Housing Advice User Guide

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- Maintain Advice Case Addresses.
- NEC Housing Options
- Completing Applications.
- Recording Advice Case Associations.

1.1 Overview of NEC Housing Advice

NEC Housing Advice provides the ability to record, monitor and progress NEC Housing advice cases. NEC Housing advice cases may either reflect one-off advice that has been given or they may be opened for casework. User-defined reasons for the client seeking advice may be recorded, for example.

- Harassment.
- Domestic Violence.
- Repairs.
- Homelessness.

More than one reason may be assigned to an advice case. Depending on the reasons for seeking advice different questions can be presented to the Advisor. These questions can be structured so that the next question or set of questions can vary according to answers given. Structuring the questions will not only ensure the right information is obtained from the client but can also assist the Advisor to give the correct advice or suggest relevant NEC Housing options. Questions and answers may also be linked via a hyperlink to alternative sources of information such as useful websites or internal policy/information documents. The user who is giving the advice can then easily access these additional sources of information directly from the NEC Housing Advice module. Questions may be answered over a period of time as the casework progresses.

Casework events can also be recorded as they occur - for example.

- Meetings.
- Interviews.
- Telephone conversations, etc.

Against casework events it is possible to record the people involved in the event and whether the casework event is regarded by the caseworker as ‘direct intervention’ in preventing or delaying the client becoming homeless.

Advice Cases may be associated with Tenancies, Applications and Business Actions as the case progresses.

When a NEC Housing advice case is closed one or more reasons for closing the case must be recorded together with free text comments. These reasons, known as outcomes, can reflect not only how the client was helped, such as by being given a rent deposit, but also the fact that homelessness had been prevented or delayed. Outcomes can be configured to require authorisation.

Once a case is closed it may be reopened although security may be applied to restrict this function. Cases may also be put on hold.

There is also the ability to record prevention payments and to maintain registers of properties available for rent in the private sector. Prevention payments are payments linked to an advice case and made to either:

- The client.
- The landlord.
- Another organisation or another party.

  Payment types are user defined such as:

- Rent deposit.
- Damages deposit.
- Removal expenses etc.

Simple budgets may also be set up and it is possible to view the payments made against a budget and funds still available. Payment types can be flagged as repayable, and a review date set against a prevention payment that will flag to the user when the payment needs to be recovered. Sundry accounts can be automatically created at the appropriate time for repayable payments and the money received back is recorded as adjustments against the sundry account.

Also available is the ability to maintain one or more registers of properties available to rent in the private sector. These may be properties where a rent deposit scheme is in operation. These properties may simply be held as addresses on the database and functionality is available to allow property elements to be assigned to these addresses to capture property information such as the number of bedrooms, bedspaces etc. It is also possible to hold landlord details.

These privately rented properties may be linked to advice cases as private lettings with a letting start date, expected end date and actual end date. This enables the availability of these properties to be visible from within the NEC Housing Advice module.

Note: The NEC Housing Advice module is not intended to progress cases of homelessness (these will still be progressed using existing functionality in Allocations) but it will enable all instances of NEC Housing advice to be recorded and where that advice results in a new application being created, it can be done so automatically using the details captured in NEC Housing Advice without the need to re-enter any data.

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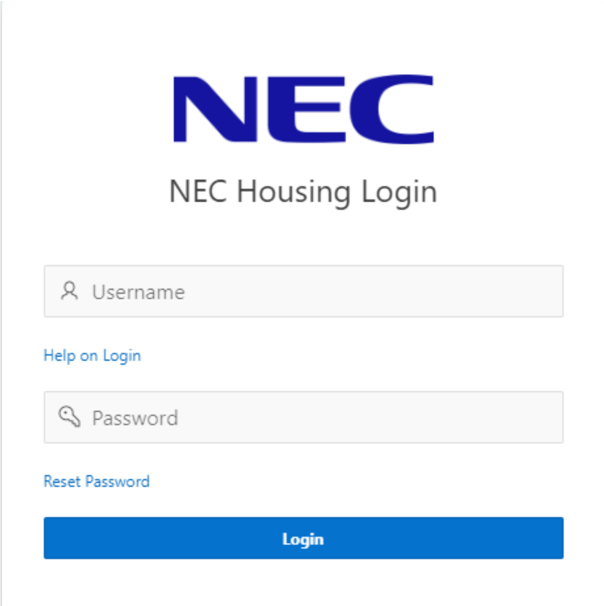
2. Accessing NEC Housing

1. Navigate to the NEC Housing site.

The Login page appears.

2. Enter your Username and Password.



3. Click Login.

You are now logged into the NEC Housing application.

2.1 Accessing NEC Housing Advice

To complete these tasks, perform the following steps.

1.Select NEC Housing.

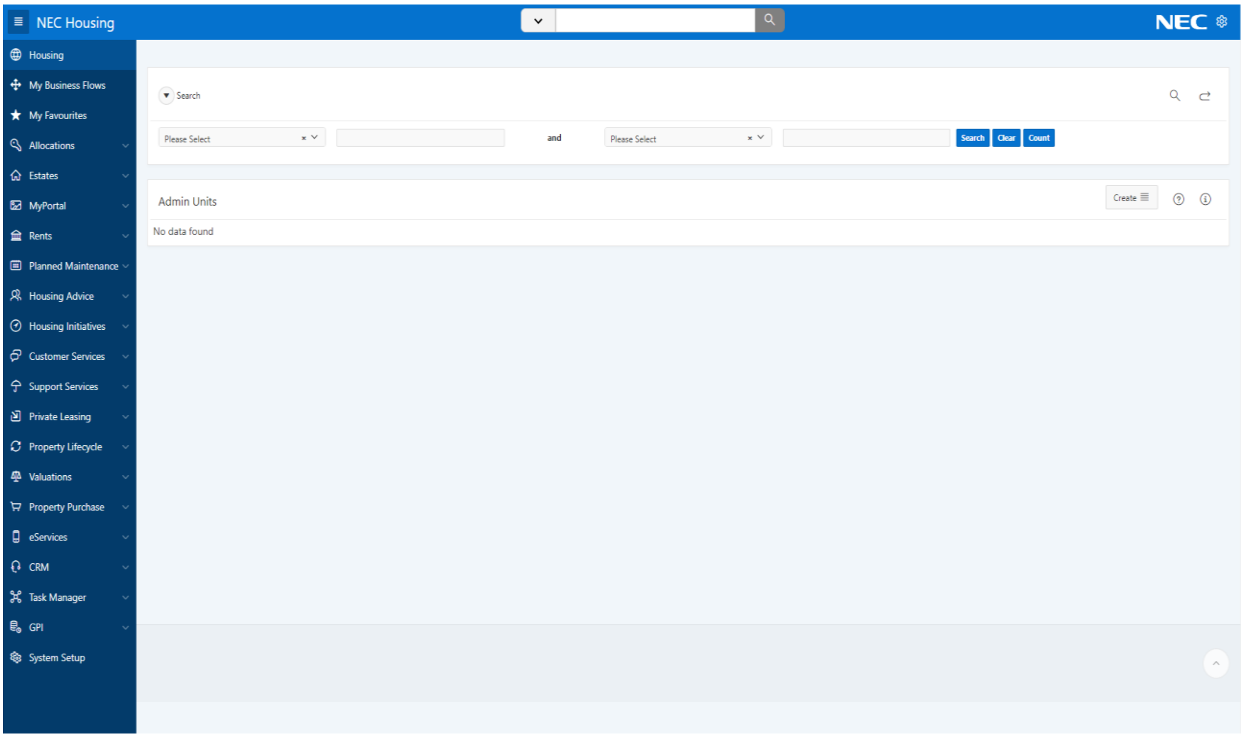
It is likely that this will be set to the default option subject to the Security configuration for the User.

The screen displays the System Setup Area tabs at the top, Product Areas in the banner immediately below the tabs and the Business Areas beneath the selected product.

2. Click on the NEC Housing Advice product area

Tip: the colour of the name for the product area you are in will change as you navigate to that area.

The following is an example:


NEC Housing
NEC
Housing
My Business Flows
My Favourites
Allocations
Estates
MyPortal
Rents
Planned Maintenance
Housing Advice
Housing Initiatives
Customer Services
Support Services
Private Leasing
Property Lifecycle
Valuations
Property Purchase
eServices
CRM
Task Manager
GPI
System Setup
Search
Please Select
and
Please Select
Search
Clear
Count
Admin Units
Create
No data found

3. System Icons

Icon	Description
	Click the **Main Row Action** icon to view a list of different areas within the system. (THE BURGER)
More	Click the **More Chevron** icon to access the business and functional areas of the application.
	Click the **Row Action** icon to access a list of values from which you can select an action to perform.
Create	Click the **Create** icon to open the form or wizard used to create a 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

4. Pages

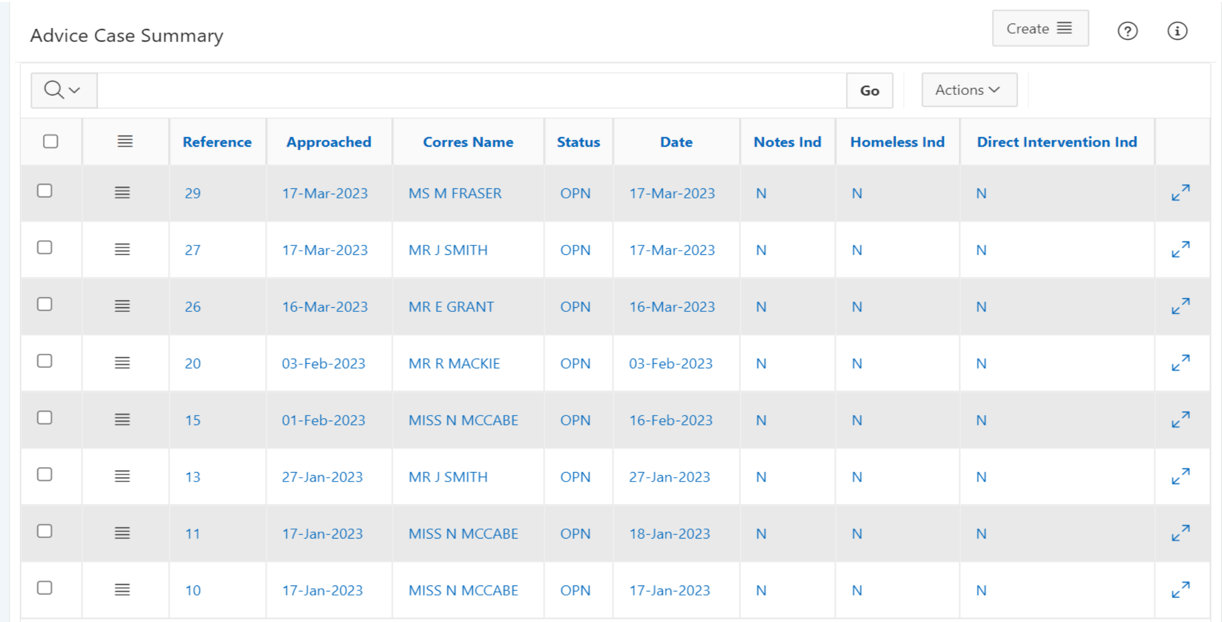
Pages are used throughout the NEC Housing application to provide access to business areas and functionality.

There are number of different types of pages, namely:

- Summary Pages.
- Advanced Search Pages.
- Details Pages.

4.1.1 Summary Page

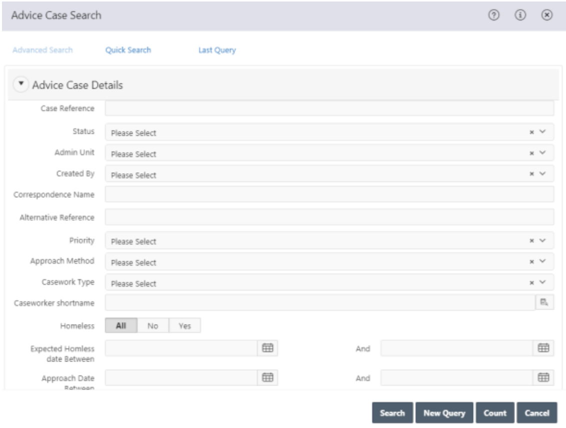
This is an example of a Summary Page.



