Rents User Guide

Contents

1. NEC Rents

1.1 Introduction

This guide provides an overview of NEC Rents and the related processes.

1.2 Objectives

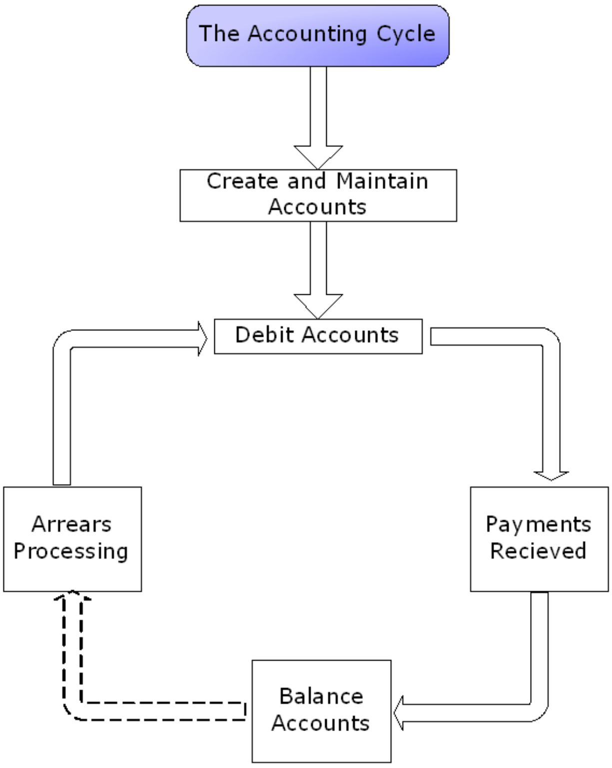
This guide will help you to:

- Understand the main functions of NEC Rents.
- Understand the principles of the Accounting Cycle.
- Understand the Principles of the Financial Admin Years.

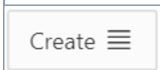
1.3 Main Functions of Rents

- Rent Calculation.
- Account Maintenance (including new, existing and former tenants).
- Payments and Adjustments.
- Suspense Accounts.
- Sundry Accounts.
- Rent Collection.
- Arrears Control.
- Recording Tenant Service Charges if required.
- Year Start/Year End Management.

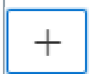
1.4 Accounting Lifecycle



1.5 System Icons:

Icon	Description
	Click the **Main Row Action** icon to view a list of different areas within the system. (The Burger Bar)
	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.
	Click the **Cancel** icon to close the region, form or screen you are in without saving your changes.
	Click the **Mobile** icon to indicate that you are using a mobile device. The screen will adapt so that it is fully optimised when in this mode.
	Click the **Desktop** icon to indicate that you are using a desktop. The screen will adapt so that it is fully optimised when in this mode.
	Click the **Cards View** icon to change the way in which the search results are displayed. This icon is only available in the **MyPortal 360View** page.

	Click the **Report View** icon to change the way in which the search results are displayed. This icon is only available in the **MyPortal 360View** page.
	Click the **More** icon at the top of a details page to display more links that you can use to navigate to different regions.
	Click the **Calendar** icon to select the date you want from the pop-up calendar that appears. Alternatively enter the date using your keyboard.
	Click the **Open Search Page** icon to open a secondary form where you can enter your search criteria.
	Click the **Select List** icon to select the item you want from the pop-up list that appears.
	Click the **System Menu** icon to a view drop down list from which you can perform the following actions: **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.
	Click the **Excel** icon to export the records held within the region to your computer as an Excel document.
	Click the **Add Row** icon to add a new row to a form in a wizard.
	Click the **Remove this row** icon to remove a row from a form in a wizard.
*	This icon denotes a mandatory field where information must be entered before a task can be completed.
	Click the **Reset** icon to reset your selections back to the default settings.

	Click the **Move** icon to move your selection to another area.
	Click the **Move All** icon to move all your selections to another area.
	Click the **Remove** icon to remove your selection.
	Click the **Remove All** icon to remove all your selections.
	Click the **Top** icon to move your selection to the top of the list.

There are five types of errors:

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

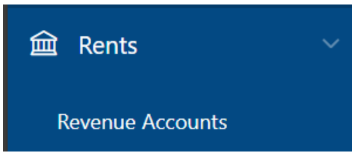
1.6 Glossary

Saffron	NEC
Financial Group	**Financial Group**
HRA / LUP	Weekly48
HRH	Weekly52HRH
LTP	Weekly52LTP
SUP	RAP
DEC	DEC48 / DEC52
LUS	ANNGGS
System	**System**
Rent Account Number	Payment Reference
Agreements	Arrangements
Tenancy Accounts	Rent Accounts
Patches	Admin Units
People	Parties
Delete	Decline
Statement	Transactions

2. Navigation

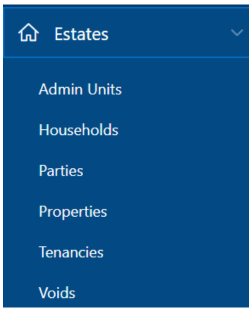
2.1 Navigating Rents

- From any page on the module’s navigation on the left-hand side find and select **‘Rents’**
- From here you select **‘Revenue Accounts’**



2.2 Navigating Tenancies, Properties, Voids and People

- From any page on the module’s navigation on the left-hand side find and select **‘Estates’**
- From here you can select any of the following modules you need to get into.

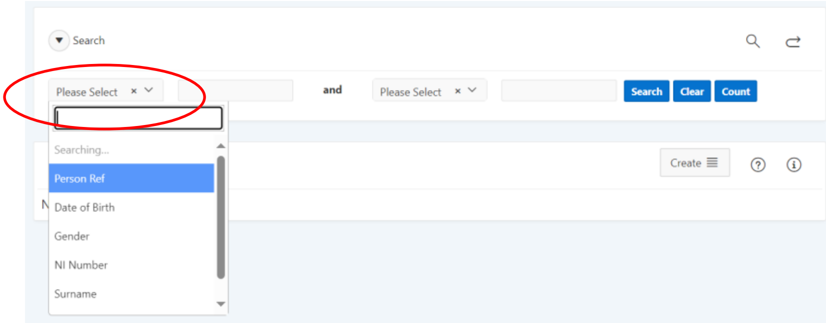


2.3 Navigating Pre Tenancy Rents and Housing Support Referrals

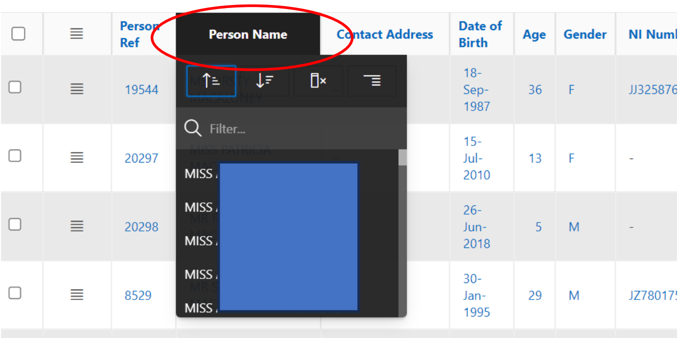
- From any page on the module’s navigation on the left-hand side find and select **‘Support Services’**
- Select **‘Referrals’**

2.4 Search Bar

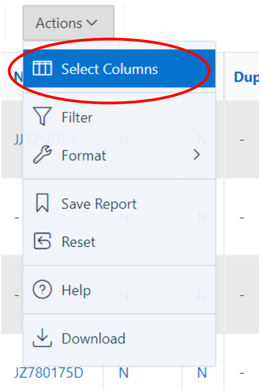
- From any module area you will find the search bar on the top. Here use the drop down to select a search option to use, e.g. **‘Surname’**, **‘Admin Unit’**, **‘Reference’**



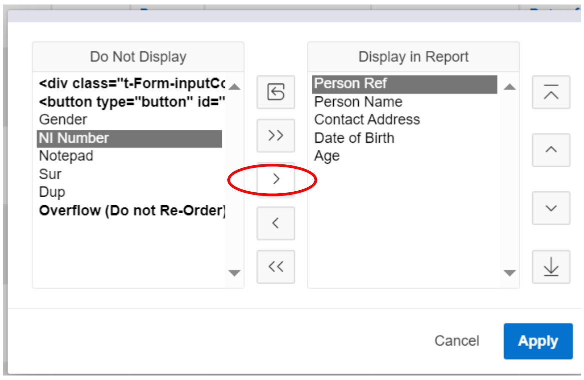
- Enter the details of your search item into the box next to the drop down.
- Click ‘**Search**’
- If there are multiple search results you can use the ‘**Column Headers**’ to refine the search further by clicking on the desired header and using the sort of filter functions



- If there are no suitable headers for you to filter your results by you can click ‘**Actions**’ and select ‘**Select Columns**’



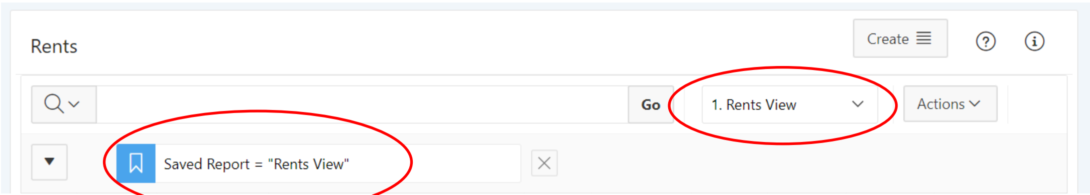
- From here you can choose a more suitable header on the ‘**Do Not Display**’ list and using the arrow ‘**>**’ move this to the ‘**Display in Report**’



- Click **'Apply'**

Note: You can use the **%** sign to do a wildcard search rather than entering specific information in the search bar. Similar to *** in Saffron.

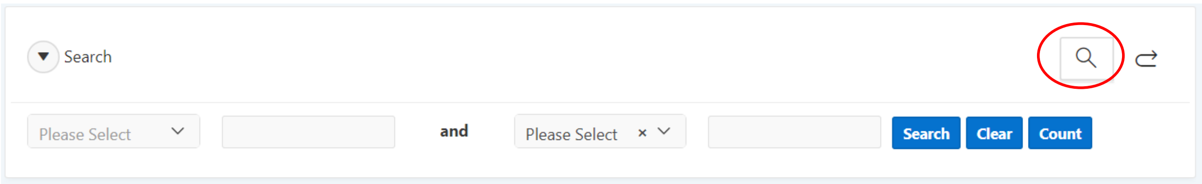
Note: You can save this view by clicking **'Actions'** and then select **'Save Report'**. Give the report a name and a description and click **'Apply'**. You will now see



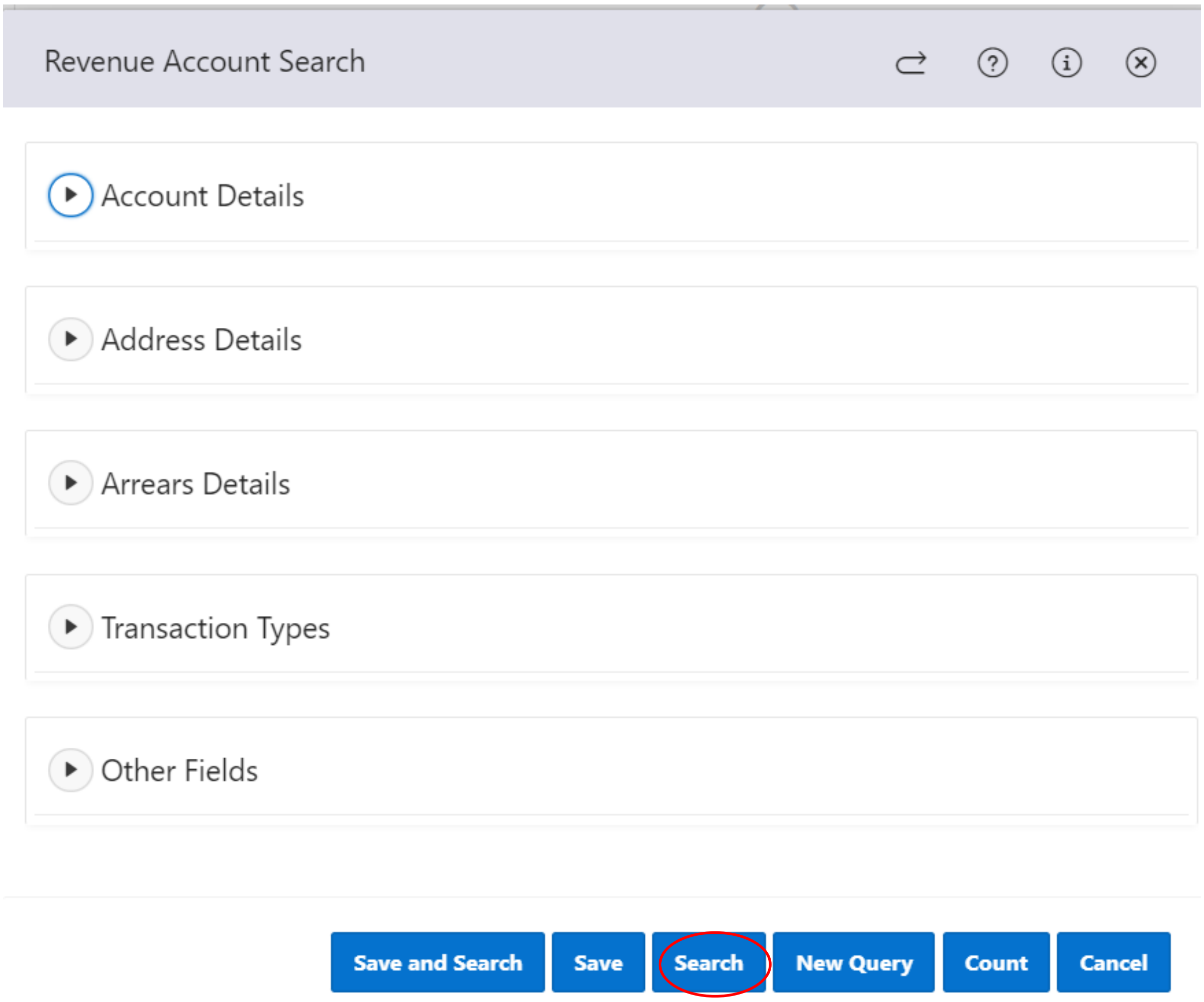
the report has been applied and you can change the report back to the standard by using the new column next to **'Actions'**.

2.5 Advance Search

- From any module area you will find the search bar at the top and on the right-hand side you will find a magnifying glass for the **'Advanced Search'** which you will select.



- From here use the search options to define how you would like to search. The search options are split into multiple options depending on your module area

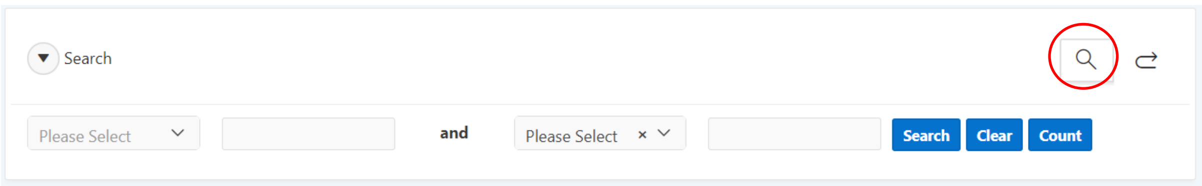


- Once you have completed any of the search requirements click **'Search'**

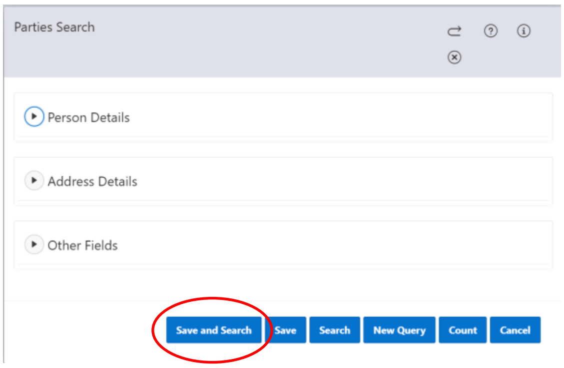
Note: You can use the % sign to do a wildcard search rather than entering specific information in the search bar. Similar to *** in Saffron.

2.6 Save a Search

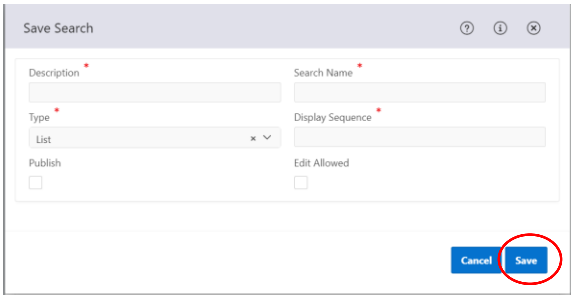
- From any module area you will find the search bar at the top and on the right-hand side you will find a magnifying glass for the **'Advanced Search'** which you will select.



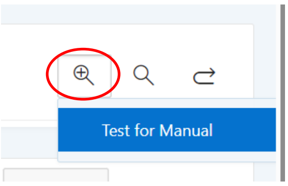
- From here use the search options to define how you would like to search. The search options are split into multiple options depending on your module area



- Once you have completed any of the search requirements click **‘Save and Search’**
- Enter all the information in the **‘Save Search’** wizard



- Click **‘Save’**
- Saved Searches are now accessed via the display card or magnifying glass with the plus sign **‘Saved Searches’**

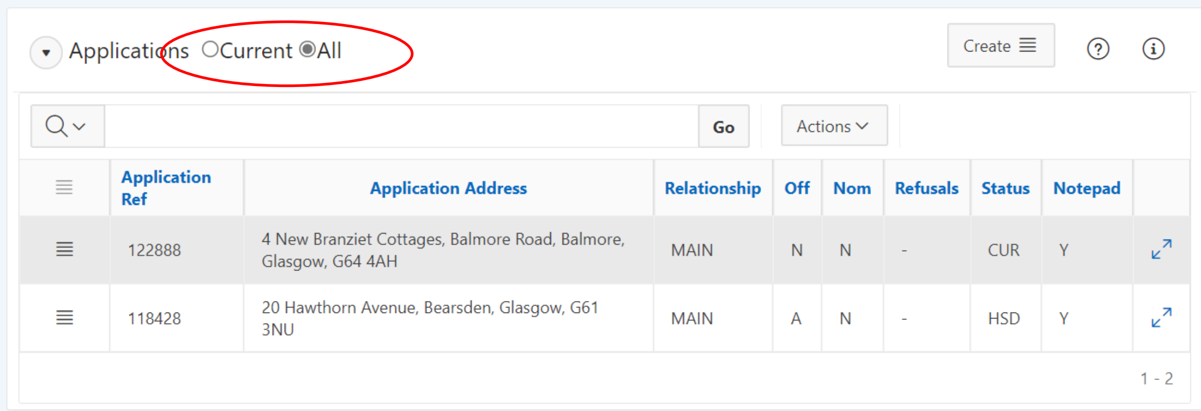


- You can only use one number for Saved Searches are now accessed via the display card or magnifying glass with the plus sign **‘Saved Searches’**

Note: You can only use one number for **‘Display Sequence’** per saved search. Always best to start at 1 and work your way through the numbers.

2.8 Viewing All Active Common Housing Register Applications (CHR)

- In **‘Parties’**, search for the person using the search or advanced search options
- Select the person
- From the banner at the top click **‘More’** and then **‘Applications’**
- Click the **‘Current’** tab for current applications or **‘All’** for the history of offers.



Applications ○Current ◉All

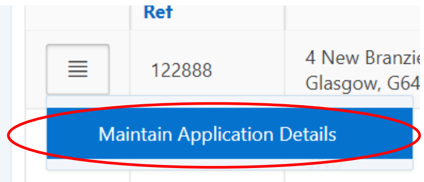
Application Ref	Application Address	Relationship	Off	Nom	Refusals	Status	Notepad
122888	4 New Branziet Cottages, Balmore Road, Balmore, Glasgow, G64 4AH	MAIN	N	N	-	CUR	Y
118428	20 Hawthorn Avenue, Bearsden, Glasgow, G61 3NU	MAIN	A	N	-	HSD	Y

1 - 2

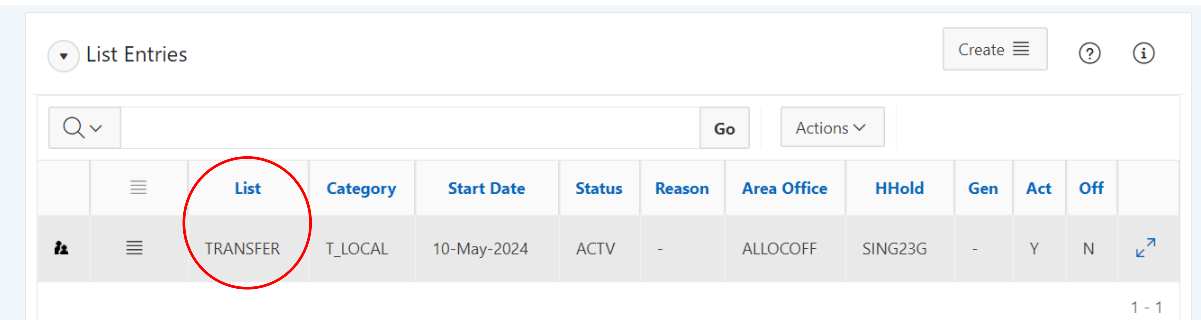
Note: You can **'Row Action'** the application and select **'Maintain Application Details'** which will take you to the tenant's application.

2.9 Check What List a Tenant's Application is On

- In **'Parties'**, search for the person using the search or advanced search options
- Select the person
- From the banner at the top click **'More'** and then **'Applications'**
- **'Row Action'** the application you need to check and select **'Maintain Application Details'**



- From the banner at the top click **'More'** and then **'List Entries'**
- Check the **'List'** column which will advise what list the tenant is on.



List Entries

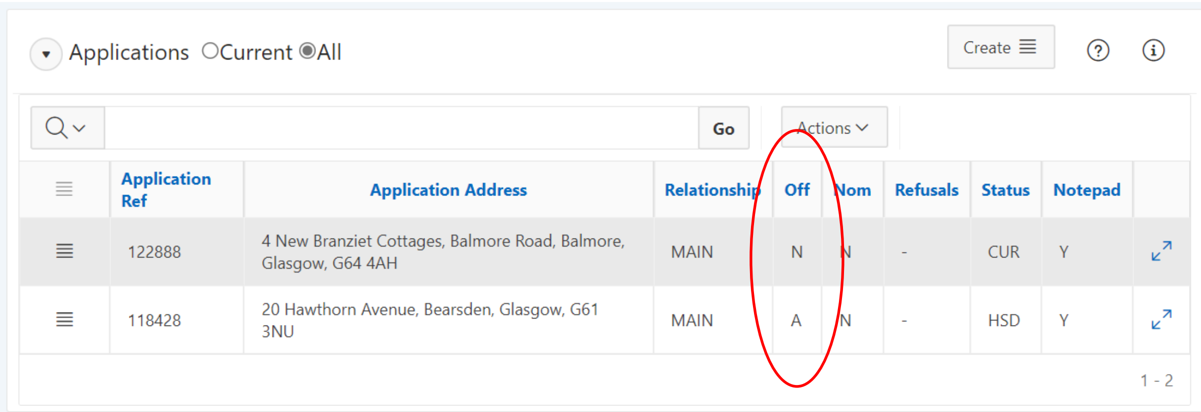
List	Category	Start Date	Status	Reason	Area Office	HHold	Gen	Act	Off
TRANSFER	T_LOCAL	10-May-2024	ACTV	-	ALLOCOFF	SING23G	-	Y	N

1 - 1

Note: GGS – List of Garage Ground Sites, Homeless – List for Homeless Assessments, LUP – List for Lock Ups, Register – List for General Needs, Transfer – List for General Needs Transfers

2.10 Check if a Tenant is Under Offer

- In **‘Parties’**, search for the person using the search or advanced search options
- Select the person
- From the banner at the top click **‘More’** and then **‘Applications’**
- Check the **‘OFF’** column which will advise if the tenant is under offer or has accepted the offer.



Applications ○Current ◉All

Create

Go

Actions

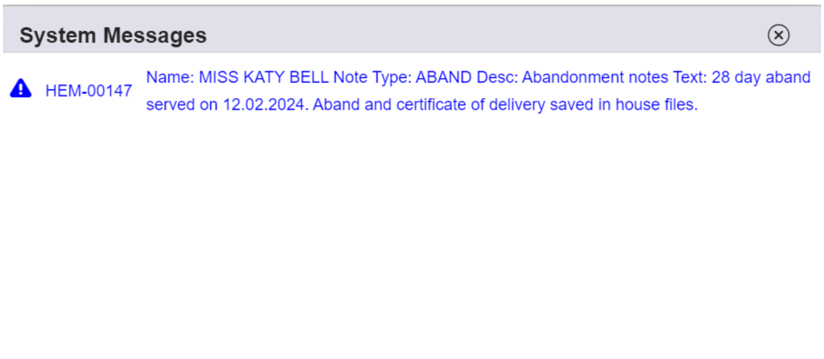
	Application Ref	Application Address	Relationship	Off	Nom	Refusals	Status	Notepad	
	122888	4 New Branziet Cottages, Balmore Road, Balmore, Glasgow, G64 4AH	MAIN	N	N	-	CUR	Y	
	118428	20 Hawthorn Avenue, Bearsden, Glasgow, G61 3NU	MAIN	A	N	-	HSD	Y	

1 - 2

Note: O – Under Offer, N – No Offer, A - Accepted

2.11 Check if an Abandonment has been Served

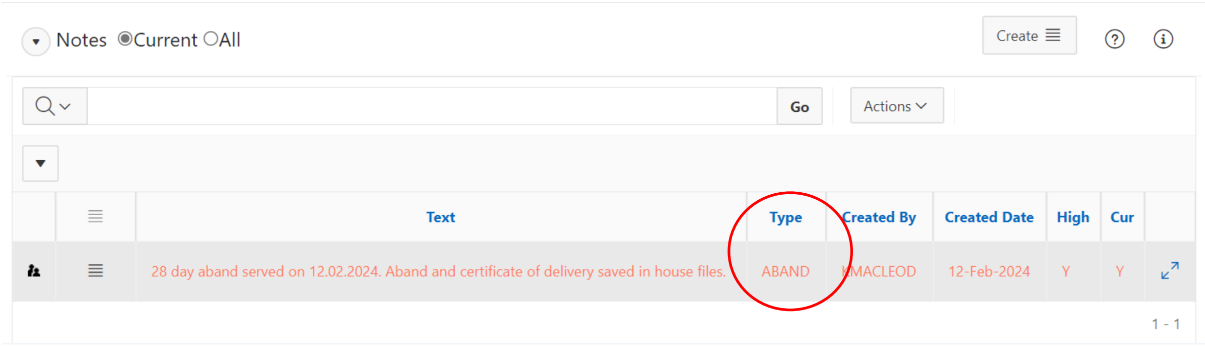
- In **‘Tenancies’**, search for the person using the search or advanced search options
- Select the person you are looking to check the abandonment procedure of
- A warning pop up should appear advising if the abandonment has been served and the dates of the aband



System Messages

HEM-00147 Name: MISS KATY BELL Note Type: ABAND Desc: Abandonment notes Text: 28 day aband served on 12.02.2024. Aband and certificate of delivery saved in house files.

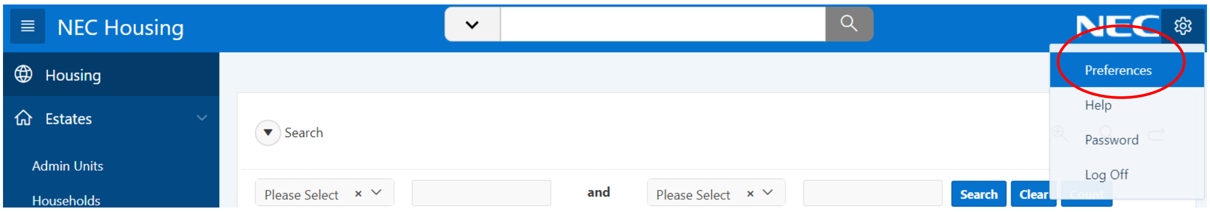
- Click **‘More’** and then **‘Notes’** where you can find any notes relating to the abandonment procedure. These can be filtered by clicking on **‘Type’** and selecting the note type **‘ABAND’**



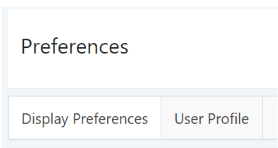
Note: The warning pop up should also appear in the rent account and properties. There should also be a status on the main page in **'Tenancies'** under the **'Expand'** advising **'Abandonment Notice Served'**.

