

Allocations User Guide

Contents

Contents	2
1. Creating and Maintaining Applications	4
1.1 Creating a New Application	4
1.2 Application Details Subpage	5
1.3 List Entry Details Subpage	6
1.4 Involved Parties Subpage for Applications	7
1.5 Transfer Applicants	12
1.6 Correspondence Details Subpage	13
1.7 People Addresses Subpage for Creating Applications	14
2. Additional Application Information	16
2.1 Answering Application Questions	17
2.2 Outstanding Application Questions	19
2.3 Lettings Area Question	20
2.4 Update the Application List Entry Status	21
2.5 Notepads	22
3. Assessing an Application	24
3.1 On line assessments	24
3.2 Ad-hoc Application Assessment	24
3.3 Viewing Answers to Derived Questions	25
3.4 Viewing Household Type & Category Calculation, Points & Position	26
4. Updating The Household	28
4.1 Adding Household Members	28
4.2 Removing Household Members	29
4.3 Changing The Main Applicant	29
5. Medical Referrals	31
5.1 Creating Medical Referrals	31
6. Voids Overview	34
6.1 Key Terms	34
6.2 Example Void Components	35
6.3 View Void Details	35
6.4 Summary details	36
6.5 Void Details	36
6.6 Void Events	38
6.7 Viewing Event History	38
6.8 Void Other Fields	38
6.9 Void Offer History	38
6.10 Void Ref usals	39
6.11 Void Elements	39
6.12 Void Repairs	39
6.13 Void Status History	39
6.14 Void Interested Party Usages	39

7. Shortlists and Offers	40
7.1 Key Terms	40
7.2 Select Suitable Applicants for a Void Property	40
7.2.1 Shortlist	43
7.2.3 Restrictions	43
7.2.4 Override.....	43
7.2.5 Shortlist Notes	44
7.2.6 Viewing Shortlist Details.....	45
7.2.7 Bypassing Applicants.....	45
7.2.8 Offer Audit	46
7.3 Create Shortlist Offer	46
7.4 Create Manual Offer.....	47
8. Maintaining Offers	49
8.1 Overview.....	49
8.2 Update an Offer Stage	49
8.3 Recording the Outcome of an Offer.....	51
8.4 Accepting an Offer.....	51
8.5 Refusing an Offer.....	52
8.6 Withdraw an Offer	53
8.7 Reverse an Offer	54
8.8 Confirm Acceptance of an Offer	55
9. Make and Monitor Nominations	58
9.1 Creating a Nomination Request.....	58
9.2 Selecting Suitable Applicants for Nominations	60
9.3 Recording the Acceptance of a Nomination	61
9.4 Refuse a Nomination	64
9.5 Reject a Nomination	65
9.6 Reverse a Nomination.....	66
9.7 Withdraw a Nomination.....	67
9.8 Update a Nomination	68
10. Re- Registration	69
10.1 Searching For Registration Details.....	69
10.2 Re-registering Applications.....	70
11. System Icons	72

1. Creating and Maintaining Applications

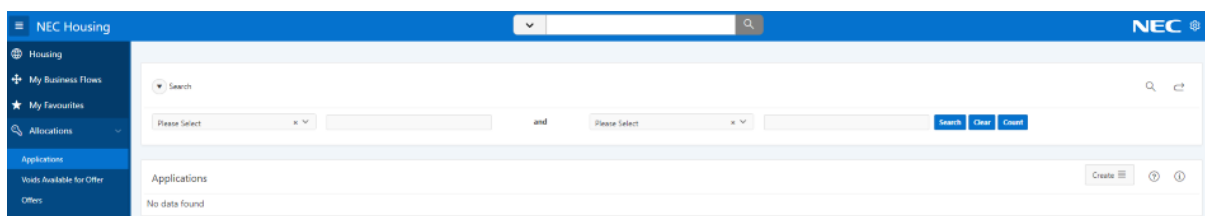
1.1 Creating a New Application

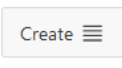

Note: It is good practice to query Northgate Housing to see if an application already exists prior to creating an application. This can either be done via MyPortal, ClientView or Allocations, Applications.

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

These are the steps to perform the task.

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



3. Click  Select  from the dropdown list.



4. The Create an Application wizard appears.

1.2 Application Details Subpage

Application

Received Date * 16-May-2023 Rent Account Details Select All

List	Description	Sel	+
REGISTER	General Needs	<input checked="" type="checkbox"/>	
TRANSFER	General Needs	<input type="checkbox"/>	
PRIORITY	Homeless Assessment	<input type="checkbox"/>	
LLIP	Lock Up	<input type="checkbox"/>	
GGS	Garage Ground Site	<input type="checkbox"/>	

model 1 - 5 of 5

Add Row Next Cancel

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

Rehousing List	Category	Category Start Date	List Status	Area Office
REGISTER	R_LOCAL	16-May-2023	UE - under entry	ALLOCOFF

row(s) 1 - 1 of 1

Previous Next Cancel

To complete this task, perform the following steps:


For each rehousing list displayed

1. Assign a category and category start date if appropriate. (Depending on configuration to reflect policy not all lists will allow a category to be assigned).
2. Amend the defaulted Status code (UE - Under Entry) if required and provided the system configuration allows.
3. Assign an Area Office code from the drop down list.
4. Click **Next**.

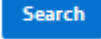
1.4 Involved Parties Subpage for Applications

To complete this task, perform the following steps:

All Applicants


1. Click the **Person search** icon  to display the Quick 'Person' search.
 (See below for alternative 'Tenancy' search for Transfer applicants).

Non-Tenant Applicants

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

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

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

3. If a match is found click **select** to return the record to the Involved Parties subpage.
4. If no person is returned click the Create Person button . This will launch the **Create Person** wizard.

The screenshot shows the 'Create Person' wizard in the NEC Housing system. The 'Person Details' step is active, indicated by a blue dot. The form contains the following fields and values:

- Surname: BROWN
- Forename: JODIE
- Gender: F - Female
- Date of Birth: 26-Dec-1996
- Title: MISS - Unmarried Female
- Known As Surname: (empty)
- Known As Forename: (empty)
- Initials: (empty)
- Geographic Origin: Please Select
- Ethnic Origin: Please Select
- Alt Ref: (empty)
- Marital Status: Please Select
- Language: (empty)
- Employer: (empty)
- OAP:
- Disabled:

Buttons for 'Next' and 'Cancel' are visible at the bottom right of the form.

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

- 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.

The screenshot shows the 'Create Person' wizard in the NEC Housing system. The 'Addresses' step is active, indicated by a blue dot. The 'Person Details' step is completed, indicated by a green checkmark. The form contains the following fields and values:

- Usage: (empty)
- Address: (empty)
- Start Date: (empty)
- Contact Name: (empty)

Buttons for 'Previous', 'Next', 'Cancel', and 'Save' are visible at the bottom right of the form.

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

The screenshot shows a close-up of the 'Usage' drop-down list. The selected option is 'CONTACT - Contact Address'.

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

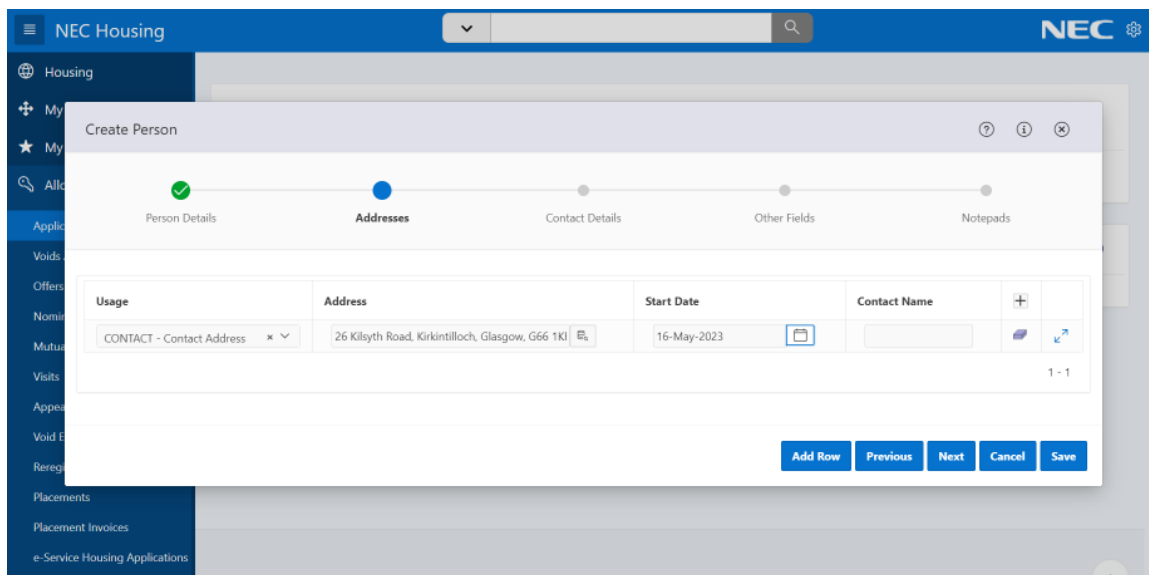
- Enter the relevant search criteria, which will typically be a combination of Building Number and Street and click on the **Search** button.

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

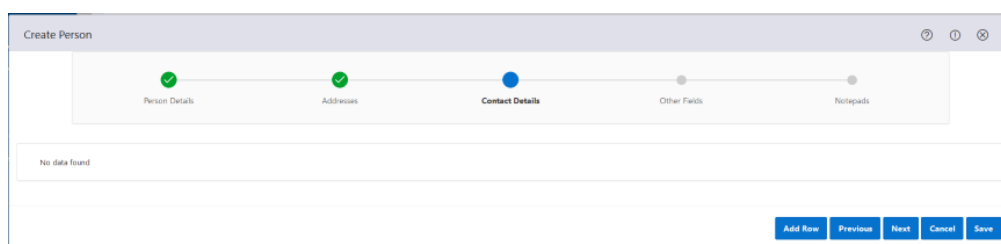
- Click on the Select label **Select** to choose the record.

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

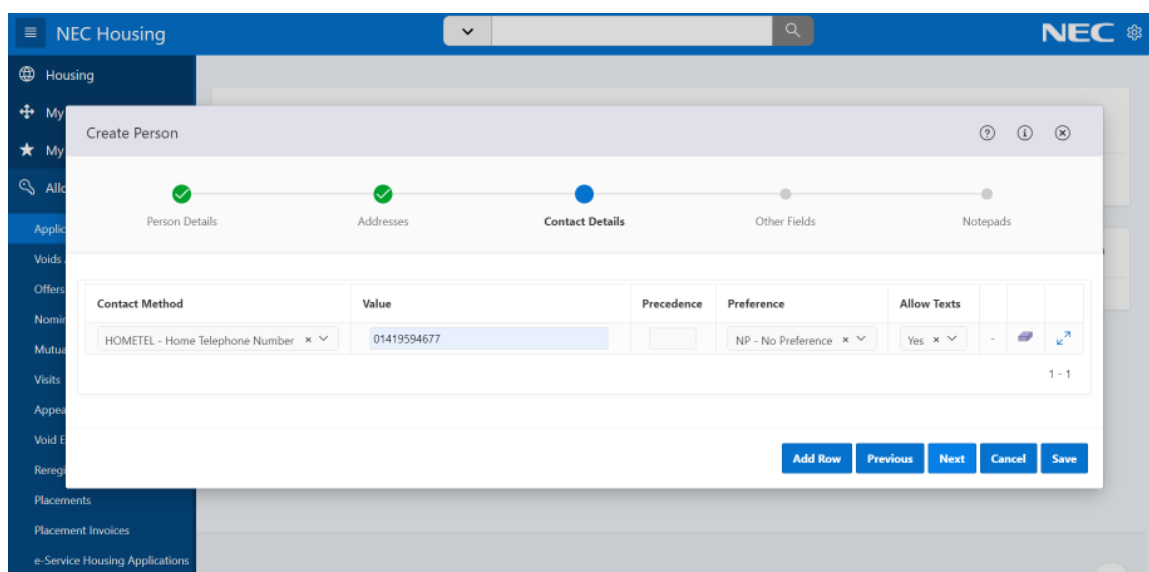
- If the address does not exist but the Street does then click on the Select label **Select** to choose the record from the Streets region. Any missing address data can then be entered and saved by clicking on the Save button.



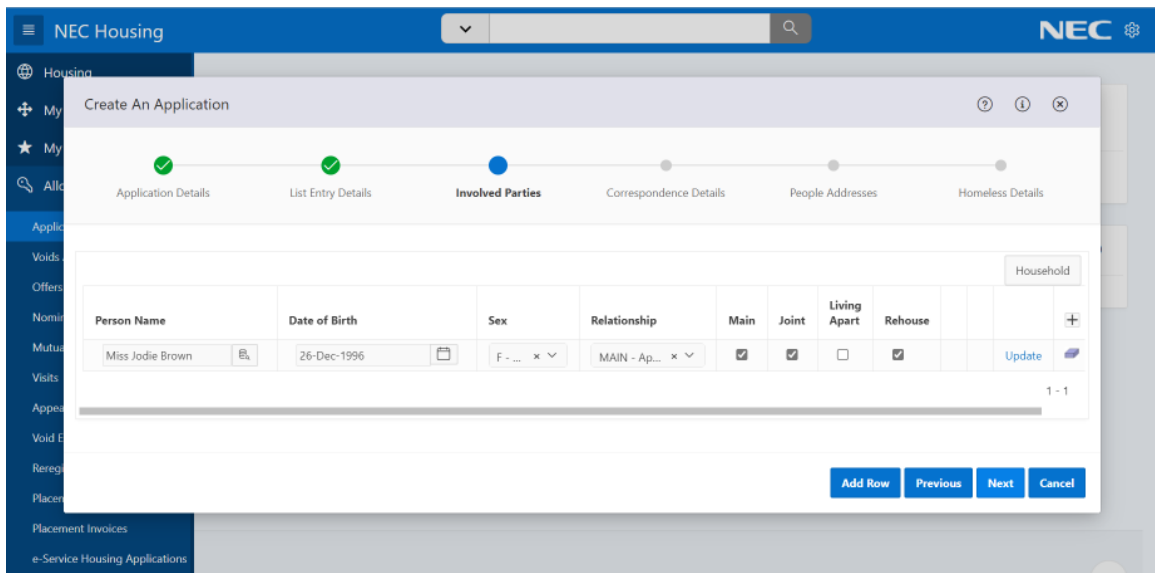
11. Enter the Start Date for the address and click the Next button.







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



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



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  button to commit changes.
17. Click , if required, and repeat the person search, using create and/or update for remaining members of household.
18. Click .

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.

