Estates User Guide

Contents

1. NEC Estates

1.1 Introduction

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

1.2 Objectives

This guide will help you to:

- Understand the role of Estates within NEC Housing.
- Recognise the links between the NEC Housing product areas.
- Gain access to NEC Housing.

1.3 Main Functions of Estates

Estates is the core product area of the NEC Housing application holding information about people and properties.

Other NEC Housing product areas, for example, Rents, Repairs and Allocations, all access the information within Estates, consequently, most of the data needed to run the system is set up and maintained within the Estates product area.

It is in Estates that details of administration units, properties, voids, tenancies, parties, and households are maintained.

The following business areas within Estates are important:

- Administration Units
- Properties
- Tenancies
- Voids
- Parties and Households

1.4 Administration Units

Administration units (or admin units) are used to group properties within NEC Housing to exercise financial controls, produce reports and limit user access.

Queries can be run on admin units to obtain information, for example, all void properties in the admin unit type of OFF (office) or accounts, in arrears by housing officer PAT (patch).

Admin unit groupings could reflect, for example, repair contract areas, estates, regions, political wards, and blocks of flats. Admin units may also be linked in a hierarchy with the property assigned to the lowest level, for example, a property may be assigned to a block, which is assigned to an estate, which is assigned to a region.

1.5 Properties

Properties are used to manage the housing stock held within NEC Housing.

Details of the address and features such as number of bedrooms, type of heating, lettings area etc. can be maintained.

1.6 Tenancies

Tenancies represent the formal linking of a person or people, known as tenants, with a property for a period. In business terms this link is the tenancy agreement.

Tenancies can be created, maintained, and terminated within Estates. However, if your organisation has the Allocations module, tenancies are normally created and, in some instances, terminated via Allocations.

1.7 Voids

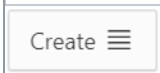
Void is a term used in housing to denote that a property is not occupied. The property may be void as it is newly acquired and has not yet been let or because the last tenancy has ended, and the next tenancy has not yet started.

Void management and reporting are found within the Estates and Allocations modules. This flexibility within void management and NEC Housing enables void properties to be closely monitored.

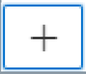
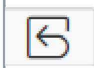
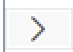
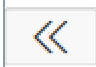
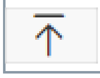
1.8 Parties and Households

Parties and households can be created, maintained, and terminated within Estates.

1.9 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.
	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:

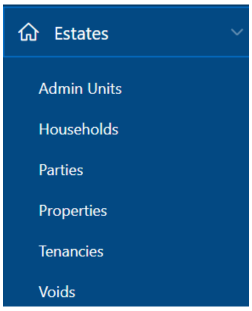
Type of Error	What this means
E – Error 	Action needed to be taken to continue process
I – Information 	For information

Q – Question	Likely to be a mandatory field
V – Validation	For information
W – Warning	Action needed to be taken to continue process

2. Navigation

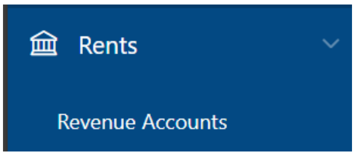
2.1 Navigating Tenancies, Properties, Voids and People

- From any page on the modules 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.



2.2 Navigating Rents

- From any page on the modules navigation on the left hand side find and select **‘Rents’.**
- Select **‘Revenue Accounts’**.

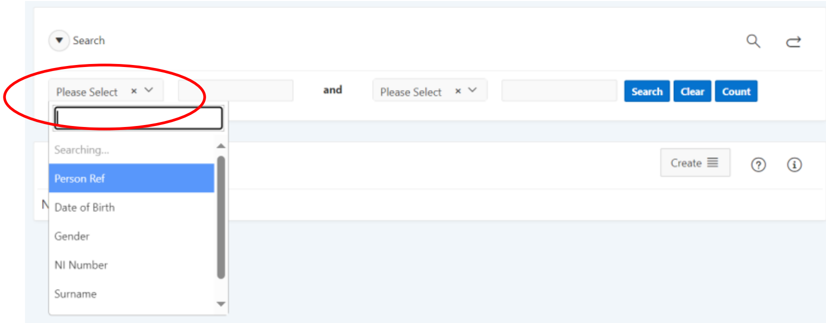


2.3 Navigating Pre Tenancy Rents and Housing Support Referrals

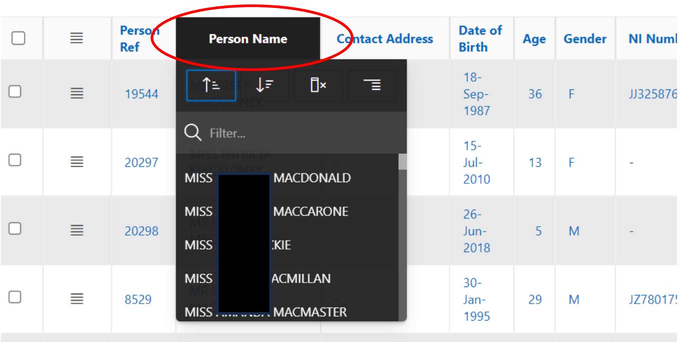
- From any page on the modules navigation on the left hand side find and select **‘Support Services’**
- Select **‘Referrals’**

2.4 Search Bar

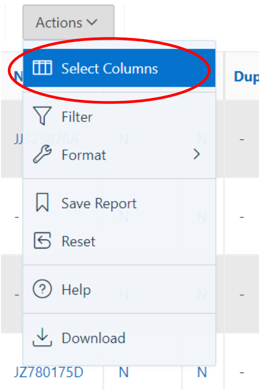
- From any module area you will find the search bar on the top. Here use the drop down to select the a search option to use, e.g. **‘Surname’**, **‘Admin Unit’**, **‘Reference’**



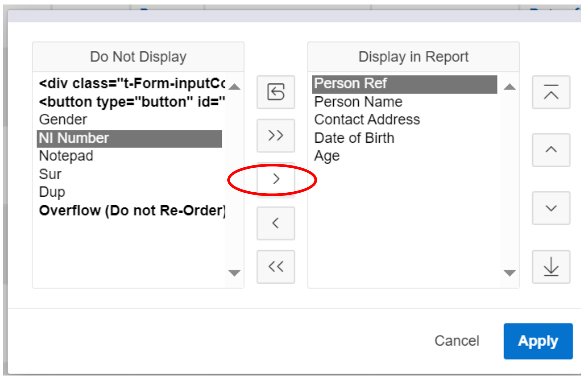
- Enter the details of your search item into the box next to the drop down.
- Click **'Search'**
- If there are multiple search results you can use the **'Column Headers'** to refine the search further by clicking on the desired header and using the sort of filter functions.



- 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'**.

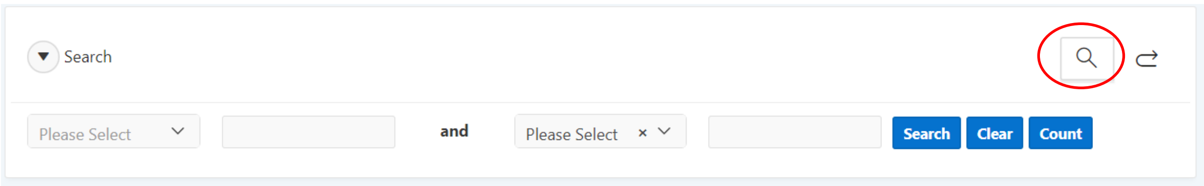


- Click **'Apply'**

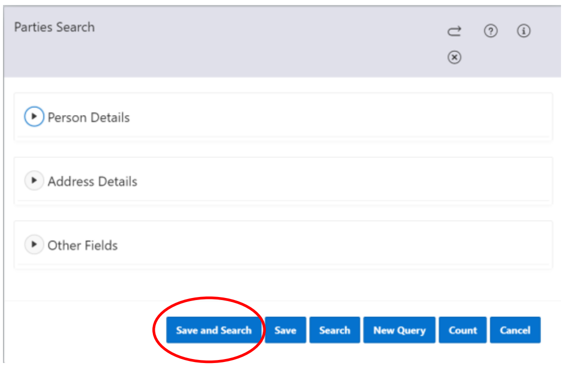
Note: You can use the % sign to do a wildcard search rather than entering specific information in the search bar. Similar to *** in Saffron.

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

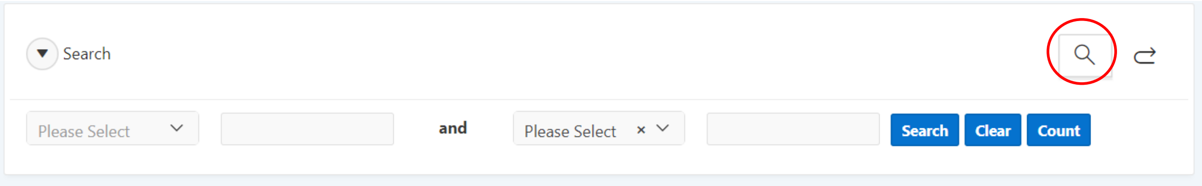


- Once you have completed any of the search requirements click **'Search'**

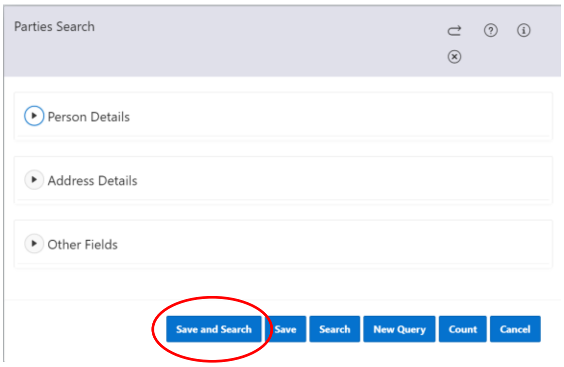
Note: You can use the % sign to do a wildcard search rather than entering specific information in the search bar. Similar to *** in Saffron.

2.6 Save a Search

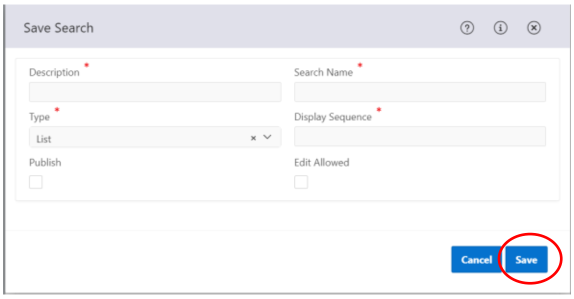
- From any module area you will find the search bar at the top and on the right-hand side you will find a magnifying glass for the **'Advanced Search'** which you will select.



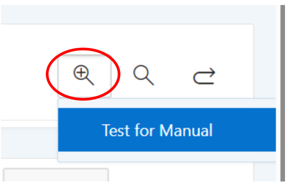
- From here use the search options to define how you would like to search. The search options are split into multiple options depending on your module area



- 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 magnifying glass with the plus sign **'Saved Searches'**



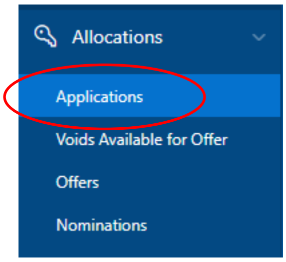
Note: You can only use one number for **'Display Sequence'** per saved search. Always best to start at 1 and work your way through the numbers.

2.7 Edit or Remove Saved Searches

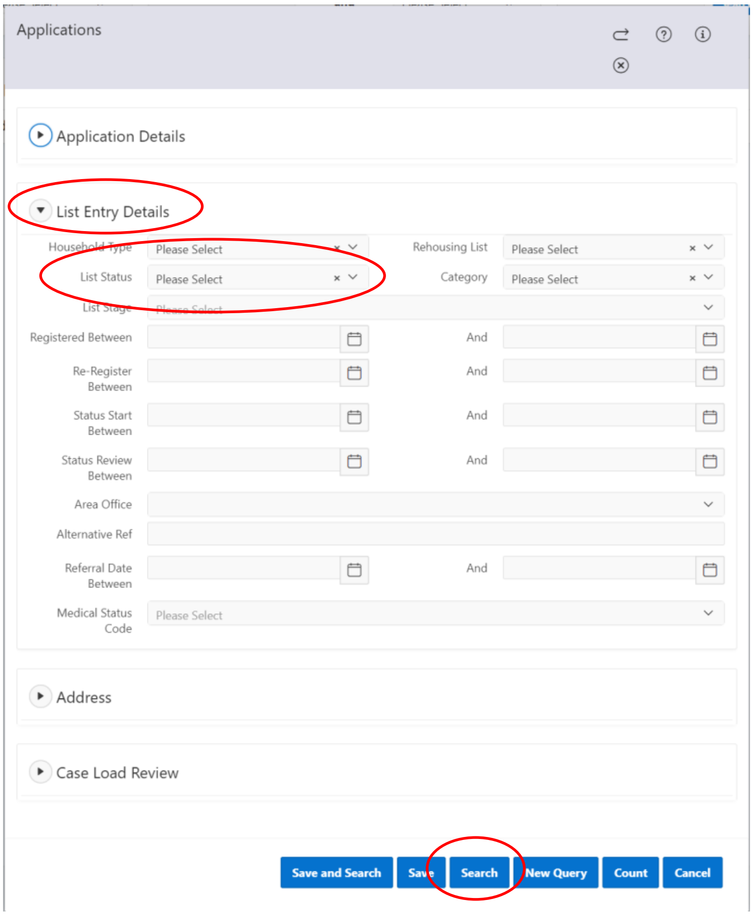
- Currently not available on our version of NEC

2.8 Viewing All Active Common Housing Register Applications (CHR)

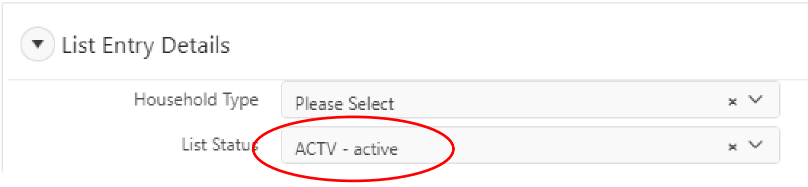
- From any module area select **'Allocations'**
- Select **'Applications'**



- Select the **'Advanced Search'**
- Scroll down to **'List Entry Details'** and open this section



- Use the **'List Status'** dropdown and select **'Active'**



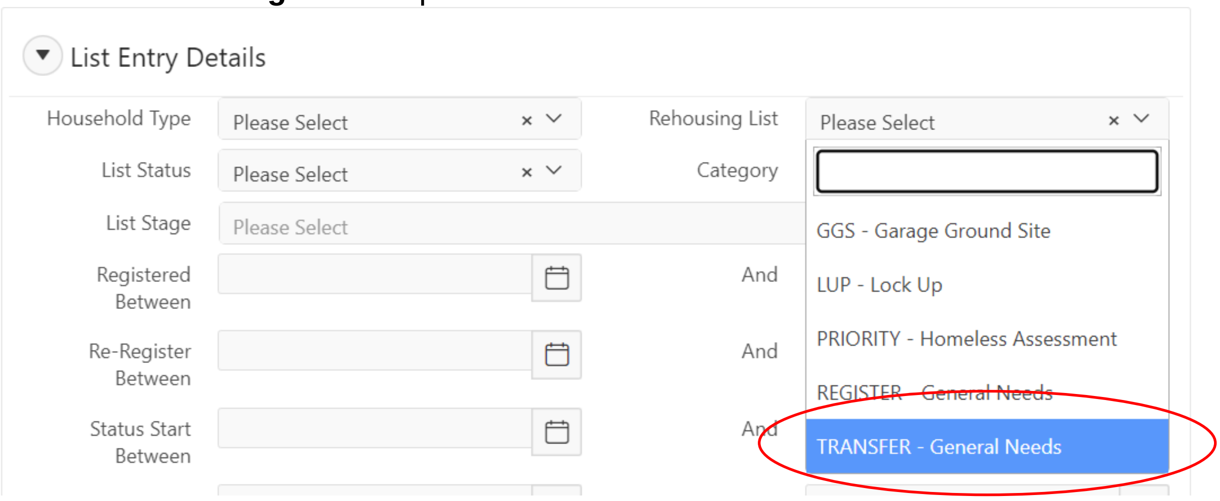
- From here either select **'Search'** to show you all active applications or add a tenant's details within the **'Advanced Search'** if you want to check on a particular tenant.