Reference	Approached	Corres Name	Status	Date	Notes Ind	Homeless Ind	Direct Intervention Ind
29	17-Mar-2023	MS M FRASER	OPN	17-Mar-2023	N	N	N
27	17-Mar-2023	MR J SMITH	OPN	17-Mar-2023	N	N	N
26	16-Mar-2023	MR E GRANT	OPN	16-Mar-2023	N	N	N
20	03-Feb-2023	MR R MACKIE	OPN	03-Feb-2023	N	N	N
15	01-Feb-2023	MISS N MCCABE	OPN	16-Feb-2023	N	N	N
13	27-Jan-2023	MR J SMITH	OPN	27-Jan-2023	N	N	N
11	17-Jan-2023	MISS N MCCABE	OPN	18-Jan-2023	N	N	N
10	17-Jan-2023	MISS N MCCABE	OPN	17-Jan-2023	N	N	N

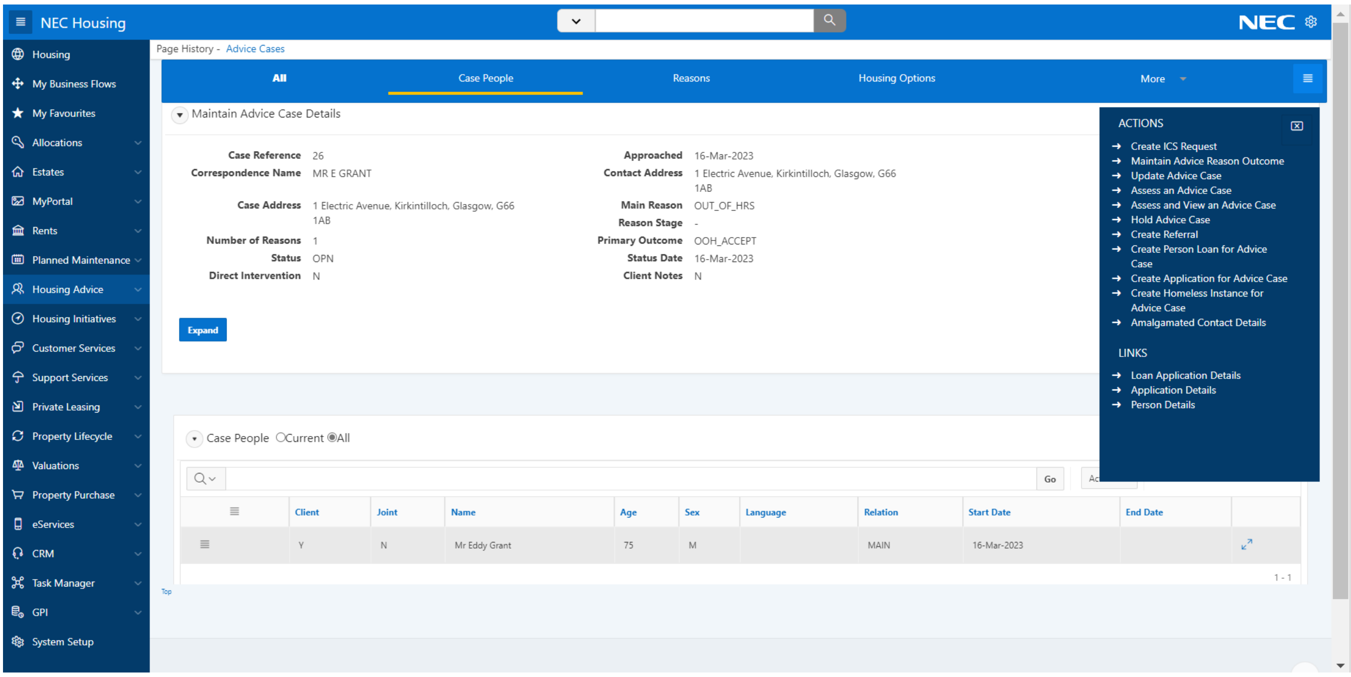
4.1.2 Advanced Search Page

This is an example of an Advance Search Page.



4.1.3 Details Page

This is an example of a Details Page.



4.2 Search Sub Region

The simple Search subregion appears above the region on each of the summary pages within a product area. It is used to populate those regions with the records that meet your search criteria.

When you first access the main page within any product area you will need to retrieve the records you want from the database. This is done by entering your search criteria in the Search subregion.

4.2.1 Carrying Out a Simple Search

This search can be used when some precise information is known, as for example here, the case reference number.

1. Click the NEC Housing Advice product area.

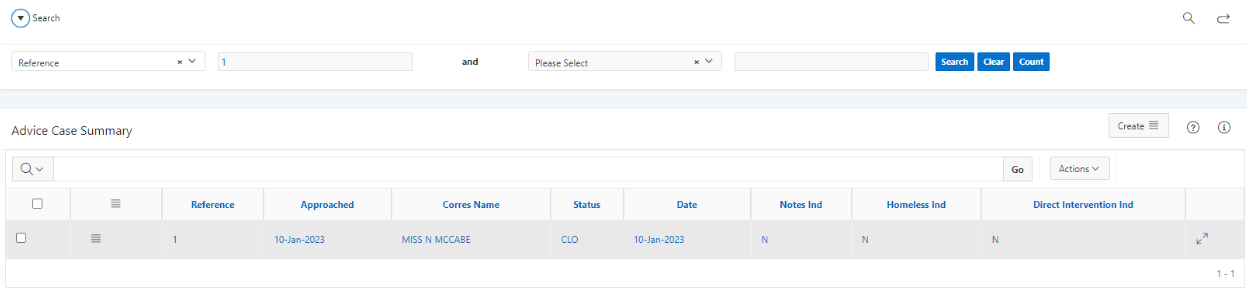
2. Click the Advice Cases business area.

3. Select Reference from the Search on Please Select list.

4. Enter 1 in the field immediate to the right of the Search on list.

5. Click Perform Search.

The case reference 1 (MISS N MCCABE) will be returned to the Advice Cases summary page.



4.2.2 Carrying Out an Advanced Search

1.Click NEC Housing Advice.

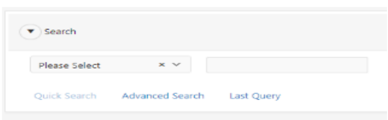
2.The NEC Housing Advice product area appears.

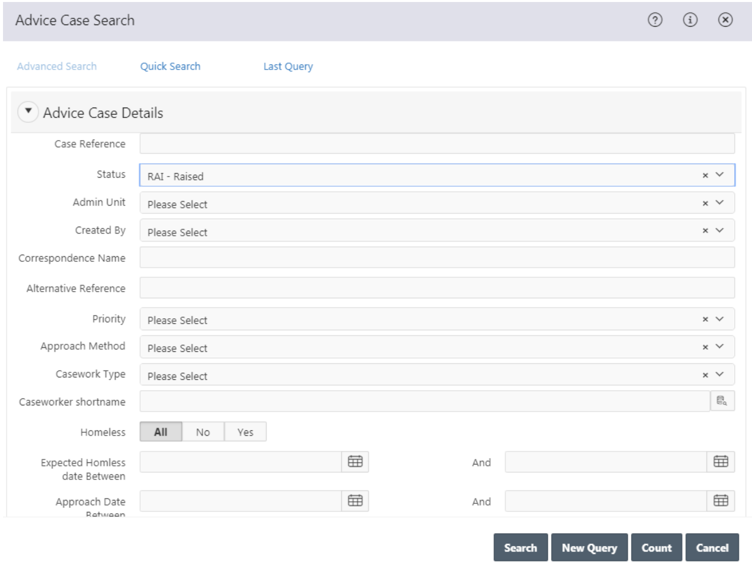
3.Click Advice Cases if it is not already highlighted. The Advice Cases business area summary page appears.

4.Click Advanced Search in the Search subregion.

The Advanced Search page appears.

Enter your search criteria, e.g. select RAI(sed) from the Status drop down field:

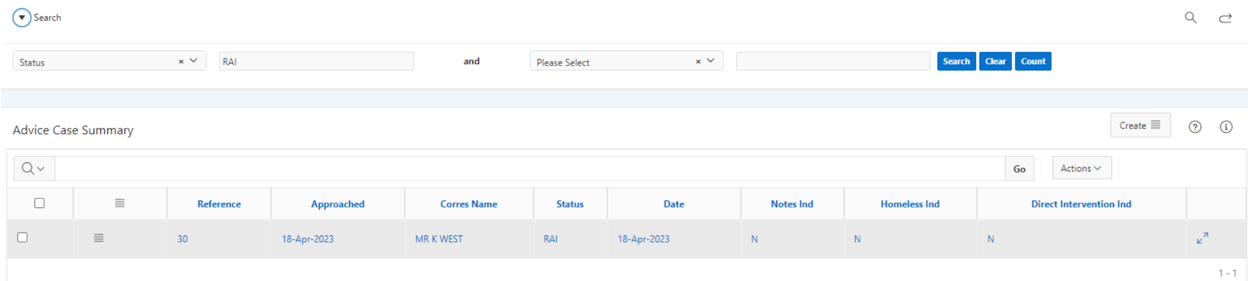




5.Click Search.

6.The Advice Cases business area summary page reappears, displaying all the Advice Cases with a status of RAI(sed).

The records that meet your search criteria are displayed in the Advice Case Summary page.



4.2.3 Search Results

When you run a simple search or advanced search the results are displayed in the region from which the search was called.

If a large number of records are returned, use the Next link to scroll to the next page of results.

4.2.4 Inexact Search Criteria

You can use wildcards and comparison operators in your search criteria where the exact criteria is unknown.

The Percent wildcard (%)

The percent sign represents any number of characters. For example:

STEVEN%

Could retrieve STEVEN or STEVENS or STEVENSON or STEVENTON.

STE%EN

Could retrieve STEVEN or STEPHEN or STEFFEN

%MOUTH

Could retrieve EXMOUTH or PORTSMOUTH or SIDMOUTH

%MAY-1999

Would retrieve transactions in May 1999

The Underscore (_)

The underscore sign represents a single character. For example:

2_

Could retrieve 20 -29 and 2a, 2b.

3_ _

Could retrieve 300 -399 and 30a, 30b.

10-MAY-199_

Would retrieve transactions on 10th May in 1990 -1999

ME _ _

Could retrieve MER or MEAR or MEIR

5. Creating an Advice Case

To complete this task, perform the following steps.

1.Click NEC Housing.

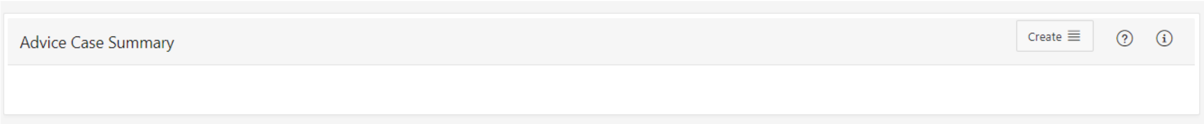
2.Click NEC Housing Advice.

The default summary page appears.

3.Click Advice Cases.

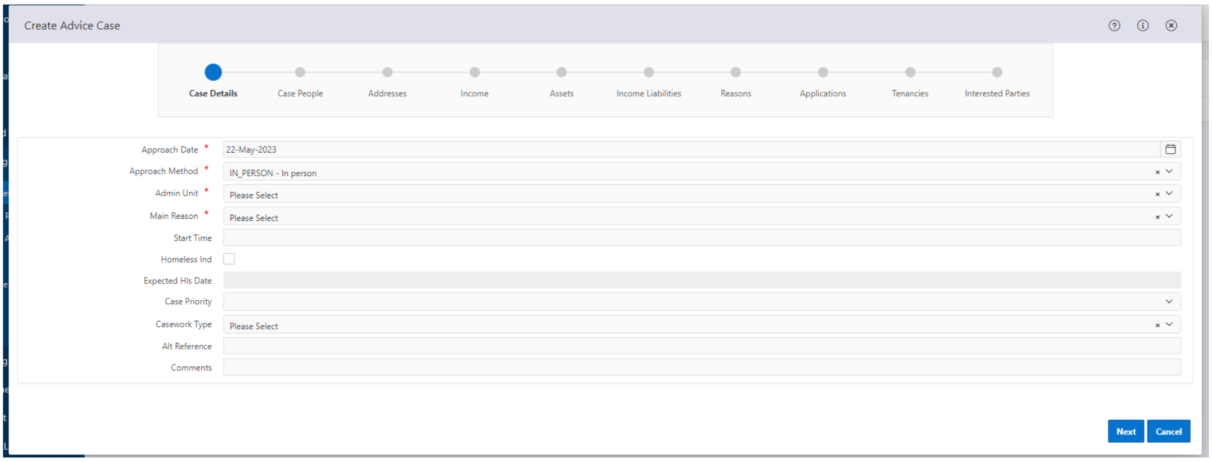
The Advice Case summary page appears.