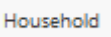

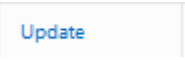


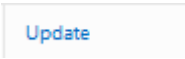
To complete this task, perform the following steps:

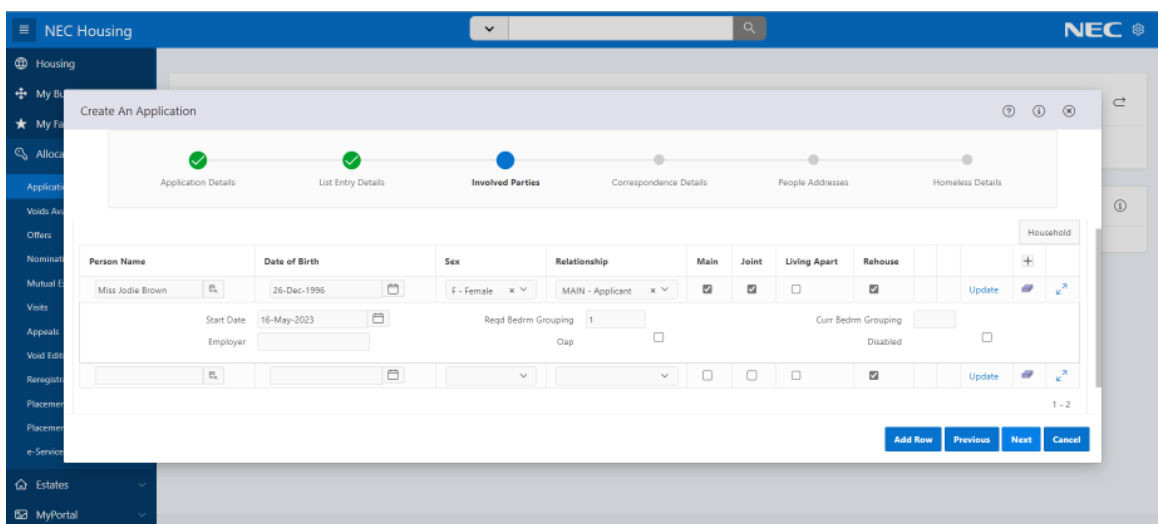
1. Enter known/required details of the tenant and click search

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

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

The tenant and any joint tenant details will be displayed:

3. Click the  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  to check and update person details if required. Click the **save** button to commit changes.
6. Click , 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  for remaining members of household.



8. Click 

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

1.6 Correspondence Details Subpage

The screenshot shows the 'Create An Application' subpage in the NEC Housing system. The progress bar indicates that the 'Correspondence Details' step is currently active. The form fields are as follows:

- Correspond Name:** MISS J BROWN
- Application Address:** 26 Kilsyth Road, Kirkintilloch, Glasgow, G66 1KR

Below the address field, there is a table of search results:


Refno	Address	Cur
19469	26 Kilsyth Road, Kirkintilloch, Glasgow, G66 1KR	<input type="checkbox"/>

At the bottom right of the form, there are buttons for 'Previous', 'Next', and 'Cancel'. A 'Select' button is also visible next to the address field.

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

If the application is for a Transfer type list the address associated with the tenancy will be defaulted.


To complete this task, perform the following steps:

1. For non transfer applicants click the **Application Address** search icon  and enter search criteria.
2. Matching addresses and streets are displayed.
3. If an address match is found click **Select**.
4. If the street only is found this may be selected to create a new address (see Structured Addresses).
5. After a new address is created click **Select**.
6. Click **Next**.

1.7 People Addresses Subpage for Creating Applications

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

To complete this task, perform the following steps:

1. Click **Copy to All**  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  .

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  to complete the wizard. Otherwise click on the Next button and enter the relevant Homeless details.

On saving the details the user will be returned to the Applications Summary page.

NEC Housing

Housing
 My Business Flows
 My Favourites
 Allocations
Applications
 Voids Available for Offer
 Offers
 Nominations
 Mutual Exchange
 Visits
 Appeals

Search

Please Select and Please Select Search Clear Count

Applications

Create

Go Actions

		Application Ref	Received	Name	Off	Nom	Ntp	Rfa	Status	
<input type="checkbox"/>		5170	16-May-2023	MISS J BROWN	N	N	N	-	NEW	

1 - 1


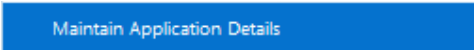
2. Additional Application Information

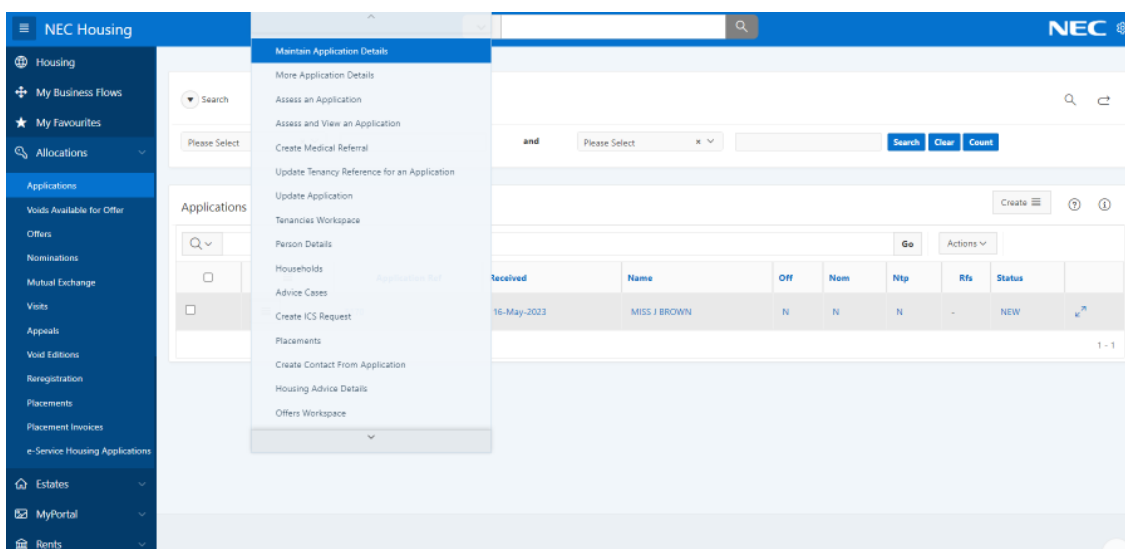
Once the application has been created it may be supplemented with additional details including:

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

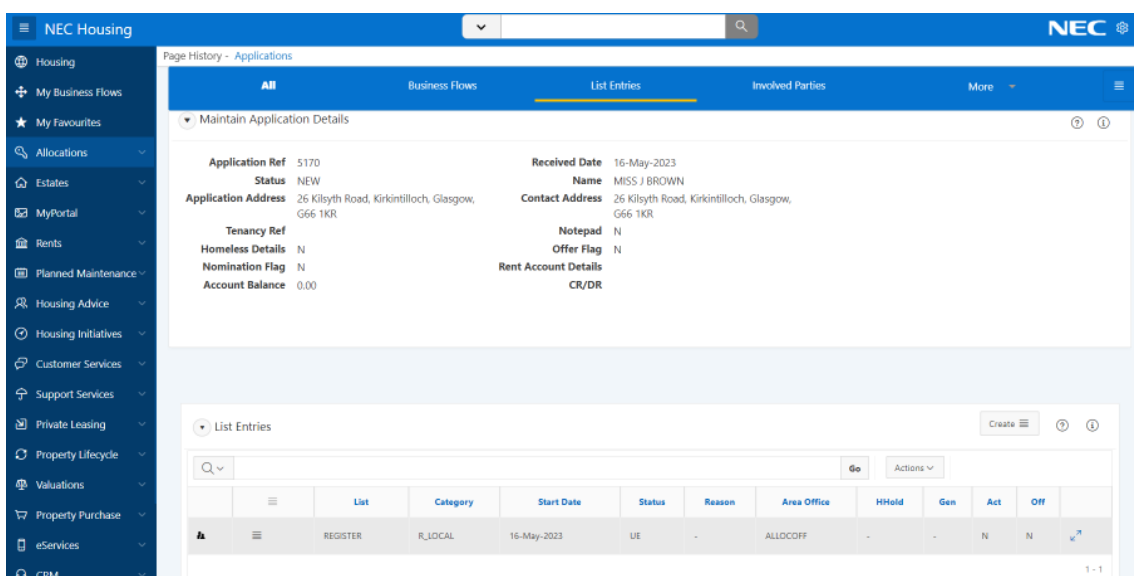
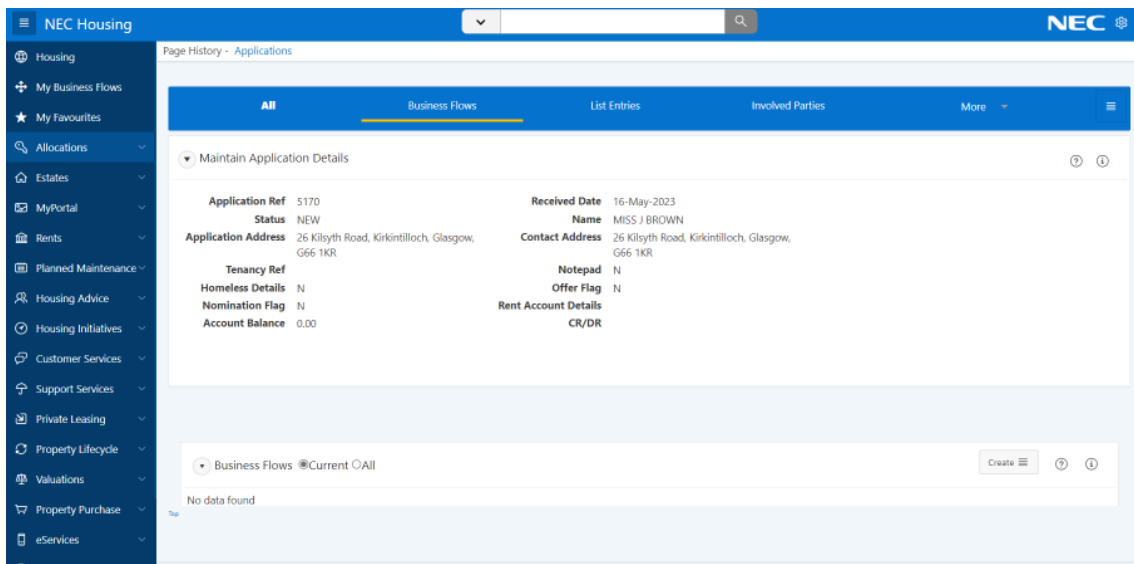
NOTE - The status of the application can be amended but all mandatory questions must be answered before an application can be given an active status, assessed and included in any shortlists.

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  which will then default to the **Maintain Application Details** page.



The Application Details region with a series of sub regions is displayed.



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

2.1 Answering Application Questions

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

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

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

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

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.

The screenshot shows a window titled 'Update Answer'. At the top, there is a search bar and a 'Questions' sub-region. Below this is a table with the following columns: Cat, Group, Parent, Question Reference, Description, Type, Answer, Required, and Remove Children. The table contains one row with the following data: Cat: HR, Group: HRP, Parent: N, Question Reference: 41, Description: Do you require ground floor accommodation?, Type: Y, Answer: Please Select, Required: , and Remove Children: . At the bottom right of the window, there are three buttons: Next, Cancel, and Save.

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

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

Parent and Child questions:

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

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

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

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

List Entries

List	Category	Start Date	Status	Reason	Area Office	Invited	Gas	Act	Off
TR	TRUNK	28-NOV-2016	UE	-	CENTRAL	-	-	N	N

Questions

Questions Search

Questions Answered Unanswered All

Cat	Par	Req	Question Reference	Description	Answer
CC	None	N	35	Are all the household members living together?	-
CC	None	Y	15	How many bedrooms are available for your use?	-
CC	None	Y	31	What type of property do you live in?	-
CC	None	N	32	If you live in a flat or maisonette, which floor are you on?	-
HR	None	N	44	What type of property do you want?	-
HR	None	Y	53	How many bedrooms do you require?	-

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**.

Questions Answered Unanswered All

Cat	Par	Req	Question Reference	Description	Answer
CC	None	N	35	Are all the household members living together?	-
CC	None	Y	15	How many bedrooms are available for your use?	-
CC	None	Y	31	What type of property do you live in?	-
CC	None	N	32	If you live in a flat or maisonette, which floor are you on?	-
HR	None	N	44	What type of property do you want?	-
HR	None	Y	53	How many bedrooms do you require?	-
HR	None	N	41	Do you require ground floor accommodation?	-
HR	None	N	40	Does any member of the household use a wheelchair?	-
HR	None	N	86	If rehoused take account of pet(s) (put in Additional Details)	-
HR	None	Y	45	Do you require a garden?	-
GA	None	N	23	If a medical priority has been awarded, what is the priority	-

2.2 Outstanding Application Questions

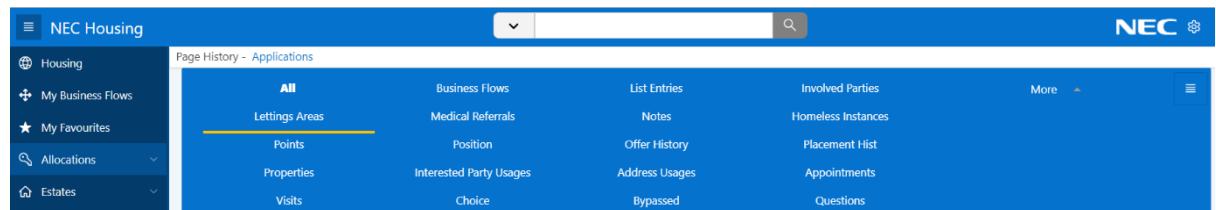
After answers to questions have been saved any questions that have not been answered will be displayed in the Unanswered Questions for the Application. **All mandatory involved party questions and general questions must be answered before the list entry status can be given a status that is active and 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

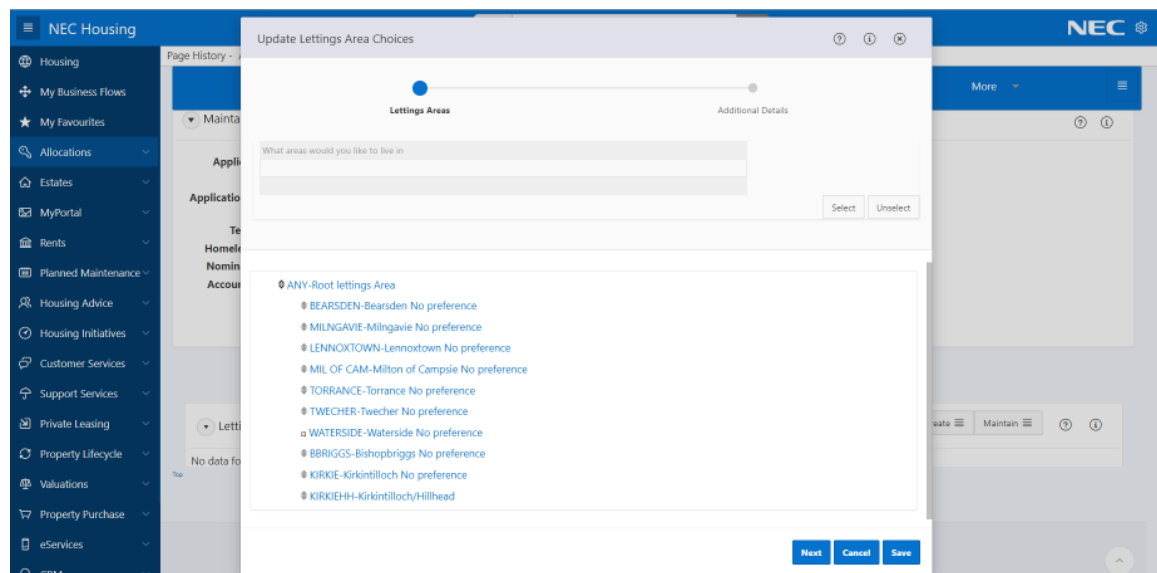
The Lettings Area Question is linked to a lettings area hierarchy to allow the recording of demand for different areas, area matching and mutual exchange matching.