Note: 'UE - Under Entry' is when an application is first uploaded but not yet active.

Note: If you are in the person's page you can also view this information by clicking **'More'** and then **'Applications'** and any application attached to the person will sit here.

2.9 Check if a Tenant is on the Transfer List

- From any module area select **'Allocation'**
- Select **'Applications'**
- Select the **'Advanced Search'**
- Scroll down to **'List Entry Details'** and open this section
- Use the **'Rehousing List'** dropdown and select **'Transfer – General Needs'**



- From here either select **'Search'** to show you all applicants on the transfer list or add a tenant's details within the 'Advanced Search' if you want to check on a particular tenant.

Note: If a tenant has arrears without a repayment agreement they will not be eligible for a transfer. Liaise with Rents.

Note: If you are in the person's page you can also view this information by clicking **'More'** and then **'Applications'** and any application attached to the person will sit here.

2.10 Check if a Tenant is Under Offer

- From any module area select **‘Allocation’**
- Select **‘Applications’**
- Use the **‘Search Bar’** to search for the tenant
- The column **‘Off’** will show as **‘O’** if under offer

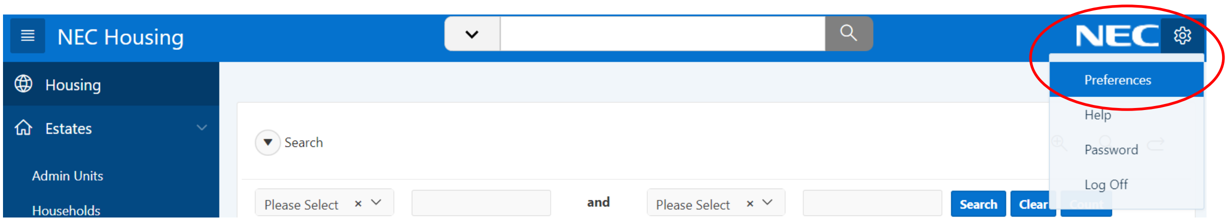
≡	Application Ref	Received	Name	Off	Nom	Ntp	Rfs	Status	
≡	5303	22/09/2023	[redacted]	O	N	N	-	CUR	⤢

- Click on the tenant if you want more information
- Select **‘Offer History’** from the menu at the top which will show the offer history detailing any acceptances or refusals.

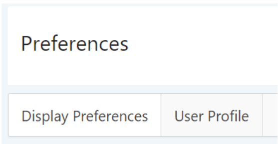
Note: If you are in the person’s page you can also view this information by clicking **‘More’** and then **‘Applications’** and any application attached to the person will sit here.

2.11 Update your System Preferences

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



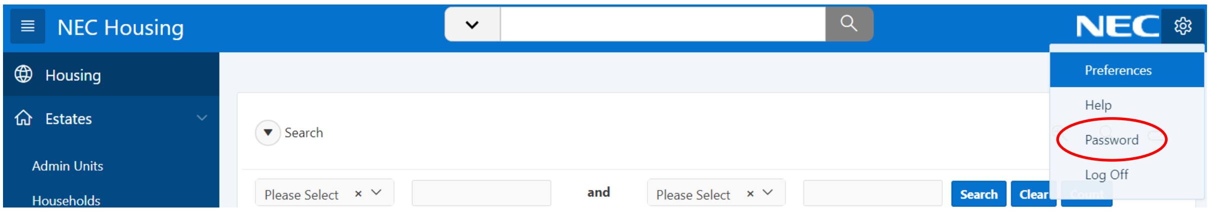
- Click **‘Preferences’**
- From here you can update your **‘Display Preferences’** and **‘User Profile’**.



- Once any changes are made click **‘Save’**

2.12 Update your System Password

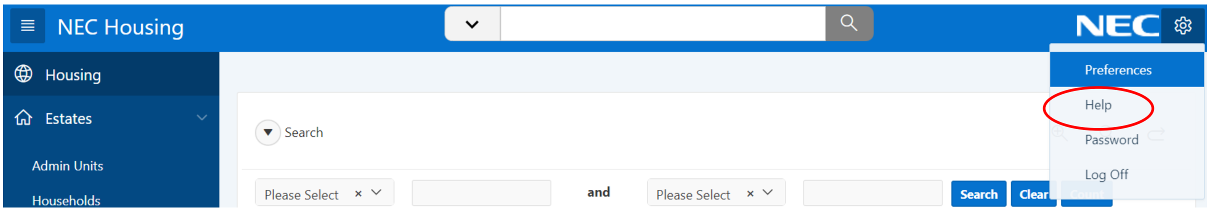
- From any page click the **‘Gear’** on the top right-hand corner to open **‘System Menu’**



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

2.13 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

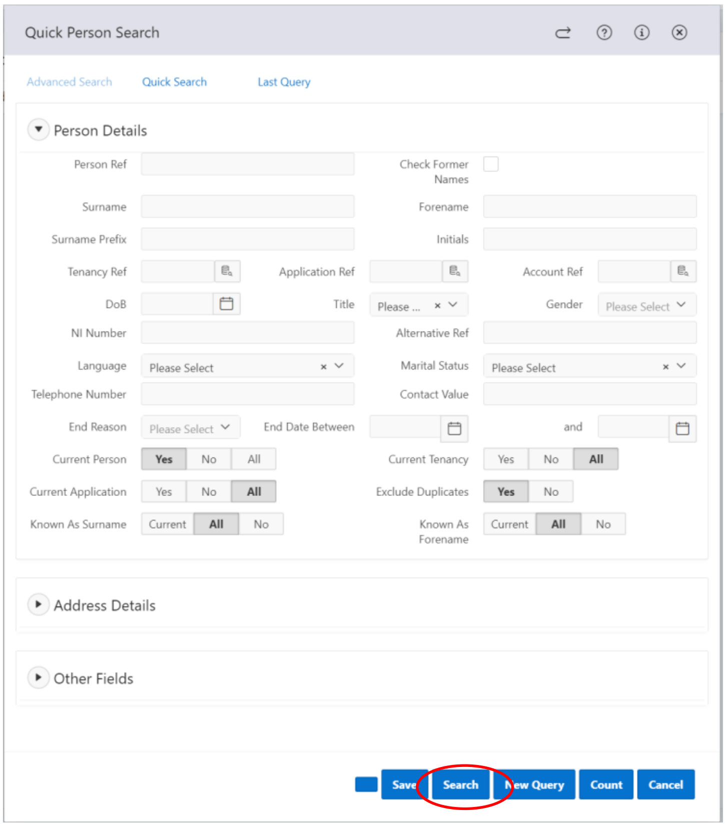
Interested parties are used throughout NEC Housing. They are people or organisations that perform specific functions such as inspectors in repairs, housing visitors or homeless caseworkers in allocations, stores, and repairs operatives in Contractors.

3.2 Creating People

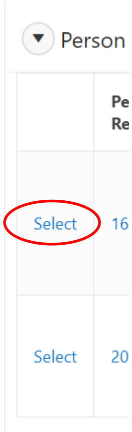
- In **'Parties'**, click the **'Create'** and then **'Create a Person'**

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

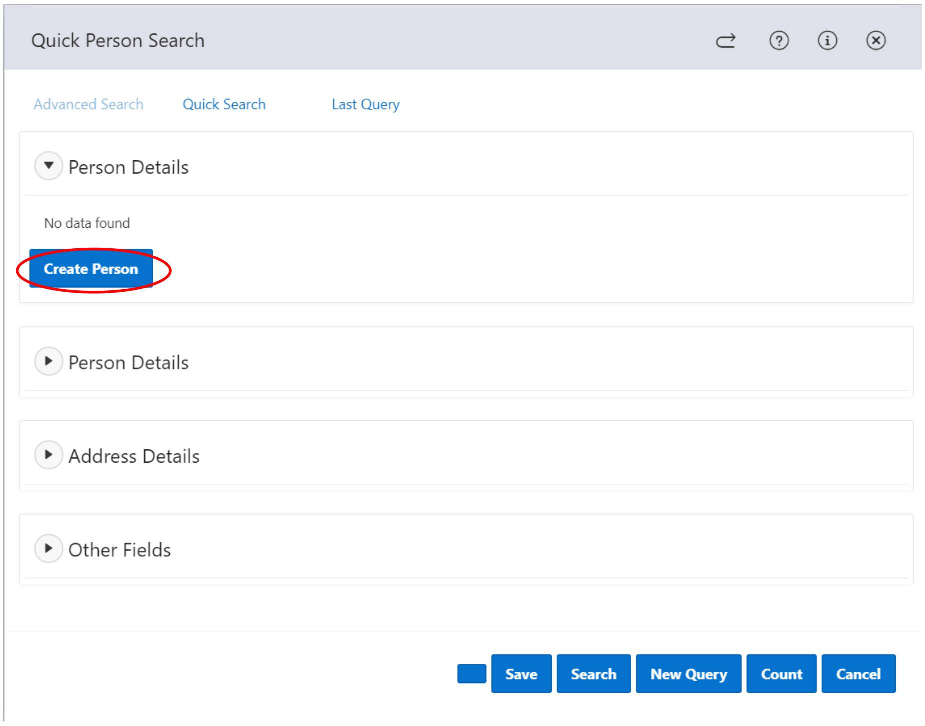
Info:
To prevent duplicate records being created, the system requires you to check to see if the person already exists in the database before you create a new record for them.



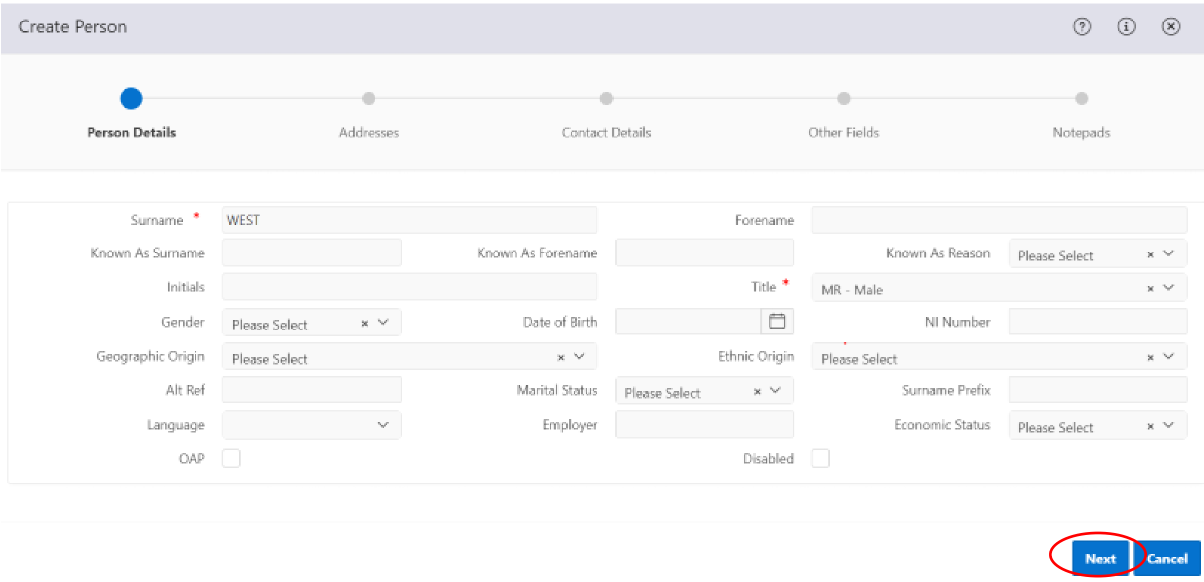
- If a record returns that matches who you want to create, click **'Select'** on that person and this ends the **'Create a Person'** wizard.



