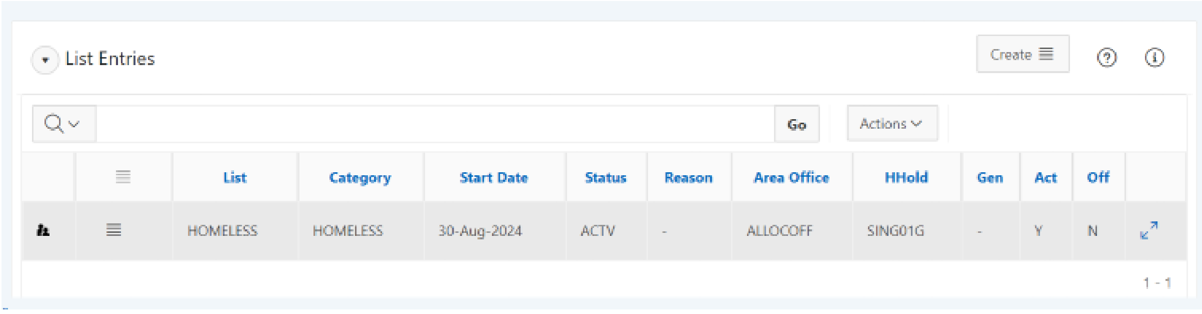
   The **Maintain Application Details** page appears.

2.8.5.1 For household type and category information:

- Click the **List Entries** link at the top of the screen.

Tip:
If this link is not visible at the top of the screen, click **More** to expand the menu.

The system scrolls down to the **List Entries** region.

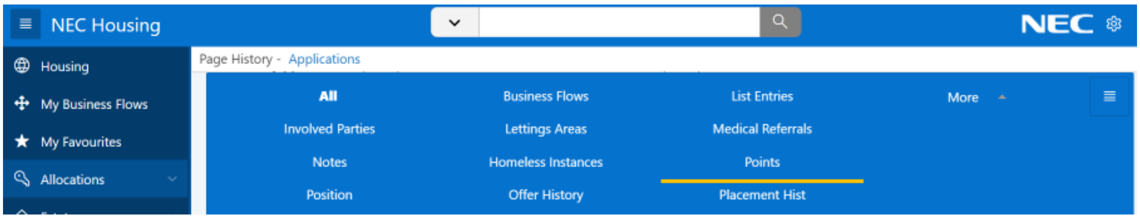


The household type and category along with the category start date are displayed in this region.

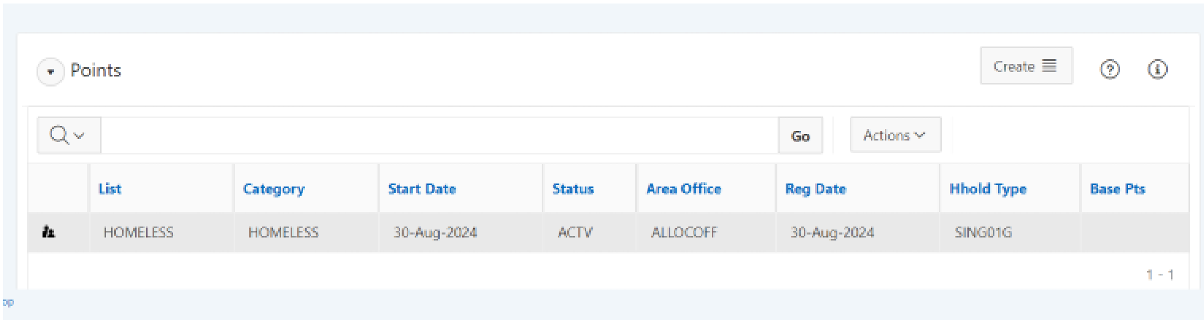
2.8.5.2 For points information:

- Click the **Points** link at the top of the screen.

Tip:
If this link is not visible at the top of the screen, click **More** ▾ to expand the menu.



The system scrolls down to the **Points** region.

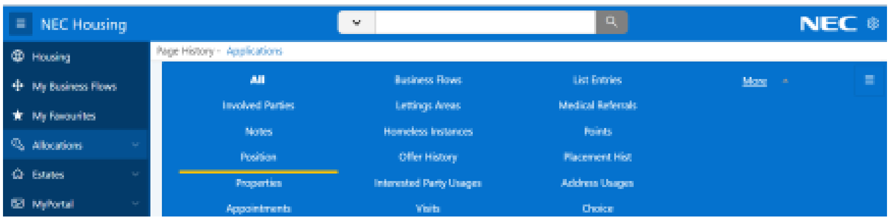


Use the **Select this record** icon to access regions for each list entry and points category within the list.

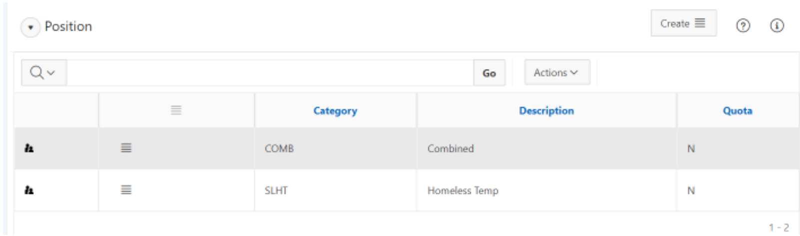
2.8.5.3 For position information:

- Click the **Position** link at the top of the screen.

Tip:
If this link is not visible at the top of the screen, click **More** ▾ to expand the menu.



The system scrolls down to the **Position** region.



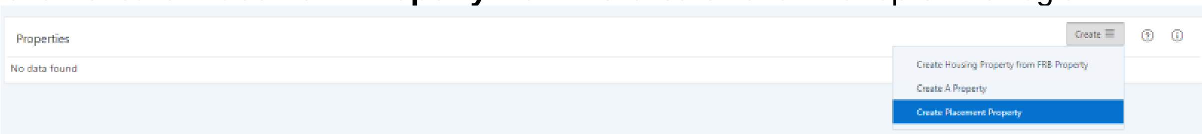
Use the **Select this record** icon to view the Allocations property types for the shortlist required.

3. Placement Properties

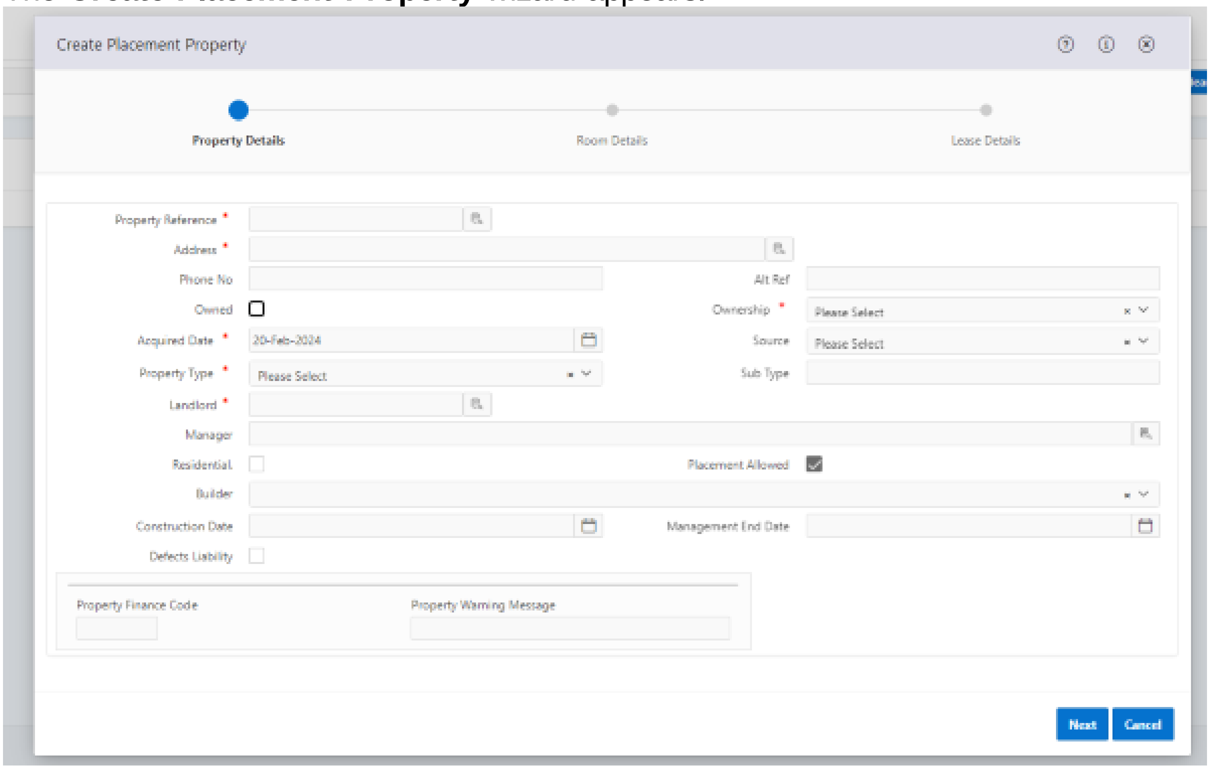
3.1 Creating a Placement Property

To complete this task, perform the following steps:

1. Click **Housing**. The **Housing** menu expands.
2. Click **Estates** .. The **Estates** menu expands.
3. Click Properties. The **Properties** summary page appears.
4. Click **Create Placement Property** from the Create list at the top of the region.

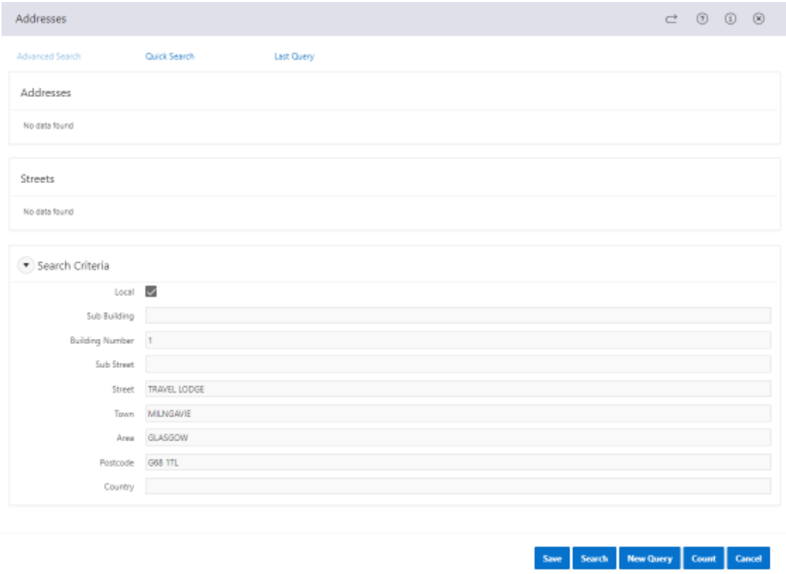


The **Create Placement Property** wizard appears.

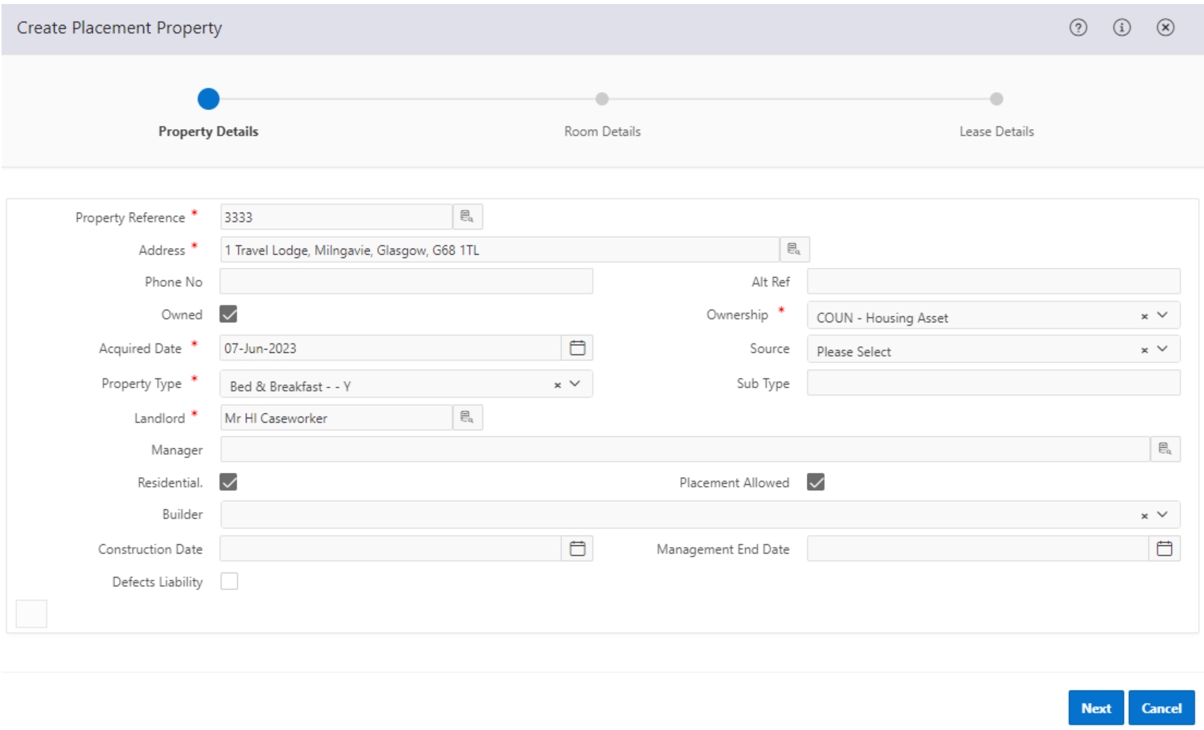


N.B ensure that the owned box is not ticked

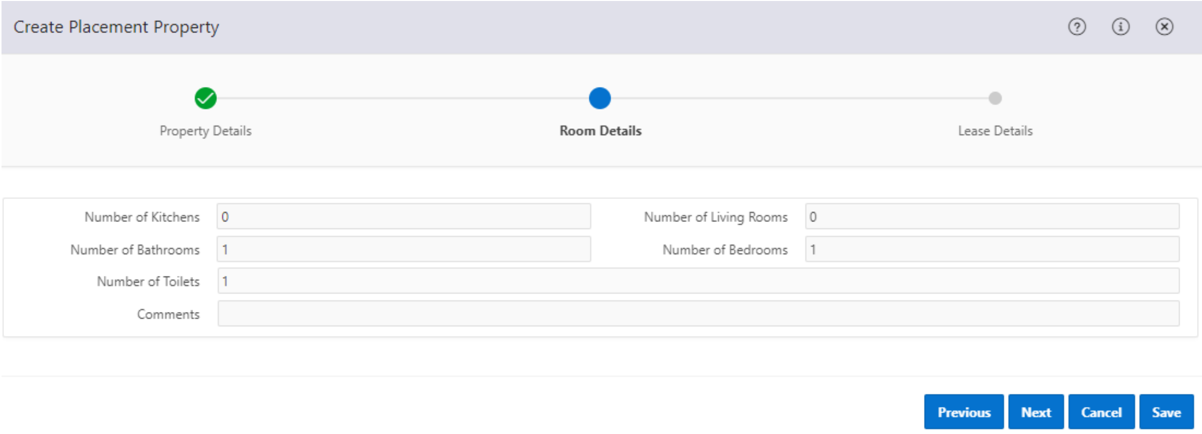
5. Enter the relevant data in the wizard.
6. Click on the search button at the end of the address line to search/create an address. Search on Property Type – B&B.



