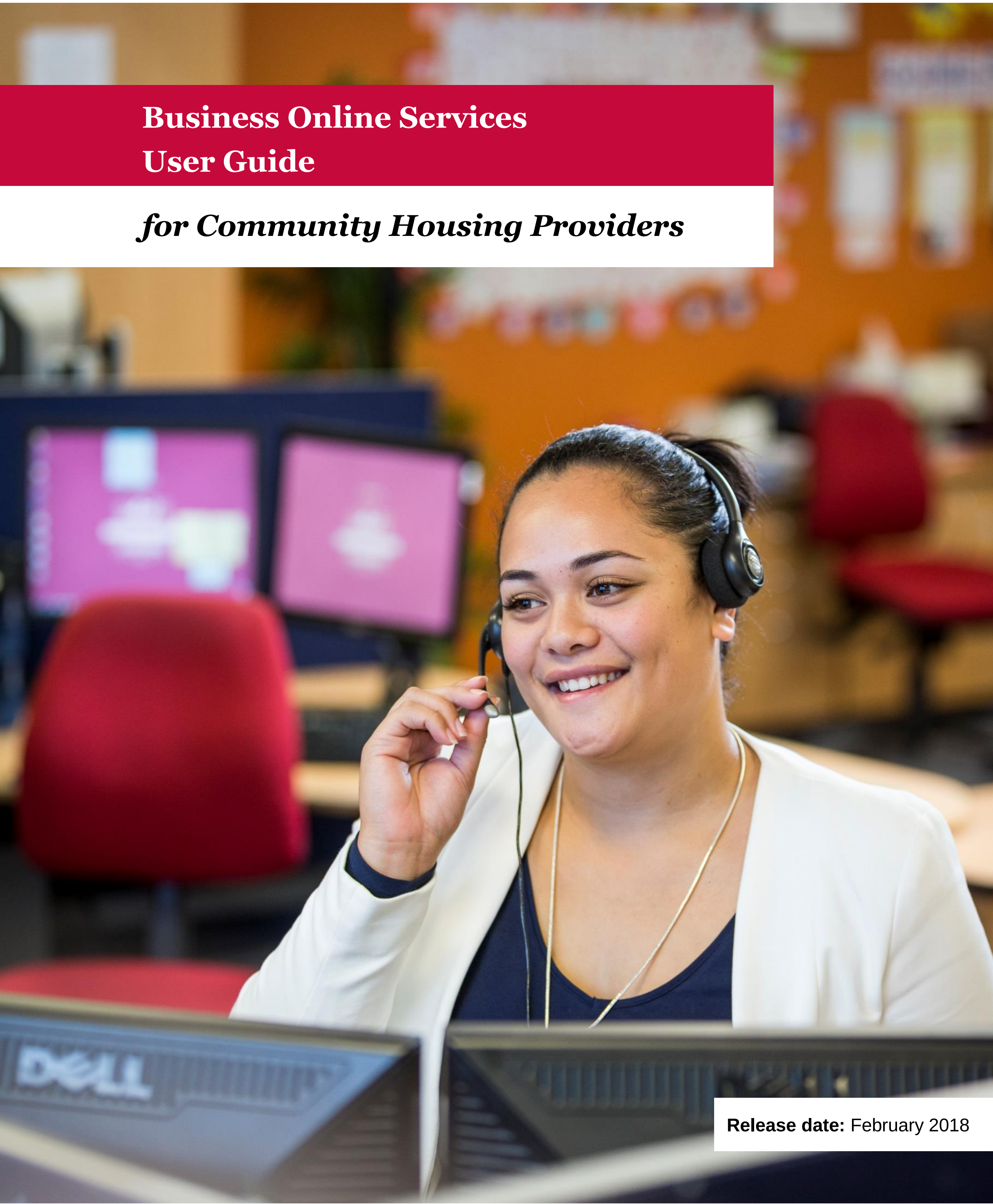
MINISTRY OF SOCIAL DEVELOPMENT
TE MANATŪ WHAKAHIATO ORA

Business Online Services User Guide

for Community Housing Providers



Release date: February 2018

Contents

Introduction to Business Online Services

Business Online Services (BOS) was introduced as an application to communicate between you and the Ministry of Social Development (Ministry). This application balances the efficient sharing of data protecting the privacy of social housing applicants and tenants.

As part of the process of being a contracted community housing provider (CHP) to the Ministry, the Strategic Purchasing team will record details of your Income-Related Rent Subsidy (IRRS) agreement and grant your organisation access to BOS.

User roles

Once your organisation has been given access to BOS you must have at least one administrator account at all times (refer to 'Creating a new user account on page 13). The roles that can be allocated to your users are:

- 'Housing Financial Administrator' - can view and access all functions including financials on the Requests tab (receives notifications)
- 'Administrator' – can view and update everything except financials (receives notifications)
- 'Housing User' – can view and access functions excluding financials, and can't create new users.

Uploading documents to Business Online Services

Note: When you are uploading a file to BOS the filename must be alphanumeric - it must only contain alphabetic characters, A to Z, and numerals, 0 to 9, it must not contain any spaces, e.g. a valid filename is 150526Invoice.

Tabs/Screens

Within BOS you will need to navigate to different tabs and screens. Each of these has been described for you.

- Home tab – displays some details about you that have been entered by Ministry staff. You can only change the 'Known As' name.
- Services tab – lists the services you provide to the Ministry.
- Credentials tab – the Categories screen displays the categories for the service(s) that you provide to the Ministry.
- Relationships tab:
  - MSD Staff – lists Strategic Purchasing staff members.
  - Provider Members – ADMINISTRATOR ONLY use this screen to create and view your users for BOS.
- Contact tab – use the screens on this tab to maintain your postal address, phone number, email address, etc.

- Requests – FINANCIAL ADMINISTRATOR ONLY use the screens on this tab to view and submit service invoice requests. You will need to use the attachments screen to upload your IRRS tax invoice.
- Housing – use the screens on this tab to submit vacancies, manage the shortlist and referrals, manage tenancies and process any unsolicited shortlist referrals.

Screen icons

Within BOS you will need to select the following icons to complete actions:

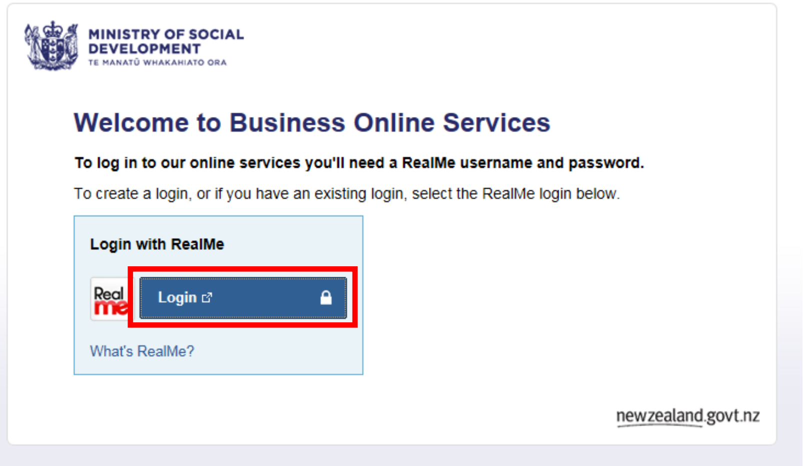
- Display Action Menu
- Search
- Date Picker

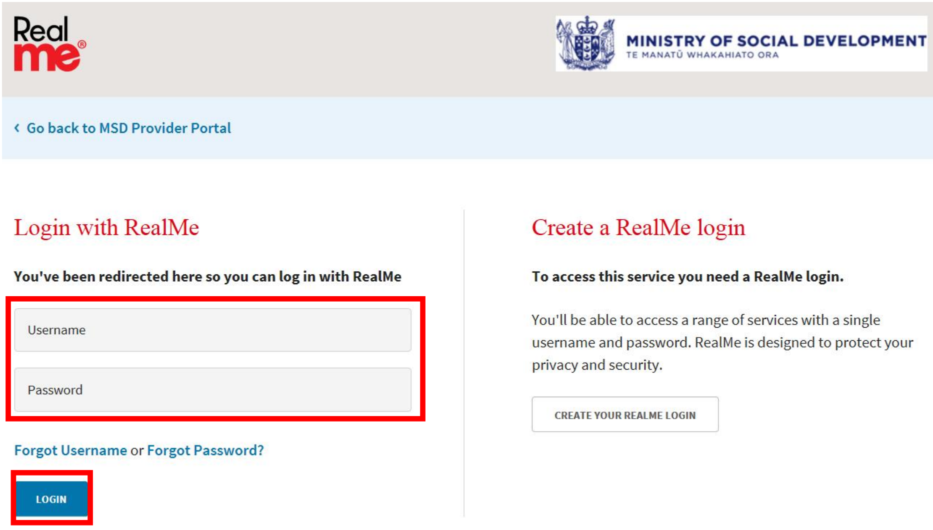
Part 1: Accessing Business Online Services

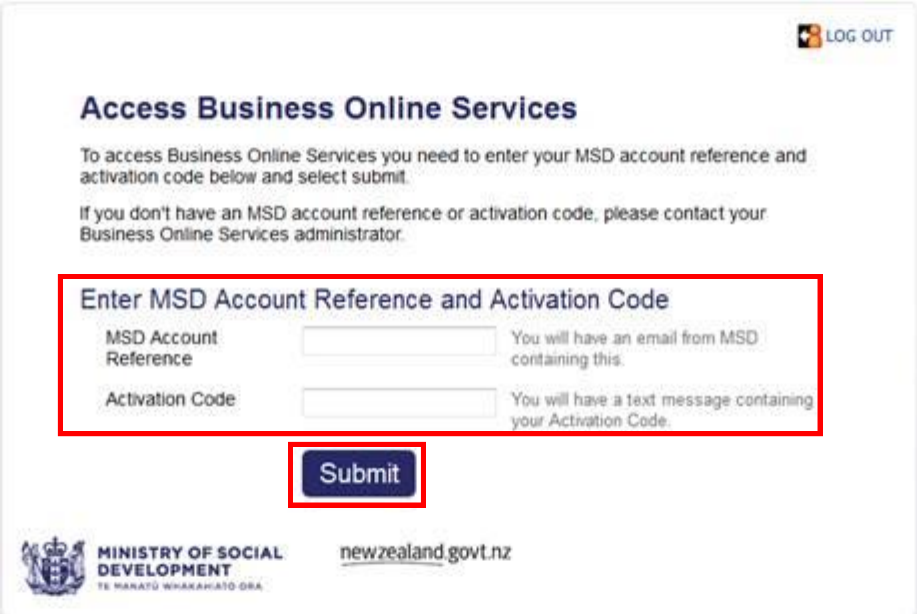
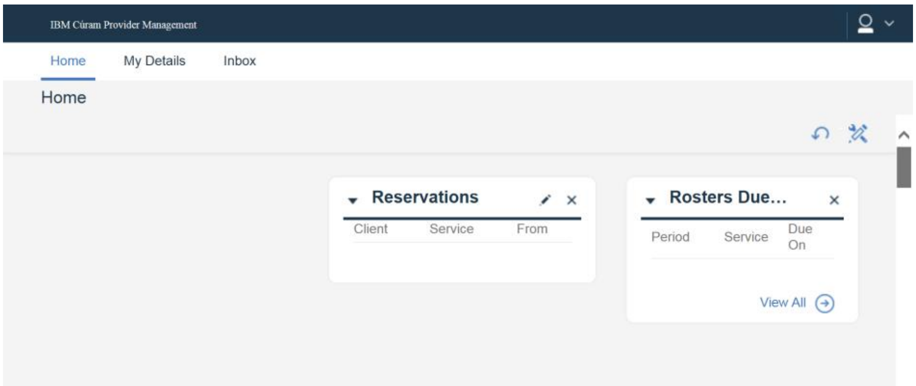
Logging into BOS

Note:

- If you already have a RealMe account you may not need to create a new one to access BOS.
- If you do not have a RealMe account, instructions to create one have been included as Appendix A.

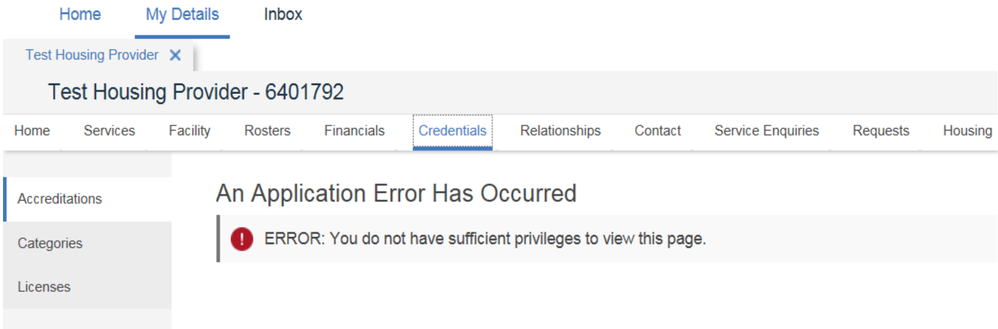
Description	Screenshot
Step one Launch Business Online Services by entering the following URL into the address bar of your browser	**Production environment:** https://businessonlineservices.msd.govt.nz/bos/MSDProviderLogon.jsp
Step two Click the RealMe Login button **Note:** This is not required when logging into the 'training' environment	

<table>
<tr><th>Description</th><th>Screenshot</th></tr>
<tr><td>Step three
Enter your username and password and select ‘Login’</td><td>
</td></tr>
<tr><td>Step four
Enter the six digit RealMe code you receive via text message and select ‘Continue’</td><td>
</td></tr>
</table>

Description	Screenshot
Step five When you log in for the first time, the following screen displays The MSD Account Reference – you will have received this via email The Activation Code is the 7 digit code you received via text message Then select 'Submit' **Note: You will only need to complete this step when you log into Business Online Services for the first time**	
You will be directed to the 'Provider Home Page'	

Unauthorised access screen messages

- If you see the following error message, this means you do not have access to this screen. This is intentional, as there are some screens within the system that are not used at this stage.
- You may only see this message for one screen, and not all screens within the tab. In the example below, with the Credentials tab – you are able to view the Categories screen, but we are not currently using the Accreditation or Licenses screens.



MINISTRY OF SOCIAL DEVELOPMENT
TE MANATŪ WHAKAHIATO ORA

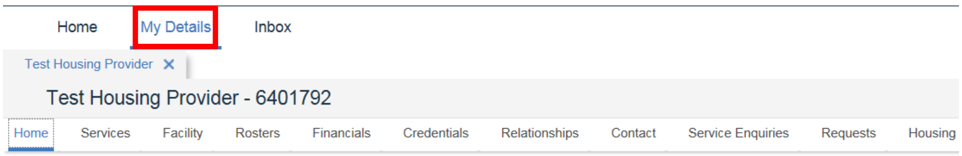
Viewing your own user account details

<table>
<tr><th>Description</th><th>Screenshot</th></tr>
<tr><td>

Step one

Log into Business Online Services and select ‘My Details’

</td><td>

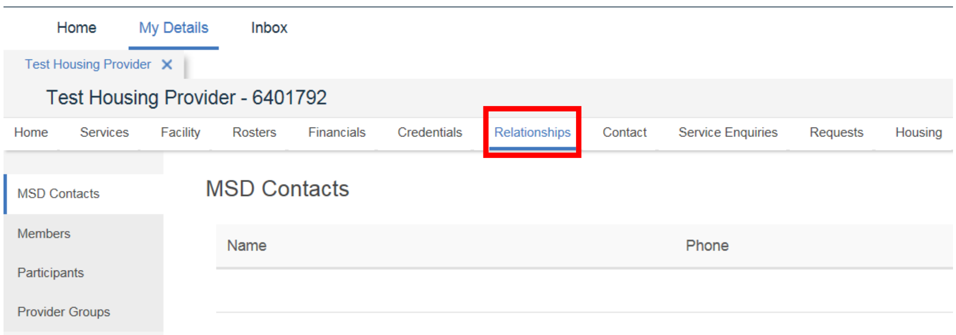


</td></tr>
<tr><td>

Step two

Select the ‘Relationships’ tab

</td><td>

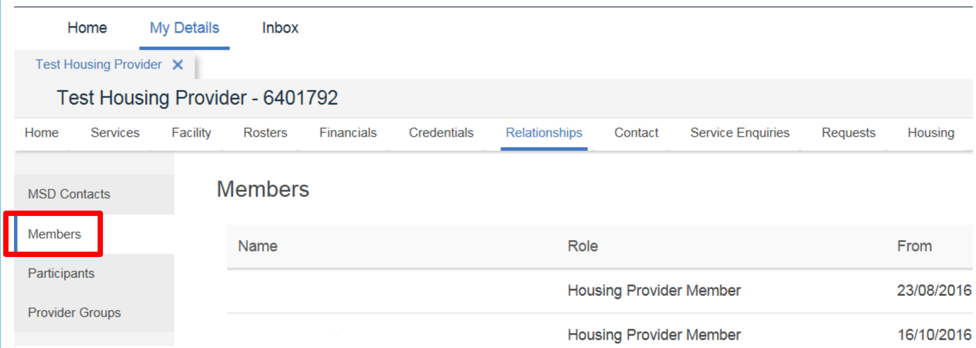


</td></tr>
<tr><td>

Step three

Select ‘Members’ from the menu on the left

</td><td>



</td></tr>
</table>

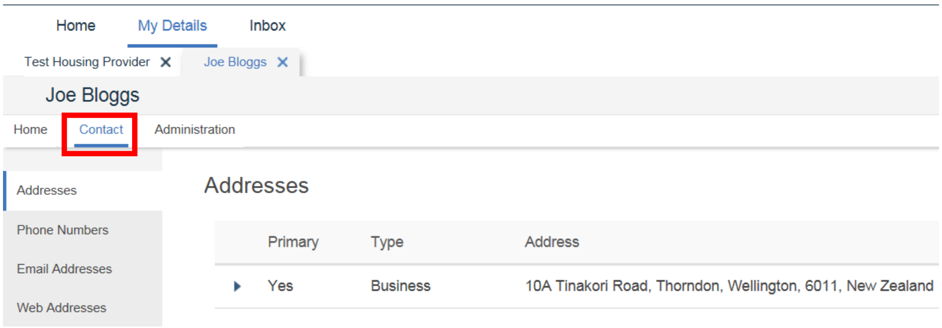
<table>
<tr><th>Description</th><th>Screenshot</th></tr>
<tr><td>

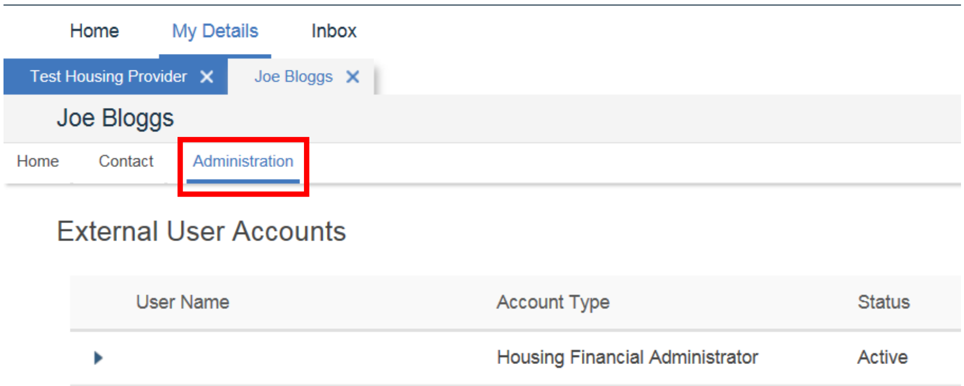
Step four

Select your name:

- The 'Contact' tab contains all your contact details e.g. postal address, phone number, email address
- The Administration tab contains your user account details and can only be viewed by an Administrator

</td><td>

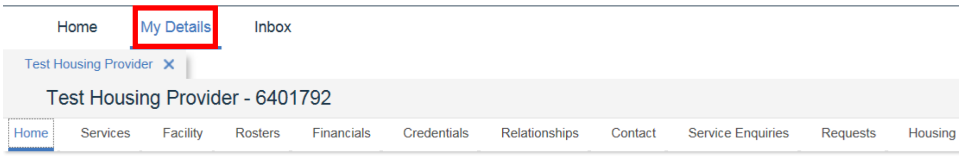
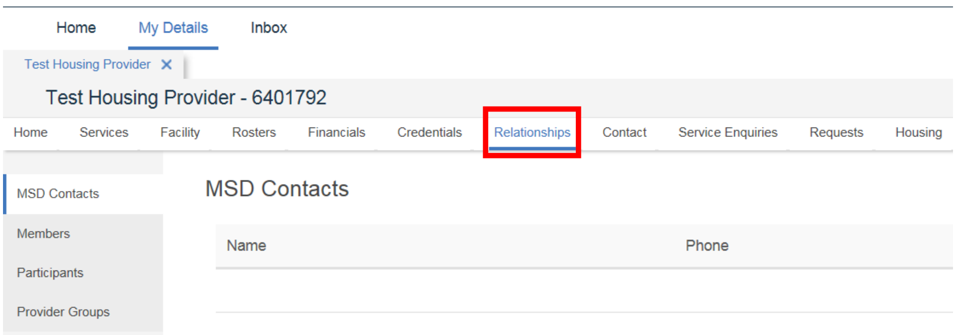
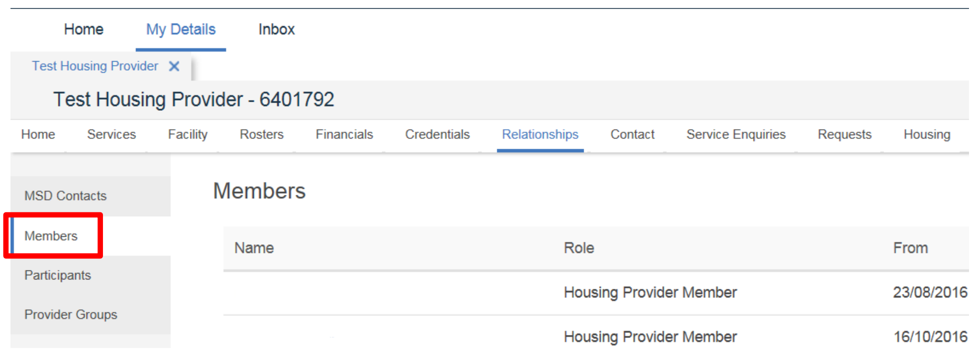
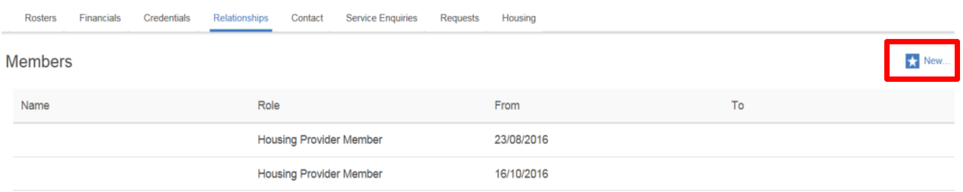




</td></tr>
</table>

Creating a new user account – ADMINISTRATOR ONLY

Administrator and Financial Administrator roles can create user accounts by following these steps:

Description	Screenshot
Step one Log into Business Online Services and select ‘My Details’	
Step two Select the ‘Relationships’ tab	
Step three Select ‘Members’ from the menu on the left	
Step four Select ‘New’ from the ‘Members’ tab	

Description	Screenshot

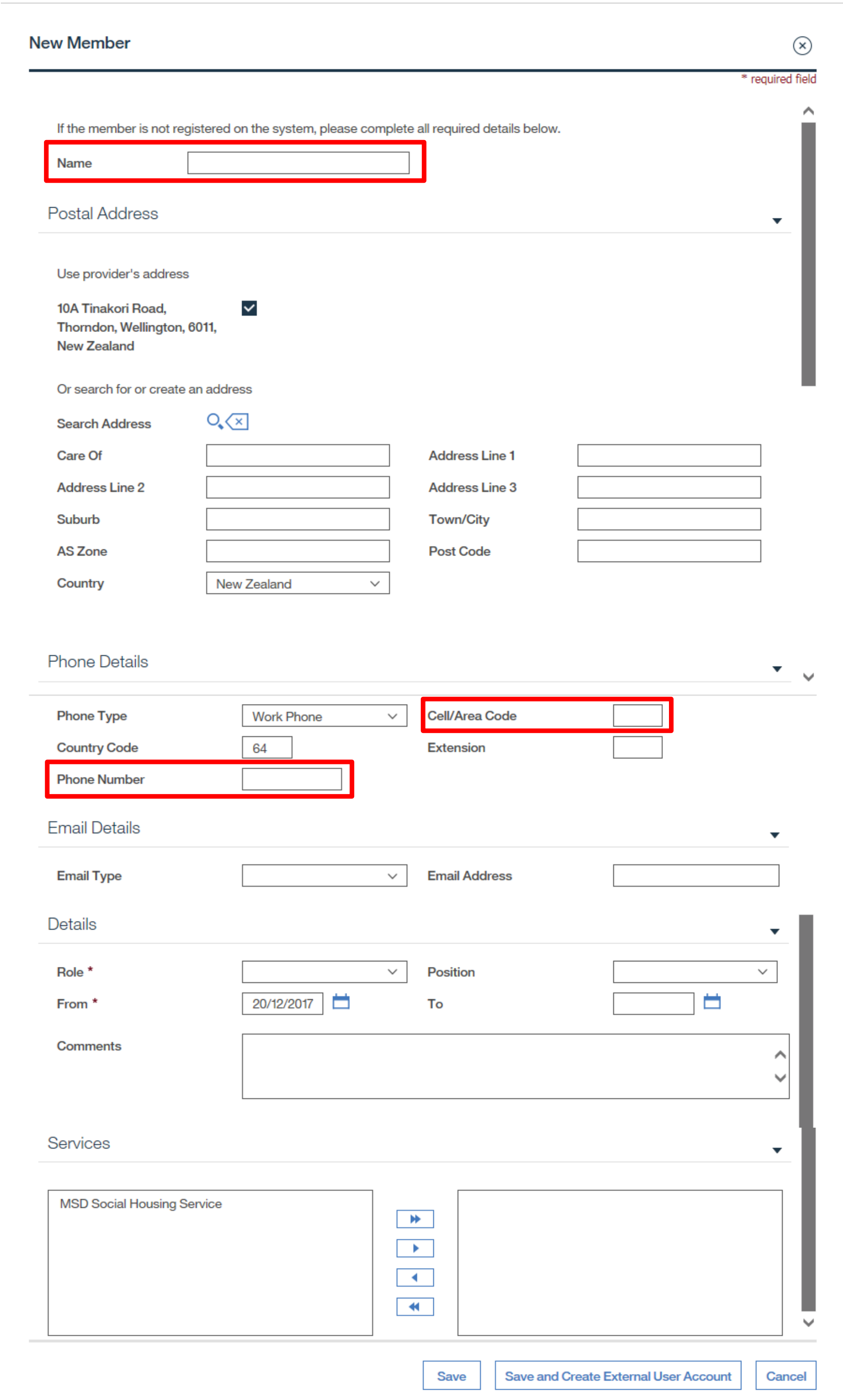
Step five

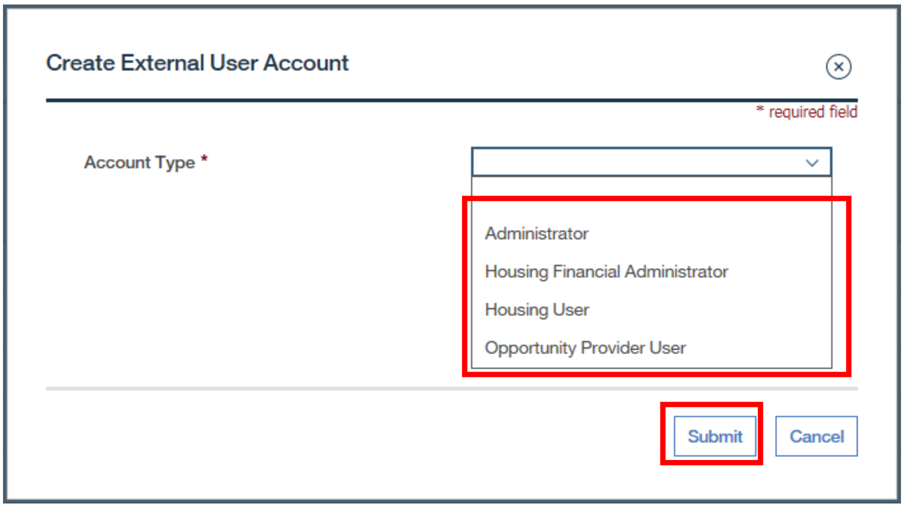
Enter the mandatory details – Name, phone number and email address