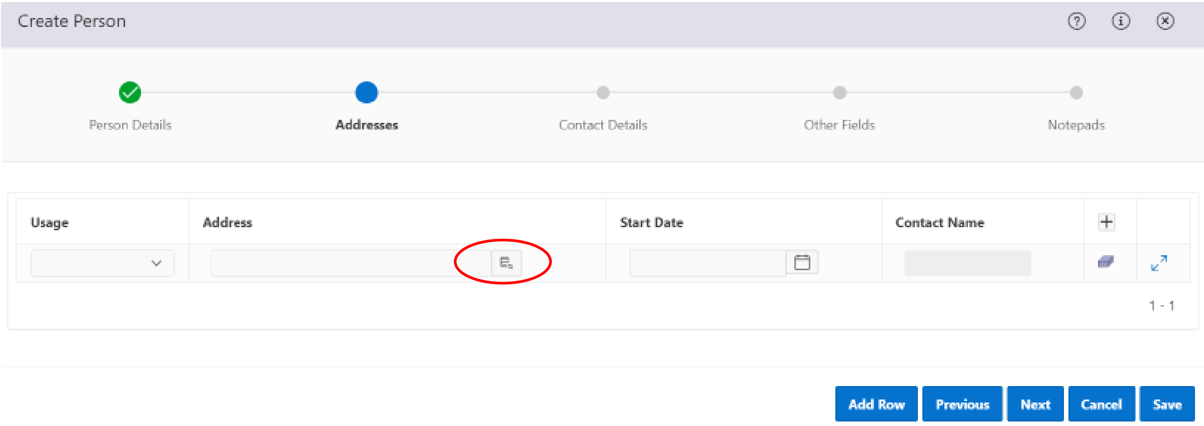
- If a person record does not match the person you are trying to create, or the system displays a message of **'No Data Found'** click **'Create Person'**



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

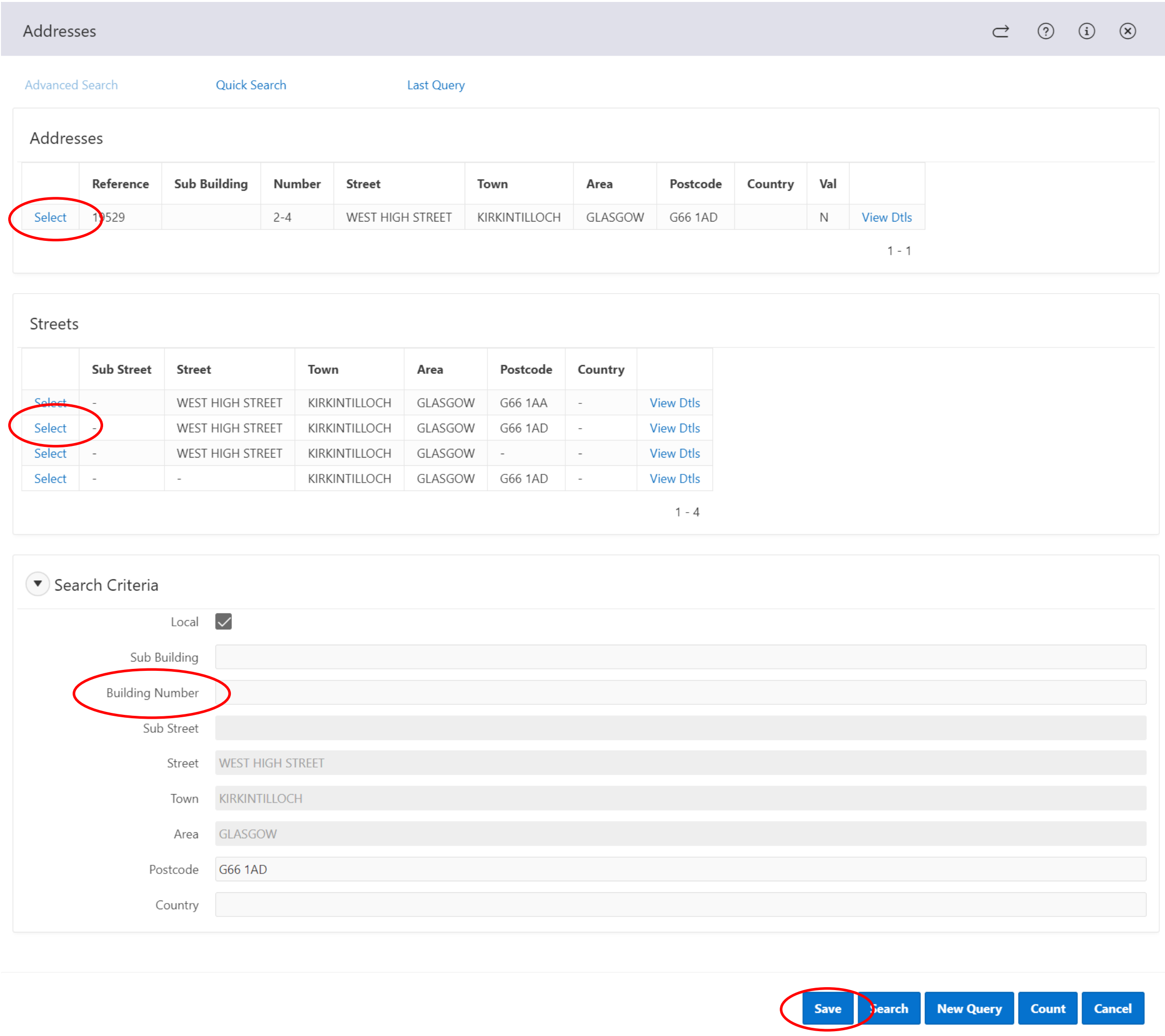


- Complete the **‘Addresses’** section of the **‘Create Person’** by selecting the **‘Open Search’** on the Address column and using this to find the person’s address.

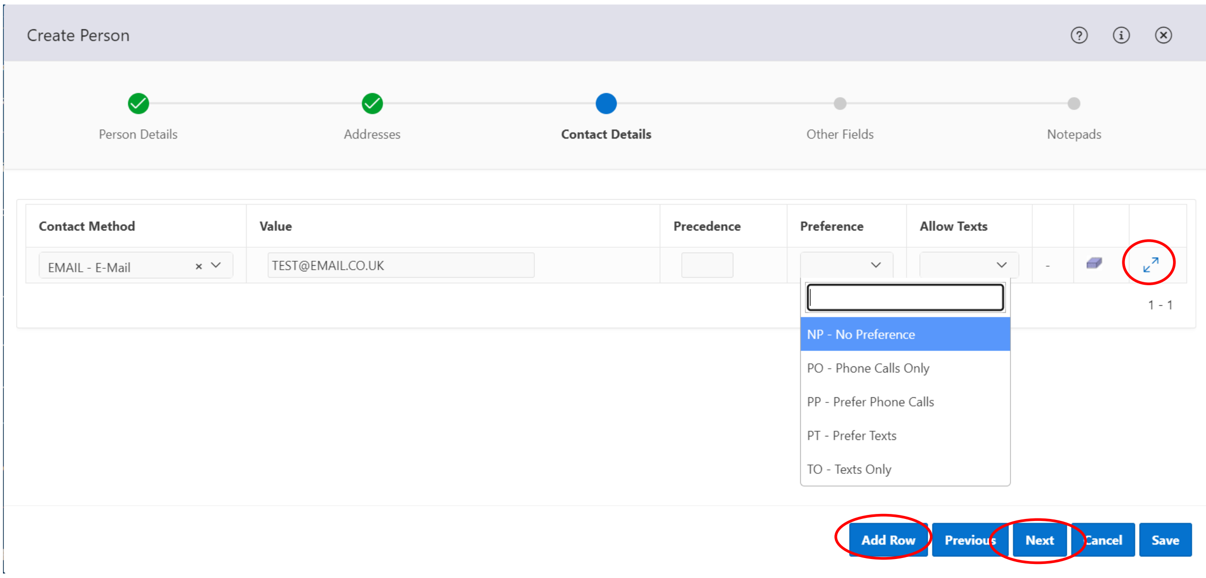


- This opens the **'Addresses'** search where you must insert the address you need, making sure to use the postcode, area or town. Click **'Search'**

- 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'**

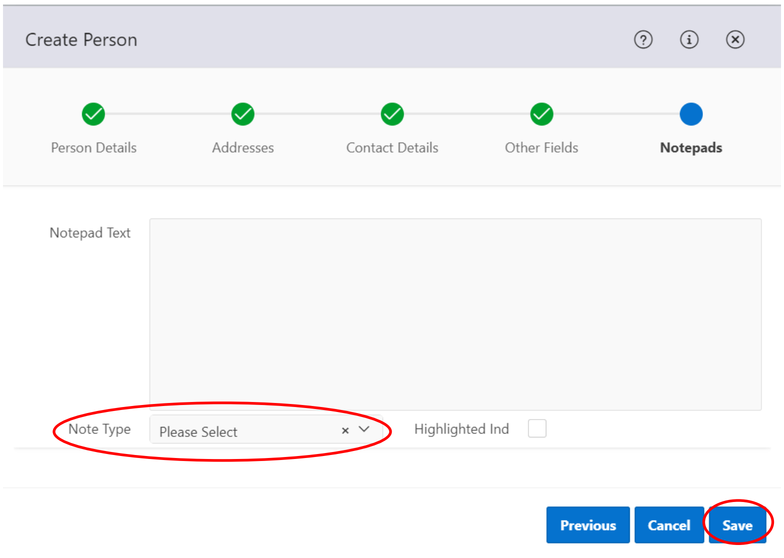


- This brings you back to the **'Addresses'** page on **'Create a Person'** wizard where you need to add the start date and contact name if required. Once done click **'Next'**
- Complete the **'Contact Details'** page by adding the person's contact details by clicking **'Add Row'** for each new contact 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.

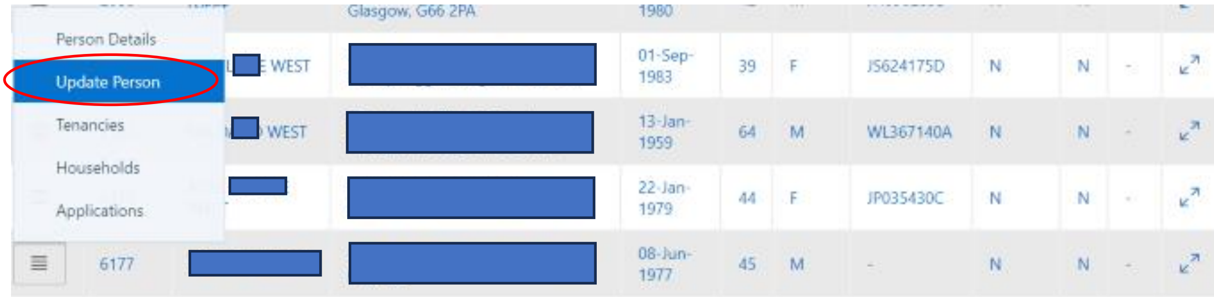
- Complete the **'Other Fields'** page if required to place an **'Alias'** and then click **'Next'**.
- Complete the **'Notepads'** page if you require to place a note for Consent, Warning Messages or Interpreter Required.



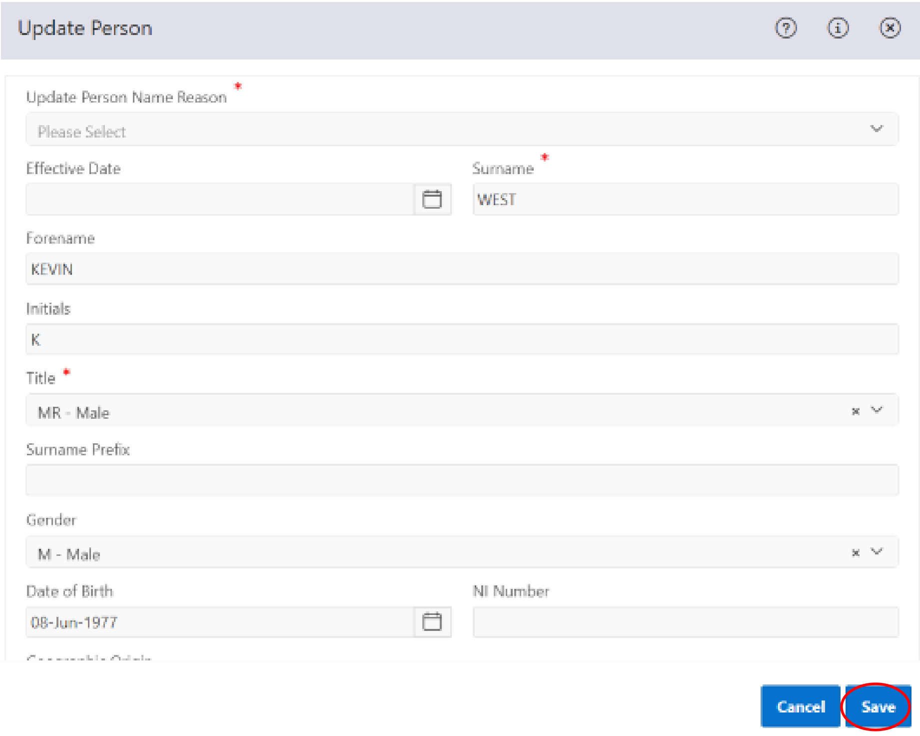
- Click **'Save'**

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.

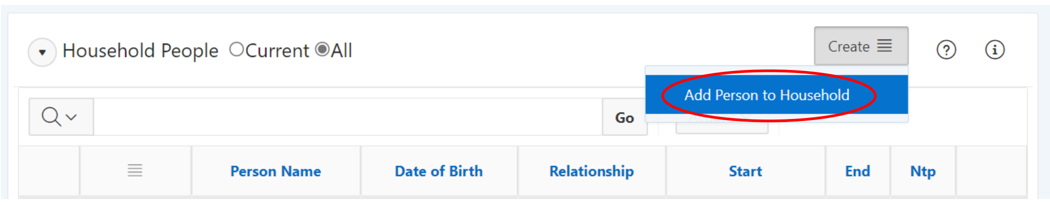


- Click **'Save'**

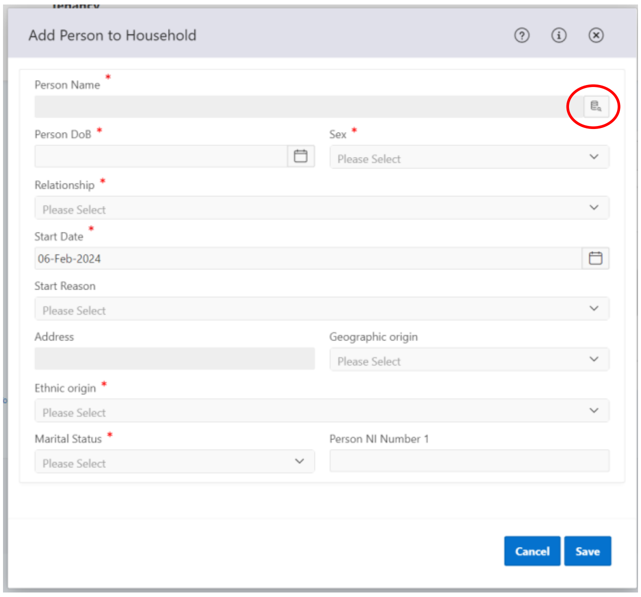
3.4 Household Members

3.4.1 Add Household Members

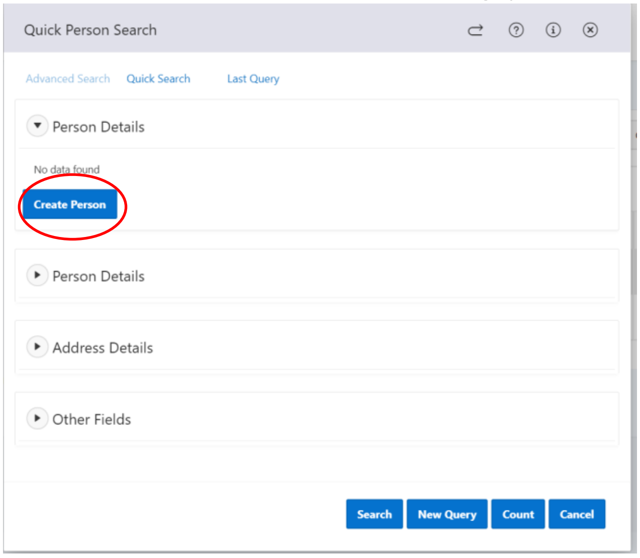
- In **'Households'**, search for the household of the main tenant using the basic or advanced search options
- Click **'Row Action'** on the main tenant and select **'Household Details'**
- When the **'Household Details'** page loads, click **'Create'** on the right-hand side and then click **'Add Person to Household'**



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



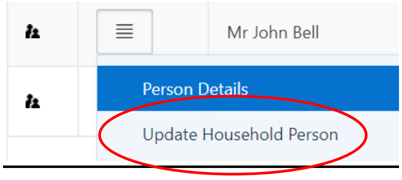
- If the person does not exists click **'Create Person'** and follow the **'Create Person'** wizard ensuring you've completed all the mandatory fields.