2.12 Update your System Preferences

- From any page click the **'Gear'** on the top right-hand corner to open **'System Menu'**



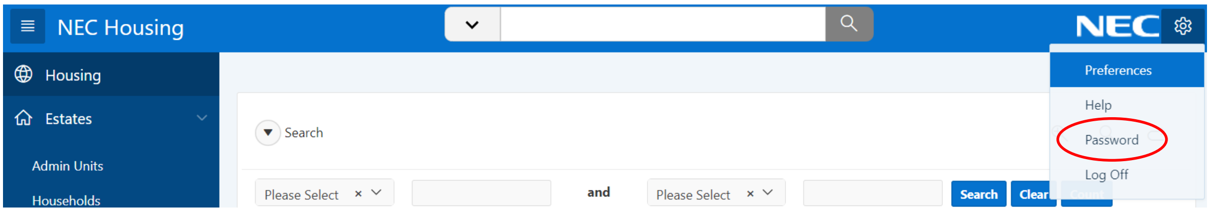
- Click **'Preferences'**
- From here you can update your **'Display Preferences'** and **'User Profile'**



- Once any changes are made click **'Save'**

2.13 Update your System Password

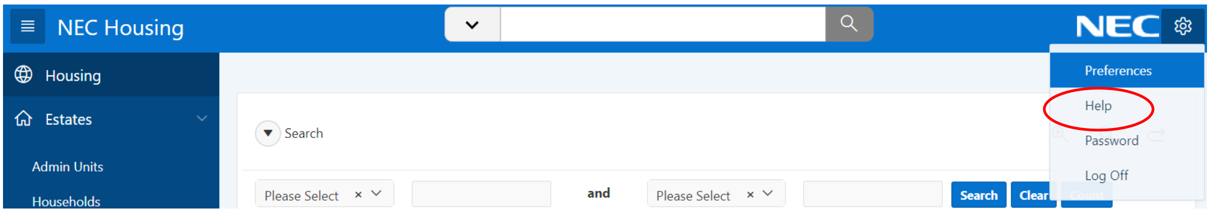
- From any page click the **'Gear'** on the top right-hand corner to open **'System Menu'**



- Click **‘Password’**
- From here you can create a new password for your login.
- Click **‘Save’**

2.14 Access NEC help

- From any page click the **‘Gear’** on the top right-hand corner to open **‘System Menu’**



- Click **‘Help’** and from here you can use NEC’s help by searching for your query.

Note: Alternatively, ask a member of the IHMS or Systems Team if the information isn’t in the manuals.

3. Household and Person Management

3.1 Parties and Households

Parties

People represent all parties held on the database. These people may be tenants, family members, leaseholders, or applicants for housing.

Households

Households are groups of people typically living at the same address, for example a family, where at least one of the household members is a tenant of the organisation.

- Parties and households can be created prior to creating tenancies or as part of the process.
- Parties and households do not have to be part of a tenancy.
- The creating and updating of parties can be actioned from either the Parties or Households product areas.

Interested Parties

Interested parties are used throughout NEC Housing. They are people or organisations that perform specific functions such as inspectors in repairs, housing visitors or homeless caseworkers in allocations, stores, and repairs operatives in Contractors.

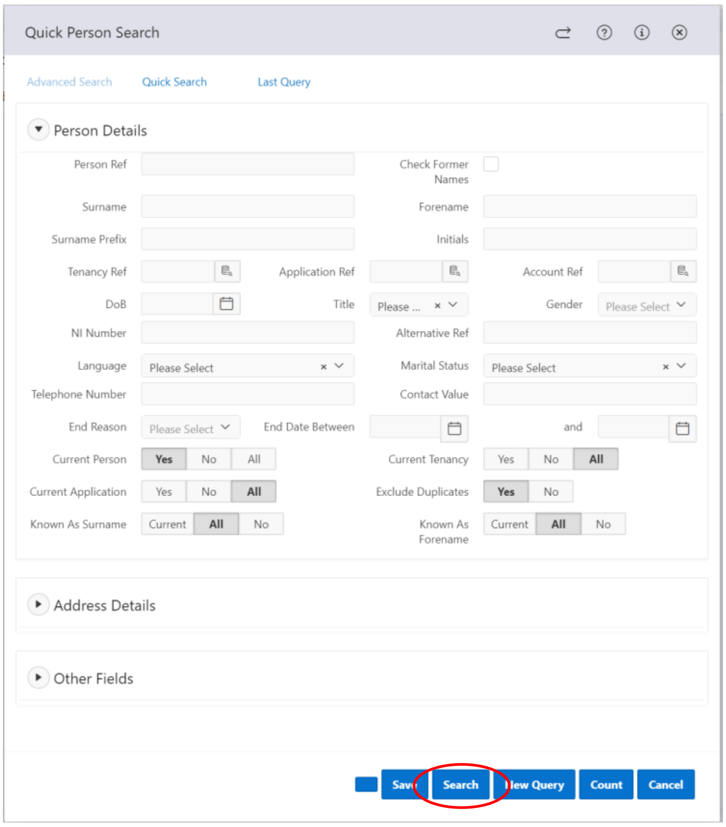
3.2 Creating People

- In **'Parties'**, click the **'Create'** and then **'Create a Person'**

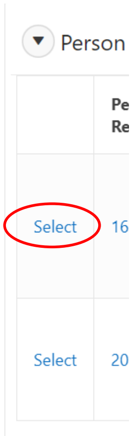
- Complete the **'Quick Person Search'** wizard by entering the person's details. This is to prevent duplicate records.

Info:

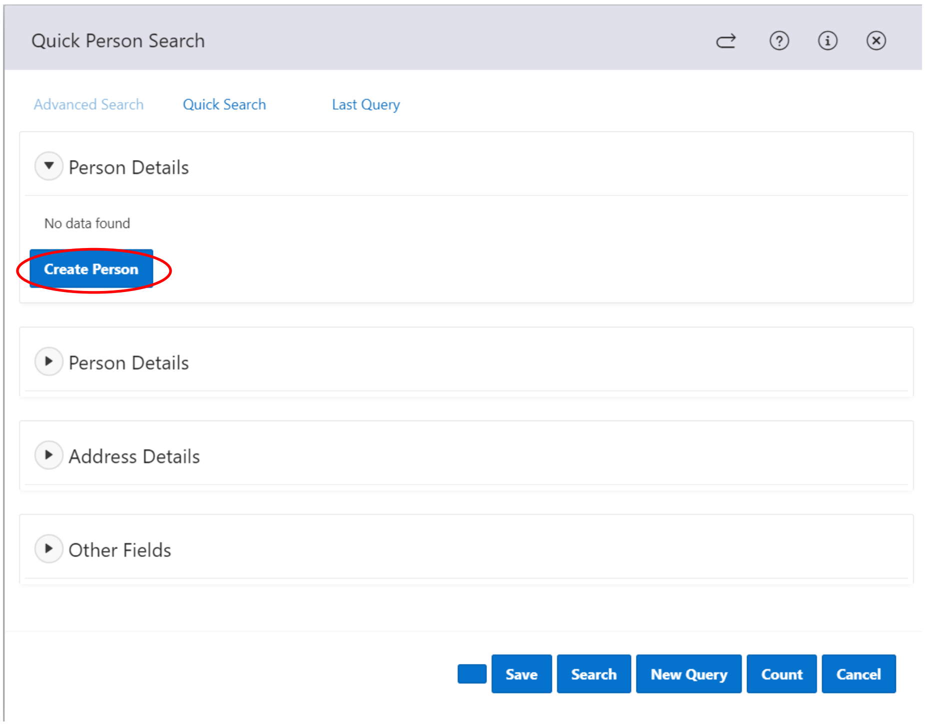
To prevent duplicate records being created, the system requires you to check to see if the person already exists in the database before you create a new record for them.



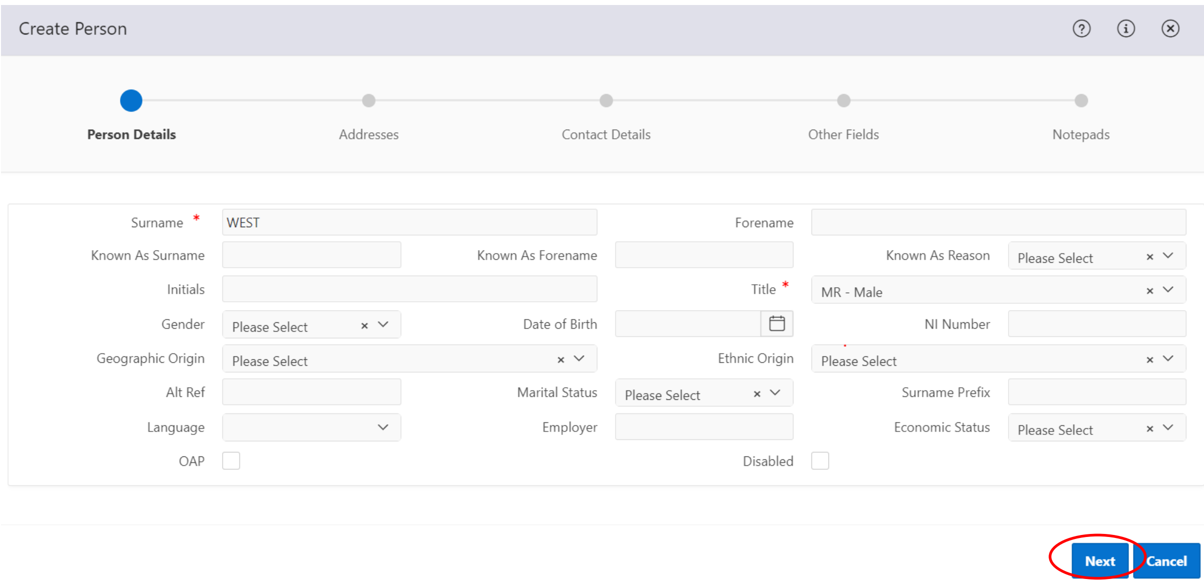
- If a record returns that matches who you want to create, click **'Select'** on that person and this ends the **'Create a Person'** wizard.



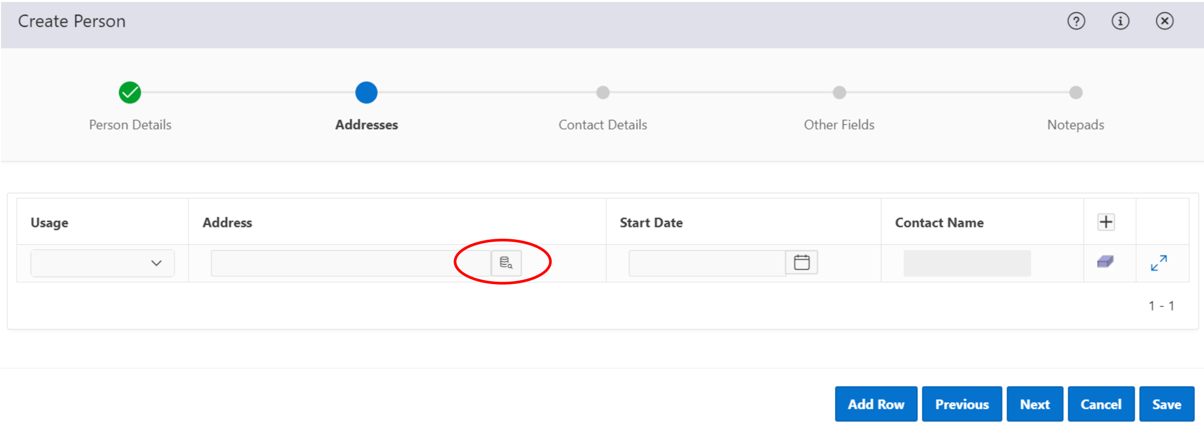
- If a person record does not match the person you are trying to create, or the system displays a message of **'No Data Found'** click **'Create Person'**



- Complete the **'Create Person'** wizard by first completing the **'Person Details'** where you add in the person's details and then click **'Next'**

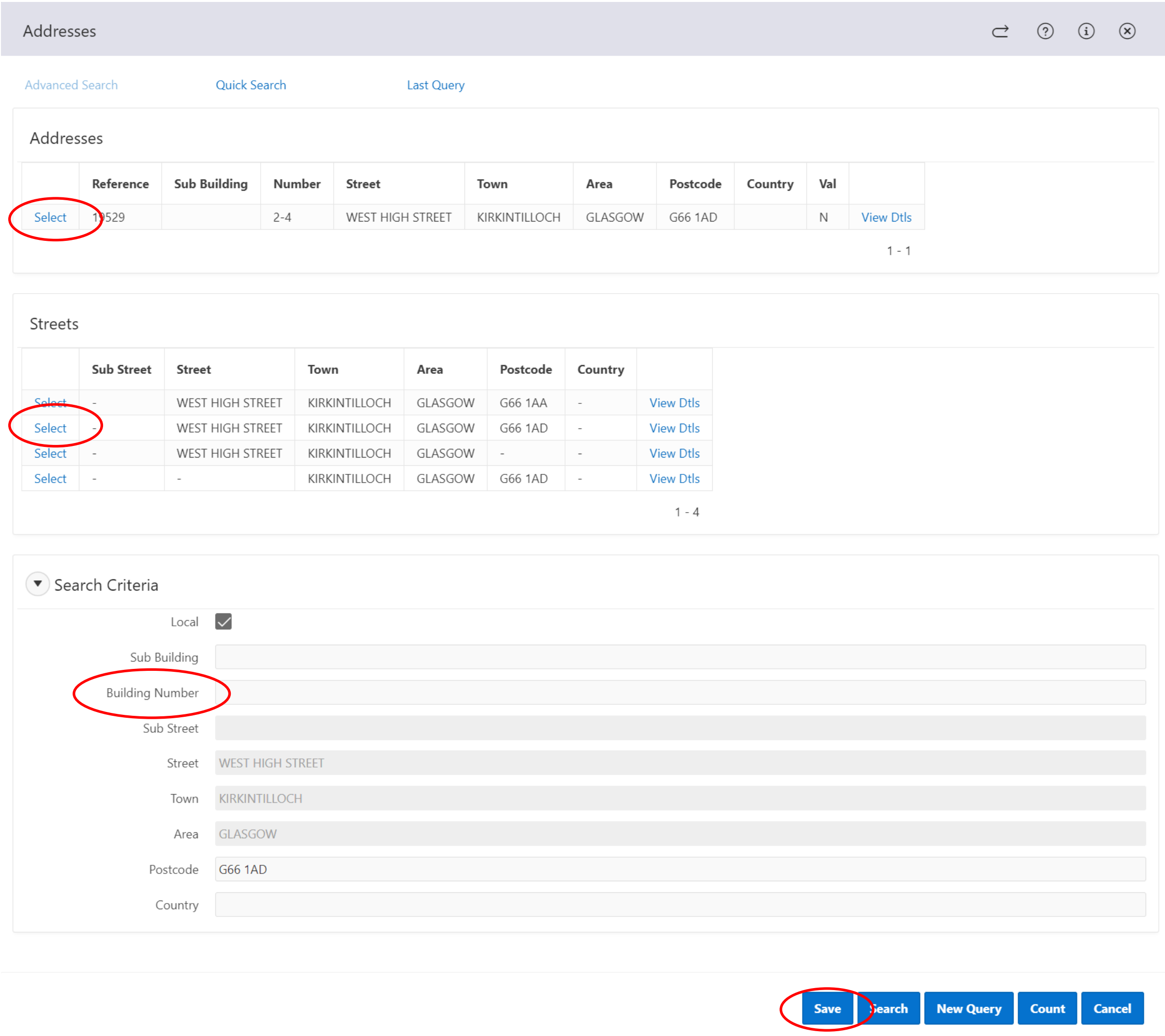


- Complete the **'Addresses'** section of the **'Create Person'** by selecting the **'Open Search'** on the Address column and using this to find the person's address.

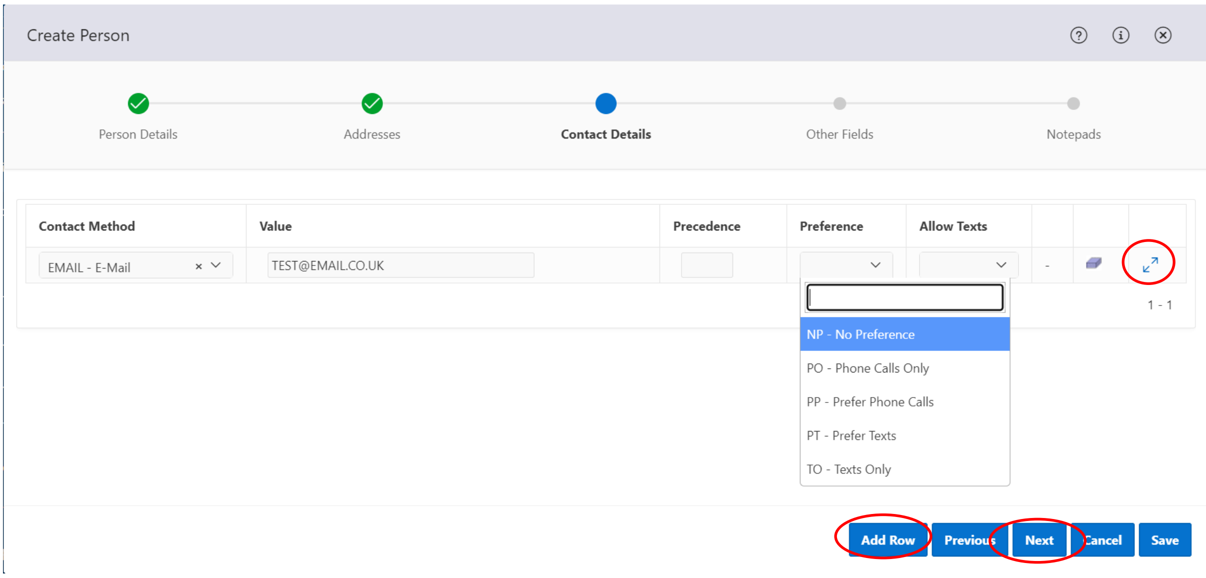


- This opens the **'Addresses'** search where you must insert the address you need, making sure to use the postcode, area or town. Click **'Search'**

- If the address shows click **'Select'** on the address, if it does not click **'Select'** on the Street and then add the building number and click **'Save'**



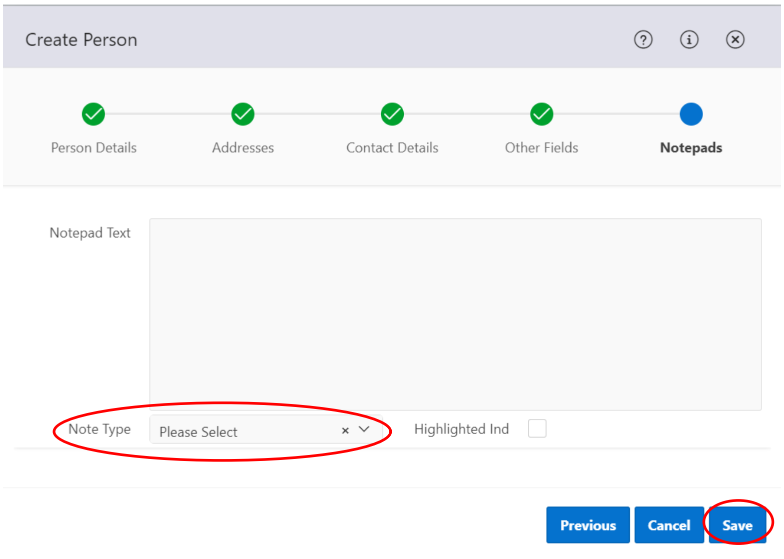
- This brings you back to the **'Addresses'** page on **'Create a Person'** wizard where you need to add the start date and contact name if required. Once done click **'Next'**
- Complete the **'Contact Details'** page by adding the person's contact details by clicking **'Add Row'** for each new contact method, enter the details in value, and selecting a preference. You can also click the arrows to expand where you can add a start date, contact name and comments if required. Once completed click **'Next'**



Info:

A precedence value can be added based on which contact name is displayed by order numbering. Also, you can specify whether the person can be sent mobile phone text messages.

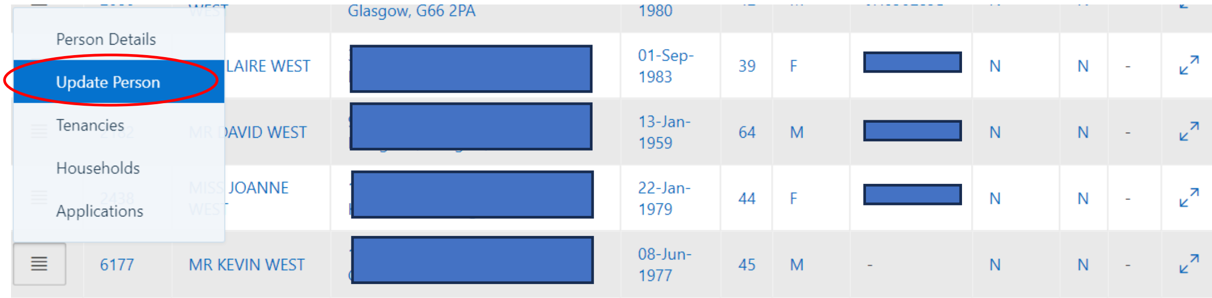
- Complete the **‘Other Fields’** page if required to place an Alias and then click **‘Next’**.
- Complete the **‘Notepads’** page if you require to place a note for Consent, Warning Messages or Interpreter Required.



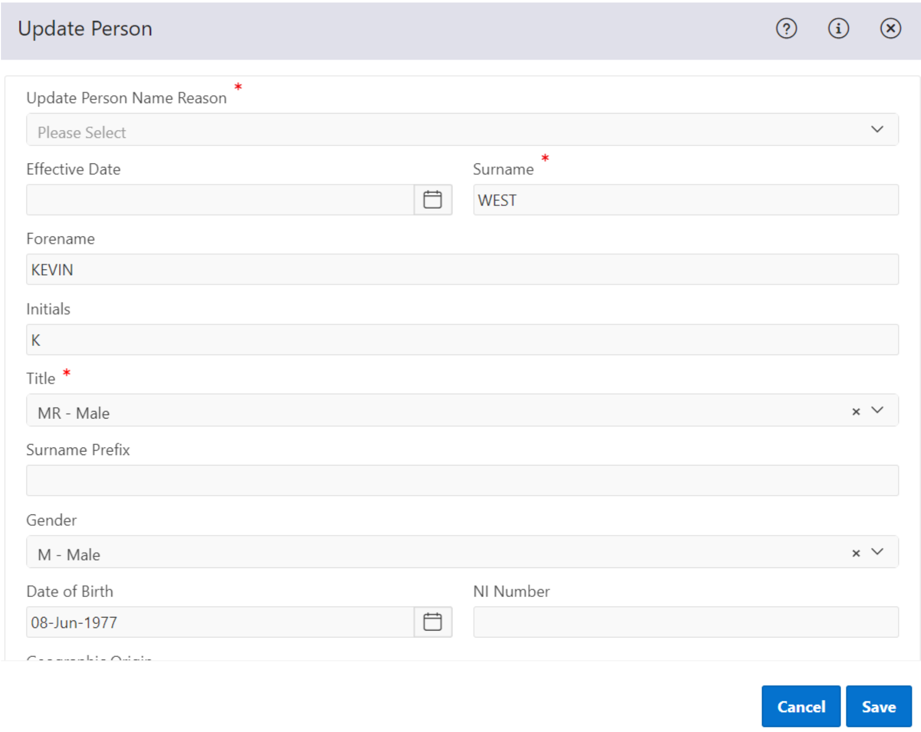
- Click **‘Save’**

3.3 Update or End People

- In **'Parties'**, search for the person using the search or advanced search options
- **'Row Action'** on the person who you would like to update and select **'Update Person'**



- Complete the **'Update Person'** wizard, ensuring to add an end date and end date reason if required.



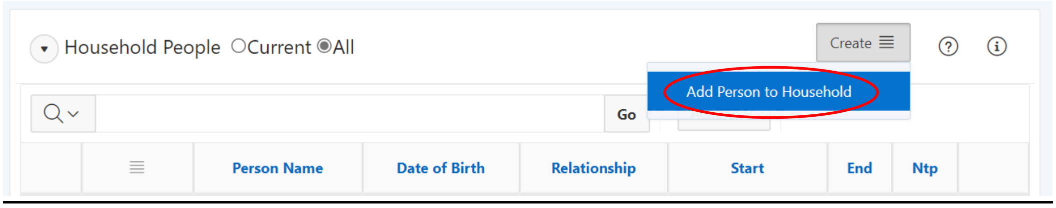
- Click **'Save'**

3.4 Household Members

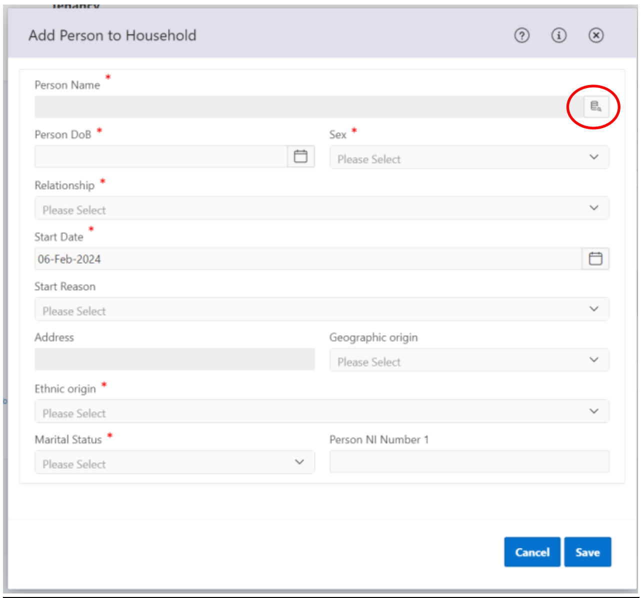
3.4.1 Add Household Members

- In **'Households'**, search for the household of the main tenant using the basic or advanced search options
- Click **'Row Action'** on the main tenant and select **'Household Details'**

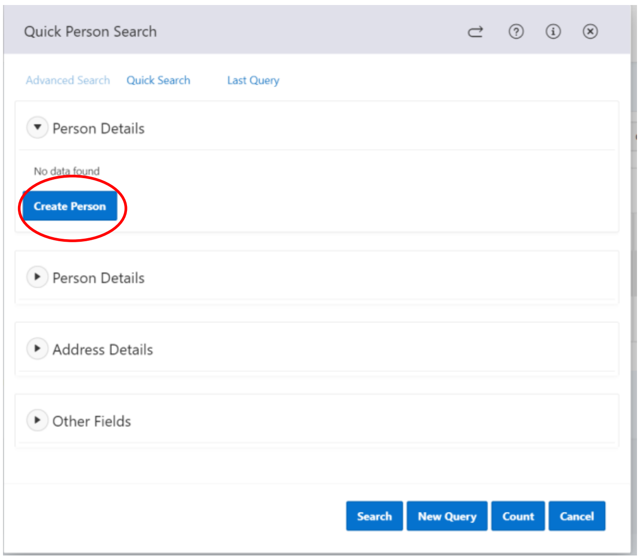
- When the **'Household Details'** page loads, click **'Create'** on the right-hand side and then click **'Add Person to Household'**



- Click **'Open Search'** and search the system to see if the person already exists



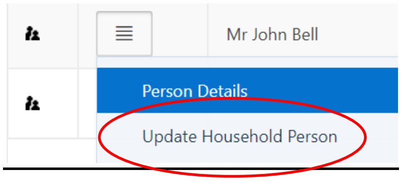
- If the person does not exists click **'Create Person'** and follow the **'Create Person'** wizard ensuring you've completed all the mandatory fields.



- Once person has been selected or created on system, complete the **‘Add Person to Household’** wizard, ensuring you’ve completed all the mandatory fields
  - Person DoB: date of birth of the household member
  - Sex
  - Relationship: relationship of this new member to the main applicant
  - Start Reason: not mandatory but can provide extra information (refer to list on TABLES tab)
  - Start Date
  - Marital Status
- Click **‘Save’**

3.4.2 Update and Remove Household Members

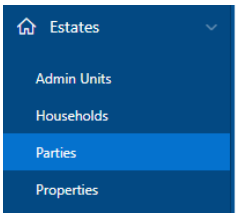
- In **‘Households’**, search for the household of the main tenant using the basic or advanced search options
- Click **‘Row Action’** on the main tenant and select **‘Household Details’**
- In the **‘Household People’** section at the bottom, look for the household member you want to update or remove
- Click **‘Row Action’** next to their name and then Click **‘Update Household Person’**



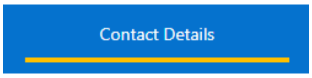
- In the **‘Update Person to Household’** wizard, either update their details or use the **‘Calendar’** on the **‘End Date’** field to put the date the person was no longer part of the household
- If removing the person select a reason as to why they left the household in the **‘End Reason’** field
- Click **‘Save’**

3.5 Create and Update Contact Details

- In **‘Parties’**, search for the person using the search or advanced search options



- Click anywhere on their line to enter the **‘Person Details’** page
- From the banner at the top, click **‘More’** and then **‘Contact Details’**

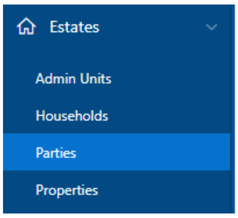


- To create or update the contact details click **‘Bulk Row Action’** and then **‘Maintain Contact Details’**
- To add a new contact method;
    - Click **‘Add Row’**
    - Use the **‘Contact Method’** field to select the contact method, enter the number or email address, whether this is a preference and if it allows texts and is verified.
    - Click **‘Save’**
- To update a contact method
    - Select the detail you wish to edit and update their information, remember to use the **‘End’** function to end a contact method they are no longer using.