The phone type must be set to cell phone number

The phone number must be entered as follows:

- ‘Area Code’ must contain the cell phone network number e.g. 021 / 027 etc
- Enter the remainder of the number into the ‘Phone Number’ field

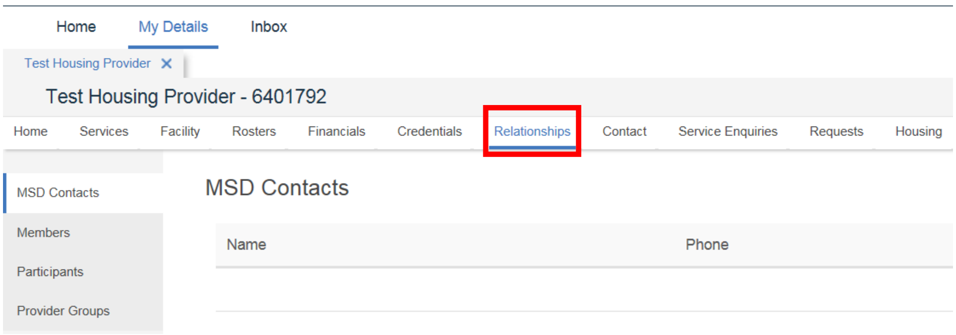
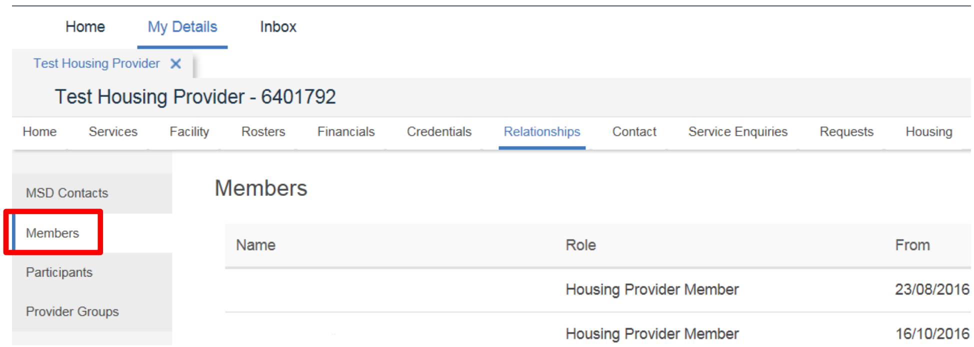
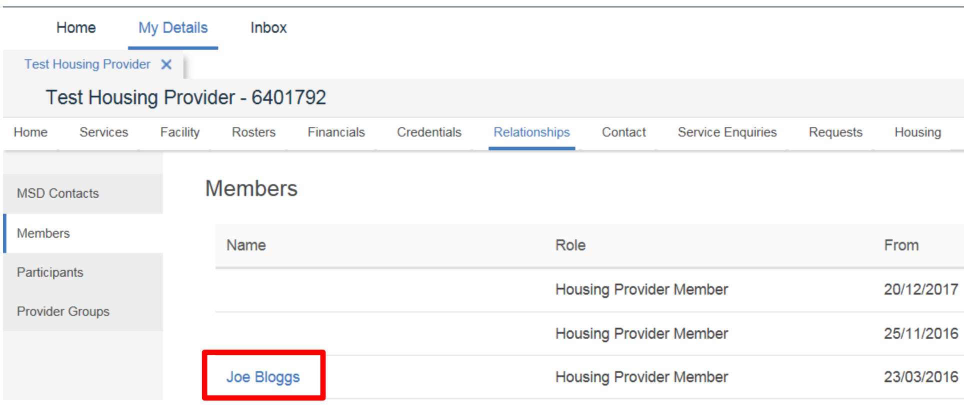


Description	Screenshot
Step six Once you have entered all the details, select 'Save and Create External User Account'	
Step seven When prompted for the 'Account Type', select the appropriate role from the drop-down box and select 'Submit' Note: Please ignore the 'Opportunity Provider User'	

Note: The email and cell phone number are important as the user's MSD reference code will be sent to their email address, the one-time password will be sent to their cell phone number the first time they log in; both of these values are required every time you logon.

Updating user’s contact details – ADMINISTRATOR ONLY

Administrator and Financial Administrator roles can update user’s contact details by following these steps:

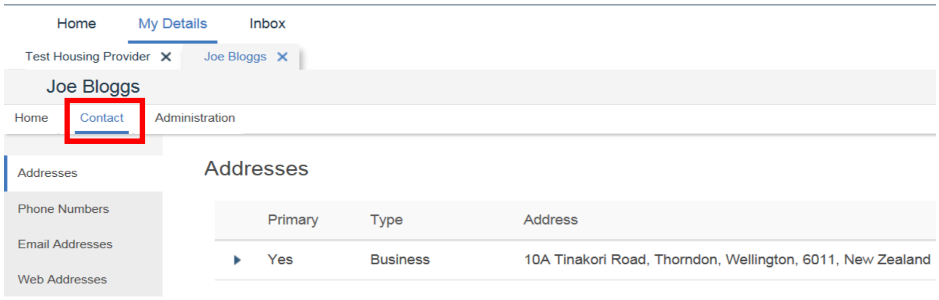
<table>
<tr><th>Description</th><th>Screenshot</th></tr>
<tr><td>Step one
Select the ‘Relationships’ tab</td><td>
</td></tr>
<tr><td>Step two
Select ‘Members’ from the menu on the left</td><td>
</td></tr>
<tr><td>Step three
Select the user’s name</td><td>
</td></tr>
</table>

<table>
<tr><th>Description</th><th>Screenshot</th></tr>
<tr><td>

Step four

Select the ‘Contact’ tab

</td><td>



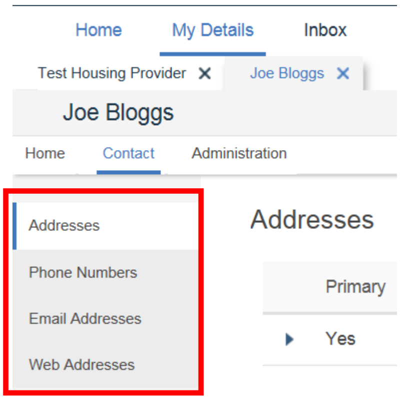
</td></tr>
<tr><td>

Step five

Select the item, from the menu on the left that you need to update e.g.

- Addresses
- Phone Numbers
- Email Addresses
- Web Addresses

</td><td>

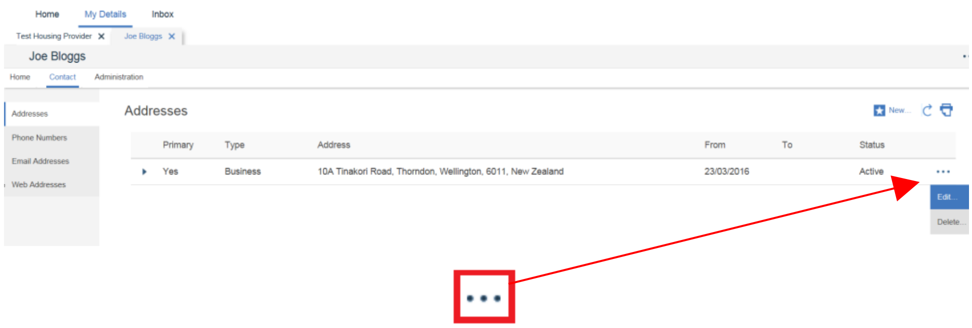


</td></tr>
<tr><td>

Step six

Select ‘Edit’ from the action menu for the address / number on the list

</td><td>

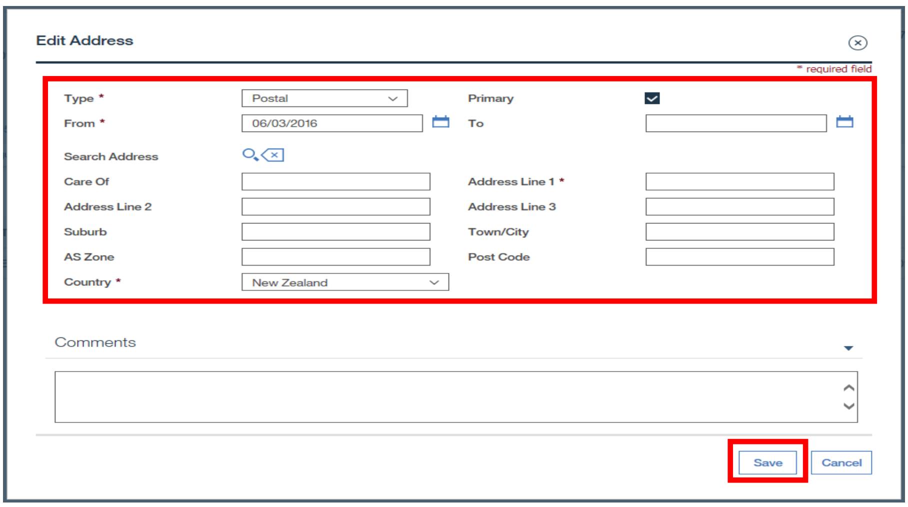


</td></tr>
<tr><td>

Step seven

Update details and select ‘Save’

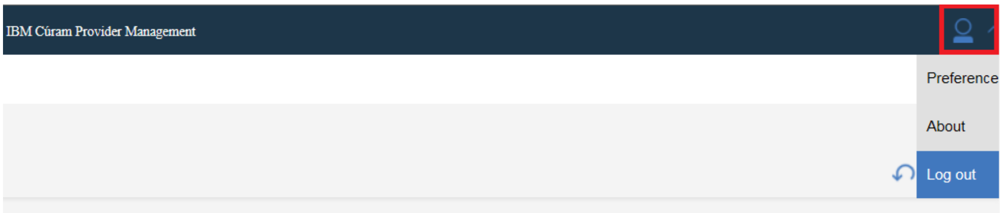
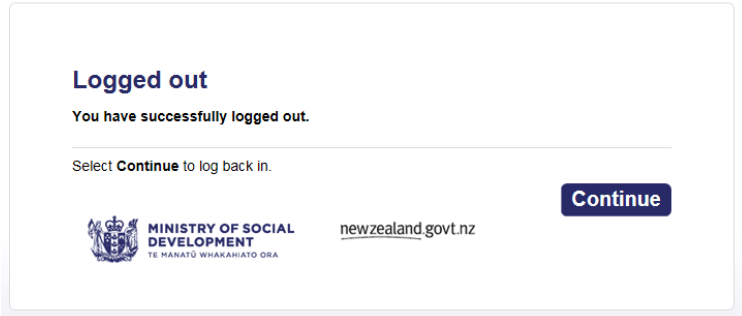
</td><td>



</td></tr>
</table>

Logging out of Business Online Services

Note: You should always log out before closing the browser.

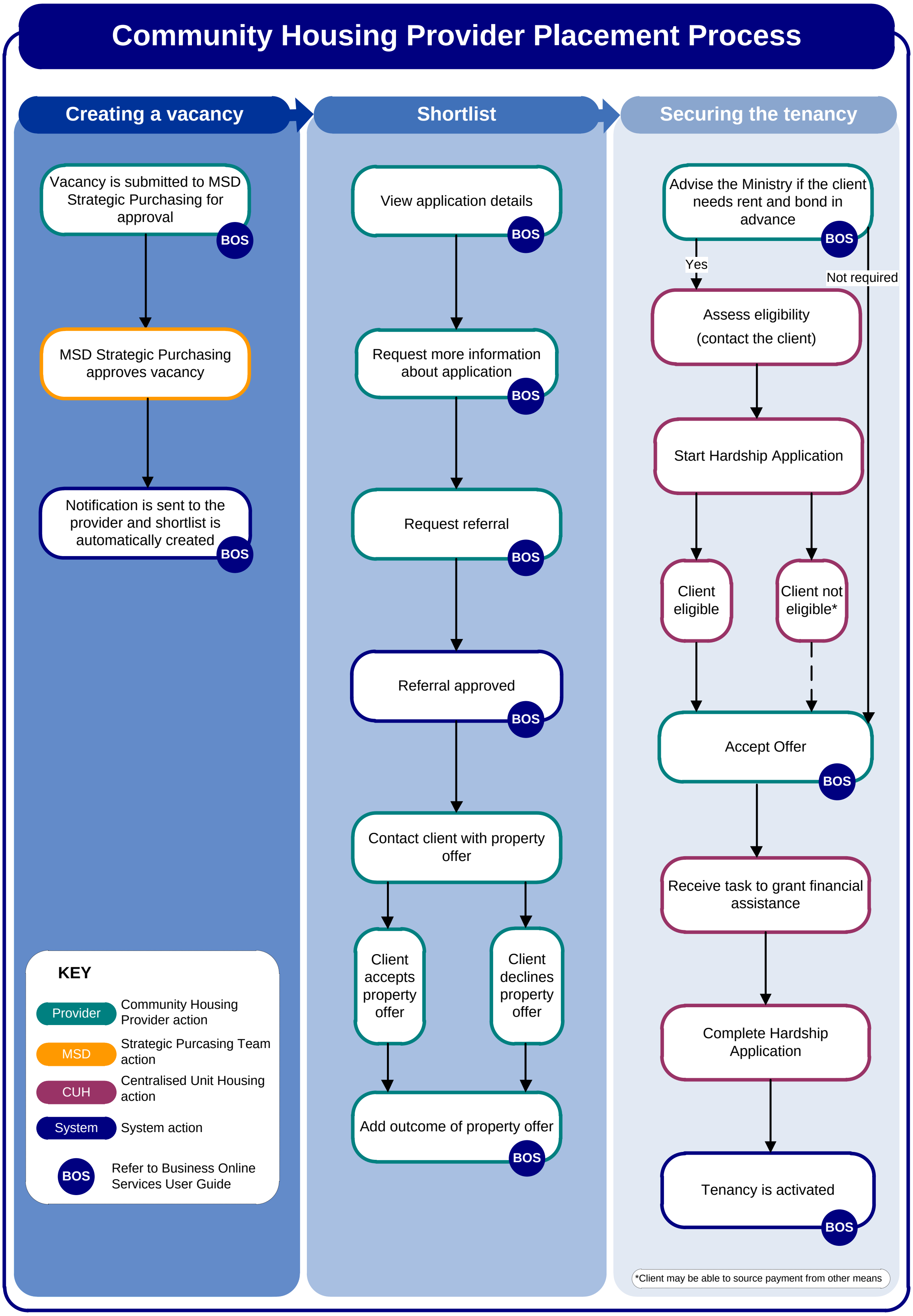
Description	Screenshot
Step one Select 'Log out'	
Once this screen displays, close the browser or select 'Continue' if you need to log back in	

Session time out

BOS will time out after fifteen minutes of inactivity. When this happens:

- any data you have entered without saving, will be lost
- the following message will display and you will have to log in again.

Part 2: Vacancy Management

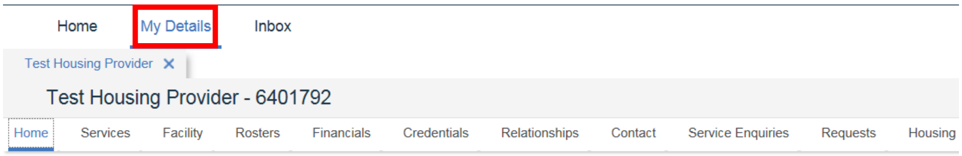
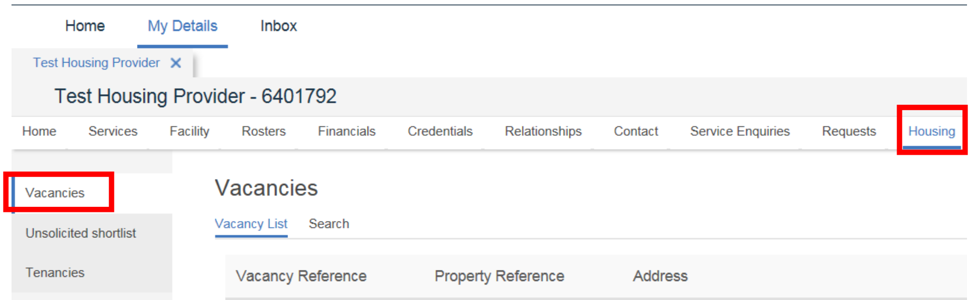
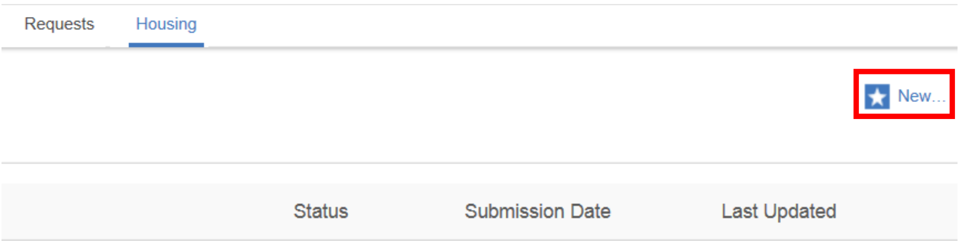


Submit a property vacancy

Once you have a property available, submit a vacancy request in order to receive a shortlist of applicants. As part of the vacancy request you have the option to specify the suitable tenant characteristics that will be included in the shortlist generated by the system. Strategic Purchasing will approve or decline the vacancy within 48 hours, or contact you if more information is required.

The shortlist will be generated automatically and is based on the property profile and any preferred tenant criteria identified by you – see Appendix C for the Social Housing matching rules.

To create a property vacancy:

Description	Screenshot
Step one Log into Business Online Services and select 'My Details'	
Step two Select the 'Housing' tab and then 'Vacancies' from the left-hand side menu	
Step three Select 'New' from the 'Vacancy List' screen	

Description	Screenshot

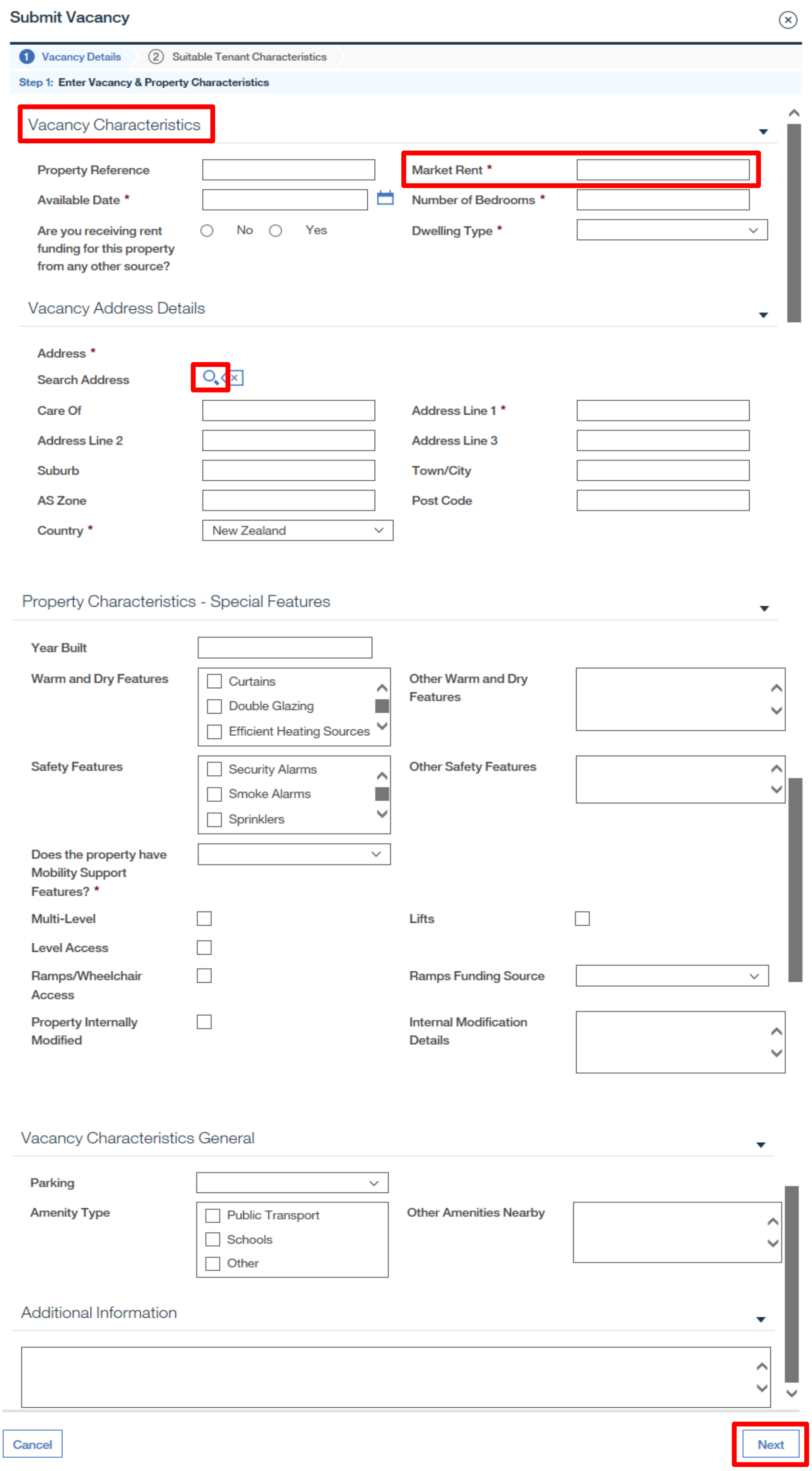
Step four

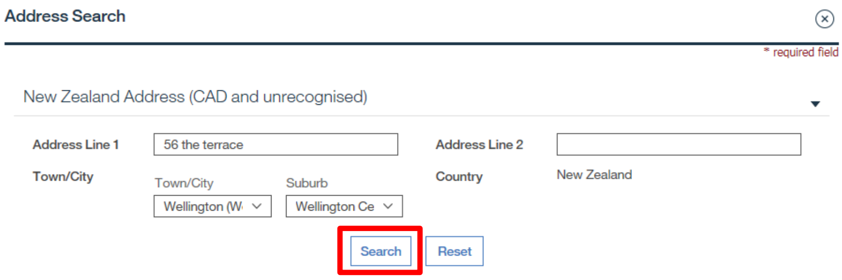
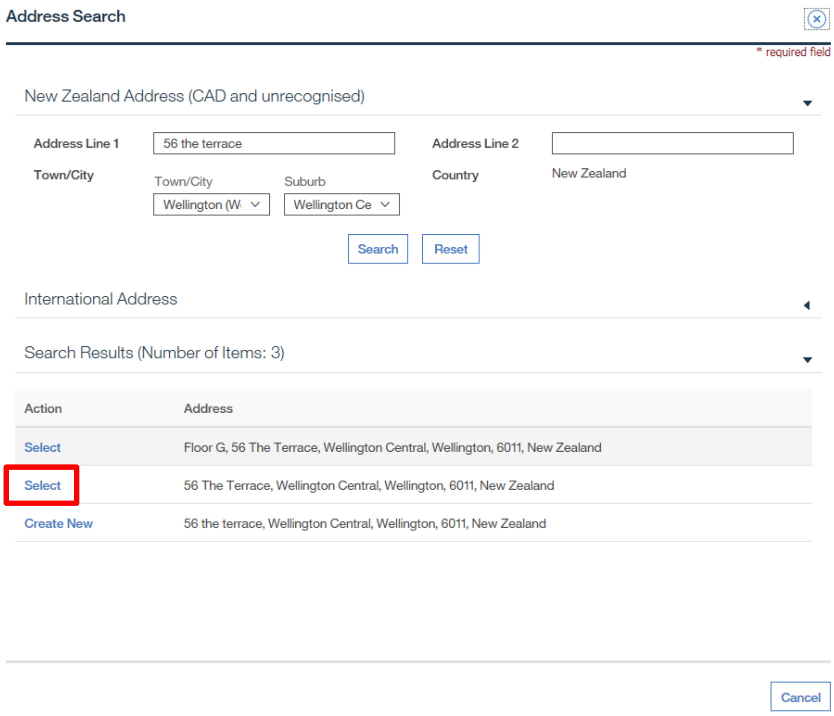
Fill in the vacancy details then select 'Next'