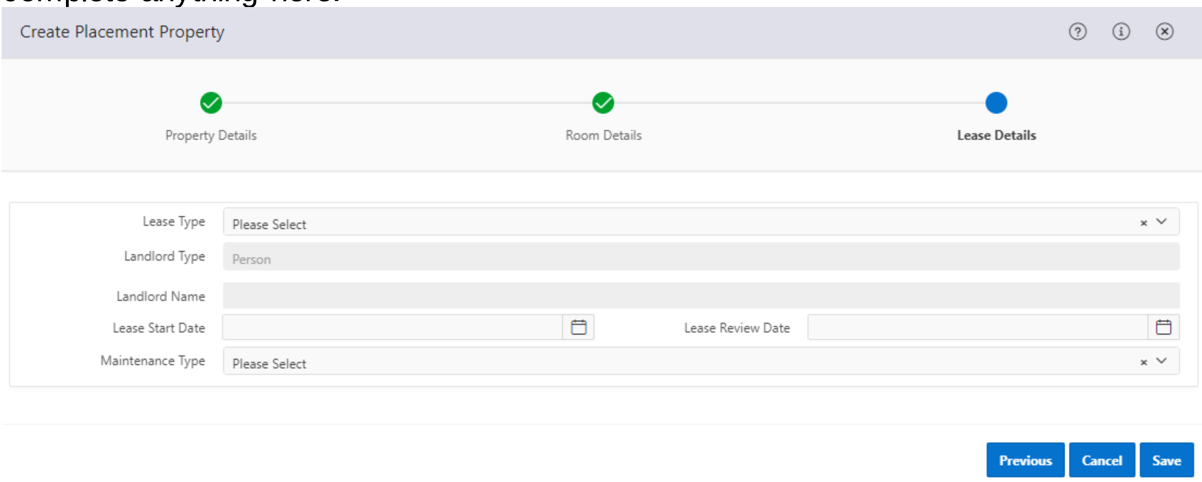
7. Click Search (if no results return – tick the local box (above sub-building) and then Save). If you have created an address, you will manually have to type in a property reference.



8. Click next, this will take you to the Room Details page



9. Click Next and this will take you to the Lease Details page – DO NOT complete anything here.



10. Click Save.

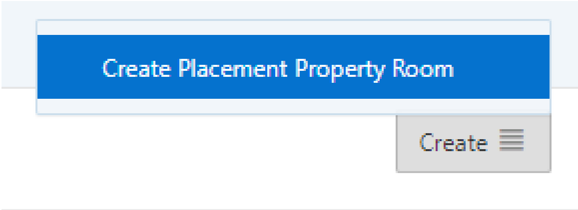
    The new property appears in the **Properties** region.

The placement property has been created.

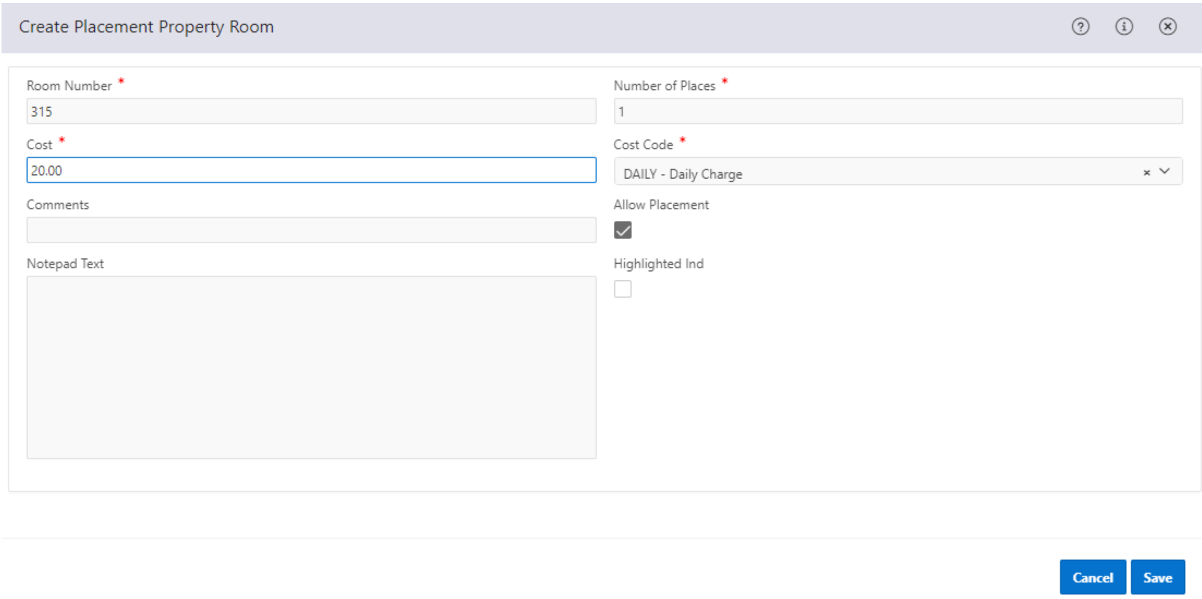
3.2 Adding a Bedroom to a Placement Property

1. Select the Placement property you have created. Select More and Rooms from the banner at the top of the screen.

2. Select Create Placement Property Room from the Create button.



3. Complete the required information.



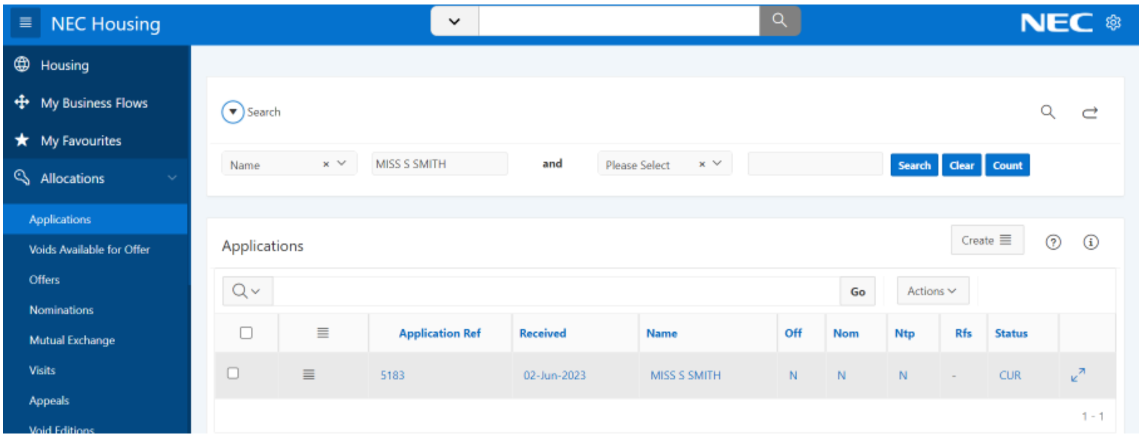
4. Application Maintenance

4.1 Changing the Main Applicant

Note:
This action is only available for the current main applicant.

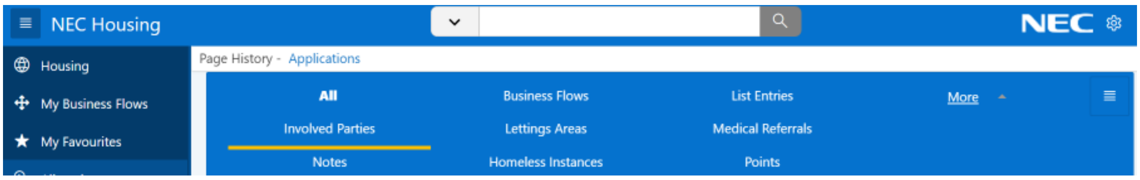
To change the main applicant of an application, do the following:

1. Click **Allocations**.
   The **Allocations** menu expands.
2. Click **Applications**.
   The **Applications** page appears.



3. Enter your search criteria in the **Search** area.
   If the search options do not meet your needs, click the **Advanced Search** icon at the top of the **Search** area, and enter more specific criteria.
4. Click **Search**.
   The records that meet your search criteria appear in the **Applications** region.
5. Do one of the following:
   - To select multiple records, check the boxes corresponding to the records you require, then select Maintain Application Details from the **Bulk Actions** list in the table heading.
   - To select a single record, select Maintain Application Details from the corresponding **Row Action** list.

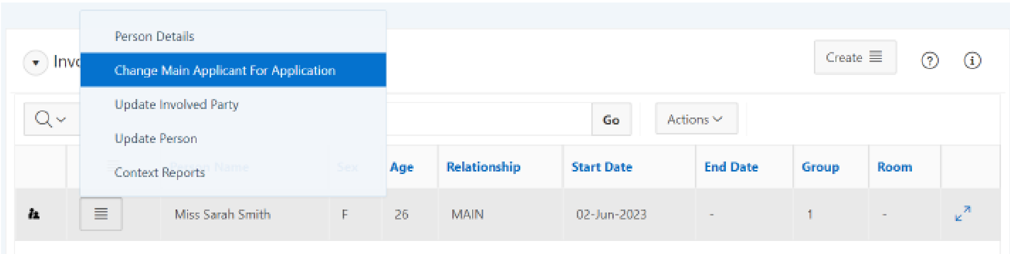
   The **Maintain Application Details** page appears.
6. Click the **Involved Parties** link at the top of the screen.



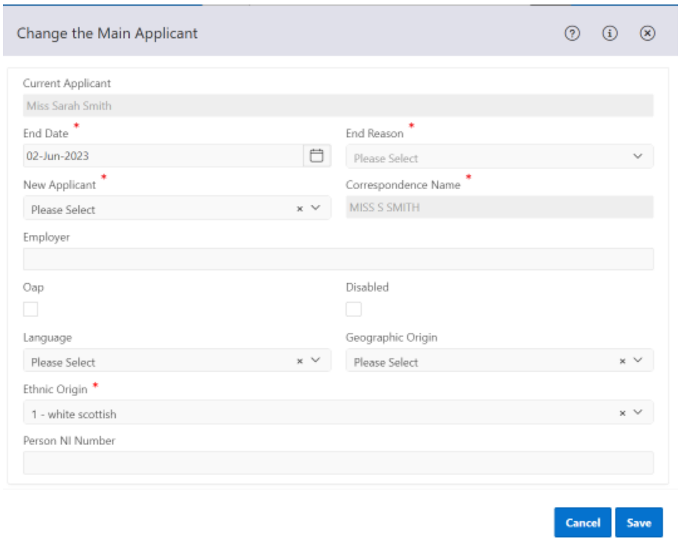
Tip:
If this link is not visible at the top of the screen, click **More** ▾ to expand the menu.

The system scrolls down to the **Involved Parties** region.

7. Select **Change Main Applicant For Application** from the **Row Action** ≡ list corresponding to the record you want to change.



The **Change the Main Applicant** form appears.



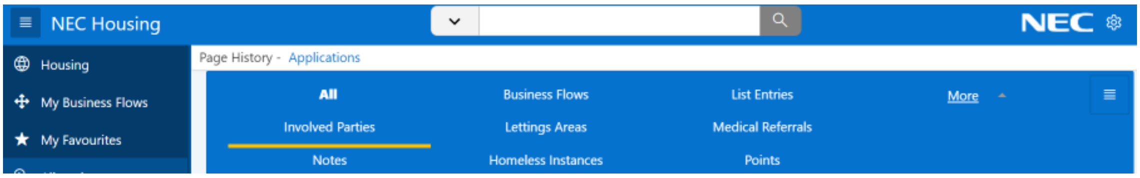
8. In the **Change the Main Applicant** form, do the following:
   a. Enter the date the current applicant ceases to be the main applicant.
   b. Select the reason the current applicant is longer the main applicant.
   c. Select the name of the involved party who is to be the new main applicant.
9. Click **Save**.
   The form closes and you are returned to the **Involved Parties** region.