    - Click **‘Save’**

3.6 Create and Update Mailing Addresses

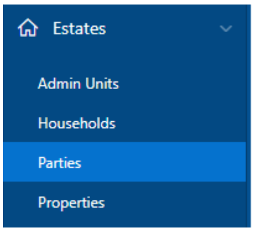
- In **‘Parties’** search for a record using the search or advanced search options



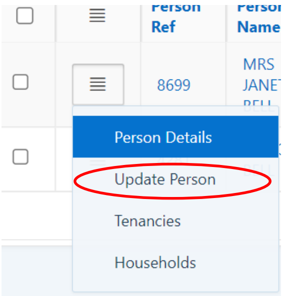
- Click anywhere on their line to enter the Person Details page
- From the banner at the top, click **‘More’** and then **‘Address Usage’**
- Click **‘Create’** and then **‘Address Usage’** to create a new mailing address or **‘Row Action’** the address and select **‘Update Address Usage’**
- In the **‘Address Usage Field’**, select from the drop down the address usage to use
- Click **‘Save’**

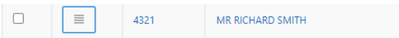
3.7 Create and Update Name Changes

- In **‘Parties’**, search for a record using the search or advanced search options

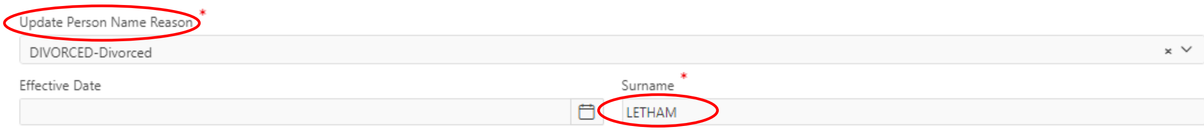


‘Row Action’ the person whose name needs changed and select **‘Update Person’**

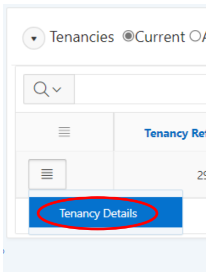




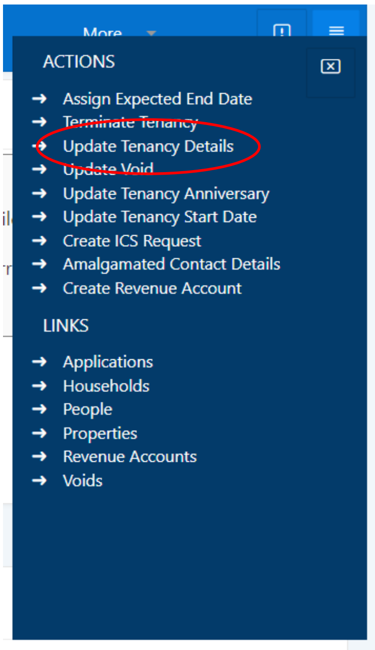
- In the **‘Update Person’** wizard, type in a new surname, and then select an option **‘Update Person Name Reason’** field at the top



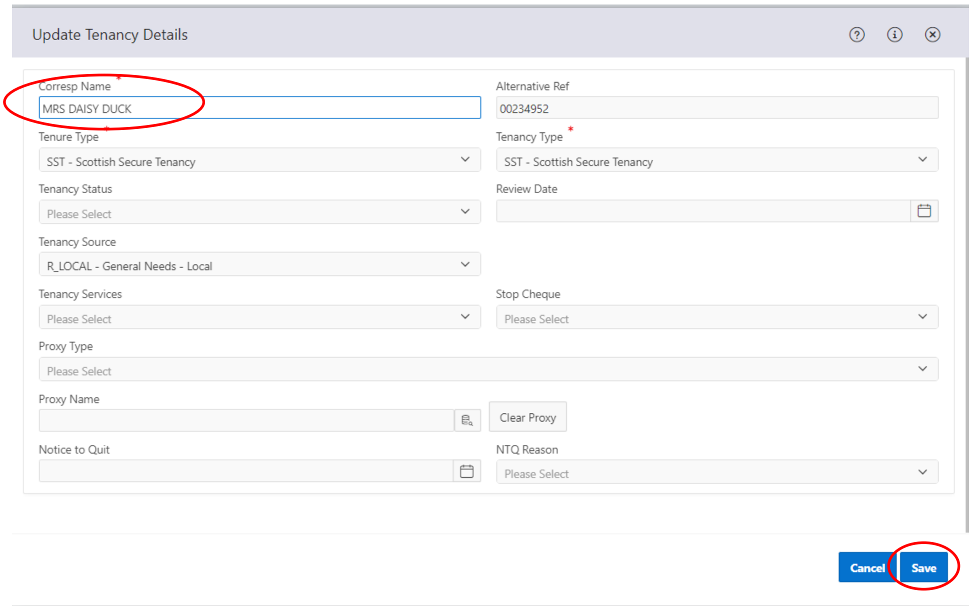
- Once details have been changed, click **‘Save’**
- Click ‘**More**’ and then **‘Tenancies’**
- **‘Row Action’** the current tenancy needing updated and click **‘Tenancy Details’**



- Click **‘Action’** and click **‘Update Tenancy Details’**



- Complete the **'Update Tenancy Details'** wizard ensuring to update the **'Corresp Name'** section



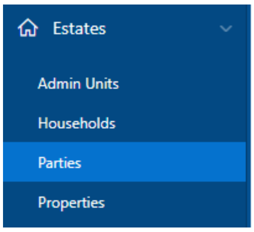
- Click **'Save'**

Note: You will need to manually update any other tenancy the tenant has to include the new name change.

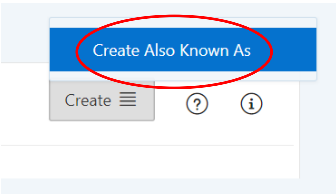
3.8 Aliases

3.8.1 Add Aliases

- In **'Parties'**, search for a record using the search or advanced search options



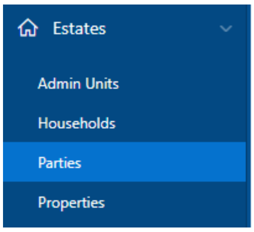
- Select the person you'd like to add an alias for
- Click **'More'** and then **'Also Known As'**
- Click **'Create'** and then **'Create Also Known As'**



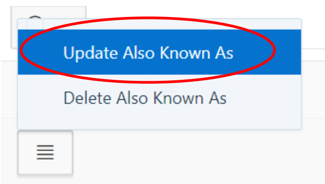
- Complete the **'Create Also Known As'** wizard
- Once details have been changed, click **'Save'**

3.8.2 Update or Remove Aliases

- In **'Parties'**, search for a record using the search or advanced search options



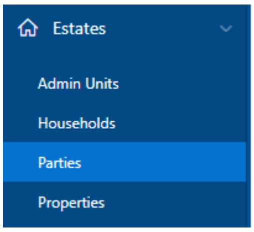
- Select the person you'd like to add an alias for
- Click **'More'** and then **'Also Known As'**
- **'Row Action'** the alias and click **'Update Also Known As'**



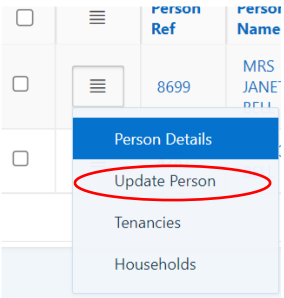
- Update the details on the **'Create Also Known As'** wizard, remembering to enter an end date if the alias has ended.
- Once details have been changed, click **'Save'**

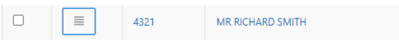
3.9 Add National Insurance Numbers

- In **'Parties'**, search for a record using the search or advanced search options



- **'Row Action'** the person whose name needs changed and select **'Update Person'**





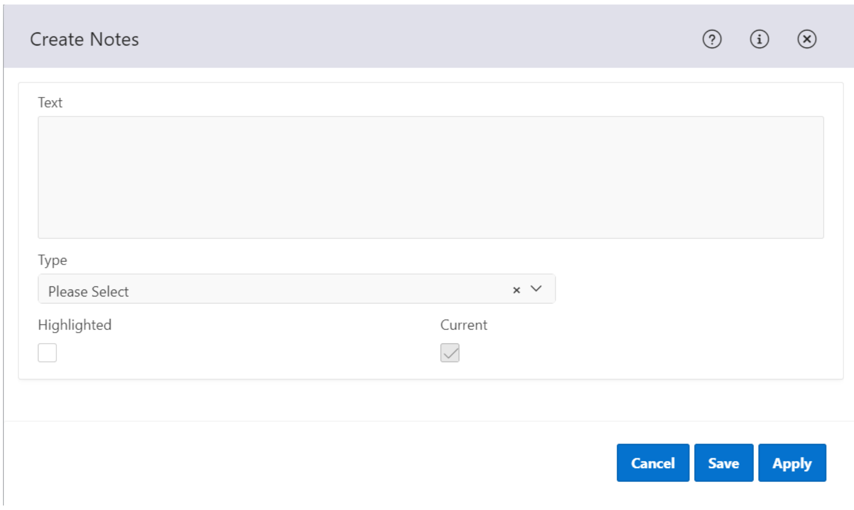
- In the **'Update Person'** wizard, type in the National Insurance Number

- Once details have been changed, click **'Save'**

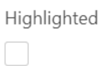
3.10 Account Notepad Entry, Consent and Warning Messages

3.10.1 Creating a Note, Adding Consent and Warning Messages

- In the page you'd like to add a note to select **'Notes'** from the **'More'** dropdown.
- Select **'Create'** and then **'Create Notepad Entry'**



- Complete the form, remembering to add a note type from the drop down and tick the **'Highlighted'** section for the note to show as a warning (Can only be set up in **'Parties'** only) or to pin the note to the top of the notepad.

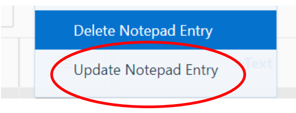


- Click **'Save'**

Note: When creating warning messages, you should select the **'Warning Message'** note type and ensure you tick the **'Highlighted'** section as this generates the warning pop up, but this can only be set up in **'Parties'** only.

3.10.2 Updating a Note, Consents and Warning Messages

- In the page you'd like to add a note to select **'Notes'** from the **'More'** dropdown.
- **'Row Action'** the note you'd like to update and select **'Update Notepad Entry'**



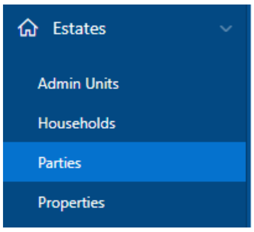
- Here you can update the note text and also untick the **'Highlighted'** section if the note if it is no longer required as a warning or to be pinned.
- Click **'Save'**

Note: When unticking the **'Highlighted'** section for warnings a new note must be created explaining why the warning was removed.

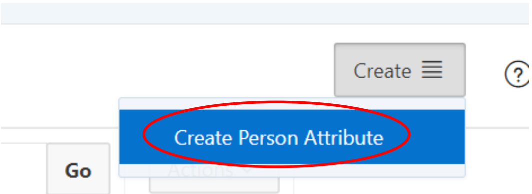
3.11 Person Attributes

3.11.1 Add Person Attributes

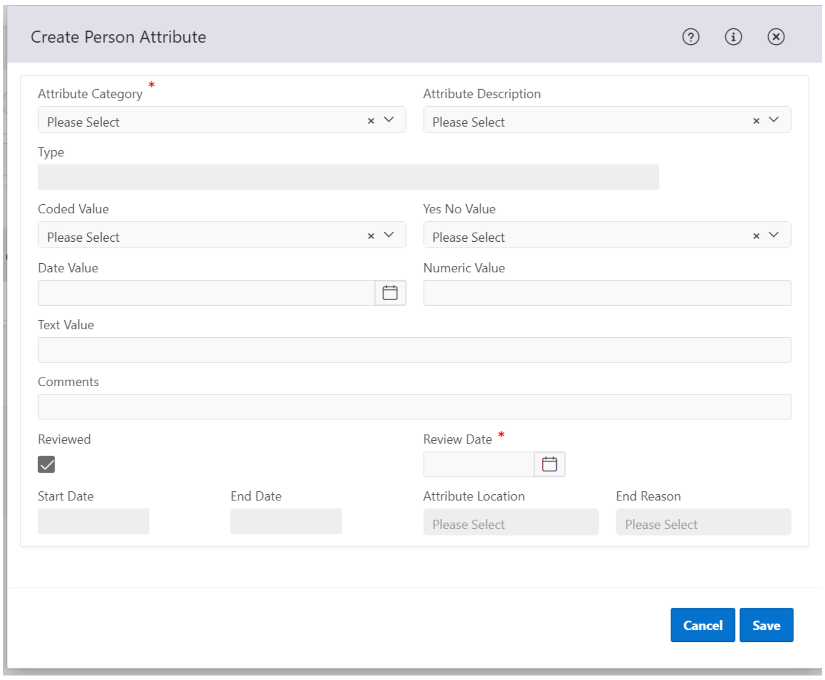
- In **'Parties'**, search for a record using the search or advanced search options



- Select the person you'd like to add an attribute to
- Click **'More'** and then **'Person Attributes'**
- Select **'Create'** and then **'Create Person Attribute'**



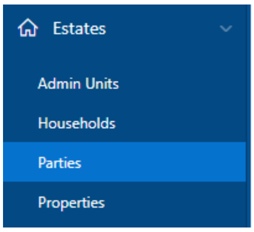
- Complete the **'Create Person Attribute'** wizard.



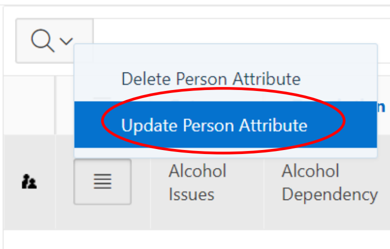
- Click **'Save'**

3.11.2 Update or Remove Person Attributes

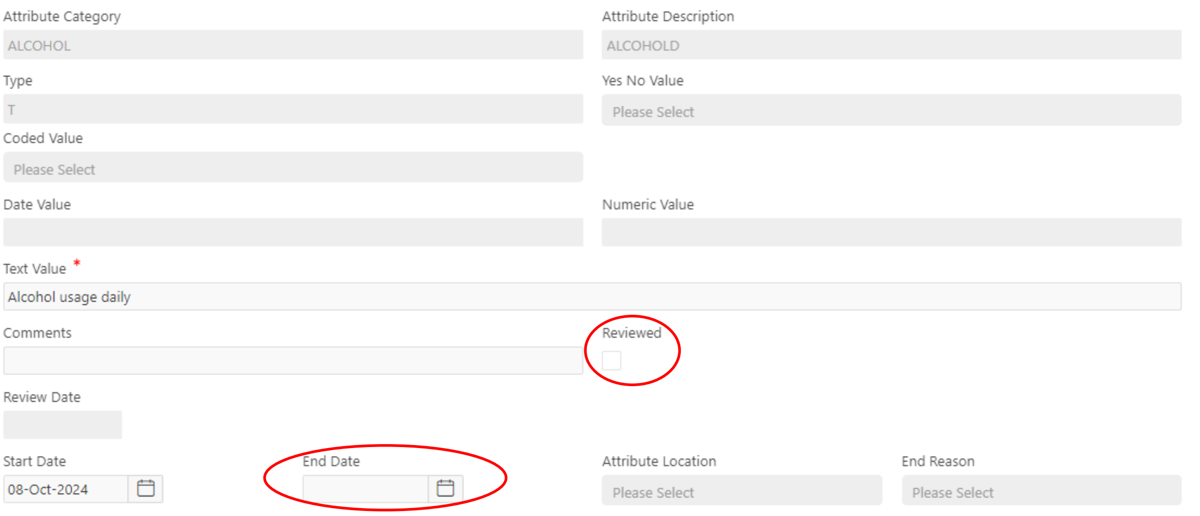
- In **'Parties'**, search for a record using the search or advanced search options



- Select the person you'd like to update or remove an attribute from
- Click **'More'** and then **'Person Attributes'**
- **'Row Action'** the attribute and select **'Update Person Attribute'**



- Update the Person Attribute Wizard with any new developments and tick the box to show it has been reviewed and ensure to add an end date and end reason if the attribute no longer applies.



- Click **'Save'**

4. Admin Units

4.1 Admin Units

Administration units are used to group properties within NEC Housing to exercise financial controls, produce reports and limit user access. Queries can also be run on admin units, for example, all void properties in the admin unit type of OFF (office) or accounts, in arrears by housing officer PAT (patch).

4.2 Admin Unit Types

Pre-defined admin unit types include:

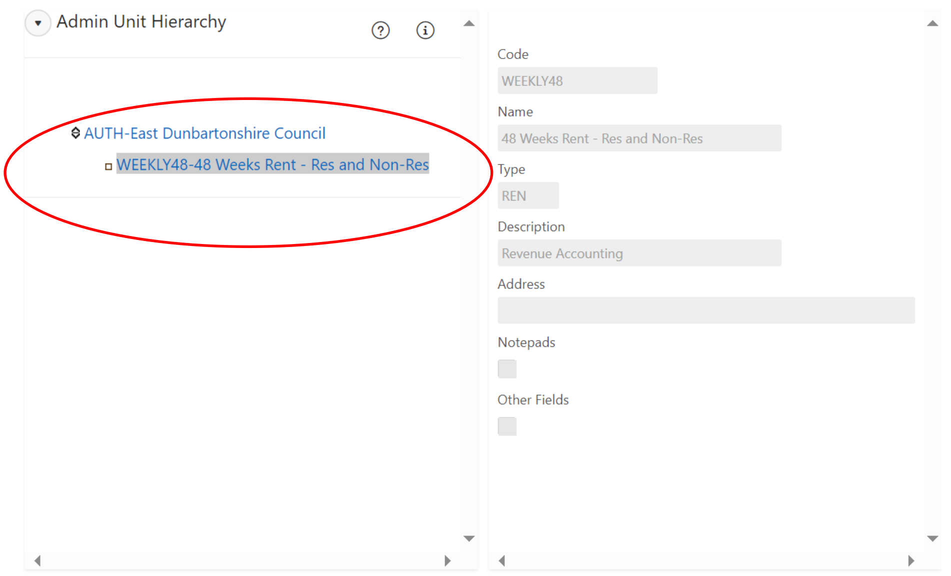
- TOP - Top Level
- OFF - Area Office
- REN - Revenue Accounting
- CPA - Cyclical Programme Area
- MPA - Maintenance Programme Area
- SER - Service Charge Admin Unit

Other examples (user-defined):

- EST - Estate
- STR - Street
- BLK - Block of Flats
- PAT - Patch
- SCH - Scheme
- WRD - Ward

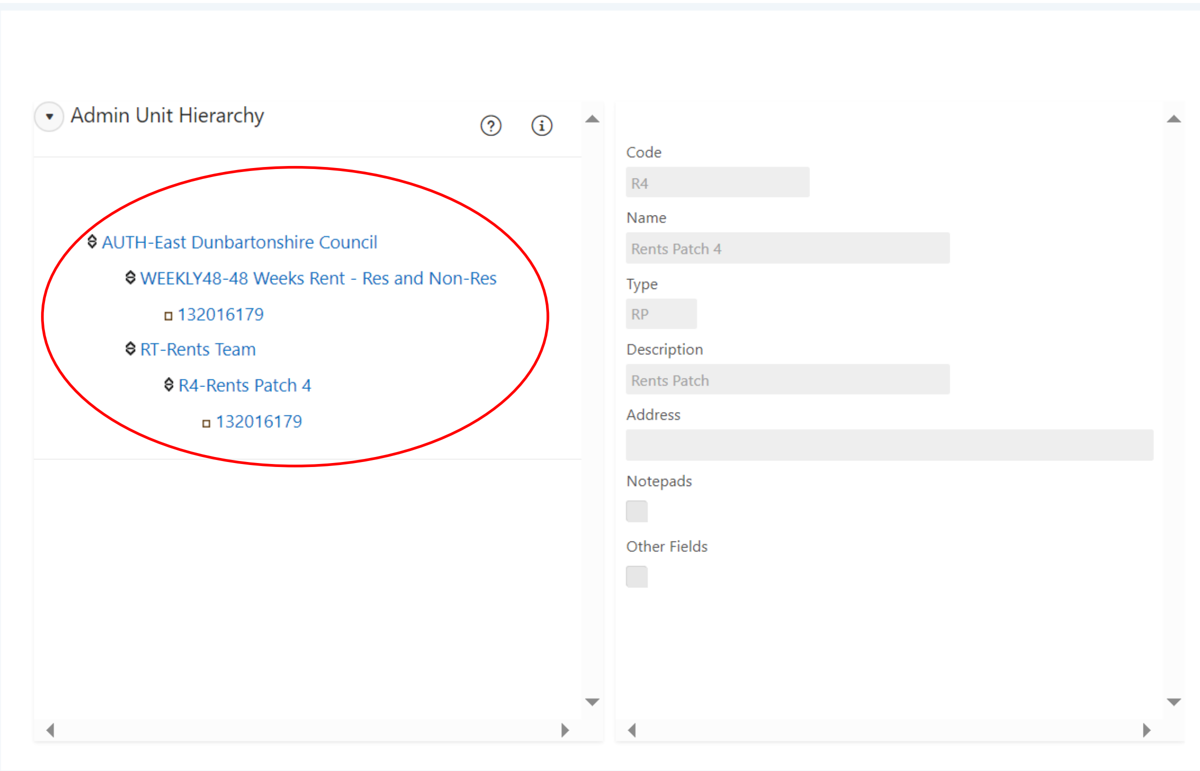
4.3 Viewing the Hierarchy of an Admin Unit

- In **'Admin Units',** search for a record using the search or advanced search options
- Select the admin unit you'd like to view
- Click **'More'** and then **'Admin Unit Hierarchy'**
- The hierarchy of the selected admin unit is displayed.



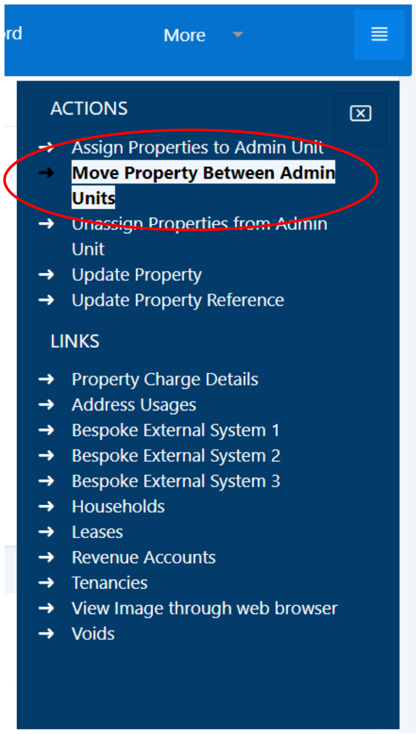
4.4 Viewing the Admin Unit Hierarchy for a Property

- In **'Properties'**, search for a record using the search or advanced search options
- Select the property whose admin unit hierarchy you'd like to check
- Click **'More'** and then **'Admin Unit Hierarchy'**
- The admin unit hierarchy for the selected property is displayed.

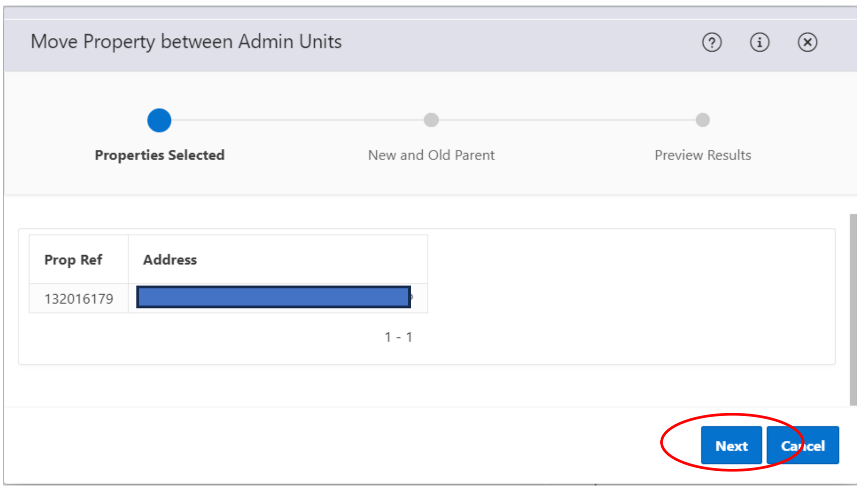


4.5 Moving a Tenancy Between Admin Units

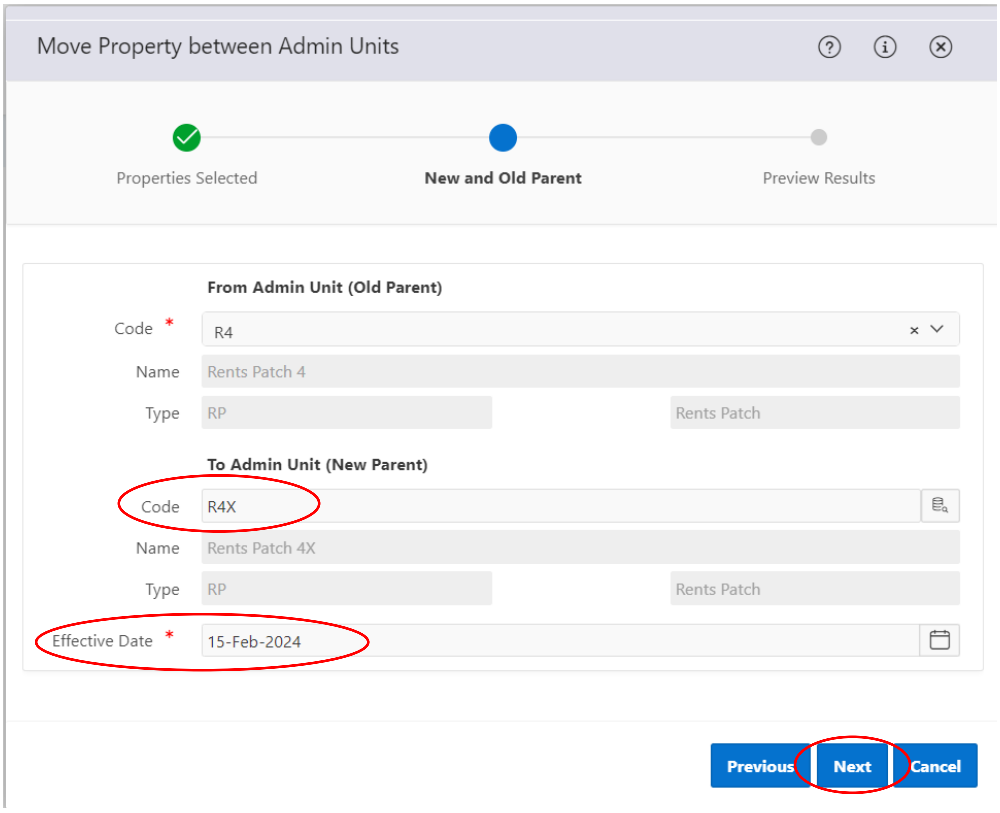
- In **'Properties'**, search for the rent account using the search or advanced search options
- Select the address you would like to update
- Click **'Actions'** in the top right-hand corner and then **'Move Property Between Admin Units'**



- Complete the **'Move Property Between Admin Units'** wizard by first confirming the correct property on the **'Properties Selected'** page and then click **'Next'**



- In the **‘New and Old Parent’** page select the current patch in the dropdown for **‘Old Parent’** and then enter the new patch code for **‘New Parent’** and enter the effective date.