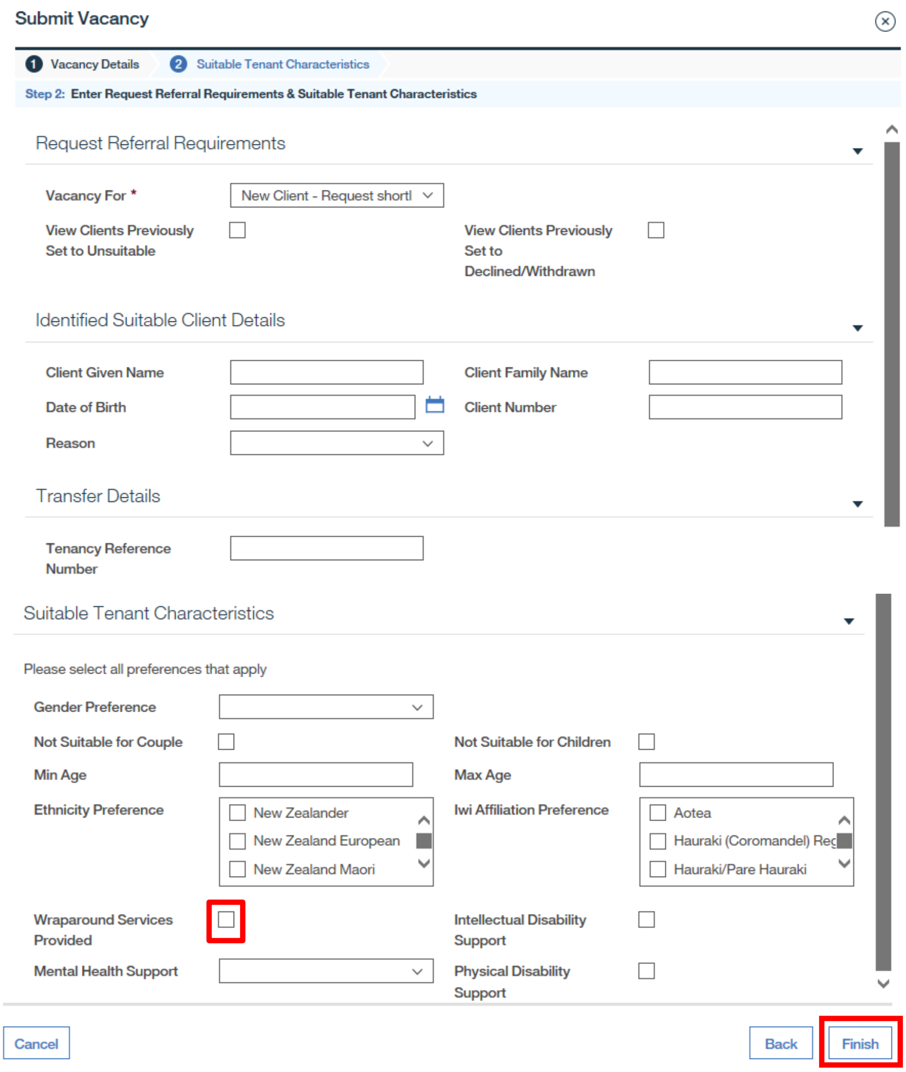
Note: If any of the mandatory fields are left blank, error messages will display at the top of the 'Submit Vacancy' screen. Otherwise the 'Suitable Tenant Characteristics' screen displays

It is recommended all property details are included in each vacancy request, e.g. efficient heating sources, insulation, year built

Vacancy address details must be searched using the magnifying glass



Description	Screenshot
If the address you are searching for is not already in the system you need to select ‘Create New’ Matching is based on post codes so post code accuracy is critical. Post codes can be found using the following website: https://www.nzpost.co.nz/tools/address-postcode-finder	 

Description	Screenshot
Step five Fill in the ‘Suitable Tenant Characteristics’ then select ‘Finish’ **Note:** The more criteria you enter in the ‘Suitable Tenant Characteristics’, the fewer results you will receive in your shortlist **Note:** The ‘Suitable Tenant Characteristics' screen closes and the suitable tenant characteristics are saved. If there are any error messages the ‘Suitable Tenant Characteristics' screen will redisplay with the error messages at the top of the screen. Otherwise the 'Vacancy List' screen displays If the ‘Wraparound Services Provided’ box is ticked clients who **only** want housing with a supervisor will be selected	

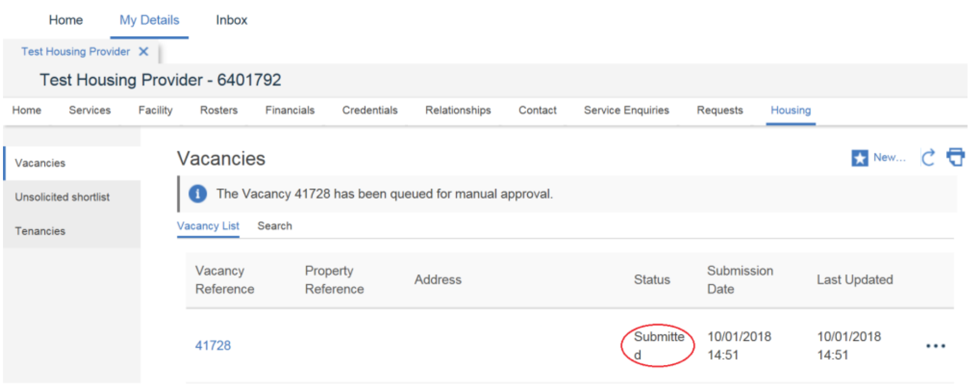
<table>
<tr><th>Description</th><th>Screenshot</th></tr>
<tr><td>

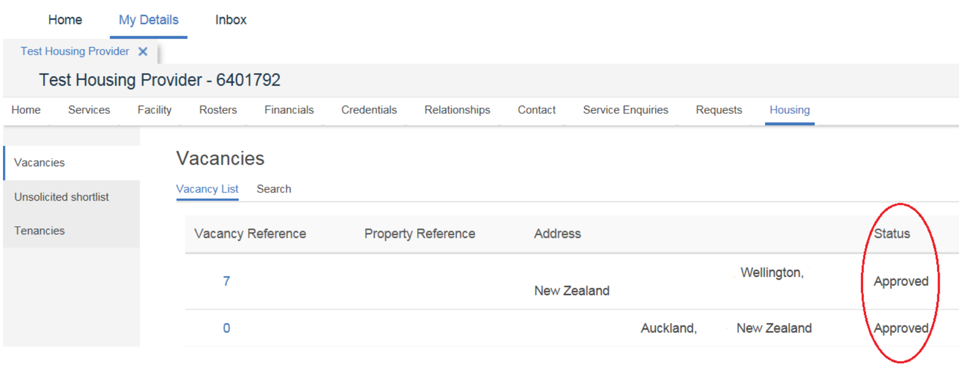
Step six

You will see the vacancy status is ‘Submitted’ on the 'Vacancy List' screen

If you have an administrator role, you will receive a notification when the approval process is complete – see the Notifications processes

</td><td>





</td></tr>
</table>

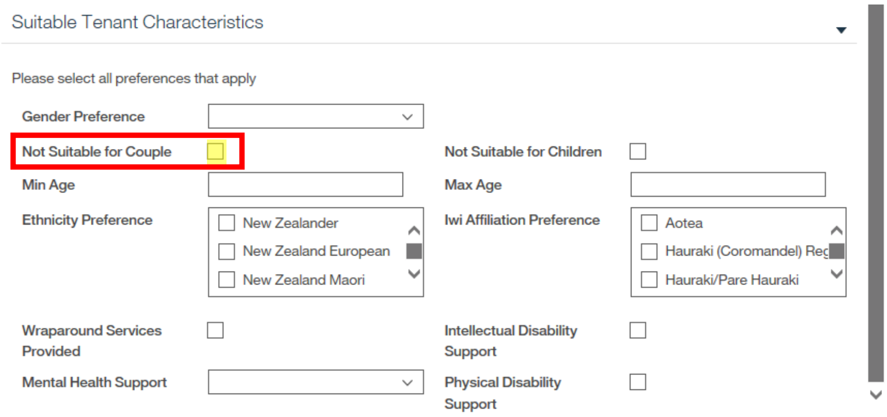
Vacancy details captured (* indicates a mandatory field)

- A unique property reference - this **cannot** be edited or amended so ensure it is accurate and relevant
- The proposed market rent for the property*
- The date the property is available*
- Number of bedrooms*
- Whether provider is receiving rent funding for the property from any other source*
- Dwelling type (i.e. apartment, flat, house, or room)*
- Address*
- Year built
- Warm and dry features (e.g. insulation, double glazing, efficient heating sources)
- Safety features (e.g. smoke alarms, security alarms)
- Mobility support features* (e.g. modified, not modifiable)
- Internal property modifications
- Accessibility (e.g. level access, steps, wheelchair ramp)
- Parking
- Nearby amenities
- Additional information (free text field)

Suitable tenant characteristics and Identified Suitable Clients

(* indicates a mandatory field)

- Vacancy For* - Whether you wish to place a new client from the housing register (New Client – Request shortlist, is the default value), or have a specific client in mind for the vacancy (Identified Suitable Client), or intend to transfer one of your existing tenants (Transfer).
- If the vacancy is for an identified suitable client (i.e. someone who is already known to you), you must supply the client's name, date of birth, client number, and a reason for specifying the client.
- If the vacancy is for a transfer (within your own stock), you must supply the tenancy reference for the existing tenancy and create a provider initiated transfer task using the BOS template to advise the Ministry of the details of the tenancies that are transferring.
- If the vacancy is for a transfer (between providers), the new provider must supply the tenancy reference for the new tenancy and the primary provider must create a provider initiated transfer task using the BOS template to advise the Ministry of the details of the provider to provider transfer.
- If the vacancy is for either a new client, or an identified suitable client, a shortlist will be generated. You may specify other suitable tenant characteristics when the shortlist is generated.
  - Gender (typically used only where there are specific reasons to restrict the property to one gender, e.g. when letting rooms in a shared house)
  - Whether the vacancy is unsuitable for couples and/or children. **Note:** Due to an error in the system unsuitable couples may not always work as intended
  - Minimum and maximum age of occupants (e.g. for youth, or aged accommodation)
  - Ethnicity preference
  - Iwi affiliation preference, (only used when Māori has been specified as an ethnicity)
  - Whether you offer wraparound services (only clients who have indicated that they would only be willing to be housed in a property that has a supervisor attached to the property will be matched if this is selected)
  - Whether you offer mental health and disability support, including details of the type of mental health support offered, if applicable (only clients who have indicated that they require this support will be matched if this is selected).

<table>
<tr><th colspan="2">Vacancy details captured (* indicates a mandatory field)</th></tr>
<tr><td>Note: The ‘Not Suitable for Couple’ field</td><td>


If you have set 'Not Suitable for Couple' to Yes, (e.g. you do not want to house couples) you will receive applications that have two applicants - therefore potentially a couple.
The process to manage this is:
1. If determined that the applicant has a partner, follow the process to mark the client as ‘Unsuitable’ (see section ‘Mark a shortlisted application as unsuitable’)
2. Refresh shortlist to receive and view more records.
</td></tr>
</table>

View the shortlist for a vacancy

You will receive a shortlist of clients as soon as your property vacancy is approved.

The shortlist will generate automatically based on the property profile and any preferred tenant criteria identified by you – see Appendix C for the matching rules.

The shortlist will display fast-track clients first (in order of priority), followed by all other suitable matched clients in order of their priority rating.

The shortlist will display as a list of clients on the 'Suitable Tenant Characteristics' tab of your vacancy. The shortlist will give you sufficient information to determine client suitability including the following key information about the client and their household:

- application reference
- client names
- number of bedrooms required
- property modification indicator
- priority rating (including fast track).

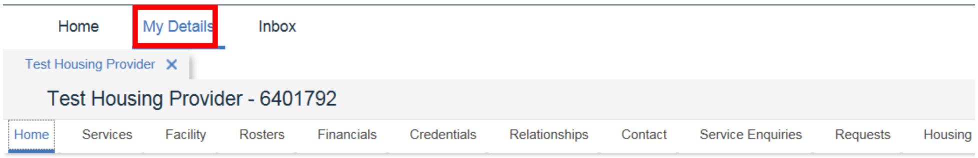
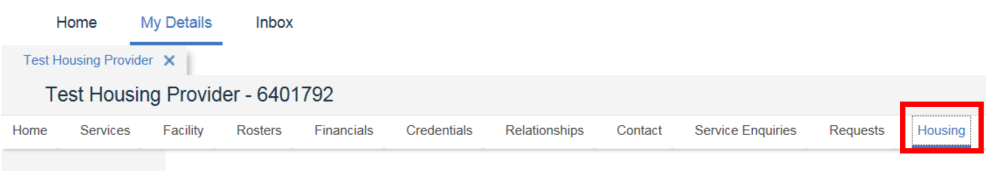
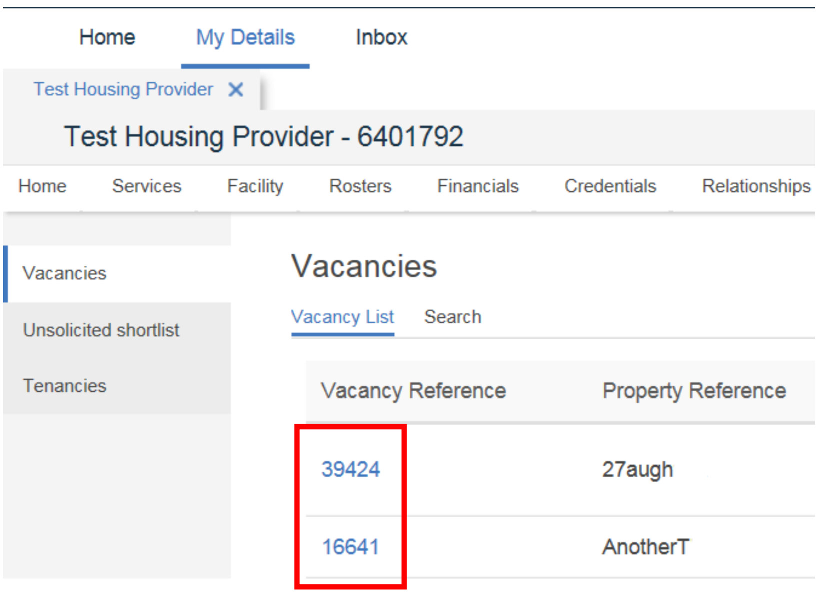
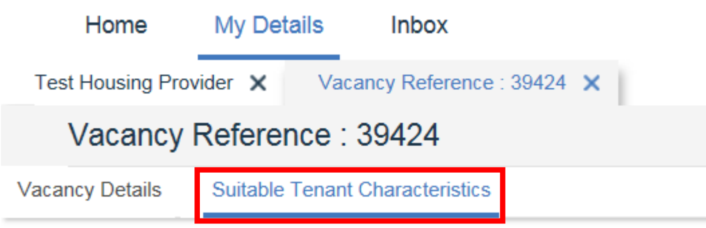
You may also receive additional information relating to the following:

- agent
- letting areas
- health and disability
- other Housing requirements, e.g. gang affiliated (to avoid being housed near a rival gang), pets, etc
- household risks
- risk information about the person.

The shortlist contains up to 30 applications. From this shortlist your users will have the ability to distinguish between those referred to them who they think will be a good match and those that they believe will be unsuitable.

If no suitable clients can be shortlisted, BOS will display the message "No matches have been found, please update the Suitable Tenant Characteristics for this vacancy".

To view the shortlist:

Description	Screenshot
Step one Log into Business Online Services and select 'My Details'	
Step two Select the 'Housing' tab	
Step three From the 'Vacancies' menu select the 'Vacancy Reference' link	
Step four Select the 'Suitable Tenant Characteristics' tab	

<table>
<tr><th>Description</th><th>Screenshot</th></tr>
<tr><td>Step five

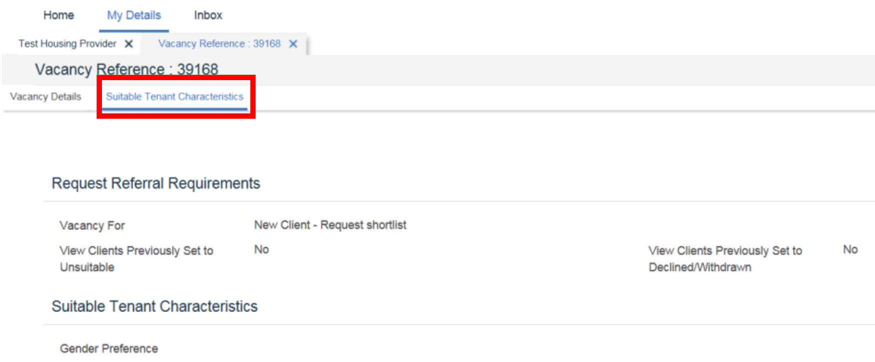
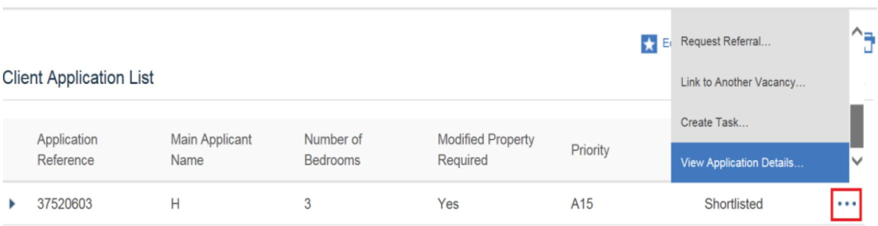
Your shortlist will be displayed under the ‘Client Application List’</td><td>Client Application List
<table>
<tr><th>Application Reference</th><th>Main Applicant Name</th><th>Number of Bedrooms</th><th>Modified Property Required</th><th>Priority</th><th>Status</th></tr>
<tr><td>37520603</td><td>H</td><td>3</td><td>Yes</td><td>A15</td><td>Shortlisted</td></tr>
<tr><td>20340085</td><td>A</td><td>3</td><td>Yes</td><td>A11</td><td>Shortlisted</td></tr>
<tr><td>37458443</td><td>I</td><td>3</td><td>Yes</td><td>B10</td><td>Shortlisted</td></tr>
<tr><td>40891389</td><td>J</td><td>3</td><td>Yes</td><td>B0</td><td>Shortlisted</td></tr>
</table></td></tr>
<tr><td>Step six

The identified suitable client list, if there is one, will display under ‘Identified Suitable Client’</td><td>Identified Suitable Client
<table>
<tr><th>Application Reference</th><th>Main Applicant Name</th><th>Number of Bedrooms</th><th>Modified Property Required</th><th>Priority</th><th>Status</th><th>Reason suitable</th></tr>
<tr><td>36232582</td><td>A</td><td>3</td><td>Yes</td><td>A0F</td><td>Shortlisted</td><td>Client Already in Service</td></tr>
</table></td></tr>
</table>

View the application details of a shortlisted client

The application details of a shortlisted client will give you sufficient information to determine client suitability including the following key information about the client and their household.

Steps to view:

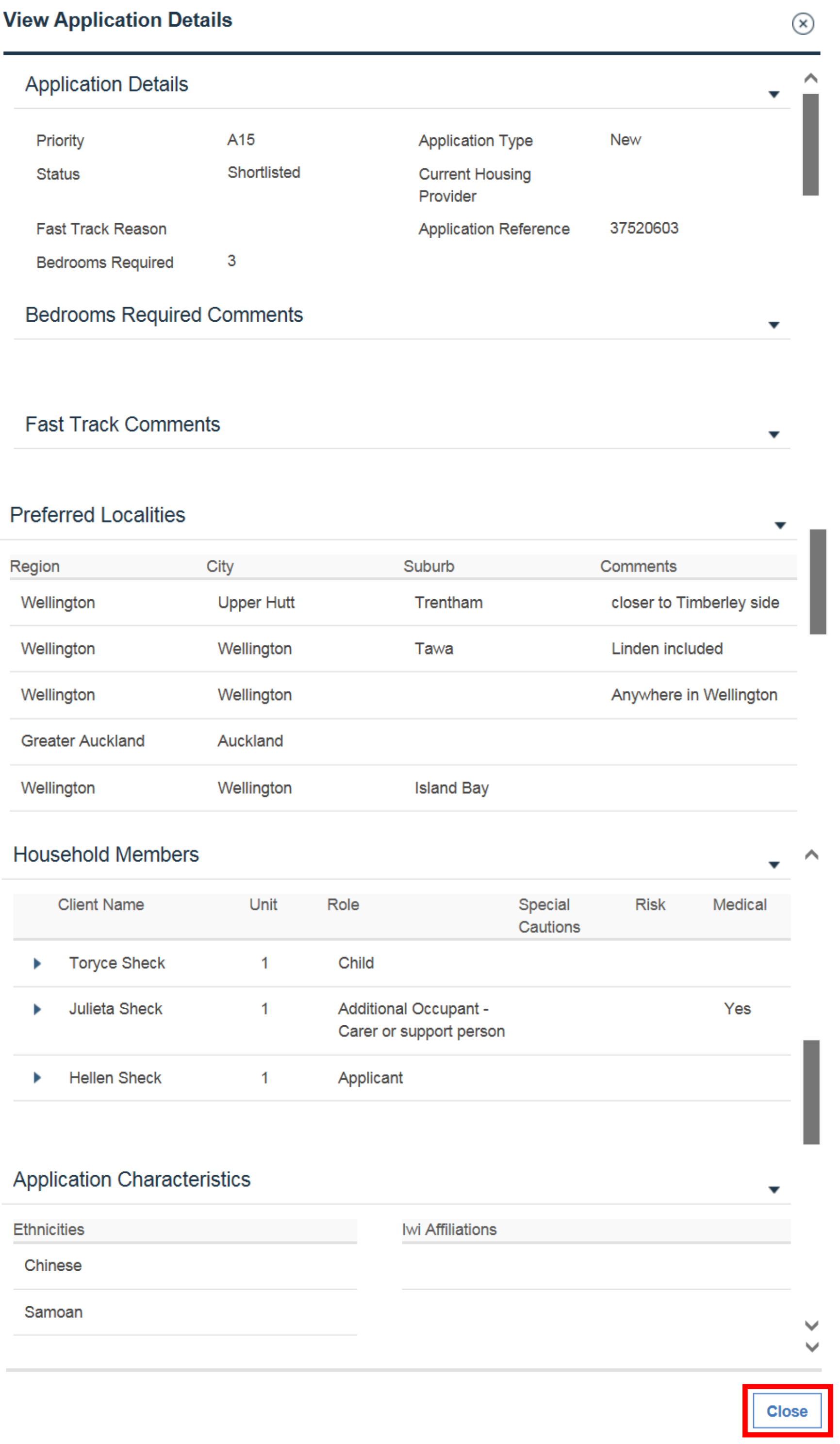
Description	Screenshot
Step one Navigate to the 'Suitable Tenant Characteristics' tab for the vacancy	
Step two Select 'View Application Details' from the action menu for the application on the client list	

<table>
<tr><th>Description</th><th>Screenshot</th></tr>
<tr><td>

Step three

Select ‘Close’

</td><td>



</td></tr>
</table>

By selecting 'View Application Details' for a client on the shortlist, you can see the following information, providing we hold it:

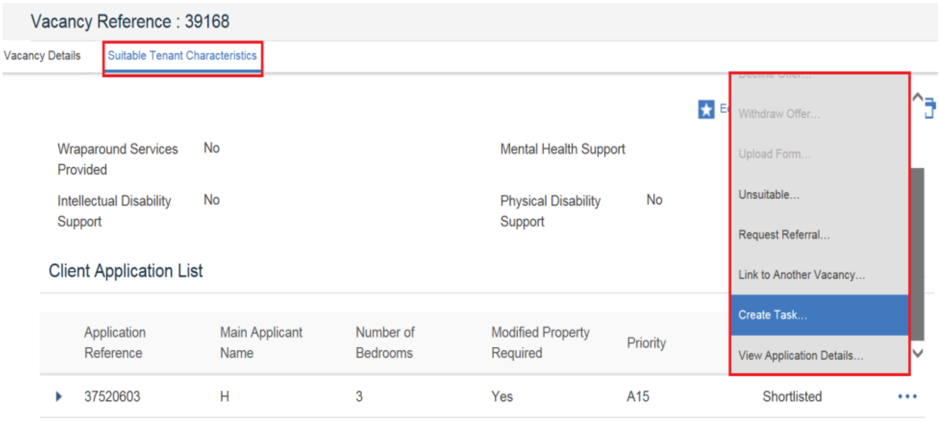
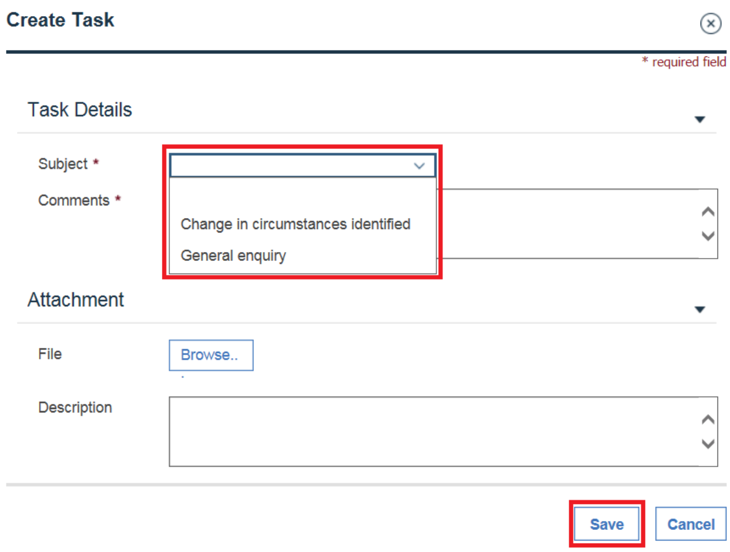
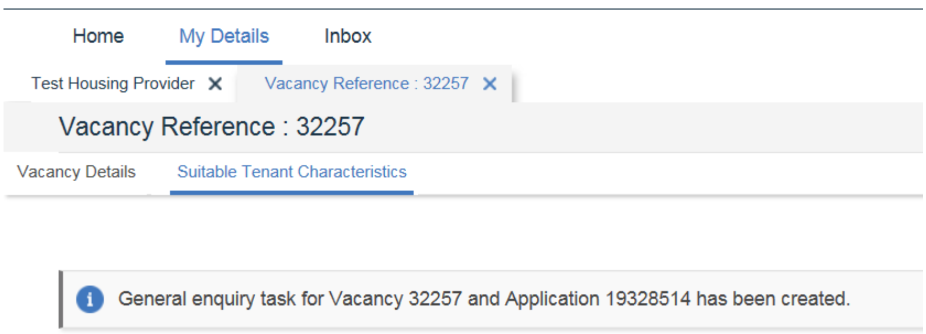
- number of bedrooms required and comments regarding any additional bedroom requirements
- preferred location
- access required
- ethnicity
- iwi
- whether an interpreter is needed
- language
- hearing impairment
- visual impairment
- health and disability conditions
- housing modification required
- whether household includes a child sex offender
- whether any member of the household has a Risk Indicator
- whether any member of the household has Special Cautions.

Information provided at the shortlist stage will not include the client's contact details and the calculated provisional rate of Income-Related Rent (IRR).

Request more information about an application

In some circumstances, the information that is automatically provided may be incomplete or insufficient for you to determine if the application may be an appropriate match.