4.Click Create Advice Case from the Create list in the region banner.



The Create Advice Case wizard appears.

5.Enter the relevant data in the Create Advice Case wizard including the people associated with the case and the address(es).



For further information see the section describing the Create Advice Case wizard below.

6.Click Save at the end of the wizard.

The new advice case appears in the Advice Case Summary region with a Status of RAI (Raised).

5.1 Create Advice Case Wizard

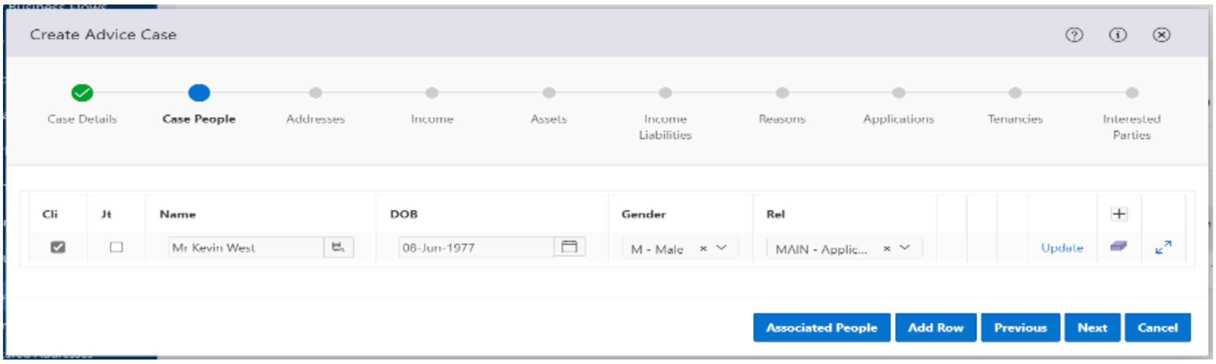
The first page of the wizard is 'Case Details Subpage' and listed below are details of each field.

5.1.1 Case Details Subpage Fields

Field	Status	Description
Approach Date	Required	Enter or select the date your organisation was approached about the advice case.
Approach Method	Required	Select the method of approach used in relation to the advice case. A default value may have been configured.
Admin Unit	Required	Select the admin unit responsible for the advice case.
Main Reason	Required	Select the primary reason for the client's enquiry. NOTE – Additional Reasons can be entered on the Reasons subpage later in the wizard.
Start Time	Optional	Enter the time the client made the enquiry.
Homeless Ind	Optional	Check this box if the client has or is likely to become homeless.
Expected Hls Date	Conditional	Enter or select the date the client is expected to become homeless. Note: This field is only available if the Homeless Ind is checked.
Case Priority	Optional	Select the advice case priority level. A default value may have been configured.
Casework Type	Optional	Select the casework type for the advice case.
Alt Reference	Optional	Enter an alternative reference for the advice case.
Comments	Optional	Enter any additional information about the advice case.

5.1.2 Case People Subpage

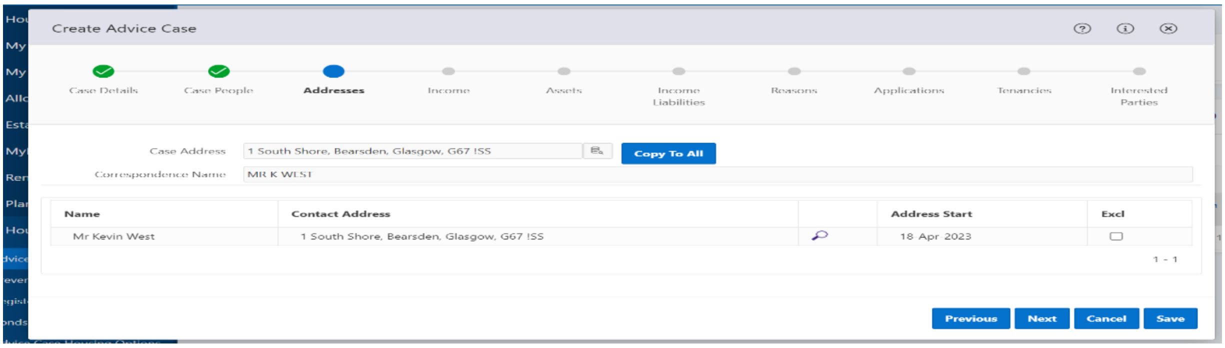
The second page of the wizard is 'Case People Subpage' and listed below are details of each field.



Field	Status	Description
Cli	Optional	Select an option to indicate if the person is a client or not.
Jt	Optional	Select an option to indicate if the person is a joint client or not.
Name	Required	Click the search icon and search for the record. If the person is not found click on the Create Person button and enter the relevant details in the Create Person wizard.
Date of Birth	Optional	Defaults from the Person Details.
Gender	Optional	Defaults from the Person Details.
Rel	Optional	Select the relationship of the person to the advice case. If it is the prime applicant then select the appropriate code.
Add Row	Active	Click Add Row to add another person to the case.

5.1.3 Addresses Subpage

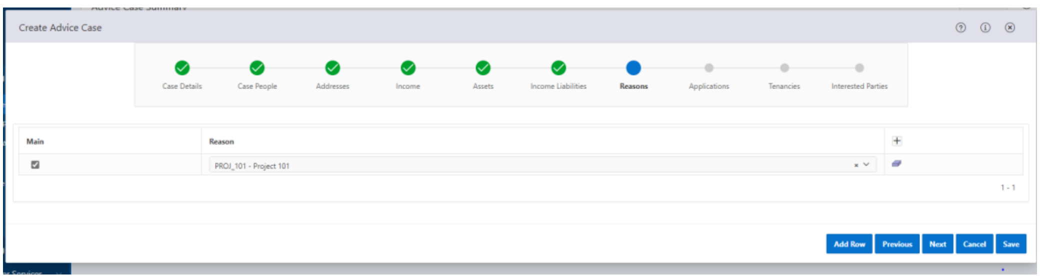
The third page of the wizard is 'Addresses Subpage' and listed below are details of each field.



Field	Status	Description
Case Address	Optional	If the client's address hasn't already been linked to the person, then click the search icon and search for the address.
Copy To All	Active	Click Copy To All to copy the case address to all those case people with no contact address displayed.
Correspondence Name	Optional	Enter the correspondence name for the advice case. A default value will appear but can be amended.
Name	Read-only	Name of the advice case client.
Contact Address	Read-only	Contact address of the advice case client.
Address Start	Read-only	Date the contact address started.
Excl	Optional	Select whether or not the person should be contacted at the stated contact address. Note: If exclude is Y the case address will not be copied to the contact address if Copy To All is clicked.

5.1.7 Reasons Subpage

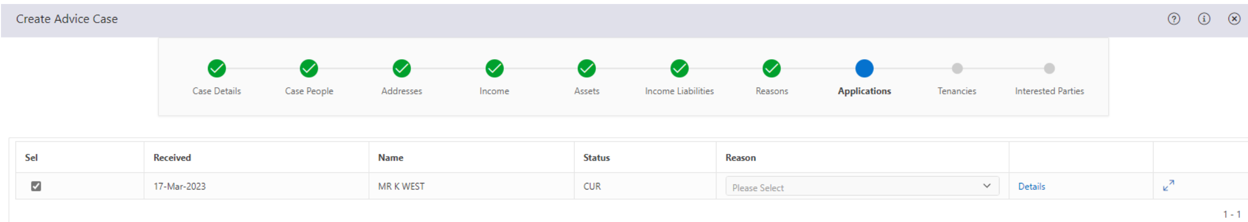
The next page of the wizard is 'Reasons Subpage' and listed below are details of each field.



Field	Status	Description
Main	Optional	This box will be checked by default and display the main advice case reason for the advice case. Note: There can only be one main reason for an advice case.
Reason	Defaulted	This will default to the main advice case reason entered on the first page of the wizard.
Add Row	Active	Click Add Row to add a new Reason to the case if required.

5.1.8 Applications Subpage

The next page of the wizard is ‘Applications Subpage’ and listed below are details of each field.



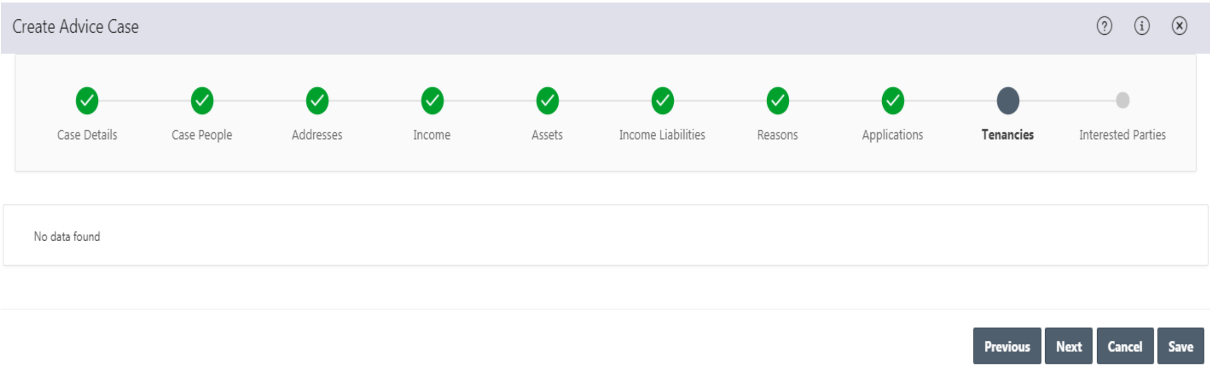
Note: If the client has never been linked to an application within Allocations, then no data will appear in the page and the User should click either the Next button or save.

Field	Status	Description
Sel	Optional	When checked the application will be associated with the advice case.
Received	Read-only	Date the application was received.
Name	Read-only	Correspondence name for the application
Status	Read-only	Application status.
Reason	Optional	Select the reason for associating the application to the advice case.

Comments	Optional	Enter any additional information about the interested party.

5.1.9 Tenancies Subpage

The next page of the wizard is 'Tenancies Subpage' and listed below are details of each field.

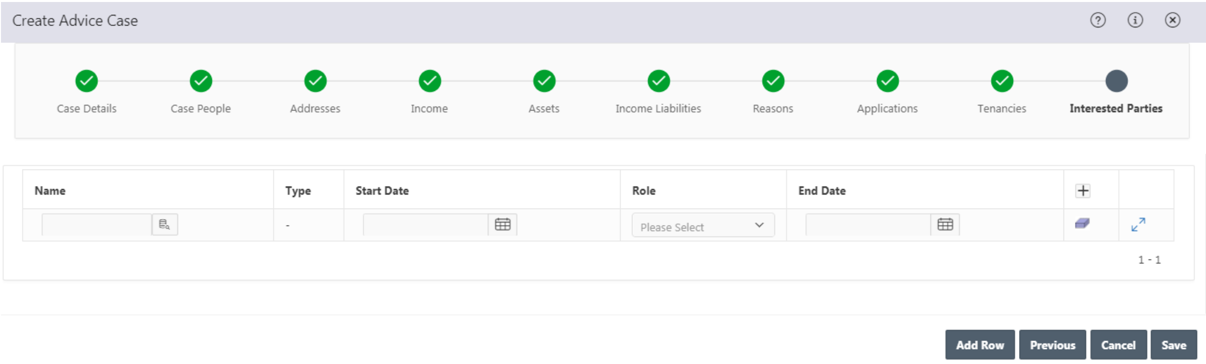


Note: If the client has never been linked to a tenancy within Estates, then no data will appear in the page and the User should click either the Next button or save.

Field	Status	Description
Sel	Optional	When checked the tenancy will be associated with the advice case.
Start Date	Read-only	Tenancy start date.
Tenancy	Read-only	Tenancy type code.
Tenure	Read-only	Tenure type code.
Status	Read-only	Tenancy status code.
Res	Optional	When checked there is a residential property on this tenancy.
Ntp	Read-only	When set to Y there is a notepad entry against the tenancy.
Reason	Optional	Select the reason for associating the tenancy to the advice case.
Comments	Optional	Enter any additional information about the tenancy association.