To complete this task, perform the following steps:

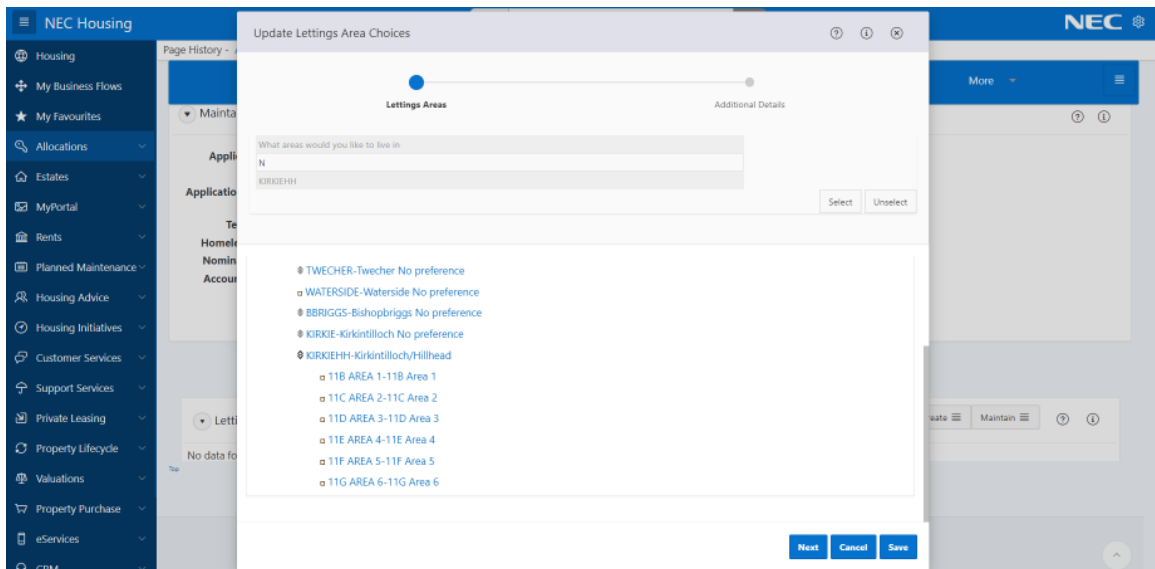
1. Use the Region Navigation bar to navigate to **More** then **Lettings Areas**



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



3. **Click the area** required, if necessary use the expand icon to open or close the area hierarchy. With the area required displayed on the right of the page choose **Select**. The display changes to insert the selected icon against the area and any child lettings areas. The **Next** button allows optional code, text, date or comment to be recorded.



4. **Repeat to select further areas.** Areas may be deselected by clicking and choosing unselect. The selected icon is replaced with an unselected icon.

5. Click **Save** to confirm the areas of choice.

The Lettings Areas Region now displays the lettings areas selected.

2.4 Update the Application List Entry Status

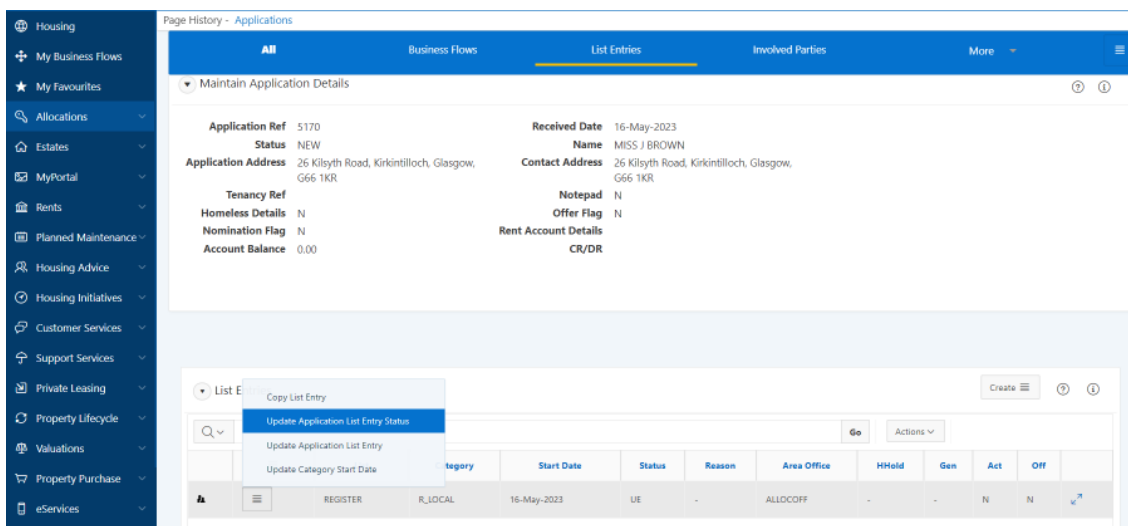
To complete this task, perform the following steps:

1. Navigate to the **List Entries Region** [List Entries](#).

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

3. In the List entries region and on the appropriate row, select

Update Application List Entry Status from the Actions list.



4. The Update List Entry Status wizard appears below.

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

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

7. Update the Lettings Areas if required.

8. Click .

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  Action from within the List Entries region for the relevant List.

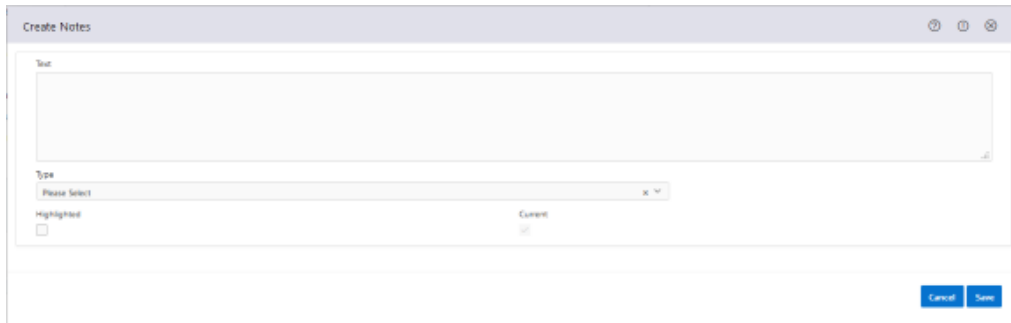
If the Status is being switched to Active the user will get an error message if any mandatory Questions have not been answered.

2.5 Notepads

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


The Notes region will display any notes created previously.

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



The image shows a 'Create Notes' dialog box with the following elements:

- Title:** A large, empty text area for entering the note's title.
- Type:** A dropdown menu with the text 'Please Select' and a small 'x' icon on the right.
- Highlighted:** A checkbox that is currently unchecked.
- Current:** A dropdown menu with the text 'Current' and a small 'x' icon on the right.
- Buttons:** Two buttons at the bottom right: 'Cancel' and 'Save'.

Click on the  button to save the notes.

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

3. Assessing an Application

3.1 On line assessments

Northgate 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.

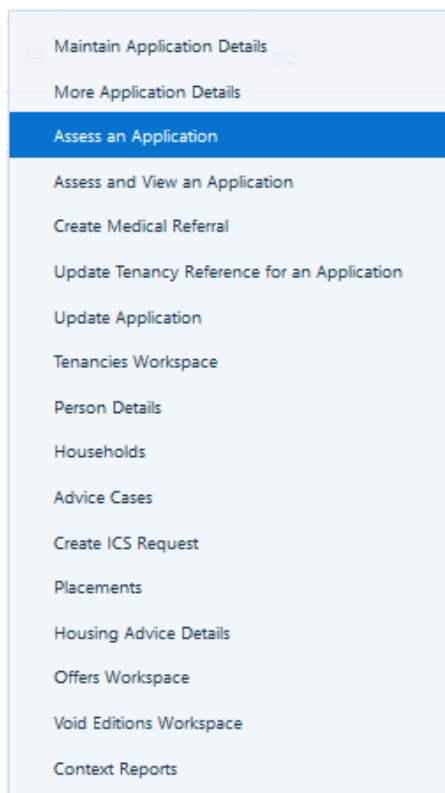
An overnight assessment of all applicants ensures that derived questions, which may pass information into other calculations such as household types to determine eligibility and priority, are kept up to date. Northgate Housing also supports the configuration to allow newly entered applicants to be assessed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

3.2 Ad-hoc Application Assessment

Only applications with an active list status can be assessed.

To complete this task, perform the following steps

1. Select **Assess an Application** or **Assess and View an Application** from the scrollable Actions box on the Application summary screen.

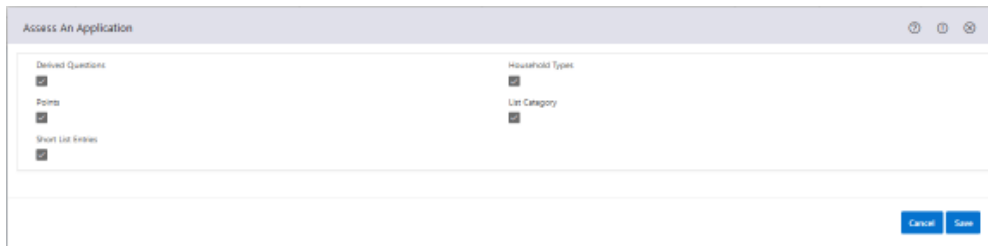



The Assess an Application region appears and displays

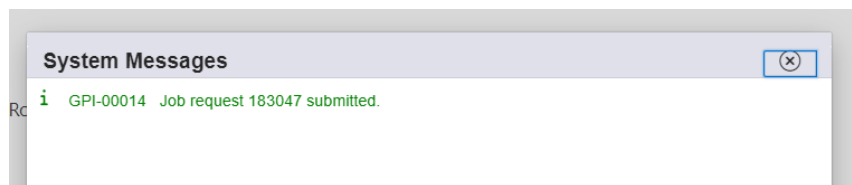
- Derived Questions;
- Household Types;

- Points;
- List Category;
- Shortlist Entries.

These are usually defaulted as selected but may be de-selected as required.



2. Click  .
3. Close the system message that gives the run id number.



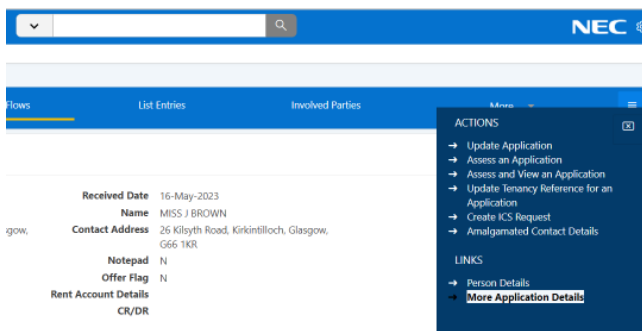
The **Assess and View** Action enables the user to examine the report that is generated in a new browser window for the operations selected. When satisfied close the report window.

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

3.3 Viewing Answers to Derived Questions

To complete this task, perform the following steps:

1. Navigate to **More Application Details** from Links in the details page of Maintain Application Details.



The answers sub-region will show the answers to Derived questions and other answers from questions which have been configured to show in this region.

Question	Answer
Residency/access arrangement?	N
Current Circumstances	PARENTS
Type of accommodation	MAIN
Steps leading to front door?	3
Floor of front door	GROUND
Sole use of garden	Y
Separate/Public rooms	1
Double Over 10.2 sqm	2
Single bedroom under 10.2 sqm	1
Combined living/bedroom	0
Separate living / public rooms	0
Doub rooms over 10.2sqm Exclu	0
Single under 10.2 sqm's excl	0
Combined living/bedroom exclu	0

3.4 Viewing Household Type & Category Calculation, Points & Position


To complete this task, perform the following steps:

1. Navigate to the Maintain Application Details Page
2. Navigate to the List Entries region of Maintain Application Details. The Household Type code and category and category start date are displayed if previously entered.

List	Category	Start Date	Status	Reason	Area Office	HHold	Gen	Act	Off
REGISTER	R_LOCAL	16-May-2023	ACTV	-	ALLOCOFF	SING01G	-	Y	N

3. Navigate to the Points region which contains sub regions for each list entry and points category within the list.

List	Category	Start Date	Status	Area Office	Reg Date	Hhold Type	Base Pts
REGISTER	R_LOCAL	16-May-2023	ACTV	ALLOCOFF	16-May-2023	SING12G	111

Use the Parent/Child icon  to expand the Region. For each Points Category use the Parent/Child icon to see the Points Rules Details, which will show how the total points have been calculated for each Category.

Category	Description	Base Pts	Proposed Pts
MEDICAL	MEDICAL PRIORITY	5	
LACKING	LACKING FACILITIES	55	

Seq	Category	Base Points	Proposed Points
10	Medical Points	5	

- Navigate to the Position Region and using the parent and child icon to view the Allocations Property Types (APT) sub-region for the particular shortlist required. Select the Matched sub-region to see all the APTs to which the application has been matched and the position on the Shortlist.

Position

Category	Description	Quota
CDMB	COMMOND LIST	N
HRGG	HOUSING REGISTER	N

Allocation Property Types

Matched

APT Code	Description	List	Points	Category	Position	Eligible	Manual Action
2BEMOHT	2 BED BUNGALOW MONTGOMERY	HT	50	GENERAL	-	Y	-
2BEMOHT	2 BED FLAT (5-HALTERS) MONTGOMERY EST	HR	50	GENERAL	-	Y	-

4. Updating The Household

4.1 Adding Household Members

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

Select the Involved Parties region Involved Parties.

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


The screenshot shows the 'Involved Parties' table with two entries:

Person Name	Sex	Age	Relationship	Start Date	End Date	Group	Room
Mr Alan Partridge	M	63	APPL	25-APR-2018	-	1	-
Mr Jan Partridge	F	47	PART	25-APR-2018	-	-	-

Below the table is the 'Create Involved Party' form with the following fields:

- Person Name: [Text Field]
- Contact Address: 35 Huddersfield Road, Monkpenning Estate, East Town, F40 7GG
- Date of Birth: [Date Picker]
- Gender: [Please Select]
- Geographic Origin: [Please Select]
- Ethnic Origin: [Please Select]
- Relationship: [Please Select]
- Start Date: 25-APR-2018
- Joint Applicant Indicator:
- Living Apart Indicator:
- Relinquishing Required Indicator:
- Required Bedroom Grouping: [Text Field]
- Current Bedroom Usage: [Text Field]
- Correspondence Name: MR AG PARTRIDGE
- Employer: [Text Field]
- Disability:
- Language: [Please Select]
- Nationality: [Please Select]
- Sexual Orientation: [Please Select]
- Religion: [Please Select]
- Martial Status: [Please Select]
- Person NI Number: [Text Field]

Buttons: Next, Cancel, Save

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

The screenshot shows the 'Quick Person Search' form with the following sections:

- Person Details:**
 - Person Ref: [Text Field]
 - Surname: [Text Field]
 - Surname Prefix: [Text Field]
 - Tenancy Ref: [Text Field]
 - DoB: [Date Picker]
 - NI Number: [Text Field]
 - Language: [Please Select]
 - Telephone Number: [Text Field]
 - End Reason: [Please Select]
 - End Date Between: [Date Range Picker]
 - Current Person: Yes No All
 - Current Application: Yes No All
 - Check Former Names:
 - Forename: [Text Field]
 - Initials: [Text Field]
 - Application Ref: [Text Field]
 - Title: [Please Select]
 - Account Ref: [Text Field]
 - Gender: [Please Select]
 - Alternative Ref: [Text Field]
 - Marital Status: [Please Select]
 - Contact Value: [Text Field]
 - Current Tenancy: Yes No All
 - Exclude Duplicates: Yes No
- Address Details:** [Text Field]
- Other Fields:** [Text Field]

Buttons: Search, New Query, Count, Cancel

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.