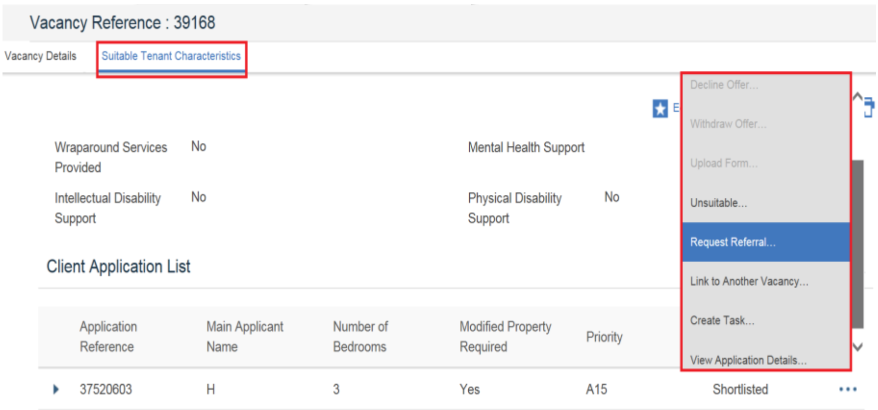
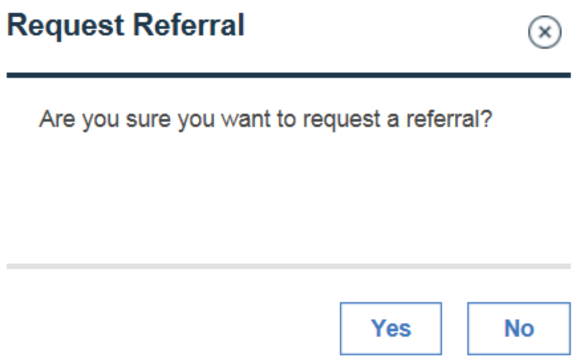
To request more information that the Ministry may hold:

Description	Screenshot
Step one Navigate to the 'Suitable Tenant Characteristics' tab for the vacancy **Select 'Create a Task'** from the action menu for the application on the client list	
Step two Select 'General Enquiry' as the subject from the drop-down box Enter comments, attach a file as supporting information if required and select 'Save'	
The following message will display when this is completed	

Request the referral of a shortlisted application

After you have identified from the shortlist that an applicant may be suitable for your property, you need to request a referral for that application. **While an application is referred to you, the client will not feature on any other shortlist and no other provider can make an offer to that client.**

To request a referral:

Description	Screenshot
Step one Navigate to the 'Suitable Tenant Characteristics' tab for the vacancy Select 'Request Referral' from the action menu for the application on the client list	
Step two Select 'Yes'	
When a referral is approved, you will receive an on-screen notification advising that the request for the referral has been approved	

When you view the 'Application Details' screen, it will contain the contact details for the client and their agents, if any, the most recently calculated provisional rate of IRR and whether or not the clients have pre-applied for assistance to pay bond and rent in advance.

If the client has been taken off the register or the vacancy does not have a status of ‘Approved’ (e.g. it has been withdrawn), the referral request will be automatically declined. You will receive an on-screen notification advising that the request for the referral has been declined. It will also give the reason why it has been declined.

If the referral can’t be automatically approved or declined, you will see the status as ‘Request Referral’. This means that there is something about the application that needs to be looked at to determine if the referral is appropriate.

For example this will occur when requesting a referral when there is a Child Sex Offender included in the application. Once the referral is requested, the Centralised Unit Housing (CUH) will receive a task. CUH will contact the Department of Corrections and follow up. Corrections will then have to approve the referral (once the satisfactory criteria have been met) and will let the CUH know. The CUH will email you advising that the referral has been approved. The CUH will also request Strategic Purchasing to change the status of the referral to ‘Provisional Offer Approved’, which is done manually and will trigger a notification that will allow you to continue with the placement process.

Note: You will only be able to see the client’s contact details, pre-applied rent and bond or IRR when the application has a status of ‘Provider Offer Approved’. **You should take note of these values at this time** as you will not be able to view them once the status changes to ‘Request Financial Assistance’ or ‘Accept Offer’

If you have an administrator role, you will receive a notification when the manual approval process is complete – see the Notifications processes for more on this.

MINISTRY OF SOCIAL DEVELOPMENT
TE MANATŪ WHAKAHIATO ORA

Advise the Ministry that the client needs assistance to pay bond and rent in advance

Discuss with the client whether or not they will need financial assistance for bond and rent in advance. If they require assistance you will need to advise the Ministry:

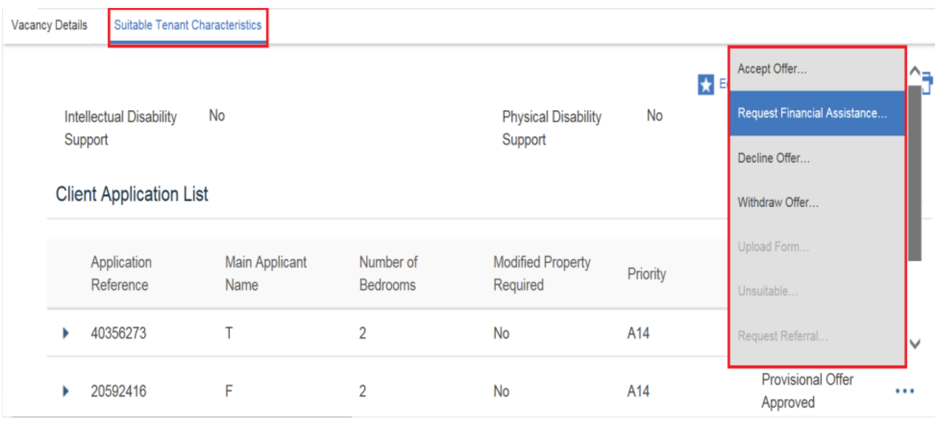
<table>
<tr><th>Description</th><th>Screenshot</th></tr>
<tr><td>

Step one

Navigate to the ‘Suitable Tenant Characteristics’ tab for the vacancy

Select ‘Request Financial Assistance’ from the action menu for the application

</td><td>



</td></tr>
<tr><td>

Step two

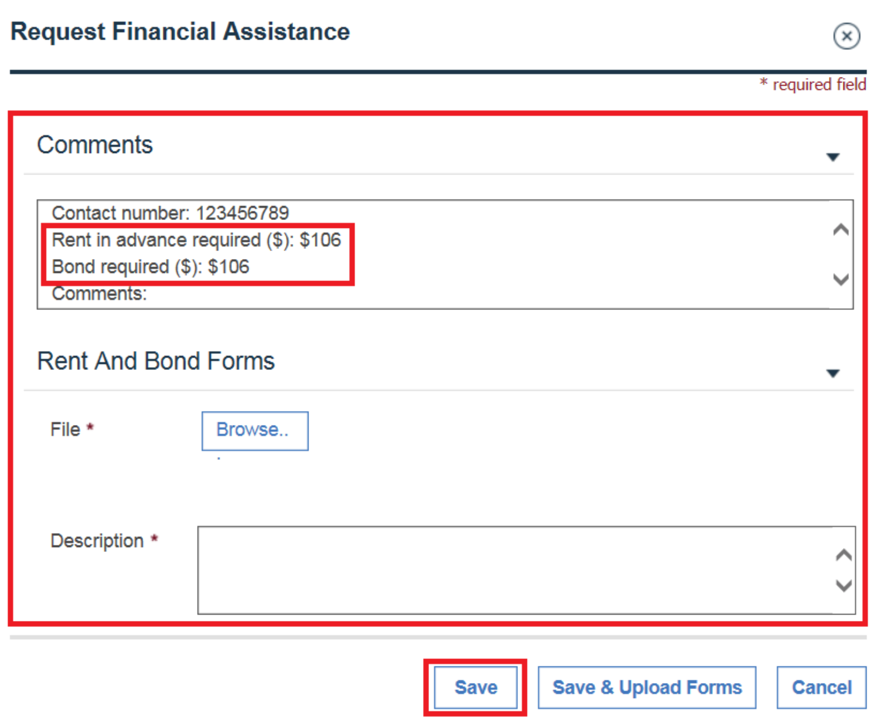
You will need to use the template Request Financial Assistance found in Appendix B

Ensure that you specify the rent and bond amount required

Attach a file, enter the description for the file and select ‘Save’

Note: When you are uploading a file to BOS the filename must be alphanumeric – it must only contain alphabetic characters, A to Z, and numerals, 0 to 9, it must not contain any spaces, e.g. a valid filename is 150526Invoice

</td><td>



Note: An application form is not required for the file upload, however the system needs a file attached in order to progress. Please attach a file in order to progress.

</td></tr>
</table>

Description	Screenshot
Once you have completed this step: • CUH staff will receive a task to contact the client and test eligibility • The hardship application is completed once you have selected ‘Accept Offer’ • The Ministry will only tell you if the financial assistance for rent and bond is declined, otherwise it will be paid once you have advised us that client has ‘Accepted Offer’. If the hardship application is declined the Ministry will send a message within 24 hours.	

Note: There are some instances where clients are required to attend an appointment at the nearest Work and Income service centre to apply for assistance with rent and bond.

You can find the eligibility criteria for this assistance on the Work and Income website through the following links:

http://www.workandincome.govt.nz/map/income-support/extra-help/advance-payment-of-benefit/index.html (for clients in receipt of benefit)

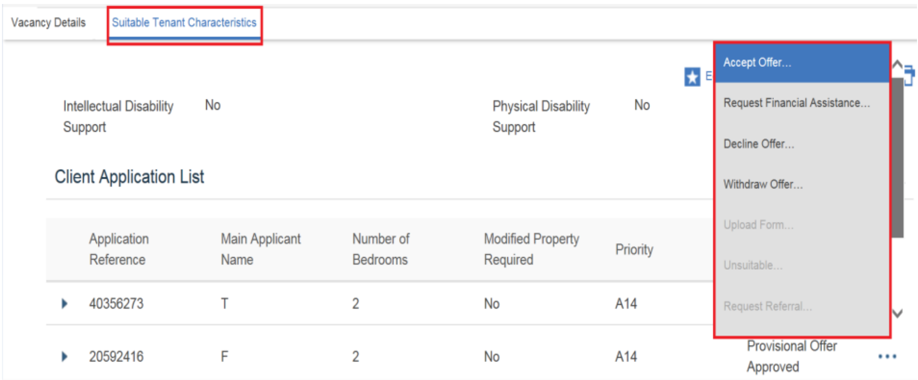
http://www.workandincome.govt.nz/map/income-support/extra-help/recoverable-assistance-payment/index.html (for people who are not in receipt of financial assistance from the Ministry)

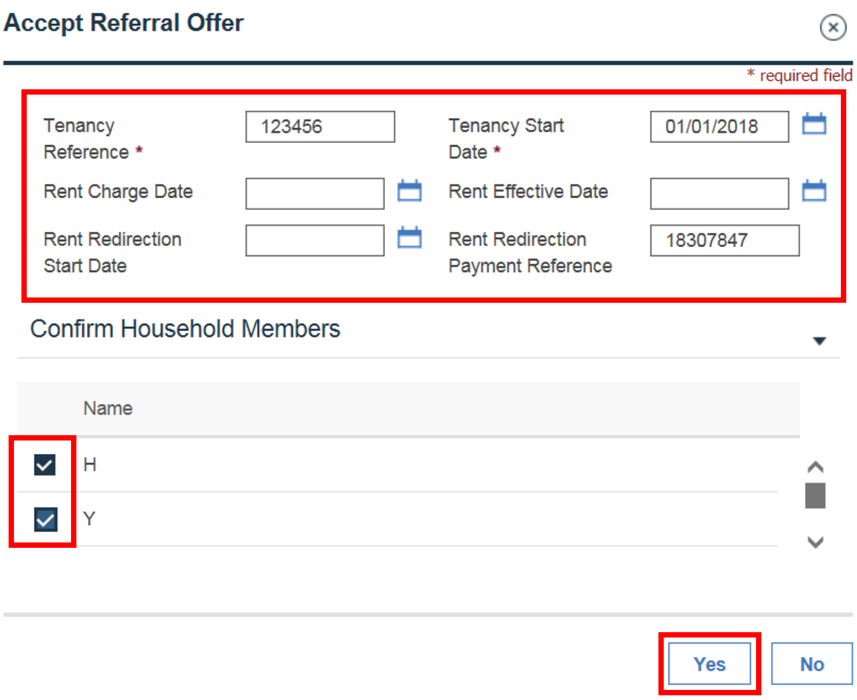
Advise the Ministry that a tenancy agreement has been signed

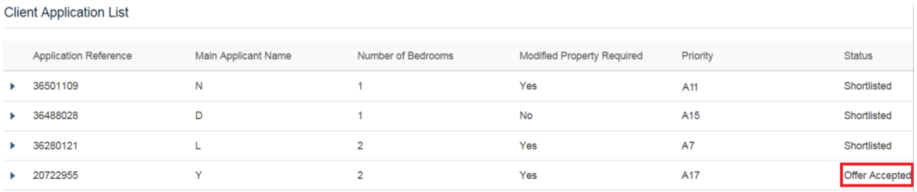
If you offer the property vacancy to applicants, and they accept the offer, you must inform the Ministry once everyone has signed the tenancy agreement and you have confirmed the tenancy start date and the rent amount.

When you move the client to 'Accept Offer' this generates a task for the Ministry to grant financial assistance for rent and bond if the client is eligible and assistance has been requested.

When you have all this:

Description	Screenshot
Step one Navigate to the 'Suitable Tenant Characteristics' tab for the vacancy Select 'Accept Offer' from the action menu for an application on the client list	

Description	Screenshot
Step two Fill in the tenancy agreement details including (*denotes mandatory fields): • Tenancy reference (It cannot be client names. Here you must enter your own useful reference for the tenancy. This reference number will be used on the IRRS fortnightly schedule that is generated for you, so make sure it's relevant for you)* • Tenancy start date* • Rent charge date (the day of the week that the rent is paid) • Rent effective date • Rent redirection start date • **Rent redirection payment reference** (a field for you to enter your own reference for redirected benefit payments) • Confirm Household Members – you must tick everyone who will live in the household Select 'Yes' **Note:** if there are any error messages – the 'Accept Referral Offer' screen redisplays with the error messages at the top of the screen	

<table>
<tr><th>Description</th><th>Screenshot</th></tr>
<tr><td>The ‘Suitable Tenant Characteristics’ screen will display and the referral status will now be ‘Offer Accepted’</td><td>
</td></tr>
<tr><td> Step three
Navigate to the tenancy screen to check the details of the new tenancy – see the ‘Tenancy Management’ process for how to do this

If there is anyone who will be living in the property that wasn’t on the list of household members, you need to advise the Ministry about this (you are not able to include anyone on the tenancy if they are not on the list of household members) – see the ‘Tenancy Management’ process
If there is anything else that the Ministry might need to know, then you need to advise the Ministry about this, e.g. start date is different from the original start date – see the ‘Tenancy Management’ process
</td><td>
</td></tr>
</table>

Note: There are some instances where a change in client's circumstances during the offer process may result a change in the provisional IRR.

MSD will inform you of the new provisional IRR via BOS Communications if a change is identified during this process.

This is so that the tenancy agreement can be updated and the new IRR is implemented from the start of the tenancy.

Below is what the BOS Communication looks like:

Communications

Subject	Type	Name	Communication Status	Date	Status
Change in IRR during offer process	Recorded	Test Housing Provider	Sent	21/12/2017	Active

Communication Text

Text

Hi

The following client has had a change in circumstances which has resulted in a change to the households indicative IRR during the offer process.

Client's name: A
Client number (SWN): 123456789
Tenancy Reference: ABC123456
Vacancy Reference: 123456
New IRR: $105

Please note: this new IRR will not change the amount of rent and bond payable, with the amount based on the original IRR at the time of offer.

Comments: N/A

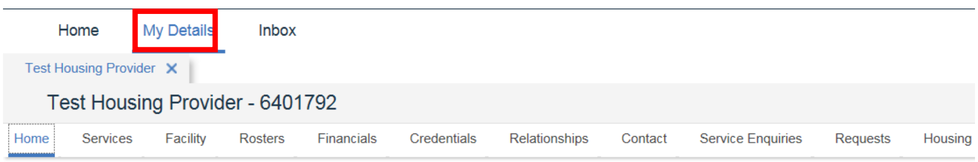
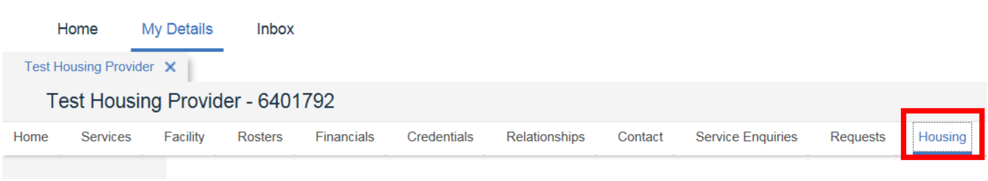
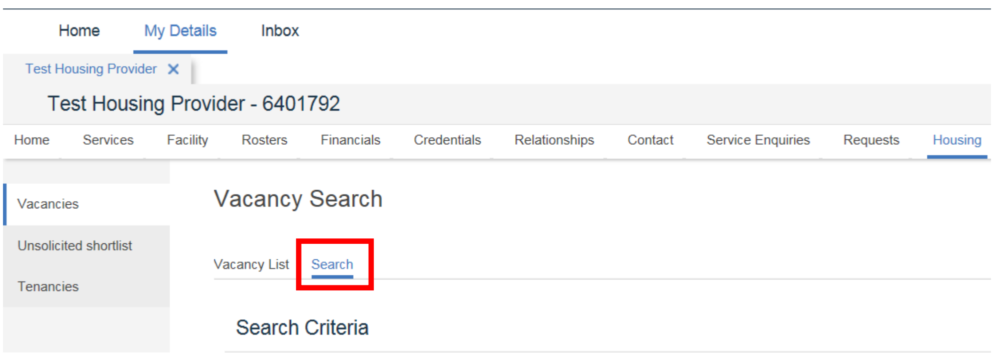
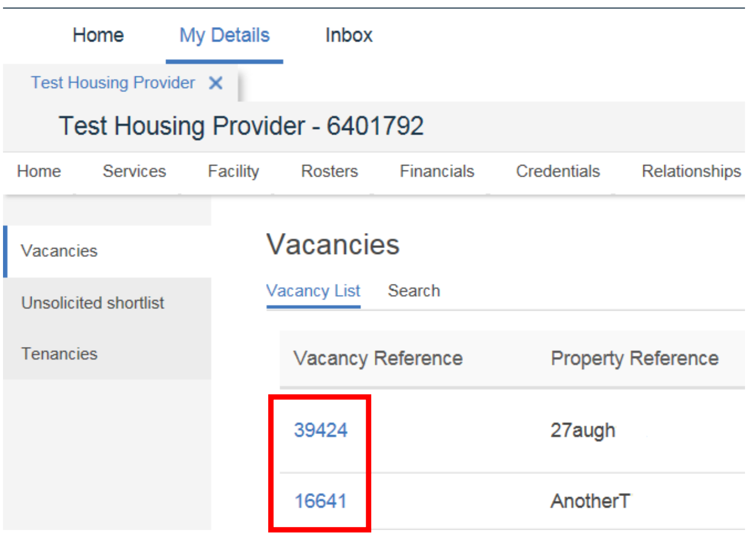
MINISTRY OF SOCIAL DEVELOPMENT
TE MANATŪ WHAKAHIATO ORA

Editing a property vacancy

Note that:

- a vacancy with a status of ‘Submitted’, ‘Declined’ or ‘Approved’ can be updated
- editing the vacancy will not refresh the shortlist
- if you update any details, your vacancy will need to be approved again. When your vacancy is re-approved, the shortlist will not be refreshed unless you manually refresh it.

Steps to edit vacancy details:

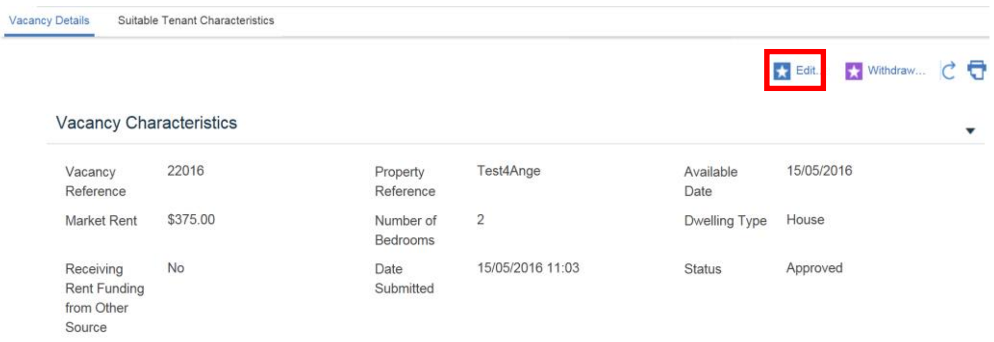
Description	Screenshot
Step one Log into Business Online Services and select ‘My Details’	
Step two Select the ‘Housing’ tab	
Step three Locate the vacancy by either: Searching for it, by clicking on the ‘Search’ tab: • Entering the search criteria and selecting ‘Search’ • And selecting the vacancy by clicking on the vacancy reference number hyperlink, Or locating it in the vacancy list and selecting the vacancy by clicking on the vacancy reference number hyperlink	

<table>
<tr><th>Description</th><th>Screenshot</th></tr>
<tr><td>

Step four

Select ‘Edit’ from the action menu on the Vacancy List screen or on the Vacancy Details screen

</td><td>



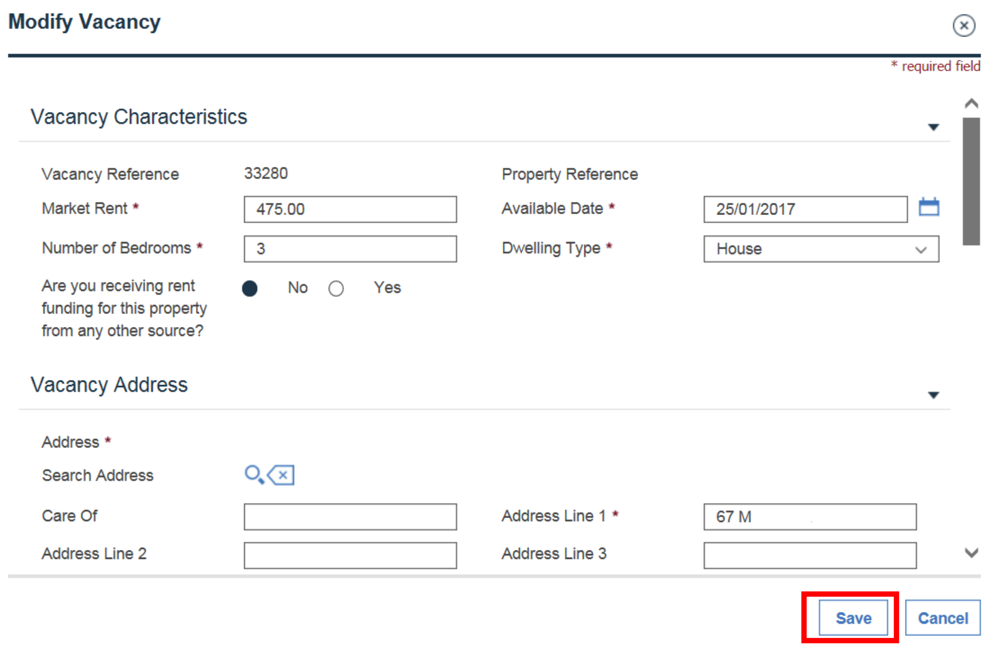
</td></tr>
<tr><td>

Step five

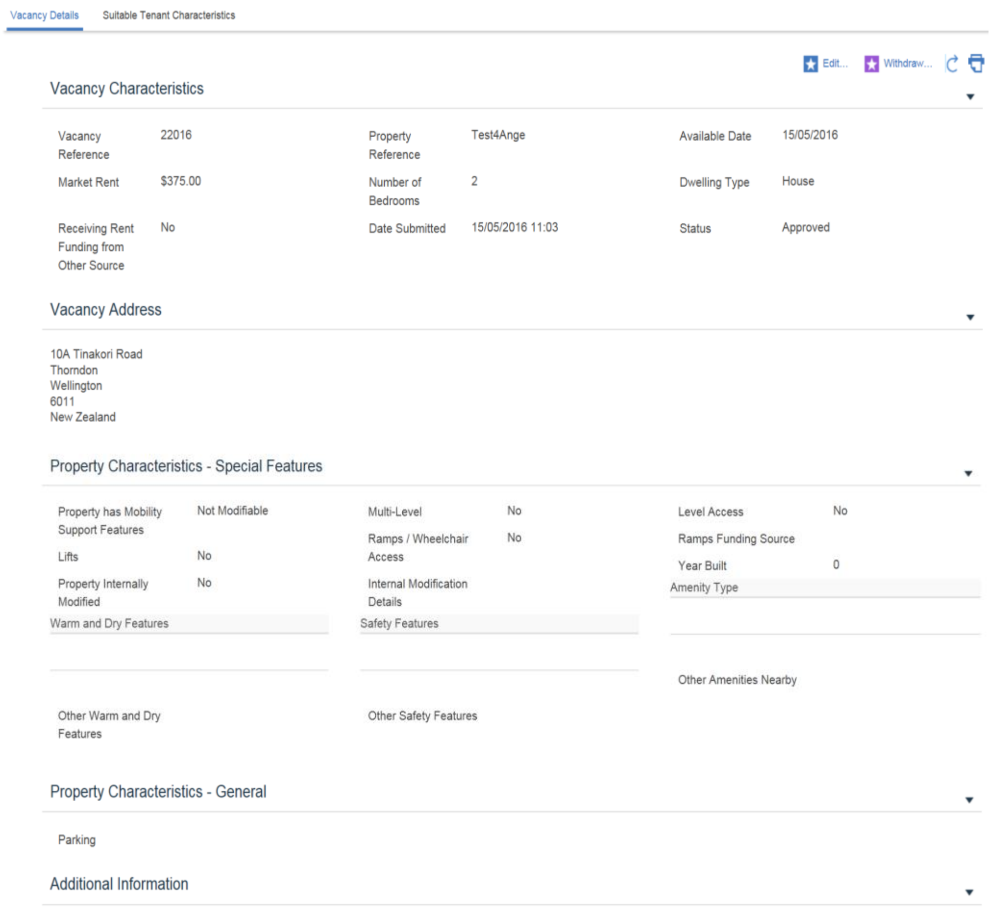
Update the vacancy details then select ‘Save’

Note: If there are any error messages - the ‘Modify Vacancy ' screen redisplays with the error messages at the top of the screen

</td><td>



</td></tr>
</table>

Description	Screenshot
Step six The ‘Vacancy List’ or ‘Vacancy Details’ screen will display • The vacancy status will display as ‘Submitted’ on the 'Vacancy List' screen • If you have an administrator role, you will receive a notification when the approval process is complete – see the Notifications processes • If you log back into BOS, you will see the vacancy status has been updated to ‘Approved’ on the 'Vacancy List' screen • Refresh the shortlist to ensure your vacancies reflect the updated property characteristics	

Withdraw a property vacancy

Prior to withdrawing a vacancy, please make sure you have completed any referrals. If you have an application on the shortlist for this vacancy (that has a status of ‘Provisional Offer Approved’ or ‘Financial Assistance requested’) you MUST withdraw these offers before withdrawing the vacancy. This ensures the client is promptly returned to the register so they can be considered for other vacancies.