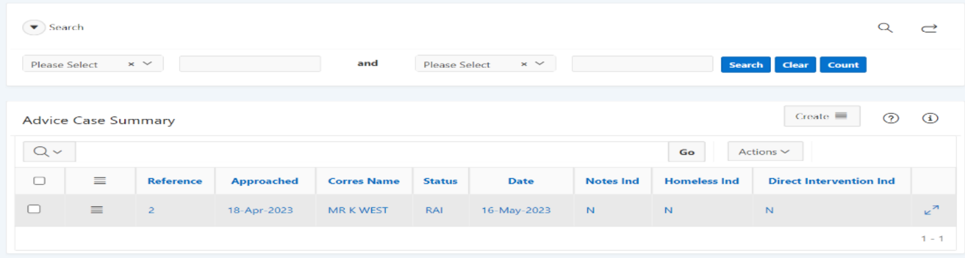
5.1.10 Interested Parties Subpage

The next page of the wizard is ‘Interested Parties Subpage’ and listed below are details of each field.



Field	Status	Description
Name	Optional	Click the Search icon and search for the interested party to be associated with the advice case.
Type	Read-only	Interested party type.
Start Date	Optional	Enter the start date for the interested party. Alternatively, click the calendar icon and select a date from the pop-up calendar.
Role	Optional	Select the role the interested party has in the advice case.
End Date	Optional	Enter the end date for the interested party. Alternatively, click the calendar icon and select a date from the pop-up calendar.
Comments	Optional	Enter any additional information about the interested party.
Add Row	Active	Click New Row to add a new row to the subpage, if appropriate.

At the end of the wizard click on Save. This returns you to the Advice Case Summary page where the new case is displayed with a system-generated Case Reference Number.



Search

Please Select | and | Please Select | Search | Clear | Count

Advice Case Summary

Create

Go | Actions

Reference	Approached	Corres Name	Status	Date	Notes Ind	Homeless Ind	Direct Intervention Ind
2	18-Apr-2023	MR K WEST	RAI	16-May-2023	N	N	N

1 - 1

6. Updating / Deleting an Advice Case

6.1 Updating an Advice Case

To complete this task, perform the following steps.

Note: Advice cases can only be updated if they are at a status of RAI - Raised or OPN - Open.

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1. Click NEC Housing.

2. Click NEC Housing Advice.

The default summary page appears.

3.Click Advice Cases if it is not defaulted to highlighted.

The Advice Cases summary page appears.

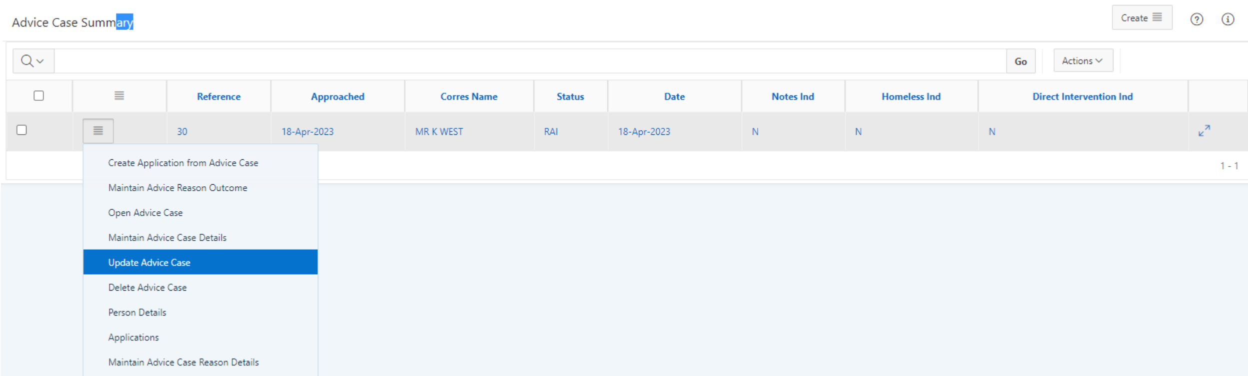
4.Enter your search criteria in the Search subregion.

If the default search options do not meet your needs, click Advanced Search and enter more specific search criteria.

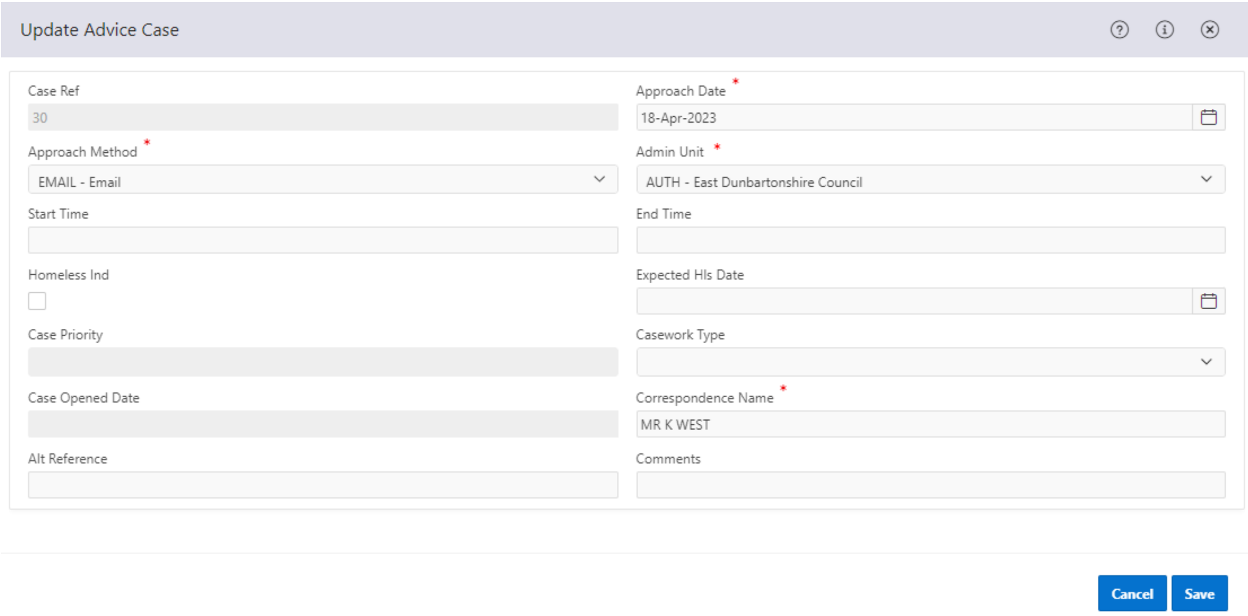
5.Click Search.

The records that meet your search criteria appear in the Advice Case Summary region.

6.Select Update Advice Case from the Actions list in the appropriate row.



The Update Advice Case subregion appears immediately below the record selected: with that record in context.



7. Enter the relevant data in the Update Advice Case subregion.

8. Click Save.

The subregion closes and you are returned to the Advice Case Summary region.

The changes you made to the advice case have been applied.

6.2 Deleting an Advice Case

To complete this task, perform the following steps.

Note: Advice cases can only be deleted if the status is set to RAI - Raised and if there are no associated instances of the following:

- Advice Reason Casework Events.
- Appointments.
- System General Contacts.
- Advice Case Associations.
- Advice Case Interested Parties.
- Advice Case Question Responses.

1.Click NEC Housing.

2.Click NEC Housing Advice.

The default summary page appears.

3.Click Advice Cases.

The Advice Cases page appears.

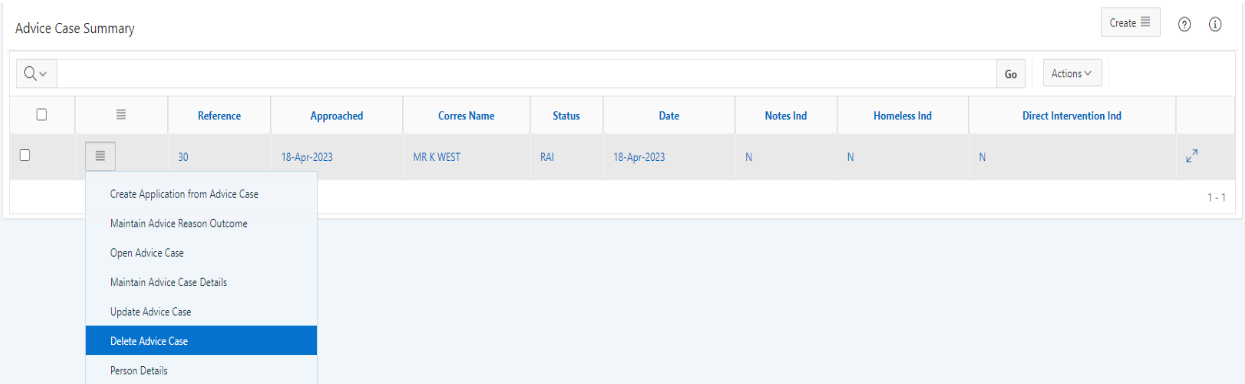
4.Enter your search criteria in the Search subregion.

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

5.Click Search.

The records that meet your search criteria appear in the Advice Case Summary region.

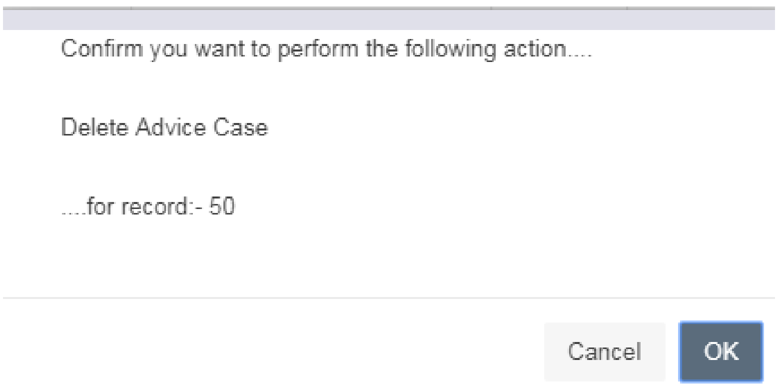
6.Select Delete Advice Case from the Actions list in the row containing the reference data you want to delete.



A message box appears.

7.Click OK.

The record has been deleted.



- Approach Date.
- Approach Method.
- Start and End Time (at reception).
- Enter a correspondence name.
- Enter an Alternative Reference.
- Enter any appropriate Comments.

Using the same case, take the action ‘Delete Advice Case’.

Search for the case to check it’s been deleted (this should not return any records).

7. Maintain an Advice Case

7.1 Opening an Advice Case

If an Advice Case is not resolved by giving one-off advice, then it may be opened for casework. Caseworkers can search for new cases by searching on, for example, cases with the status 'RAI' and a specific Casework Type.

To complete this task, perform the following steps.

Note: Advice cases may only be opened where the status of the advice case is currently set to RAI - Raised.

1.Click NEC Housing.

2.Click NEC Housing Advice.

The default summary page appears.

3.Click Advice Cases.

The Advice Cases summary page appears.

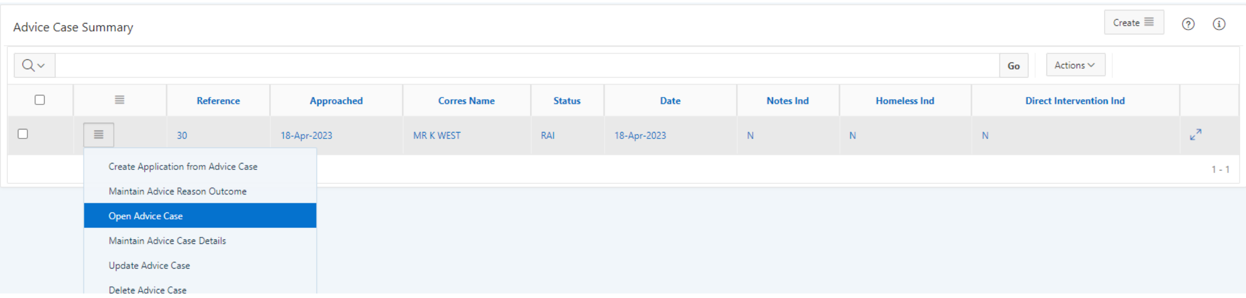
4.Enter your search criteria in the Search subregion.

If the default search options do not meet your needs, click Advanced Search and enter more specific search criteria.

5.Click Search.

The records that meet your search criteria appear in the Advice Case Summary region.