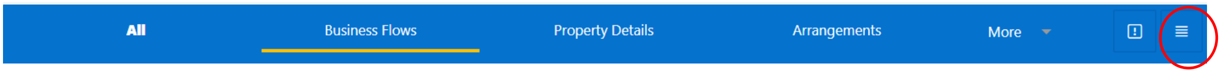


- Click **‘Next’**
- In the **‘Preview Results’** page, this will allow you to check for any warnings or errors. If there are none and the preview result shows **‘Property will be processed’**
- Click **‘Save’**

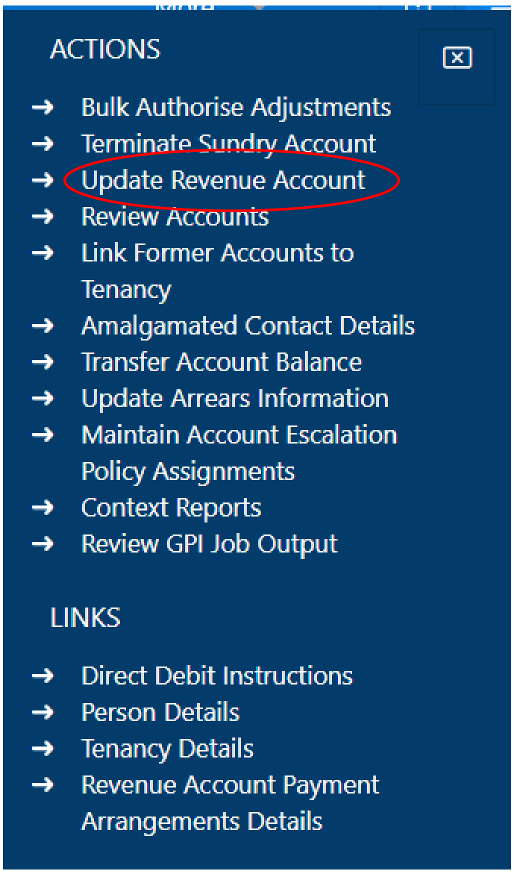
5. Rent Account Management

5.1 Updating a Revenue Account

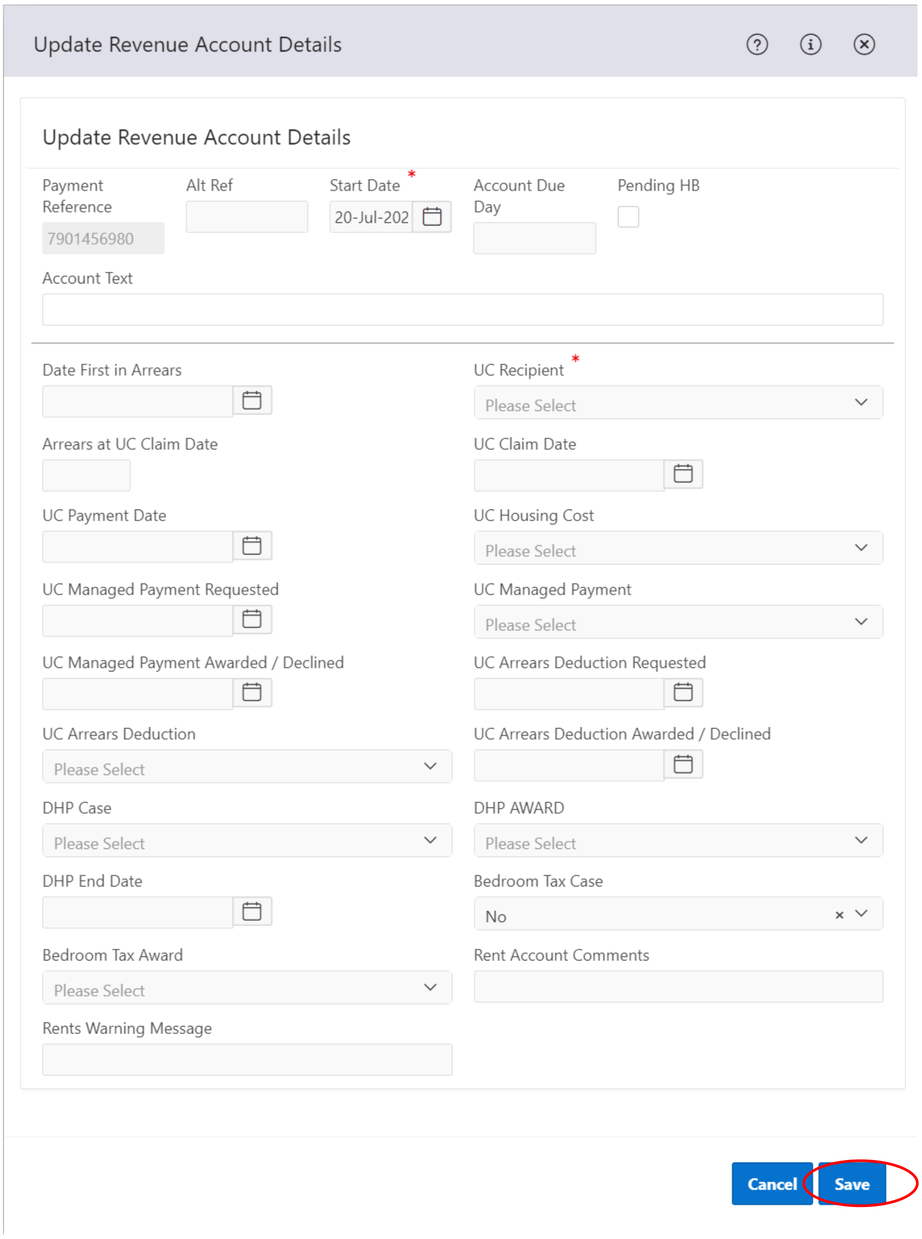
- In **'Revenue Accounts'**, search for the rent account using the search or advanced search options
- Select the account you would like to update
- Click **'Action'** at the top right of the page



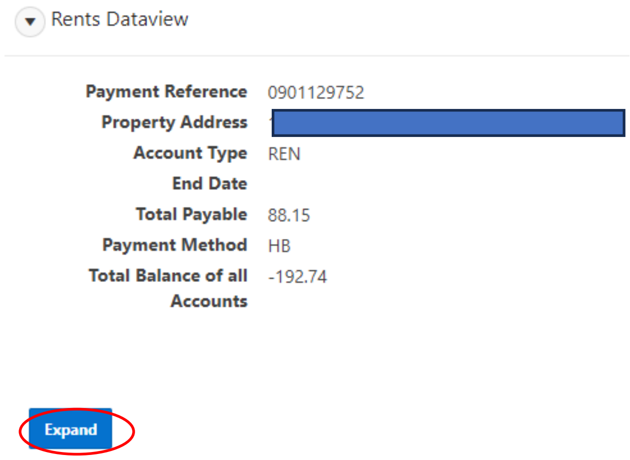
- Select **'Update Revenue Account'**



- Complete the **'Update Revenue Account Details'** wizard with all the new relevant information



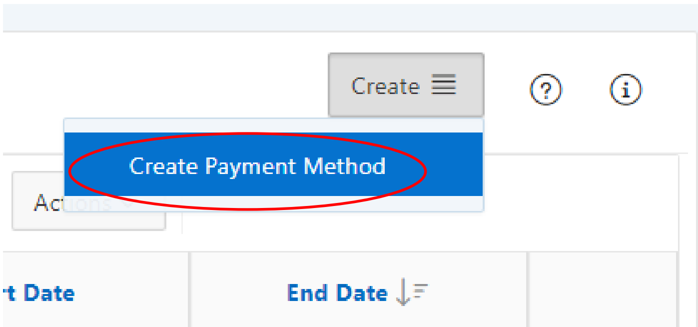
- Click **‘Save’**
- All changes should now be seen in the main rent account page under **‘Expand’**



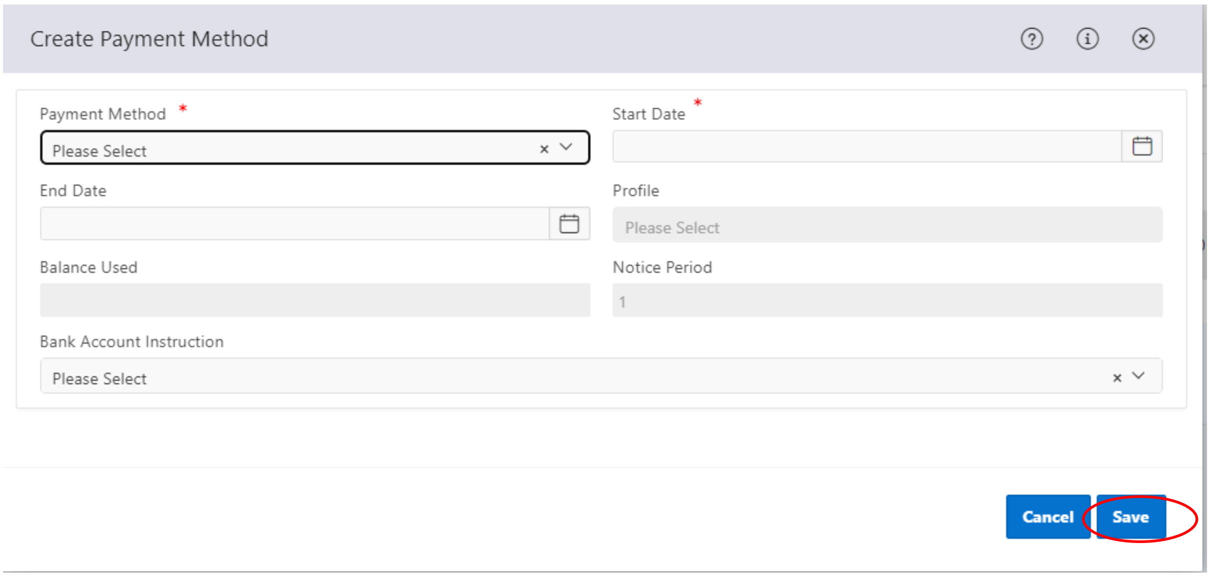
5.2 Payment Methods

5.2.1 Create a Payment Method

- In **'Revenue Accounts'**, search for the rent account using the search or advanced search options
- Select the account you would like to create the payment method for
- Click **'More'** and then **'Payment Methods'**
- Click **'Create'** and then **'Create Payment Method'**



- Complete the **'Create Payment Method'** wizard by using the drop-down menu to select the payment method and entering a start date



- Click **'Save'**

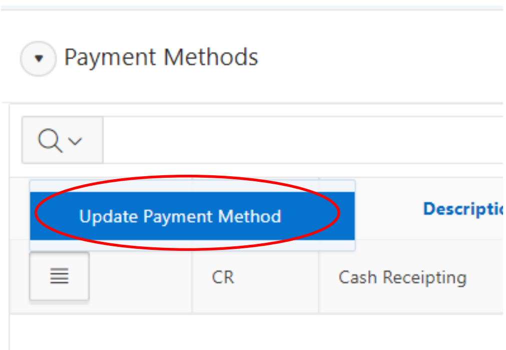
Note: A payment method should be assigned when the rent account is created.

Note: If the new payment method is a Direct Debit then a Direct Debit Instruction must be created in advance of creating a new payment method. This will be completed by the Systems Team when they set up the Direct Debit.

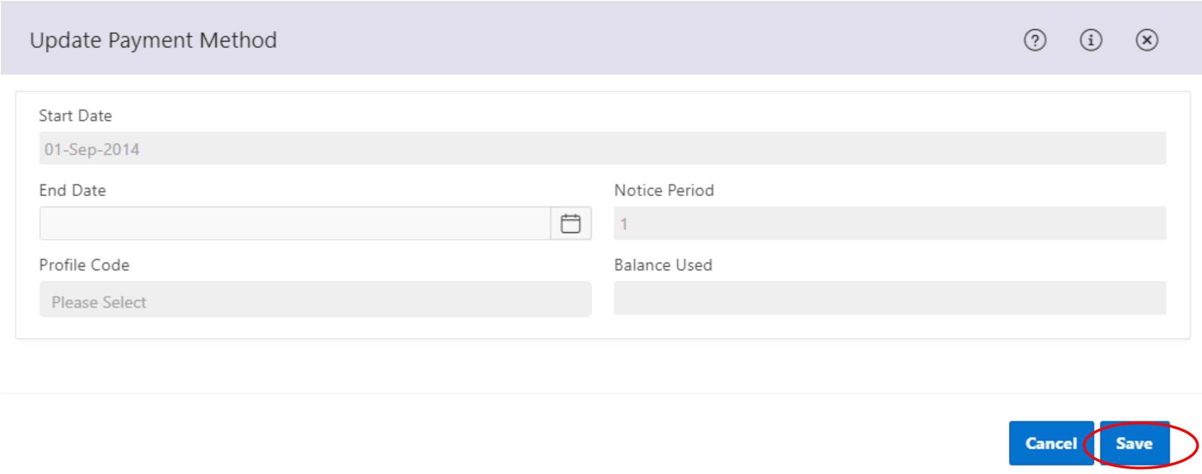
5.2.2 End a Payment Method

Note: If a payment method already exists then you will need to end the current payment method before you are able to create a new payment method.

- In **'Revenue Accounts'**, search for the rent account using the search or advanced search options
- Select the account you would like to update or end a payment method for
- Click **'More'** and then **'Payment Methods'**
- **'Row Action'** the active payment method and click 'Update Payment Method'



- Enter an end date in the **'Update Payment Method'** wizard.

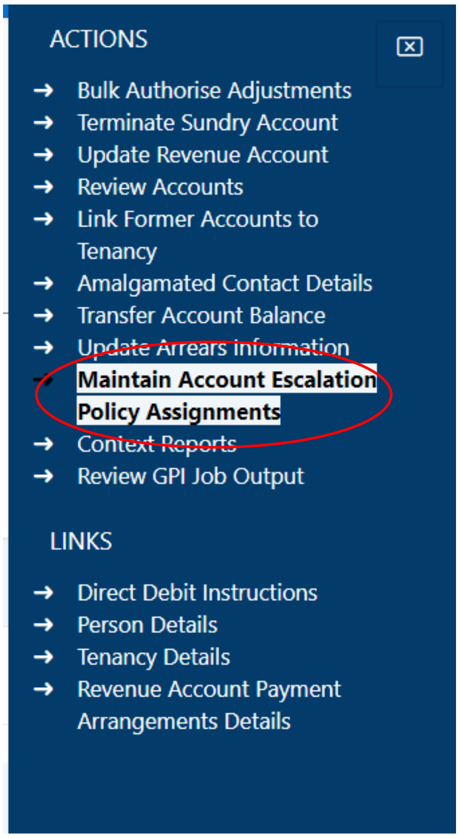


- Click **'Save'**
- Follow the instructions for creating a payment method to update the rent account to a new payment method.

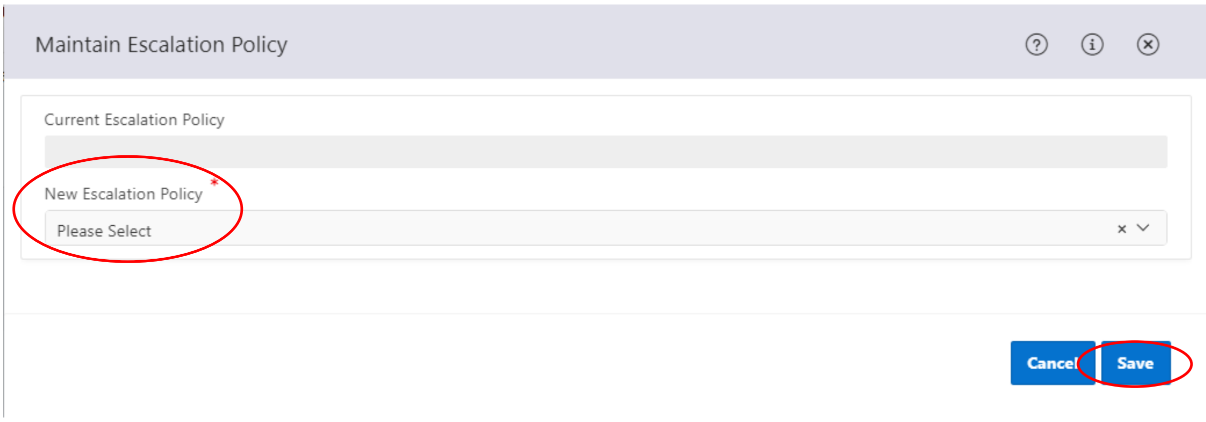
5.3 Escalations

5.3.1 Assigning an Escalation to an Account

- In **'Revenue Accounts'**, search for the rent account using the search or advanced search options
- Select the account you would like to create the escalation for
- Click **'Actions'** on the top right of the page
- Select **'Maintain Account Escalation Policy Assignments'**



- In the **'Maintain Escalation Policy'** select a new escalation in the drop down



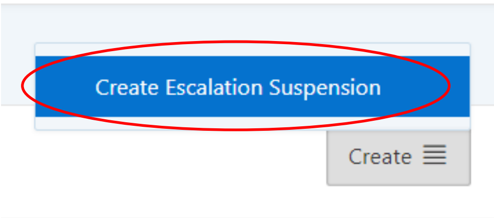
- Click **'Save'**

Note: The escalation will automatically switch depending on the payment method attached. If a housing benefit payment method is attached to the rent account the escalation will change to a weekly escalation. If a universal credit or direct debit payment method is attached to the rent account the escalation will change to a monthly escalation. Other payments will require the escalation to be updated manually.

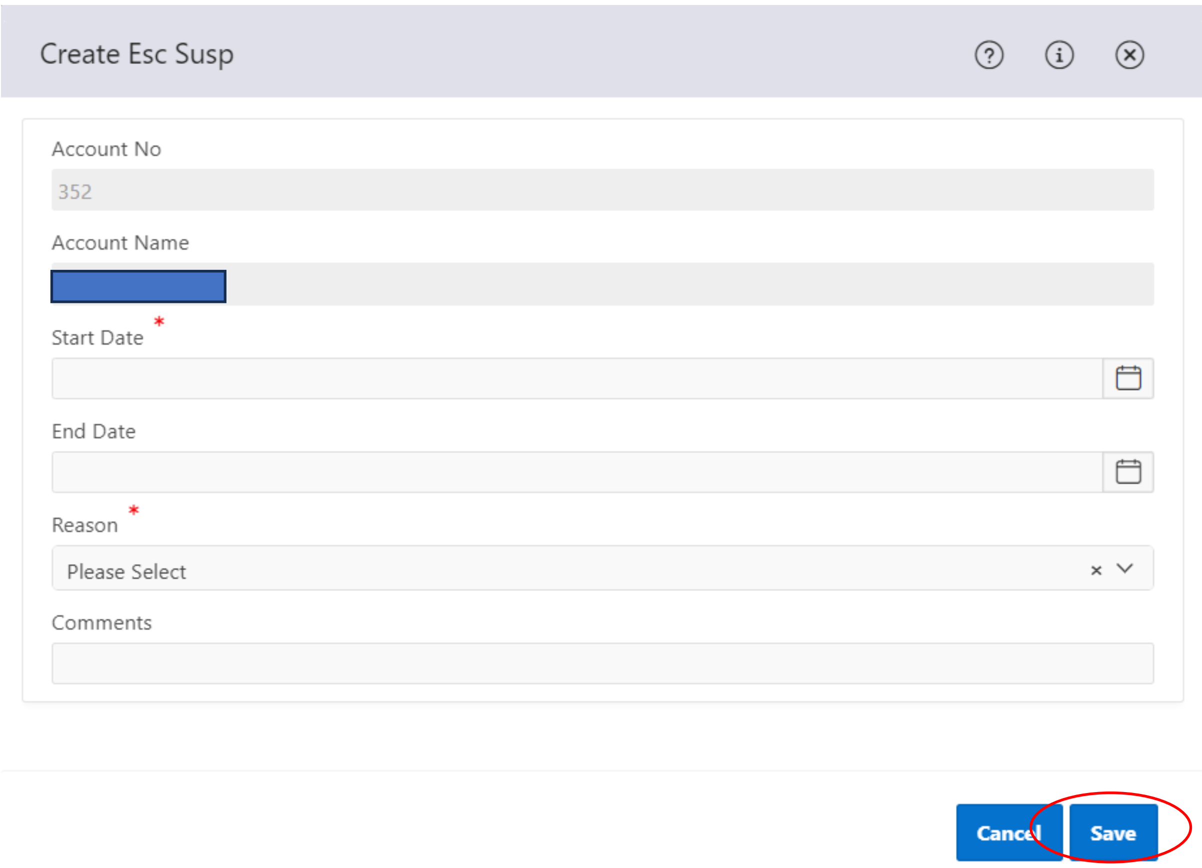
Note: A former escalation will only be found once the rent account is terminated.

5.3.2 Suspending an Escalation

- In **'Revenue Accounts'**, search for the rent account using the search or advanced search options
- Select the account you would like to put into suspension
- Click **'More'** and then **'Esc Susp'**
- Click **'Create'** and then **'Create Esc Susp'**



- Complete the **'Create Esc Susp'** wizard, ensuring to select a start and end date, as well as a reason for its suspension, adding in comments if required.

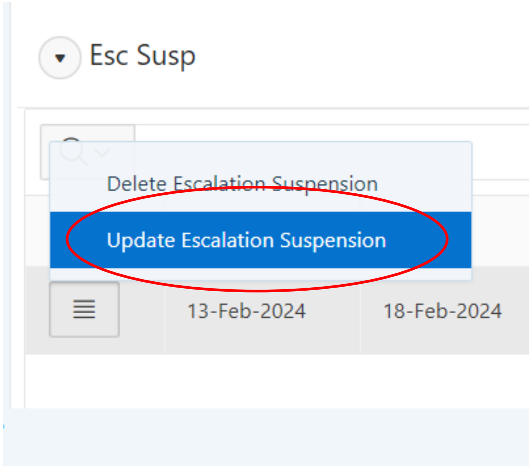


- Click **'Save'**

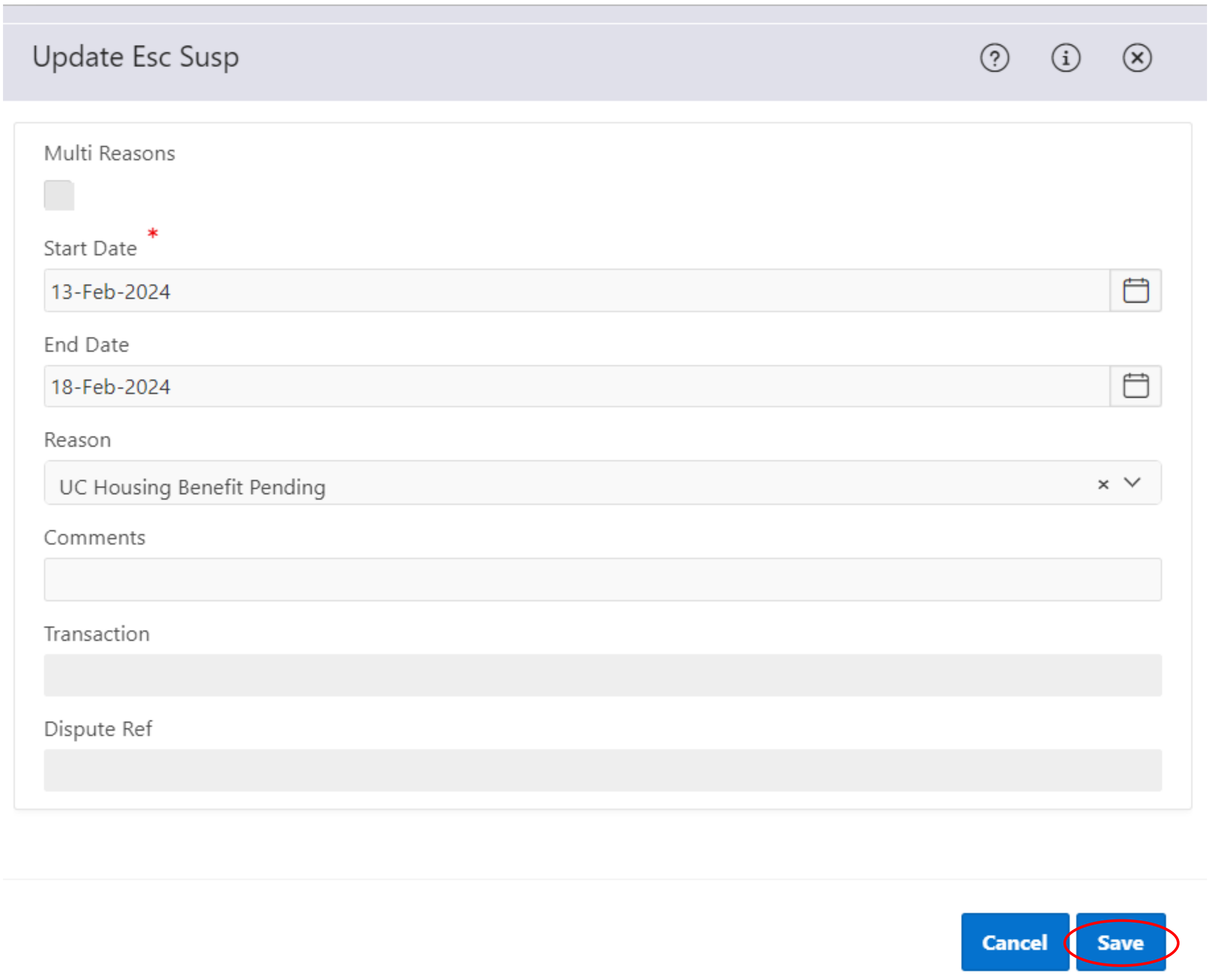
5.3.3 Updating or Ending an Escalation Suspension

- In **'Revenue Accounts'**, search for the rent account using the search or advanced search options

- Select the account you would like to put into suspension
- Click **'More'** and then **'Esc Susp'**
- **'Row Action'** and click **'Update Esc Susp'**



- Complete the **'Update Esc Susp'** wizard, ensuring to select a new end date if the suspension is being extended or updating the end date to reflect the day the escalation ended. Add any additional comments if required

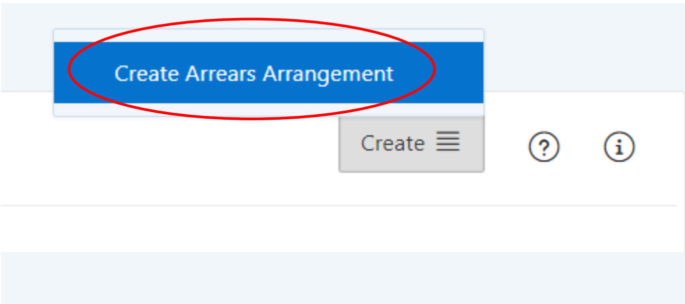


- Click **'Save'**

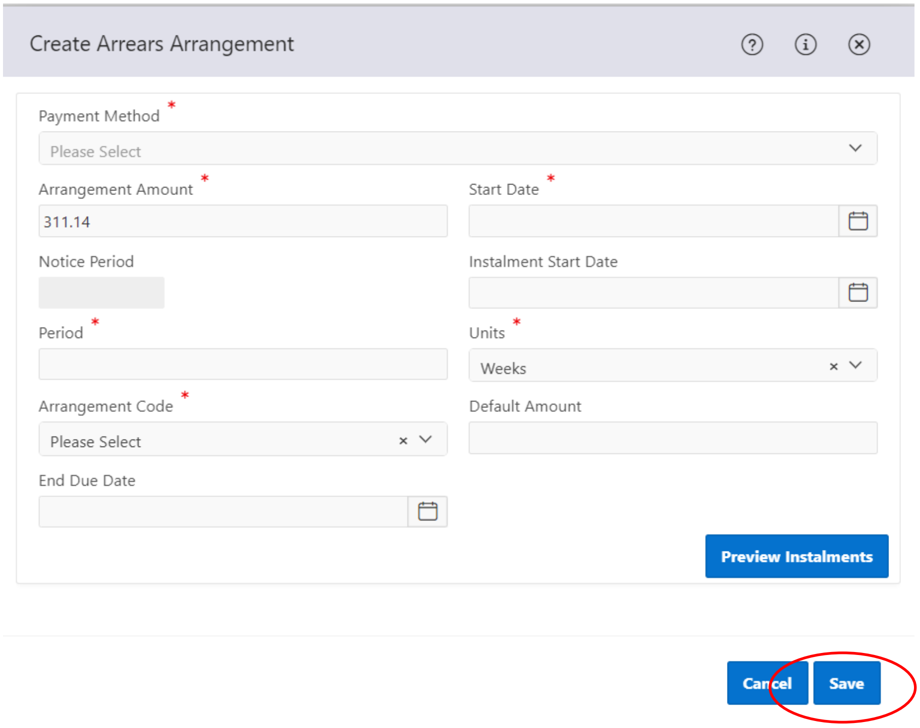
5.4 Arrangements

5.4.1 Setting Up and Editing Arrangements

- In **'Revenue Accounts'**, search for the rent account using the search or advanced search options
- Select the account you would like to set up the arrangement for
- Click **'More'** and then **'Arrangements'**
- Click **'Create'** and then **'Create Arrears Arrangement'**



- Complete the **'Create Arrears Arrangement'** wizard ensuring to complete the following
    - Payment method
    - Arrangement Amount – Total amount of arrears
    - Start Date – The day the agreement was made
    - Instalment Start Date – The day the first payment is due
    - Period
    - Units
    - Arrangement Code – The arrears action
    - Default Amount or End Due Date – If you use default amount this will be the set amount a tenant will pay, if you use end due date the system will calculate the amount due to clear the arrears by the due date

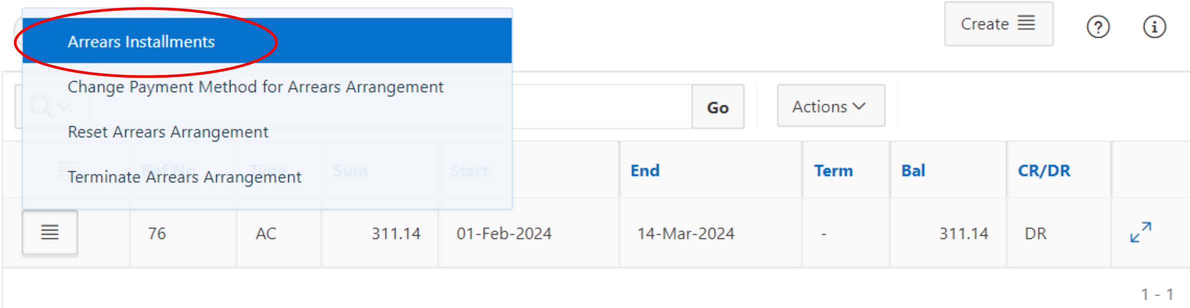


- Click **'Preview Instalments'**
- If you are happy with the instalments due click **'Save'** if not edit the arrears agreement above and then click **'Preview Instalments'** again until you are happy with this.