The changes you made to the main applicant have been applied.

4.2 Updating Involved Parties

To update an involved party on an application, access the **Maintain Application Details** page, then do the following:

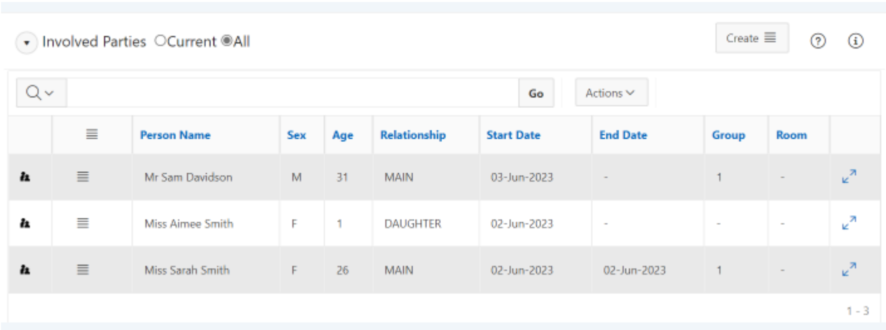
1. Click the **Involved Parties** link at the top of the screen.



Tip:

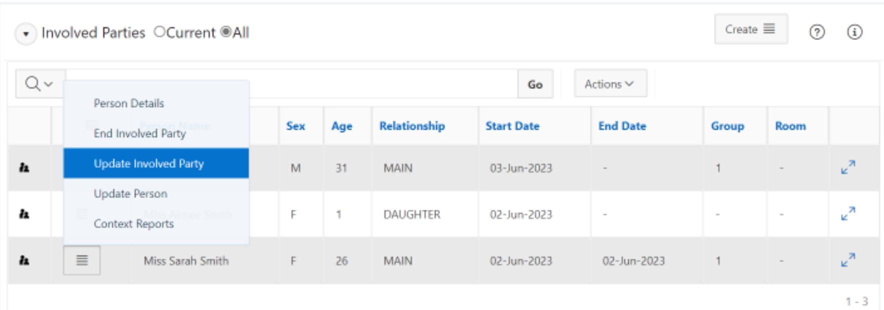
If this link is not visible at the top of the screen, click **More** ▼ to expand the menu.

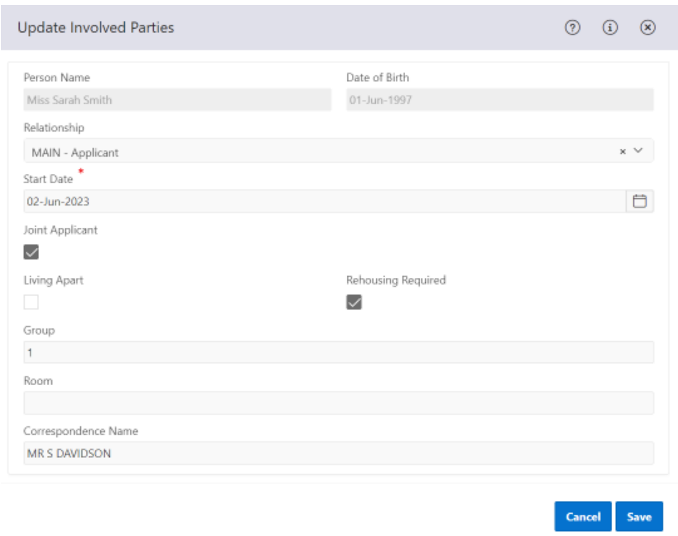
The system scrolls down to the **Involved Parties** region.



2. Select **Update Involved Party** from the **Row Action** list corresponding to the record you want to update.

The **Update Involved Parties** form appears.





3. Enter the relevant data in the form.
4. Click **Save**.
   The form closes and you are returned to the **Involved Parties** region.

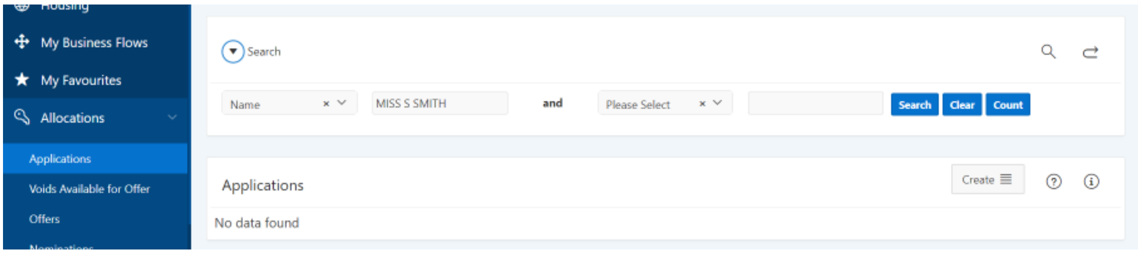
The changes you made to the involved party have been applied.

4.3 Updating Applications

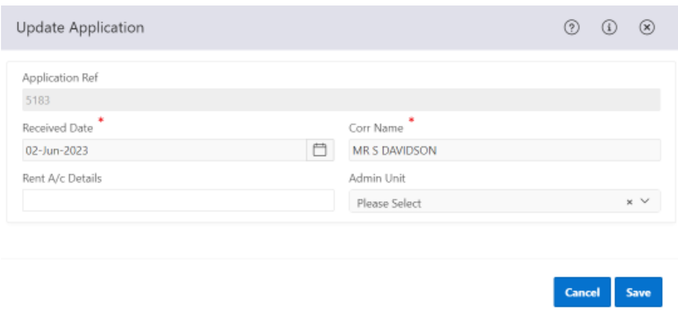
You may wish to update details of an application such as the date it was received, correspondence name or rent account details.

To update an application, do the following:

1. Click **Allocations**.
   The **Allocations** menu expands.
2. Click **Applications**.
   The **Applications** page appears.



3. Enter your search criteria in the **Search** area.
   If the search options do not meet your needs, click the **Advanced Search** icon at the top of the **Search** area, and enter more specific criteria.
4. Click **Search**.
   The records that meet your search criteria appear in the **Applications** region.
5. Select **Update Application** from the **Row Action** list corresponding to the record you want to update.
   The **Update Application** form appears.



6. Enter the relevant data in the form.
7. Click **Save**.
   The form closes and you are returned to the **Application** region.

The changes you made to the application have been applied.

4.4 Medical Referrals

A medical referral is a referral to a doctor or medical specialist to confirm a disability or medical condition indicated on an application.

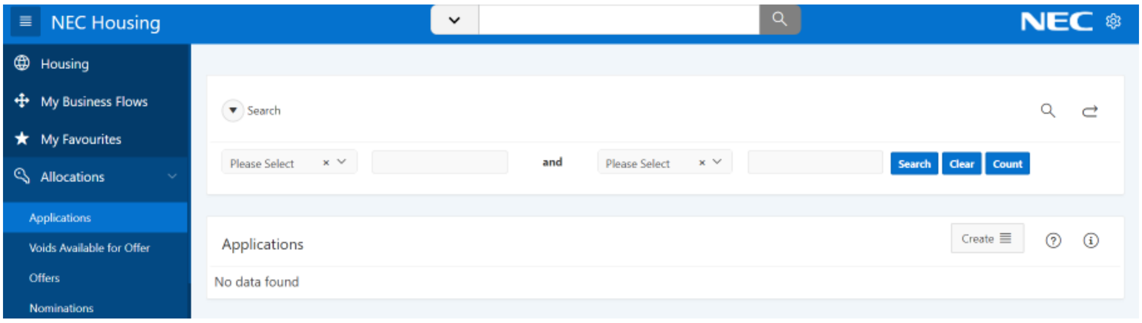
The **Medical Referrals** region enables you to maintain this information and displays details such as, the referral date, the status, and the result of the referral.

Note:
Medical referral reference numbers are generated by NEC Housing and allow multiple referrals to be created for each application.

4.4.1 Creating Medical Referrals

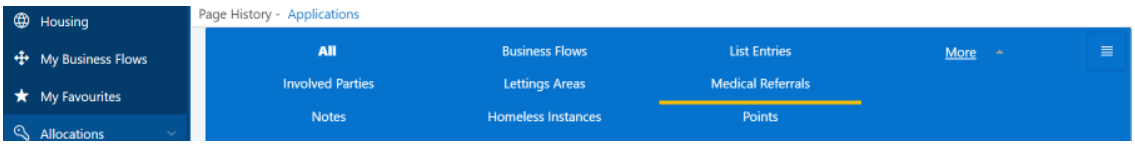
To create a medical referral, do the following:

1. Click **Allocations** .
   The **Allocations** menu expands.
2. Click **Applications**.
   The **Applications** page appears.



3. Enter your search criteria in the **Search** area.
   If the search options do not meet your needs, click the **Advanced Search** icon at the top of the **Search** area, and enter more specific criteria.
4. Click **Search**.
   The records that meet your search criteria appear in the **Applications** region.
5. Do one of the following:
   - To select multiple records, check the boxes corresponding to the records you require, then select Maintain Application Details from the **Bulk Actions** list in the table heading.
   - To select a single record, select Maintain Application Details from the corresponding **Row Action** list .

   The **Maintain Application Details** page appears.
6. Click the **Medical Referrals** link at the top of the screen.

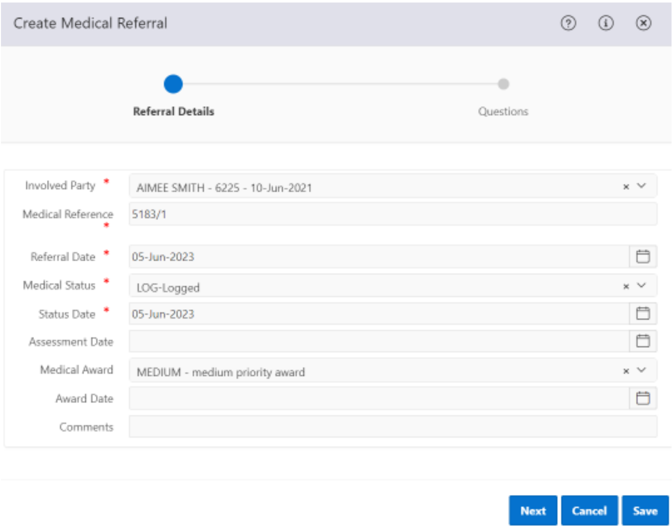


Tip:
If this link is not visible at the top of the screen, click **More** ▼ to expand the menu.

The page refreshes to display the selected region.

7. Select **Create Medical Referral Details** from the **Create** ≡ list at the top of the region.

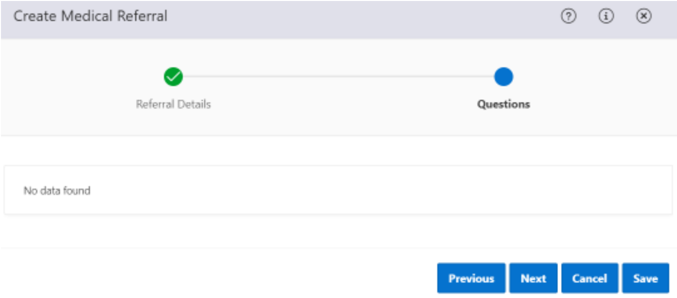
The **Create Medical Referral** wizard appears.



8. In the **Referral Details** page, do the following:
   a. Enter the relevant referral details.

   Note:
   The **Medical Ref** is generated by NPS Housing and allows for multiple referrals per application.

   b. Click **Next** to access the **Questions** page.
9. In the **Questions** page – we have no questions to answer here.



10. Click **Save**.
    The new medical referral appears in the **Medical Referrals** region.

The medical referral has been created.

5. Offers of Placement properties

5.1 Key Terms

Short List

A list of applicants who meet the criteria for the property.

Offer Reason

An optional user defined code that denotes the reason an offer has been made, e.g., harassment, location to school.

Offer Stage

An offer can progress through user defined stages, e.g., earmark, provisional offer, written offer.

Offer Events

An offer event can be recorded in the void history, e.g., offer made, offer accepted.

Tenancy Type

Tenancy types are defined by your organisation. For each one created a periodic status value of 'Daily' or 'Periodic' is specified.

The periodic status determines which day of the week tenancies can start and end.

Tenure Type

A code defined by your organisation. These can be used to identify the type of tenure, e.g., secure, non-secure, assured, leasehold, freehold.