6.Select Open Advice Case from the Actions list in the appropriate row.

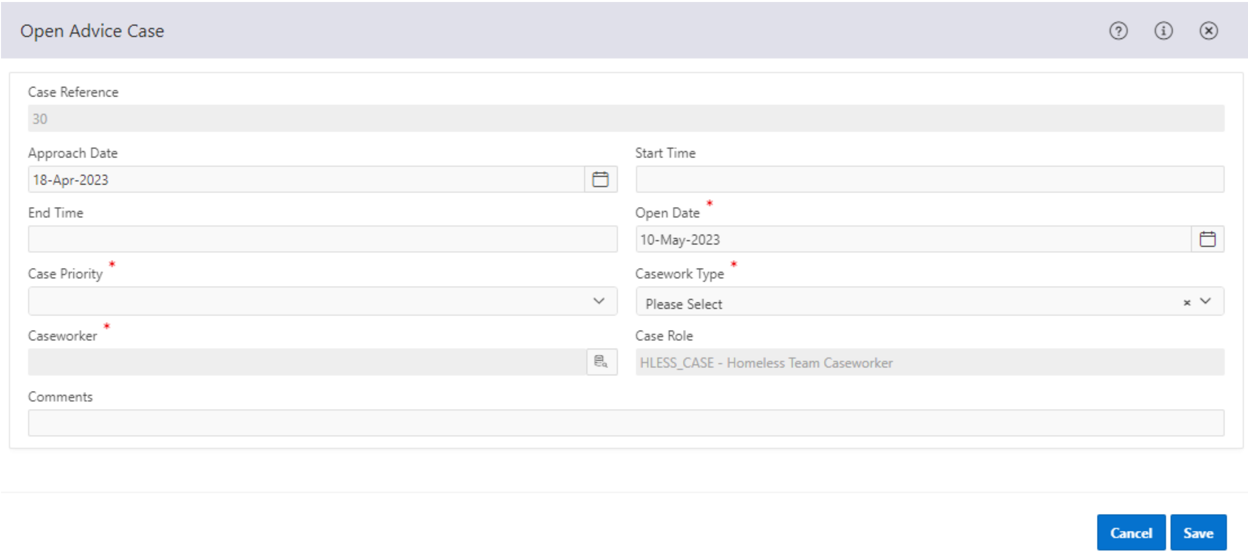


The Open Advice Case subregion appears immediately below the region.

7.Enter the relevant data in the Open Advice Case subregion.

8.Click Save.

The subregion closes and you are returned to the Advice Case Summary region. Note that the case now has a status of OPN (Open).



7.1.1 Subregion Fields

Field	Status	Description
Case Reference	Read-only	The system-generated reference for the advice case.
Approach Date	Read-only	The date your organisation was approached for advice.
Start Time	Optional	Enter the time the client was first seen by an adviser.
End Time	Optional	Enter the time the adviser ended the initial meeting.
Open Date	Required	Enter or select the opening date of the advice case. Note: The open date must be greater than or equal to the advice case approach date.
Case Priority	Optional	Select the advice case priority level.
Casework Type	Optional	Select the casework type of the advice case.
Caseworker	Required	Click the Search icon to open the Interested Party Details Search Criteria sub region.
Comments	Optional	Enter any additional information about the advice case.

7.2 Advice Questions and Responses

An advice case question response is the response given to a question in the course of gathering the required information for an advice case reason.

The Responses subregion enables you to maintain this information and displays details such as, the question asked and the response, the type of question and whether or not the question was mandatory.

You can access this subregion from the Reason region on the Advice Case Summary Details page within NEC Housing Advice, from where you can view and update question responses.

7.2.1 Create Reasons and Assign Responses to the Questions

To assign a Reason/s answer the relevant questions, perform the following steps:

1.Click NEC Housing.

2.Click NEC Housing Advice.

The default summary page appears.

3.Click Advice Cases.

The Advice Cases page appears.

4.Enter your search criteria in the Search subregion.

If the default search options do not meet your needs, click Advanced Search and enter more specific search criteria.

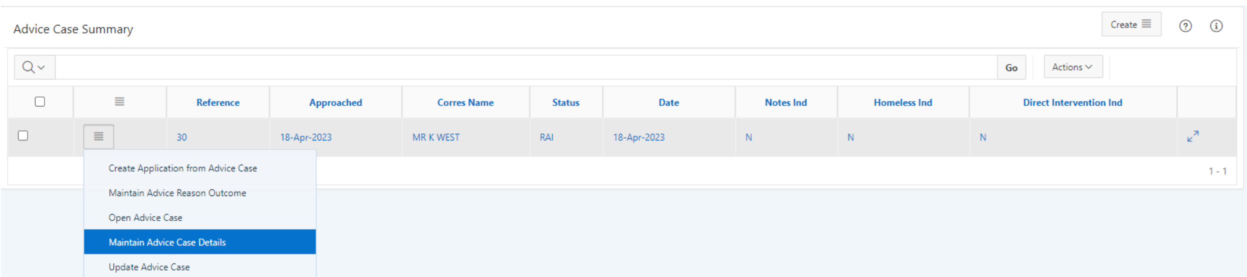
5.Click Search.

The records that meet your search criteria appear in the Advice Case Summary region.

6.Check the select box for the record.

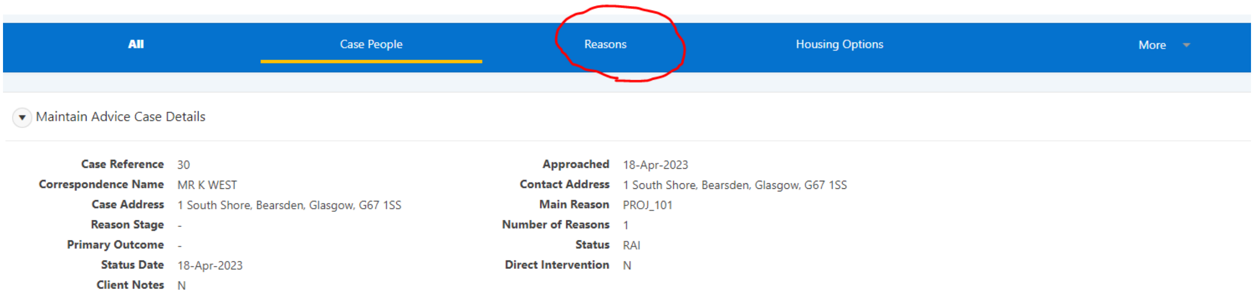
Alternatively, click the advice case record and go to step 8.

7.Select Maintain Advice Case Details from the Maintain list in the region banner.

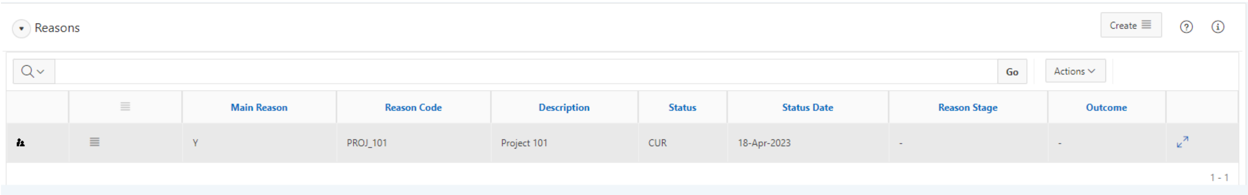


The Maintain Advice Case details page appears.

8. Click in the Reasons region banner



The Reasons region opens.

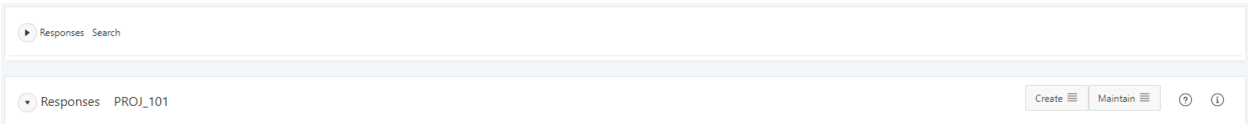


9.Click on the Parent/Child icon  containing the record you want to select.

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

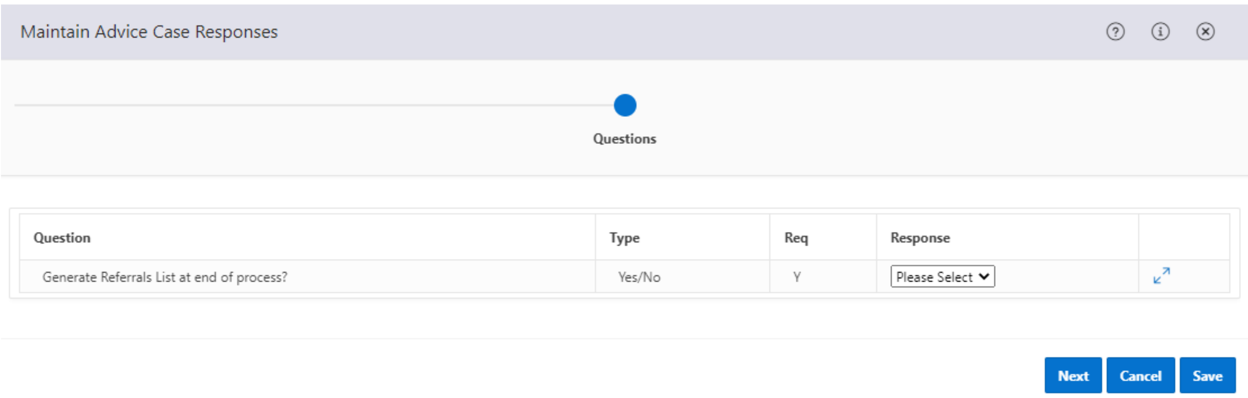
10.Click in the Responses subregion banner.

The Responses subregion opens.



11.Select Maintain Advice Case Response from the Actions list in the appropriate row.

The Maintain Advice Case Responses wizard appears.



12.Enter the relevant data in the Maintain Advice Case Responses wizard.

13.Click Save. The wizard closes and you are returned to the Responses region.

The changes you made to the advice case responses have been applied.

7.3 Holding Advice Cases

To complete this task, perform the following steps.

Note: Note: An advice case can only be put on hold where the status of the advice case is currently set to OPN - Opened or RAI – Raised.

1.Click NEC Housing.

2.Click NEC Housing Advice.

The default summary page appears.

3.Click Advice Cases.

The Advice Cases page appears.

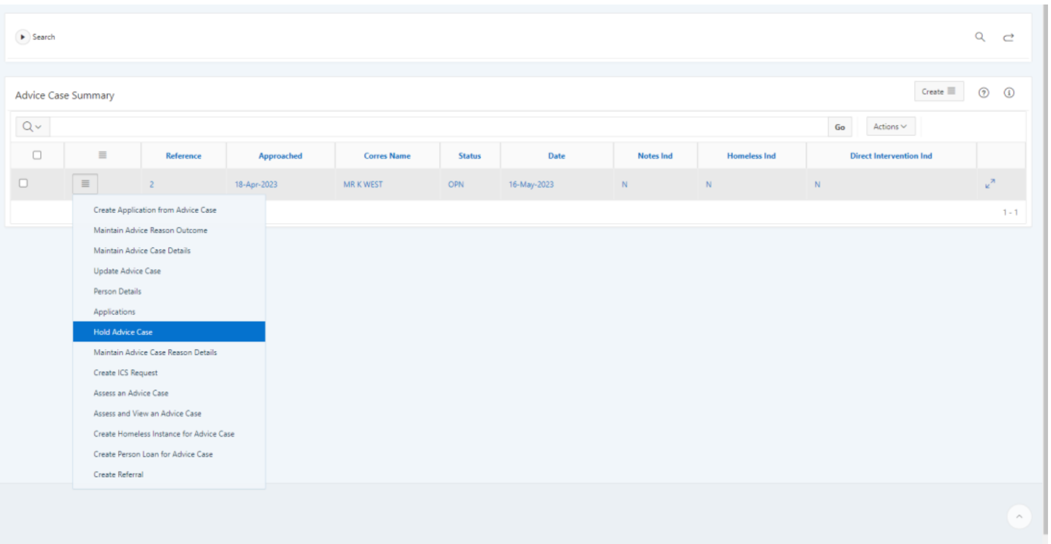
4.Enter your search criteria in the Search subregion.

If the default search options do not meet your needs, click Advanced Search and enter more specific search criteria.

5.Click Search.