- 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

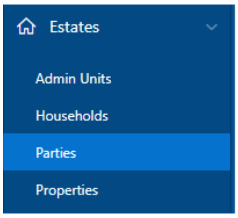
- In **'Households'**, search for the household of the main tenant using the basic or advanced search options
- Click **'Row Action'** on the main tenant and select **'Household Details'**
- In the **'Household People'** section at the bottom, look for the household member you want to update or remove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



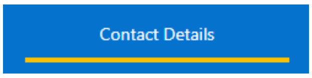
- In the **'Update Person to Household'** wizard, either update their details or use the **'Calendar'** on the **'End Date'** field to put the date the person was no longer part of the household
- If removing the person select a reason as to why they left the household in the **'End Reason'** field
-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

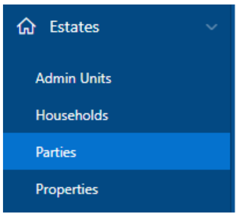


- To create or update the contact details click **'Bulk Row Action'** and then **'Maintain Contact Details'**
- To add a new contact method;
    - Click **'Add Row'**
    - Use the **'Contact Method'** field to select the contact method, enter the number or email address, whether this is a preference 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'**

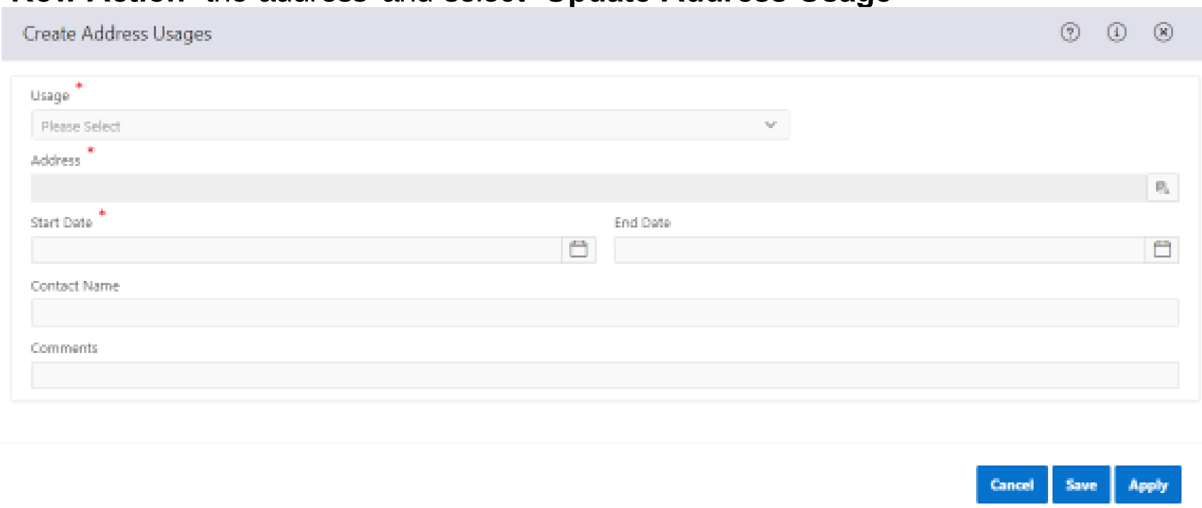
3.6 Create and Update Mailing Addresses

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

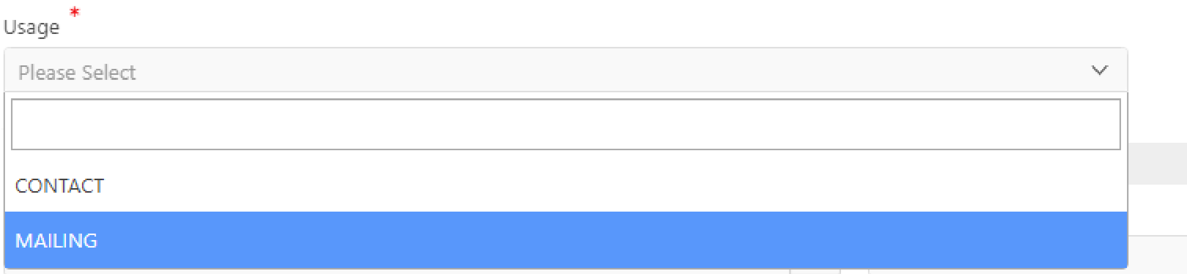


- Click anywhere on their line to enter the Person Details page
- From the banner at the top, click **'More'** and then **'Address Usage'**

- Click **'Create'** and then **'Address Usage'** to create a new mailing address or **'Row Action'** the address and select **'Update Address Usage'**



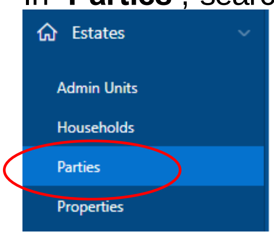
- In the **'Address Usage Field'**, select from the drop down the address usage to use



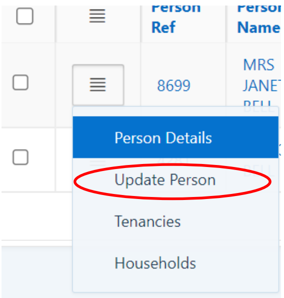
- Click **'Save'**

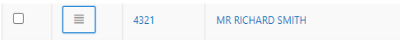
3.7 Create and Update Name Changes

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

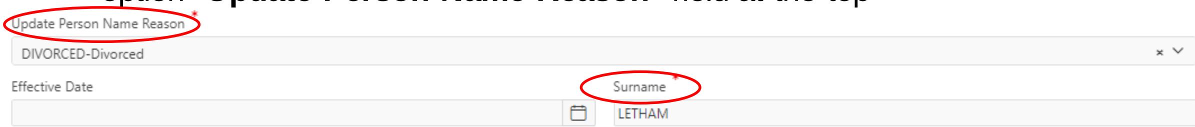


'Row Action' the person who's name needs changed and select **'Update Person'**

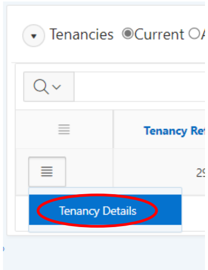




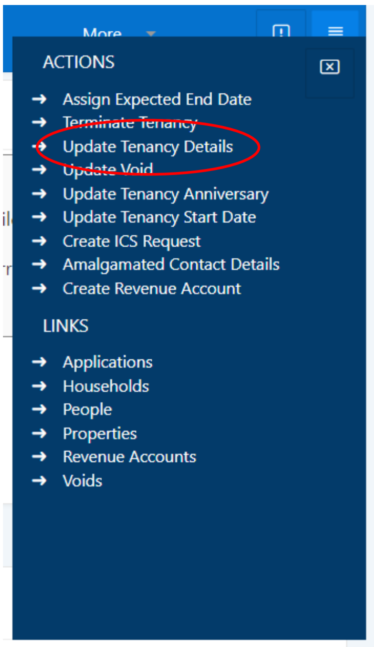
- In the **'Update Person'** wizard, type in a new surname, and then select an option **'Update Person Name Reason'** field at the top



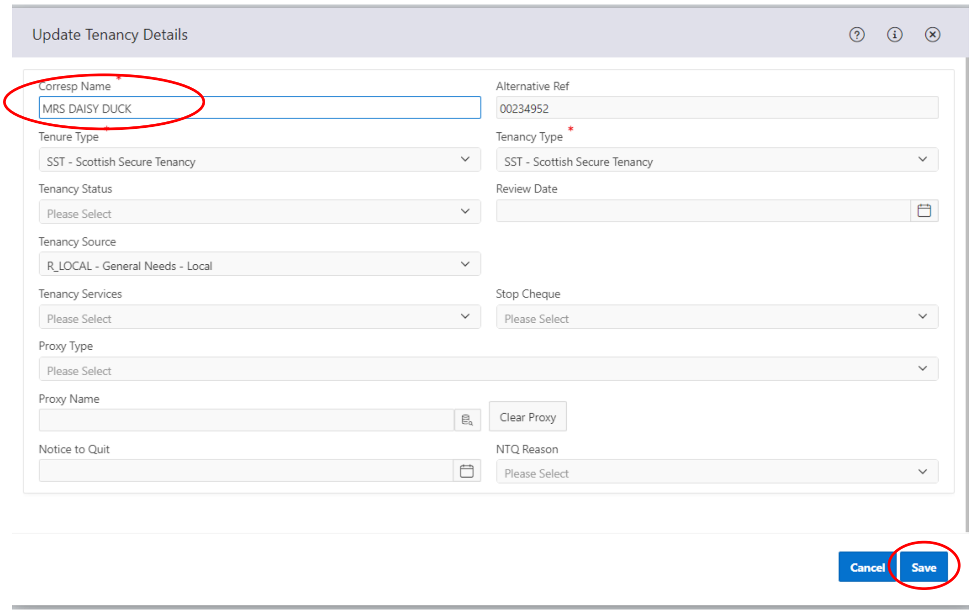
- Once details have been changed, click **'Save'**
- Click **'More'** and then **'Tenancies'**
- **'Row Action'** the current tenancy needing updated and click **'Tenancy Details'**



- Click **'Action'** and click **'Update Tenancy Details'**



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

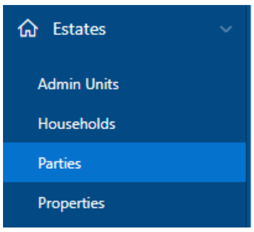


- Click **'Save'**

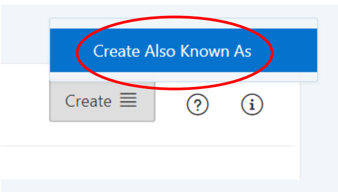
3.8 Aliases

3.8.1 Add Aliases

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



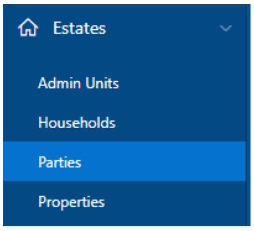
- Select the person you'd like to add an alias for
- Click **'More'** and then **'Also Known As'**
- Click **'Create'** and then **'Create Also Known As'**



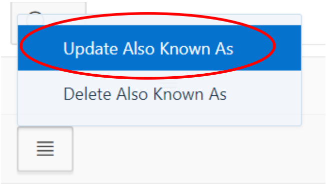
- Complete the **'Create Also Known As'** wizard
- Once details have been changed, click **'Save'**

3.8.2 Update or Remove Aliases

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



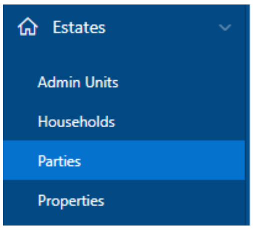
- Select the person you'd like to add an alias for
- Click **'More'** and then **'Also Known As'**
- **'Row Action'** the alias and click **'Update Also Known As'**



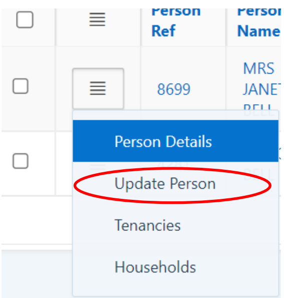
- Update the details on the **'Update Also Known As'** wizard, remembering to enter an end date if the alias has ended.
- Once details have been changed, click **'Save'**

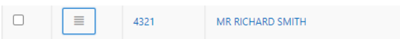
3.9 Add National Insurance Numbers

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

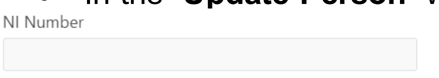


- **'Row Action'** the person who's name needs changed and select **'Update Person'**





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



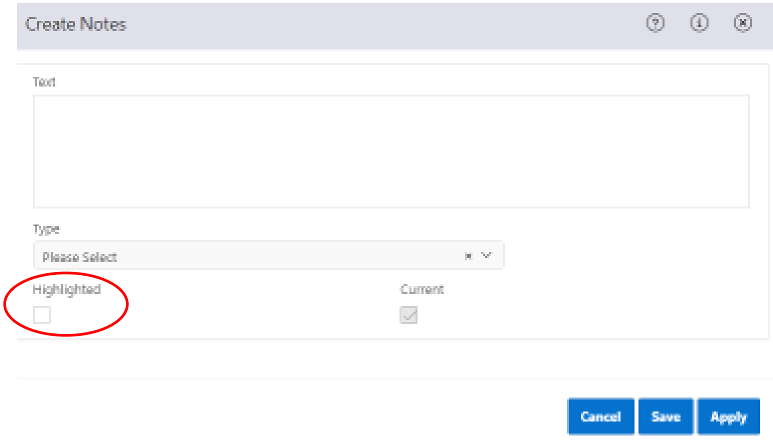
- Once details have been changed, click **'Save'**

3.10 Account Notepad Entry and Warning Messages

3.10.1 Creating a Note and Warning Message

- 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 or to pin the note to the top of the notepad.

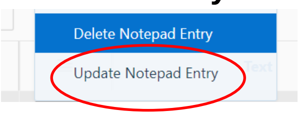


- Click **'Save'**

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.