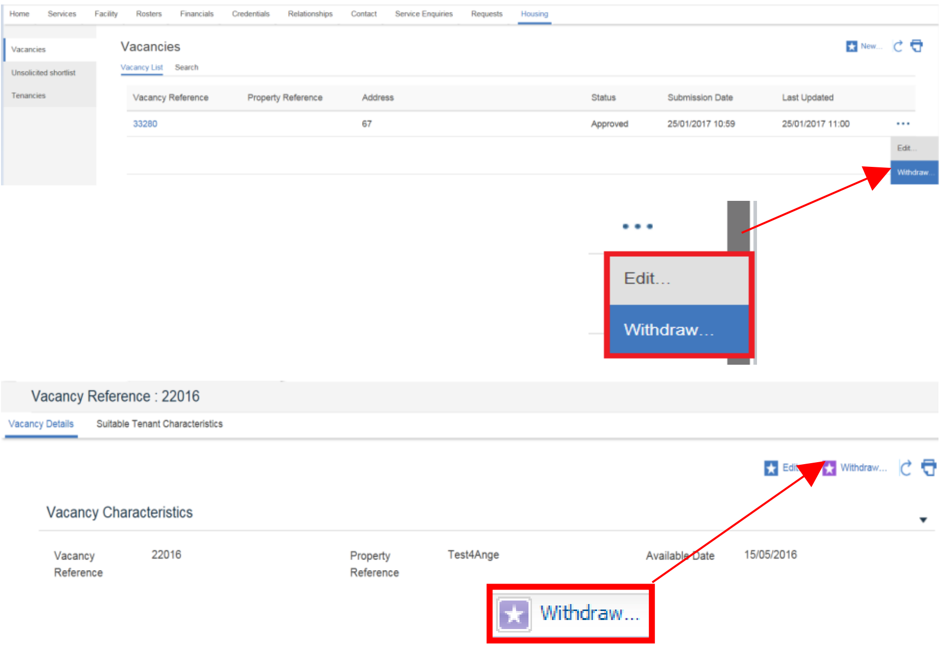
Steps to withdraw a vacancy:

<table>
<tr><th>Description</th><th>Screenshot</th></tr>
<tr><td>

Step one

Locate the vacancy from the ‘Housing’ tab and select ‘Withdraw’ from the action menu on the ‘Vacancy List’ screen or on the ‘Vacancy Details’ screen

</td><td>



</td></tr>
<tr><td>

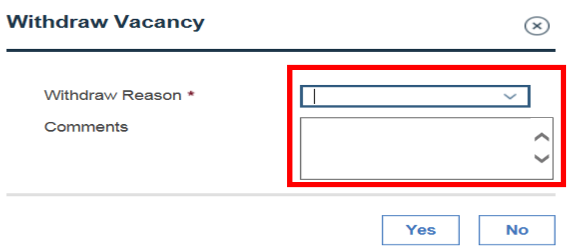
Step two

Select a ‘Withdraw reason’, add any comments then select ‘Yes’

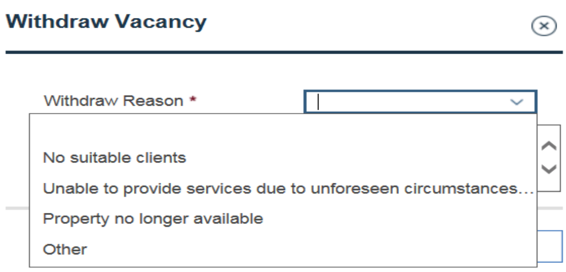
Note: If there are any error messages - the ‘Withdraw Vacancy' screen redisplays with the error messages at the top of the screen. Otherwise, the vacancy status is set to ‘Withdrawn’ and the ‘Vacancy Details’ screen will display

</td><td>

Withdraw



Withdraw Reasons



</td></tr>
</table>

Mark a shortlisted client as unsuitable

For clients that are not suitable or are an inappropriate match (see Appendix C) an ‘Unsuitable’ status can be selected beside the client. You can then refresh the shortlist, all clients with an unsuitable status will be removed from the shortlist and their places will be filled with new clients.

Note: You can subsequently view and restore these ‘Unsuitable’ clients to the shortlist by selecting ‘View clients previously set to Unsuitable’.

To mark as unsuitable:

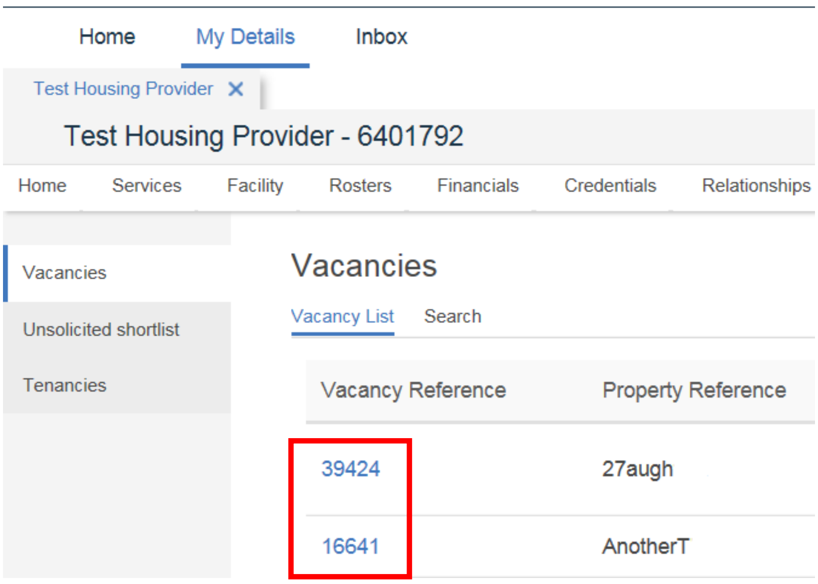
<table>
<tr><th>Description</th><th>Screenshot</th></tr>
<tr><td>

Step one

Navigate to the ‘Vacancies’ menu

Select the ‘Vacancy Reference’ link

</td><td>

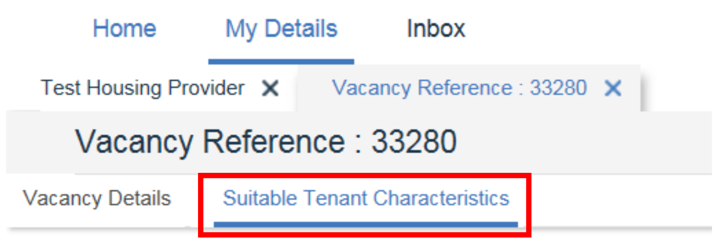


</td></tr>
<tr><td>

Step two

Select the ‘Suitable Tenant Characteristics’ tab

</td><td>

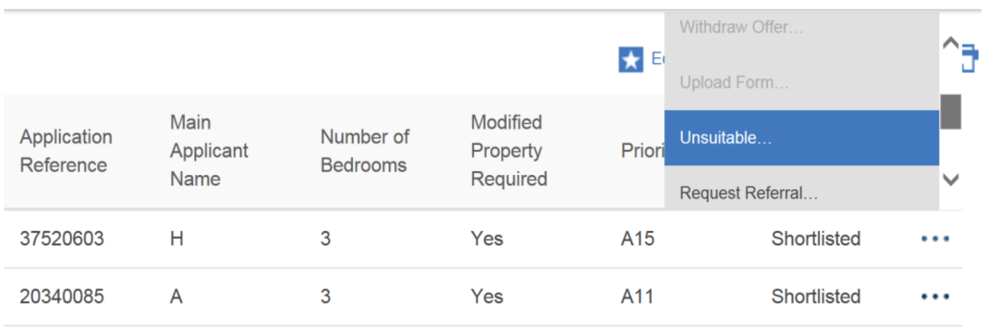


</td></tr>
<tr><td>

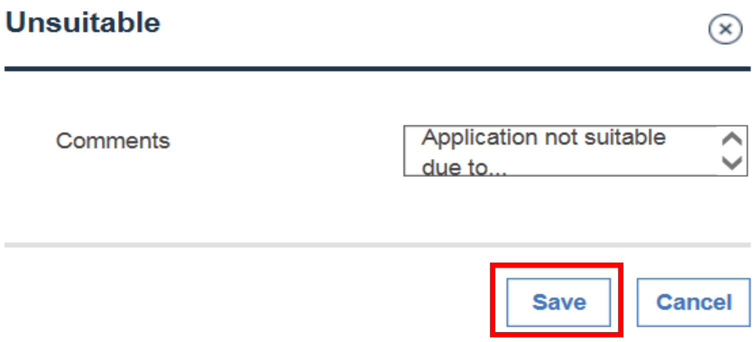
Step three

Select ‘Unsuitable’ from the action menu for an application on the client list

</td><td>

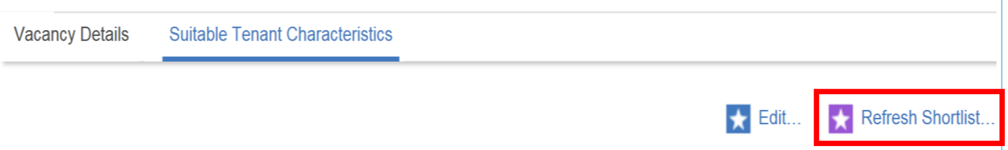
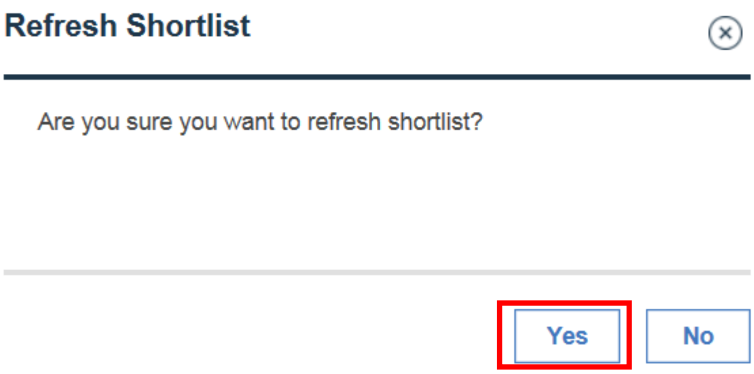


</td></tr>
</table>

<table>
<tr><th>Description</th><th>Screenshot</th></tr>
<tr><td>Step four
Enter comments, if any, then select ‘Save’</td><td>
</td></tr>
<tr><td>Step five
The ‘Unsuitable Application’ screen closes and the details are saved to the database. The ‘Suitable Tenant Characteristics’ screen displays and the referral status is set to ‘Unsuitable’</td><td>
</td></tr>
</table>

Refresh the shortlist for a property vacancy

A shortlist can be refreshed if it has become ‘stale’ (e.g. if the property was submitted for approval well in advance of the availability date).

Description	Screenshot
Step one Navigate to the ‘Suitable Tenant Characteristics’ tab of the vacancy Select ‘Refresh Shortlist’	
Step two Confirm that you want to refresh the shortlist by selecting ‘Yes’	

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<table>
<tr><th>Description</th><th>Screenshot</th></tr>
<tr><td>

Step three

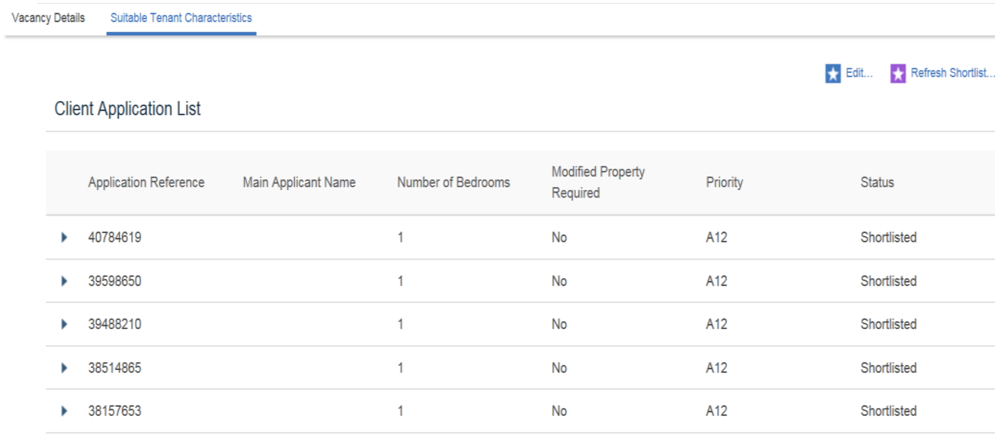
The 'Client Application' list will be refreshed

The identified suitable client list, if there is one, will display under 'Identified Suitable Client'

Note: When you refresh the shortlist, all clients with an unsuitable status will be removed from the shortlist and their places will be filled with new clients

You can subsequently view and restore these 'Unsuitable' clients to the shortlist by selecting 'View clients previously set to Unsuitable'

</td><td>



</td></tr>
</table>

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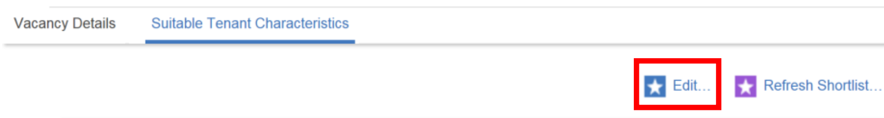
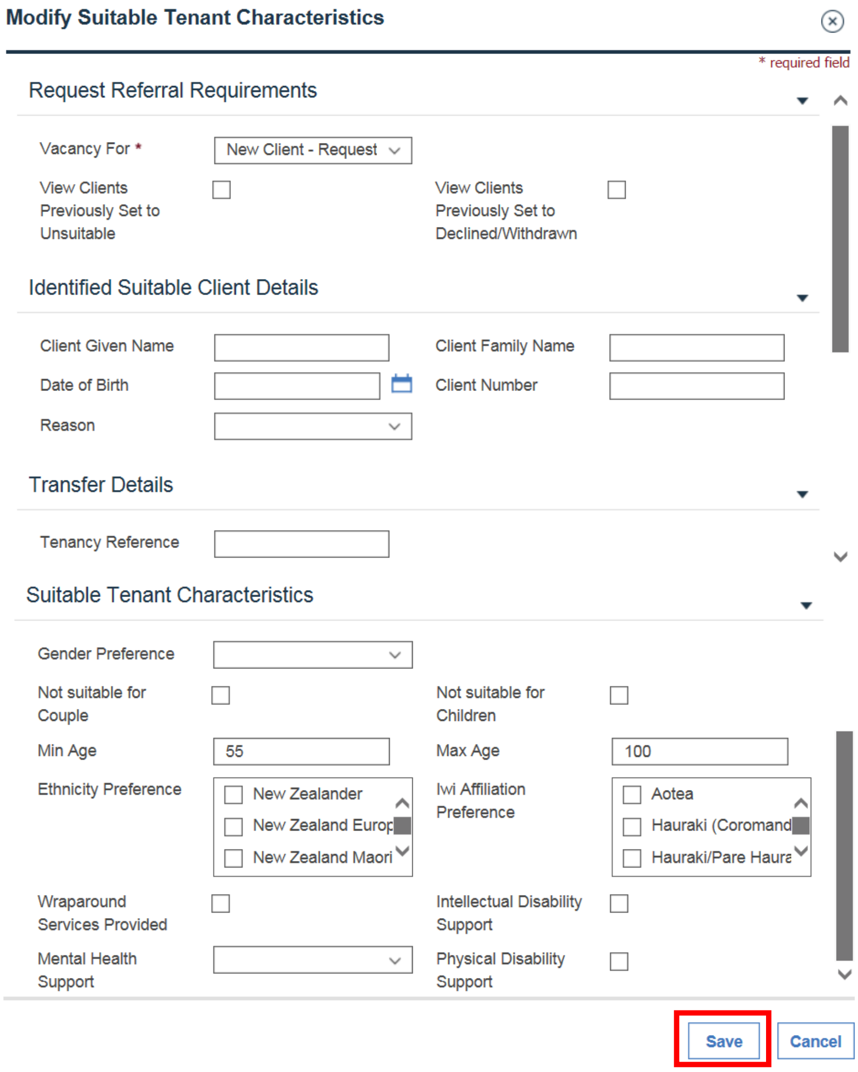
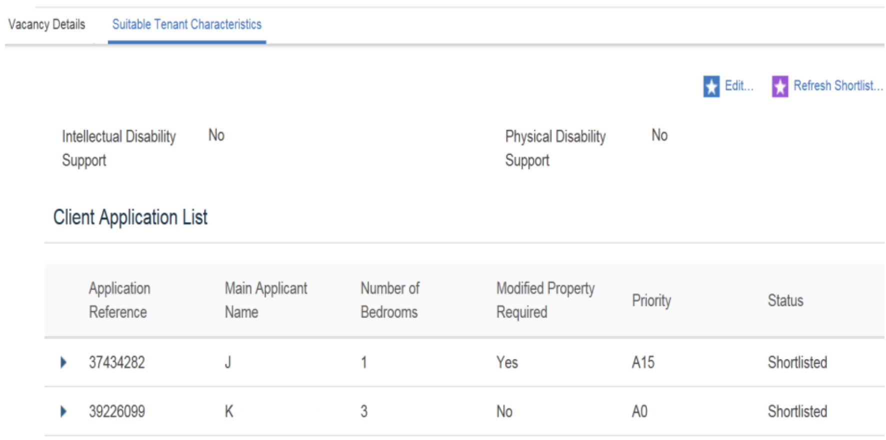
Create a new shortlist for a property vacancy

A new shortlist can be created by changing any of the shortlisting characteristics – see Appendix D for the reasons for declining or withdrawing an offer.

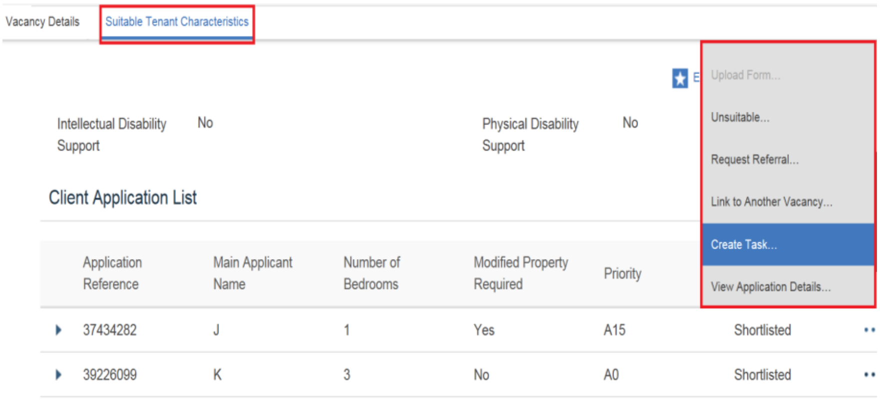
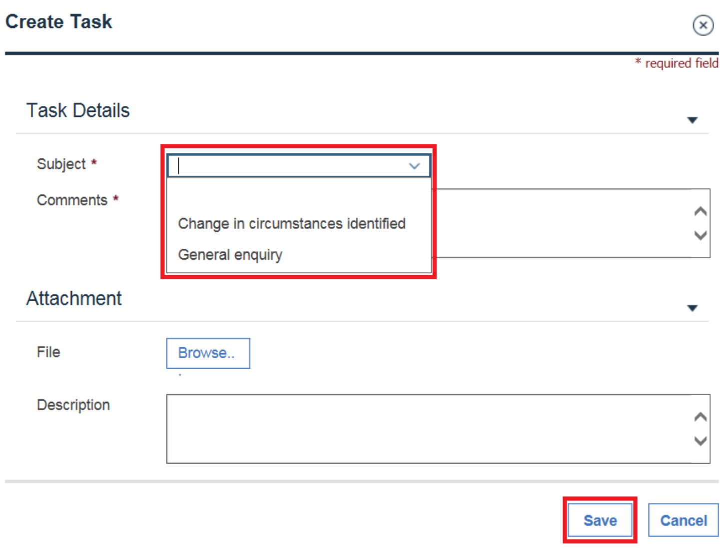
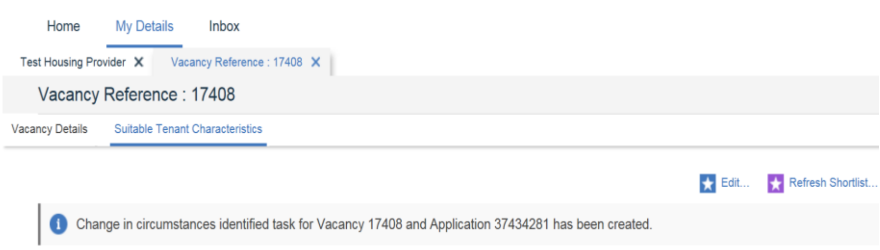
Description	Screenshot
Step one Navigate to the ‘Suitable Tenant Characteristics’ tab of the vacancy Select ‘Edit’	
Step two Update the suitable tenant characteristics then select ‘Save’ • ‘Identified Suitable Client’. If you have a specific client in mind, you can set the vacancy reason to ‘Identified Suitable Client’. You will need to enter either their ‘Client Number’ or their name (‘Client Given Name’ and ‘Client Family Name’) and their ‘Date of Birth’ and a ‘Reason’ (from the drop down list) • If there are any error messages the 'Modify Suitable Tenant Characteristics' screen will redisplay with the error messages at the top of the screen	

Description	Screenshot
Step three The ‘Suitable Tenant Characteristics' screen displays with a new shortlist **Note:** When you create a new shortlist, all clients with an unsuitable status will be removed from the shortlist and their places will be filled with new clients. You can subsequently view and restore these ‘Unsuitable’ clients to the shortlist by selecting ‘View clients previously set to Unsuitable’	

Advise the Ministry that the client has had a change in circumstances

After talking to the clients, you may find that some of their circumstances are not the same as described in the client details. You should advise the client to inform the Ministry of a change in circumstances before you notify the Ministry.

To tell the Ministry about this:

Description	Screenshot
Step one Navigate to the 'Suitable Tenant Characteristics' tab for the vacancy Select 'Create Task' from the action menu for the application on the client list	
Step two Select 'Change in Circumstances Identified' as the subject Enter comments, attach a file as supporting information if required and select 'Save'	
The following message will display when this is completed	

Advise the Ministry that you have decided not to offer the property to the client

After talking to the clients, you may decide that you do not want to offer the property to them.

To tell the Ministry about this:

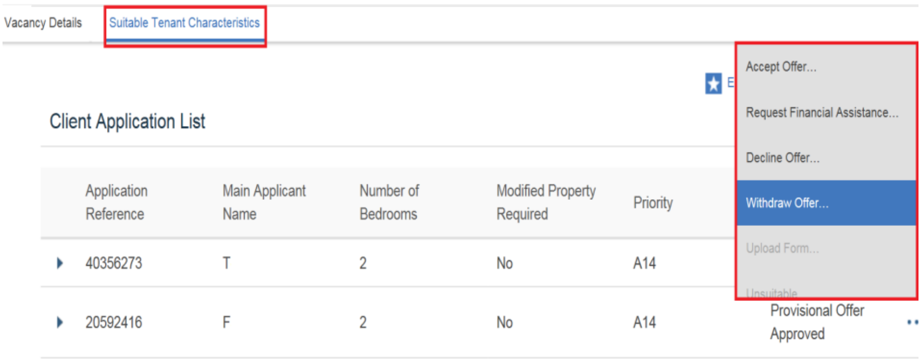
<table>
<tr><th>Description</th><th>Screenshot</th></tr>
<tr><td>

Step one

Navigate to the ‘Suitable Tenant Characteristics’ tab for the vacancy

Select ‘Withdraw Offer’ from the action menu for the application on the client list

</td><td>



</td></tr>
<tr><td>

Step two

Select the reason from the drop-down box, enter comments if any, and select ‘Yes’

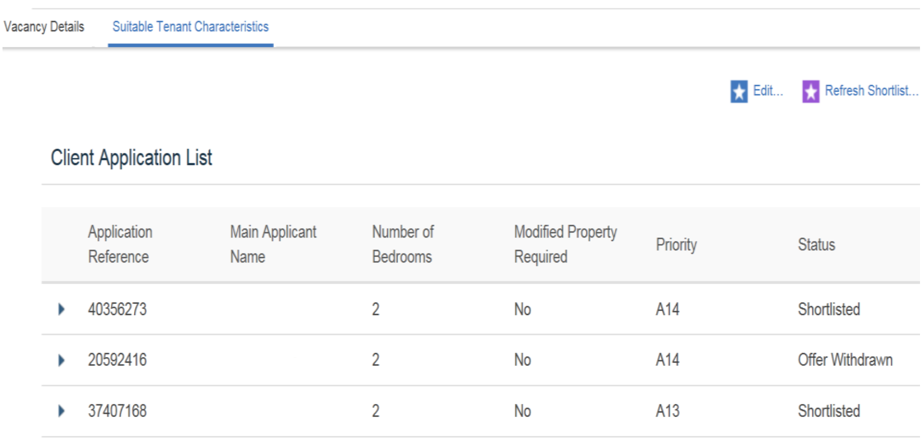
</td><td>

</td></tr>
<tr><td>

The ‘Withdraw Referral Offer’ screen will close and the details will be saved

Note: If there are any error messages - the ‘Withdraw Referral Offer’ screen redisplays with the error messages at the top of the screen. Otherwise the ‘Suitable Tenant Characteristics’ screen displays and the referral status is set to ‘Offer Withdrawn’

</td><td>



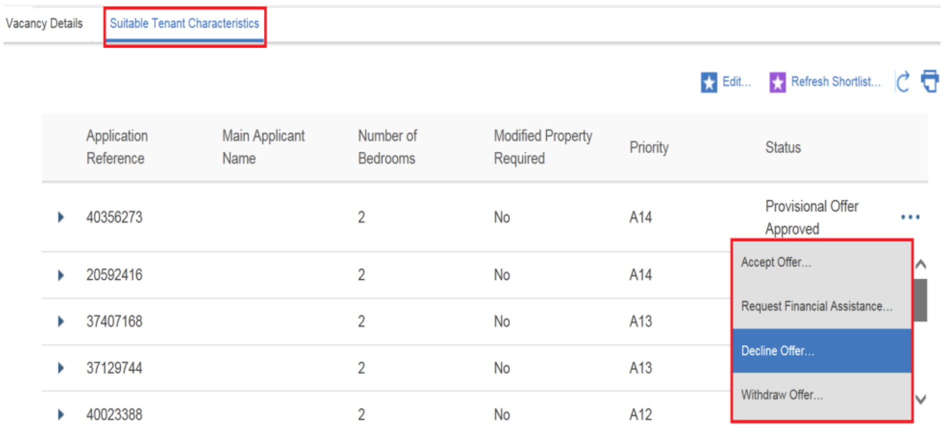
</td></tr>
</table>

Advise the Ministry that client has declined a property offer

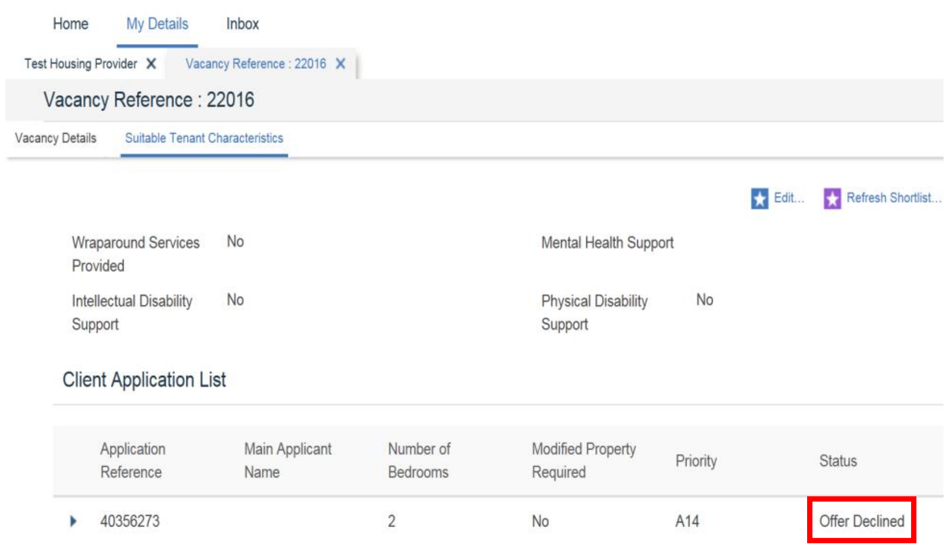
If you offer the property vacancy to the clients, but they decline the offer, you need to tell the Ministry about this.