Note: The arrears arrangement only creates an arrangement for the arrears amount. Tenants are expected to continue paying the rent as agreed.
The arrears instalments created may have a larger final payment, this can be updated by following the guide for 'Updating the Arrears Instalments for an Arrears Arrangement'.

5.4.2 Viewing the Arrears Instalments of an Arrears Arrangement

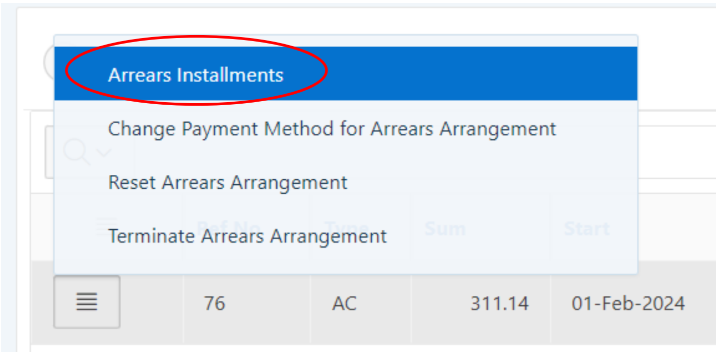
- In **'Revenue Accounts'**, search for the rent account using the search or advanced search options
- Select the account you would like to view the arrears instalment of
- Click **'More'** and then **'Arrangements'**
- **'Row Action'** the active arrangement and click **'Arrears Instalments'**



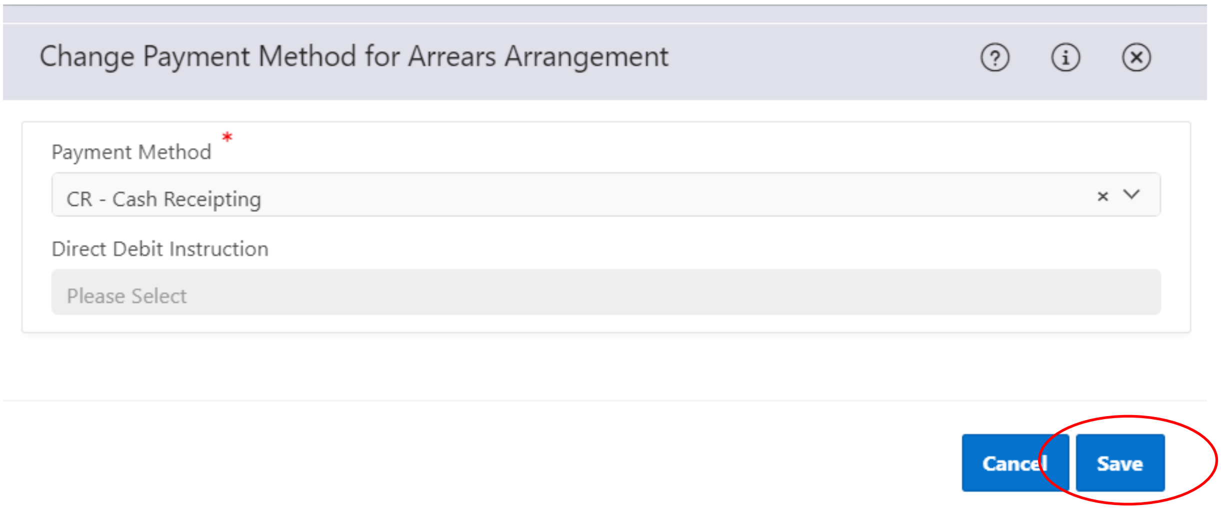
- This opens the **‘Arrangement Instalments Dataview’** where you can view the instalment information.

5.4.3 Updating the Payment Method for an Arrears Arrangement

- In **‘Revenue Accounts’**, search for the rent account using the search or advanced search options
- Select the account you would like to update the arrears arrangement payment method of
- Click **‘More’** and then **‘Arrangements’**
- **‘Row Action’** the active arrangement and click **‘Change Payment Method for Arrears Arrangement’**



- Complete the **‘Change Payment Method for Arrears Arrangement’** wizard

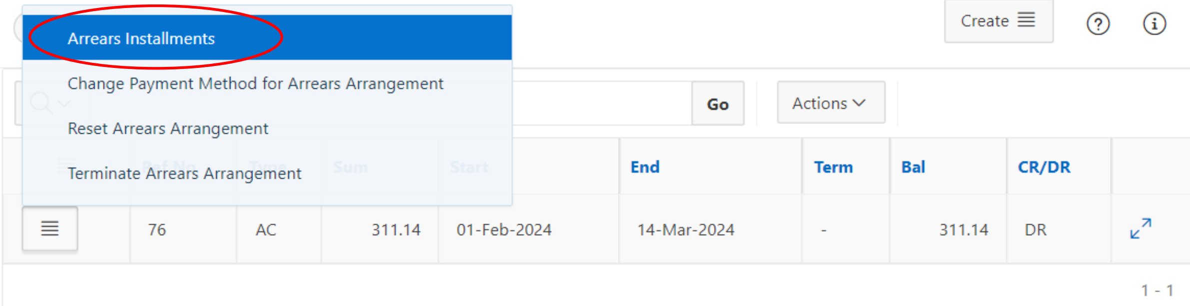


- Click **‘Save’**

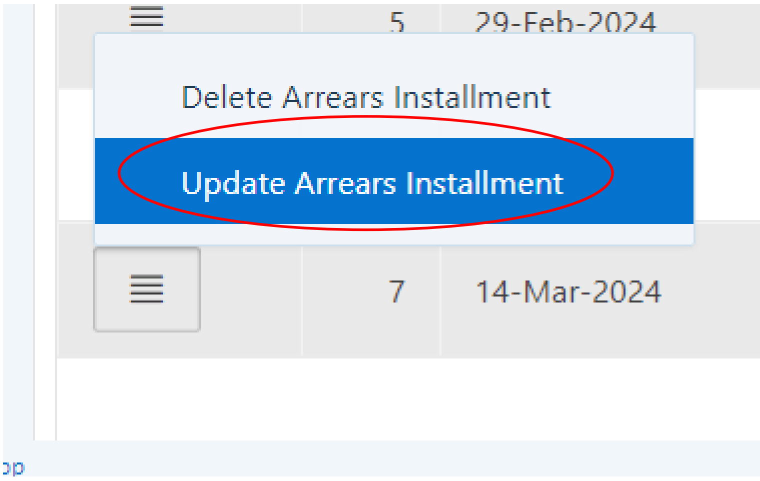
5.4.4 Updating the Arrears Instalments for an Arrears Arrangement

- In **‘Revenue Accounts’**, search for the rent account using the search or advanced search options
- Select the account you would like to update the arrears instalment for
- Click **‘More’** and then **‘Arrangements’**

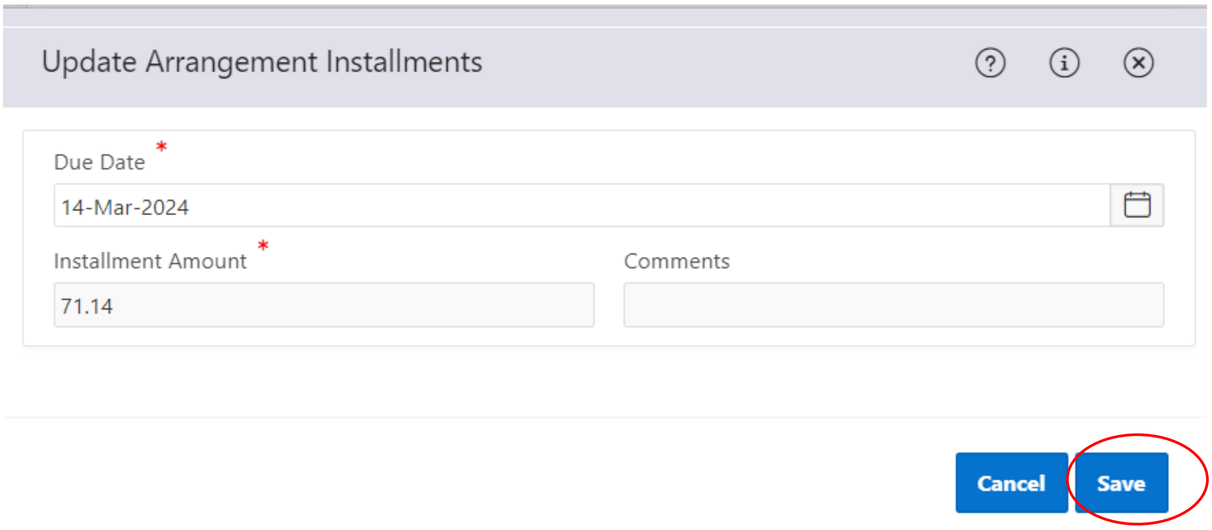
- **'Row Action'** the active arrangement and click **'Arrears Instalments'**



- This opens the **'Arrangement Instalments Dataview'** where you can view the instalment information.
- **'Row Action'** either a specific payment you want to update and click **'Update Arrears Instalment'**



- Complete the **'Update Arrangements Instalments'** wizard

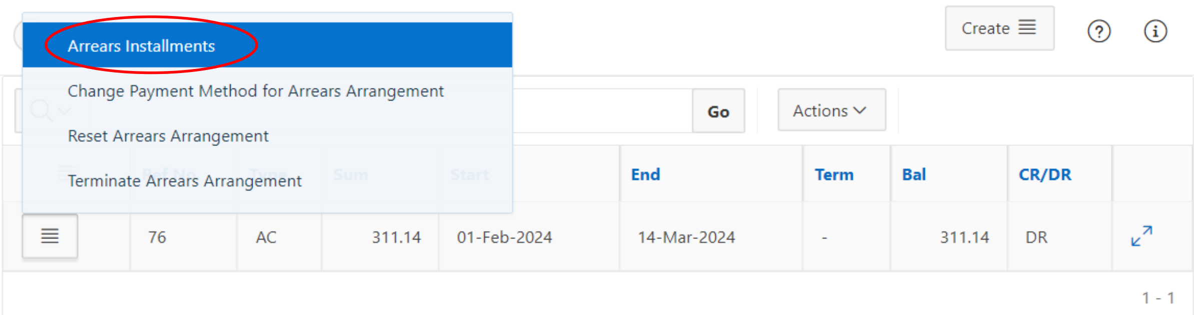


- Click **'Save'**

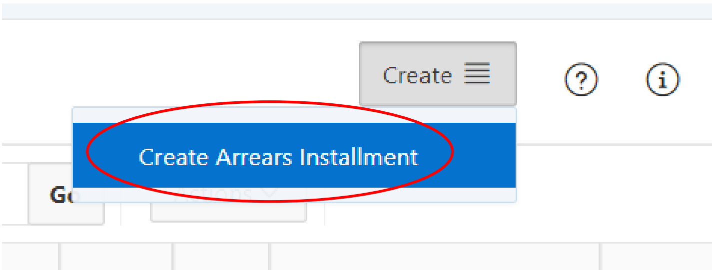
Note: The arrears instalment automatically recalculates the rest of the payments due to clear the arrears amount.

5.4.5 Creating an Arrears Instalment for an Arrears Arrangement

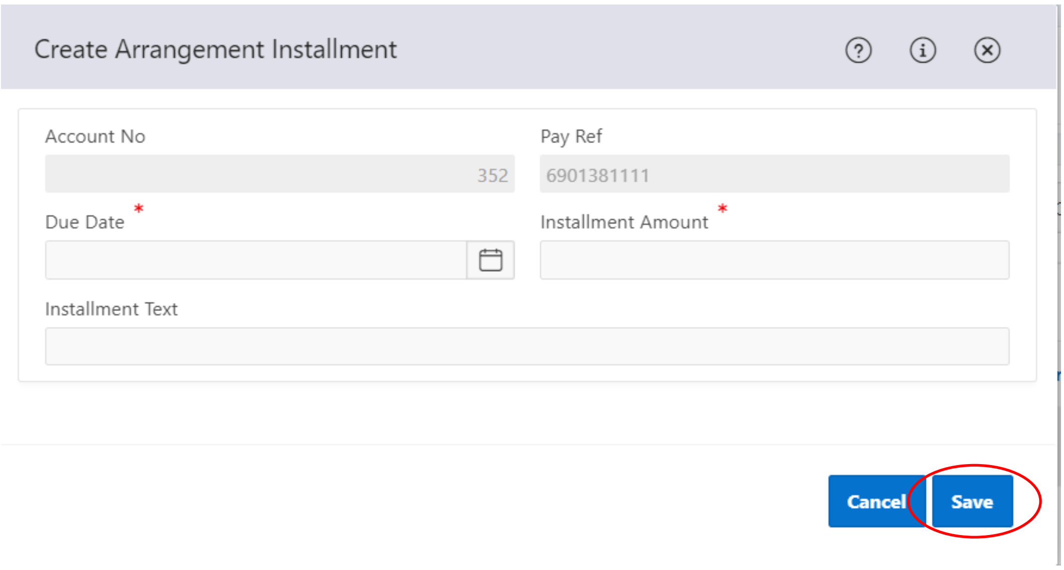
- In **'Revenue Accounts'**, search for the rent account using the search or advanced search options
- Select the account you would like to create the arrears instalments for
- Click **'More'** and then **'Arrangements'**
- **'Row Action'** the active arrangement and click **'Arrears Instalments'**



- This opens the **'Arrangement Instalments Dataview'** where you can view the instalment information.
- Click **'Create'** and then **'Create Arrears Instalment'**



- Complete the **'Create Arrangement Instalment'** wizard

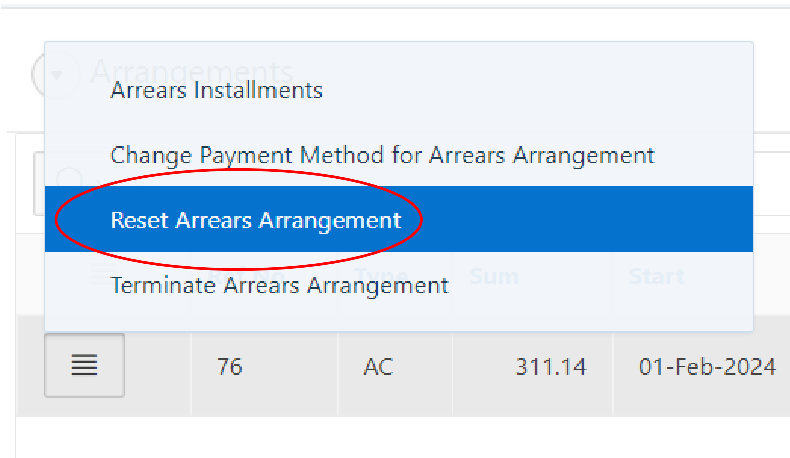


- Click **‘Save’**

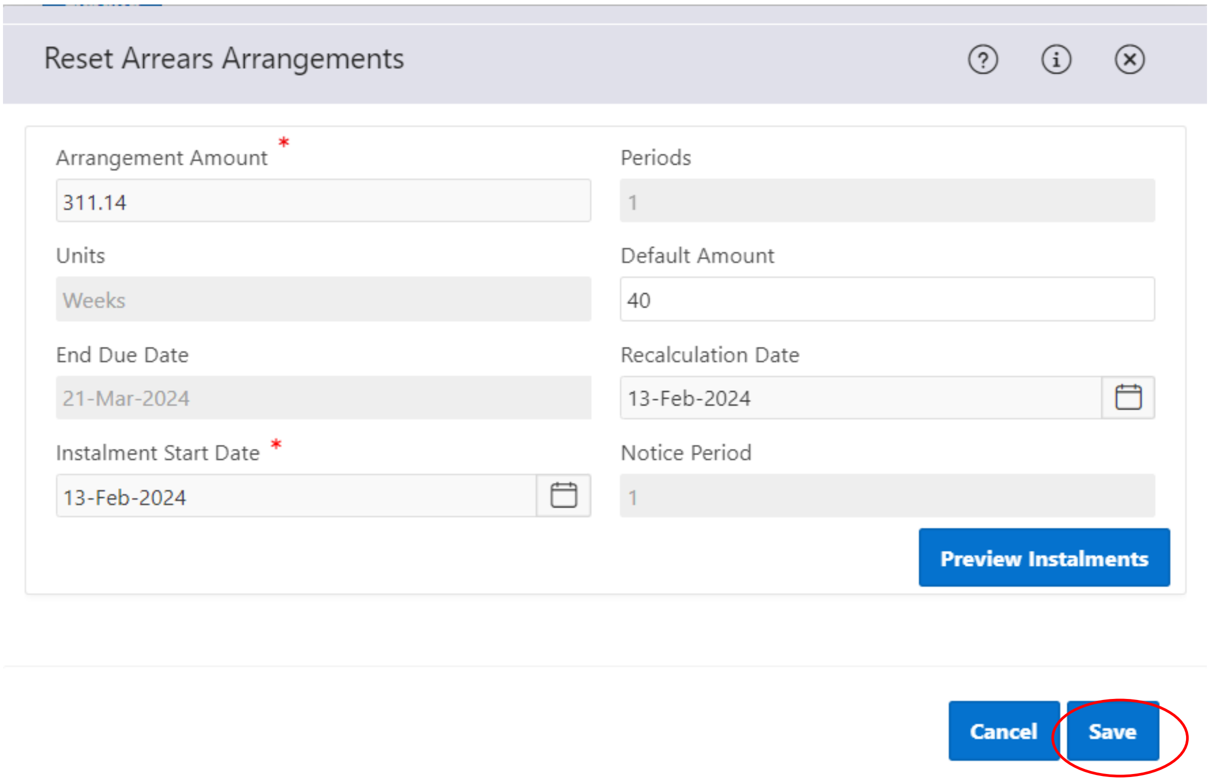
Note: This can be used to add in additional payments the tenant has agreed to pay out with the weekly arrangement.
The arrears instalment automatically recalculates the rest of the payments due to clear the arrears amount.

5.4.6 Resetting Arrangements

- In **‘Revenue Accounts’**, search for the rent account using the search or advanced search options
- Select the account you would like to reset the arrears arrangement for
- Click **‘More’** and then **‘Arrangements’**
- **‘Row Action’** the active arrangement and click **‘Reset Arrears Arrangement’**



- Complete the **‘Reset Arrears Arrangement’** wizard which is very similar to the **‘Create Arrears Arrangement’** wizard.

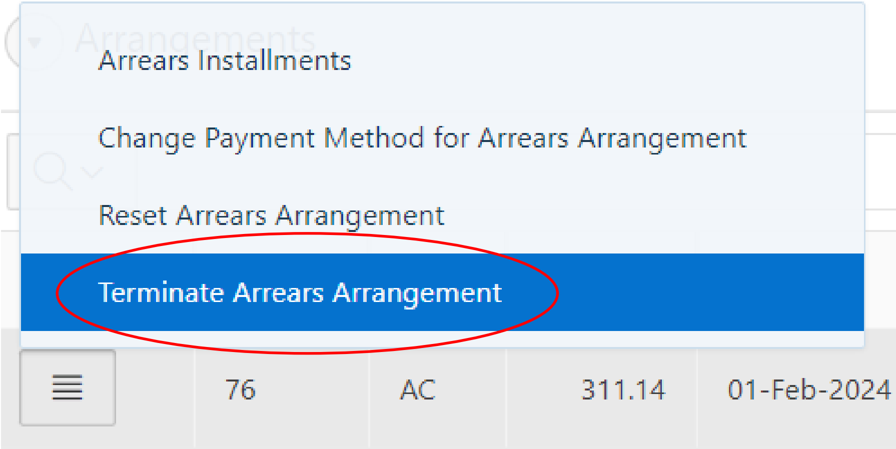


- Click **'Save'**

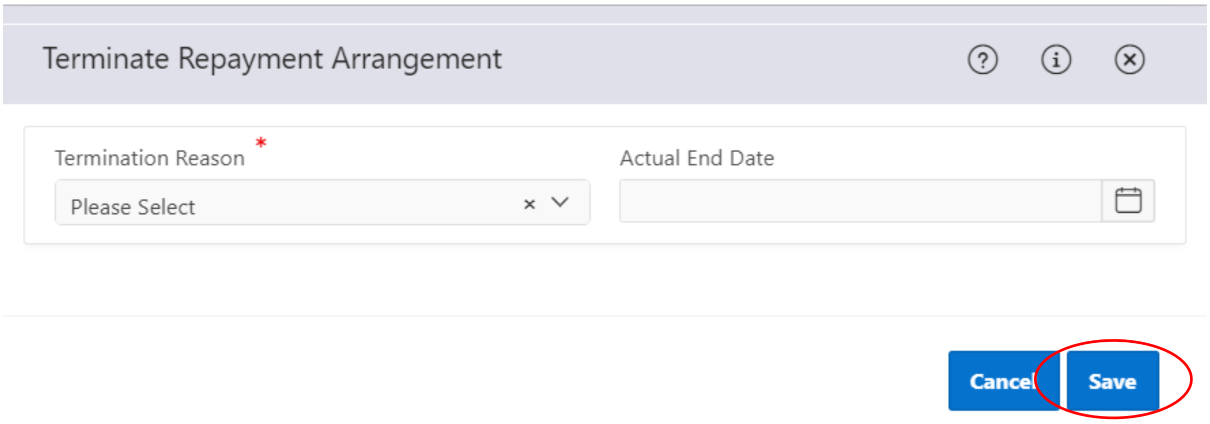
Note: This can be used to increase the arrears amount or change the default amount the tenant will pay. This cannot be used to change the frequency of the arrear's payments; a new arrangement would need to be completed for this.

5.4.7 Ending Arrangements

- In **'Revenue Accounts'**, search for the rent account using the search or advanced search options
- Select the account you would like to end the arrears arrangement for
- Click **'More'** and then **'Arrangements'**
- **'Row Action'** the active arrangement and click **'Terminate Arrears Arrangement'**



- Complete the **'Terminate Repayment Arrangement'** wizard



- Click **'Save'**

5.5 Arrears Actions

Master Arrears Status

This shows the current level of escalation that the account has reached e.g. Pre-legal, Reminder, and Eviction.

Escalation Policy

A series of actions on a path that can be generated against an account in arrears under specific circumstances.

Semi-Automatic Action

An action generated with a status of **'Pending'** as a result of an escalation policy.

Log Date The date the action was created.

Status Date The date the current status e.g. AUTH, was awarded.

Effective Date The date the action is effective for e.g. Court Date Received; the Effective Date would be the date set for the actual court hearing NOT the date the action was logged/authorised.

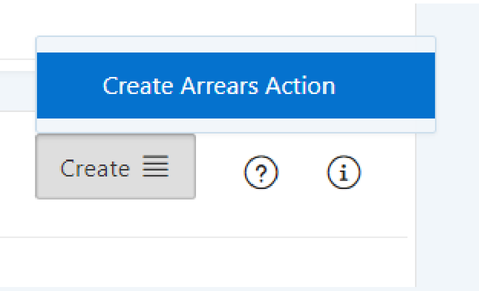
Note: Your Job Role controls the ability to authorise/delete arrears actions. Only actions with associated printed output will show as printed.

5.5.1 View Arrears Actions

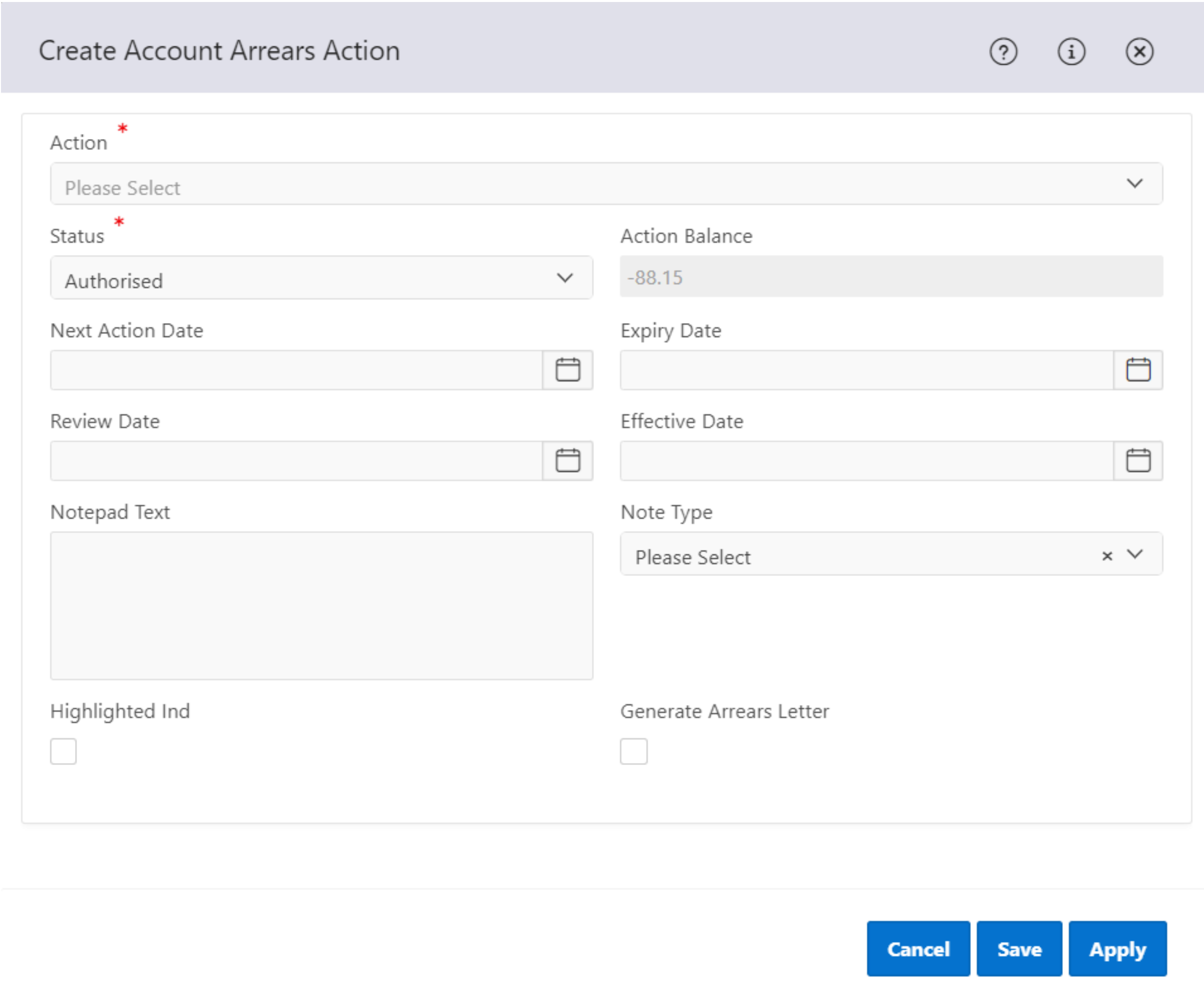
- In **'Revenue Accounts'**, search for the rent account using the search or advanced search options
- Select the account you would like to update
- Click **'More'** and select **'Arrears Actions'**
- This opens the **'Arrears Actions'** page where you can view all arrears actions.

5.5.2 Creating Arrears Actions

- In **'Revenue Accounts'**, search for the rent account using the search or advanced search options
- Select the account you would like to create the arrears action for
- Click **'More'** and then **'Arrears Actions'**
- Click **'Create'** and then **'Create Arrears Action'**



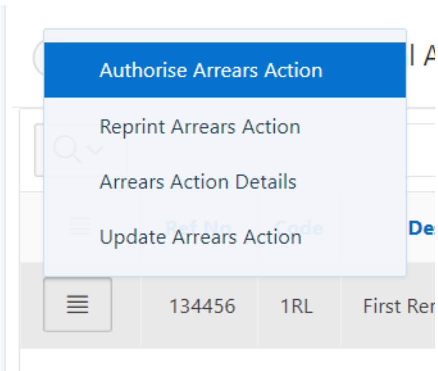
- Complete the **'Create Account Arrears Action'** wizard by selecting the arrears actions, putting the status to authorised, entering the note and entering a review date if necessary.