The records that meet your search criteria appear in the Advice Case Summary region.

6.Select Hold Advice Case from the Actions list in the appropriate row.



The Hold Advice Case subregion appears immediately below the region.

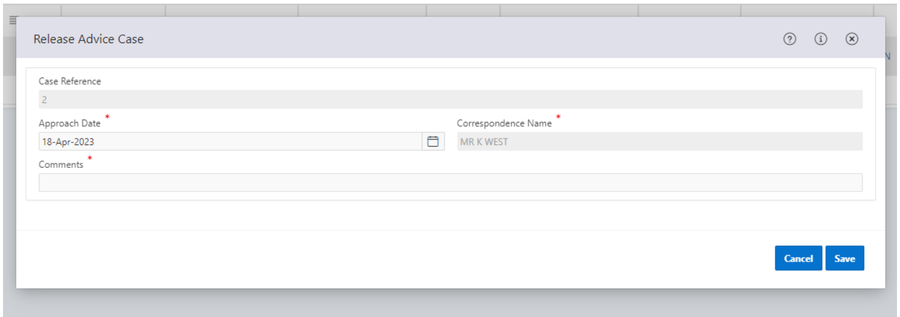
7.Click Save to save the record and return to the Advice Case Summary region.

The advice case status has now been updated to HLD.

7.4 Releasing an Advice Case

Note: Note: An advice case can only be released where the status of the advice case is currently set to HLD - Held.

To complete this task, perform the following steps:



1.Click NEC Housing.

2.Click NEC Housing Advice.

The default summary page appears.

3.Click Advice Cases.

The Advice Cases page appears.

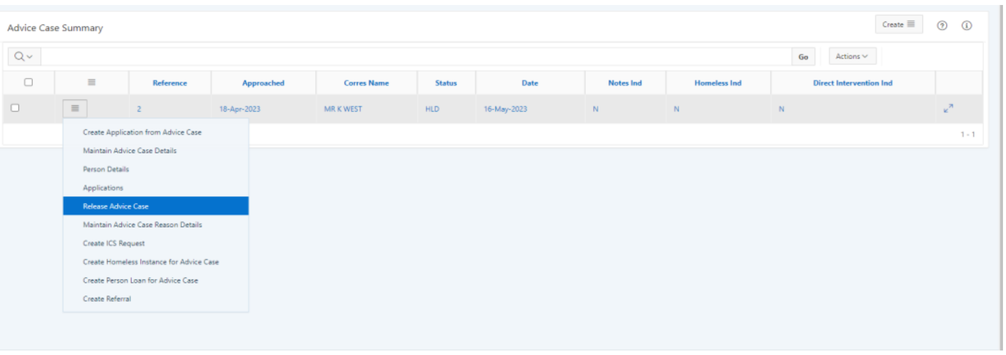
4.Enter your search criteria in the Search subregion.

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

5.Click Search.

The records that meet your search criteria appear in the Advice Case Summary region.

6.Select Release Advice Case from the Actions list in the appropriate row.



The Release Advice Case subregion appears immediately below the region.

7.Enter the relevant release comments.

8.Click Save to save the record and return to the Advice Case Summary region.

The advice case has been released.

7.5 Viewing and Updating Income Details

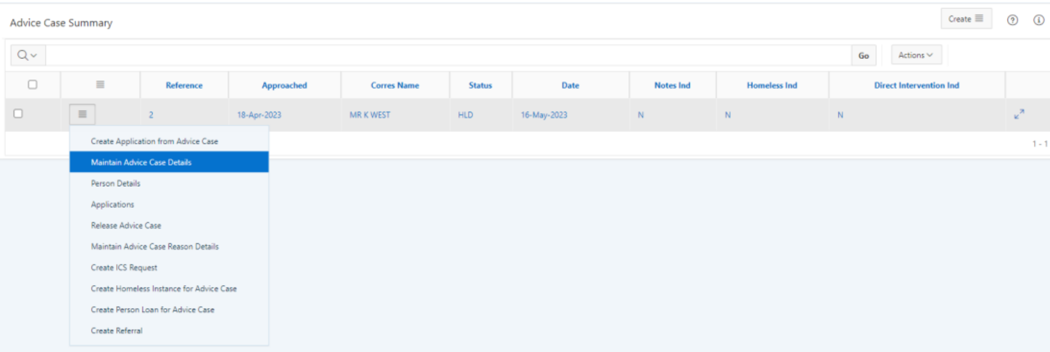
1.Click NEC Housing.

2.Click NEC Housing Advice.

The default summary page appears.

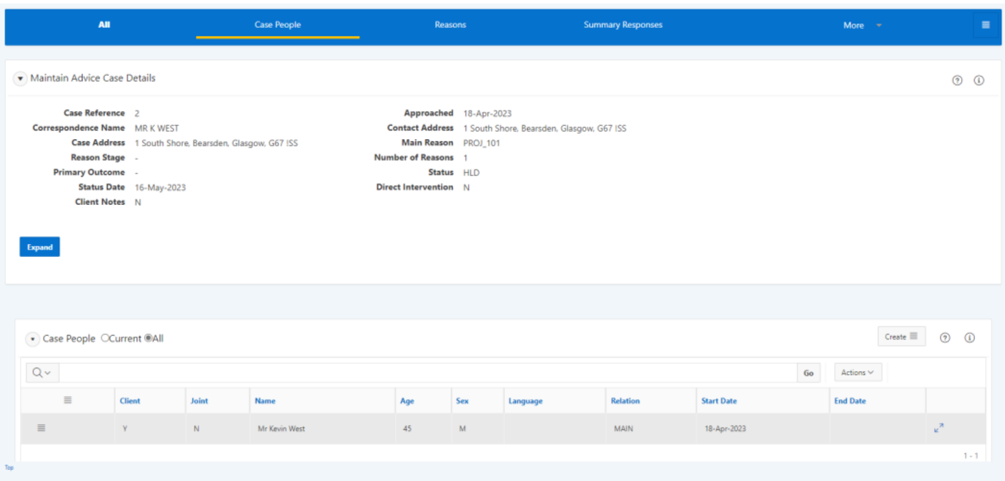
3.Enter your search criteria in the Search subregion.

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



4. Either click on the selected record or choose ‘Maintain an Advice Case’ from the Actions column.

This takes you to the Maintain Advice Case Details page.



8. NEC Housing Options

8.1 Assess Advice Case

NEC Housing Options cannot be manually created but are generated by the system based on user defined eligibility criteria. NEC Housing Options could reflect any number of products or services that can be offered to a client such as Rent Deposit, Social NEC Housing, Benefits Advice, Mortgage Rescue, Disrepair, Prevention etc.

NEC Housing Options are created in the context of an Advice Case and can be viewed and maintained from the *NEC Housing Options* region on the *Advice Case Details Page* or from the *NEC Housing Options Summary Page* and *NEC Housing Option Details Page*.

To complete this task, perform the following steps.

Click NEC Housing Advice.

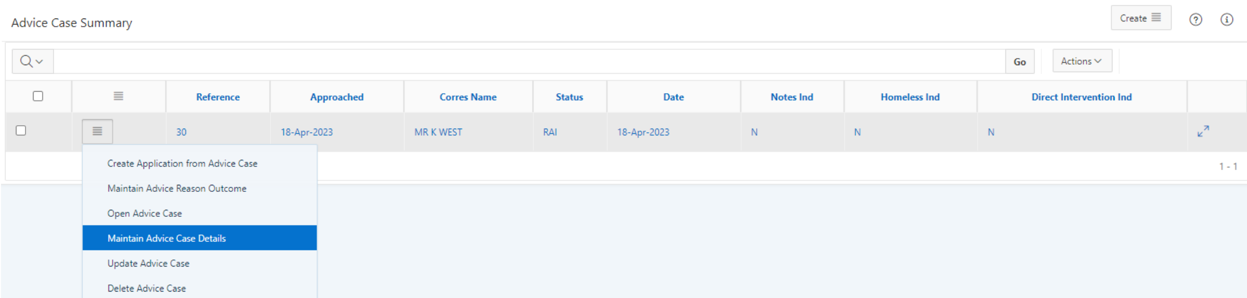
The default summary page appears.

Enter your search criteria in the Search subregion.

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

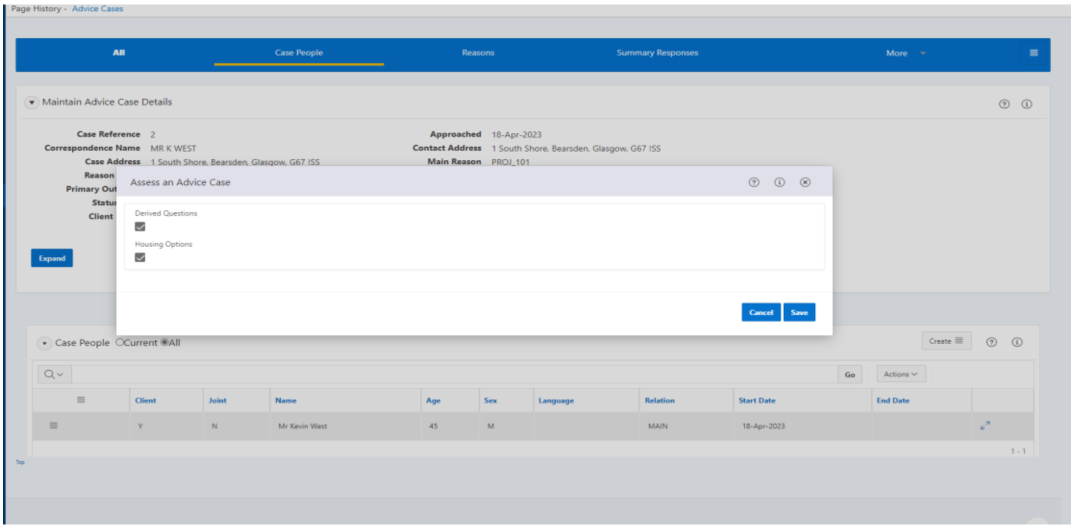
Click Search.

The records that meet your search criteria appear in the Advice Case Summary region.



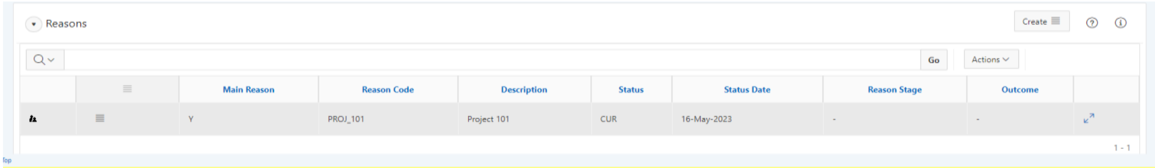
Either click on the record or select Maintain Advice Case Details from the Actions column.

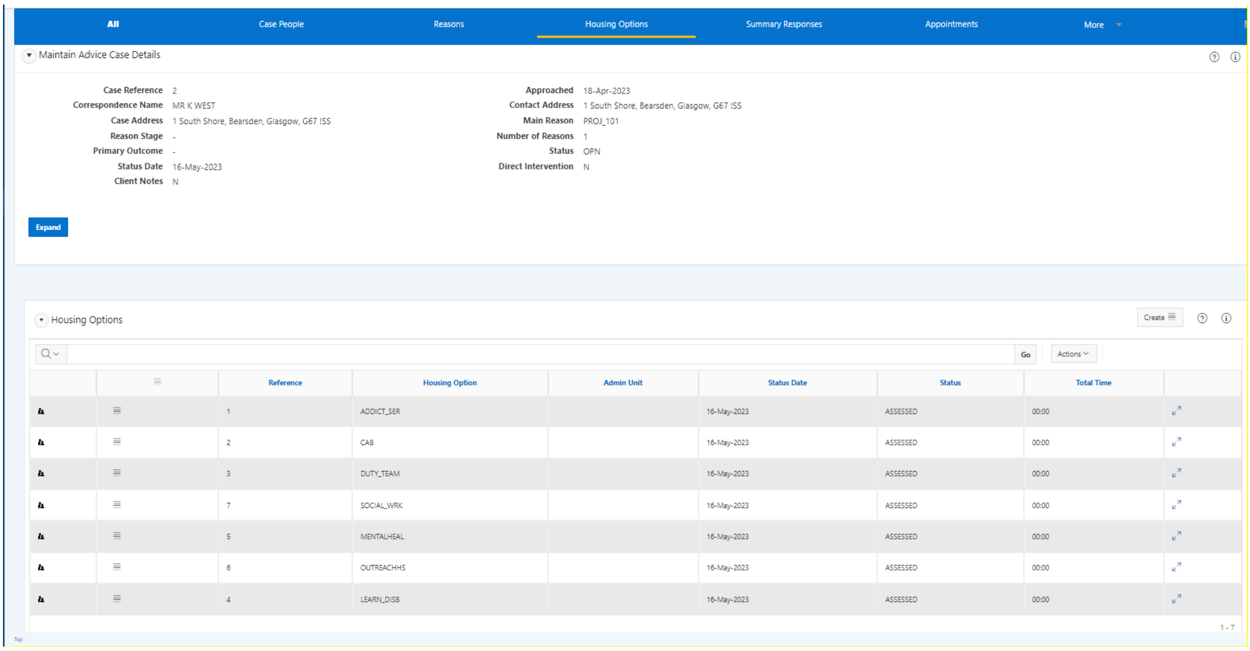
Select either Assess Advice Case or Assess and View Advice Case from the Actions region at the top of the page. NOTE - These Actions are only available when the Advice Case has a status of ‘RAI’ or ‘OPN’.