Clients on the register can only decline a suitable property if they have a good and sufficient reason. The Ministry determines if reason for decline is good and sufficient.

If they decline a suitable social housing property without a good and sufficient reason they are removed from the social housing register for 13 weeks. If they reapply, their decision to decline is considered as part of the new assessment:

Description	Screenshot
Step one Navigate to the 'Suitable Tenant Characteristics' tab for the vacancy Select 'Decline Offer' from the action menu for the application on the client list	
Step two Select the reason from the drop-down box, enter comments in the space provided, and select 'Yes' (Refer to Appendix D for the complete list of Decline reasons)	

<table>
<tr><th>Description</th><th>Screenshot</th></tr>
<tr><td>The ‘Decline Referral Offer’ screen closes and the details will be saved

Note: If there are any error messages – the ‘Decline Referral Offer' screen redisplays with the error messages at the top of the screen. Otherwise the ‘Suitable Tenant Characteristics’ screen displays and the referral status is set to ‘Offer Declined’</td><td>
</td></tr>
</table>

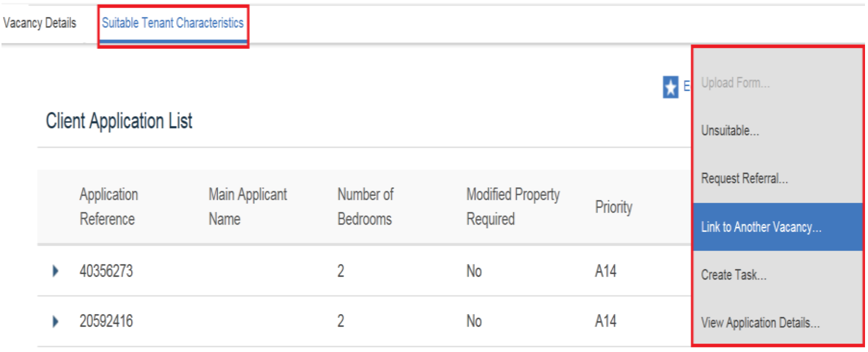
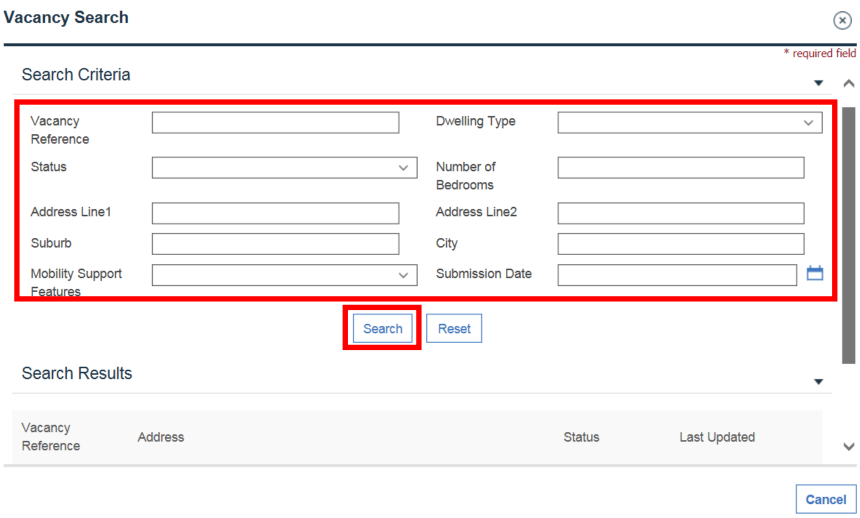
MINISTRY OF SOCIAL DEVELOPMENT
TE MANATŪ WHAKAHIATO ORA

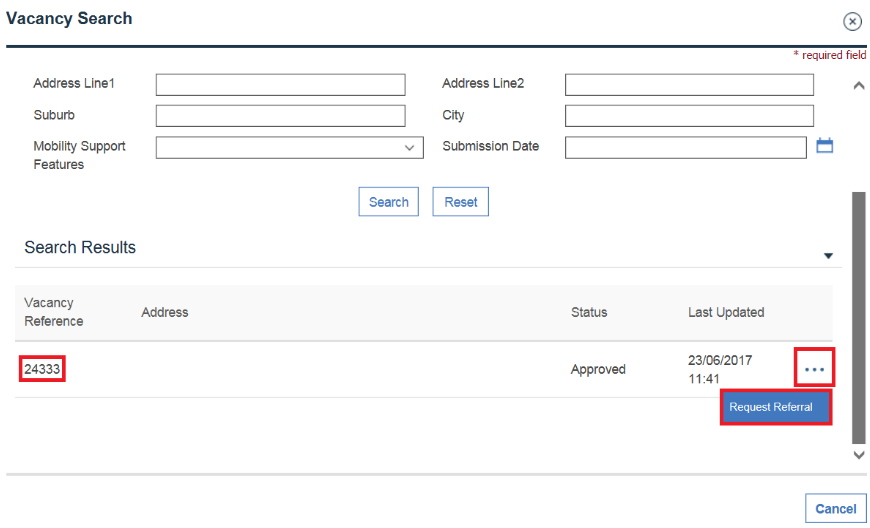
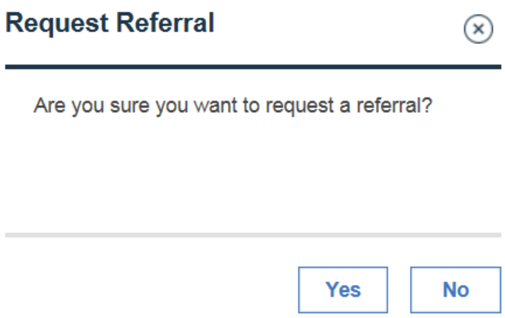
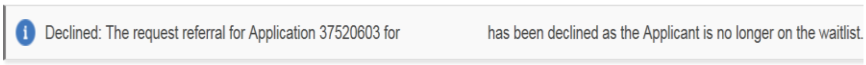
Link a shortlisted application to a different property vacancy

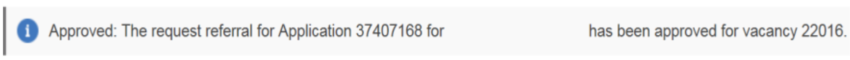
You have the option to link a shortlisted client from one vacancy to another of your vacancies – providing the client hasn't already been shortlisted for the other vacancy or is an identified suitable client. To do this, the user selects 'Link to Another Vacancy' from the action menu on the right hand side of the Client Application List on the Suitable Tenant Characteristics screen.

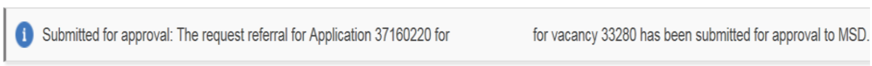
(This functionality is also used on the 'Unsolicited Shortlist' screen, when the user selects 'Refer to Vacancy').

The sequence of events for linking a referral to another vacancy is:

Description	Screenshot
Step one Navigate to the 'Suitable Tenant Characteristics' tab for the vacancy Select 'Link to Another Vacancy'	
Step two In the 'Vacancy Search' screen enter your search criteria and select 'Search'	

<table>
<tr><th>Description</th><th>Screenshot</th></tr>
<tr><td>Step three
Select ‘Request Referral’ from the action menu of the vacancy you want to match the client to</td><td>
</td></tr>
<tr><td>Step four
When the ‘Request Referral’ confirmation screen displays select ‘Yes’</td><td>
</td></tr>
<tr><td>The ‘Vacancy Details’ screen for the linked vacancy will display a message with the outcome</td><td>Declined


Approved


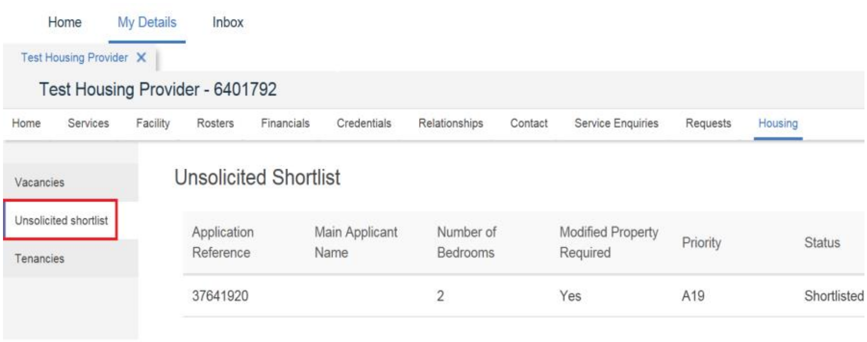
Pending Approval

</td></tr>
</table>

Viewing an unsolicited shortlist

There are some situations where the Ministry needs to manually advise you of a client with a specific or urgent housing need. This is called an unsolicited shortlist.

You will receive a notification both by email and in the system to advise you that there is an unsolicited shortlist waiting for you to review.

To view the unsolicited shortlist:

Description	Screenshot
Step one Navigate to the ‘Housing’ tab and select ‘Unsolicited Shortlist’ from the menu on the left	

Request the referral of an application on an unsolicited shortlist

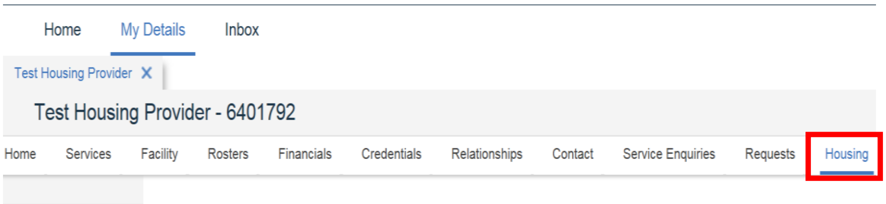
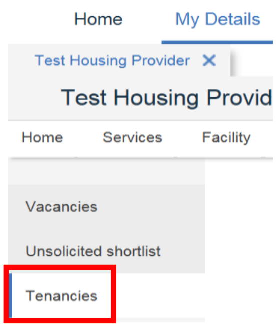
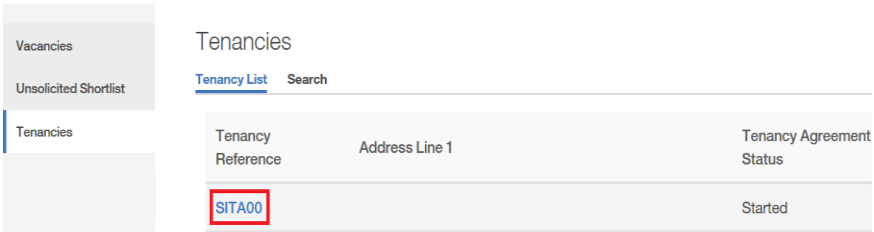
The Link to Another Vacancy screen displays when you select ‘Refer to Vacancy’ on the ‘Unsolicited Shortlist’ screen. Follow the ‘Link a shortlisted application to a different property vacancy’ pathway to request a referral for an application on an unsolicited shortlist.

MINISTRY OF SOCIAL DEVELOPMENT
TE MANATŪ WHAKAHIATO ORA

Part 3: Tenancy Management

Advise the Ministry that a tenancy agreement has been cancelled

If the tenancy does not start, for whatever reason, you need to advise the Ministry about this:

Description	Screenshot
Step one Log into BOS and select 'My Details' Select the 'Housing' tab Navigate to the 'Tenancies' tab	 
Step two Locate the tenancy from the tenancy list	

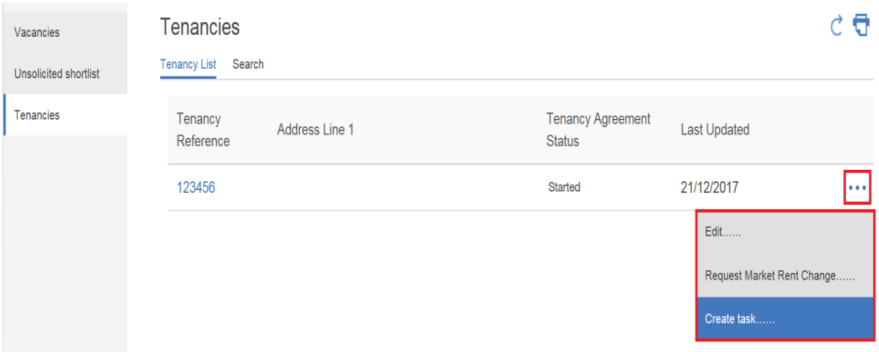
<table>
<tr><th>Description</th><th>Screenshot</th></tr>
<tr><td>

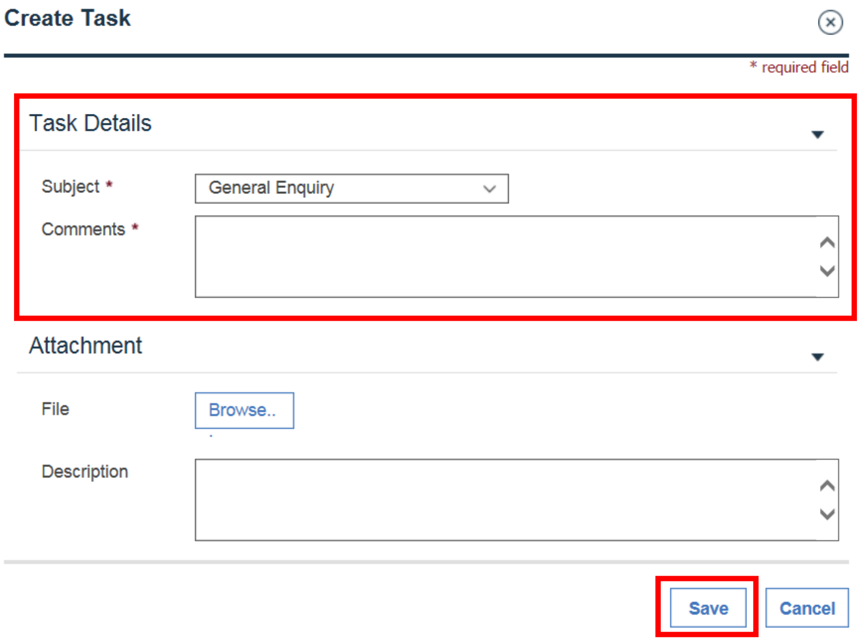
Step three

Select ‘Create task’ from the action menu for the tenancy

Set the subject to ‘General Enquiry’, enter the details in the Comments field and select ‘Save’

</td><td>





</td></tr>
<tr><td colspan="2">

Note: To get another shortlist for the property, you will need to re-submit the property as a new vacancy.

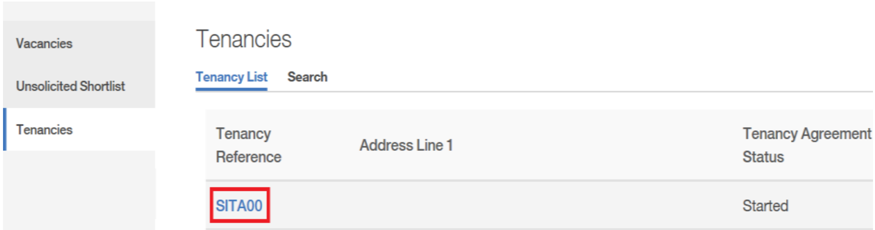
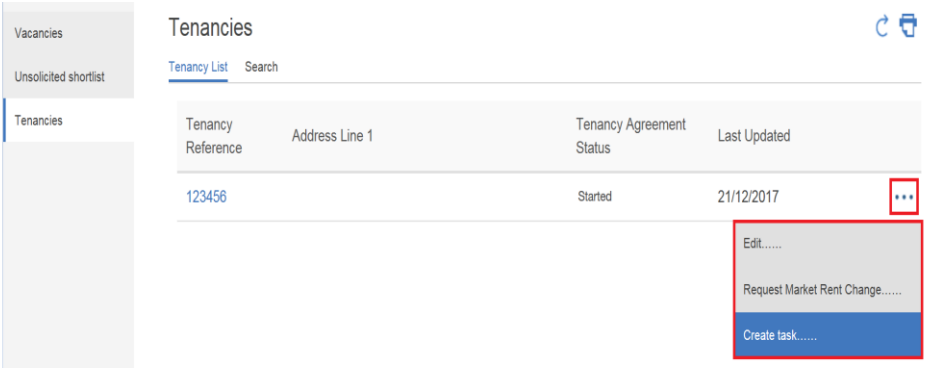
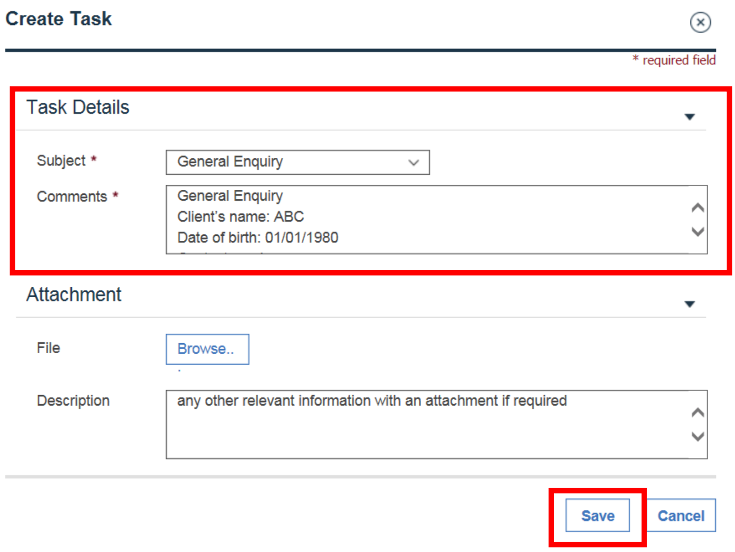
</td></tr>
</table>

Advise the Ministry of a change to the rent redirection details or tenancy start date

If you need to make any changes to the rent redirection payment reference, rent charge date, rent redirection start date or tenancy start date for any reason, you will need to create a task under ‘General Enquiry’ for the Ministry to process.

You can also use this process to set up rent/rent arrears redirection.

Note: You cannot use client’s nine-digit client number as redirection payment reference.

Description	Screenshot
Step one Navigate to the tenancy by selecting the ‘Tenancy Reference’ link from the tenancies list	
Step two Select ‘Create task’ from the action menu for the tenancy Set the subject to ‘General Enquiry’	

MINISTRY OF SOCIAL DEVELOPMENT
TE MANATŪ WHAKAHIATO ORA

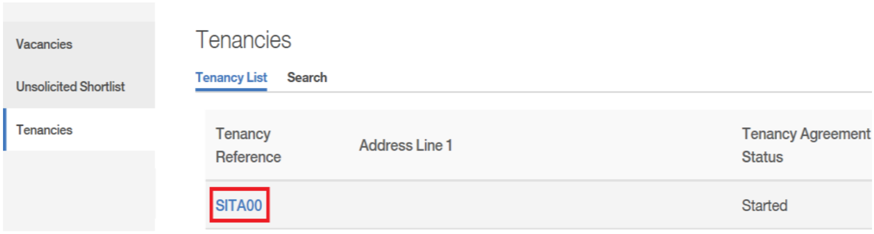
Advise the Ministry of an additional redirection for rent arrears or damages

<table>
<tr><th>Description</th><th>Screenshot</th></tr>
<tr><td>

Step one

Navigate to the tenancy by selecting the ‘Tenancy Reference’ link from the tenancies list

</td><td>



</td></tr>
<tr><td>

Step two

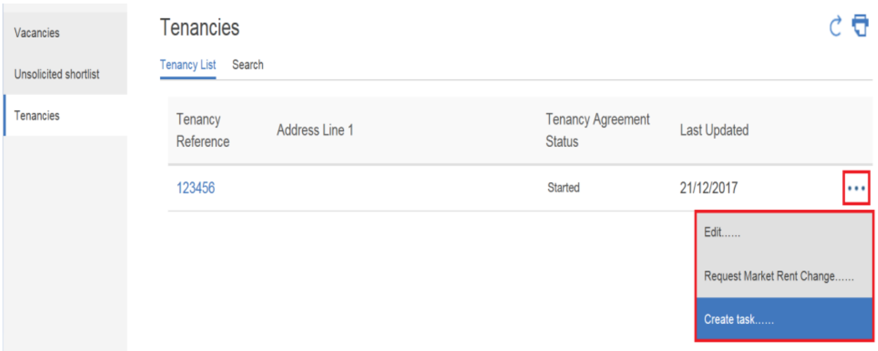
Select ‘Create task’ from the action menu for the tenancy

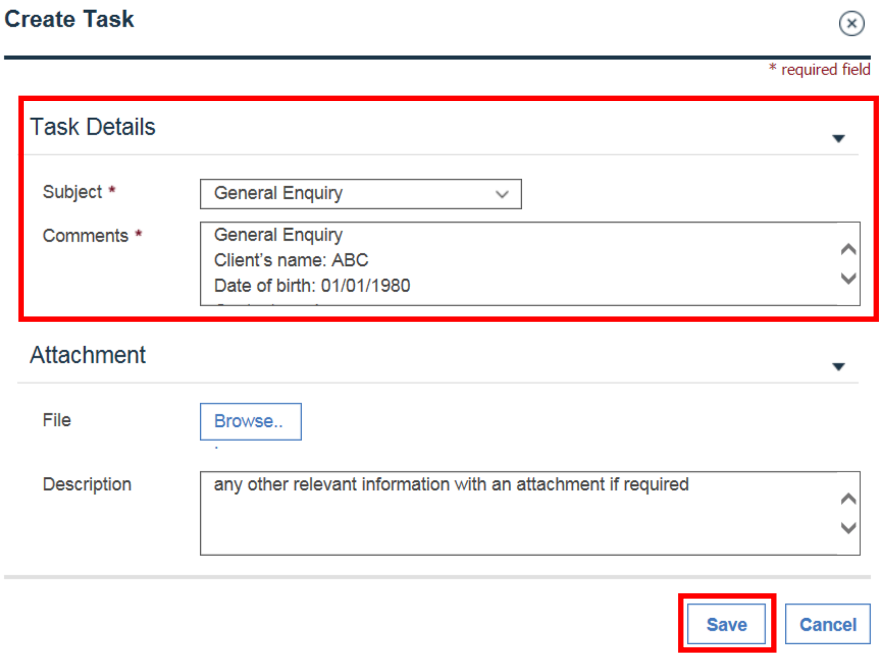
Set the subject to ‘General Enquiry’

Please attach a completed redirection form signed by the tenant(s) for the costs of damages and water consumption, however the form is not required for rent arrears

Refer to ‘Redirection for on-going rent payments’ and ‘Redirection for the payment of rent arrears’ in Community Housing Provider Operational Guidelines for more information

</td><td>



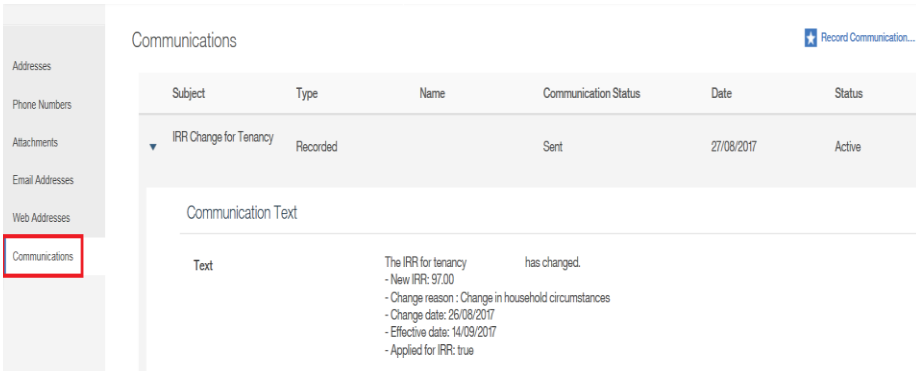


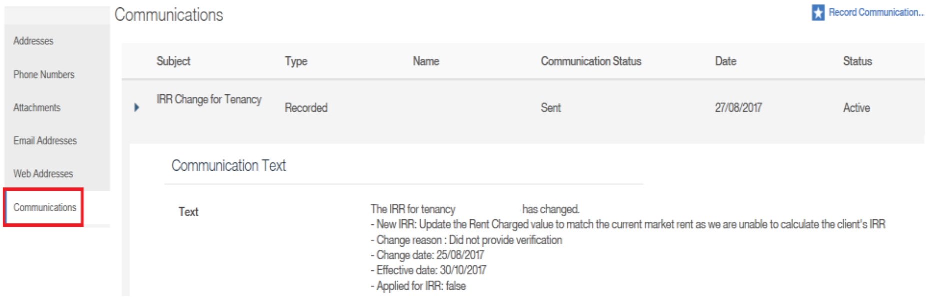
</td></tr>
</table>

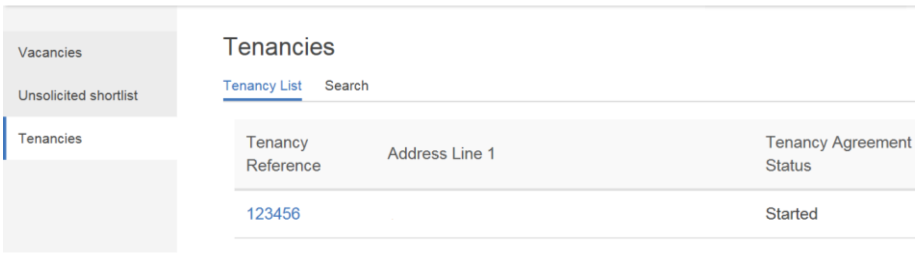
Advise the Ministry of a change to the rent amount

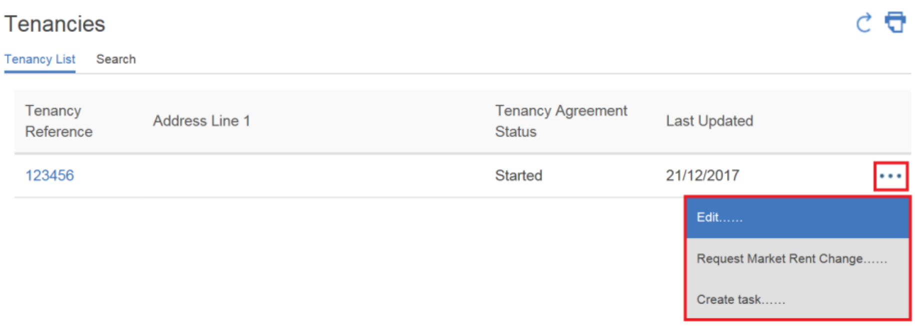
If you receive a notification from the Ministry regarding a change to the household's rate of IRR, you will need to follow the process outlined below. This is also the process to change the current rent amount to market rent.