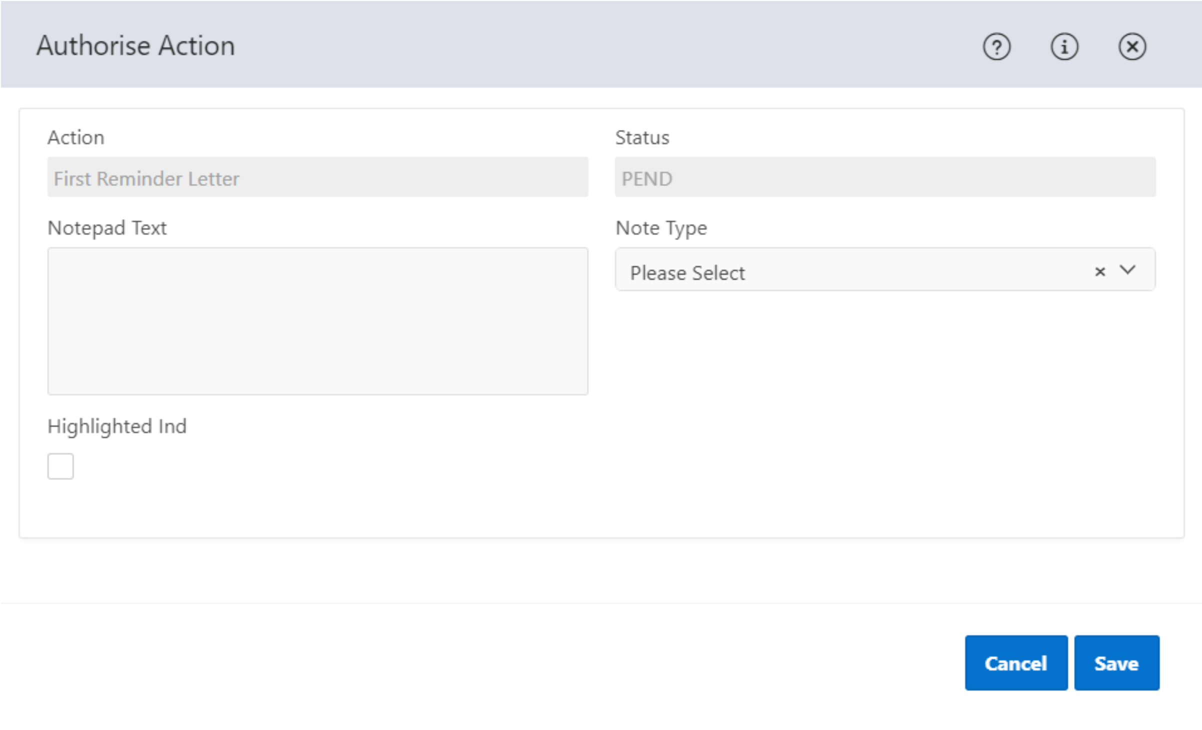
- Click **'Save'**

5.5.3 Authorising an Arrears Actions

- In **'Revenue Accounts'**, search for the rent account using the search or advanced search options
- Select the account you would like to authorise the arrears action for
- Click **'More'** and then **'Arrears Actions'**
- **'Row Action'** the arrears action you want to authorise and click **'Authorise Arrears Action'**



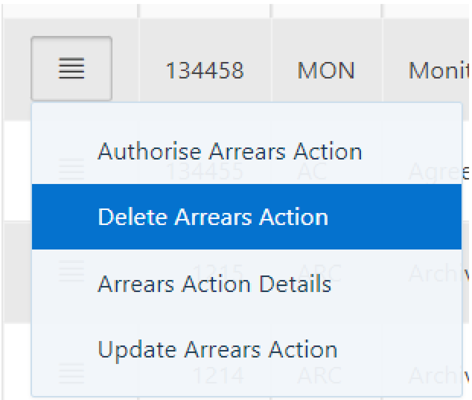
- Complete the **'Authorise Action'** wizard, ensuring to add additional notes if required.



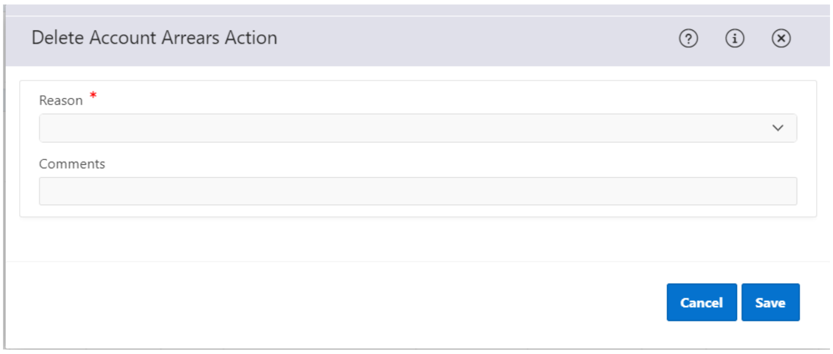
Click **'Save'**

5.5.4 Declining an Arrears Actions

- In **'Revenue Accounts'**, search for the rent account using the search or advanced search options
- Select the account you would like to authorise the arrears action for
- Click **'More'** and then **'Arrears Actions'**
- **'Row Action'** the arrears action you want to authorise and click '



- Complete the **'Delete Arrears Action'** wizard, ensuring to add a reason and note.

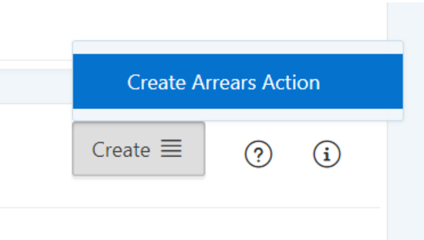


Click **‘Save’**

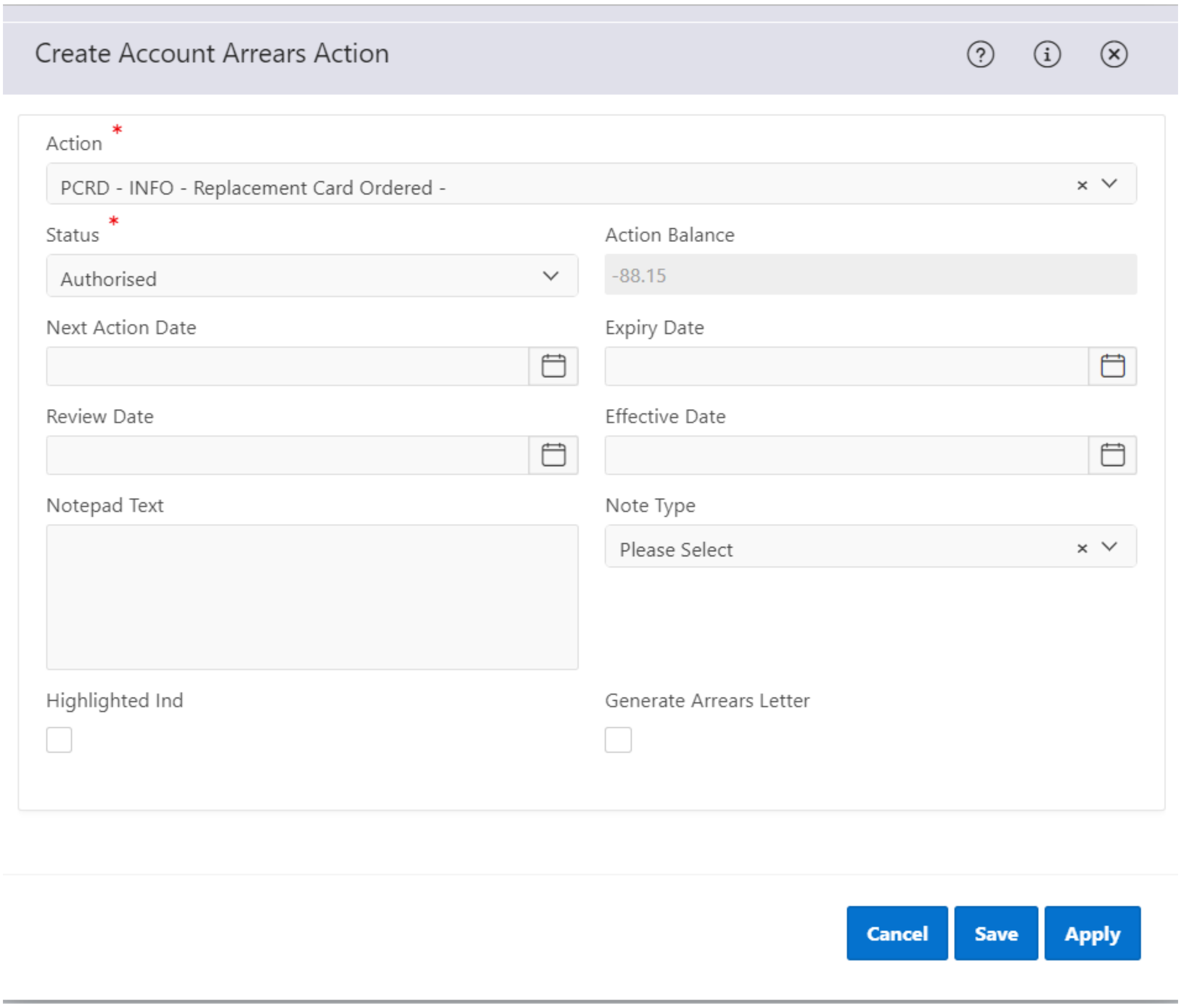
5.5.5 Ordering a New Rent Card

- In **‘Revenue Accounts’**, search for the rent account using the search or advanced search options
- Select the account you would like to order the new rent card for

- Click **‘More’** and then **‘Arrears Actions’**
- Click **‘Create’** and then **‘Create Arrears Action’**



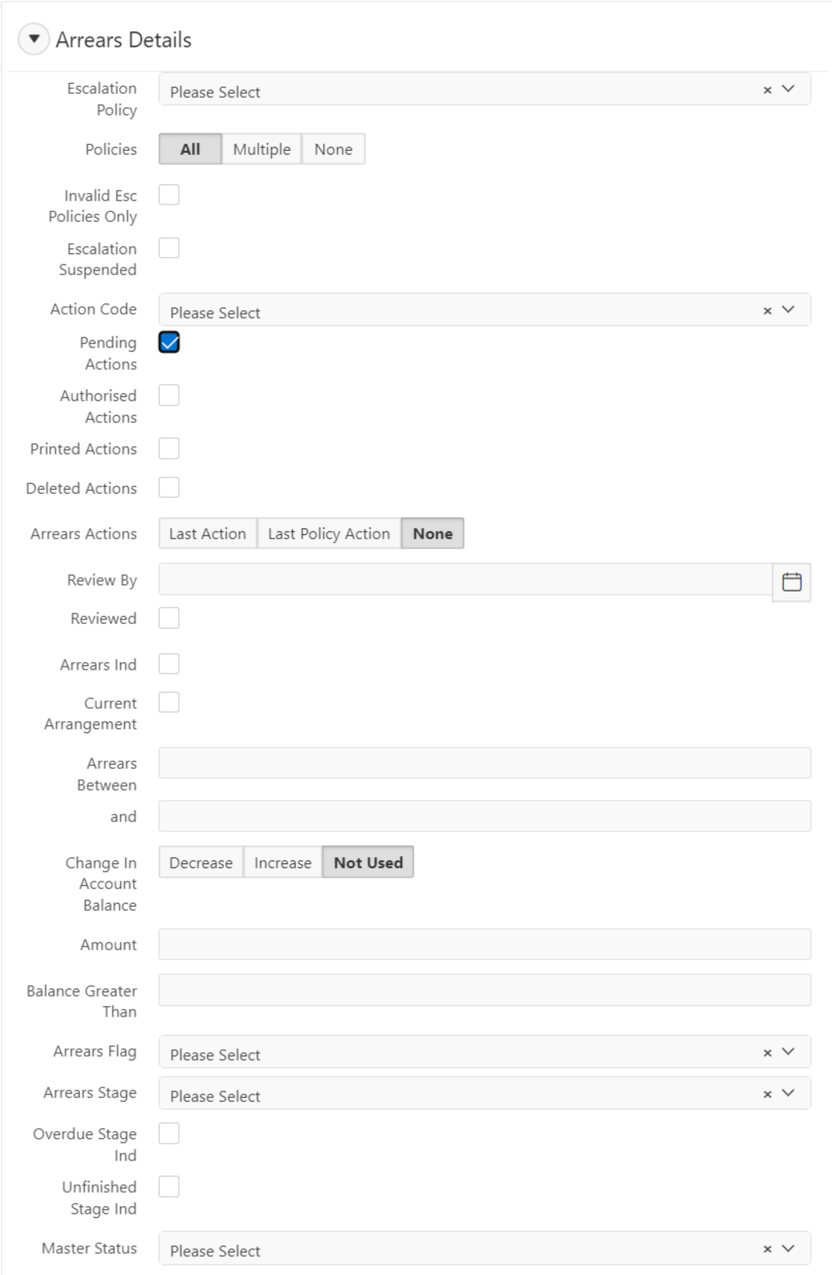
- Complete the **‘Create Arrears Action’** wizard by selecting **‘PCRD – INFO – Replacement Card Ordered’**, put the status as **‘Pending’** and add some text to the **‘Notepad Text’**



- Click **‘Save’**

5.5.6 Searching for Pending Arrears Action

- Using the **‘Advance Search’** guide open the **‘Arrears Details’** in the advanced search
- Tick the box for **‘Pending Actions’** and enter any other search requirements

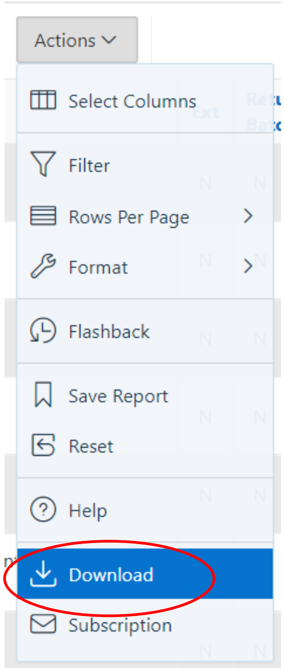


- Click **'Search'**
- This returns all the accounts with pending actions against them

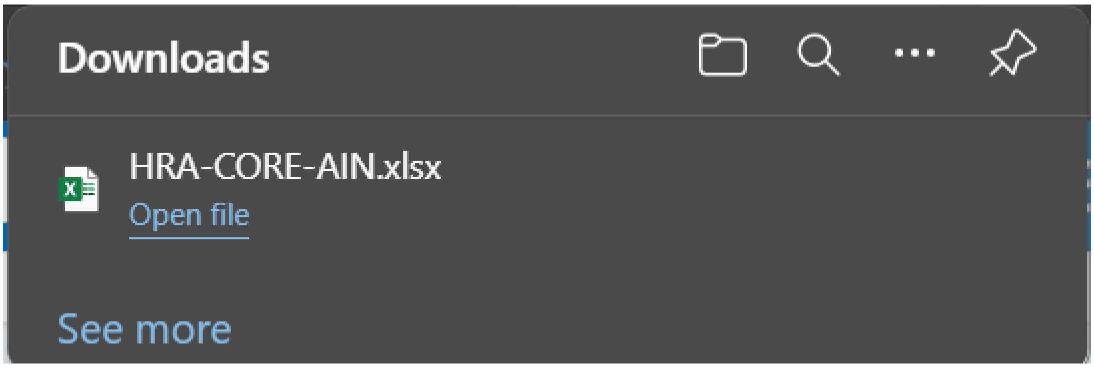
5.5.7 Print All Arrears Actions and Notes

- In **'Revenue Accounts'**, search for the rent account using the search or advanced search options
- Select the account you would like to update
- Click **'More'** and select **'Amalgamated Notepad'** or **'View Notepads'**

- Click **'Actions'** and then **'Download'**



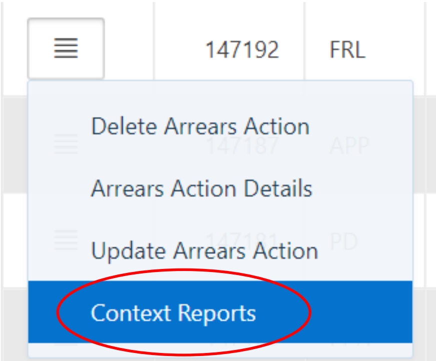
- Select **'Excel'** or **'PDF'** and click **'Download'**
- This downloads the file locally to your computer to be printed as normal



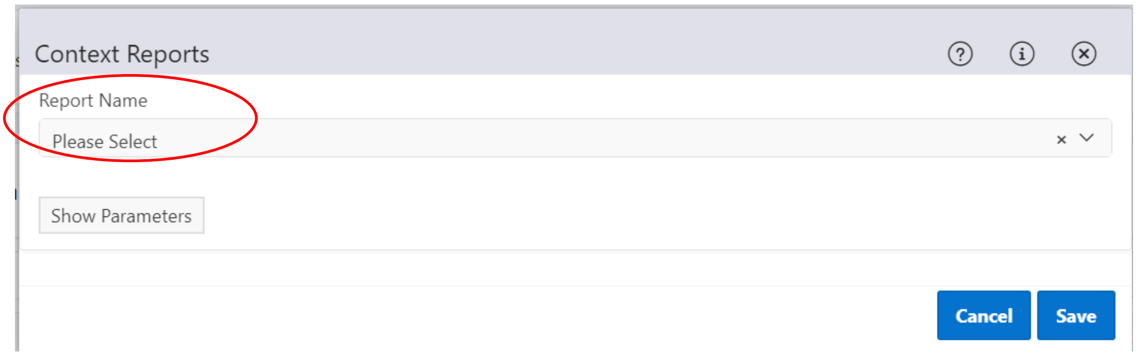
5.6 Letters & Statements

5.6.1 Sending a Rent Letter to Print

- Follow the guide for **'Creating Arrears Actions'** or **'Authorising Arrears Actions'**
- Once you have authorised the arrears action **'Row Action'** the arrears action and select **'Context Report'**

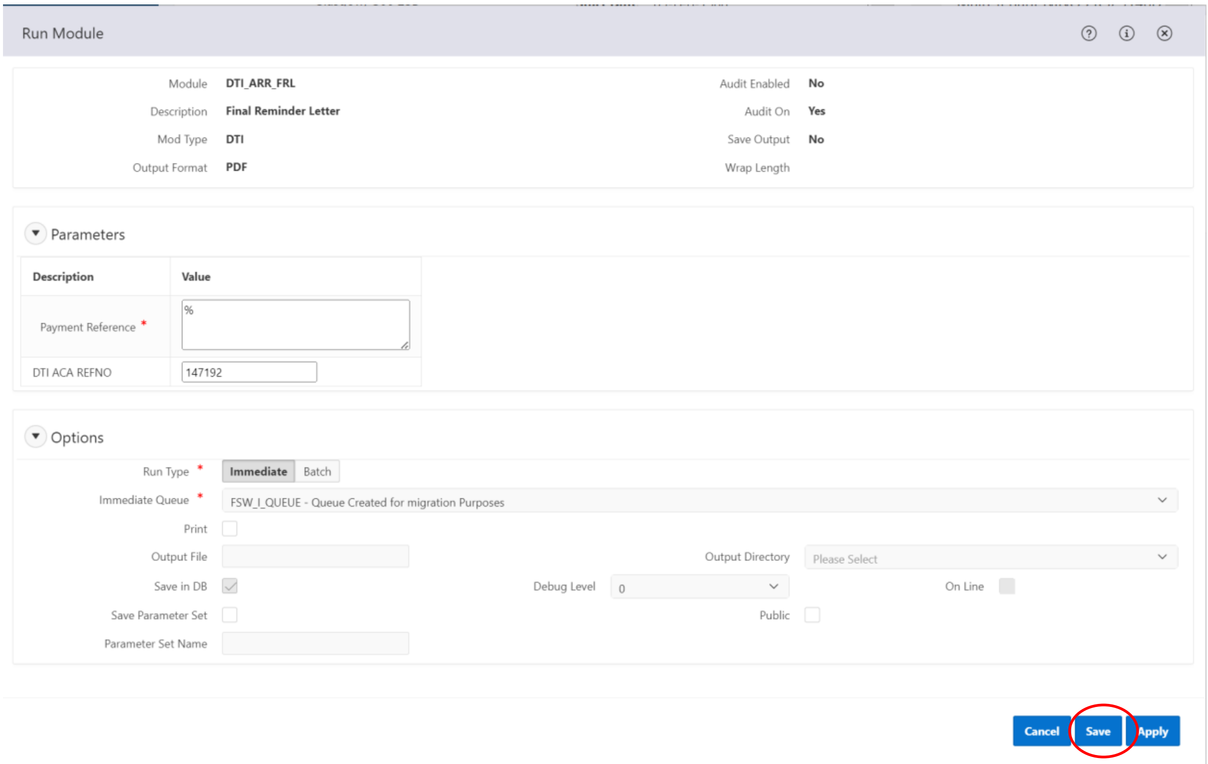


- Select the letter which matches your arrears action

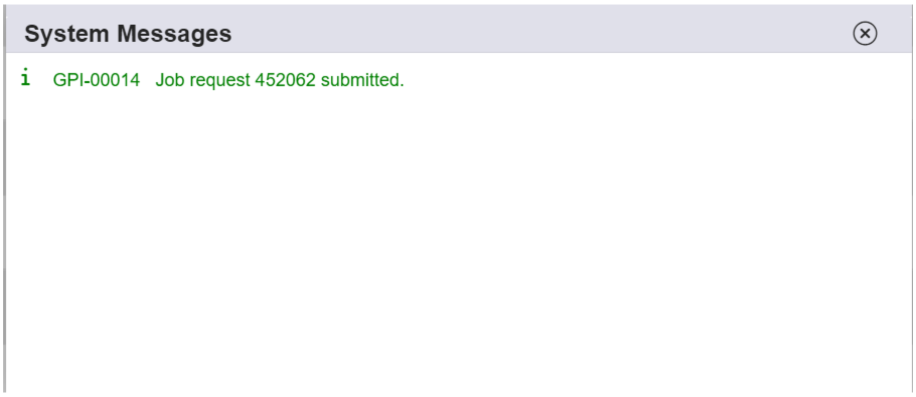


- Select **‘Parameters’** and click **‘Save’**

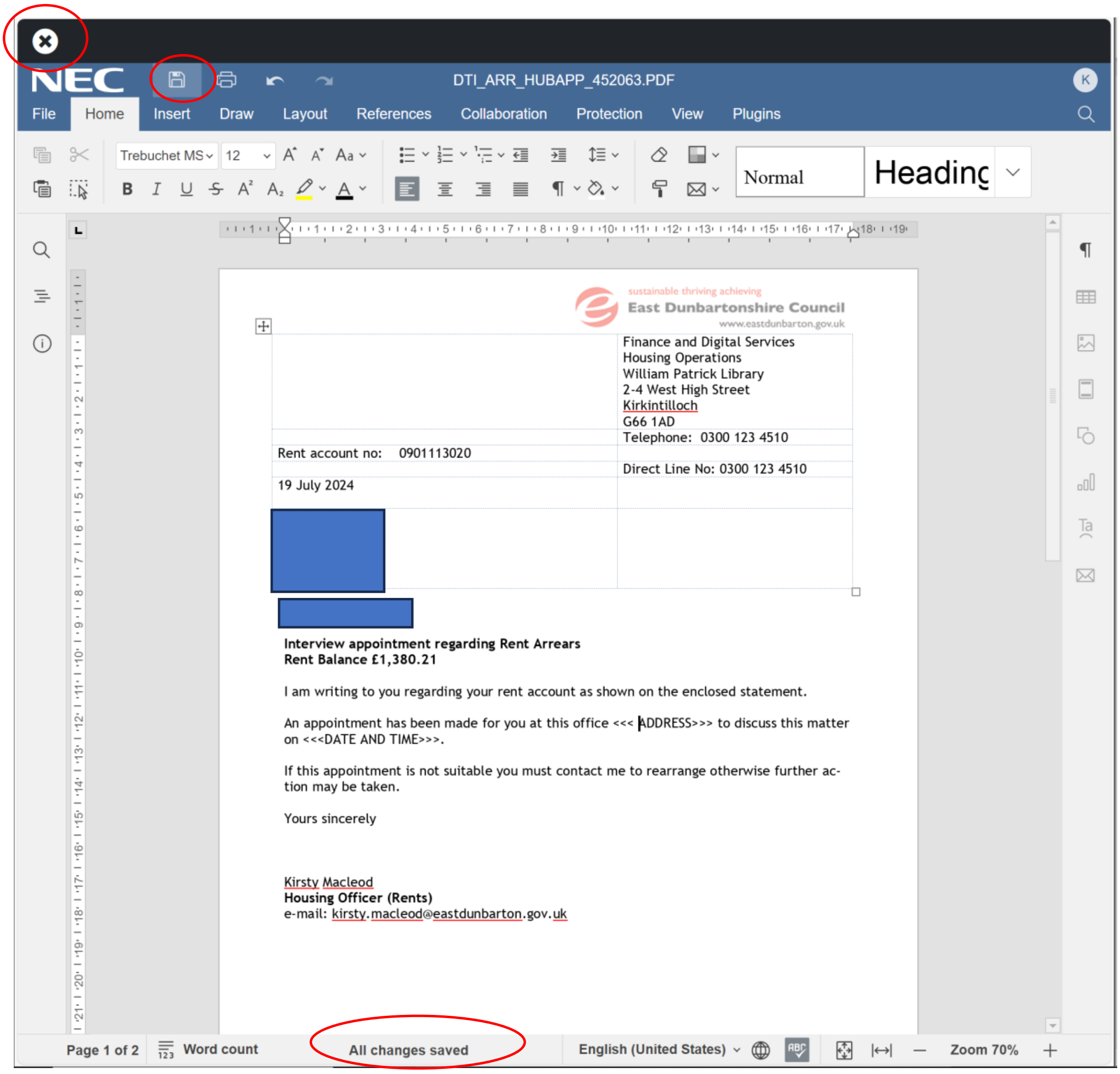
- This opens the **‘Run Module’** wizard. Enter any required information in the **‘Parameters’** and click **‘Save’**



- If there is no other action required you should receive a system message advising the job was requested.



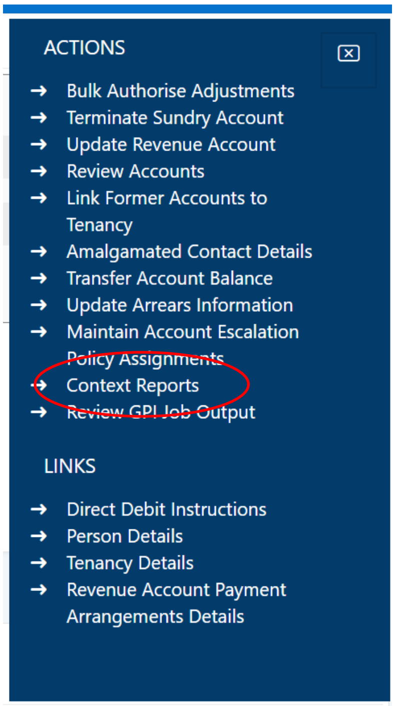
- If the letter has online edit activated the **'DocEditor'** will open up on a new tab to allow you to edit the letter and enter any details required. Once happy click the **'Save'** icon, wait for the letter to show it has saved at the bottom and the close the online edit via the top left-hand corner **'X'**



- This will then prompt a **'Editing complete. Do you wish to continue'** wizard, click **'Ok'**
- A new tab will open which shows the letter after being sent to print. You can use this to check your changes have saved and then close the tab as normal.

5.6.2 Sending a Rent Statement or Court Letter to Print

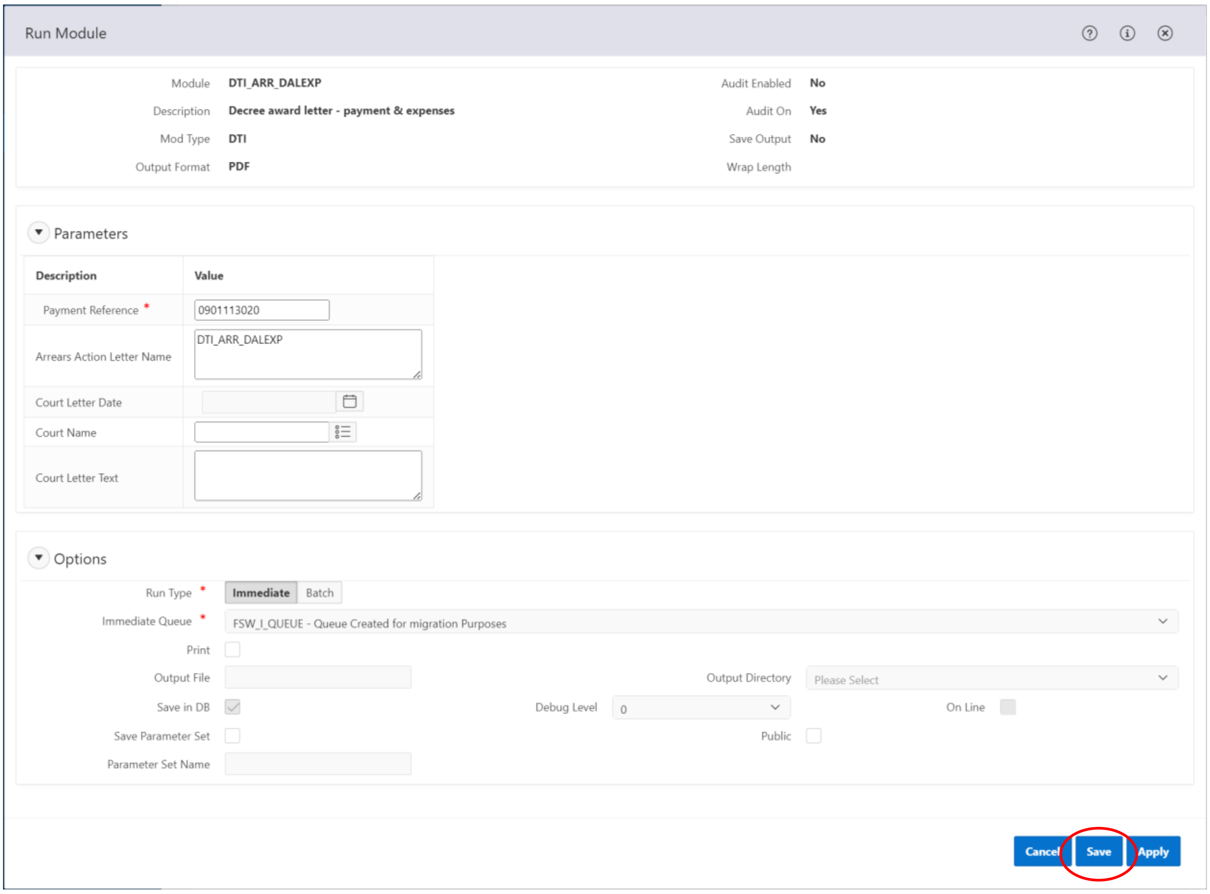
- Follow the guide for **'Creating Arrears Actions'** or **'Authorising Arrears Actions'**
- Click **'Actions'** on the top right-hand corner and then **'Context Reports'**



- Complete the **‘Context Reports’** wizard by selecting the letter you want to send

- Select **‘Parameters’** and then click **‘Save’**

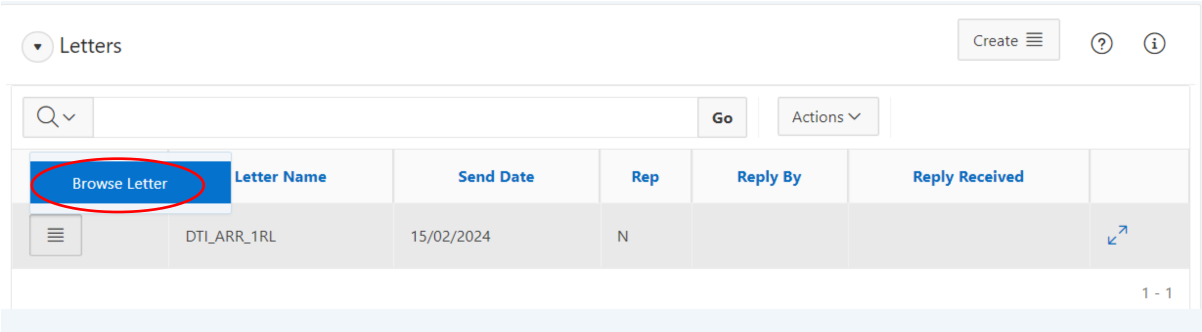
- Enter any required information in the **‘Parameters’** which vary depending on the court letter being produced.