4.2 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.

The first screenshot shows a table titled 'Involved Parties' with columns for Person Name and Sex. An action menu is open over the first row, with 'End Involved Party' selected. The second screenshot shows the 'End An Involved Party' form with fields for Person Name, Date of Birth, Start Date, End Reason, Contact Address, Relationship, End Date, and Correspondence Name.

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

4.3 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.

The screenshot shows the 'Involved Parties' table with columns for Person Name, Sex, Age, Relationship, Start Date, End Date, Group, and Room. The action menu for the first row is open, and 'Change Main Applicant for Application' is selected.

Change the Main Applicant

Current Applicant
Mr Alan Pennington

End Date

End Reason

New Applicant

Correspondence Name

Employer
NDRTH NORFOLK DIGITAL

Gap

Disabled

Language

Geographic Origin

Ethnic Origin

Nationality

Sexual Orientation

Religion

Person NI Number
AB123456

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

5. Medical Referrals

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

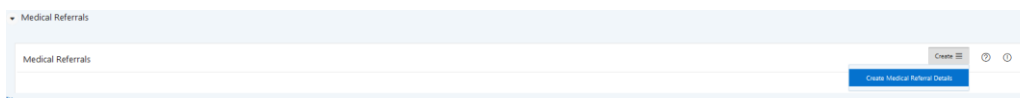
The Medical Referrals region enables you to maintain this information and displays details such as, the referral date, the current status, and the result of the referral.

You can access this region from the Application Details page within Allocations, from where you can view, create, update and delete medical referrals.

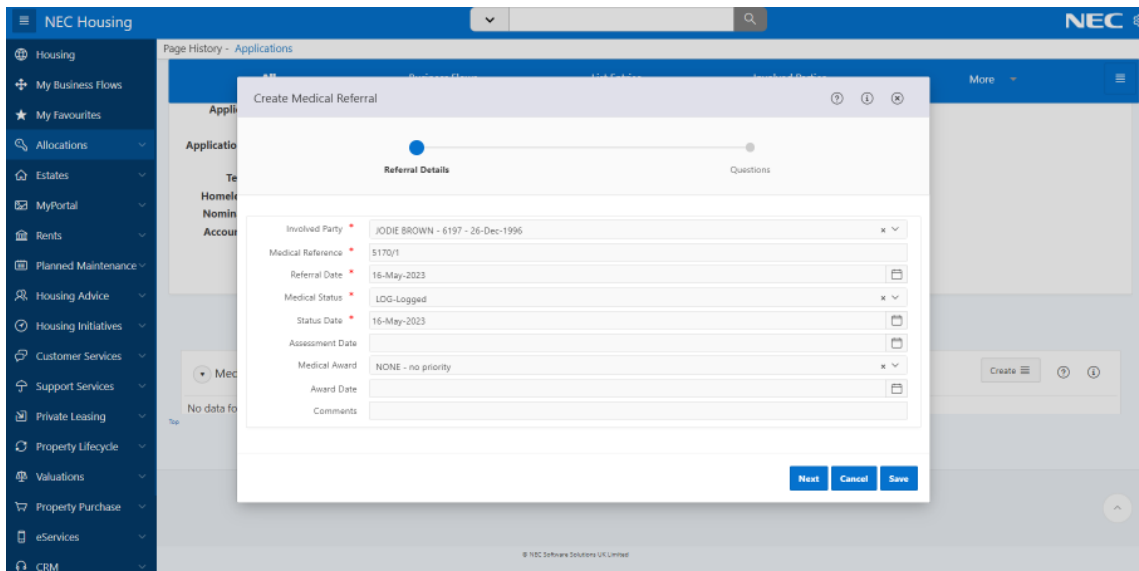
5.1 Creating Medical Referrals

To complete this task, perform the following steps.

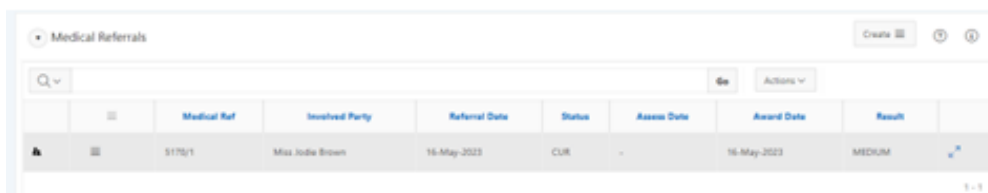
1. Click **Housing**.
2. Click **Allocations**.
The default summary page appears.
3. Click **Applications**.
The Applications summary page appears.
4. Enter your search criteria in the **Search** subregion.
If the default search options do not meet your needs, click Advanced Search and enter more specific search criteria.
5. Click **Search**.
The records that meet your search criteria appear in the Applications region.
6. **Check the select box** for the record.
Alternatively, click the Application Reference and go to step 8.
7. Select **Application Details** from the **Maintain** list in the region banner.
The Application Details page appears.
8. Click **Medical Referrals**. [Medical Referrals](#)
The system scrolls down to the Medical Referrals region.
9. Click in the **Medical Referrals** region banner.
The Medical Referrals region opens.
10. Select **Create Medical Referral Details** from the **Create** list in the region banner.
The Create Medical Referral **wizard** appears.



11. Enter the relevant data in the Create Medical Referral wizard and click on the Save button (we **do not** have Medical Questions to be answered).



The Medical Referrals region then displays the saved record. NOTE that the Medical Ref is generated by the system and allows for multiple referrals per application.



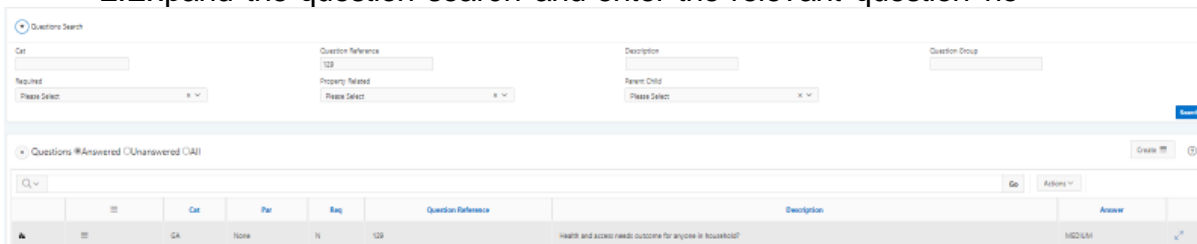
Next Steps of a Medical Ref

Once a medical referral has been completed, please then update the relevant questions with the answers from the medical referral outcome, i.e. if an extra bedroom or medical points have been awarded. Relevant questions are in the table below.

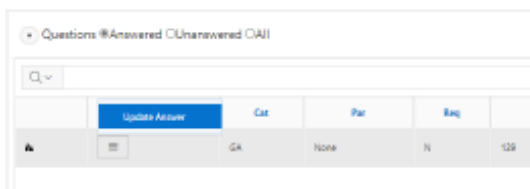
Question Ref	Question
Q129	Medical Points
Q1200	2 nd Household Member Medical Points
Q130	Additional Bedroom

To update a question;

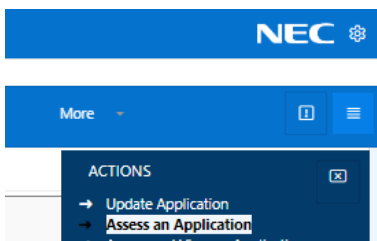
1. Click Questions (within the application)
2. Expand the question search and enter the relevant question no



3. Use the row action to update answer



4. Use the Action's button (top right) to Assess the application



5. Application points/bedroom calc will now be in line with the medical referral

6. Voids Overview

6.1 Key Terms

Void Instance	The time period covered when a property is void or about to be void
Void Event	An action that takes place during the void process which can have target and actual dates completed, e.g. Keys Received, Inspection, Gas Check
Void Event Group	Group together associated events, to display the latest event within that void event group
Void Path	A series of common default Void Events grouped together sequentially in the order they are expected to happen e.g. Standard Void, Major Work, Illegal Occupants. They can be assigned to a Void Classification
Void Classification	Used to classify different types of void for management, monitoring and statistics e.g. Routine Void, Modernisation, Demolition. Controls the Void Paths available
Void Group	Is linked to the property type for management and statistics to separate voids of different types e.g. Residential, Garages, and Temporary
Void Stage	Two Void Events can be linked together in order to create a target date for completion of the 2nd event
Void Target	Target date for the conclusion of a Void Event that can be used for monitoring
Void Status	Used to control whether a property is current and offerable e.g. Available for Offer, Due for Demolition
Allocation Property Type	Used in Allocations to match applicants Property, to suitable void properties e.g. 3BHMONT = 3 bed house on the Montgomery Estate and will match to applicants eligible for that type of property

	and area
Free Event	An Event on a Void Path that indicates the property is available for offer. The property is then displayed on Voids Available for Offer (Allocations only)

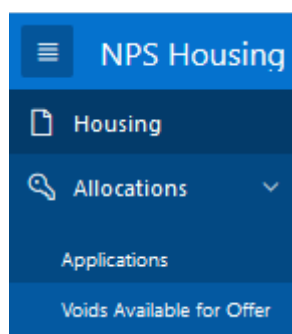
6.2 Example Void Components

VOID EVENTS

Void Event Code	Description
TERM	Termination Date – Void Created
KYST	Keys Received From Tenant
V006	Keys Passed to Voids Team
KYSH	Keys Back to Housing
BKIN	Date of Book-In
DOE	Date of Entry

6.3 View Void Details

Select **Voids Available for Offer** from the Allocations menu bar.




Note: Voids displayed here are restricted to those which have been confirmed and assigned to a path which includes the 'Free' event that indicates a void may be offered to an applicant. Some voids such as those awaiting demolition or long term refurbishment will not be in such paths and cannot be viewed here. All voids can be viewed using the Voids region in Northgate Estates.

Use **search** or **advanced search** to retrieve one or more properties. The region displays the following region fields.

Property Address	Status	Status Start	Expiry Date	Free Date	APT Code	Shortlet Exits
22 Dean Street, Saumarez Estate, First Town, Newhall	CONF	23-JAN-2023	30-APR-2023	-	HQSRM	N
21 Huddersfield Road, Montgomery Estate, First Town, Newhall, F10 7DD	CONF	28-OCT-2021	-	-	288WCHT	N
23 Huddersfield Road, Montgomery Estate, First Town, Newhall, F10 7GG	CONF	28-OCT-2021	-	-	288WCHT	N
27 Huddersfield Road, Montgomery Estate, First Town, Newhall, F10 7GG	CONF	28-OCT-2021	-	-	288WCHT	N
28 Huddersfield Road, Montgomery Estate, First Town, Newhall, F10 7DD	CONF	28-OCT-2021	-	-	288WCHT	N
29 Huddersfield Road, Montgomery Estate, First Town, Newhall, F10 7GG	CONF	28-OCT-2021	-	-	288WCHT	N
26 Spring Street, Walker Estate, First Town, Newhall, F10 7DB	CONF	28-OCT-2021	-	-	288WCHT	N
27 Spring Street, Walker Estate, First Town, Newhall, F10 7DB	CONF	28-OCT-2021	-	-	288WCHT	N
28 Spring Street, Walker Estate, First Town, Newhall, F10 7DB	CONF	28-OCT-2021	-	-	288WCHT	N

6.4 Summary details


Use the **expand** icon  to view summary details for the void including the property reference, void reference and number of days void.

Property Address	Status	Status Start	Expiry Date	Free Date	APT Code	Shortlet Exits
22 Dean Street, Saumarez Estate, First Town, Newhall	CONF	23-JAN-2023	30-APR-2023	-	HQSRM	N

Property Ref	30322	Void Ref	1022	Total Offers	0
Homeless Shortlet Status	Y	Current Offer	N	Days Absence	
Void Date	23-JAN-2023	Void Group	HQST	Void Days	589
Comments		Area Office	WEST	Sit Created By	
Site Created Date					



6.5 Void Details

To see more information:

Click the Row Actions Button  Void Details from the Row Actions Drop down list (or click on the property address).

Voids Available For Offer

Search: [] Go Action

<input type="checkbox"/>		Property Address
<input type="checkbox"/>		22 Dean Street, Saumarez

- Void Details
- Property Details
- Create Manual Offer
- Retrieve Existing Homeless Shortlist
- Complete Homeless Shortlist
- Select Suitable Applicants
- Context Reports

All Void Events Other Fields Interested Party Usages Offer History Void Path History Event Groups Void Status History Referrals Appeals Elements Void Editions Offerable Rents Notes **Void**

Page History - Voids Available for Offer

Actions: Update Void Path, Update Void

Links: Properties, Templates, Property Change Details

Void Details	
Void Ref	1022
Property Ref	30322
Address	22 Dean Street, Saumarez Estate, First Town, Newhall
Void Status	CONF
Status Start	23-JAN-2023
Void Group	HQST
Void Path	Homeless Classification
Void Class	HQST
Area/Prop Type	HQSRM

The Voids Details region with a series of sub regions is displayed. (The Void Events region is opened.) Where data exists a 'Y' is displayed in the Region Navigation bar which may be used to access the sub region.

All Void Events Other Fields Interested Party Usages Offer History Void Path History **Event Groups** Void Status History Refusals Repairs Elements Void Editions Offerable Rents Notes [More](#) ▲
Page History - [Voids Available for Offer](#)

6.6 Void Events

The Void Events region displays the event details of the void in context. It also provides you with the ability to create new void events and maintain existing ones.

The screenshot shows a web interface for 'Void Events'. At the top, there is a search bar labeled 'Void Events Search'. Below it, the main area is titled 'Void Events' and contains a table. The table has the following columns: Event, Description, Target Date, Event Date, Offer Ref, Comments, and History. There are two rows of data in the table. The first row has 'VOID' in the Event column, 'Property Void' in the Description column, and '00 JANU 2005' in the Event Date column. The second row has 'APL' in the Event column, 'Available for Let' in the Description column, and '30 APR 2005' in the Event Date column. Each row has a small icon to its left and a small icon to its right. At the bottom right of the table, there is a page indicator '1 - 2'.

Event	Description	Target Date	Event Date	Offer Ref	Comments	History
VOID	Property Void	-	00 JANU 2005		- N	N
APL	Available for Let	30 APR 2005	-		- N	N

Void events are associated with defined void paths, some events are triggered by actions elsewhere such as entering a Notice or making an offer and the eventual letting. Target dates may be generated automatically where two events are linked as a void stage and the completion of the first event triggering a target for the latter event. Additional Events that are not part of a standard path may be inserted manually. The progression of the void is made by entering the actual date that the event is completed.

The expand icon may be used to see who amended a void event and when this took place.

6.7 Viewing Event History

If a void event displays the parent child icon at the beginning of the row this indicates history exists. Clicking the icon will display that history. (History is recorded when an automatically generated event target date has been adjusted and a mandatory reason entered.)

6.8 Void Other Fields

The Void Other Fields region displays the other field details of the void in context. It also provides you with the ability to insert data and maintain the existing other fields.

History, if appropriate, is indicated by the parent/child icon and can be used to view change history. The expand icon will display the last modified details for the current value.

A value may be entered or amended by selecting Update Voids Other Field Value from the Row Actions drop down list.

6.9 Void Offer History

The Offer History region displays details of any offers made to applicants of the void in context. The expand icon can be used to display details of the applicants address.

6.10 Void Refusals

The Refusals region displays refusal reason details of any offers that have resulted in a refusal. The expand icon can be used to display more offer details.