3.10.2 Updating a Note and Warning Message

- 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'**



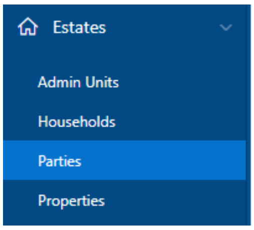
- Here you can update the note text and also untick the '**Highlighted'** section if the note if it is no longer required as a warning or to be pinned.
- Click **'Save'**

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

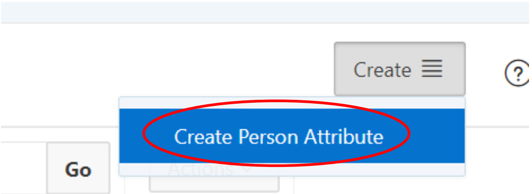
3.11 Person Attributes

3.11.1 Add Person Attributes

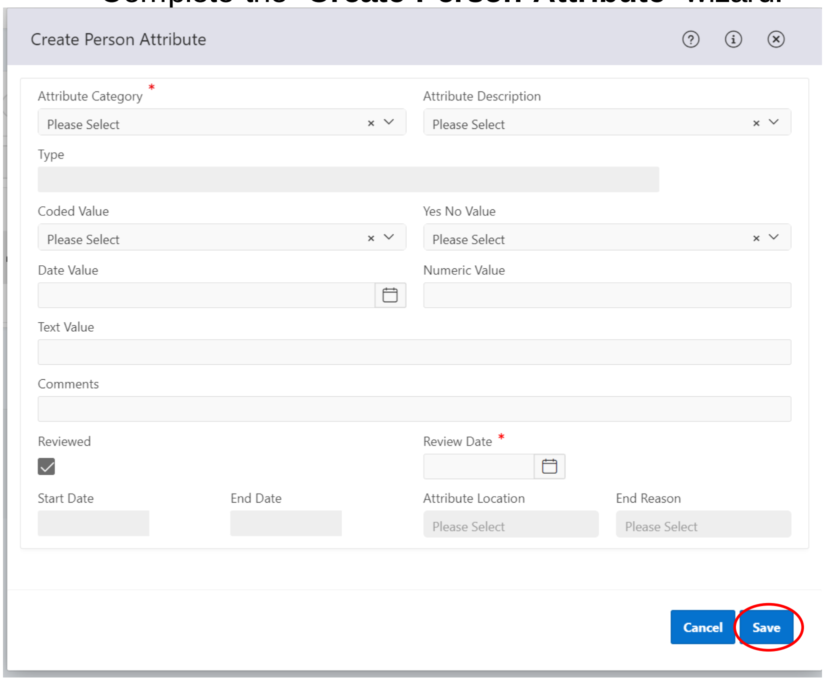
- In **‘Parties’**, search for a record using the search or advanced search options



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



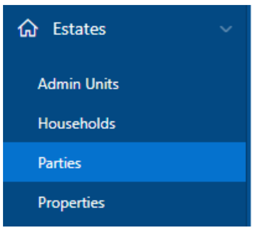
- Complete the **‘Create Person Attribute’** wizard.



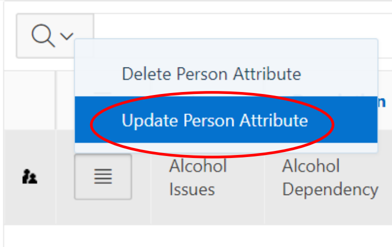
- Click **‘Save’**

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:

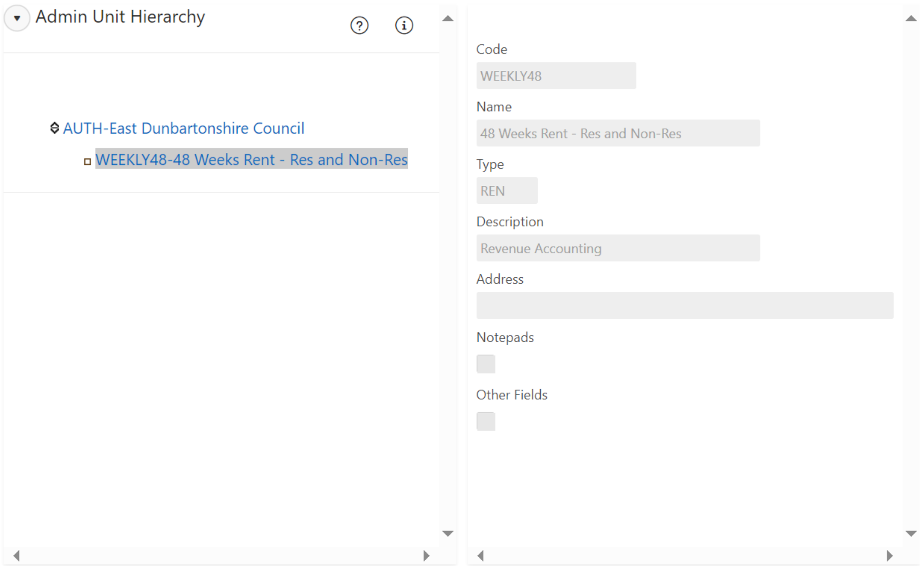
- TOP - Top Level
- OFF - Area Office
- REN - Revenue Accounting
- CPA - Cyclical Programme Area
- MPA - Maintenance Programme Area
- SER - Service Charge Admin Unit

Other examples (user-defined):

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

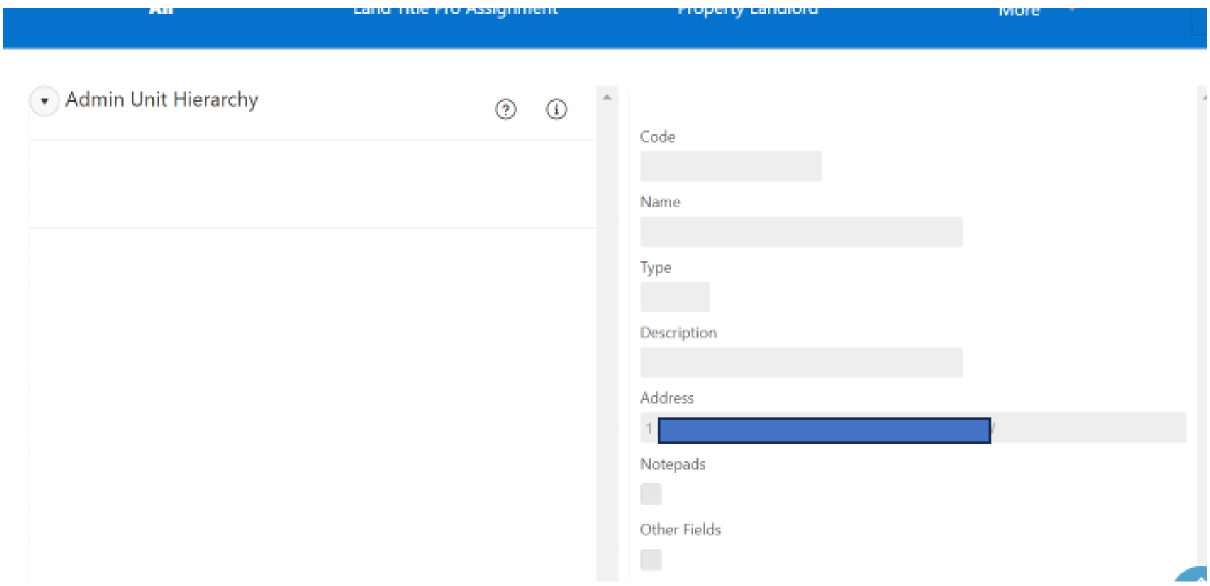
4.3 Viewing the Hierarchy of an Admin Unit

- 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.



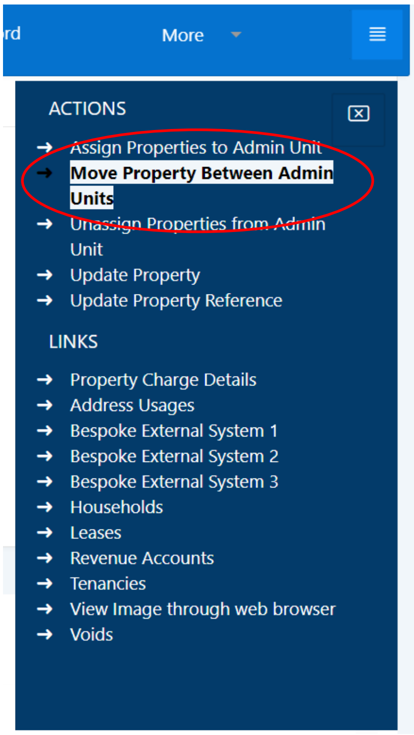
4.4 Viewing the Admin Unit Hierarchy for a Property

- In **‘Properties’**, search for a record using the search or advanced search options
- Select the property who’s 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.

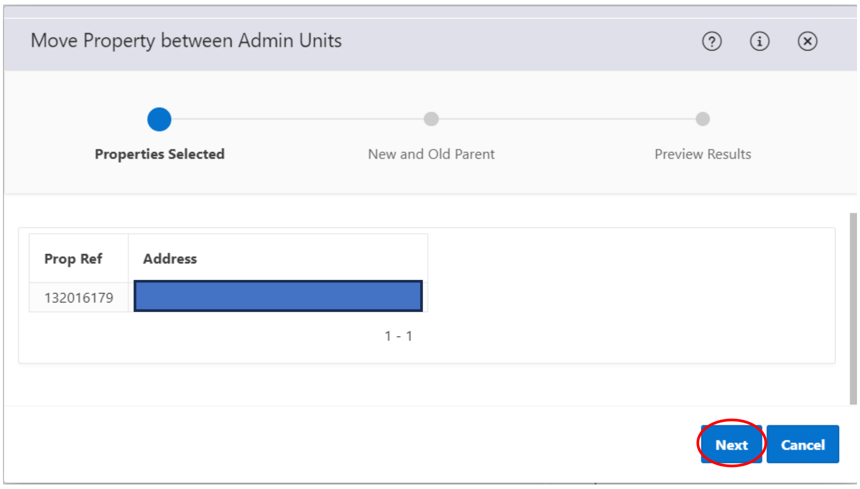


4.5 Moving a Tenancy Between Admin Units

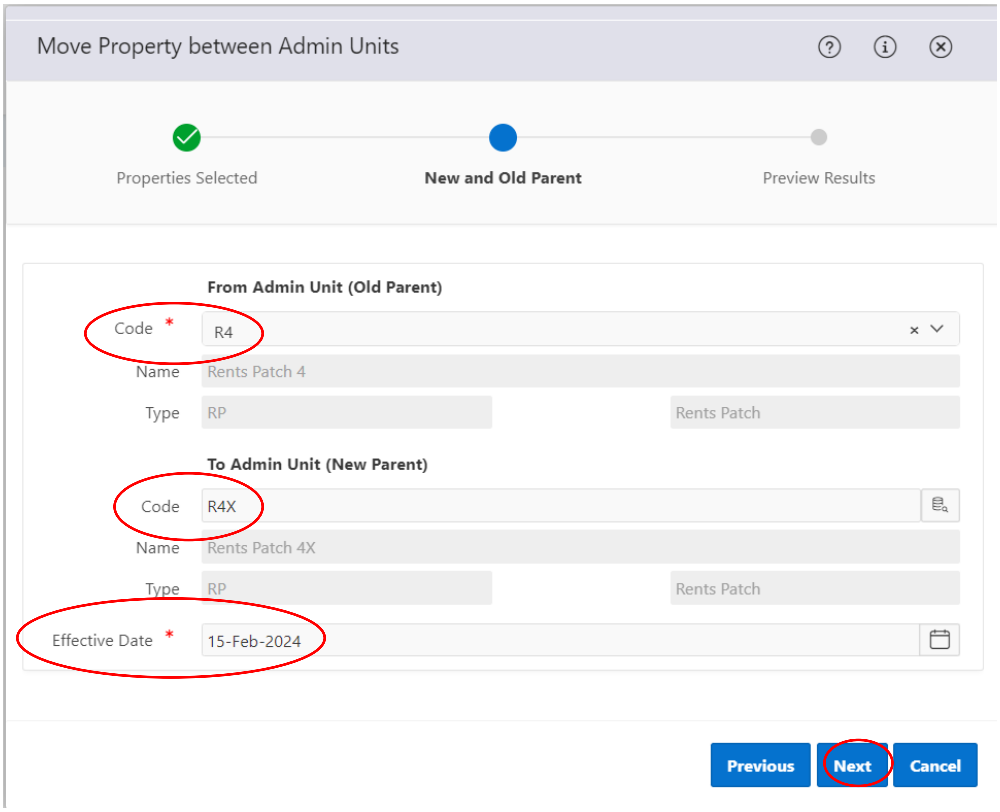
- In **'Properties'**, search for the rent account using the search or advanced search options
- Select the address you would like to update
- Click **'Actions'** in the top right-hand corner and then **'Move Property Between Admin Units'**



- 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. Property Management

5.1 Key Terms: Properties

Street Index / Code

A unique code identifying an address, for example, the street name, area, and county.

Property Type / Sub Type

Codes describing if the type of property, for example, if the property is a house or a flat and if the property is detached, semi-detached, terrace etc. The property type can have restrictions set for associated tenancies, for example, minimum notice period or must have notice before terminating.

Element

An element is used to hold additional information against an object. For example, description of a property -bedrooms, heating type, roof windows etc.

Attribute

An attribute is an additional description of an element. For example:

Element	Attribute
BEDSIZEDBL	1
DWELLING	1ET
RENT_48W	86.01

Attribute Type

There are four system defined attribute types: Number, Coded, Date and Multivalue.

Multivalue elements mean the same element code can be used more than once for a property. However, the attribute associated with the element can only be used once. For example:

Element	Attribute
BEDS	1
NEEDS_TYPE	NT_SHELTER
	NT_GEN
	NT_AMENITY
LOFT_CONV	LOFTCV_YES
	LOFTCONV_N

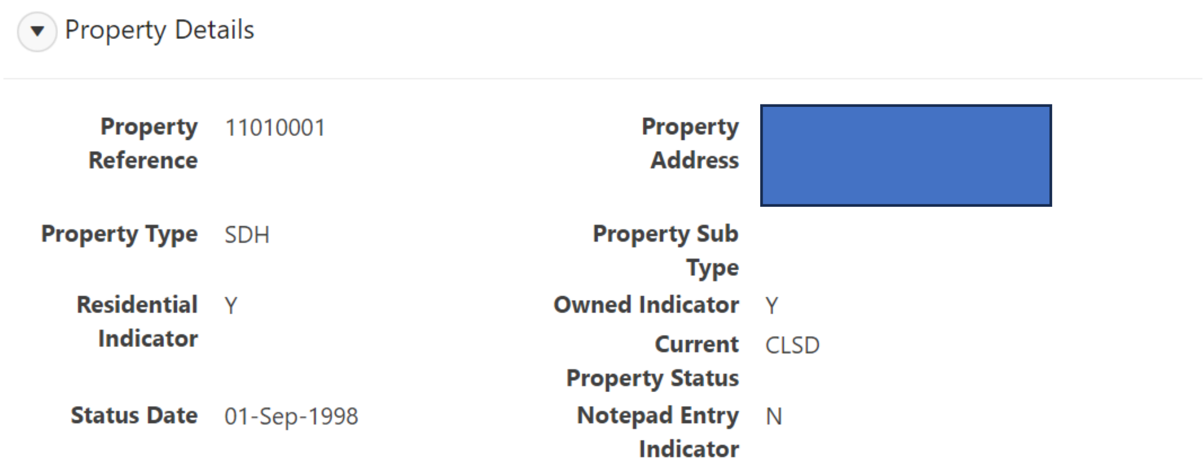
Element Groups

Elements can be grouped together. For example, key data, allocations data.