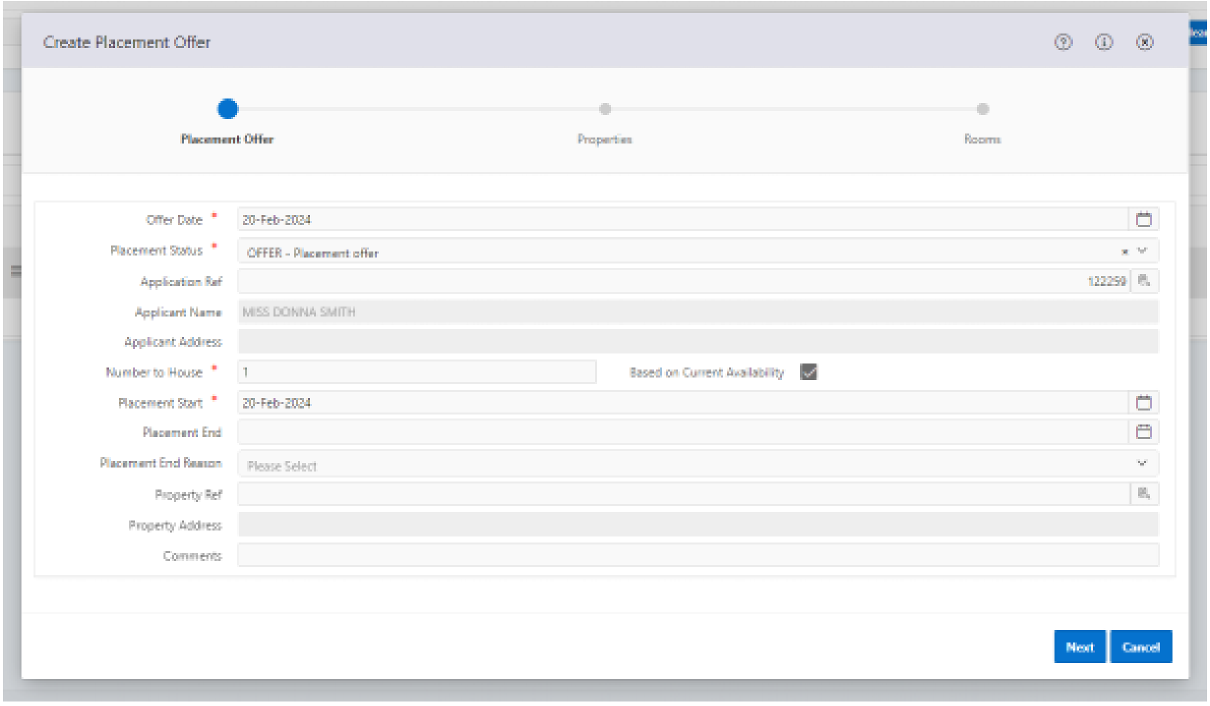
5.2 Creating a Placement Offer

Info:

Property records for various types of hostels and temporary accommodation can be held on the system; these may be owned by your organisation or other organisations.

To find suitable homeless applicants for a placement available for offer, do the following:

1. Click **Allocations**.
   The **Allocations** menu expands.
2. Click **Placements**.
   The **Placements** page appears.
3. Select **Create Placement Offer** from the **Create** List at the top of the region.
   The **Create Placement Offer** wizard appears.
4. Enter the relevant data in the wizard.

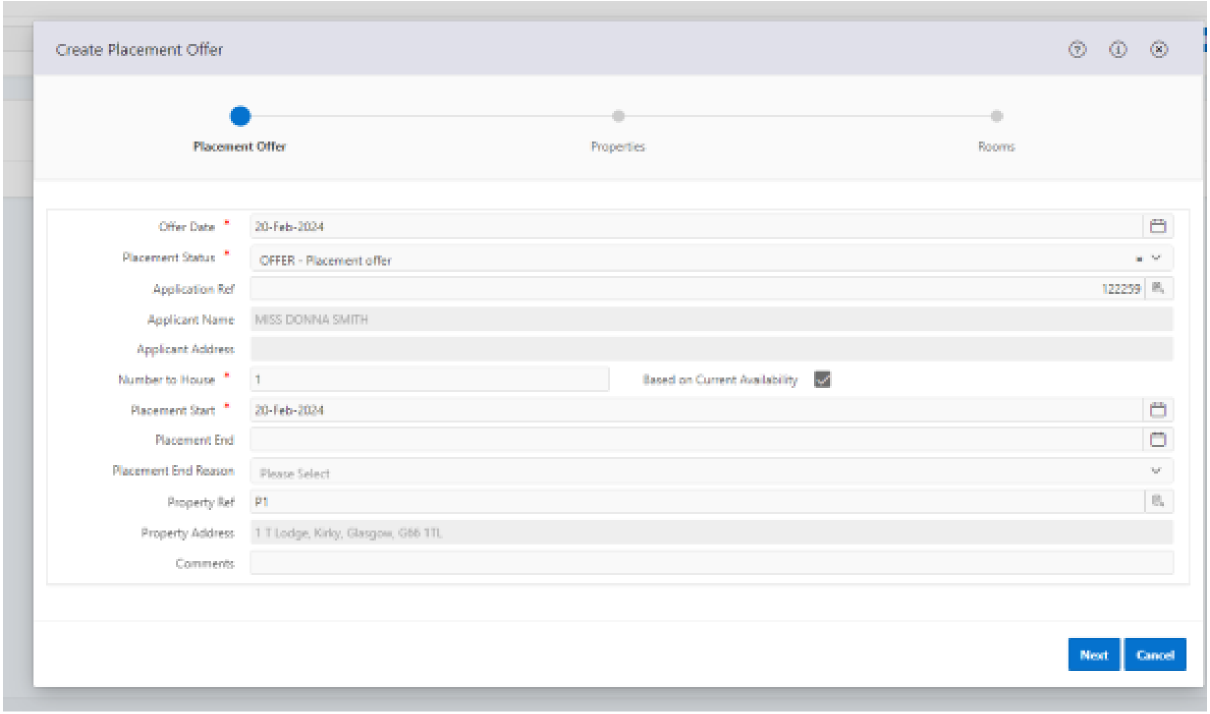


   Select Next. This will take you to the Properties screen.

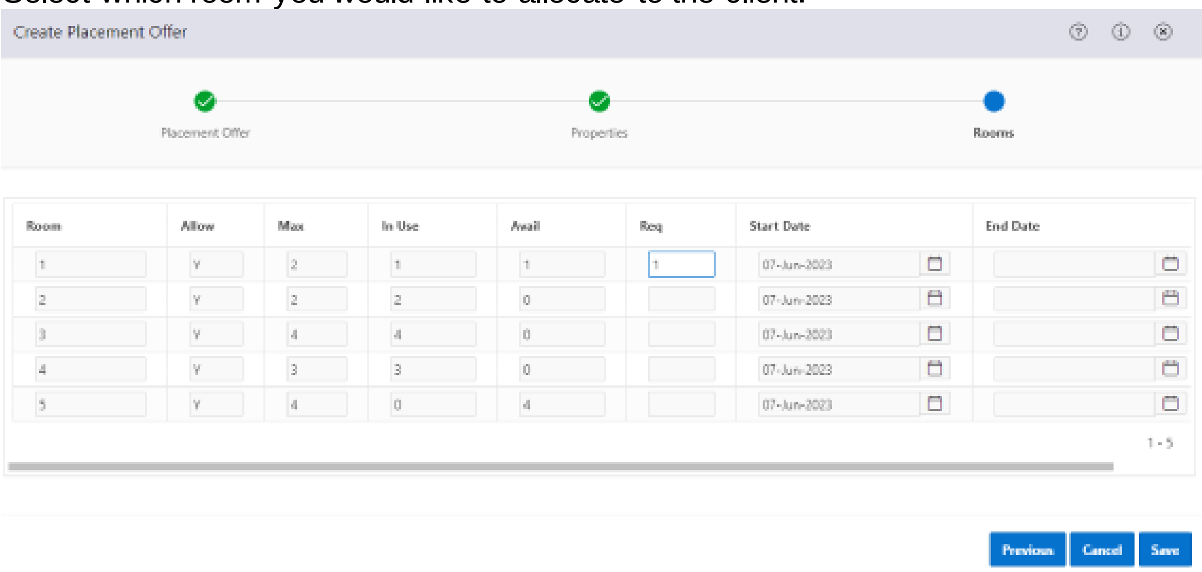
5. Select the property you wish to offer, then Next.

	Reference	Property Address	Type	Sub Type		Res	Ntp	Status	Status Date
Select	DM13022024	6 1/2 19 Merryton Road, Kirkintilloch, Glasgow, G66 1PG	BB	-	EMERGENCY	Y	N	VOID	16-Feb-2005
Select	P1	1 T Lodge, Kirky, Glasgow, G66 1TL	BB	-	EMERGENCY	Y	N	VOID	19-Jan-2024
Select	P5	1 Travel Lodge, Kirkintilloch, Glasgow, G66 1PP	BB	-	EMERGENCY	Y	N	VOID	19-Feb-2024
Select	SG1	999 Tweed Drive, Bearsden, Glasgow, G61 1EL	BB	-	EMERGENCY	Y	N	VOID	19-Feb-2022

1 - 4



6.
7. Select which room you would like to allocate to the client.



8. Click Save.
   The wizard closes, and you are returned to the Placement region.

   The placement offer has been created.

6. Offer Maintenance

6.1 Offers

Offers are the options offered to the client, for example, the offer of a property following a housing application.

An offer can be refused by the applicant or withdrawn by the organisation. If the offer is refused or withdrawn, reasons are required. In some cases, the applicant may accept an offer and change their minds and you will need to reverse the acceptance and then record the refusal. Occasionally an applicant will refuse an offer and change their minds. If no further offer has been made, the refusal can be reversed, and an acceptance entered.

Letters (or an email or text) can be generated to advise the applicant of the offer details.

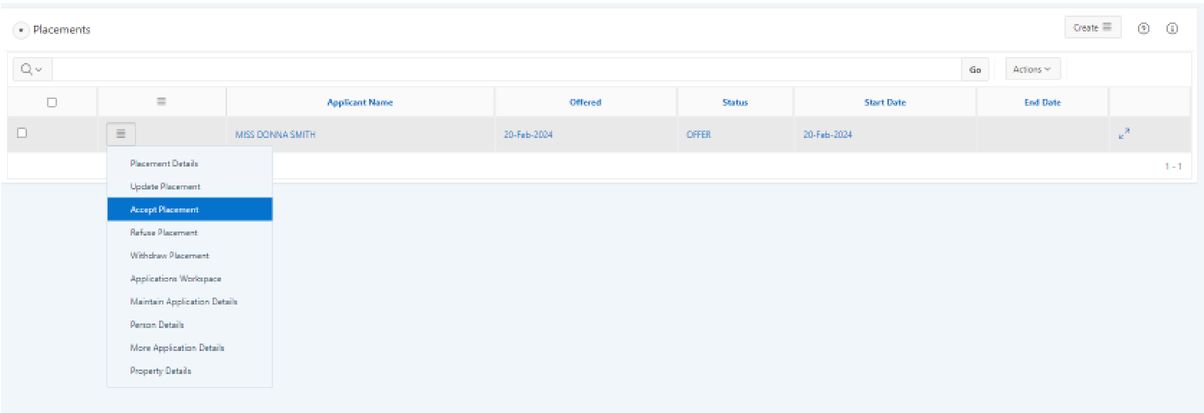
6.2 Recording the Outcome of an Offer

The outcome of an offer can be recorded through multiple actions in NEC Housing. Each of the possible outcomes is dependent on the retrieval of an appropriate offer and the configuration of the offer stage.

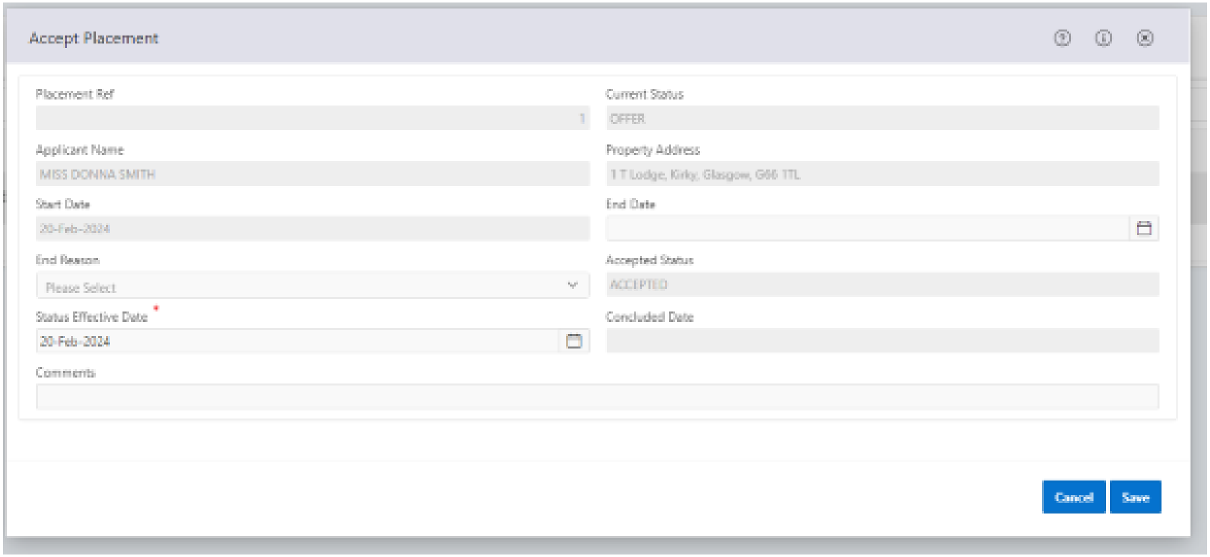
6.3 Accepting Offers

To accept an offer access the **Placements** summary page, do the following:

1. Select **Accept Placement** in the **Row Action** ≡ list corresponding to the record you want to accept the organisation offer for.



The **Accept Placement** form appears.