- Click **'Save'** and you should receive a system message advising the job was requested.

5.6.3 Viewing Printed Letters

- In **'Revenue Accounts'**, search for the rent account using the search or advanced search options
- Select the account whose letters you want to view
- Click **'More'** and then **'Letters'**
- This page allows you to view any letters that have been sent. If you need more detail on the letter contents **'Row Action'** the letter and select **'Browse Letter'**

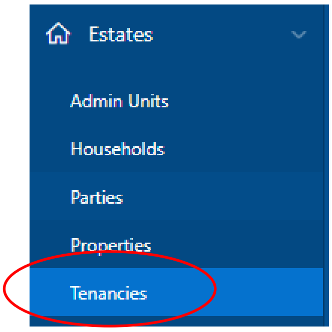


- This opens the NEC Document Viewer where you can view, reprint or download the letter if required.

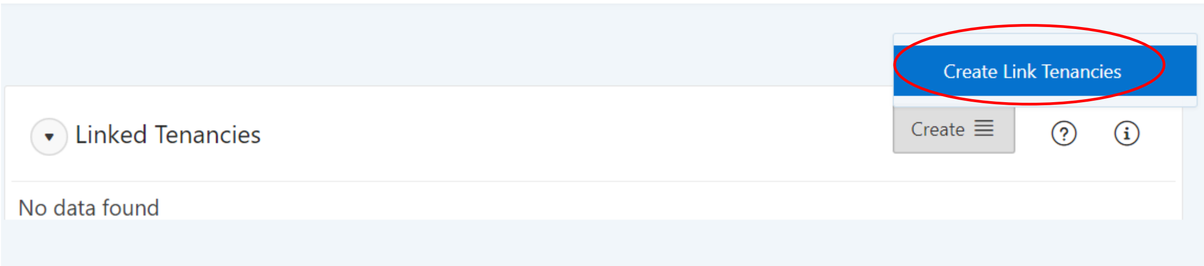
6. Tenancy Management

6.1 Linking Current Tenancies

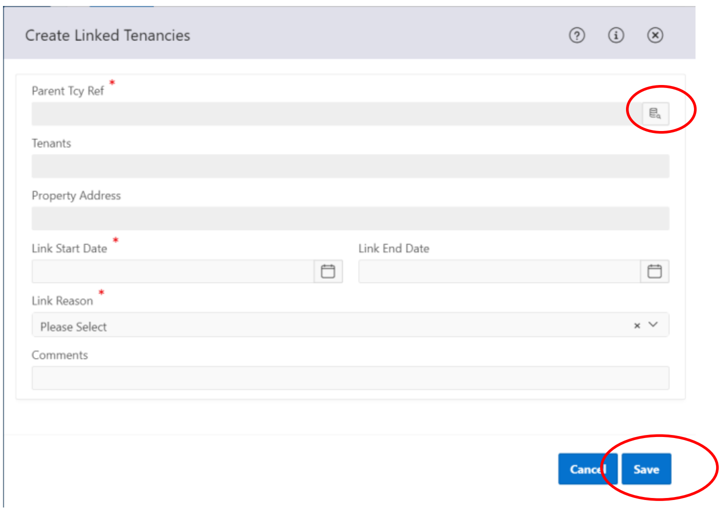
- In **‘Tenancies’** search for a record using the search or advanced search options



- Select the lock up, garage ground site or decant tenancy you want to link
- Click **‘More’** and then **‘Linked Tenancies’**
- Click **‘Create’** and then **‘Create Link Tenancies’**



- Complete the **‘Create Linked Tenancies’** wizard remembering to ensure the **‘Parent Tcy Ref’** is the main tenancy, you’ve provided a start date and a linking reason.



- Click **‘Save’**

Note: Rules for linking:

- The tenant must have at least one Terminated Tenancy with an associated account and one Current Tenancy with a current account.

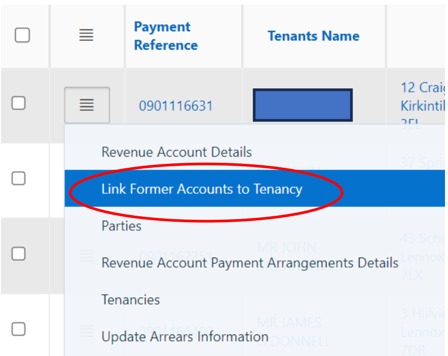
- You can link any account types to the Current Tenancy e.g. Rent Account, Court Costs, Rechargeable Account, Insurance Account.

- Linking will NOT transfer account balances automatically however balance transfers from former to current accounts can be applied later.

- Non-Tenant Sundry Accounts cannot be linked.

6.2 Linking Former Accounts to Tenancies

- In **'Revenue Accounts'** search for a record using the search or advanced search options
- Select the former account you want to link
- **'Row Action'** and the click **'Link Former Accounts to Tenancies'**

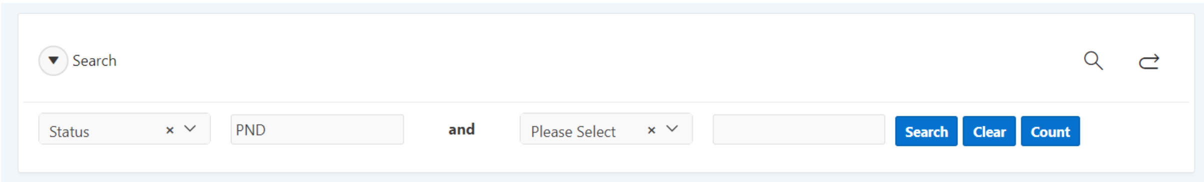


- Complete the **'Link Former Accounts to Tenancy'** wizard with all the relevant data.
- Click **'Save'**

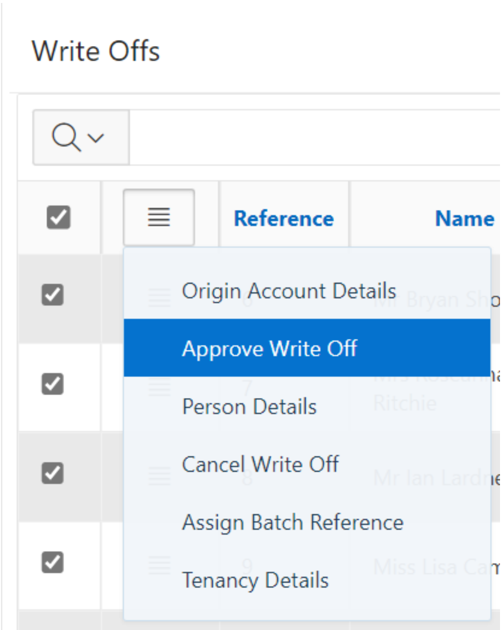
7. Write Off

7. Authorising Write Offs

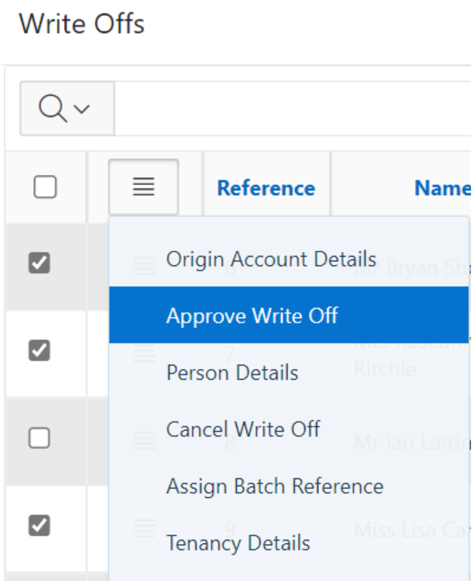
- In **'Write Offs'** under **'Revenue Accounts'** search for all pending write offs by selecting **'Status'** for the search criteria and searching for **'PND'**



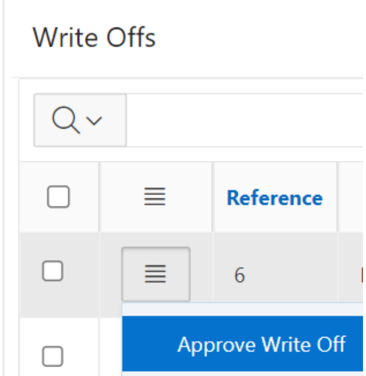
- If authorising all write offs that have appeared in the search criteria tick the box in the header to select all results and then click the **'Bulk Row Action'** and then **'Approve Write Off'**



- If authorising only some of the pending write offs that have appeared in the search criteria tick the box of all cases due to be written off and then click the **'Bulk Row Action'** and then **'Approve Write Off'**



- If only authorising individual cases **'Row Action'** on the account to be written off and select **'Approve Write Off'**



- Complete the **'Approve Write Off'** wizard by ensuring the details on this match the write off approval paperwork. Once happy click **'Save'**.

Note: If any changes are required to the write off's contact the systems team. Once the write offs have been authorised inform the systems team who need to forward the details of the write offs to finance for reconciliation.

8. Pre-Tenancy

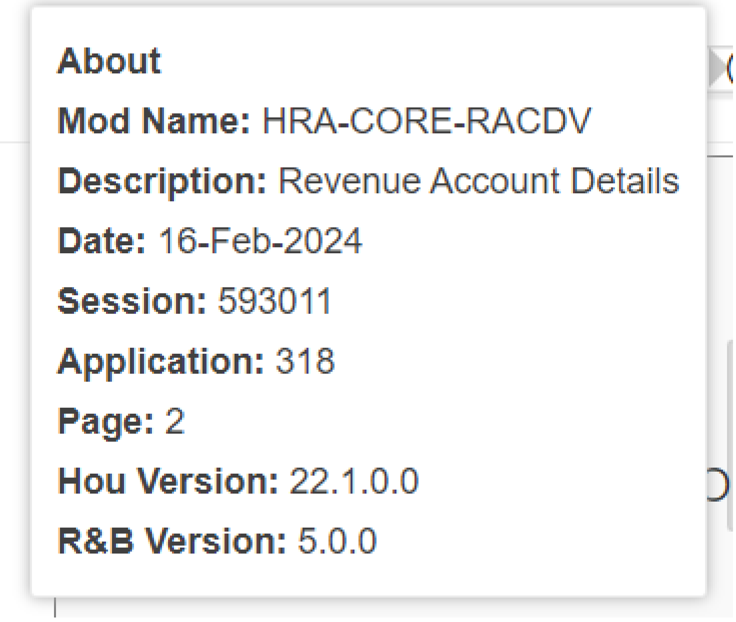
Please refer to the Support Services manual.

9. Housing Support Referrals

Please refer to the Support Services manual.

10. Reporting Issues

In the event you have any issues with the system or cannot get access to an area you should be able to please contact the IHMS or Systems team with a description of the issue and a screen print of the information page on NEC. This can be found on every page and wizard and is accessed by hovering over the information icon and should look like the image below.

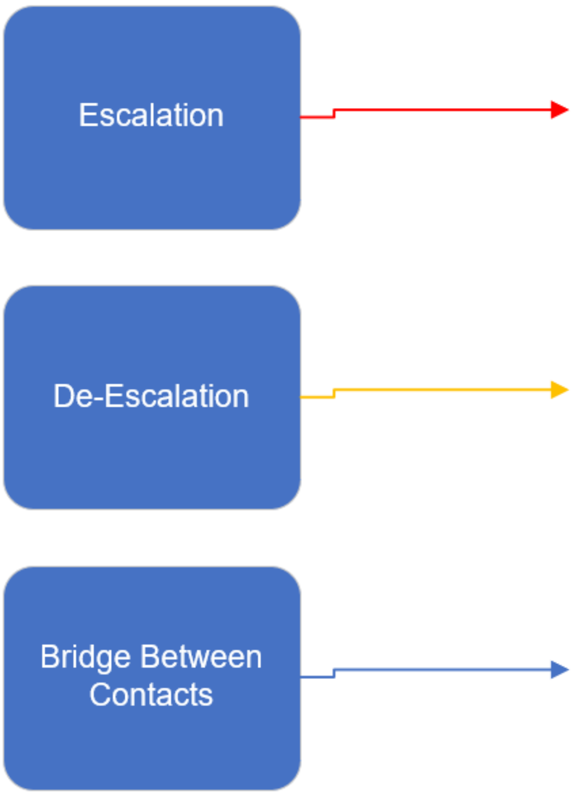


11. Escalations

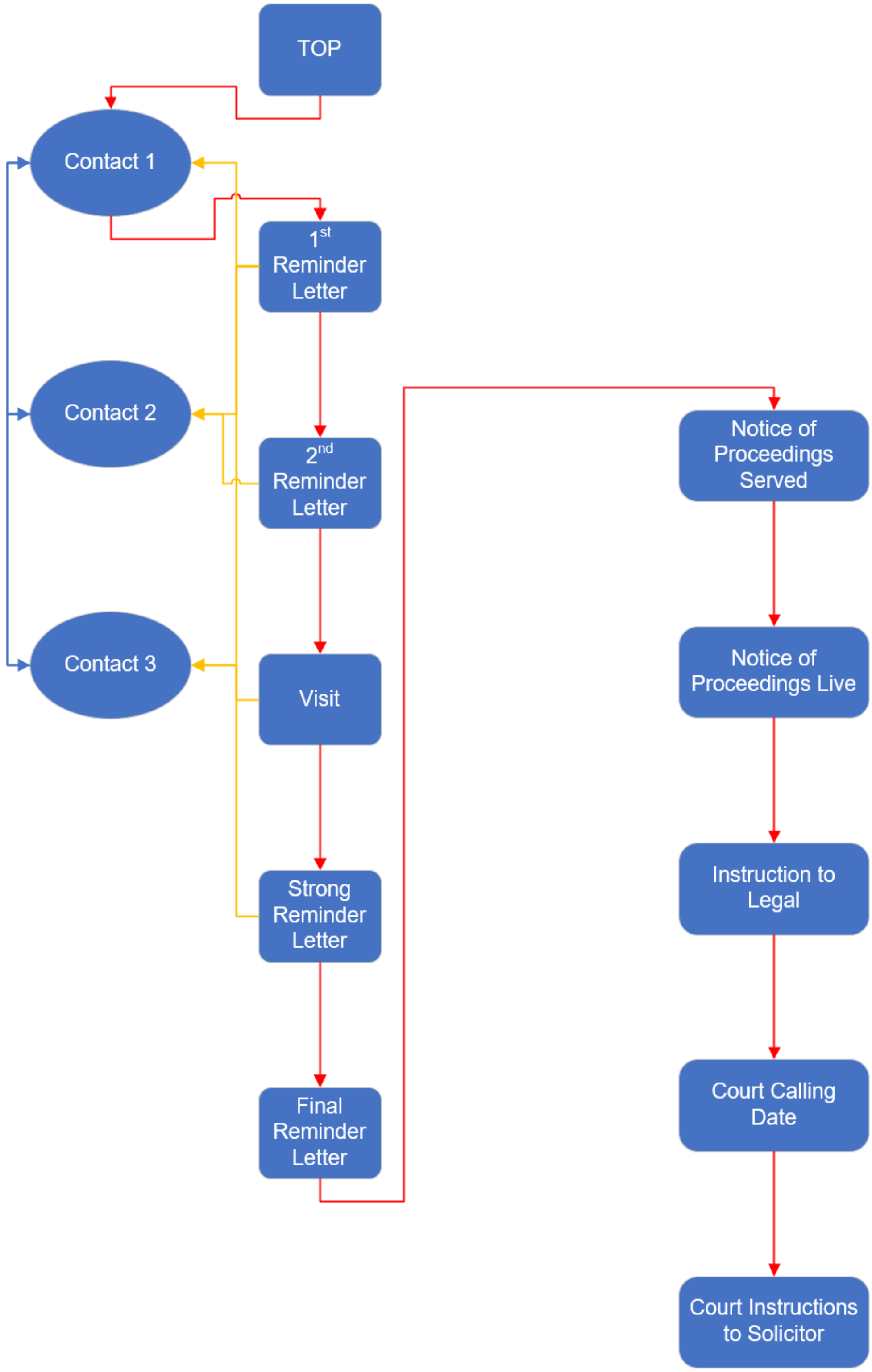
Escalation policies are used to monitor accounts in arrears and define the way arrears actions will be taken against associated accounts. Any number of actions can be linked together to form an escalation policy, and the progressions are built based on any or all of the following criteria;

- A range of arrears between 'x' and 'y'
- A number of consecutive periods in arrears
- A greater balance of 'x' times the rent
- A balance change.

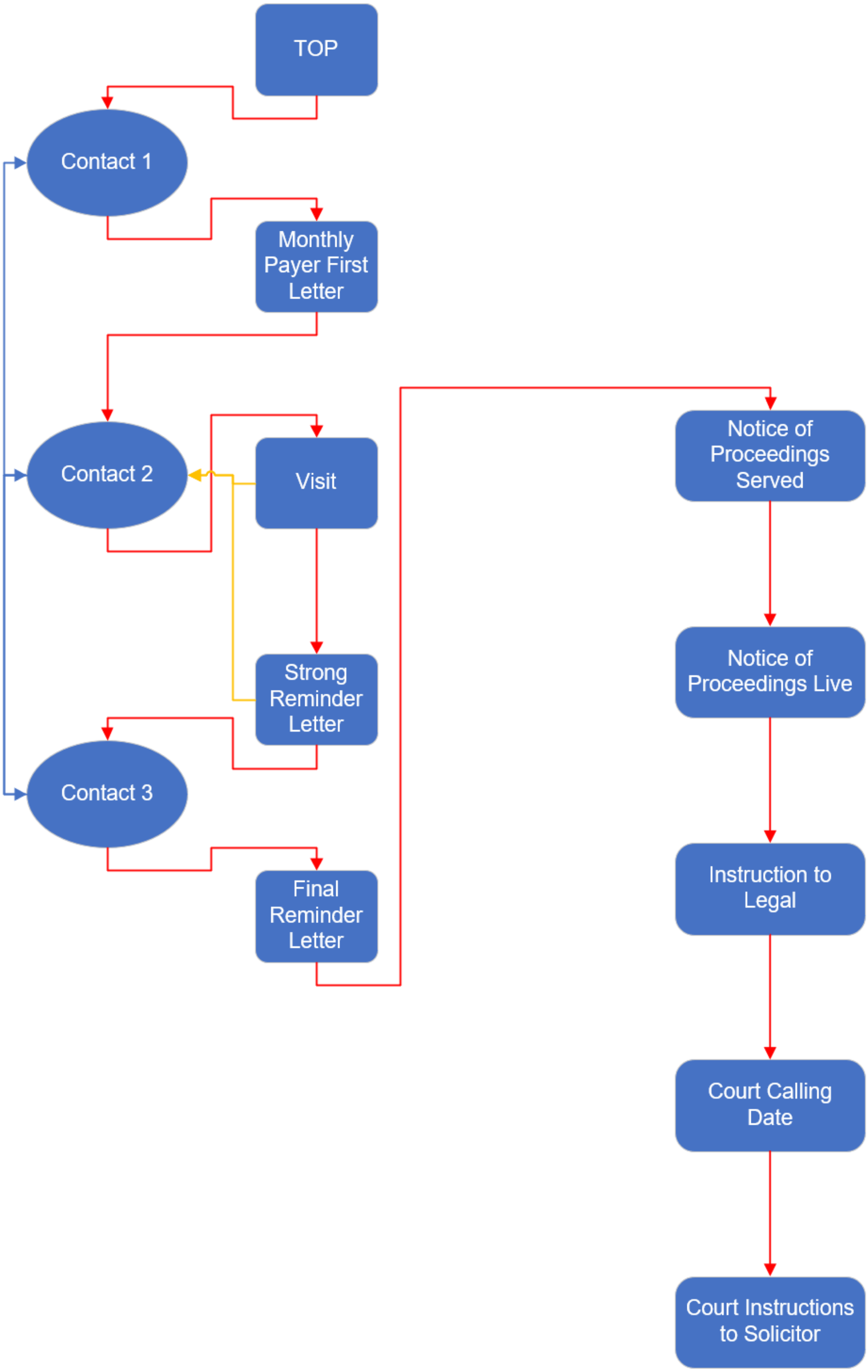
An escalation policy can both be escalated and de-escalated by progressions through the policy where it has been setup.