Property Elements and Attributes

Element	Attribute	Further Attribute	Type
RENT_48W			Number
ROOF	Asphalt / Slate / Concrete		Code
HEATING			Code
ADAPT_TYPE	AT_RAMP		Code
Boiler Type	Glow Worm		Code
BEDS	3		Number
SMOKE_ALRM	20-APR-2008		Date
Garden	GRDN_YES/ GRDN_NO		Code
CONSTRUCT	CON_TRAD		Code

5.2 Property Details


Property Details

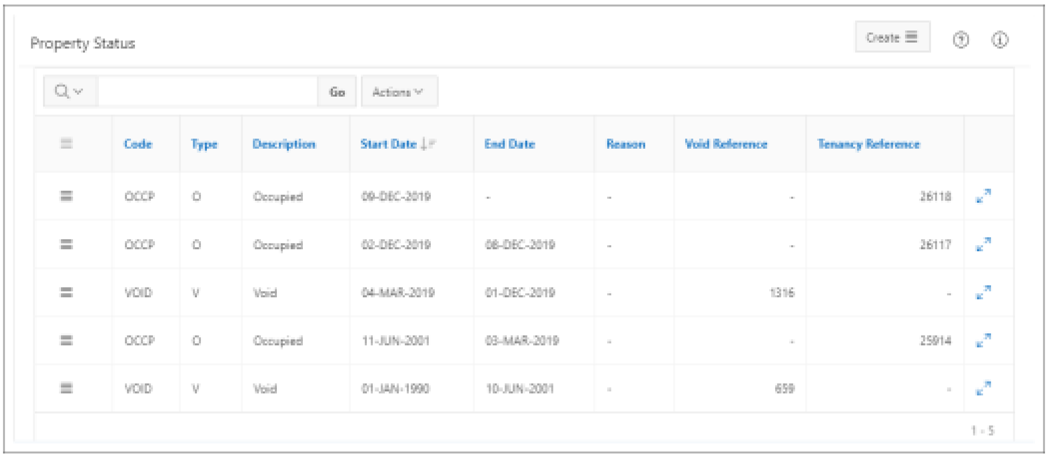
Property Reference	11010001	Property Address	[redacted]
Property Type	SDH	Property Sub Type	
Residential Indicator	Y	Owned Indicator	Y
		Current Property Status	CLSD
Status Date	01-Sep-1998	Notepad Entry Indicator	N

***Figure 1:** Example of the Property Details page*

5.3 Viewing Property Statuses

- In **'Properties'**, search for a record using the search or advanced search options
- Select the property whose property status you'd like to check

- Click **'More'** and then 'Property Status'
- The property status information is displayed



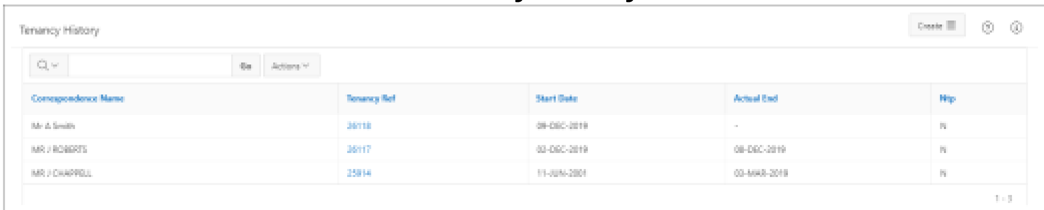
Property Status

	Code	Type	Description	Start Date	End Date	Reason	Void Reference	Tenancy Reference
	OCCP	O	Occupied	09-DEC-2019	-	-	-	26118
	OCCP	O	Occupied	02-DEC-2019	08-DEC-2019	-	-	26117
	VOID	V	Void	04-MAR-2019	01-DEC-2019	-	1316	-
	OCCP	O	Occupied	11-JUN-2001	03-MAR-2019	-	-	25914
	VOID	V	Void	01-JAN-1990	10-JUN-2001	-	659	-

1 - 5

5.4 Viewing Tenancy History

- In **'Properties'**, search for a record using the search or advanced search options
- Select the property whose tenancy history you'd like to check
- Click **'More'** and then **'Tenancy History'**



Tenancy History

Correspondence Name	Tenancy Ref	Start Date	Actual End	Htp
Mr A Smith	26118	09-DEC-2019	-	N
MR J ROBERTS	26117	02-DEC-2019	08-DEC-2019	N
MR J CHAPPELL	25914	11-JUN-2001	03-MAR-2019	N

1 - 3

- The tenancy history information is displayed

6. Void Management

6.1 Void Components

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

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

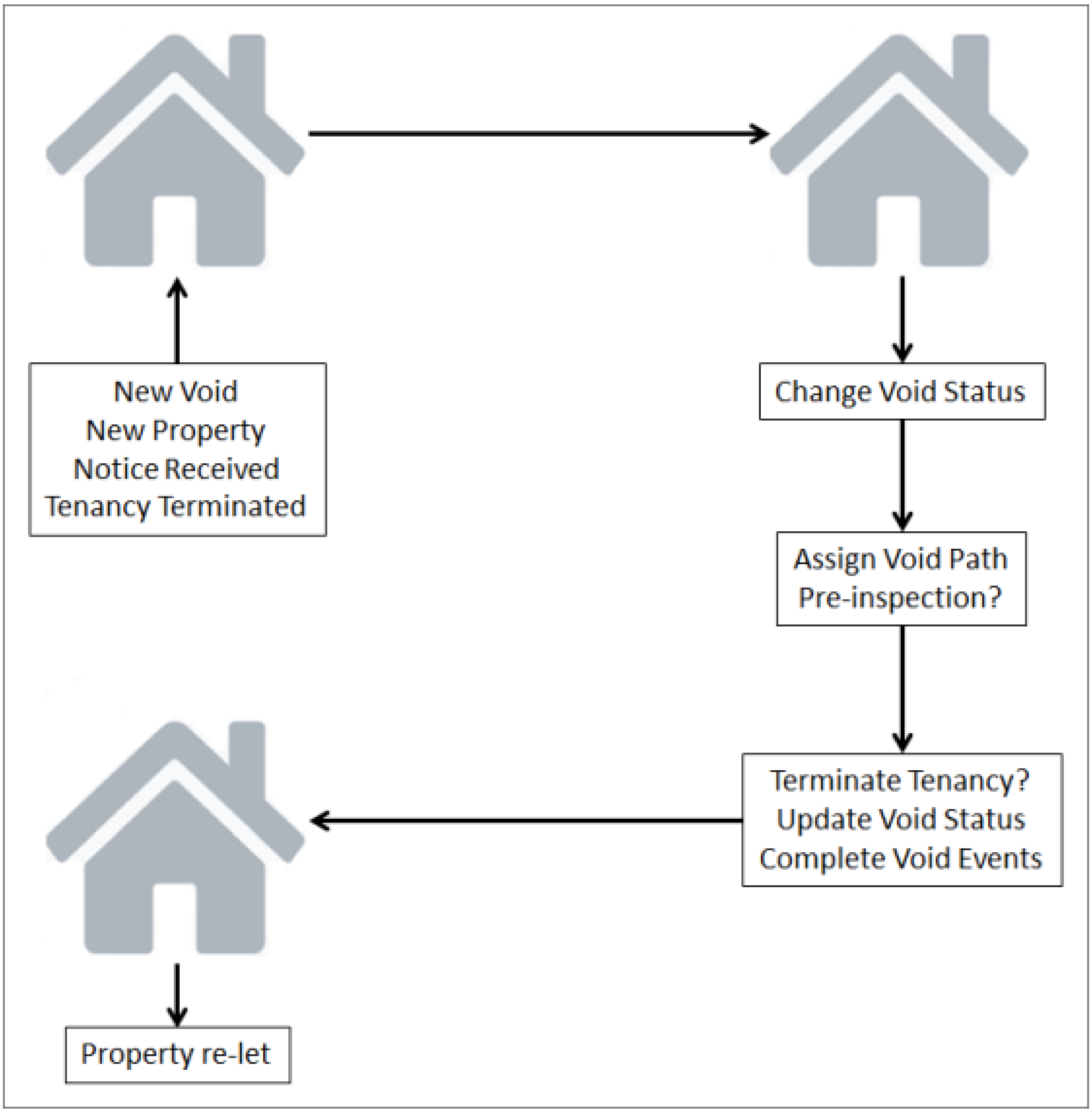
Void Events

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

Void Stages

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

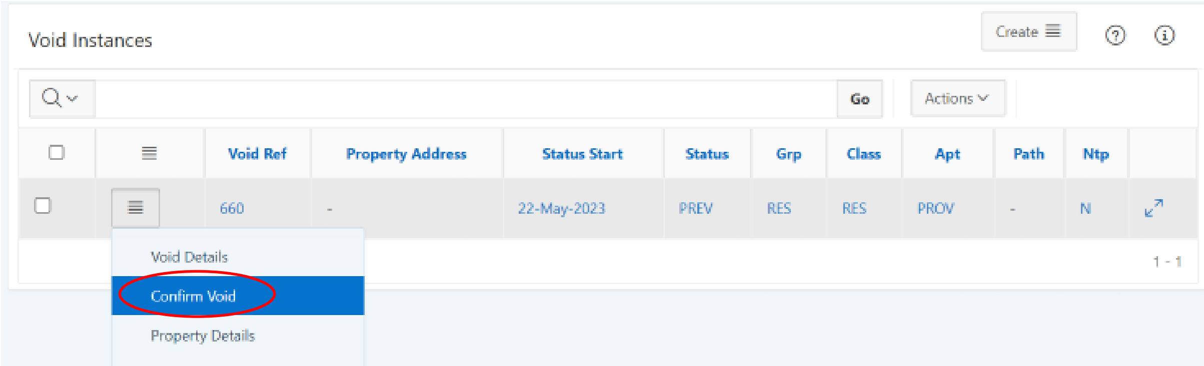
6.2 Void Cycle



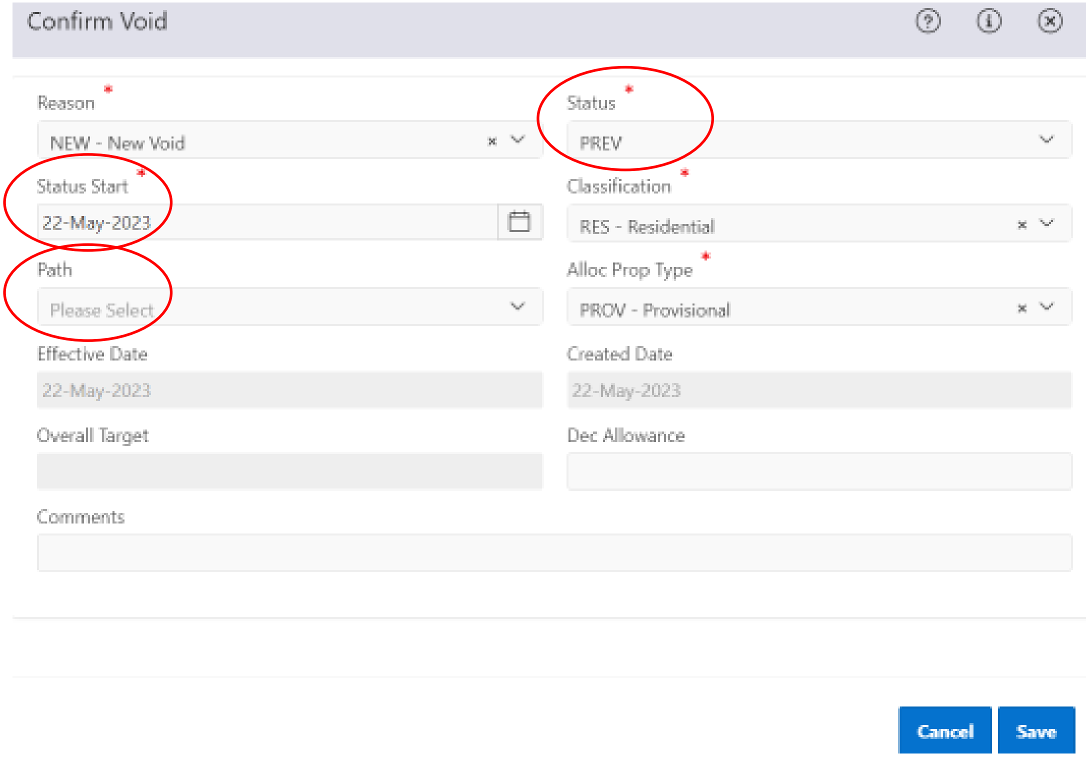
6.3 Confirm Voids

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

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



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



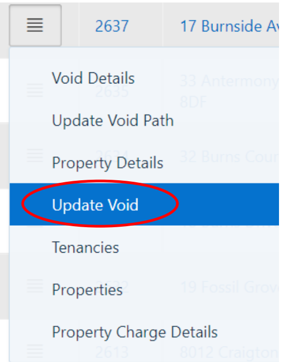
- Click **'Save'**

6.4 Update Voids

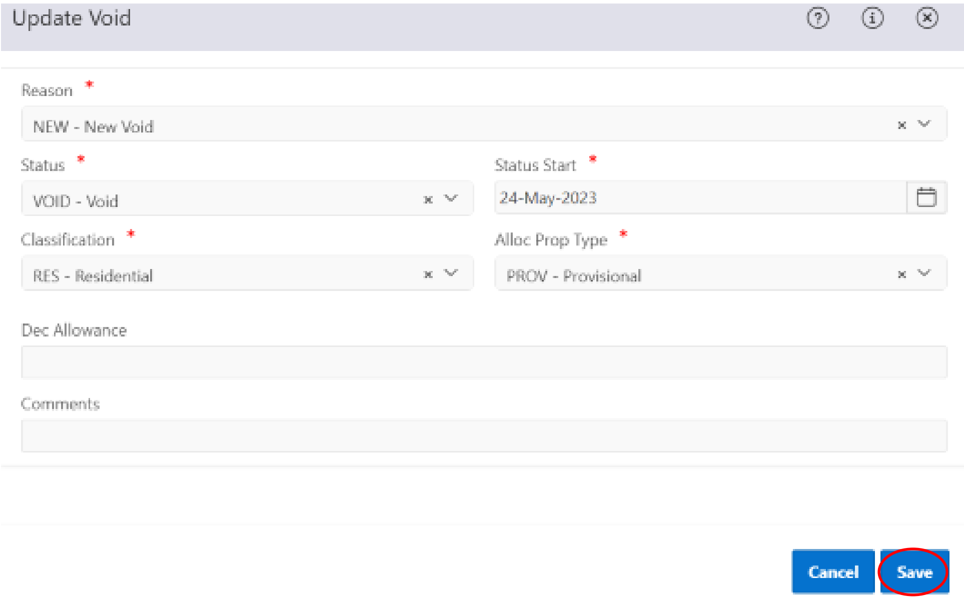
Note:

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

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



- Complete the **'Update Void'** wizard



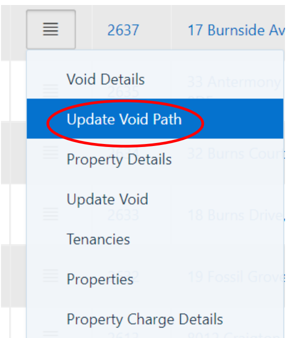
- Click **'Save'**

6.5 Update Void Paths

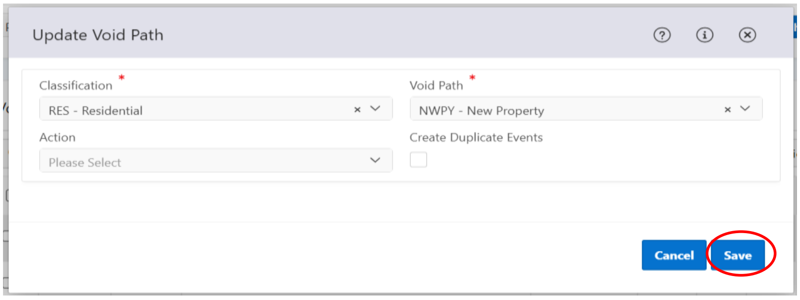
Note:

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

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



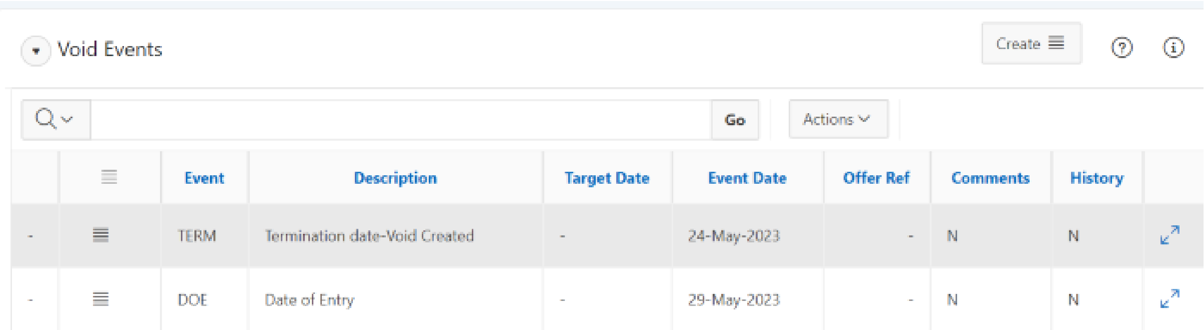
- Complete the **‘Update Void Path’** wizard



- Click **‘Save’**

6.6 View Void Events

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

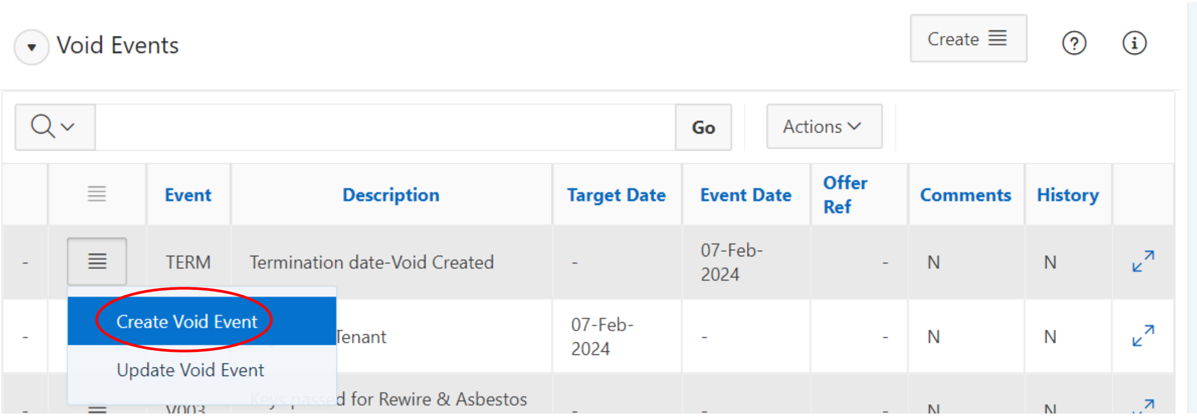


		Event	Description	Target Date	Event Date	Offer Ref	Comments	History	
-		TERM	Termination date-Void Created	-	24-May-2023	-	N	N	
-		DOE	Date of Entry	-	29-May-2023	-	N	N	

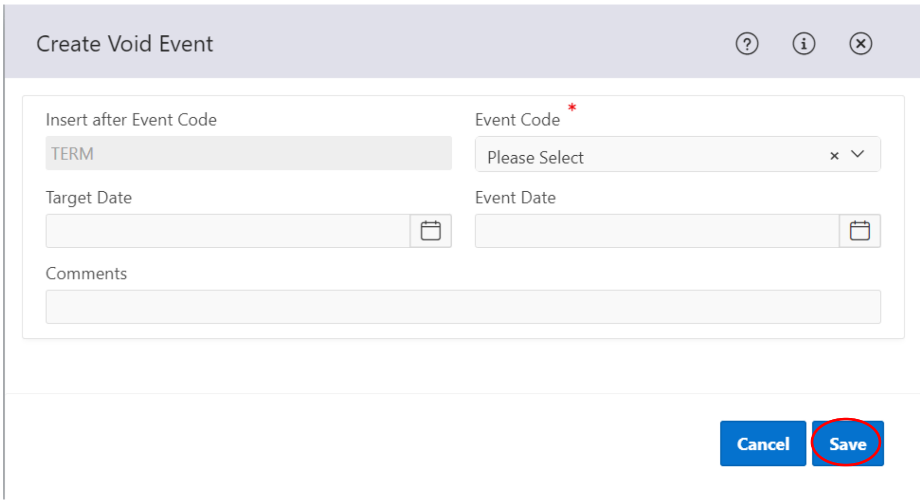
6.7 Create Void Events

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

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



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



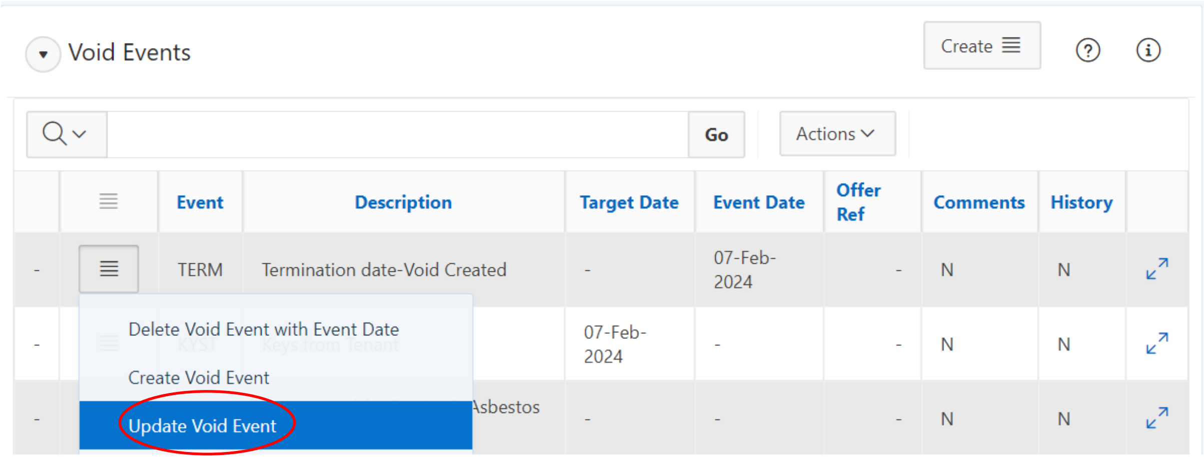
- Click **'Save'**

6.8 Update Void Events

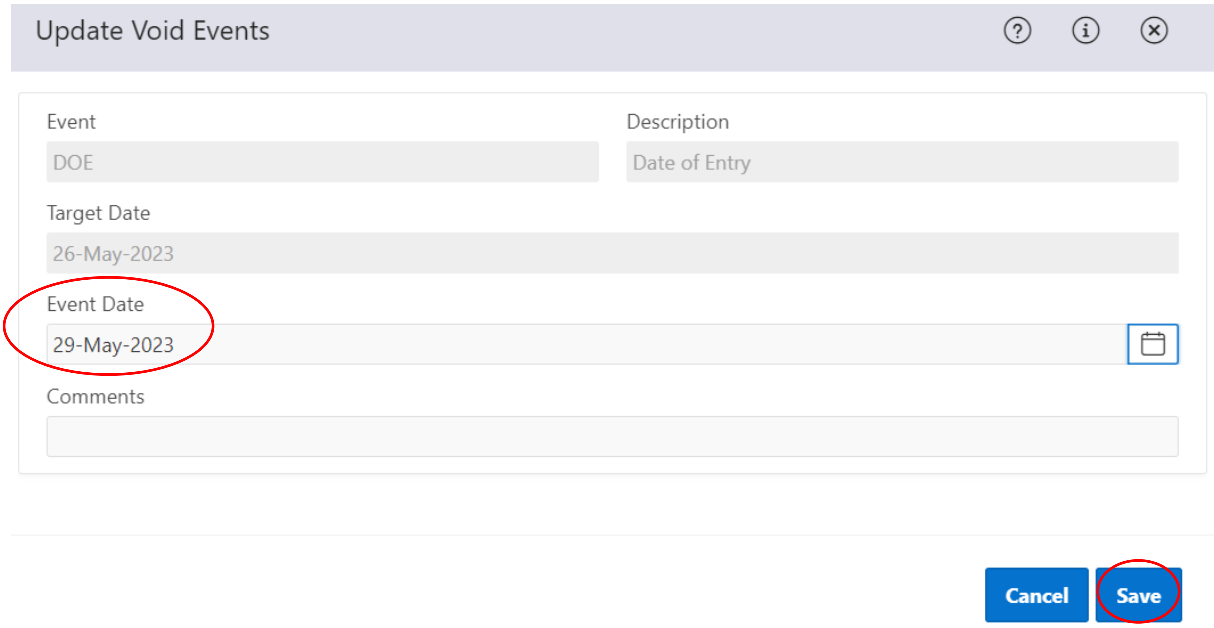
Note:

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

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



- Complete the **‘Update Void Event’** wizard by entering the event date and comments if required.