6.11 Void Elements

The Elements region displays the element details for the void. The 'expand' icon may be used to display further details including the creation and modified data, element groups and location.

6.12 Void Repairs

The Repairs region, if applicable, displays repairs raised in respect of the void in context.

6.13 Void Status History

The Void Status History region displays previous statuses and indicates when they were changed and by whom.

6.14 Void Interested Party Usages

The Interested Party Usages sub region displays details, if applicable, of any Interested Parties such as a Scheme Manager, Inspector or Architect associated with the void in context. The Create drop down menu can be used to select Create Interested Party Usage. The expand icon will display any text comments recorded with the Interested party.

7. Shortlists and Offers

7.1 Key Terms

Shortlist	Links the Household Types to eligible Allocations Property Types and the priority of any categories
Quota	Northgate Housing can be set up to prompt or force users to select from specific Shortlists
Bypass Reason	A code to identify why an applicant was not selected when higher on the list than the selected applicant e.g. Location of 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, firm 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

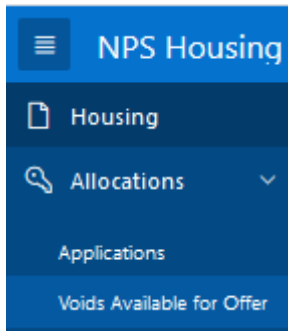
An Organisation will configure one or more Priority Schemes which will determine an Applicants priority for a particular property. An applicant's requirements may be entered to record what size, type and area an applicant wishes to be matched to. The Organisations Eligibility scheme will determine whether an application is eligible for particular property types. Northgate Housing uses these rules to determine an applicant's position in respect of a property within one or more Shortlists. In Choice Based Letting rehousing lists the applicants' expressions of interest are also used to refine the Shortlist.

7.2 Select Suitable Applicants for a Void Property

1. Click **Housing**.
2. Click Allocations.

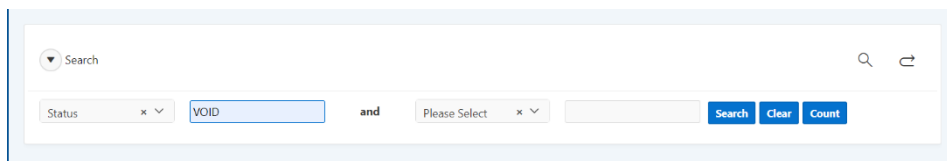
The default summary page appears.

3. Click Voids Available for Offer.



The Voids Available for Offer summary page appears.

4. Enter **your** search criteria in the Search subregion.



If the default search options do not meet your needs, click Advanced Search and enter more specific search criteria. For further information, see either the Search or Voids Available for Offer Advanced Search topics.

5. Click **Search**.

The records that meet your search criteria appear in the Voids Available for Offer region.

Voids Available For Offer									
		Property Address	Status	Status Start	Expect Date	Free Date	APT Code	Shortlist Exists	
<input type="checkbox"/>		74 Burns Court, Kirkintilloch, Glasgow, G66 2NR	VOID	15-May-2023	-	-	PROV	N	

6. On the appropriate property address Select **'Select Suitable Applicants'** from the Row **Actions** list.

<input type="checkbox"/>	Retrieve Existing Shortlist	gow, G61	VOID	02-Jun-2023	03-Jul-2023	30-May-2023	3SDH1BG	N	
<input type="checkbox"/>	Complete Shortlist	G61 2HH	VOID	12-Jun-2023	02-Jul-2023	12-Jun-2023	11ET1GG	Y	
<input type="checkbox"/>	Select Suitable Homeless Applicants	74 Burns Court, Kirkintilloch, Glasgow, G66 2NR	VOID	19-Jun-2023	02-Jul-2023	12-Jun-2023	2TFL10BG	Y	

The Select Suitable Applicants Search appears. This contains sub regions for Shortlist, Restrictions, Elements and Override.

Select Suitable Applicants
?
!
✕

Advanced Search Quick Search Last Query

▼
Short List

Property Address 74 BURNS COURT, KIRKINTILLOCH, GLASGOW, G66 2NR

APT Code 2TFL10BG

Short List * SLG - General ✕ ▼

Eligible Applicants Only

Exclude Bypassed Applicants

Exclude Refused Applicants

Interested Applicants Only

▶
Restrictions

Search
New Query
Count
Cancel

7. Enter the criteria in the Select Suitable Applicants Search and click Search.

Any applicants who match the criteria selected will be returned.

Applicants
Create
?
!

Go
Actions

	App Ref	Name of Applicant	Bypass	Pos	Category	Start Date	Points	Reg Date	List	Elg	
☰	5170	MISS J BROWN			R_LOCAL	16-May-2023	111	16-May-2023	REGISTER	Y	↗

1 - 1

7.2.1 Shortlist

If the Shortlist Category Code has not defaulted or you wish to use another shortlist select the appropriate shortlist from the drop down menu.

The 4 check boxes are defaulted in the context of the void but may be amended. (See later notes)

Select Suitable Applicants ? ⓘ ✕

Advanced Search Quick Search Last Query

▼ Short List

Property Address 74 BURNS COURT, KIRKINTILLOCH, GLASGOW, G66 2NR

APT Code 2TFL10BG

Short List * SLG - General ✕ ▼

Eligible Applicants Only

Exclude Bypassed Applicants

Exclude Refused Applicants

Interested Applicants Only

▶ Restrictions

Search
New Query
Count
Cancel

7.2.3 Restrictions

If the Shortlist is configured to allow default restrictions to be applied these will be displayed. (This only applies to the Additional Bedrooms, Homeless, Medical and Nominations lists.)

Below is an example for the Additional Bedroom's List.

▼ Restrictions

Question Ref	Description	Opr	Answer	Select
<input type="text" value="130"/>	H&A bedroom requirement	= ✕ ▼	<input type="text" value="Yes"/> ✕ ▼	<input checked="" type="checkbox"/>
<input type="text" value="107"/>	Reason for additional room	= ✕ ▼	<input type="text" value="Y"/>	<input checked="" type="checkbox"/>
<input type="text" value="108"/>	No reason for extra room	= ✕ ▼	<input type="text" value="Yes"/> ✕ ▼	<input checked="" type="checkbox"/>

Add Row

7.2.4 Override

The Override sub region displays elements used as part of the matching rules. In some circumstances they may be overridden. (See later notes)

Override

Element	Attribute	Value	Sel
DWELLING	MAI	-	<input checked="" type="checkbox"/>
NEEDS_TYPE	NT_GEN	-	<input checked="" type="checkbox"/>
LAR	4E MAINSER	-	<input checked="" type="checkbox"/>
BEDS	-	2	<input checked="" type="checkbox"/>

1 - 4

7.2.5 Shortlist Notes

A Shortlist determines the order in which applicants are retrieved. They may be configured to order by a Rehousing List Category / banding, points or a combination of both. Rehousing List Categories may be calculated automatically or assigned manually. Applicants of equal priority are sorted according to their registration date and time with the oldest application given a higher place.

Shortlist check boxes are defaulted.

The Eligible Applicants Only checkbox is set to on. This might be amended if no eligible applicants were retrieved. For example bungalow eligibility may exclude applicants under 60. If no applicants are shortlisted the shortlist can be run again with this checkbox set to off.

Exclude Bypassed Applicants will be set to on if an offer has been previously made and in the making of that offer some applicants were bypassed. It may be set to off to reveal applicants who were previously bypassed.

Exclude Refused Applicants will be set to on if an offer has been previously made and refused so that the applicants are not shortlisted again. If many offers have been made or changes have been made to the property this can be set to off so that previously refused applicants display on the shortlist.

Interested Applicants Only is set to on when the property has been advertised as part of a Choice Based Letting advert cycle. Only applicants, who match, are eligible and have expressed an interest in the property will shortlist. If no interest is expressed the check box may be set to off and applicants who match and are eligible will shortlist.

Restrictions are displayed when a Shortlist Category is selected. Default questions may be used to apply a filter to the Shortlist so that only applicants who meet the criteria specified are displayed. For example if ground floor flats are eligible for all singles and couples but you wish to restrict to applications where at least one is over 55 years of age an Age of Eldest Applicant may be set to filter on applicants ≥ 55 . Default operands and default values may be amended if appropriate.

Additional questions may be added to create a restriction.

Some Shortlists may be specified to automatically use a restriction which may be modified to remove or amend it.

You may combine functionality. For example Eligible Applicants Only may be switched off and an Age restriction applied.

The Override sub region may be amended to switch off a matching rule. Switching off a property type element while leaving bedroom size and area matching elements in place would retrieve applicants who have only asked for bungalows when Shortlisting for a flat.

7.2.6 Viewing Shortlist Details

This page contains 4 regions

Applicants (Y) Restrictions (Y) Elements (Y) Override (Y)

The Applicants region lists all the applicants that met the Shortlist criteria and the other regions display the restrictions, elements and overrides applied if any.

The Applicants region is used to create Shortlist offers and bypass reasons for the applicant in context.

App Ref	Name of Applicant	Bypass	Pos	Category	Start Date	Points	Reg Date	List	Elg
5170	MISS J BROWN		1	R_LOCAL	16-May-2023	111	16-May-2023	REGISTER	Y

The expand icon can be used to display extra applicant detail including the household type.

App Ref	Name of Applicant	Bypass	Pos	Category	Start Date	Points	Reg Date	List	Elg	Actions
114	MR R KENNEDY & MRS L KENNEDY	-	1	-	-	180	25-AUG-1998	HR	Y	Please Select
Household Type CP1 Status LIVE Total Offers 0 Current Offer N Housing Req Notes Y										

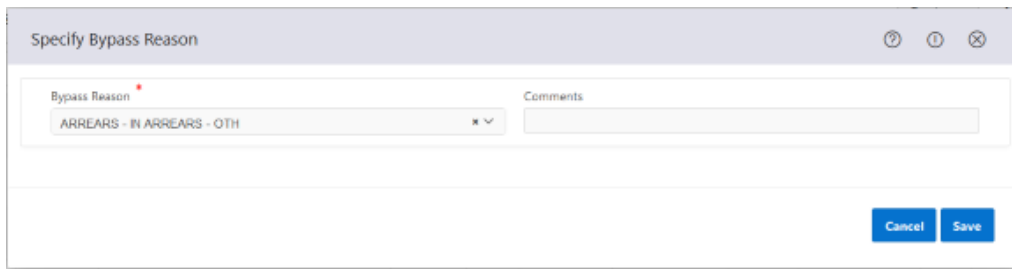
7.2.7 Bypassing Applicants

Bypass reasons can be configured to be optional or mandatory. If mandatory then each applicant with a higher position than the applicant selected for an offer must have a reason entered.

To complete this task, perform the following steps

1. From the returned shortlist of applicants, select **Create Bypass Reason** from the Row **Actions** drop down list for the appropriate row.
2. Choose an appropriate reason and enter any comments as required.
3. Click **save**.

Repeat for the next applicant if required.



The 'Specify Bypass Reason' dialog box contains a 'Bypass Reason' dropdown menu with the selected value 'ARREARS - IN ARREARS - OTH'. To its right is a 'Comments' text input field. At the bottom right of the dialog are 'Cancel' and 'Save' buttons.

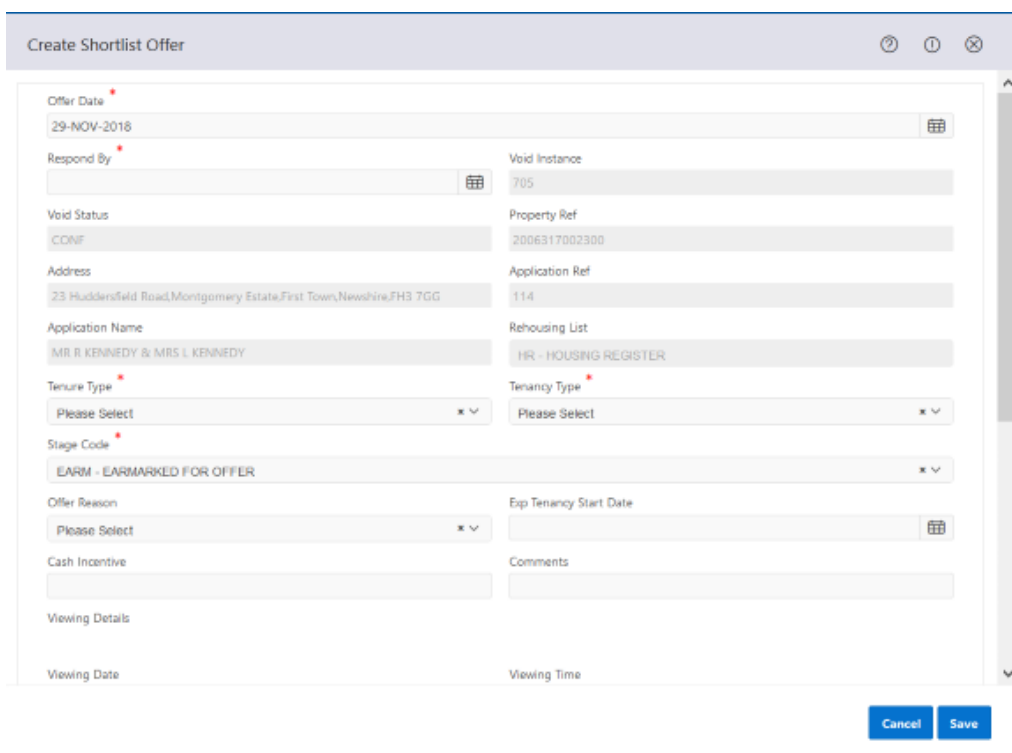
7.2.8 Offer Audit

Bypass reasons form part of the offer audit record. When an offer is made the details of the applicants bypassed with their position and priority at the time are saved to an audit record along with the Shortlist setting including restrictions for future reference.

7.3 Create Shortlist Offer

To complete this task, perform the following steps

1. Enter the **Bypass reasons** for applicants in a higher position if these are required
2. Select **Create Shortlist Offer** from the Row Actions drop down list for the appropriate applicant to display the Create Shortlist Offer subregion.



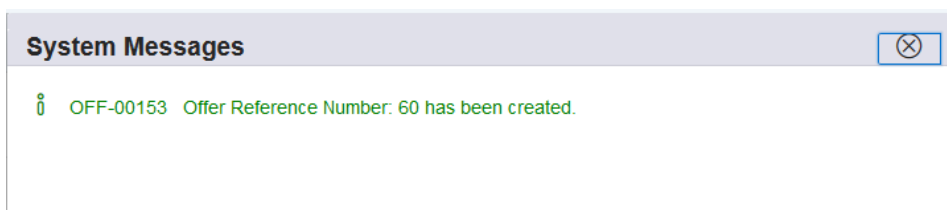
The 'Create Shortlist Offer' form contains the following fields:

- Offer Date: 29-NOV-2018
- Respond By: (empty)
- Void Instance: 705
- Void Status: CONF
- Property Ref: 2006317002300
- Address: 23 Huddersfield Road, Montgomery Estate, First Town, Newshire, FH3 7GG
- Application Ref: 114
- Application Name: MR R KENNEDY & MRS L KENNEDY
- Rehousing List: HR - HOUSING REGISTER
- Tenure Type: Please Select
- Tenancy Type: Please Select
- Stage Code: EARM - EARMARKED FOR OFFER
- Offer Reason: Please Select
- Exp Tenancy Start Date: (empty)
- Cash Incentive: (empty)
- Comments: (empty)
- Viewing Details: (empty)
- Viewing Date: (empty)
- Viewing Time: (empty)

'Cancel' and 'Save' buttons are located at the bottom right of the form.