Note: Decreases to IRR should be actioned immediately. Increases to IRR must be processed **seven days** prior to the effective date of change.

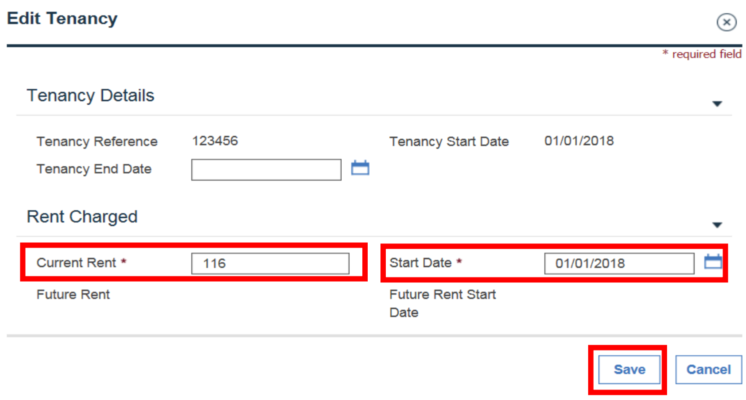
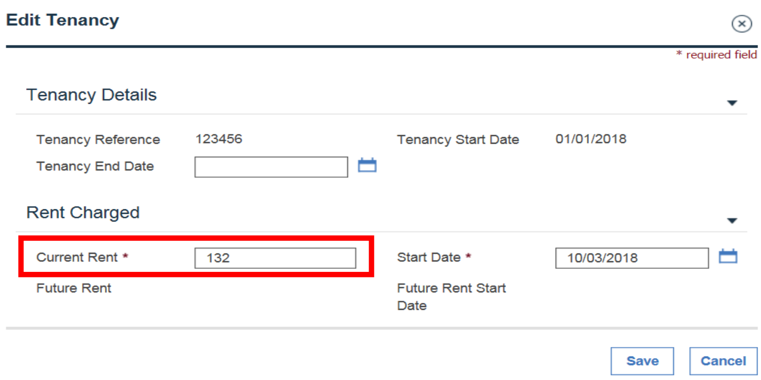
Description	Screenshot
This is what the notification looks like **New IRR**: xx.xx (new calculated IRR for the tenancy) **Change reasons**: xxx (reason chosen for review of IRR i.e. annual review or change in household circumstances) **Change date**: xx/xx/xx (date on which the new IRR has been calculated in MSD system) **Effective date**: xx/xx/xx (date on which the new IRR is effective, inclusive of the mandatory notification days) **Applied for IRR**: True (client is applying for IRR/IRR is applicable to clients household)	

<table>
<tr><th>Description</th><th>Screenshot</th></tr>
<tr><td></td><td>


If a client does not return their annual review, does not provide verification or their IRR is calculated to a rate that is more than the Market Rent for the property, generally they will pay Market Rent. You will receive a notification that shows Update the Rent Charged value to match the current market rent as we are unable to calculate the client's IRR.
This means that the client should pay Market Rent from the Effective date. You should complete the steps outlined below using the Market Rent amount as the ‘Current Rent’. If you choose not to charge the client the Market Rent amount, you cannot claim the IRR subsidy for the tenancy.
</td></tr>
<tr><td>Step one
Navigate to the tenancy by selecting the ‘Tenancy Reference’ link from the tenancies list</td><td>


</td></tr>
<tr><td>Step two
Select ‘Edit’ from the action menu within the tenancy details</td><td>


</td></tr>
</table>

Description	Screenshot
Step three Overtype the pre-filled 'Current Rent' amount and 'Start Date' with the new rent amount and the date that the rent changed and select 'Save'	
If the notification for IRR is more than the market rent, add the market rent to the Current Rent field.	

Note: Where an IRR amount has decreased and the effective date in the notification is showing a past date, decrease the IRR immediately or from the next rent charge date and update the rent change following the process above.

Where an IRR amount has increased and the effective date in the notification is showing:

- a past date; or
- a date less than 19 calendar days for change reason 'Change in household circumstances'; or
- less than 60 calendar days for change reason 'Annual Review',

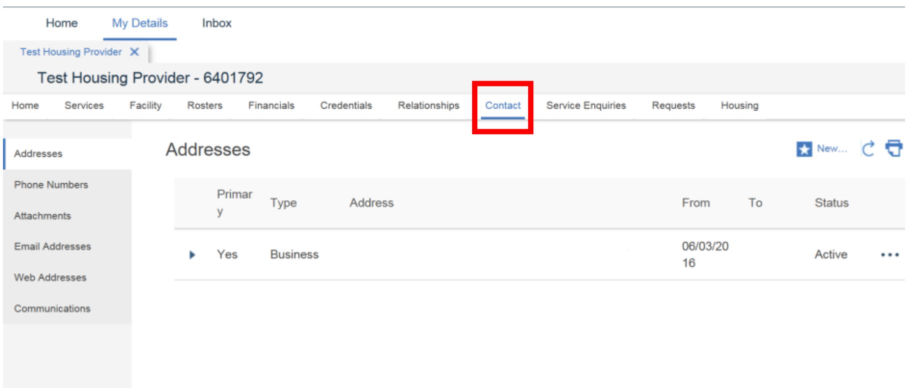
email GNL_Provider_Support@msd.govt.nz using the 'Lack of Notice Period' email template in Appendix B to receive a new notification.

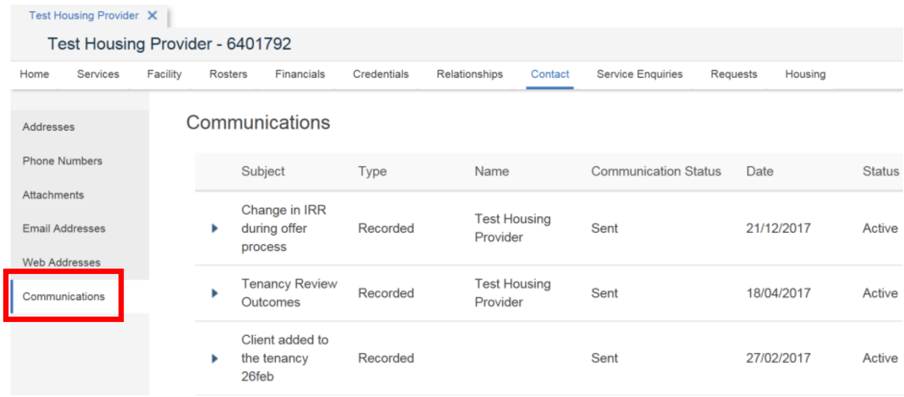
MINISTRY OF SOCIAL DEVELOPMENT
TE MANATŪ WHAKAHIATO ORA

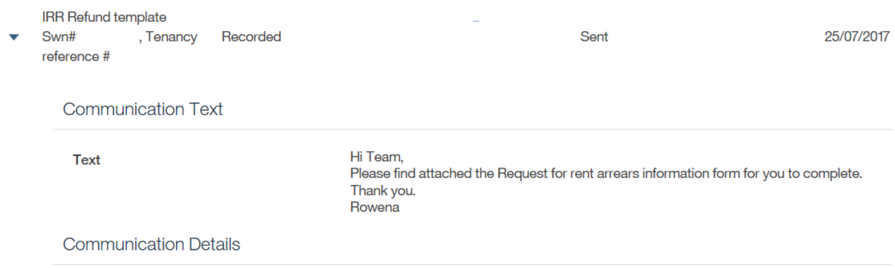
View details of a request for information about rent arrears

The Ministry may assess an IRR overpayment and, before paying the refund to the tenant, may ask you if the tenant is in rental arrears. If you have an administrator role you will get a notification in your inbox. If not, you can see details of the request by:

<table>
<tr><th>Description</th><th>Screenshot</th></tr>
<tr><td>Step one

Log in to Business Online Services and navigate to the ‘Contact’ tab from within ‘My Details’</td><td>
</td></tr>
<tr><td>Step two

Select the ‘Communications’ tab</td><td>
</td></tr>
<tr><td>Step three

Search through the list to find the relevant ‘Rent Arrears request’ and expand to view details and select File Name</td><td>
</td></tr>
<tr><td colspan="2">Step four

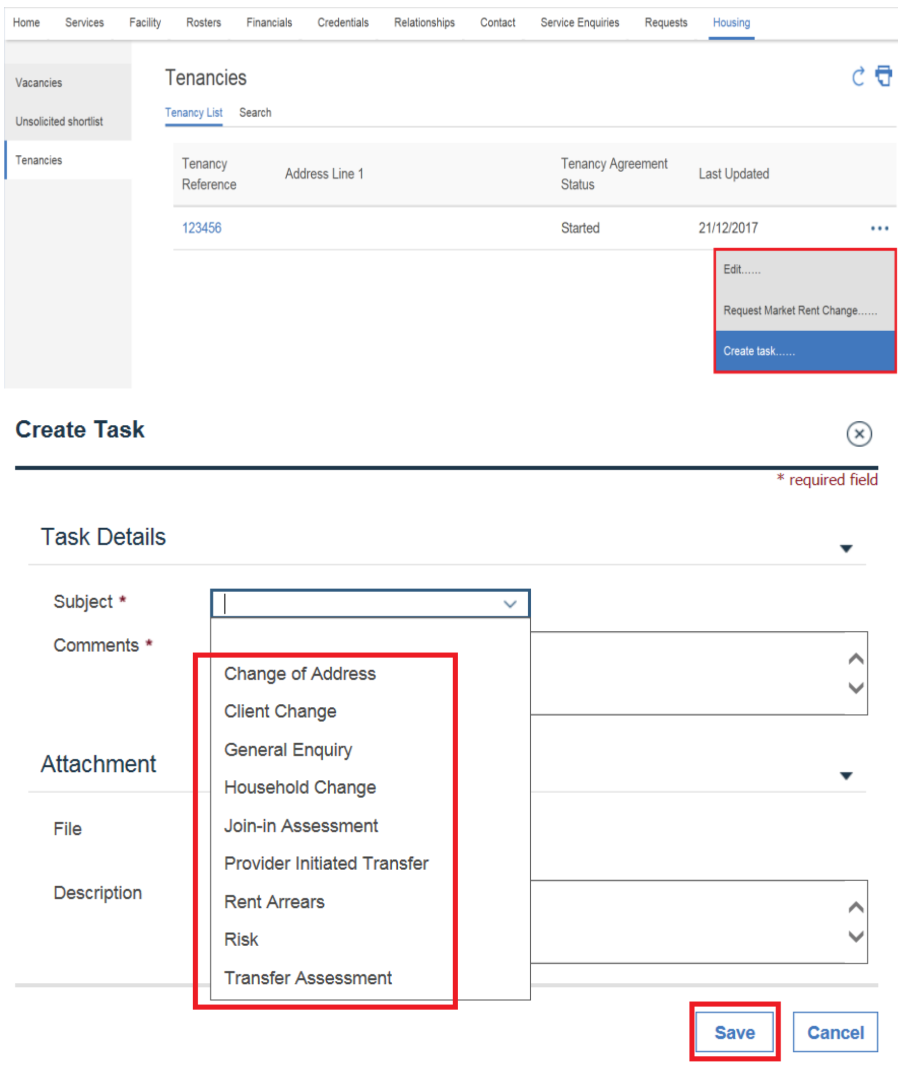
Check the tenant’s rent account to see if there are any rent arrears owing for the specified refund period.

Note: This information will be found within your own records, separate from BOS.

Complete the ‘Request for rent arrears information form’ and advise the Ministry about the amount of rent arrears owed. If there are no rent arrears for the specified refund period, write ‘No arrears’.</td></tr>
</table>

Advise the Ministry about the amount of rent arrears owed

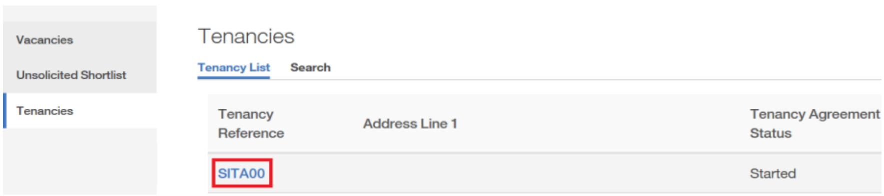
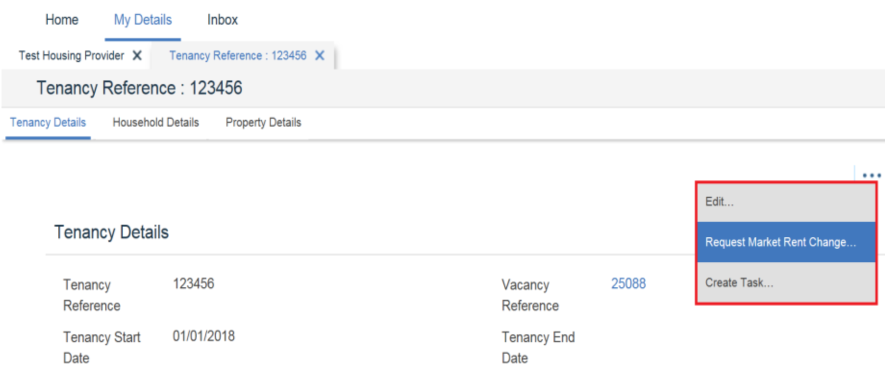
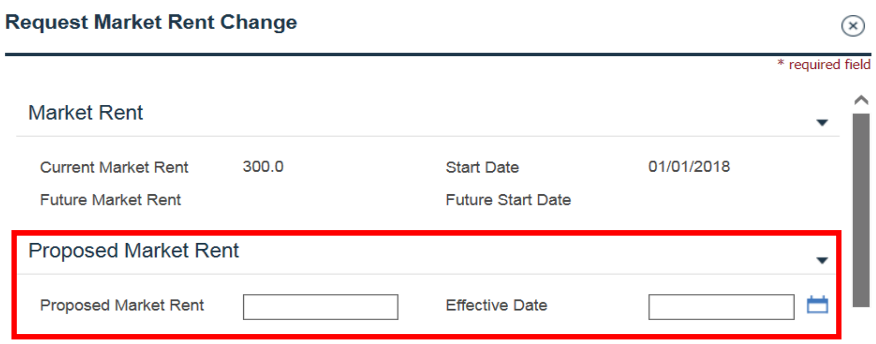
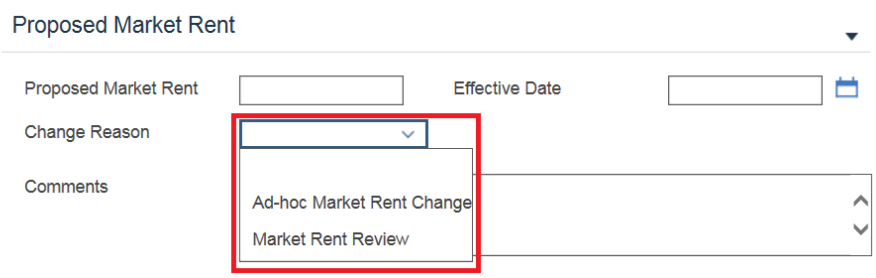
To respond to the Ministry's request regarding rent arrears:

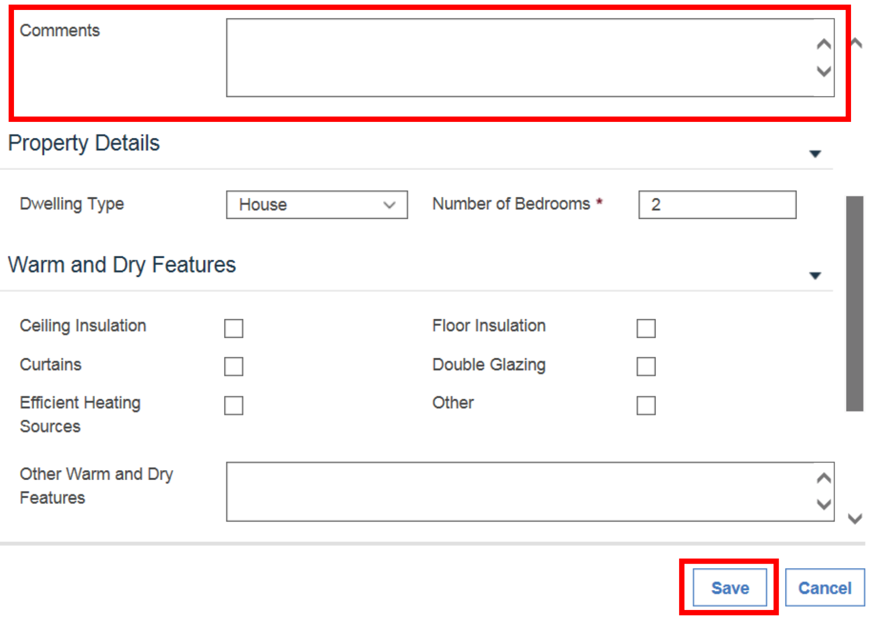
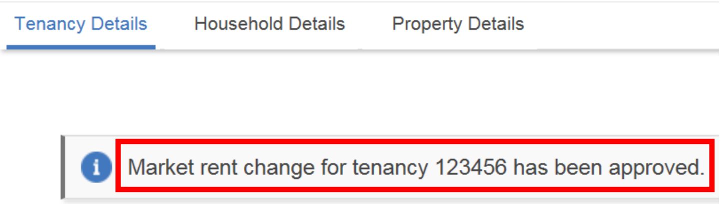
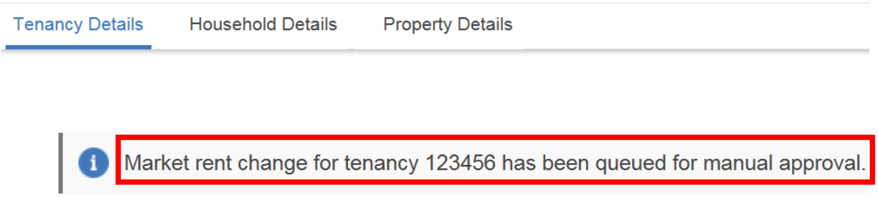
Description	Screenshot
Step one Navigate to the tenancy by selecting the 'Tenancy Reference' link from the tenancies list Select 'Create task' from the action menu for the tenancy Set the subject to 'Rent Arrears' Upload the completed 'Request for rent arrears information form' and select 'Save'	

Note: The Ministry cannot process a refund for the client until you have responded to the request for rent arrears information. Please check with your Administrator as they will also receive a notification.

Notify the Ministry of a scheduled or ad-hoc market rent change

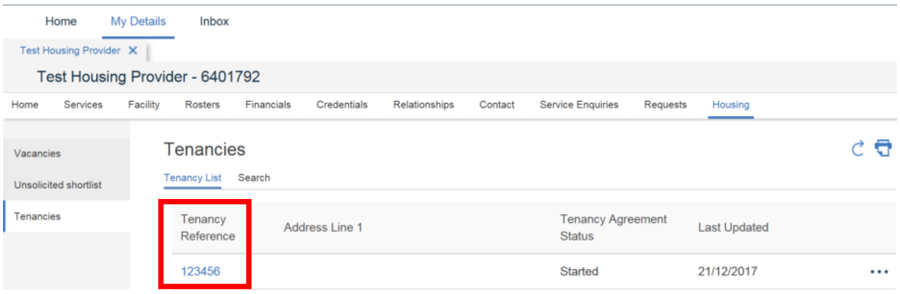
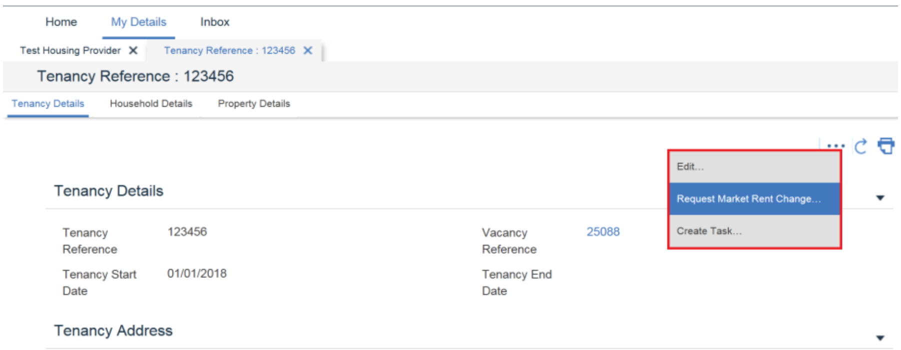
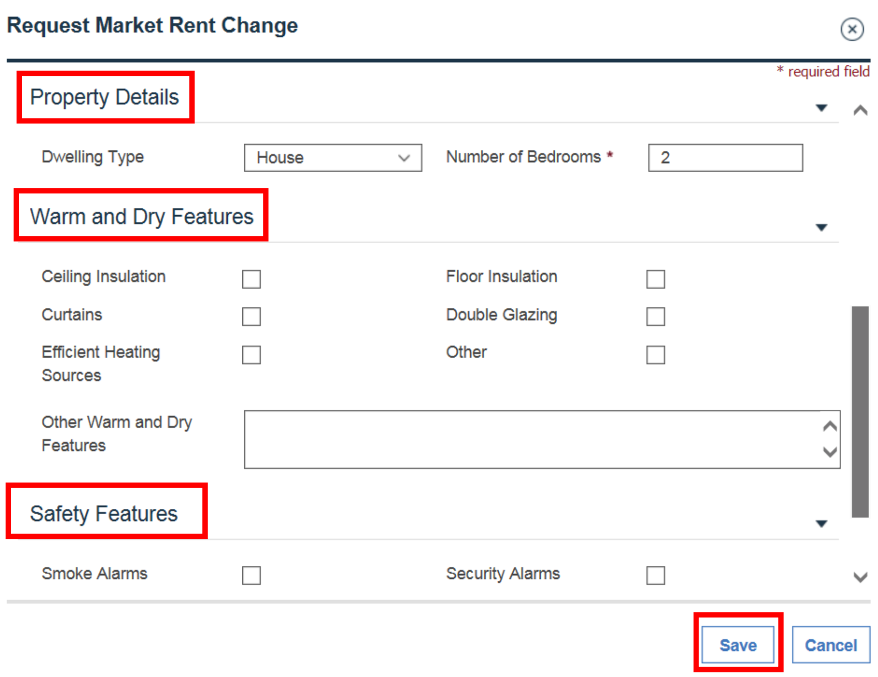
When you have reviewed the market rent for a property and want to request a change, you can request it:

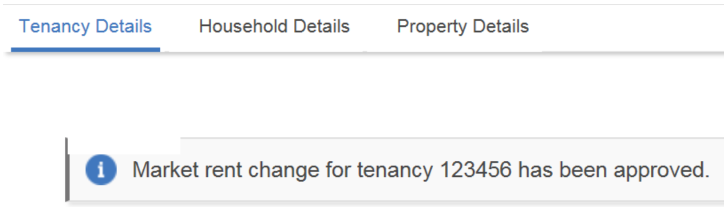
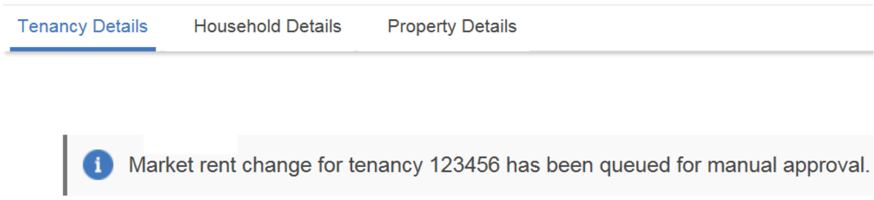
Description	Screenshot
Step one Navigate to the tenancy by selecting the 'Tenancy Reference' link from the tenancies list	
Step two Select 'Request Market Rent Change'	
Step three Check the current market rent details and then type in your proposed new market rent along with the date you want it to be effective from	
Step four Select 'Market Rent Review' as the change reason from the drop-down box If you want to change the market rent outside of the 'set frequency' timeframes, then you need to select 'Ad-hoc Market Rent Change' as the change reason	

Description	Screenshot
Step five Enter any supporting comments This is also a good time to check the 'Warm and Dry Features' and 'Safety Features' for your property are correct and update these, if appropriate Select 'Save'	
Note: If the market rent change is approved automatically you will see the new market rent displayed on the tenancy details tab • If it is not approved automatically you will need to wait for approval from the Ministry • If you have an administrator role, you will receive a notification when the process is complete – see the Notifications processes	You will receive an on screen notification – Market rent change automatically approved  Market rent change can't be automatically approved 

Advise the Ministry about a change to a tenanted property

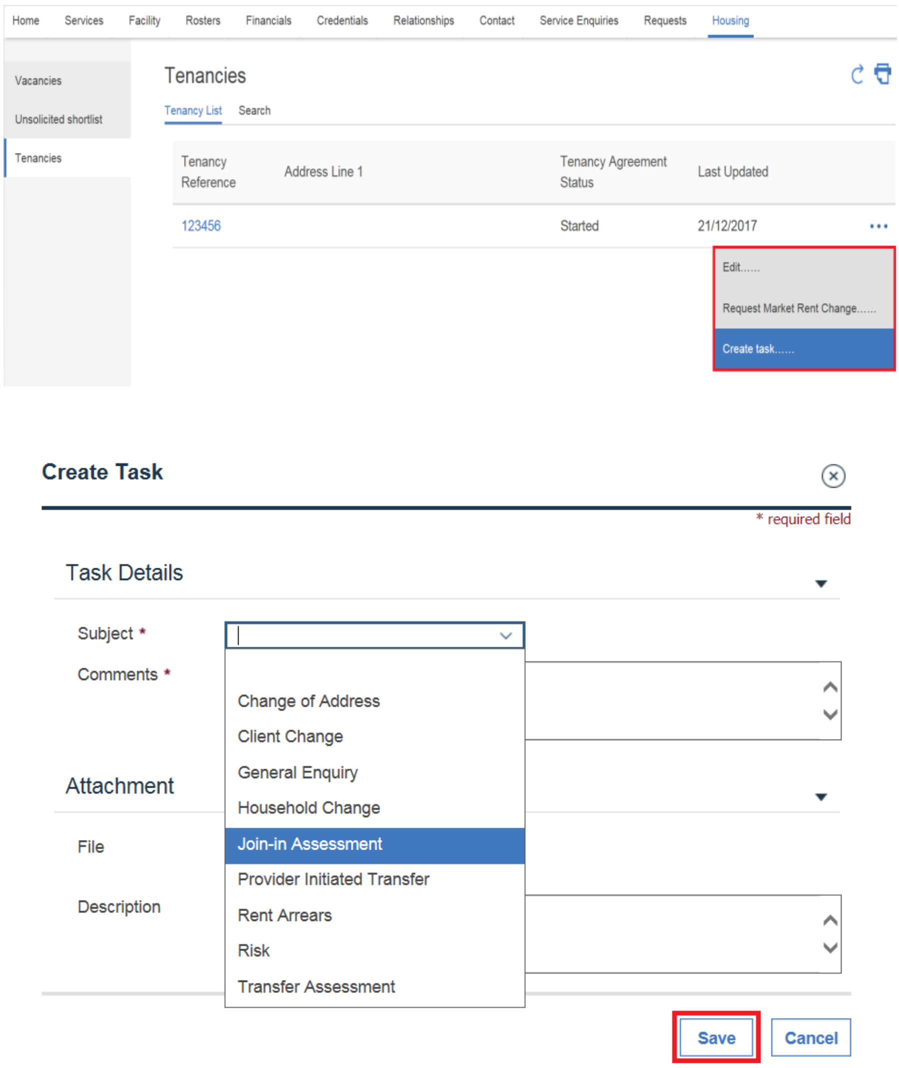
If there has been a change to the Warm and Dry features or Safety features or number of bedrooms, you must advise the Ministry by updating BOS:

Description	Screenshot
Step one Navigate to the tenancy by selecting the 'Tenancy Reference' link from the tenancies list	
Step two Select 'Request Market Rent Change'	
Step three When the screen displays, update the 'Property Details', 'Warm and Dry Features' and / or 'Safety Features' Select 'Save'	

Description	Screenshot
Note: The market rent will be re-submitted for approval, based on the updated property details • If it is re-approved automatically you will see the new market rent displayed on the tenancy details tab • If it is not approved automatically you will need to wait for this to be approved manually by the Ministry	You will receive an on screen notification **Market rent change automatically approved**  **Market rent change can't be automatically approved.** 

Request an assessment for a person who wants to join-in on an existing tenancy

If a person wants to be added as a tenant to the tenancy agreement, and you are happy to do this, then you need to ask the Ministry to confirm that the person is eligible for social housing before they can be added as a tenant. A diagram for the process for join-in tenancy (prospective tenant is not a partner) is available in Appendix F.