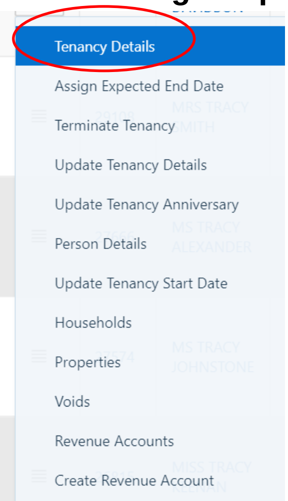


- Click **‘Save’**

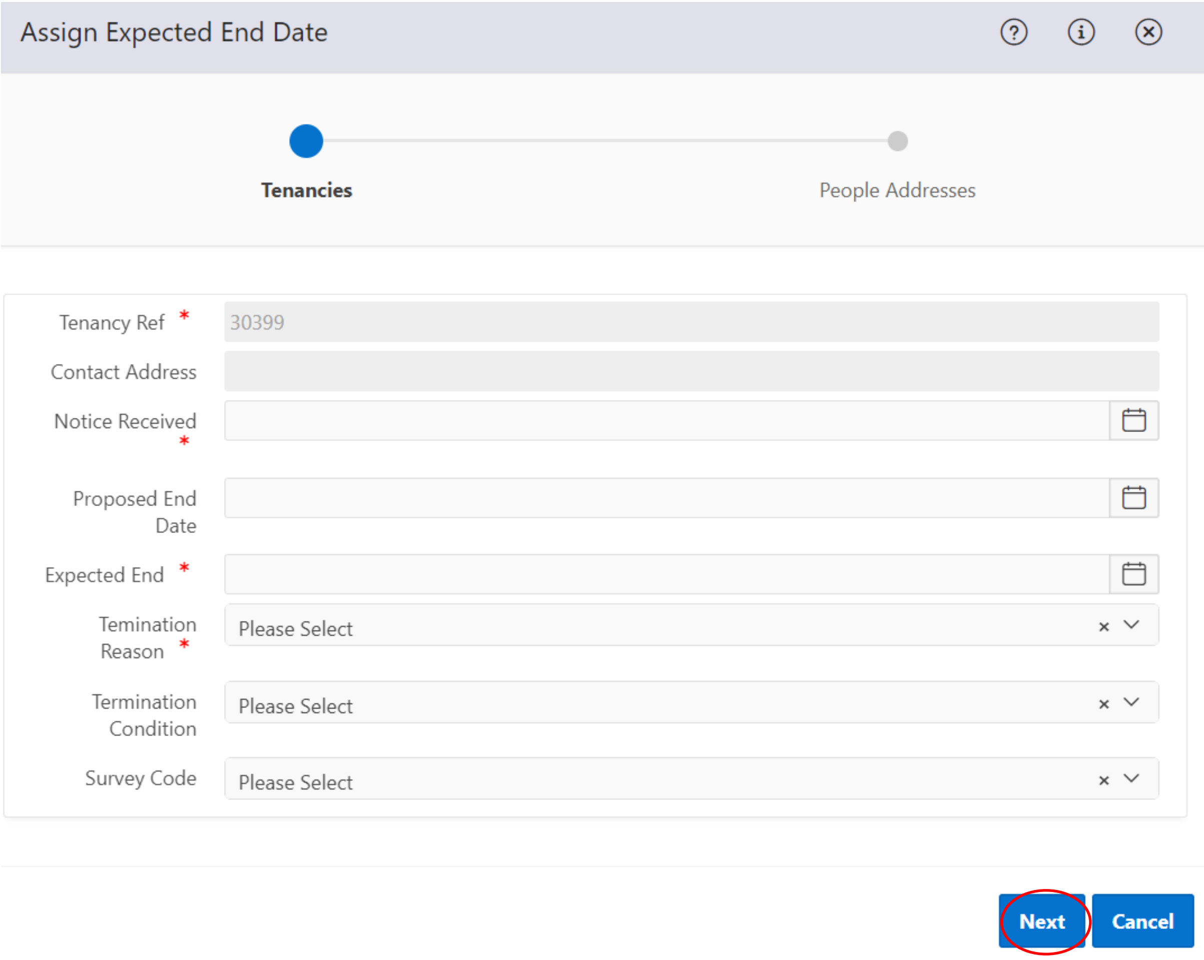
7. Tenancy Management

7.1 Assigning Expected Tenancy End Dates

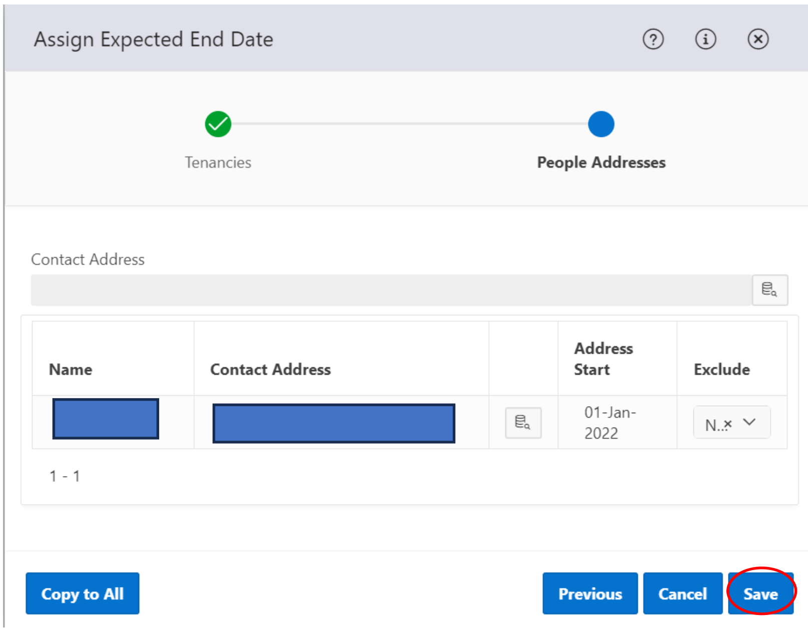
- In **'Tenancies'**, search for the tenancy using the search or advanced search options
- **'Row Action'** the tenancy you want to add the expected end date to and click **'Assign Expected End Date'**



- Complete the '**Assign Expected End Date'** wizard by entering the information required in the **'Tenancies'** page.



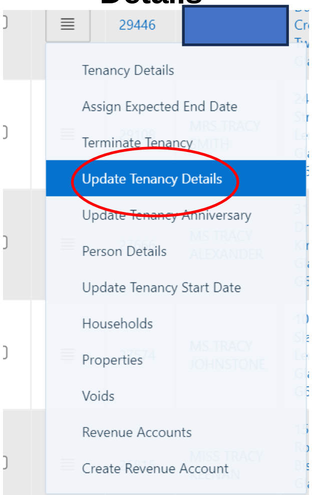
- Click **'Next'**
- Complete the **'People Addresses'** page by providing the new contact address for the household members if known.



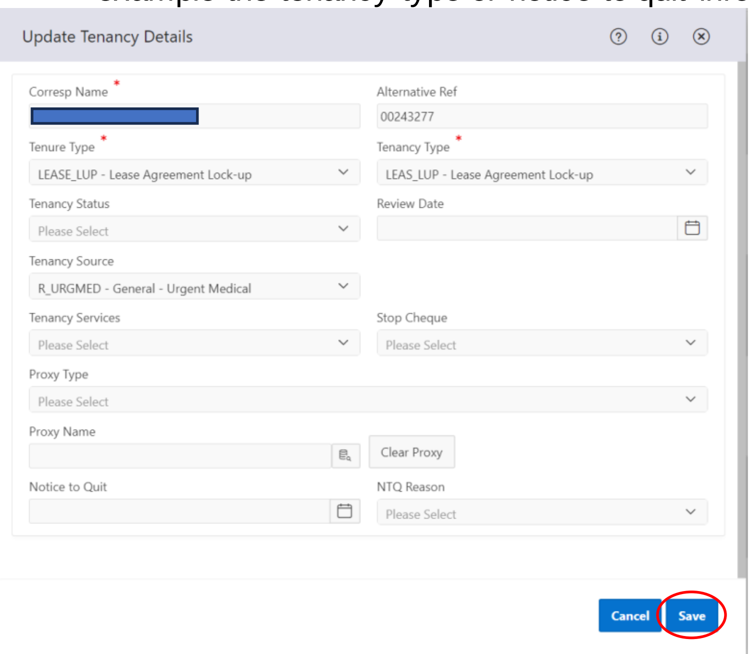
- Click **'Save'**

7.2 Updating Tenancy Details

- In **'Tenancies'**, use the basic or advance search to find a tenancy
- **'Row Action'** the tenancy you want to update and click **'Update Tenancy Details'**



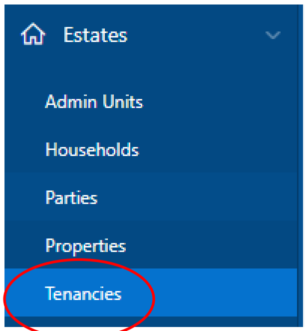
- Update any details of the tenancy in the **'Update Tenancy Details'** wizard, for example the tenancy type or notice to quit information.



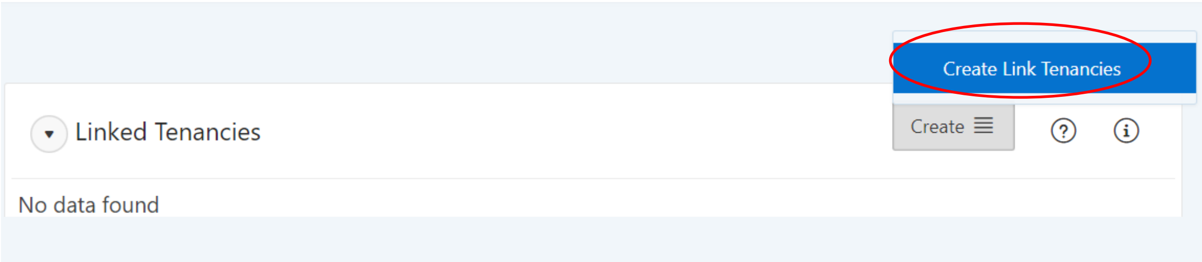
- Click **'Save'**

7.3 Linking Current Tenancies

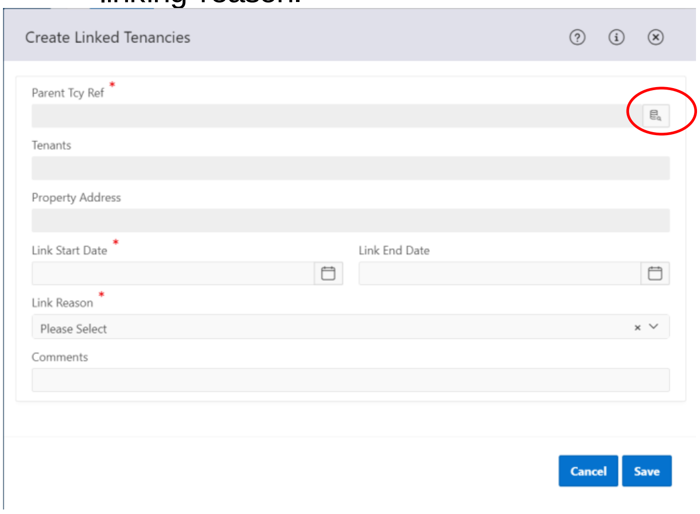
- In **'Tenancies'** search for a record using the search or advanced search options



- 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.



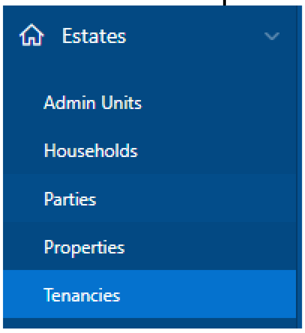
- Click **'Save'**

Note: *Rules for linking:*

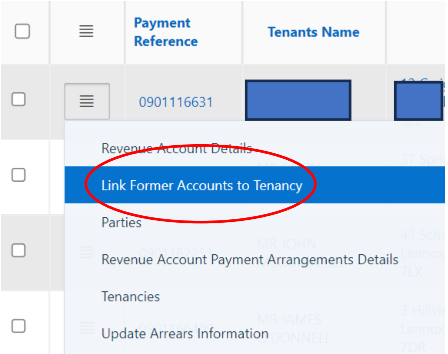
- *The tenant must have at least one Terminated Tenancy with an associated account and one Current Tenancy with a current account.*
- *You can link any account types to the Current Tenancy e.g. Rent Account, Court Costs, Rechargeable Account, Insurance Account.*
- *Linking will NOT transfer account balances automatically however balance transfers from former to current accounts can be applied later.*
- *Non-Tenant Sundry Accounts cannot be linked.*

7.4 Linking Former Accounts to Tenancies

- In **'Revenue Accounts'** search for a record using the search or advanced search options



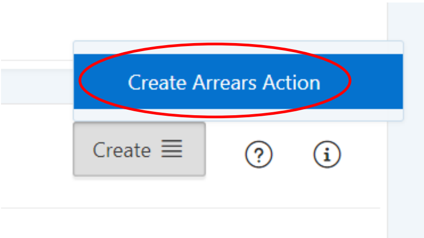
- Select the former account you want to link
- **'Row Action'** and the click **'Link Former Accounts to Tenancies'**



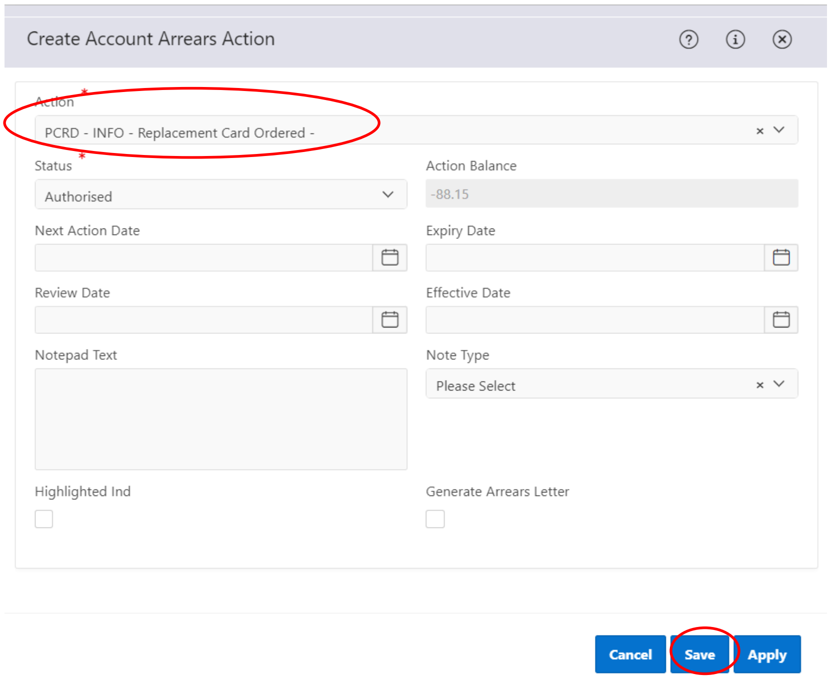
- Complete the **'Link Former Accounts to Tenancy'** wizard with all the relevant data.
- Click **'Save'**

7.5 Ordering a New Rent Card

- In **'Revenue Accounts'**, search for a record using the search or advanced search options
- Select the rent account you want to order a new rent card for
- Click **'More'** and then **'Arrears Actions'**
- Click **'Create'** and then **'Create Arrears Action'**



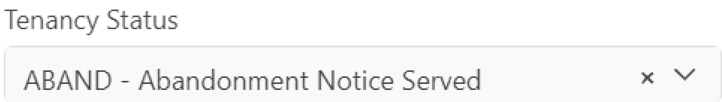
- Complete the **'Create Arrears Action'** wizard by selecting **'PCRD – INFO – Replacement Card Ordered'**, put the status as **'Pending'** and add some text to the **'Notepad Text'**



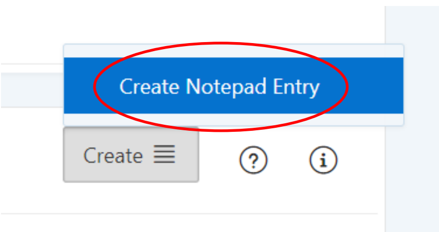
- Click **'Save'**

7.6 Abandonment Notices

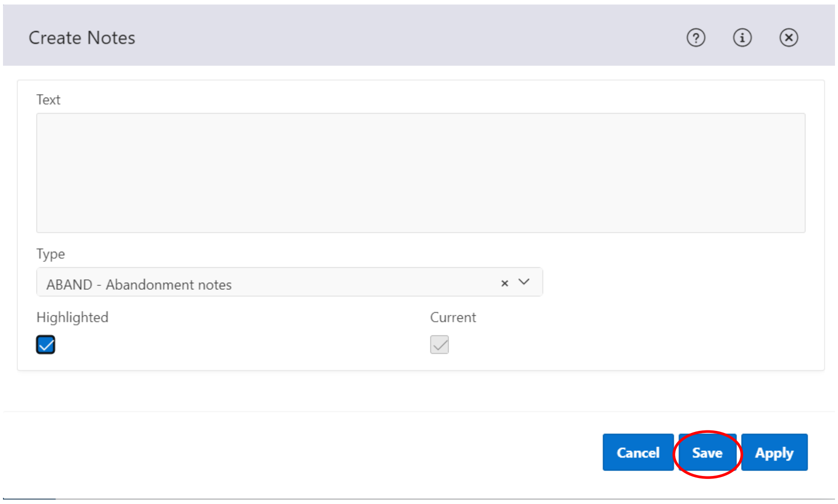
- In **'Tenancies'**, search for a record using the search or advanced search options
- **'Row Action'** the account you want to add the notice to and click **'Update Tenancy Details'**
- On **'Tenancy Status'** from the drop down select the **'ABAND – Abandonment Notice Served'** and enter a review date of when the notice ends.



- Click **'Save'**
- Select the tenancy, click **'More'** and then **'Notes'**
- Click **'Create'** and then **'Create Notepad Entry'**



- Add a note to the tenancy account from the note type **'Aband – Abandonment Notes'** and highlight this note to populate the warning message.


Create Notes
Text
Type
ABAND - Abandonment notes
Highlighted
Current
Cancel
Save
Apply

- Click **'Save'**

8. Housing Support Referrals

Please refer to Support Services user guide.

9. 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.