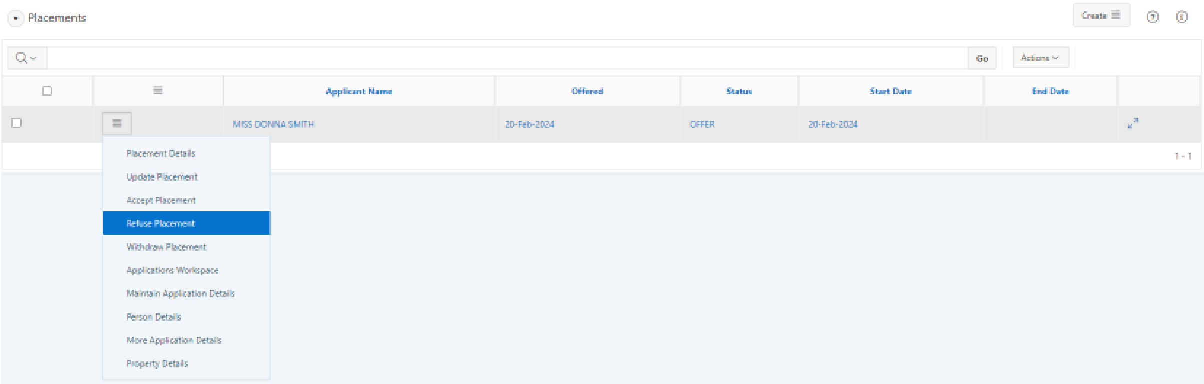


2. Enter the relevant data in the form.
3. Click **Save**.
   The form closes and you are returned to the **Placements** region.

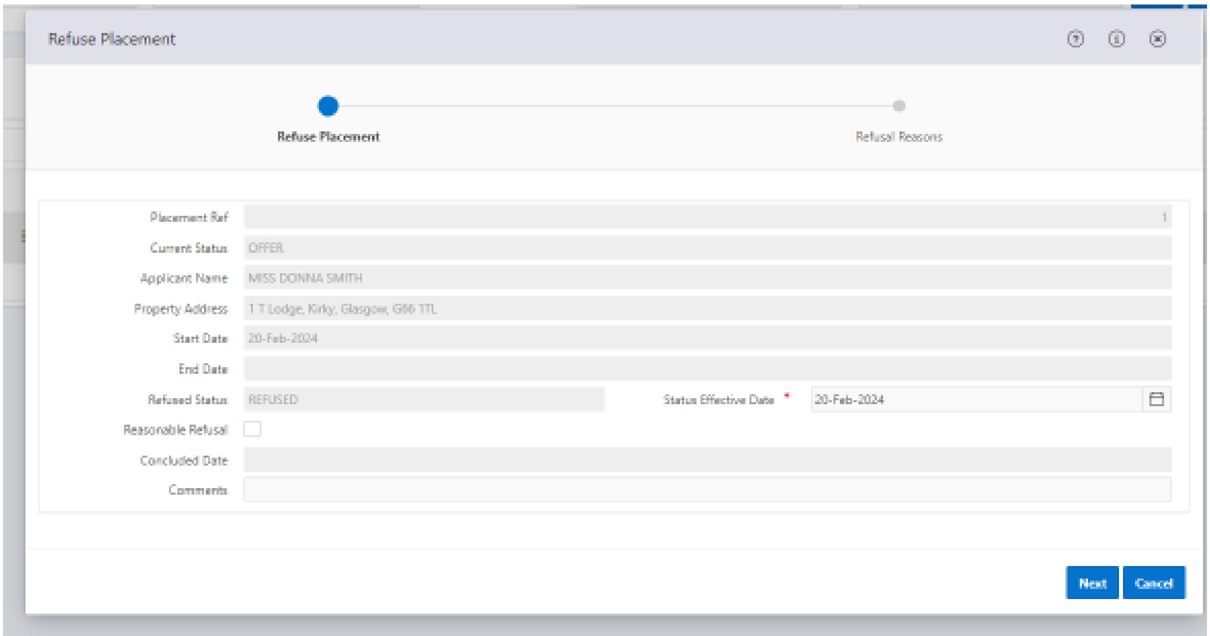
6.4 Refusing Offers

To refuse an offer access the **Placements** summary page and perform a search, then do the following:

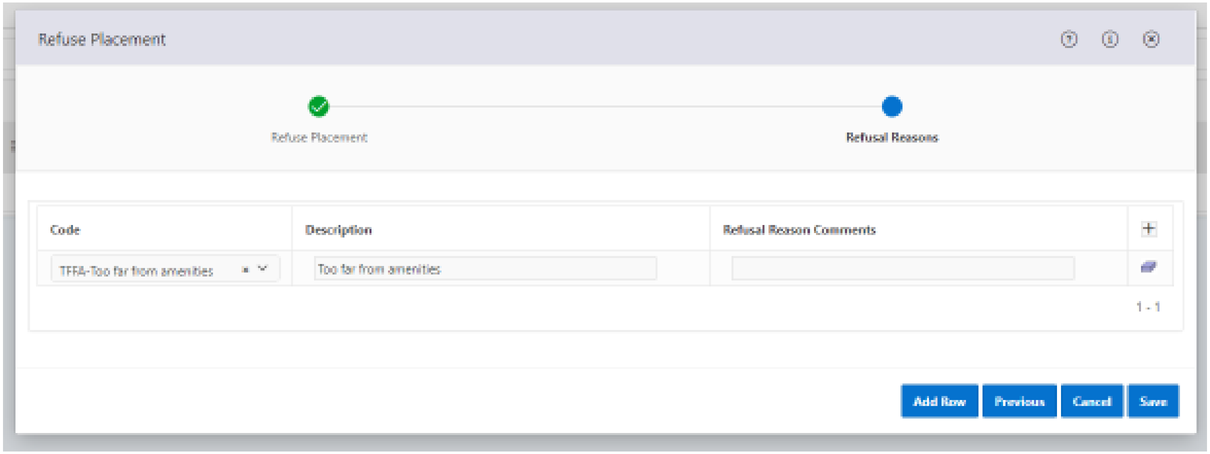
1. Select **Refuse Offer** from the **Row Action** ≡ list corresponding to the record you want to select.



The **Refuse Offer** wizard appears.



3. In the **Refusal Reason** page, do the following:



   a. Enter or update the relevant data.
      If required, click the **Add Row** button to record more than one refusal reason.

4. Click **Save**.
   The wizard closes and you are returned to the **Offers** region.

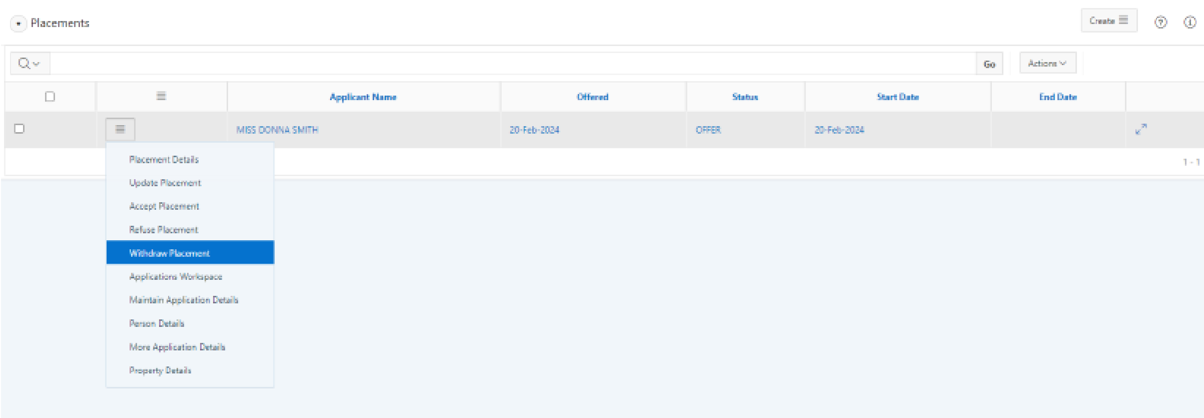
The offer has been refused.

6.5 Withdrawing Offers

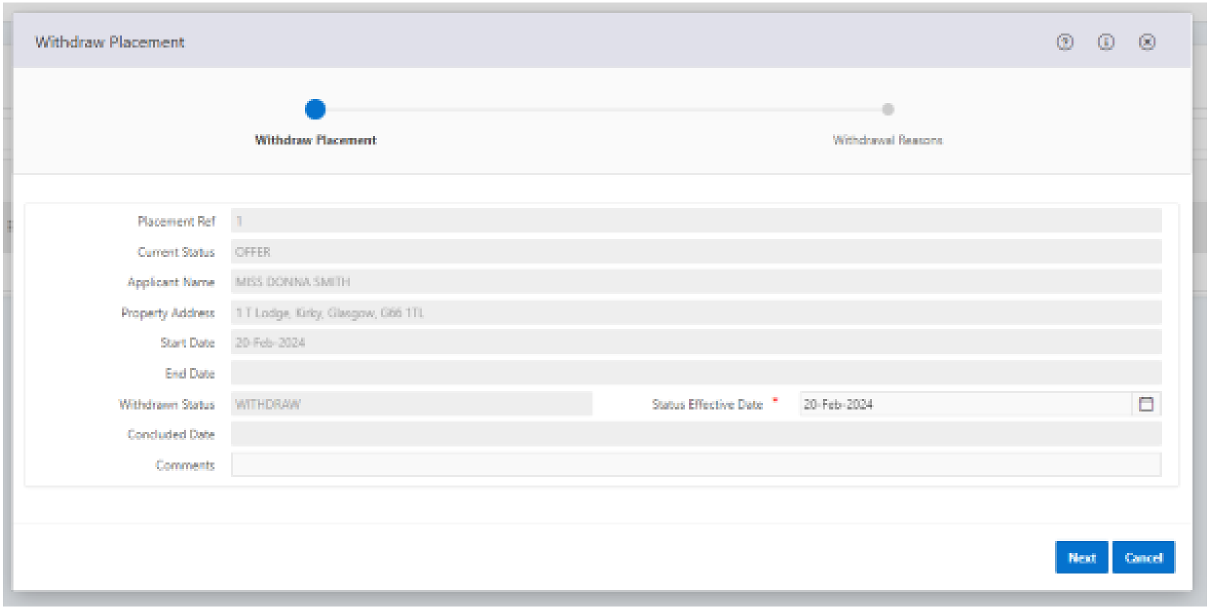
Note:
You can only complete this task if the record selected has a **Status** of OFFER.

To refuse an offer, access the **Offers** summary page and perform a search, then do the following:

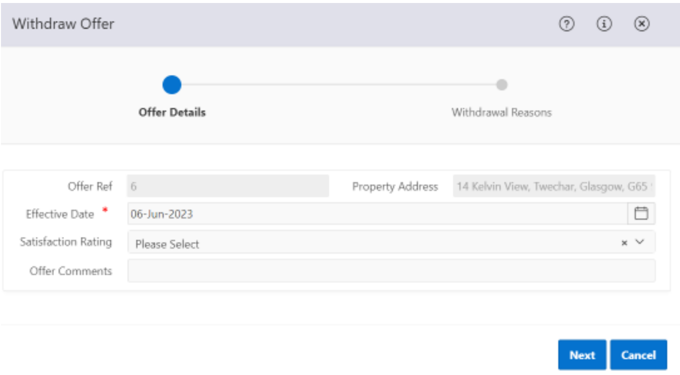
1. Select **Withdraw Offer** from the **Row Action** ≡ list corresponding to the record you want to select.



The **Withdraw Offer** wizard appears.

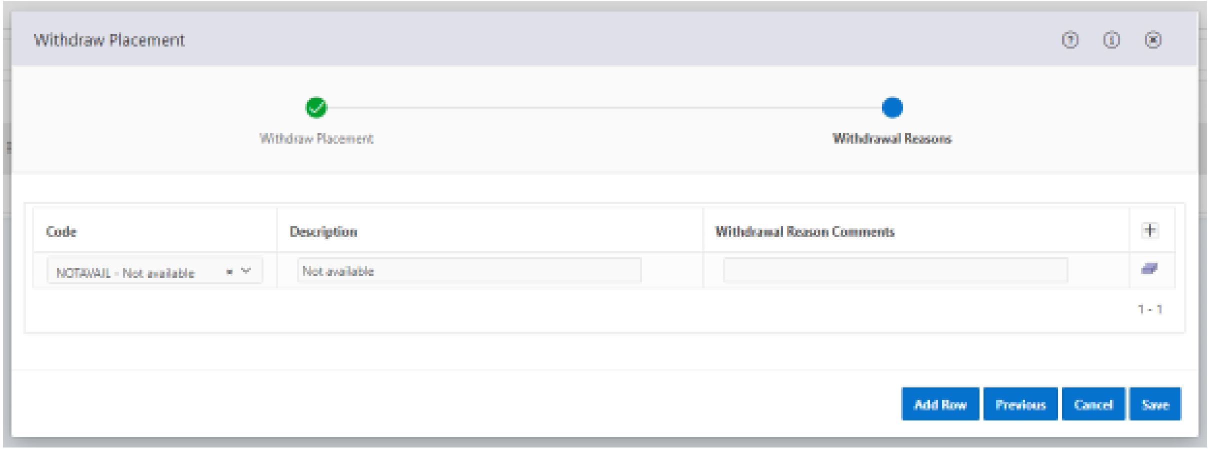


2. In the **Offer Details** page, do the following:



   a. Enter or update the relevant data.
   b. Click **Next** to access the **Withdrawal Reason** page.

3. In the **Withdrawal Reason** page, do the following:



a. Enter or update the relevant data.
   If required, click the **Add Row** button to record more than one withdrawal reason.

4. Click **Save**.
   The wizard closes and you are returned to the **Offers** region.

The offer has been withdrawn.

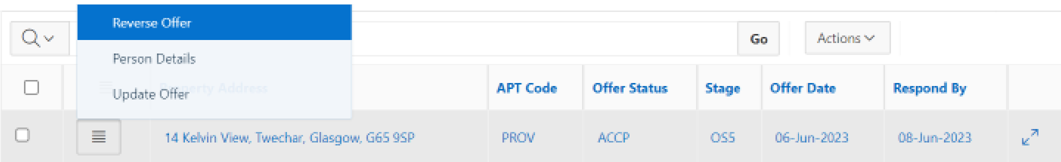
Note:
An offer can also be subject to a pending withdrawal where a user cannot fully withdraw the offer and it must be confirmed by another officer.