Click on Save to run the assessment.

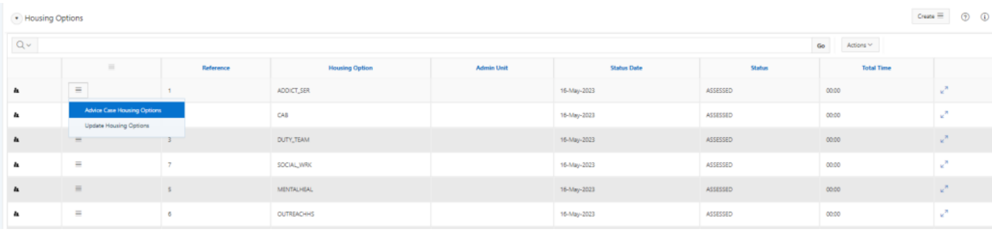
These actions will first generate answers to derived questions that haven't been answered in line and secondly, based on the eligibility criteria configured, generate the appropriate NEC Housing Options. A client could be eligible for more than one NEC Housing Option. Select the NEC Housing Options region Housing Options .





8.2 Viewing and Maintaining NEC Housing Options

From the NEC Housing Options region select from the Actions ‘Update NEC Housing Option’. This allows the Admin Unit, Delivery Status, Start Date and Comments to be maintained.



Each NEC Housing Option when created will be awarded a default Delivery Status. The NEC Housing Option can then be progressed through any number of user defined Delivery Statuses which can be configured to reflect the lifecycle of the NEC Housing Option.

So, for example, although the system has determined that a client may be eligible for a NEC Housing Option use of questions and delivery statuses can determine whether a client is actually offered that product or service.

Flags against each NEC Housing Option Delivery Status determine whether Casework Events and/or Bonds can be created against the NEC Housing Option whilst at that Status.

It is also possible to validate a Registered Address Letting has been created against the NEC Housing Option prior to awarding a Delivery Status, and that the Registered Address Letting has a landlord recorded. This validation might be required, for example, if the NEC Housing Option is a Rent Deposit that is being paid directly to the landlord.

NEC Housing Option Delivery Statuses can either be manually awarded by the user via Update NEC Housing Option or they can be configured to be automatically awarded by the system via the answering of Questions using Maintain Question Responses.

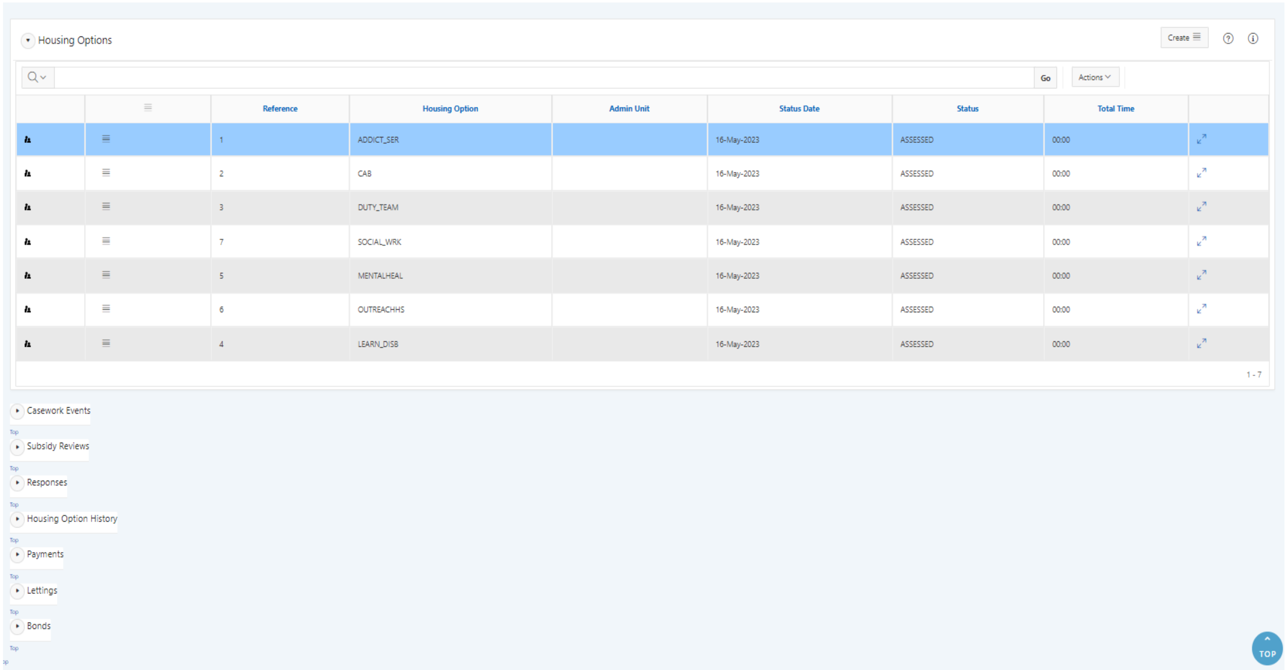
NEC Housing Options Assessments is new functionality (6.16.1) designed to allow regular reviews of an Advice Case NEC Housing Option to be performed. The configuration is designed to be flexible with user defined statuses and actions. Whilst designed to support the delivery of a time limited PRS (Private Rental Subsidy) NEC Housing option where the subsidy is gradually reduced via a series of tapers; this functionality can equally be used for any NEC Housing Options that require regular review.

An Advice Case NEC Housing Option can have any number of NEC Housing Option Assessments, and each can progress through a series of configurable actions that can either update the status of the Assessment and / or record an outcome.

8.2.1 NEC Housing Option Details

The NEC Housing Options region has a number of child region, these regions are also displayed on the NEC Housing Options Details Page and are: -

- Responses – see Questions and Responses for further details.
- Casework Events – see Casework Events for further details.
- NEC Housing Option History – this region displays changes that have been made to the NEC Housing Option, such as changes in status.



9. Advice Case Reasons and Events

9.1 Create a Casework Event

A Casework Event is the record of an event that occurred during the management of an Advice Case Reason, for example an interview, home visit, telephone call etc. Casework Events are recorded in the context of Advice Case Reasons.

Casework events can also be recorded as they occur, for example, meetings, interviews, telephone conversations, etc. Against casework events it is possible to record the people involved in the event and whether the casework event is regarded by the caseworker as direct intervention in preventing or delaying the client becoming homeless.

Casework Events can be created and maintained for an Advice Case Reason regardless of the Advice Case or the Advice Case Reason status.

To complete this task, perform the following steps.

1.Click NEC Housing.

2.Click NEC Housing Advice.

The default summary page appears.

3.Click Advice Cases.

The Advice Cases page appears.

4.Enter your search criteria in the Search subregion.

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

5.Click Search.

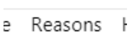
The records that meet your search criteria appear in the Advice Case Summary region.

6.Check the select box for the record.

Alternatively, click the advice case record and go to step 8.

7.Select Advice Case Summary Details from the Maintain list in the region banner.

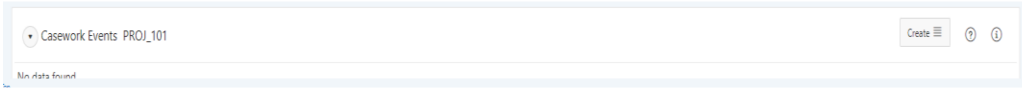
The Advice Cases details page appears.

8.Click 

in the region banner.

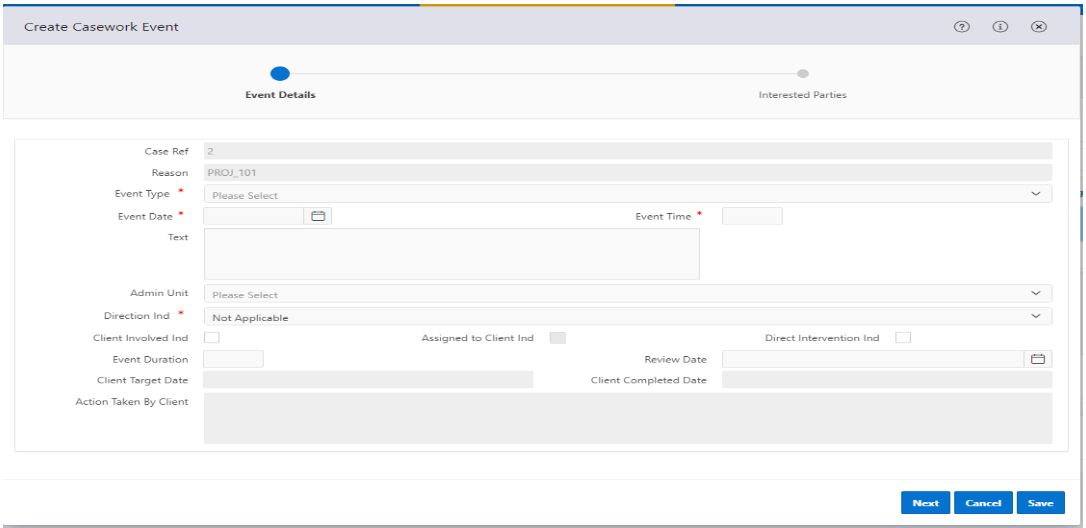
The Reasons region opens.

9.Click the parent/child icon in the row containing the record you want to select. The Casework Events subregion appears immediately below the record selected with that record in context.



10.Click Create in the Casework Events region banner.

The Create Casework Event wizard appears.



11.Enter the relevant data in the Create Casework Event wizard.

For further information see the page below describing the Create Casework Event wizard.

12.Click Save.

The new casework event appears in the Casework Events region.

The casework event has been created.

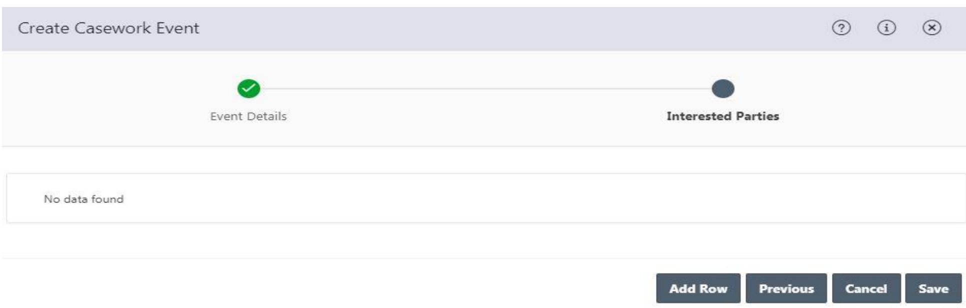
9.1.1 Casework Event Subpage Wizard

Use this subpage in the Create Casework Event wizard to enter details of the event.

It is accessed while creating a casework event and described in the following table.

Field	Status	Description
Case Reference	Read-only	The system-generated reference for the advice case.
Reason	Read-only	The advice case reason code.
Event Type	Required	Select the appropriate Event Type from the drop-down list of values.
Event Date	Required	Enter the Event Date.
Event Time	Required	Enter the time for the event. This defaults to the system time as the user proceeds through the page but can be modified.
Text	Required	Enter the casework event details.
Admin Unit	Optional	Select the administration unit providing assistance for the casework event if the existing selection needs to be updated.
Direction Ind	Optional	Select the casework event direction indicator i.e., either Incoming, Outgoing or Not Applicable.
Client Involved Ind	Optional	Check this box if the client was directly involved in the event.
Direct Intervention Ind	Optional	Check this box to indicate direct intervention has taken place.
Event Duration	Optional	Enter the duration of the casework event.
Review Date	Optional	Select the casework event review date.