3. Complete the relevant offer details and click **Save** and **complete shortlist** (Select **Save and close** if you wish the shortlist to remain displayed.)
4. A system message informs you of the offer reference that has been created, click **Close** to acknowledge the message and continue.

Note: If any questions are configured to generate warnings these are displayed and the system message dialogue must be acknowledged by clicking **close**

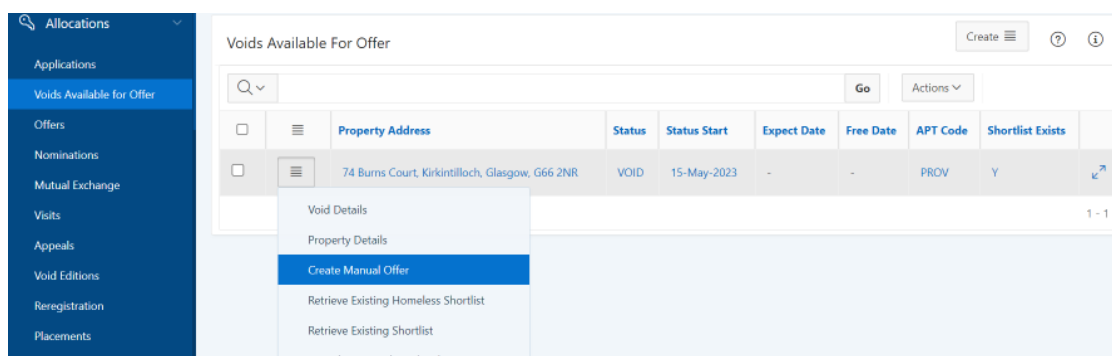


7.4 Create Manual Offer

Manual offers are used to make a direct offer of a property to an applicant without using the Shortlist process. This may be appropriate for certain properties where a shortlist has not been specified or where an emergency allocation is to be made.

To complete this task, perform the following steps:

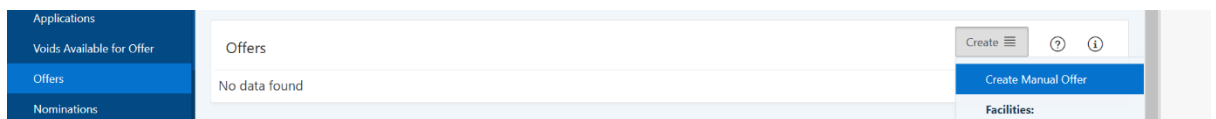
1. Select the **Voids Available for Offer** region within Allocations and search for a void using either the standard or advanced search
2. Having found the property select **Create Manual Offer** from the Row **Actions** drop down list



3. Search for the relevant applicant and complete the offer details as described in the previous section. NOTE – If known the Application

Reference Number can be entered directly into the ‘**Application Ref**’ field and the details will be populated on pressing the tab key on the keyboard.

Tip: it is also possible to create a manual offer from the **Offers** region. Click on **Create** from the **Offers** region and select **Create Manual Offer**. Search for the required Void Instance and the required applicant. Complete the offer record.



8. Maintaining Offers

8.1 Overview

Key Terms

Offer Stage	Offer stages are used to reflect the offer process and allow customers to configure Provisional offers to be followed by Firm Offer Stages
Offer Events	An offer status event can be recorded in the void history, e.g. offer made, offer accepted
Offer Refusal / Rejection / Withdrawal Reasons	Reasons an applicant refuses an offer or an offer is withdrawn e.g. Change of Circumstances, Emergencies
Offer Satisfaction Rating	Applicants satisfaction with the offer, optional field, used for monitoring purposes

Often Provisional offers are made to applicants as the property may be undergoing repairs or still on notice from the outgoing tenant. When the property is ready for occupation a Firm offer is made which, if accepted, is confirmed to create a tenancy. An offer may be refused by the applicant or withdrawn by the organisation and if so reasons are required. In some cases the applicant may accept an offer and change their minds and a facility to reverse the acceptance and then record a refusal is available. Occasionally an applicant will refuse an offer and change their minds. If no further offer has been made the refusal may be reversed and an acceptance entered.

If the property is ready immediately a Firm offer is usually made.

Confirmation of an acceptance is normally done when the applicant has signed their new tenancy agreement. This will create a new tenancy, make the application inactive and if the applicant is an existing tenant flag up that property as on notice (subject to configuration).

Letters or an email or text may be generated to advise the applicant of the offer details.

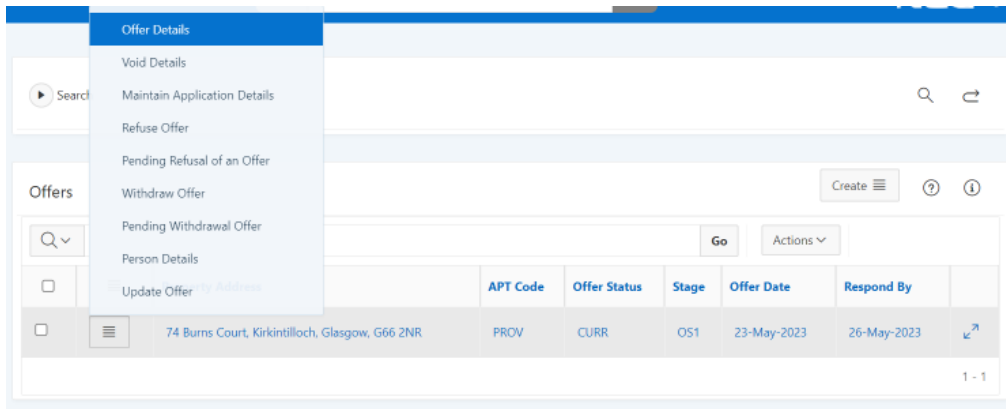
8.2 Update an Offer Stage

The Offers region displays the details of the offers that meet your search criteria and provides you with the ability to maintain them. Depending on the configuration for the stage you may be consequently be able to record the applicants' acceptance or refusal or withdraw the offer.

To complete this task, perform the following steps:

1. Select the **Offers** page within Allocations.

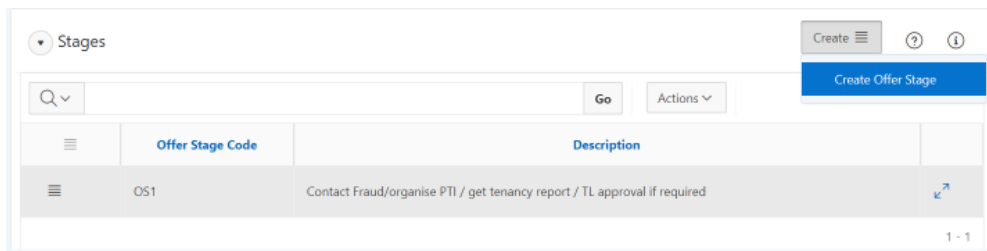
2. Search for the appropriate offer.



3. Select **Offer Details** from the Row **Actions** drop down list for an offer.

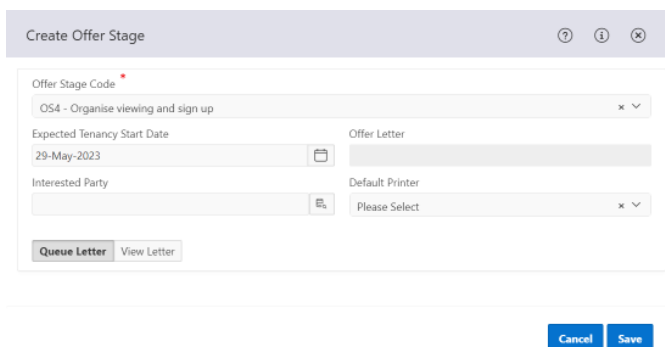


4. Navigate to the Stages sub region **Stages**. This will display a default Stage if configured.



5. Select **Create Offer Stage** from the **Create button**.

The Create Offer Stage sub region appears immediately below the region.



6. Enter the relevant data in the Create Offer Stage sub region.

7. Click **Save**.

The new offer stage appears in the Stages region.

	Offer Stage Code	Description
	OS1	Contact Fraud/organise PTI / get tenancy report / TL approval if required
	OS4	Organise viewing and sign up

8.3 Recording the Outcome of an Offer

To complete this task, perform the following steps:

1. From the **Offers** summary page retrieve the appropriate offer.
1. Select **Offer Details** from the Maintain list in the region banner or alternatively, click the Property Address.

The Offer details page appears.

Each of the following actions is dependent on the retrieval of an appropriate offer and the configuration for the offer stage.

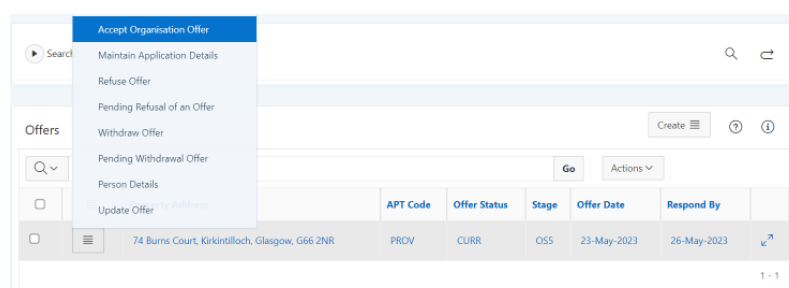
8.4 Accepting an Offer

NOTE – This action may only be available once an **Expected Tenancy Start Date** has been entered.

To complete this task, perform the following steps:

1. Select **Accept Organisation Offer** from the Row **Actions** drop down list.

The Accept Offer subregion opens.



2. Enter or amend the relevant data in the **Accept Offer** subregion.

Accept Offer
? ⓘ ✕

Offer Ref
1

Property Address
74 Burns Court, Kirkintilloch, Glasgow, G66 2NR

Effective Date
23-May-2023

Expected Tenancy Start Date
29-May-2023

Satisfaction Rating
Please Select

Do you want to withdraw alternate offers for applicant

Number of Alternate Offers
0

Comments

Cancel
Save

3. Click Save.

Offers
Create ⓘ ⓘ

Go
Actions

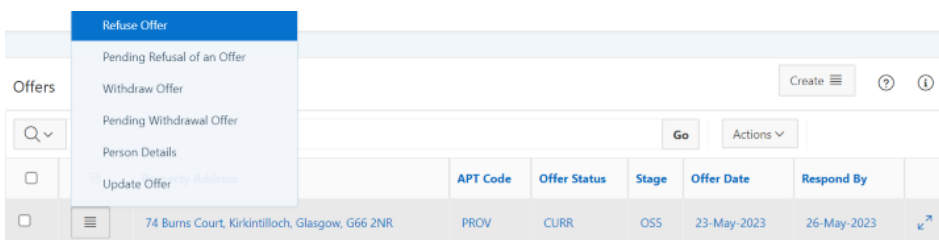
		Property Address	APT Code	Offer Status	Stage	Offer Date	Respond By
<input type="checkbox"/>	☰	74 Burns Court, Kirkintilloch, Glasgow, G66 2NR	PROV	ACCP	OS5	23-May-2023	26-May-2023

The subregion closes and you are returned to the Offers Details Page.
 The Status will now show as 'ACCP'.

8.5 Refusing an Offer

To complete this task, perform the following steps:

1. Retrieve the offer and select **Refuse Offer** from the Actions list in for the property.



The Refuse Offer wizard appears. This is comprised of two wizard sub pages, one for updating the offer details and one to record the refusal reason(s).

2. Enter or update the relevant data in **Offer Details**.

3. Click **Next** to access the **Refusal Reason** sub page.

4. Enter the relevant data in the subpage. If required, use the Add Row button to record more than one reason.

5. Click **Save**.

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

Note: Dependant of customer configuration the reasonable refusal indicator can be set to default to N(o). Authorised Users can amend the indicator.

8.6 Withdraw an Offer

To complete this task, perform the following steps:

1. Select **Withdraw Offer** from the Actions list in the appropriate row.

	APT Code	Offer Status	Stage	Offer Date	Respond By		
<input type="checkbox"/>	74 Burns Court, Kirkintilloch, Glasgow, G66 2NR	PROV	CURR	OS5	23-May-2023	26-May-2023	

The Withdraw Offer wizard appears. This is comprised of two wizard sub pages, one for updating the offer details and one to record the withdrawal reason(s)

2. Enter or update the relevant data in **Offer Details**.

3. Click **Next** to access the **Withdrawal Reason** sub page.

Reason Code	Withdraw Reason Comments
CAN_APP - cancel appl...	Cancel application as of 23/05/2023

4. Enter the relevant data in the subpage. If required, use the Add Row button to record more than one reason.

5. Click **Save**.

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

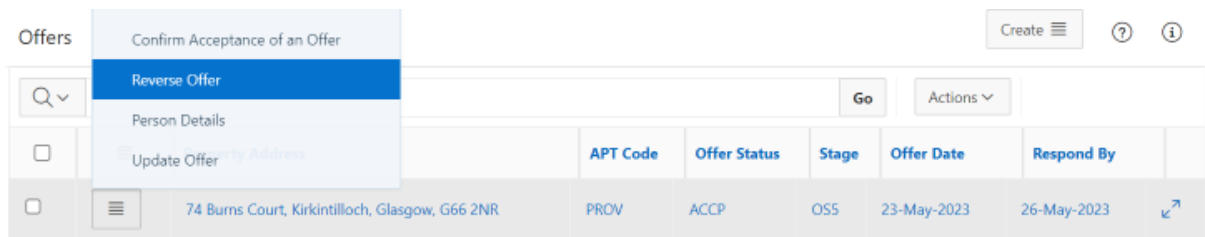
Note: An offer may also be subject to a pending withdrawal where a user can not fully withdraw the offer and it must be confirmed by another officer.

8.7 Reverse an Offer

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 complete this task, perform the following steps:

1. Select **Reverse Offer** from the Actions list in the appropriate row.



The Reverse Offer Decision subregion appears immediately below the record selected with the record in context.

The form contains the following fields:

- Offer Ref: 1
- Property Address: 74 Burns Court, Kirkintilloch, Glasgow, G66 2NR
- Effective Date: 23-May-2023
- Satisfaction Rating: Please Select
- Comments: (empty)
- List Status: ACTV - active
- Status Reason: Please Select
- Status Start: (empty)
- Status Review: (empty)

Buttons: Cancel, Save

2. Enter the relevant data in the Reverse Offer Decision subregion.
3. Click **Save**.

The subregion closes and you are returned to the Offers region.

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

REMEMBER – you must now record the result of the Offer.

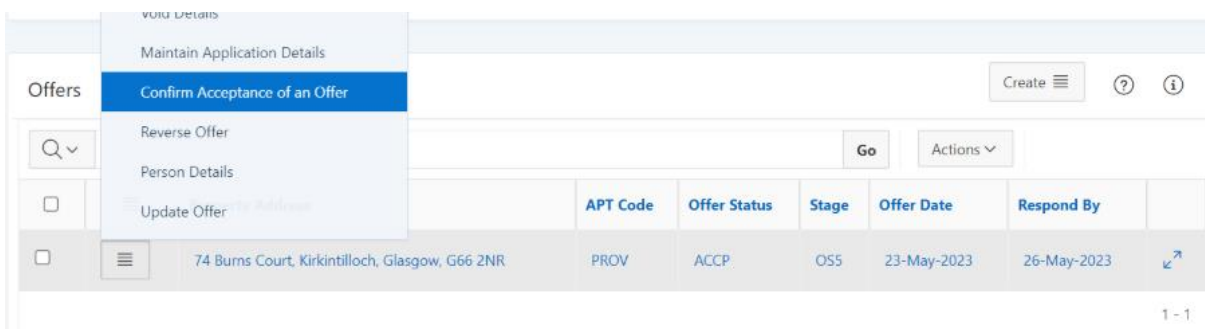
Tip: You can enter or update fields depending on their content and status.