6.6 Reversing Offer Decisions

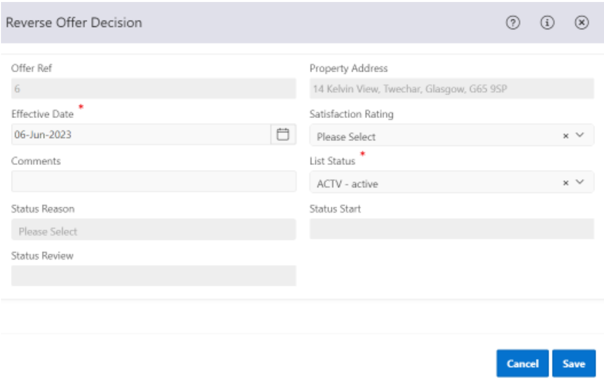
Reversing an offer will return the status of the offer to the previous offer stage. For example, if it has been refused but not re-allocated to another applicant, it may be reversed and will then be a current offer to the applicant.

To reverse an offer decision access the **Offers** summary page and perform a search then do the following:

1. Select **Reverse Offer** from the **Row Action** ≡ list corresponding to the record you want to select.



The **Reverse Offer Decision** form appears.



2. Enter the relevant data in the form.
3. Click **Save**.
   The form closes and you are returned to the **Offers** region.

The changes you made to the offer decision have been applied.

Important:
You must now record the result of an offer.

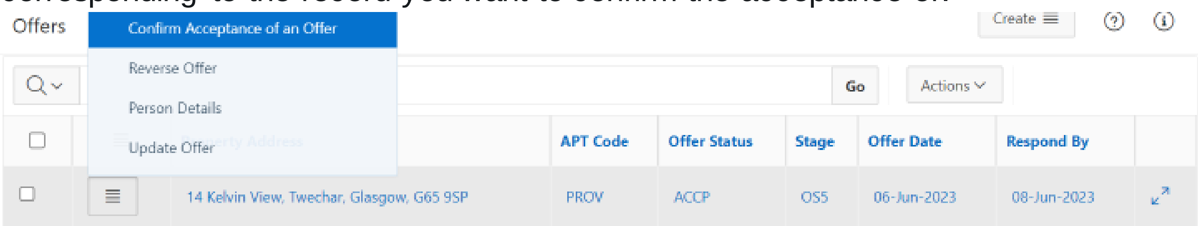
6.7 Confirming the Acceptance of an Offer

This process confirms the acceptance of an offer and creates a new tenancy. It may also invoke a follow-on action to create a rent account subject to configuration of user security.

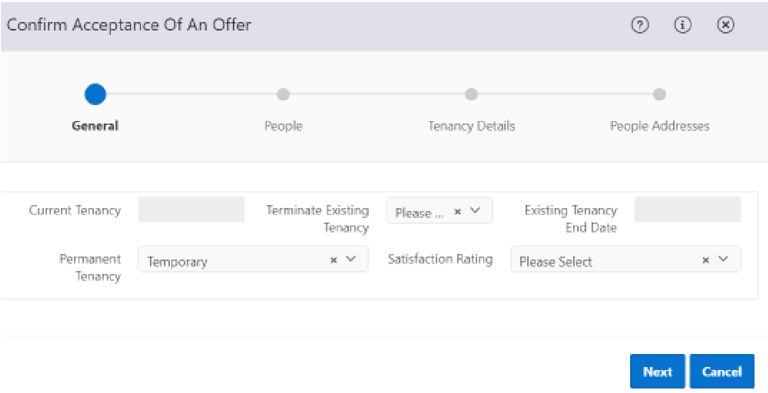
Note:
Offers can only be confirmed for offers with a status of ACCPTD - Accepted.

To confirm the acceptance an offer access the **Offers** summary page and perform a search then do the following:

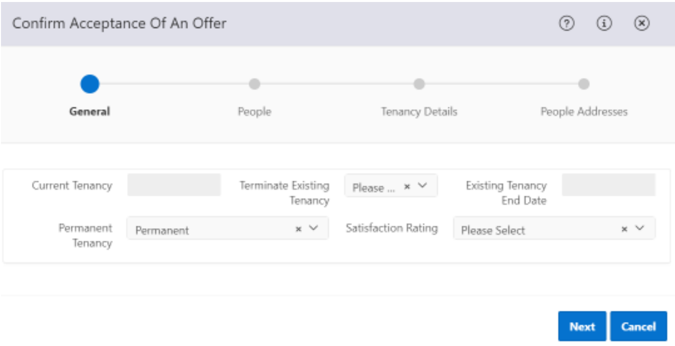
1. Select **Confirm Acceptance of an Offer** from the **Row Action** list corresponding to the record you want to confirm the acceptance of.



The **Confirm Acceptance Of An Offer** wizard appears.

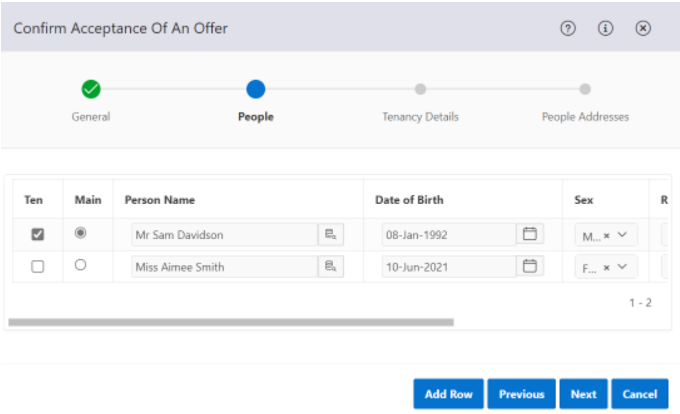


2. In the **General** page, do the following:



   a. Enter or amend any data.
   b. Click **Next** to access the **People** page.

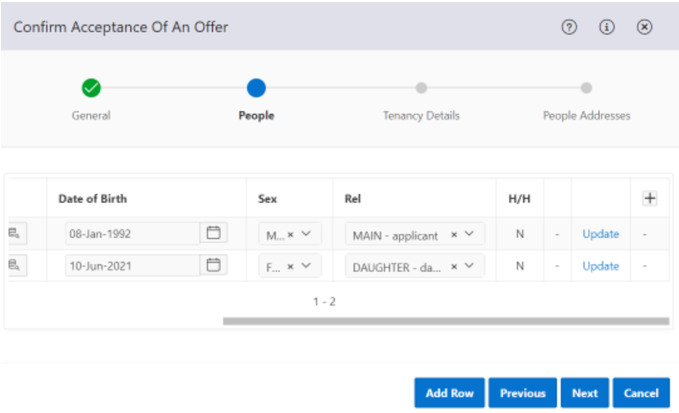
3. In the **People** page, do the following:



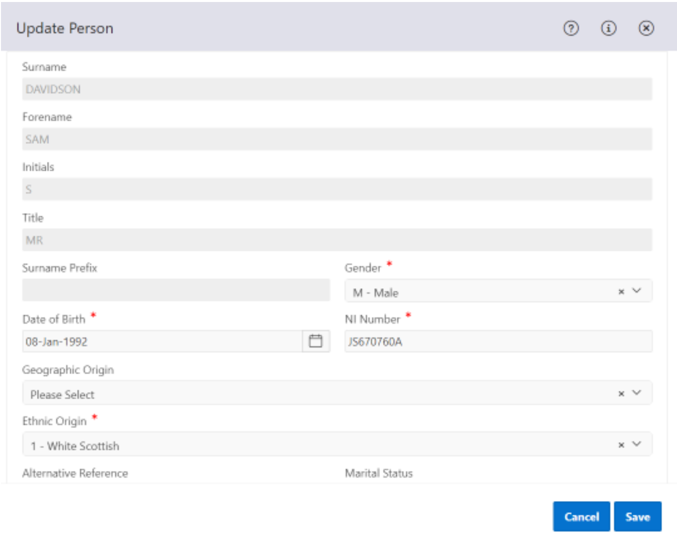
   a. Enter or amend the people and tenant details.

   Note:
   It is likely that the date of birth, relationship and gender has previously been entered as part of the application process. However, there may be other fields to complete.

   b. Click the **Update** link.
   The **Update Person** form appears.

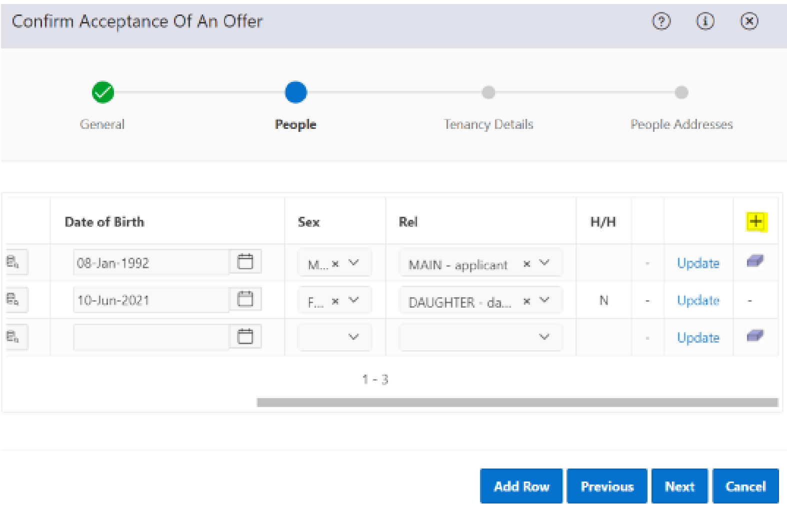


4. In the **Update Person** form, do the following:



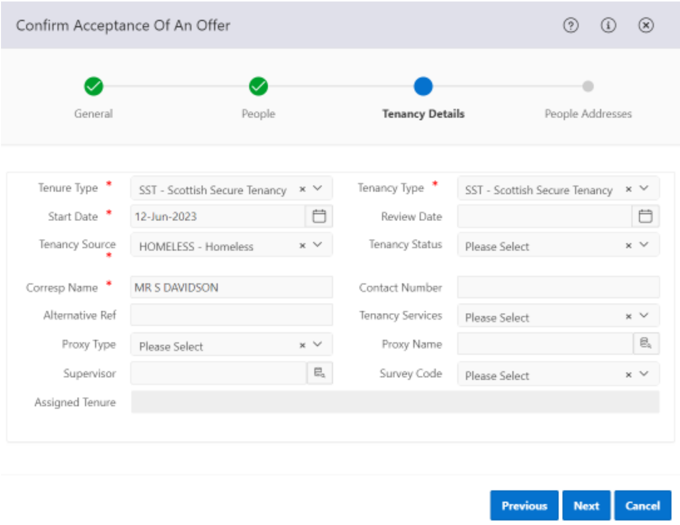
   a. Enter or update further person details, as required.
      This may include ethnic origin, faith, and sexuality.
   b. Click **Save**.
      The details of the person are updated, and you are returned to the **People** page.

5. In the **People** page, do the following:



a. Click **Add Row** to associate another person with the tenancy who was not part of the original application, if required.
b. Enter the relevant data in the fields displayed.
c. Click **Next** to access the **Tenancy Details** page.

6. In the **Tenancy Details** page, do the following:

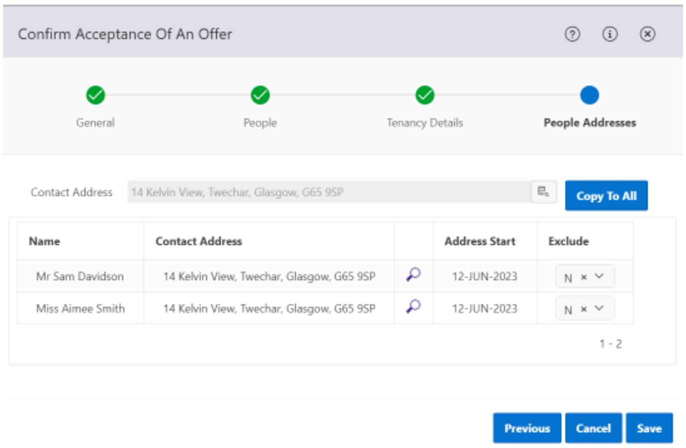


a. Enter or amend the tenancy details and any other fields.

Note:
Further information may be displayed if tenure band functionality has been configured.

b. Click **Next** to access the **People Addresses** page.

7. In the **People Addresses** page, do the following:



a. Enter or confirm the contact address details.

> ***Tip:***
> Provided the tenancy is being created for a residential property, it's addresses can be copied to all people on the application by clicking **Copy To All**.

b. You can exclude one or more people from the application, if required.

c. You can assign alternative address using the **Open Search Page** icon corresponding to the appropriate person.

8. Click **Save**.

   The wizard closes and you are returned to the **Offers** region.

The offer has been accepted and a system message that contains warnings that a tenancy has been created and contact addresses have been amended is displayed.

> ***Note:***
> If your system has been configured to create a follow-on rent account, the Rents module will be displayed with the option to create a revenue account as an action against the tenancy in the **Account Creation** summary page. See the *Rents Training Manual* for further information.