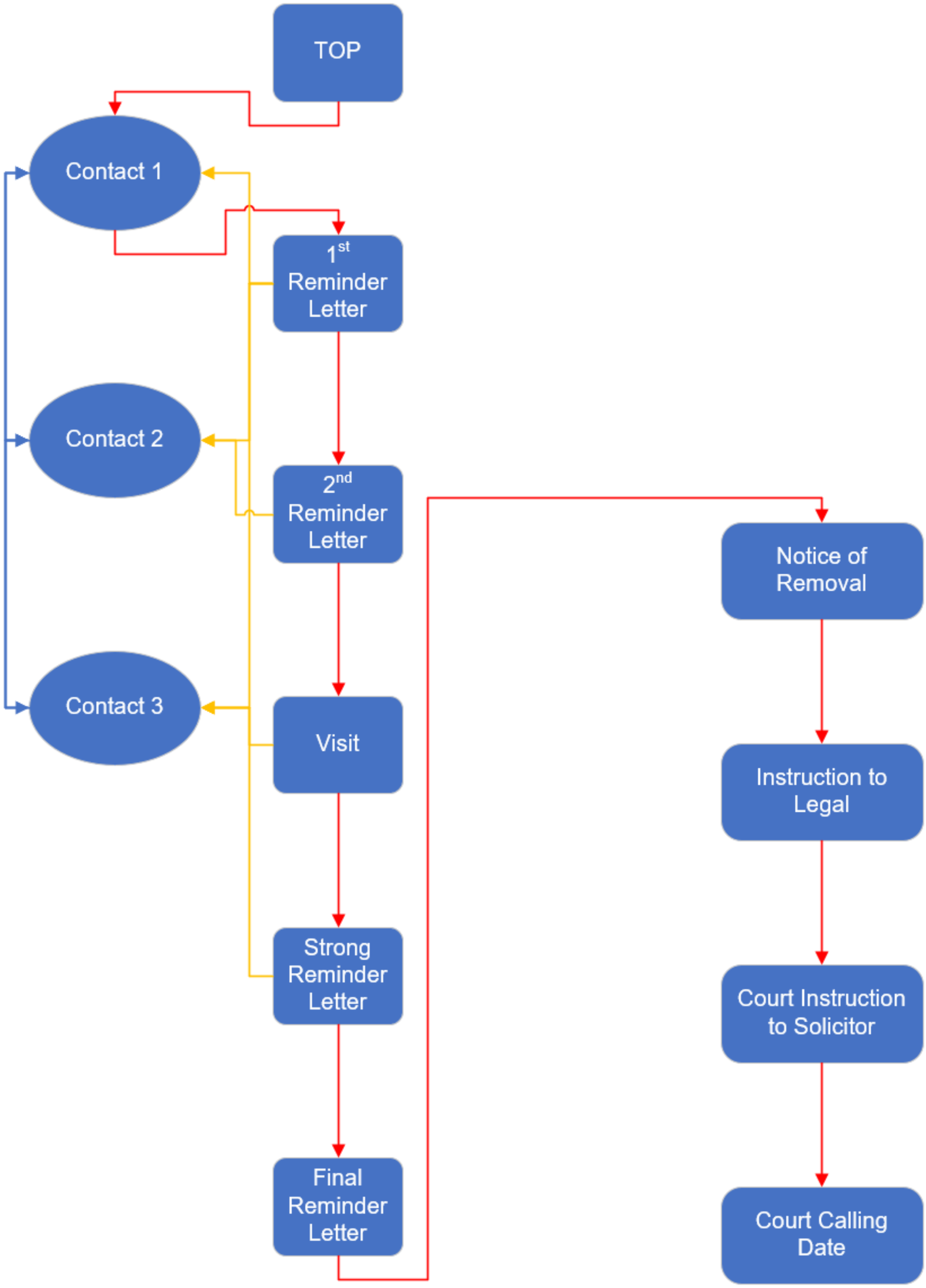
10.1 Weekly48 – WK48R



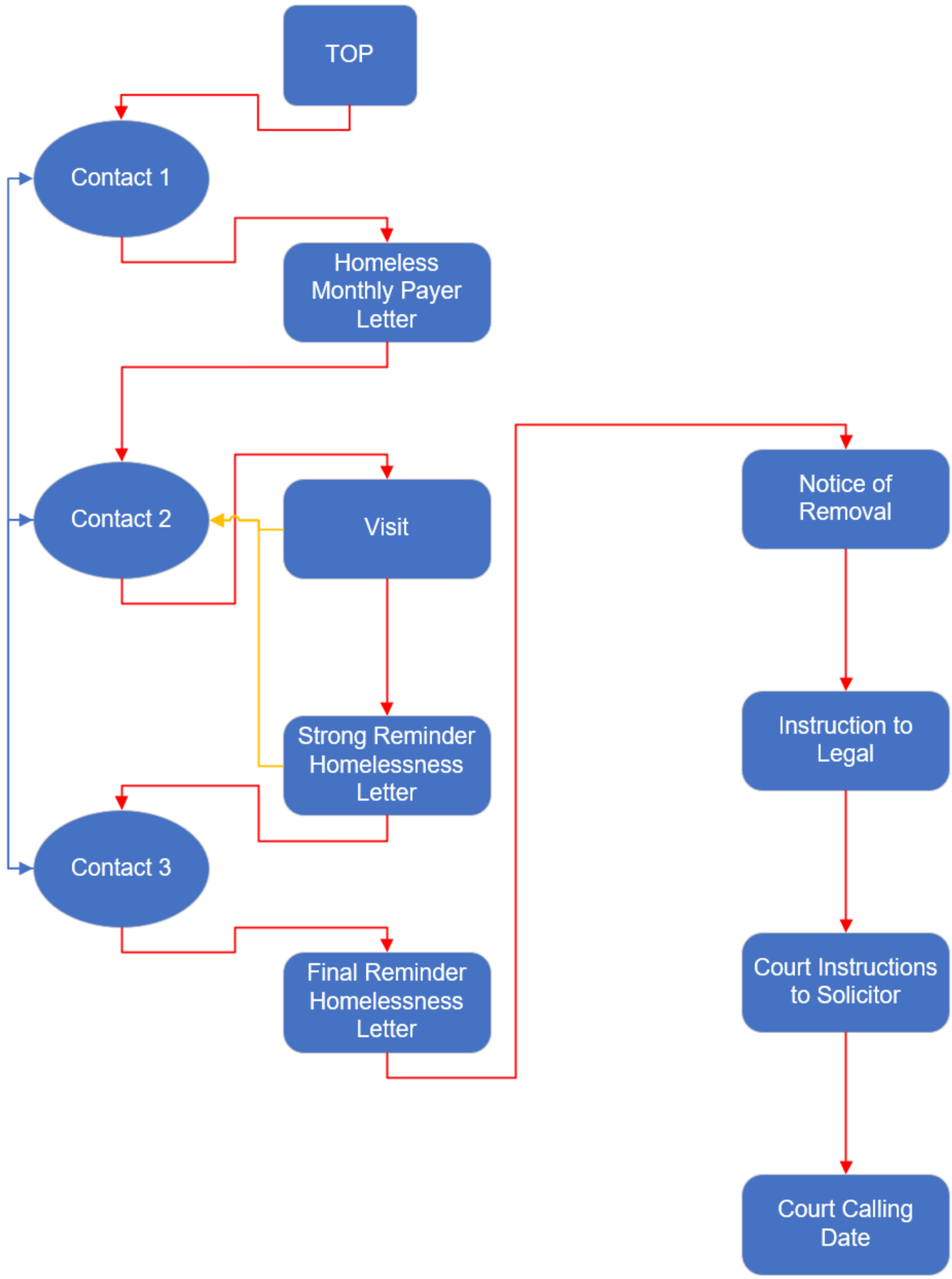
10.2 Monthly48 – MNTH48R



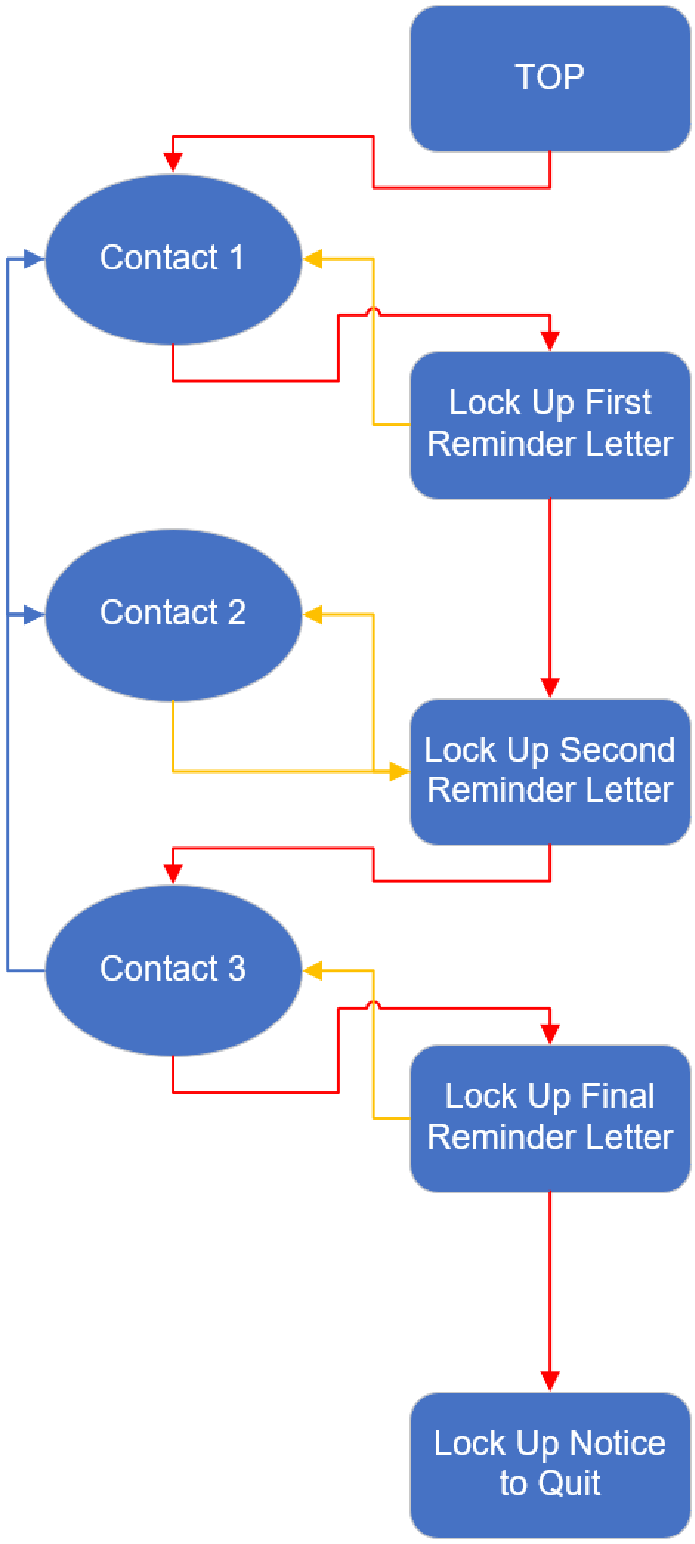
10.3 Weekly52 – WK52



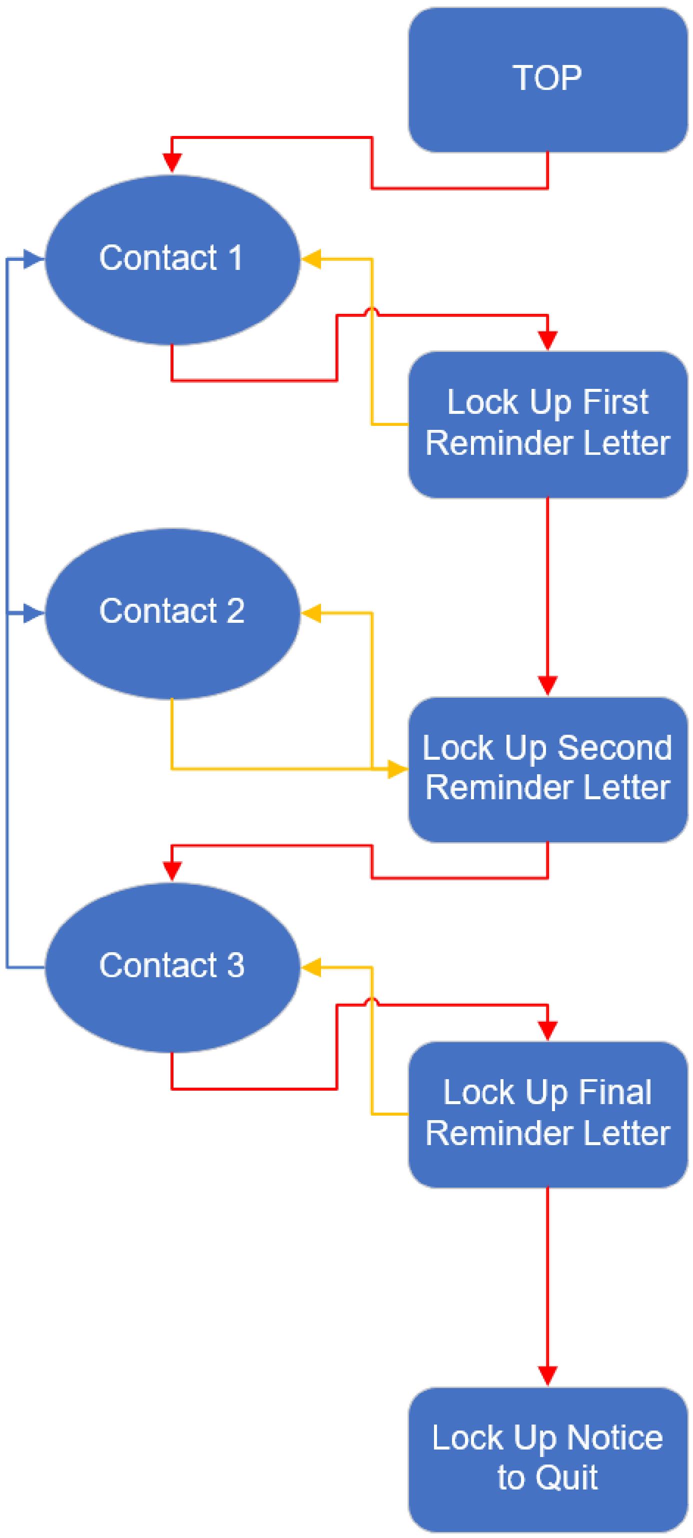
10.4 Monthly52 – MNTH52



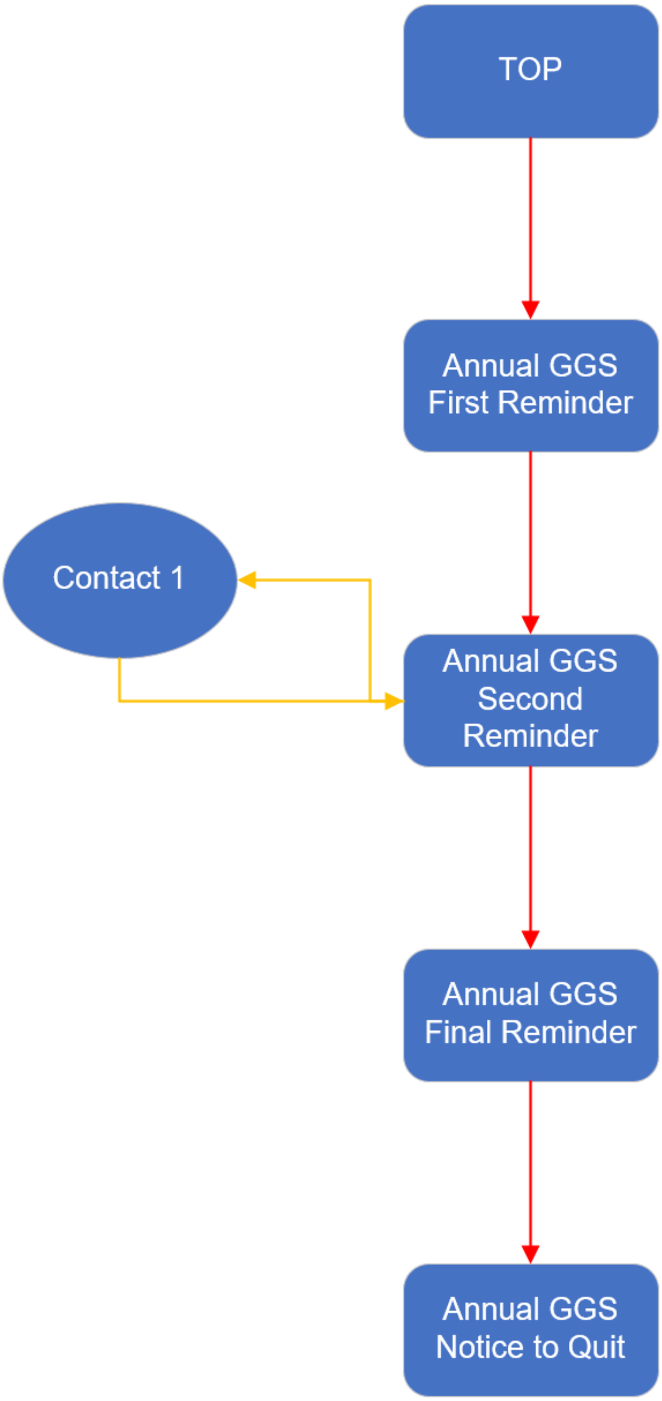
10.5 Weekly48 Non-Residential – WK48NR



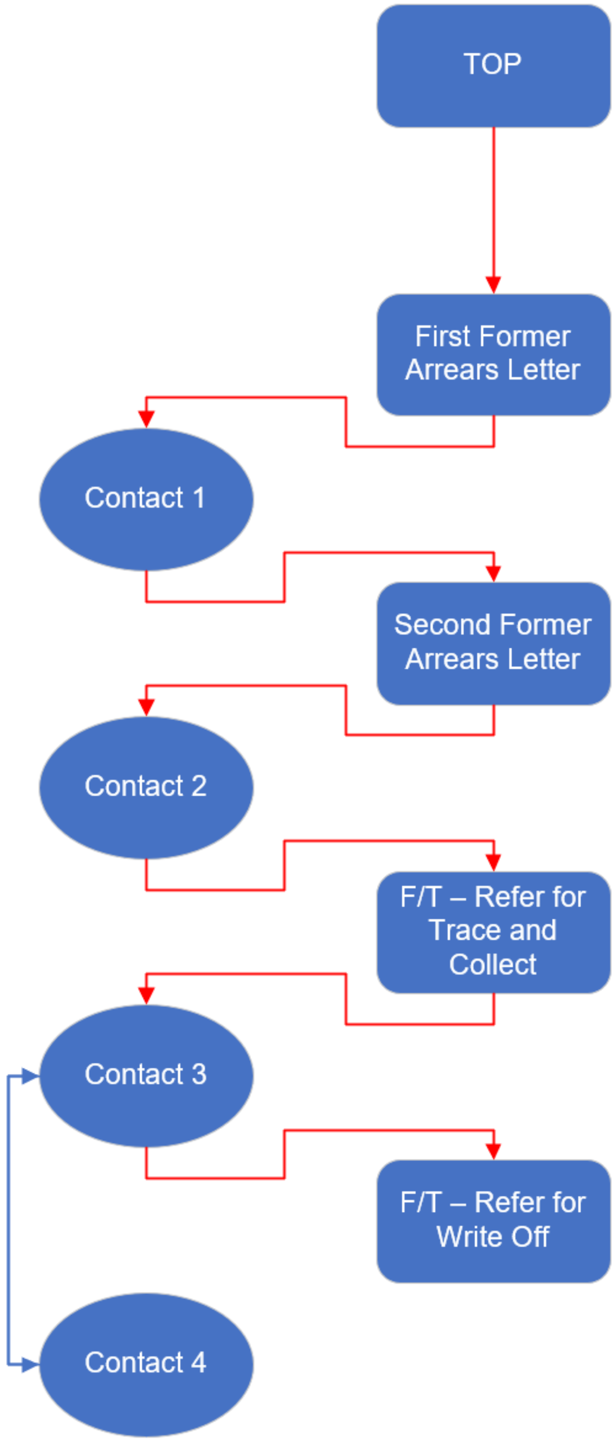
10.6 Monthly48 Non-Residential – MNTH48NR



10.7 Annual Garage Ground Site - ANNGGS



10.8 Former - FORMER



12. Arrears Actions and Letters

11.1 Weekly48 – WK48R

Code	Name	Description	Letter Code	Letter Name
CON1	Contact 1	To record a contact with the tenant, i.e. telephone, text or email.	-	-
CON2	Contact 2	To record a contact with the tenant, i.e. telephone, text or email.	-	-
CON3	Contact 3	To record a contact with the tenant, i.e. telephone, text or email.	-	-
1RL	First Reminder Letter	To send out a first reminder letter.	DTI_ARR_1RL	First Reminder Letter
2RL	Second Reminder Letter	To send out a second reminder letter.	DTI_ARR_2RL	Second Reminder Letter
VST	Visit	To record a visit with the tenant.	-	-
SRL	Strong Reminder Letter	To send out a strong reminder letter.	DTI_ARR_SRL	Strong Reminder Letter
FRL	Final Reminder Letter	To send out a final reminder letter.	DTI_ARR_FRL	Final Reminder Letter
NOPS	Notice of Proceedings Served	To record a notice of proceedings being served.	-	-
NOSP	Notice of Proceedings Live	To record a notice of proceedings going live.	-	-
ITL	Instruction to Legal	To record instructions to legal have been sent.	-	-
CCD	Court Calling Date	To record a court calling date.	-	-
CIS	Court Instructions to Solicitor	To record court instructions being sent to the solicitor.	-	-

11.2 Monthly48 – MNTH48R

Code	Name	Description	Letter Code	Letter Name
CON1	Contact 1	To record a contact with the tenant, i.e. telephone, text or email.	-	-
CON2	Contact 2	To record a contact with the tenant, i.e. telephone, text or email.	-	-
CON3	Contact 3	To record a contact with the tenant, i.e. telephone, text or email.	-	-
MP1L	Monthly Payer First Letter	To send out a monthly payer first letter.	DTI_ARR_M1	First Monthly Reminder Letter
VST	Visit	To record a visit with the tenant.	-	-
SRL	Strong Reminder Letter	To send out a strong reminder letter.	DTI_ARR_SRL	Strong Reminder Letter
FRL	Final Reminder Letter	To send out a final reminder letter.	DTI_ARR_FRL	Final Reminder Letter
NOPS	Notice of Proceedings Served	To record a notice of proceedings being served.	-	-
NOSP	Notice of Proceedings Live	To record a notice of proceedings going live.	-	-
ITL	Instruction to Legal	To record instructions to legal have been sent.	-	-
CCD	Court Calling Date	To record a court calling date.	-	-
CIS	Court Instructions to Solicitor	To record court instructions being sent to the solicitor.	-	-

11.3 Weekly52 – WK52

Code	Name	Description	Letter Code	Letter Name
CON1	Contact 1	To record a contact with the tenant, i.e. telephone, text or email.	-	-
CON2	Contact 2	To record a contact with the tenant, i.e. telephone, text or email.	-	-
CON3	Contact 3	To record a contact with the tenant, i.e. telephone, text or email.	-	-
H1RL	First Reminder Homelessness	To send out a first reminder letter.	DTI_ARR_1RL	First Reminder Letter
H2RL	Second Reminder Homelessness	To send out a second reminder letter.	DTI_ARR_2RL	Second Reminder Letter
VST	Visit	To record a visit with the tenant.	-	-
HSRL	Strong Reminder Homelessness	To send out a strong reminder letter.	DTI_ARR_SRL	Strong Reminder Letter
HFRL	Final Reminder Homelessness	To send out a final reminder letter.	DTI_ARR_FRL	Final Reminder Letter
NOR	Notice of Removal	To record the notice of removal being served	-	-
ITL	Instruction to Legal	To record instructions to legal have been sent.	-	-
CCD	Court Calling Date	To record a court calling date.	-	-
CIS	Court Instructions to Solicitor	To record court instructions being sent to the solicitor.	-	-

11.4 Monthly52 – MNTH52

Code	Name	Description	Letter Code	Letter Name
CON1	Contact 1	To record a contact with the tenant, i.e. telephone, text or email.	-	-
CON2	Contact 2	To record a contact with the tenant, i.e. telephone, text or email.	-	-
CON3	Contact 3	To record a contact with the tenant, i.e. telephone, text or email.	-	-
HMP1	Homeless Monthly Payer First Letter	To send out a monthly payer first letter.	DTI_ARR_M1	First Monthly Reminder Letter
VST	Visit	To record a visit with the tenant.	-	-
HSRL	Strong Reminder Homelessness	To send out a strong reminder letter.	DTI_ARR_SRL	Strong Reminder Letter
HFRL	Final Reminder Homelessness	To send out a final reminder letter.	DTI_ARR_FRL	Final Reminder Letter
NOR	Notice of Removal	To record the notice of removal being served	-	-
ITL	Instruction to Legal	To record instructions to legal have been sent.	-	-
CCD	Court Calling Date	To record a court calling date.	-	-
CIS	Court Instructions to Solicitor	To record court instructions being sent to the solicitor.	-	-

11.5 Weekly48 Non-Residential – WK48NR

Code	Name	Description	Letter Code	Letter Name
CON1	Contact 1	To record a contact with the tenant, i.e. telephone, text or email.	-	-
CON2	Contact 2	To record a contact with the tenant, i.e. telephone, text or email.	-	-
CON3	Contact 3	To record a contact with the tenant, i.e. telephone, text or email.	-	-
G1RL	Lock Up First Reminder Letter	To send out the lock up first reminder letter	DTI_ARR_L1RL	Lock Up First Reminder Letter
2RG	Lock Up Second Reminder Letter	To send out the lock up second reminder letter	DTI_ARR_L2RL	Lock Up Second Reminder Letter
GFL	Lock Up Final Reminder Letter	To send out the lock up final reminder letter	DTI_ARR_L3RL	Lock Up Final Reminder Letter
GNTQ	Lock Up Notice to Quit	To send out the lock up notice to quit letter	DTI_ARR_NTQL	Lock Up Notice to Quit

11.6 Monthly48 Non-Residential – MNTHNR

Code	Name	Description	Letter Code	Letter Name
CON1	Contact 1	To record a contact with the tenant, i.e. telephone, text or email.	-	-
CON2	Contact 2	To record a contact with the tenant, i.e. telephone, text or email.	-	-
CON3	Contact 3	To record a contact with the tenant, i.e. telephone, text or email.	-	-
G1RL	Lock Up First Reminder Letter	To send out the lock up first reminder letter	DTI_ARR_L1RL	Lock Up First Reminder Letter
2RG	Lock Up Second Reminder Letter	To send out the lock up second reminder letter	DTI_ARR_L2RL	Lock Up Second Reminder Letter
GFL	Lock Up Final Reminder Letter	To send out the lock up final reminder letter	DTI_ARR_L3RL	Lock Up Final Reminder Letter
GNTQ	Lock Up Notice to Quit	To send out the lock up notice to quit letter	DTI_ARR_NTQL	Lock Up Notice to Quit

11.7 Annual Garage Ground Site - ANNGGS

Code	Name	Description	Letter Code	Letter Name
CON1	Contact 1	To record a contact with the tenant, i.e. telephone, text or email.	-	
A1RL	Annual GGS First Reminder Letter	To send out the annual garage first reminder letter	DTI_ARR_G1RL	Garage First Reminder Letter
A2RL	Annual GGS Second Reminder Letter	To send out the annual garage second reminder letter	DTI_ARR_G2RL	Garage Second Reminder Letter
AFL	Annual GGS Final Letter	To send out the annual garage final reminder letter	DTI_ARR_G3RL	Garage Final Reminder Letter
ANTQ	Annual GGS Notice to Quit	To send out the annual garage notice to quit letter	DTI_ARR_NTQG	Garage Notice to Quit

11.8 Former - FORMER

Code	Name	Description	Letter Code	Letter Name
CON1	Contact 1	To record a contact with the tenant, i.e. telephone, text or email.	-	
CON2	Contact 2	To record a contact with the tenant, i.e. telephone, text or email.	-	
CON3	Contact 3	To record a contact with the tenant, i.e. telephone, text or email.	-	
CON4	Contact 4	To record a contact with the tenant, i.e. telephone, text or email.	-	
FT1L	First Former Tenant Letter	To send out the first former tenant letter.	DTI_ARR_F1RL	First Former Arrears Letter
FT2L	Second Former Tenant Letter	To send out the second former tenant letter.	DTI_ARR_F2RL	Second Former Arrears Letter
RTC	F/T – Refer for Trace and Collect	To record a referral to trace and collect.	-	
RWO	F/T – Refer for Write Off	To record a referral for a write off.	-	

11.9 Arrears INFO Actions

Code	Name	Description	Letter Code	Letter Name
AC	Agreement Confirmed	To record an agreement being made.	DTI_ARR_ARRAGT	Agreement Letter
FTAG	Former Tenant Agreement	To record an agreement being made.	DTI_ARR_ARRAGT	Agreement Letter
AI	Agreement Instalments Letter	To send out the agreement instalments letter.	DTI_ARRSTAT	Agreement Instalments
ANM	Agreement Not Maintained	To send out the agreement not maintained letter.	DTI_ARR_ARRB	Agreement Not Maintained
BRAR	Broken Arrangement	To send out the broken agreement letter.	DTI_ARR_ARRBF1	Broken Agreement Letter
1UCR	First UC Rent Increase Letter	To send out the first UC rent increase letter.	DTI_ARR_UCN	First UC Rent Increase Letter
2UCR	Second UC Rent Increase Letter	To send out the second UC rent increase letter.	DTI_ARR_UCF	Second UC Rent Increase Letter
APP	Appointment Letter	To send out the appointment letter.	DTI_ARR_HUBAPP	Hub Appointment Letter
CPRA	Case Passed to Housing Rents Adviser	To record when a case is being passed to the housing rents adviser.	-	-
CUCP	Check UC Payments & Reset Code	To record when a case is being checked for UC Payments and to reset any escalations.	-	-
ESCU	Escalation Update	To record when an account moves between escalations.	-	-
HBU	Housing Benefit Underpayment	To record when an account has a housing benefit underpayment.	-	-
LGPY	Large Payment	To record when an account has a large payment and when this is passed to fraud for	-	-

		investigation along with the outcome of the investigation.		
MON	Monitor	To record when you are monitoring an account.	-	-
NCON	No Contact Letter	To send out the no contact letter.	DTI_ARR_NOCONT	No contact letter
NORD	Now On Rent Direct	To record when an account is now on rent direct.	-	-
PAYU	Payment Method Update	To record when a payment method has been updated.	-	-
PR	Payments Restarted	To record when payments have restarted.	-	-
PREA	Pre Aband Letter	To send out a pre abandon letter.	DTI_ARR_PREABD	Pre Aband letter
RDCP	Rent Direct - Check Payments	To record when a check is being done for rent direct payments.	-	-
RSTA	Full Rent Statement	To send out the full rent statement with dates.	DTI_ARR_FULLSTA	Full Rent Statement
RWO1	Write Off Requested	To record when a write off has been requested.	-	-
RWOA	Write Off Authorised	To record when a write off has been authorised.	-	-
SBAL	Static Balance Letter	To send out the static balance letter.	DTI_ARR_STATIC	Static letter
SRS	SRS/UC47 Completed	To record when you have completed an SRS or UC47 request.	-	-
STAT	12 Weekly Rent Statement	To send out the 12 weekly rent statement.	DTI_ARR_RENSTAT	12 Weekly Rent Statement
SWCR	Replacement Payment Card Ordered	To record and order a replacement payment card.	-	-
UC	UC in Payment	To record when UC is now being paid into the account.	-	-

UC1	UC 1 Month Outstanding Letter	To send out the UC 1 month outstanding letter.	DTI_ARR_UC1	UC Monthly Reminder Letter
UCA	UC Applied For	To record when a tenant has applied for UC.	-	-
UCPC	UC Payments Confirmed	To record when UC have confirmed payments.	-	-
UCS	UC Being Paid to Tenant Letter	To send out the UC being paid to tenant letter.	DTI_ARR_UCS	UC Being Paid to Tenant - Balance on Account
VRM	Visit Regarding Missed Direct Debit	To record a visit made to the tenant regarding a missed direct debit.	-	-
VRP	Visit Regarding Payments	To record a visit made to the tenant regarding missed payments.	-	-
XMAS	Christmas Letter	To send out the Christmas letter.	DTI_ARR_XMAS	Christmas rents notice
YE	Year End Letter	To send out the year end letter.	DTI_ARR_YEAREND	Year End letter

11.10 Court INFO Actions

Code	Name	Description	Letter Code	Letter Name
AC	Agreement Confirmed	To record an agreement being made.	DTI_ARR_ARRAGT	Agreement Letter
ADAG	After Decree- Agreement	To record an agreement being made.	DTI_ARR_ARRAGT	Agreement Letter
ARR	Agreement Pre NOSP	To record an agreement being made.	DTI_ARR_ARRAGT	Agreement Letter
CCA	Case Continued Agreement	To record an agreement being made.	DTI_ARR_ARRAGT	Agreement Letter
CSA	Case Sisted Agreement	To record an agreement being made.	DTI_ARR_ARRAGT	Agreement Letter
HRAA	Hsg Rents Adviser - Agreement	To record an agreement being made.	DTI_ARR_ARRAGT	Agreement Letter
NOPA	Agreement After NOSP	To record an agreement being made.	DTI_ARR_ARRAGT	Agreement Letter
PCA	Pre Calling Agreement	To record an agreement being made.	DTI_ARR_ARRAGT	Agreement Letter
7PL	Seven Day Pre Legal Letter	To send out the seven day pre legal letter.	DTI_ARR_7DNCA	7 day NCA letter
APH	Awaiting Proof Hearing	To record when you are waiting for a proof hearing	-	-
CC	Case Continued	To send out the case continued letter.	DTI_ARR_CASECON	Case continued
CD	Case Dismissed	To send out the case dismissed letter.	DTI_ARR_DIS	Dismissed letter
CDE	Case Dismissed with Expenses	To send out the case dismissed with expenses letter.	DTI_ARR_DISEXP	Dismissed with expenses letter
COND	Conjoined Decree	To send out the conjoined decree letter.	DTI_ARR_CONDAL	Conjoined decree award letter
CPLA	Case Passed for Legal Action	To record when a case is passed for legal action.	-	-

CS	Case Sisted	To send out the case sisted letter.	DTI_ARR_SIST	Settlement letter
DEJ	Decree For Ejection	To send out the decree for ejection letter.	DTI_ARR_DAL	Decree award letter - payment
DEXP	Decree For Expenses Only	To send out the decree for expenses only letter.	DTI_ARR_DALEXP	Decree award letter - payment & expenses
DPAY	Decree For Payment	To send out the decree for payment letter.	DTI_ARR_DALEXP	Decree award letter - payment & expenses
DREC	Decree Recalled	To record when a decree has been recalled.	-	-
EVCE	Eviction with Expenses	To send out the eviction with expenses letter.	DTI_ARR_EVCTEXP	Eviction with expenses letter
EVCP	Eviction with Payments	To send out the eviction with payments letter.	DTI_ARR_EVCTPAY	Eviction with payment letter
EVIC	Eviction	To send out the eviction letter.	DTI_ARR_EVCT	Eviction letter
FCC	First Court Calling	To record when a case is first calling to court by the legal team.	-	-
FTLG	F/T Legal	To record when a former tenant case is passed for legal action.	-	-
PD	Peremptory Diet	To send out the peremptory diet letter.	DTI_ARR_PREDIET	Peremptory diet letter
PH	Proof Hearing	To send out the proof hearing letter.	DTI_ARR_PHL	Proof hearing letter
PPH	Pre Proof Hearing	To send out the pre proof hearing letter.	DTI_ARR_PREPHL	Pre proof hearing letter
REV	Review Notice	To record a review notice.	-	-
RSIS	Recall SIST	To send out the recall sist letter.	DTI_ARR_RECSIST	Recall sist letter
SS16	SIST Section 16 Order	To send out the sist section 16 order letter.	DTI_ARR_SISTS16	Settlement S16 order
SUCS	SIST UC Settlement Letter	To send out the sist UC settlement letter.	DTI_ARR_SISTUC	Settlement UC letter