8.8 Confirm Acceptance of an Offer

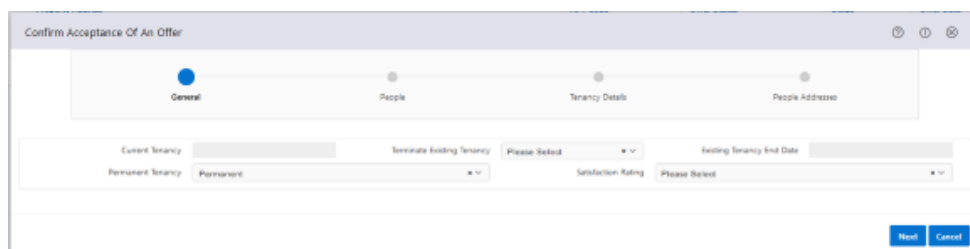
This process confirms the acceptance of an offer and creates a new tenancy. It may also invoke a follow on action to create a rent account subject to configuration of user security.

To complete this task, perform the following steps:

1. Select **Confirm Acceptance of an Offer** from the **Actions** list in the appropriate row.



The Confirm Acceptance of an Offer wizard appears.

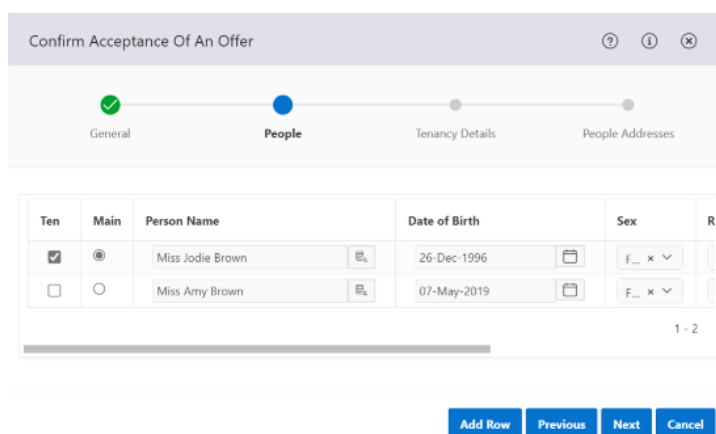


This wizard is comprised of several subpages:

- General Subpage;
- People Subpage;
- Tenancy Details Subpage;
- People Addresses Subpage.

2. Enter or amend any data on the **General subpage**.

3. Click **Next** to access the **People Subpage**.



4. Use this subpage to enter or amend people and tenant details.

Note: It is likely that date of birth, relationship and gender has previously been entered as part of the application process.

There may be other fields to complete as part of this process.

5. Use **Update** (at the right hand side of the wizard) to call the **Update Person** subpage and enter further details as required. This may include ethnic origin, faith and sexuality.

6. Use **Add Row** to associate another person with the tenancy who was not part of the original application.

7. Click **Next** to access the Tenancy Details Subpage.

Confirm Acceptance Of An Offer

General People **Tenancy Details** People Addresses

Tenure Type *	SST - Scottish Secure Tenancy x v	Tenancy Type *	SST - Scottish Secure Tenancy x v
Start Date *	29-May-2023	Review Date	
Tenancy Source *	R_LOCAL - General Needs - ... x v	Tenancy Status	Please Select x v
Corresp Name *	MISS J BROWN	Contact Number	
Alternative Ref		Tenancy Services	Please Select x v
Proxy Type	Please Select x v	Proxy Name	
Supervisor		Survey Code	Please Select x v
Assigned Tenure			

Previous Next Cancel

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

Note: Further information may be displayed if Tenure Band functionality has been configured.

9. Click **Next** to call the People Addresses subpage.

Note: Use this subpage to enter or confirm contact address details. Provided the tenancy is being created for a residential property its address can be copied to all people on the application using the Copy to All button. If required one or more people can be excluded and if required an alternative address assigned using the Go to Address Search icon.

Confirm Acceptance Of An Offer

General People Tenancy Details **People Addresses**

Contact Address 74 Burns Court, Kirkintilloch, Glasgow, G66 2NR **Copy To All**

Name	Contact Address	Address Start	Exclude
Miss Jodie Brown	74 Burns Court, Kirkintilloch, Glasgow, G66 2NR	29-MAY-2023	N x v
Miss Amy Brown	74 Burns Court, Kirkintilloch, Glasgow, G66 2NR	29-MAY-2023	N x v

1 - 2

Previous Cancel Save

10. Click **Save**.

The wizard closes and Warnings that a tenancy has been created and contact addresses amended are 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 this Account Creation page. (See Rents Training manual.).

9. Make and Monitor Nominations

A nomination is a request made by a third party, such as a Housing Association, to provide a list of potential nominees who match to a property for which a nomination is sought. The external organisations will be configured as Interested Parties and the property for which applicants are to be nominated can either be created as addresses or properties on the database. The selection of an Allocations Property Type Code enables Shortlisting to take place and the process is similar to Shortlisting for a property belonging to your own organisation.

9.1 Creating a Nomination Request

To complete this task, perform the following steps:

1. Click **Housing**.
2. Click **Allocations**.
The default summary page appears.
3. Click **Nominations**.
The Nominations summary page appears.
4. Select the **Create Nomination** from the **Create list** in the region banner.
The Create Nomination subregion appears immediately below the region.

The screenshot shows a web form titled "Create Nomination". The form is organized into two columns of fields. The left column includes: "Agency Name" (text input), "Property Ref" (text input), "Address Ref" (text input), "Road Ref" (text input), "Tenure Type" (dropdown menu with "Please Select"), "Received Date" (date picker), "APT Code" (dropdown menu with "Please Select"), and "Comments" (text area). The right column includes: "Tenancy Type" (dropdown menu with "Please Select"), "Target Date" (date picker), and "Agency Ref" (text input). At the bottom right of the form, there are two buttons: "Cancel" and "Save".

5. Search and retrieve the relevant Agency (Interested Party).

Interested Party Search

Advanced Search Quick Search Last Query

Interested Party Details Search Criteria

Reference: Shortname:

Interested Party Type: HOU_ASSOC Housing Association

Interested Party Role: Please Select

Username: Please Select

Organisation: Person Ref:

Printer:

Comments:

Current Party: Yes No All

Type Other Fields

Search New Query Count Cancel

Interested Party Search

Advanced Search Quick Search Last Query

	Reference	Shortname	Interested Party Type	Username	Description
Select	32	LORETTO	HOU_ASSOC		LORETTO HOUSING ASSOCIATION
Select	31	CV	HOU_ASSOC		CLYDE VALLEY HOUSING ASSOCIATION
Select	25	MBLACKWOOD	HOU_ASSOC		MARGARET BLACKWOOD HOUSING ASSOCIATION
Select	33	TRUST	HOU_ASSOC		TRUST HOUSING ASSOCIATION
Select	24	SANCTUARY	HOU_ASSOC		SANCTUARY HOUSING ASSOCIATION
Select	34	CASTLE_ROC	HOU_ASSOC		CASTLE ROCK EDINVAR HOUSING ASSOCIATION
Select	26	BIELD	HOU_ASSOC		BIELD HOUSING ASSOCIATION
Select	29	HANOVER	HOU_ASSOC		HANOVER HOUSING ASSOCIATION
Select	30	KEY	HOU_ASSOC		KEY HOUSING ASSOCIATION
Select	20	HILLHEAD	HOU_ASSOC		HILLHEAD HOUSING ASSOCIATION
Select	27	CAIRN	HOU_ASSOC		CAIRN HOUSING ASSOCIATION
Select	28	CROWN	HOU_ASSOC		CROWN HOUSING ASSOCIATION
Select	22	CUBE	HOU_ASSOC		CUBE HOUSING ASSOCIATION

6. Select one of the options of Property Ref, Address Ref or Void Ref depending on how the property record is to be or has been created on the system.

Property Details

Property Reference:

Admin Unit:

Direct Link Only:

Property Type: Please Select

Property Sub Type: Please Select

Property Status: Please Select

Ownership: Please Select

Source: Please Select

Alternative Ref:

Residential: No Yes

Owned: No Yes

Status Type: Occup/Wait only Closed only All

IP Shortname:

Current Interested Parties Only:

7. Enter the remaining relevant data in the Create Nomination subregion.

Create Nomination

Agency Name: HILLHEAD HOUSING ASSOCIATION

Property Ref: 1 Thrums Avenue, Bishopbriggs, Glasgow, G64 1ER

Address Ref:

Void Ref:

Tenure Type: Please Select Tenancy Type: Please Select

Received Date: Target Date:

APT Code: Please Select Agency Ref:

Comments:

Cancel Save

8. Click .

The new nomination appears in the Nominations region.

<input type="checkbox"/>	Property Address	Agency	APT Code	Status	Received Date	Target Date	Shortlist Exists
<input type="checkbox"/>	1 Thrums Avenue, Bishopbriggs, Glasgow, G64 1ER	HILLHEAD	2ETH4CG	RECD	26-May-2023	31-May-2023	N

9.2 Selecting Suitable Applicants for Nominations

To complete this task, perform the following steps:

1. Click **Housing**.
2. Click **Allocations**.
The default summary page appears.
3. Click **Nominations**.
The Nominations summary page appears.
4. Enter your search criteria in the **Search** subregion.
If the default search options do not meet your needs, click Advanced Search and enter more specific search criteria.
5. Click **Search**.
The records that meet your search criteria appear in the Nominations region.

<input type="checkbox"/>	Property Address	Agency	APT Code	Status	Received Date	Target Date	Shortlist Exists
<input type="checkbox"/>	1 Thrums Avenue, Bishopbriggs, Glasgow, G64 1ER	HILLHEAD	2ETH4CG	RECD	26-May-2023	31-May-2023	N

6. Click on **Select Suitable Applicants** from the **Actions** list in the appropriate row.
The Select Suitable Applicants wizard appears.

Select Suitable Applicants ? i X

Advanced Search Quick Search Last Query

▼ Short List

Short List *
 Eligible Applicants Only
 Exclude Bypassed Applicants
 Exclude Refused Applicants
 Nomination Requested
 Interested Applicants Only

Please Select x ▼
 SLG - General
 SLM - Medical
 COMB - Combined
 SLHL - Homeless
 SLN - Nominations
SLHT - Homeless Temp

▶ Restrictions

Search
New Query
Count
Cancel

7. Select the relevant Shortlist from the drop down list.
 The Select Suitable Applicants Search appears. This contains sub regions for Shortlist, Restrictions, Elements and Override.
8. Enter the criteria in the Select Suitable Applicants Search and click **Search**.
 Any applicants who match the criteria selected will be returned

App Ref	Name of Applicant	Bypass	Fix	Category	Start Date	Points	Req Date	List	Elig
118	MRS P FURACE & MR J FURACE	-	2	-	-	165	06-JUL-1999	HR	Y
117	MR W LAWRENCE & MRS C LAWRENCE	-	3	-	-	120	16-JUL-1999	HR	Y
118	MISS W LAURIE & MR A GRANT	-	4	-	-	110	21-OCT-2001	HR	Y
45	MISS D HOODIN	-	5	-	-	110	21-NOV-2001	HR	Y
80	MR C IZZARD	-	-	-	-	80	17-JAN-2002	HR	Y
62	K WILLIAMS	-	6	-	-	70	21-JAN-2002	HR	Y

See Chapter 4 for full details on Selecting Suitable Applicants for offers.

9.3 Recording the Acceptance of a Nomination

To complete this task, perform the following steps:

1. From the Shortlist above select the applicant record and from the **Actions** column select **'Create Shortlist Nominee Offer'**.

Applicants

App Ref	Name of Applicant	Byres	Pos	Category	Start Date	Points	Reg Date	List	Elg
110	MRS P RUNCIE & MR J RUNCIE	-	2	-	-	105	05-JUL-1999	HR	Y
	MRS N LAWRENCE & MRS C LAWRENCE	-	3	-	-	120	18-JUL-1999	HR	Y
	MISS M LAURIE & MR A GRANT	-	4	-	-	110	31-OCT-2001	HR	Y

The **'Create Shortlist Nominee Offer'** subregion opens up in the same page immediately below the record.

Create Shortlist Nominee Offer

Address
 1 Windsor Place, Herengate Street, Wellington, City of Edinburgh, Edinburgh, EH3 2BB

Offer Date
 30-NOV-2018

Application Ref
 110

Application Name
 MRS P RUNCIE & MR J RUNCIE

Rat Housing List
 HR

Rat Housing List Description
 HOUSING REGISTER

Exp Tenancy Start Date

Comments

Cancel Save

2. Enter the relevant data such as the **'Exp Tenancy Start Date'** if known.
3. Click **Save**.

The subregion closes and an information message is displayed notifying the user that Offer/Nomination record has been created.

System Messages

OFF-00153 Offer Reference Number: 02 has been created.

4. Return to the Nominations Summary page.

Nominations

Property Address	Agency	APP Code	Status	Received Date	Target Date	Shortlist Expiry
1 Windsor Place, Herengate Street, Wellington, City of Edinburgh, Edinburgh, EH3 2BB	HDMC	289VDMT	NOMINATE	30-NOV-2018	14-DEC-2018	Y

Nomination Ref: 02
 Agency Ref: [blank]
 Tenancy Type: Periodic Tenancy
 Status Effective Date: 30-NOV-2018
 Status System Date: 30-NOV-2018
 Offer Created By: JDCU
 Offer Created Date: 30-NOV-2018 15:38:17
 Tenure Type: Secure Tenure
 Status System Date: 30-NOV-2018

NOTE – The status of the Nomination will have changed from 'RECEIVED' to 'NOMINATE'.

From the **Action** column select **'Nominee Details'**.

This opens up details page, which displays the address and associated Nominees.

Nominee Details

Property Address: 1 Windsor Park, Harrogate Street, Wellington Estate, First Town, Newcraigh, FK2 2BB
 Agency Short Name: HOME
 APN Code: 2891001
 Received Date: 30-NOV-2018
 Target Date: 14-DEC-2018
 Status: NOMINATE

Expand

Nominees

Nominees

Name	List	List Status	Offer Date	Status	Status Date
MRS P RUNCIE & MR J RUNCIE	HT	LIVE	30-NOV-2018	OFFER	30-NOV-2018

Select the **'Accept Nominee Offer'** from the Actions column in the Nominees region.

This opens the **'Accept Nominee Offer'** wizard.

Accept Nominee Offer

Accept Nominee

Property Address: 1 Windsor Park, Harrogate Street, Wellington Estate, First Town, Newcraigh, FK2 2BB
 Offer Ref: 62
 Comments:
 Effective Date: 30-NOV-2018
 Exp Tenancy Start Date: 10-DEC-2018
 List Status: HSED - housed
 Status Date:
 Status Reason: Please Select
 Complete Nomination:

Next Cancel

Check the **'Complete Nomination'** if the nomination is to be set to a completed status and then click the **Next** button.

Use the **'Copy to All'** button to update all the associated persons' address profiles.