Enter appropriate details if an Interested Party is to be added to the Event. Use the Add Row button and search for the record.



Click on Save once completed.

9.2 Create Advice Reason Outcomes

Before an Advice Case Reason can be closed at least one outcome must be assigned to the Advice Case Reason. The Advice Reason Outcome can record the result of the advice given and also what was done to resolve the problem. More than one Advice Reason Outcome can be assigned to an Advice Reason, for example, outcomes could be ‘Homelessness Prevented’ and ‘Rent Deposit Given’.

An Outcome may only be created or deleted if the Advice Case has a Status of 'RAI' (Raised) or 'OPN' (Open), and the associated Advice Case Reason has a status of 'CUR' (Current) or 'PEN' (Pending Authorisation).

Only one ‘Primary’ outcome can be assigned to an Advice Case Reason, but multiple ‘Secondary’ and ‘Other’ reasons may be assigned.

The primary and secondary outcomes can be used in performance indicator reporting.

To complete this task, perform the following steps.

1.Click NEC Housing.

2.Click NEC Housing Advice.

The default summary page appears.

3.Click Advice Cases.

The Advice Cases summary page appears.

4.Enter your search criteria in the Search subregion.

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

5.Click Search.

The records that meet your search criteria appear in the Advice Case Summary region.

6.Select Create Advice Reason Outcome from the Actions list in the appropriate row.

The Create Advice Reason Outcome wizard appears.

7.Enter the relevant data in the Create Advice Reason Outcome wizard.

For further information see the page describing the Create Advice Reason Outcome wizard below.

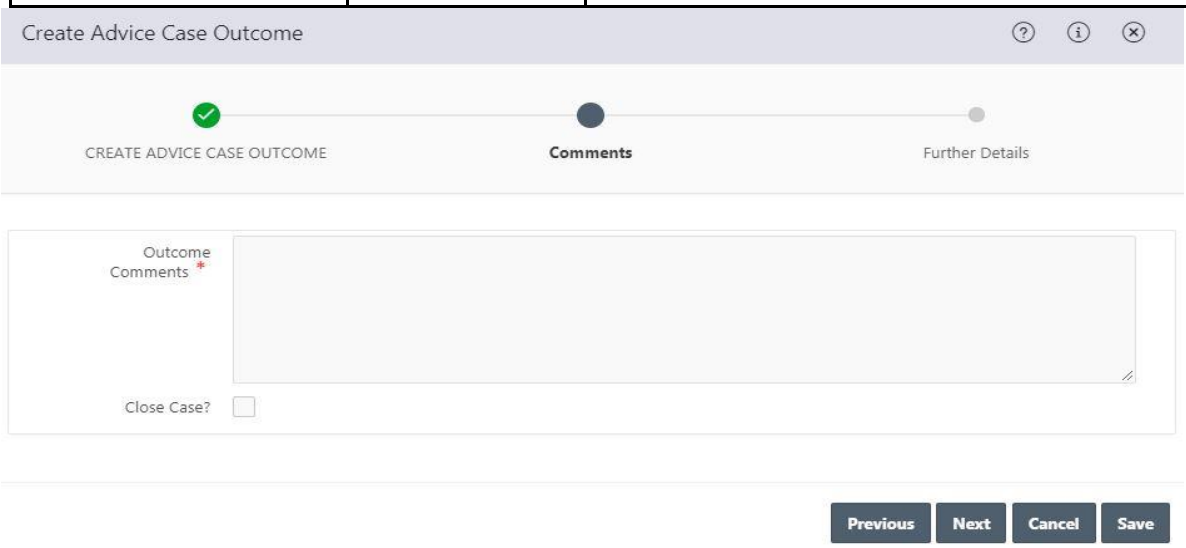
8.Click Save.

The wizard closes and you are returned to the Advice Case Summary region.

The advice reason outcome has been created.

This first page of the wizard is to input an Outcome Reason.

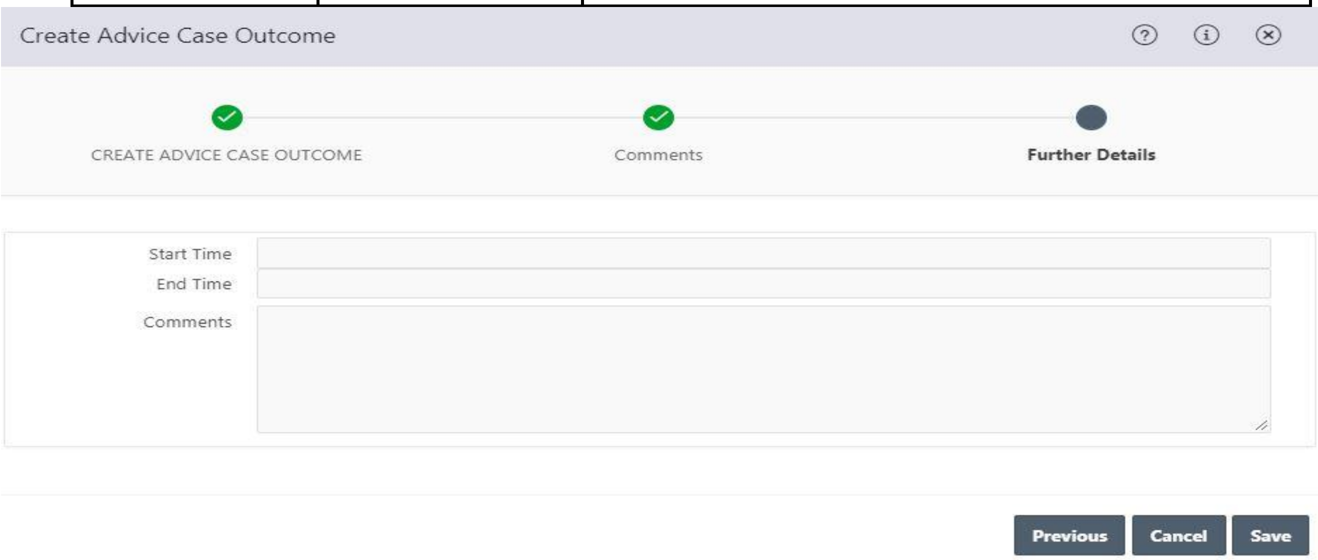
Field	Status	Description
Case Reference	Read-only	The system-generated reference for the advice case.
Reason	Read-only	The reason the client requested advice.
Outcome	Optional	Select the advice case outcome code.
Auth	Optional	When checked the outcome reason is authorised.
Add Row	Active	Click New Row to add a new row to the subpage.



Use this 2nd page in the Create Advice Case Outcome wizard to enter any comments associated with the advice case reason outcome.

Note: Note: If a primary outcome has been selected on the first page, then the ‘Outcome Comments’ field will be mandatory. If a primary outcome has not been selected, then the ‘Outcome Comments’ field will be optional.

Field	Status	Description
Outcome Description	Optional	Enter any additional information about the advice case reason outcome.
Close Case?	Optional	When checked the advice case reason will be closed when the reason outcome has been created.



Use this 3rd page in the Create Advice Case Outcome wizard to enter any further details associated with the advice case reason outcome.

Field	Status	Description
Start Time	Optional	Enter the time the client was first seen by an adviser.
End Time	Optional	Enter the time the adviser ended the initial meeting.
Comments	Optional	Enter any additional information about the advice case.

9.3 Close Advice Case Reason

To complete this task, perform the following steps.

1.Click NEC Housing.

2.Click NEC Housing Advice.

The default summary page appears.

3.Click Advice Cases.

The Advice Cases summary page appears.

4.Enter your search criteria in the Search subregion.

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

5.Click Search.

The records that meet your search criteria appear in the Advice Case Summary region.

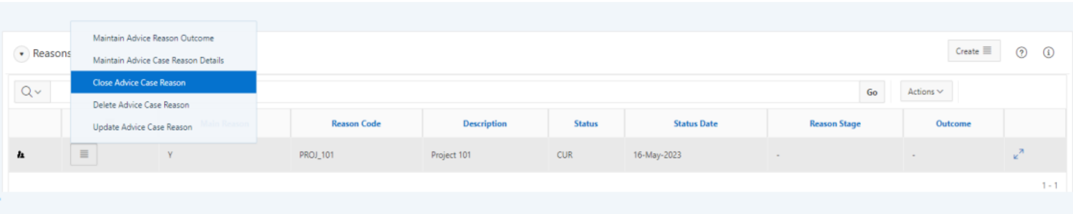
6.Check the select box for the record.

Alternatively, click the advice case record and go to step 8.

7.Select Maintain Advice Case Summary Details from the Maintain list in the region banner.

The Advice Cases details page appears.

8. Click Reasons in the region banner.
The Reasons region opens.



9. Select Close Advice Case Reason from the Actions list in the appropriate row.

The Close Advice Case Reason subregion appears immediately below the region.

10.Click Save.

The subregion closes and you are returned to the Advice Case Summary region.

The advice case reason has been closed.

Return to the summary page, where the status has now updated to CLOsed. If there is only one reason associated with the case, then the status of the case also updates to CLOsed.

9.4 Re-Open an Advice Case

To complete this task, perform the following steps.

1.Click NEC Housing.

2.Click NEC Housing Advice.

The default summary page appears.

3.Click Advice Cases.

The Advice Cases summary page appears.

4.Enter your search criteria in the Search subregion.

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

5.Click Search.

The records that meet your search criteria appear in the Advice Case Summary region.

6.Check the select box for the record.

Alternatively, click the advice case record and go to step 8.

7.Select Advice Case Summary Details from the Maintain list in the region banner.

The Advice Cases details page appears.

8.Click 

in the region banner.

The Reasons region opens.

9.Select Re-Open Advice Case Reason from the Actions list in the appropriate row.

10. Click Save.

11.The status of the reason and the Advice Case has now automatically been updated from CLOsed to CURrent.

10. Create an Application from an Advice Case

There is the functionality to create a re-NEC Housing Application from an Advice Case. To complete this task, perform the following steps.

1.Click NEC Housing.

2.Click NEC Housing Advice.

The default summary page appears.

3.Click Advice Cases.

The Advice Cases summary page appears.

4.Enter your search criteria in the Search subregion.

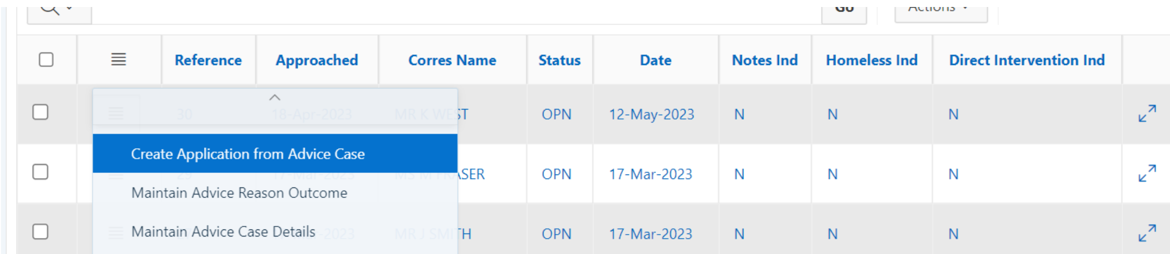
If the default search options do not meet your needs, click Advanced Search and enter more specific search conditions.

5.Click Search.

The records that meet your search criteria appear in the Advice Case Summary region.

6.Select Create Application from Advice Case from the Actions list in the appropriate row.

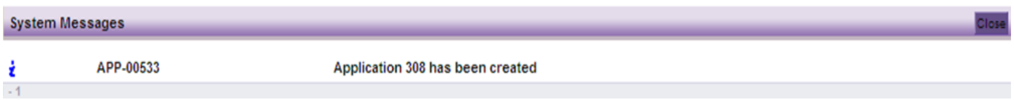
The Create Application from Advice Case wizard appears.



7.Enter the relevant data in the Create Application from Advice Case wizard.

8.Click Save.

A message pops up and displays the Re-NEC Housing Application reference number of the application just created.



8. Acknowledge the message.

9. The wizard closes and you are returned to the Advice Case Summary region.