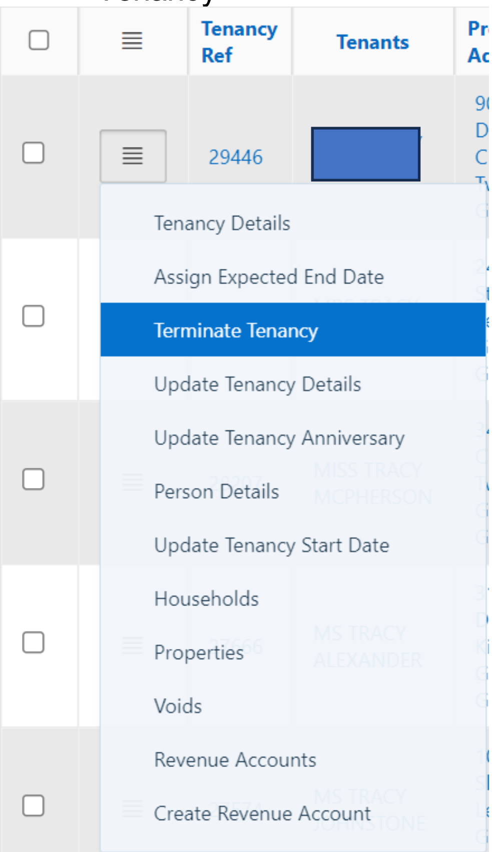
> ***Note:***
> The system will create a new tenancy and a person tenure band for each person indicated as a tenant on the **People** form of the **Confirm Acceptance of an Offer** wizard.

7. Terminating a Tenancy and Rent Account

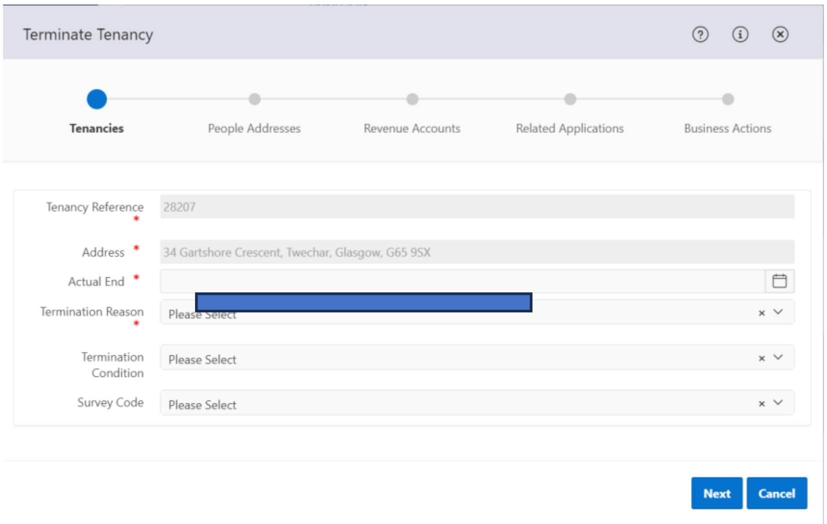
a. Ending a tenancy automatically ends a rent account.

b. In “Tenancies”, search for the tenancy using the search or advanced search options

c. “Row Action” the tenancy you want to terminate and select “Terminate Tenancy”

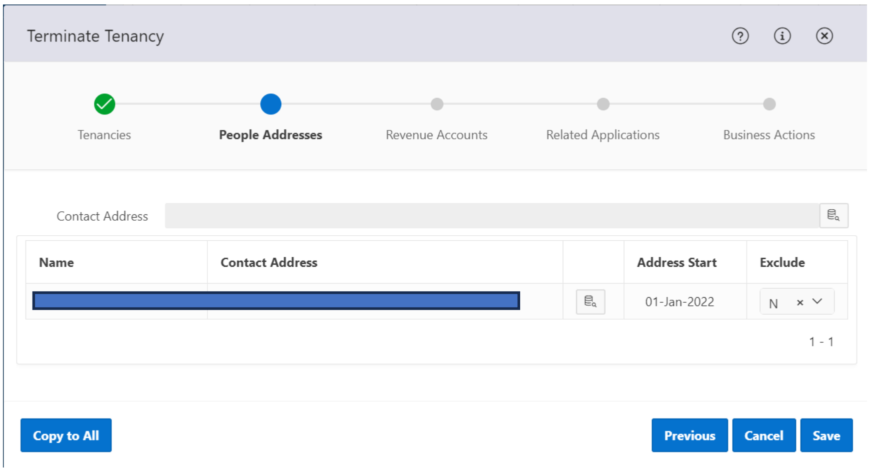


d. Complete the “Terminate Tenancy” wizard starting with the “Tenancies” page by entering the end date and termination reason.



e. Click “Save”

f. Complete the “People Addresses” page by entering the new address for everyone in the household using the “Open Search” in the “Contact Address” column.



g. Click “Next”

h. This then terminates the Revenue Accounts and a system message will confirm this.

8. Void Management

8.1 Void Components

The components of a void are 'Events' and 'Stages' examples of which are shown in the following tables.

Note:
A void path can comprise of a series of events and stages

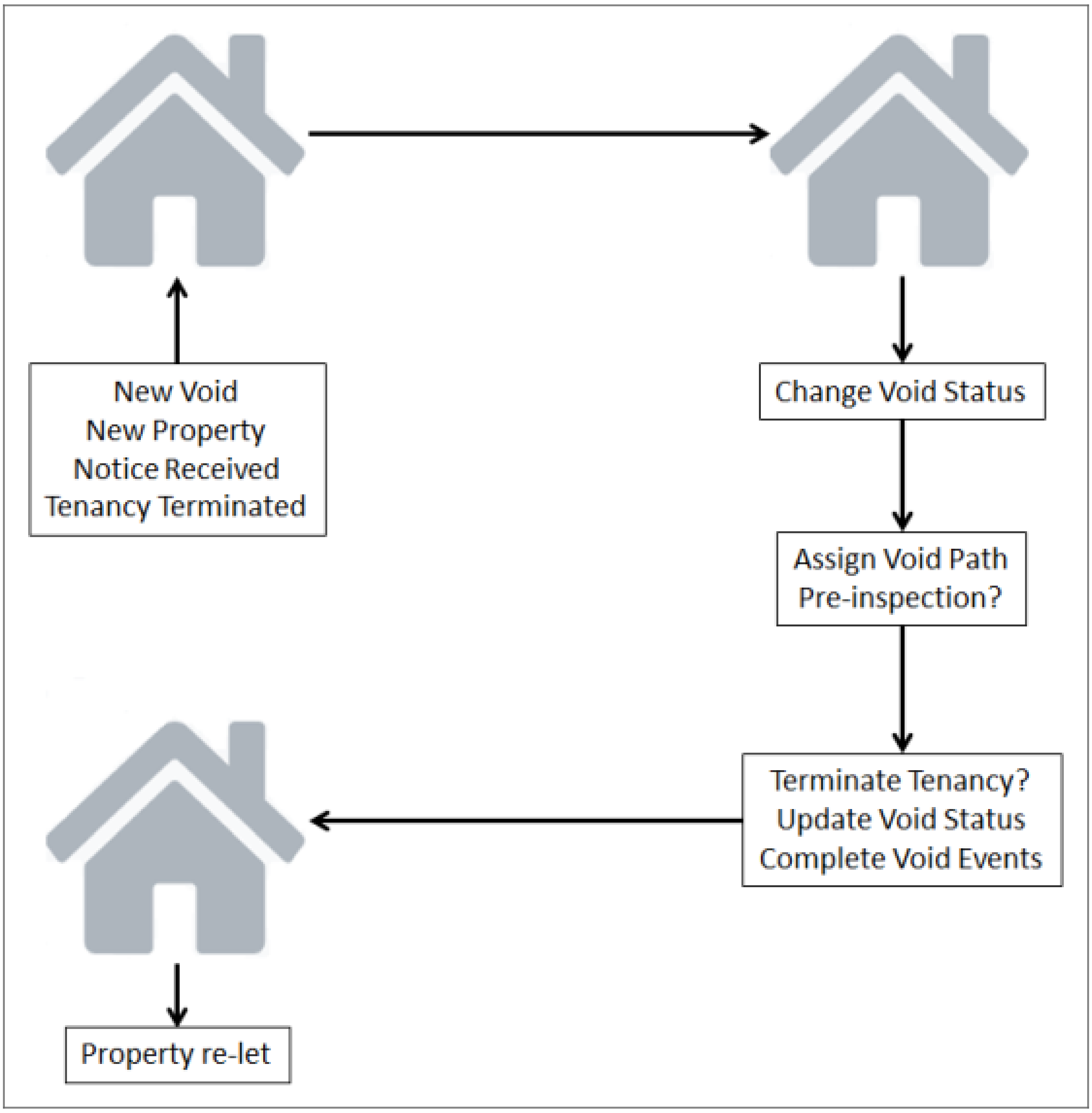
Void Events

PRVN	Pre-termination Notice	Date Entered
TERM	Termination Date – Void created	Date Entered
V001	Clear out after death of tenant	Date Entered
V002	Police incident	Date Entered
KYST	Keys from Tenant	Date Entered

Void Stages

PRE1	Pre-termination Notice period	28 days
TDKT	Termination date to Keys from Tenant	1 day
COAD	Keys back after clear out following death	28 days
PINC	Keys back after Police Incident	28 days

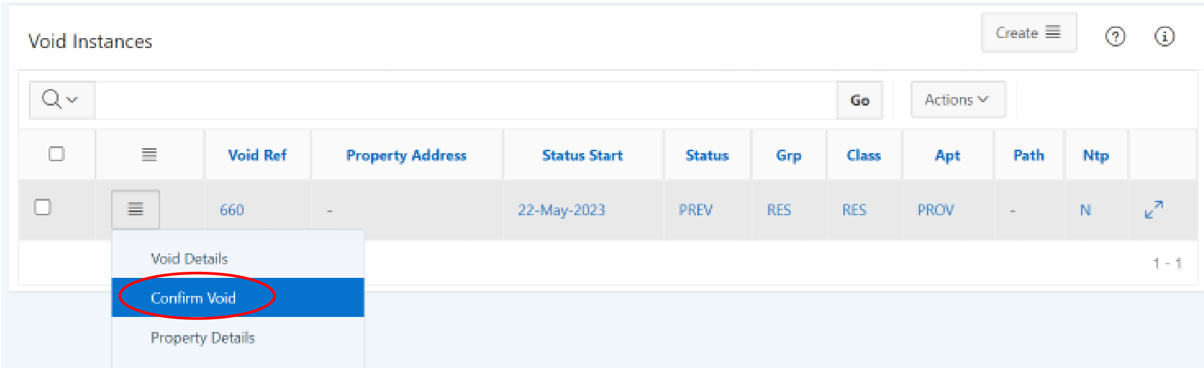
8.2 Void Cycle



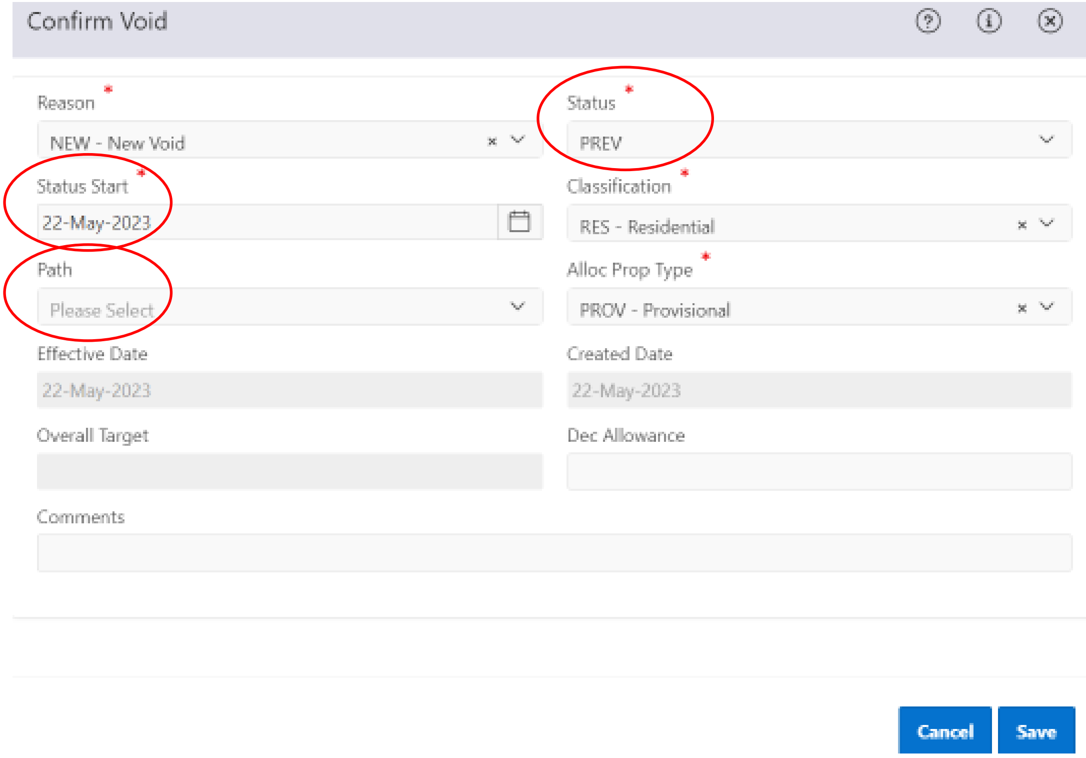
8.3 Confirm Voids

Note:
You can only complete this task if the void instance selected has a **Status** of PROV (provisional void).

- In "Voids", search for a record using the search or advanced search options
- "Row Action" the void you are looking to confirm and select "Confirm Void"



- Complete the "Confirm Void" wizard ensuring to change the void status, select the correct void path and enter the void status start date.