Accept Nominee Offer

Accept Nominee

Copy Contact Address

Contact Address: 1 Windsor Park, Harrogate Street, Wellington Estate, First Town, Newcraigh, FK2 2BB

Name	Contact Address	Address Start	Excl
Mrs Patricia Runcie	8 Church Street, Prestwich, Manchester M25 7YG	22-JAN-2002	<input type="checkbox"/>
Mrs Kelly Runcie	8 Church Street, Prestwich, Manchester M25 7YG	22-JAN-2002	<input type="checkbox"/>
Mr John Runcie	8 Church Street, Prestwich, Manchester M25 7YG	22-JAN-2002	<input type="checkbox"/>

Previous Cancel Save

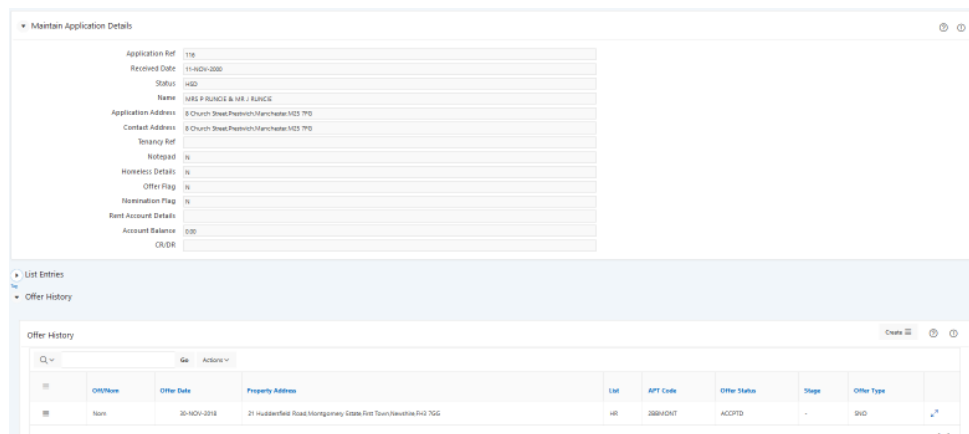
Click on the **Save** button to commit the changes.

The nomination is set to a status of **'COMPLETE'** and the application is cancelled with a status of **'HSED'**.

Nominees

Name	List	List Status	Offer Date	Status	Status Date
MRS P RUNCIE & MR J RUNCIE	HT	HSED	30-NOV-2018	ACCEPTD	30-NOV-2018

The history of offers and nominations can be seen from within the Offer History region for an application.



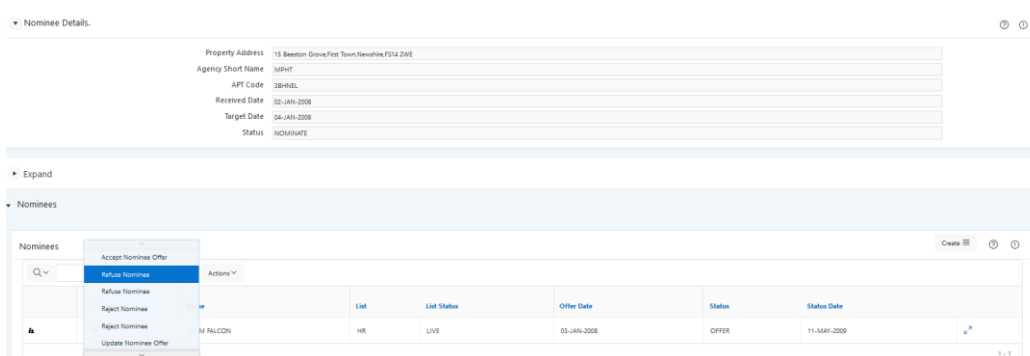
9.4 Refuse a Nomination

A nomination may be refused by the applicant to whom it has been offered in the same way as an applicant is made an offer by your organisation. If there are no further nominations to be made for the property the nomination can be completed and the nomination request closed.

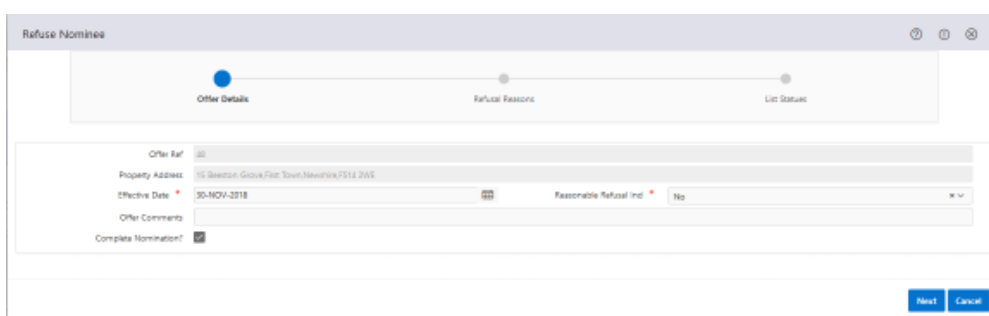
To complete this task, perform the following steps:

Note: Only nominations with a status of current or OFFER can be refused.


1. Click **Housing**.
2. Click **Allocations**.
The default summary page appears.
3. Click **Nominations**.
The Nominations summary page appears.
4. Enter your search criteria in the **Search** subregion.
If the default search options do not meet your needs, click Advanced Search and enter more specific search criteria. For further information, see either the Search or Nomination Search topics.
5. Click **Search**.
The records that meet your search criteria appear in the Nominations region.
6. **Select Nominee Details** from the **Actions** list in the appropriate row.
The Nominations details page appears.



7. Click **Nominees**.
The system scrolls down to the Nominees region.
8. Select **Refuse Nominee** from the Row Actions list in the appropriate row.
The Refuse Offer wizard appears.
9. Enter the relevant data in the Refuse Offer wizard.



For further information see the page describing the Refuse Offer wizard.

10. Click .
The wizard closes and you are returned to the Nominees region.
The changes you made to the offer have been applied.


9.5 Reject a Nomination

An applicant for a nomination may be rejected by the organisation that it was nominated to. For example either because another nomination was preferred or the applicant did not meet the required criteria for the nomination.

To complete this task, perform the following steps:

1. Click **Housing**.
2. Click **Allocations**.
The default summary page appears.
3. Click **Nominations**.
The Nominations summary page appears.
4. Enter your search criteria in the **Search** subregion.
If the default search options do not meet your needs, click Advanced Search and enter more specific search criteria. For further information, see either the Search or Nomination Search topics.

5. Click **Search**.
The records that meet your search criteria appear in the Nominations region.
6. **Select Nominee Details** from the Row Actions list in the appropriate row.
The Nominations details page appears.
7. Click Nominees.
The system scrolls down to the Nominees region.
8. Select **Reject Nomination** from the Row Action list in the region banner.
The Reject Nominee wizard is activated.

9. Click on the 'Next' button to enter the Rejection Reason(s). NOTE – This is the reason why the Nominee has been rejected by the Housing Association or Registered Social Landlord.
10. Click .
The rejection record has been created.

9.6 Reverse a Nomination

There may be occasions when a nomination needs to be reversed, for example if it has been rejected but can then be nominated again.

To complete this task, perform the following steps:

1. Click **Housing**.
2. Click **Allocations**.
The default summary page appears.
3. Click **Nominations**.
The Nominations summary page appears.
4. Enter your search criteria in the **Search** subregion.
If the default search options do not meet your needs, click Advanced Search and enter more specific search criteria. For further information, see either the Search or nominations advanced search topics.
5. Click **Search**.
The records that meet your search criteria appear in the Nominations region.
6. Check the select box for the record.
Alternatively, click the Property Address and go to step 8.

7. Select **Nominee Details** from the Row Actions list in the appropriate row.
The Nominations details page appears.
8. Click **Nominees**.
The system scrolls down to the Nominees region.
9. Select **Reverse Nominee Offer** from the Row Actions list in the appropriate row.
The Reverse Nominee Offer subregion appears immediately below the record selected.

10. Enter the relevant data in the Reverse Nominee Offer subregion.
For further information see the page describing the Reverse Nominee Offer subregion.

11. Click .

The nominee offer has been reversed.

9.7 Withdraw a Nomination

There may be occasions when a nomination cannot be made or a nomination request that has been made by an organisation will need to be withdrawn as it is not longer available.

1. Select **Result A Nomination** from the Row Actions list in the appropriate row.
The Result A Nomination subregion appears immediately below the region.

2. Enter the relevant data in the **Result A Nomination** subregion, by selecting a new Nomination **status** of either – Complete, Received, Withdrawn or Nominated.
For further information see the page describing the Result A Nomination subregion.

3. Click .

The subregion closes and you are returned to the Nominations region.

The changes you made to the nomination have been applied.

9.8 Update a Nomination

You can enter or update fields depending on their content and status. For example if a nomination has been received but no nominee put forward you can update the Allocations property type code but not once a nomination has been made.

To complete this task, perform the following steps:

1. Click **Housing**.

2. Click **Allocations**.

The default summary page appears.

3. Click **Nominations**.

The Nominations summary page appears.

4. Enter your search criteria in the **Search** subregion.

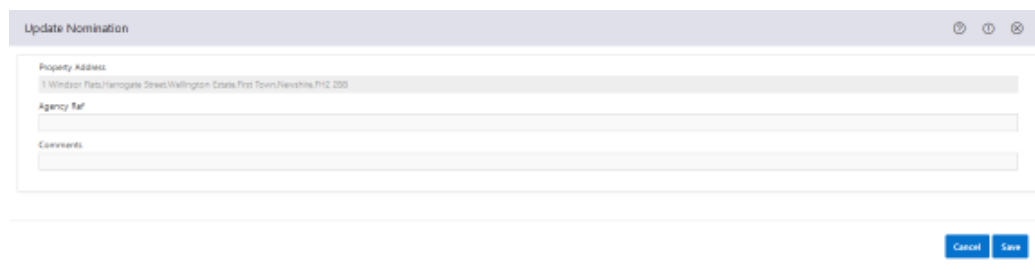
If the default search options do not meet your needs, click Advanced Search and enter more specific search criteria. For further information, see either the Search or Nomination Search topics.

5. Click **Search**.

The records that meet your search criteria appear in the Nominations region.

6. Select **Update Nomination** from the Row Actions list in the appropriate row.

The Update Nomination subregion appears immediately below the record selected with that record in context.



7. **Enter the relevant data** in the Update Nomination subregion.

For further information see the page describing the Update Nomination subregion.

8. Click .

The subregion closes and you are returned to the Nominations region.

The changes you made to the nomination have been applied

10. Re- Registration

Reregistration is used to provide details of the applicants who, after a specified 1 year, will need to reregister their interest in remaining on a rehousing list. To facilitate this, a reregistration letter should be sent out to the appropriate applicants. If no reply within 2 weeks of first letter a second will be generated

The Reregistration summary page enables you to maintain this information and displays details such as the application reference, the date it was sent etc.

10.1 Searching For Registration Details

To complete this task, perform the following steps:

1. Click **Housing**.

The Housing menu expands.

2. Click Allocations.

The Allocations menu expands.



3. Click **Reregistration**.







The Reregistration page appears.

4. Enter your search criteria in the **Search** area.

If the Quick Search options do not meet your needs, click the Advanced Search icon at the top of the Search area, and enter more specific criteria.

5. Click **Search**.

Reregistration Create  ? 

<input type="checkbox"/>		Application Ref	Rehousing List	List Status	Send Date	Reply By Date
<input type="checkbox"/>		122665	REGISTER	ACTV	03-May-2024	07-Jun-2024
<input type="checkbox"/>		9	GGS	ACTV	17-May-2024	07-Jun-2024
<input type="checkbox"/>		9	GGS	ACTV	17-May-2024	07-Jun-2024
<input type="checkbox"/>		15	REGISTER	ACTV	17-May-2024	07-Jun-2024
<input type="checkbox"/>		15	REGISTER	ACTV	17-May-2024	07-Jun-2024

The records that meet your search criteria appear in the Reregistration region.

10.2 Re-registering Applications

To complete this task, perform the following steps:

1. Click Housing.

The Housing menu expands.

2. Click **Allocations** .

The Allocations menu expands.

3. Click **Reregistration**.

The Reregistration page appears.

4. Enter your search criteria in the **Search** area.

If the Quick Search options do not meet your needs, click the Advanced Search icon at the top of the Search area, and enter more specific criteria.

The records that meet your search criteria appear in the Reregistration region.

5. Select **Reregister** Applications from the Row Action list corresponding to the record you want to reregister.

The screenshot shows a web interface for 'Reregistration'. At the top, there is a search bar and a 'Create' button. Below is a table with columns: Application Ref, Rehousing List, List Status, Send Date, and Reply By Date. A context menu is open over the second row, with 'Reregister Application' highlighted.

	Application Ref	Rehousing List	List Status	Send Date	Reply By Date
<input type="checkbox"/>	122665	REGISTER	ACTV	03-May-2024	07-Jun-2024
<input type="checkbox"/>		GGS	ACTV	17-May-2024	07-Jun-2024
<input type="checkbox"/>		GGS	ACTV	17-May-2024	07-Jun-2024
<input type="checkbox"/>	15	REGISTER	ACTV	17-May-2024	07-Jun-2024

The Reregister Applications form appears.

6. Enter the relevant data in the form.

Reregister Application

Reply Date *
21-May-2024

Reregister
No

Cancel Save




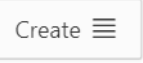











7. Click **Save.**













The form closes and you are returned to the Reregistration region.








The application has been reregistered.

N.B if there is no response to letter from applicant in the timescales then application will automatically be closed.




11. System Icons

Icon	Description
	Click the Main Row Action icon to view a list of different areas within the system. (THE BURGER)
	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.
	Click the Create icon to open the form or wizard used to create a record.
	Click the Open icon to view the contents of a region or form.
	Click the Close icon to hide the contents of a region or form.
	Click the Next Page icon to view the next set of records in a summary page region.
	Click the Previous Page icon to view the previous set of records in a summary page region.
	Click the Expand/Collapse icon to display additional information relating to the corresponding record or to hide this additional information.
	Click the Start of Page icon to allow the system to automatically scroll up to the start of the summary or details page you are currently on.
	Click the Select this record icon to select the record in the corresponding row to display associated child regions.
	Click the Advanced Search icon to access an advanced search from a summary page.
	Click the Last Query icon to resubmit the last query performed.
	Click the Help icon to open the online help topic relating to the page, region or form you are using. The help button appears in the top banner or footer.
	Click the Help About icon to view further information about the region or form you are currently in.

	<p>Click the Cancel icon to close the region, form or screen you are in without saving your changes.</p>
	<p>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.</p>
	<p>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.</p>
	<p>Click the Cards View icon to change the way in which the search results are displayed. This icon is only available in the MyPortal 360View page.</p>
	<p>Click the Report View icon to change the way in which the search results are displayed. This icon is only available in the MyPortal 360View page.</p>
	<p>Click the More icon at the top of a details page to display more links that you can use to navigate to different regions.</p>
	<p>Click the Calendar icon to select the date you want from the pop-up calendar that appears. Alternatively enter the date using your keyboard.</p>
	<p>Click the Open Search Page icon to open a secondary form where you can enter your search criteria.</p>
	<p>Click the Select List icon to select the item you want from the pop-up list that appears.</p>
	<p>Click the System Menu icon to a view drop down list from which you can perform the following actions:</p> <ul style="list-style-type: none"> 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.
	<p>Click the Excel icon to export the records held within the region to your computer as an Excel document.</p>
	<p>Click the Add Row icon to add a new row to a form in a wizard.</p>

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

There are five types of errors:

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