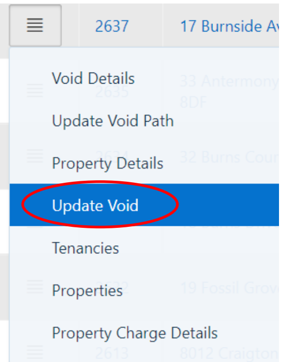


- Click "**Save**"

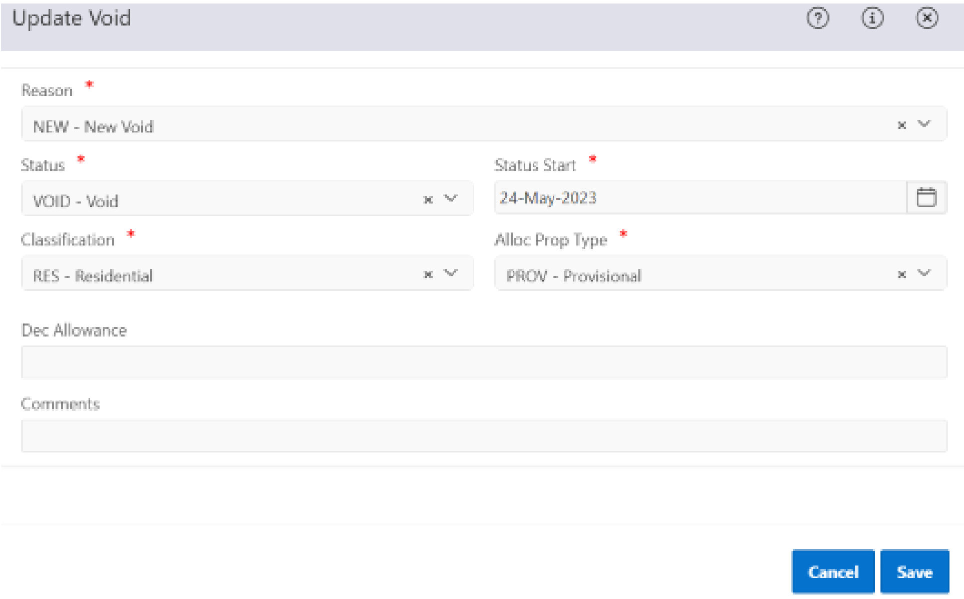
8.4 Update Voids

Note:
You cannot complete this task if the void instance selected has a **Status** of LET (property let), CLSD (property closed) or CANC (void cancelled).

- In “Voids”, search for a record using the search or advanced search options
- “Row Action” the void you are looking to confirm and select “Update Void”



- Complete the “**Update Void”** wizard

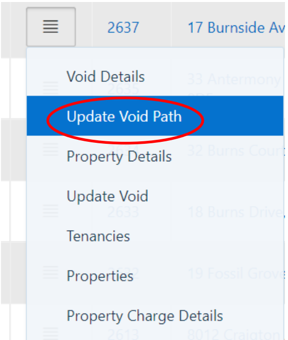


- Click “**Save”**

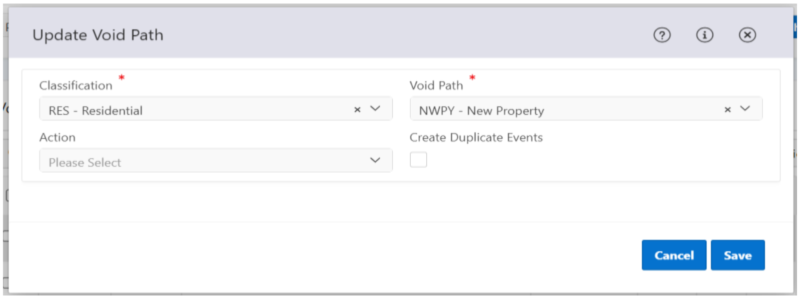
8.5 Update Void Paths

Note:
You can only complete this task if the void instance selected has a void **Path** assigned to it.

- In “Voids”, search for a record using the search or advanced search options
- “Row Action” the void which path needs updating and select “Update Void Path”



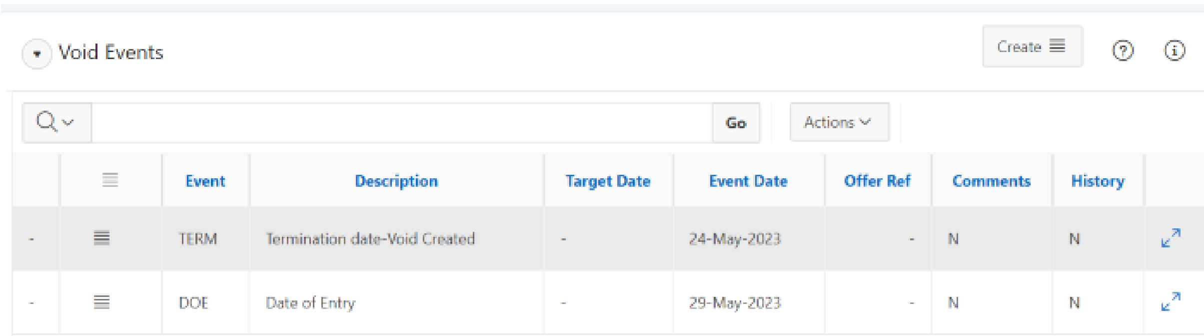
- Complete the “Update Void Path” wizard



- Click “Save”

8.6 View Void Events

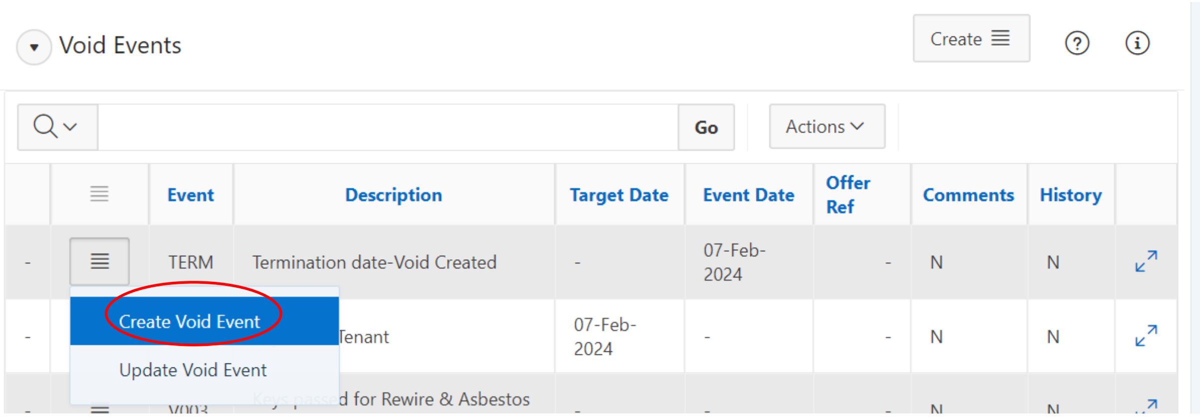
- In “Voids”, search for the record using the search or advanced search options
- Select the void you are looking to update the void events
- On the “Void Events” page, which should open automatically, scroll down and you should see the full list of void events created by the void path.



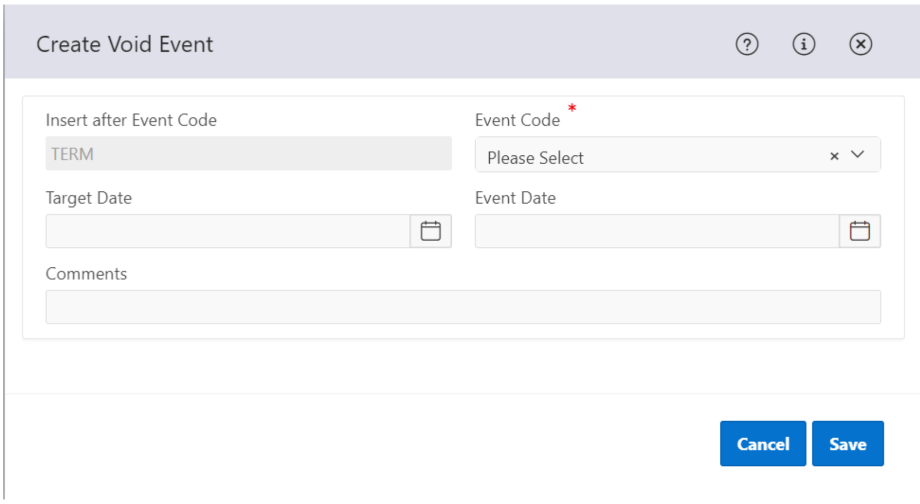
8.7 Create Void Events

Note:
If an event is linked to a void stage, the completion of one event will default a target date for the next event.

- In “Voids”, search for the record using the search or advanced search options
- Select the void you are looking to create the void event for
- “Row Action” the void event which comes before the one you want to create, and select “Create Void Event”



- Complete the “Create Void Event” wizard by entering the event code, event date and comments if required.

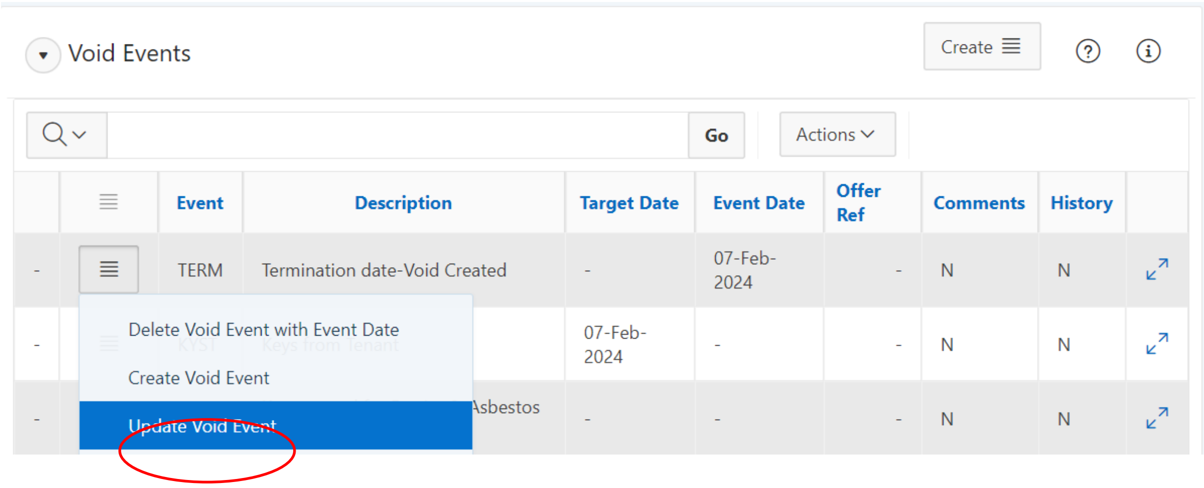


- Click “Save”

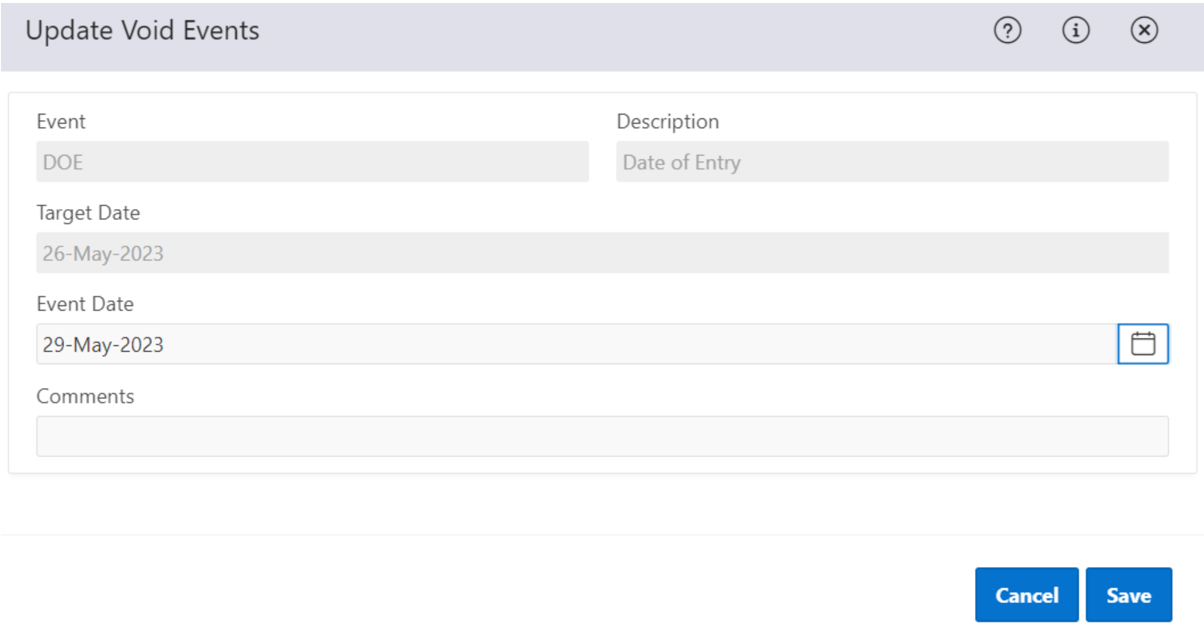
8.8 Update Void Events

Note:
If an event is linked to a void stage, the completion of one event will default a target date for the next event.

- In “Voids”, search for the record using the search or advanced search options
- Select the void you are looking to update the void events
- “Row Action” the void event you want to update and select “Update Void Event”



- Complete the “Update Void Event” wizard by entering the event date and comments if required.



- Click “Save”

9. Loading a CHR Application

See Allocations user guide.