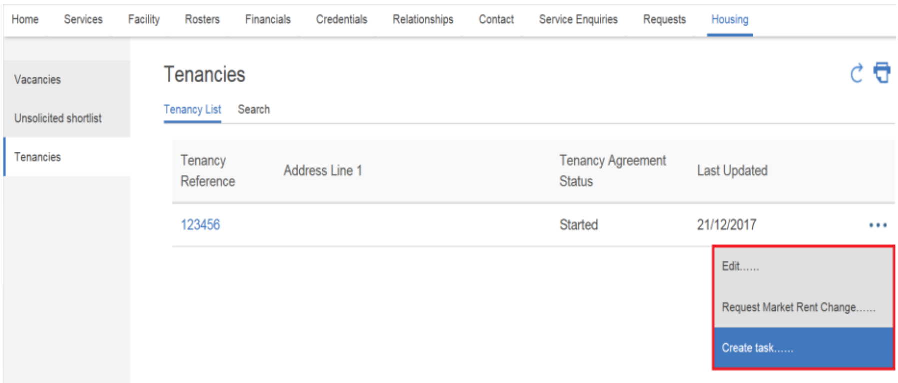
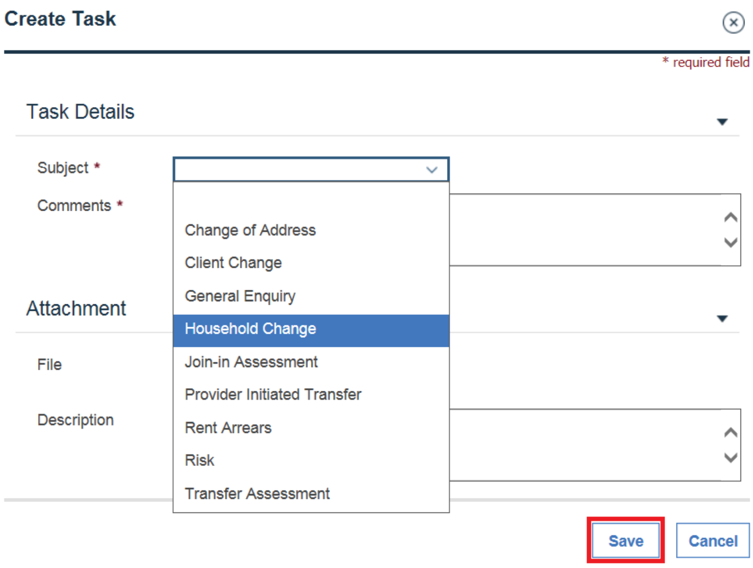
Description	Screenshot
Step one Navigate to the tenancy by selecting the 'Tenancy Reference' link from the tenancies list and select 'Create task' from the action menu for the tenancy Choose 'Join-in Assessment' as the subject Please refer to Appendix B for templates of information to include and select 'Save' **Note:** If you have an administrator role, you will receive a notification when the assessment is complete – see the Notifications processes	

MINISTRY OF SOCIAL DEVELOPMENT
TE MANATŪ WHAKAHIATO ORA

Notify the Ministry that a tenancy or household member change has occurred

You need to tell the Ministry when:

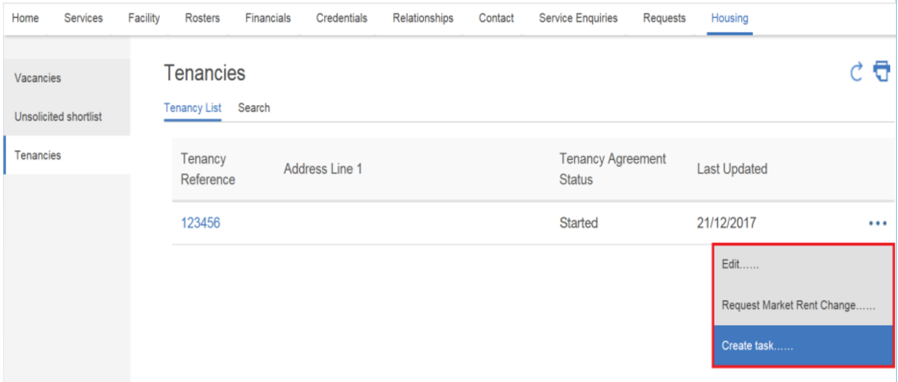
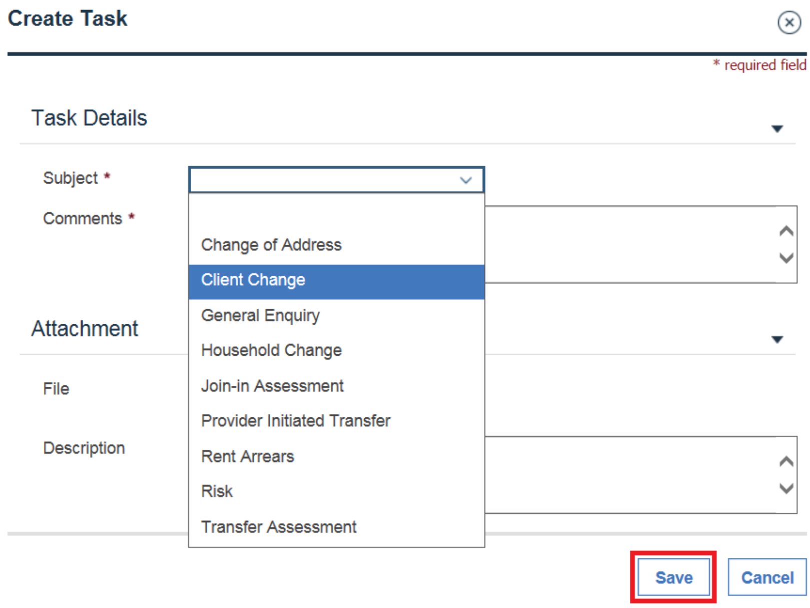
- A tenant has moved out and you have removed them from the tenancy agreement; or
- A change to the tenancy agreement has occurred due to a Tenancy Order e.g. for domestic violence; or
- You find out that a person is no longer living at the property; or
- An additional person has moved into the property; or
- Another person has joined in on the tenancy (with your agreement and the Ministry's confirmation that they are eligible for to be added as a tenant).

Description	Screenshot
Step one Navigate to the tenancy by selecting the 'Tenancy Reference' link from the tenancies list and select 'Create task' from the action menu for the tenancy Choose 'Household Change' as the subject Please refer to Appendix B for templates of information to include and select 'Save' **Note:** The Ministry will process the task manually. When they have done this, you will see that the household member has been added, their role has been updated or they have disappeared from the 'Household Details' tab	

Note: It is your responsibility to let the Ministry know if a Tenancy Order has been issued so that the Ministry can update the tenancy records. A redirection will also automatically be put in place for clients in receipt of benefit.

Advise the Ministry about a client change

If some of the household member details that you can see in BOS are incorrect or there is a death of a signatory, please tell the Ministry:

Description	Screenshot
Step one Navigate to the tenancy by selecting the ‘Tenancy Reference’ link from the tenancies list and select ‘Create task’ from the action menu for the tenancy Choose ‘Client Change’ as the subject Please refer to Appendix B for templates of information to include and select ‘Save’ **Note:** The Ministry will process the task manually. When they have done this, you may see that the household member’s details in the ‘Household Details’ tab have been corrected	 

Note: There is a new process for death of a sole signatory for a social housing property where there are occupants still residing in the property. Refer to the Community Housing Provider Operational Guidelines for the new process. If this happens, the step above must be followed using a ‘Death of a Sole Signatory’ template in Appendix B.

Advise the Ministry of household risk and household member risk information

If there is household risk or household member risk at one of your properties, please tell the Ministry. Household risk may include the suspicion of use, manufacture or sale of drugs on the premises, or gang related behaviour. Household member risk may include:

- extreme danger to staff safety
- client is physically violent, aggressive, or threatening
- client has a history of violent or aggressive or threatening behaviour
- client has known convictions for violence
- client has intimidated a staff member through written abuse or verbal abuse such as unwelcome or offensive gestures or racist and sexist comments or behaviour.

<table>
<tr><th>Description</th><th>Screenshot</th></tr>
<tr><td>

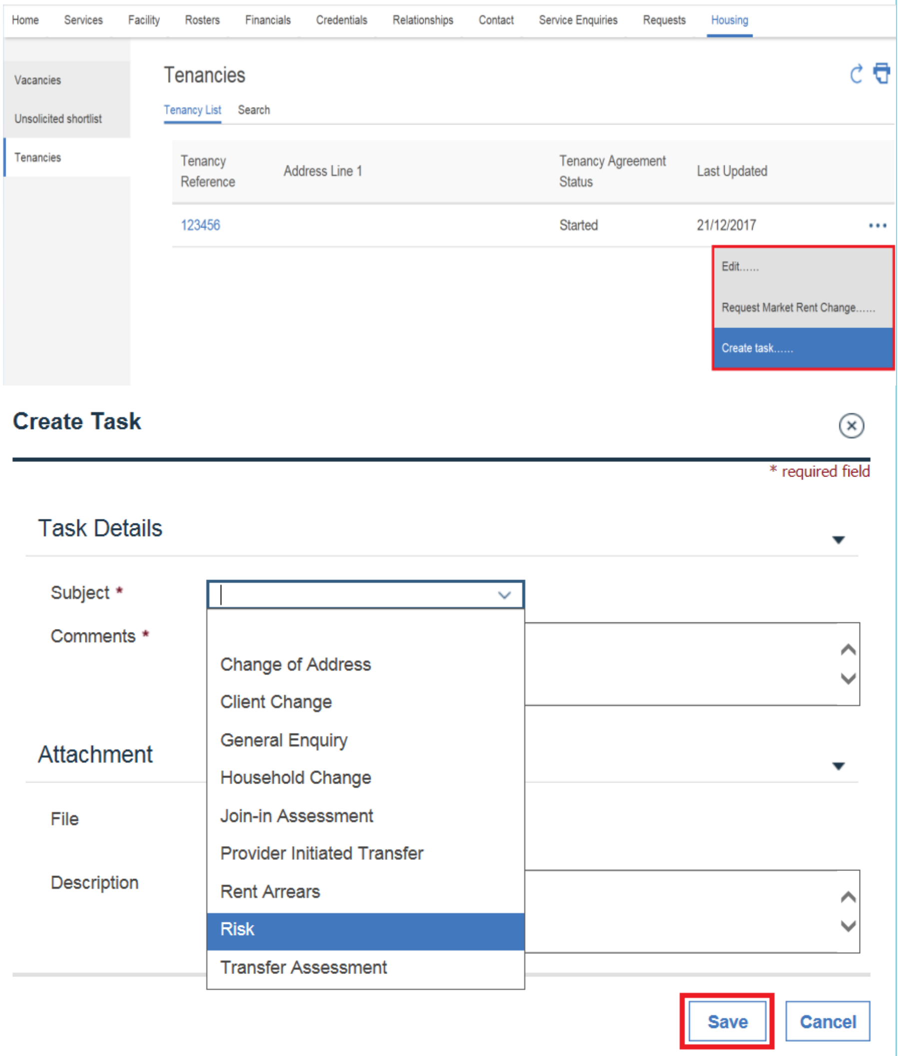
Step one

Navigate to the tenancy by selecting the 'Tenancy Reference' link from the tenancies list and select 'Create task' from the action menu for the tenancy

Choose 'Risk' as the subject

Please refer to Appendix B for templates of information to include and select 'Save'

</td><td>



</td></tr>
</table>

Request an assessment of housing needs so that the tenants can be transferred to another suitable property

If you want to move the tenants to another one of your properties, or to another provider's property, you need to check that the property is suitable first. Transfers within your own housing stock should generally be like for like. If the tenants housing needs have changed refer the client to the Ministry to have their needs reassessed.

To ask the Ministry to assess the tenant's housing needs:

<table>
<tr><th>Description</th><th>Screenshot</th></tr>
<tr><td>

Step one

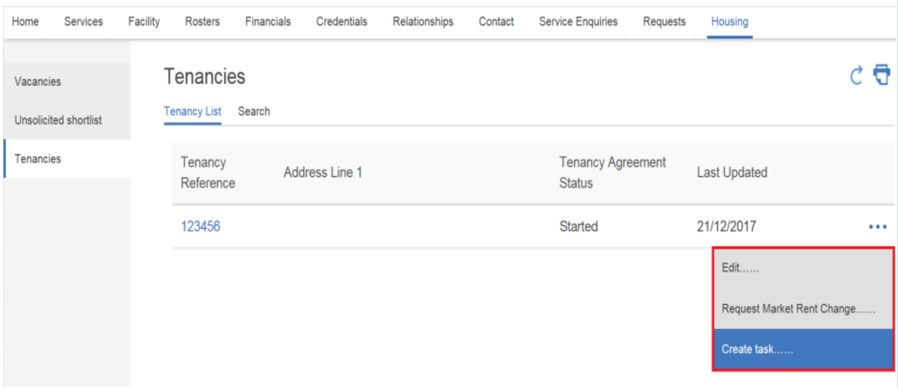
Navigate to the tenancy by selecting the 'Tenancy Reference' link from the tenancies list and select 'Create task' from the action menu for the tenancy

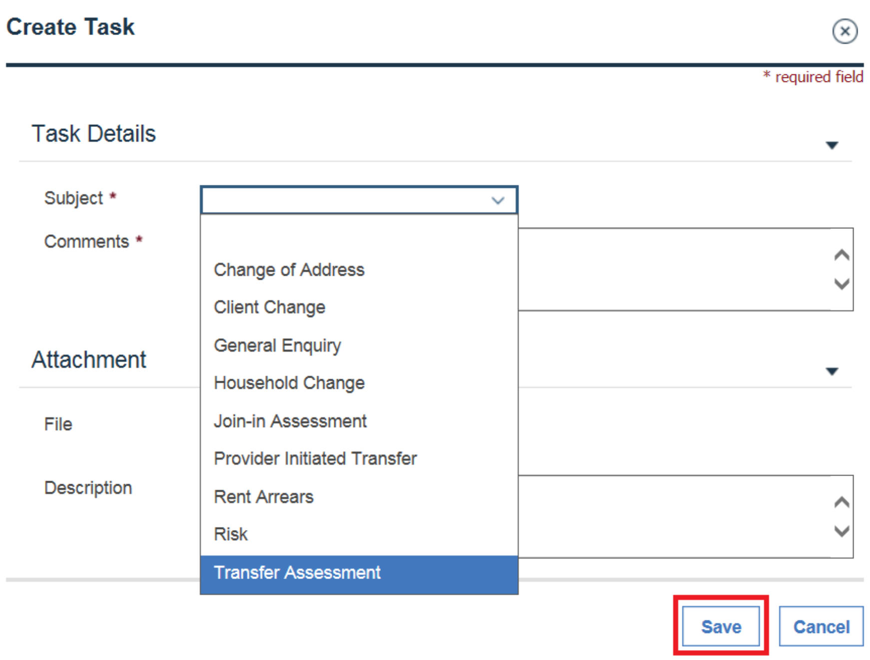
Choose 'Transfer Assessment' as the subject

Please refer to Appendix B for templates of information to include and select 'Save'

Note: The Ministry will process the task manually. You will receive a notification once the assessment has been completed

</td><td>



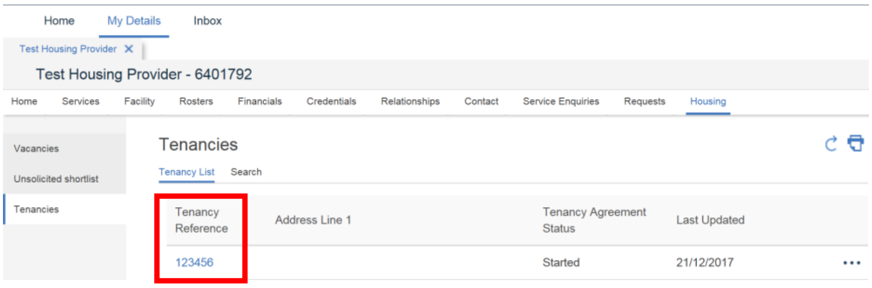
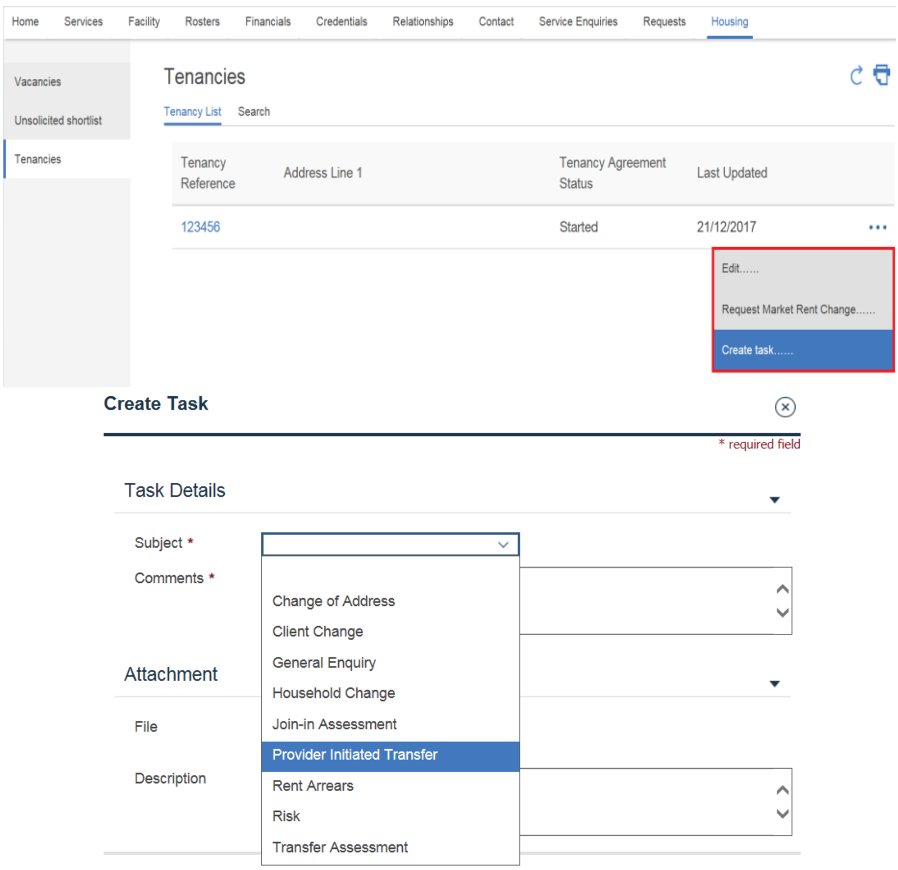


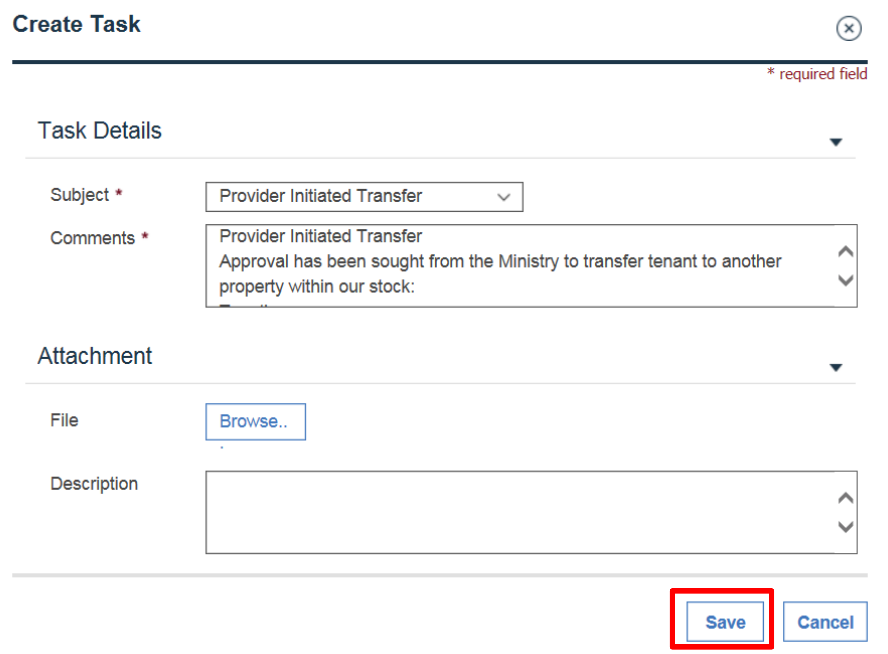
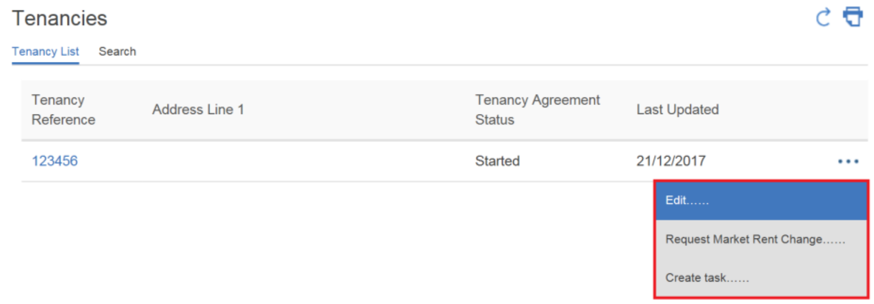
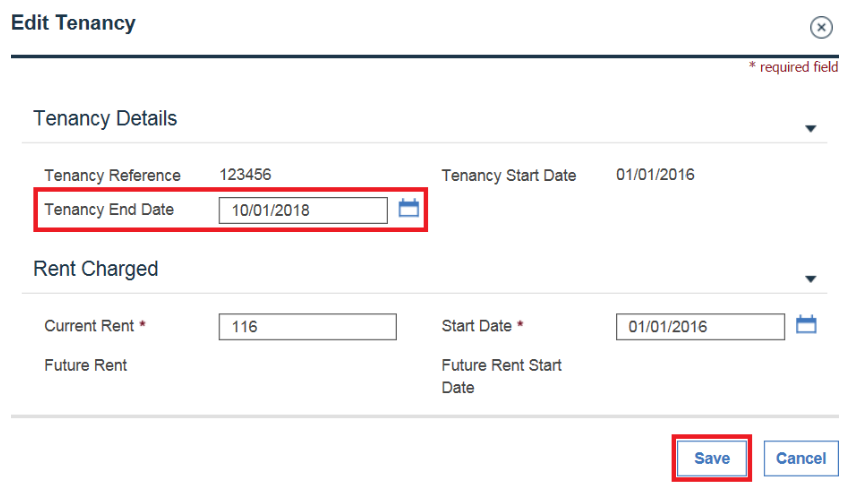
</td></tr>
</table>

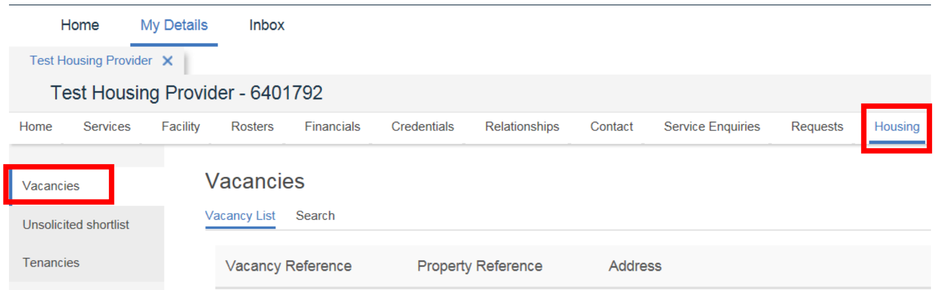
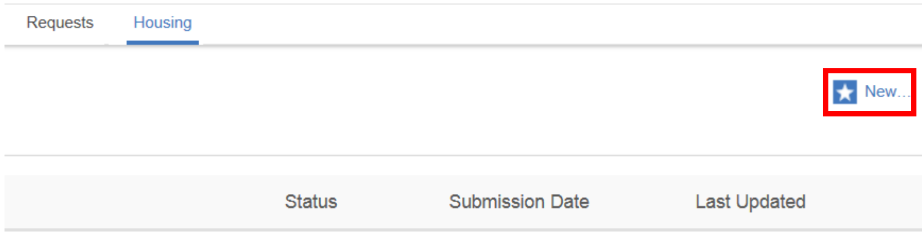
Notify the Ministry that the tenants have been transferred to another property within your stock

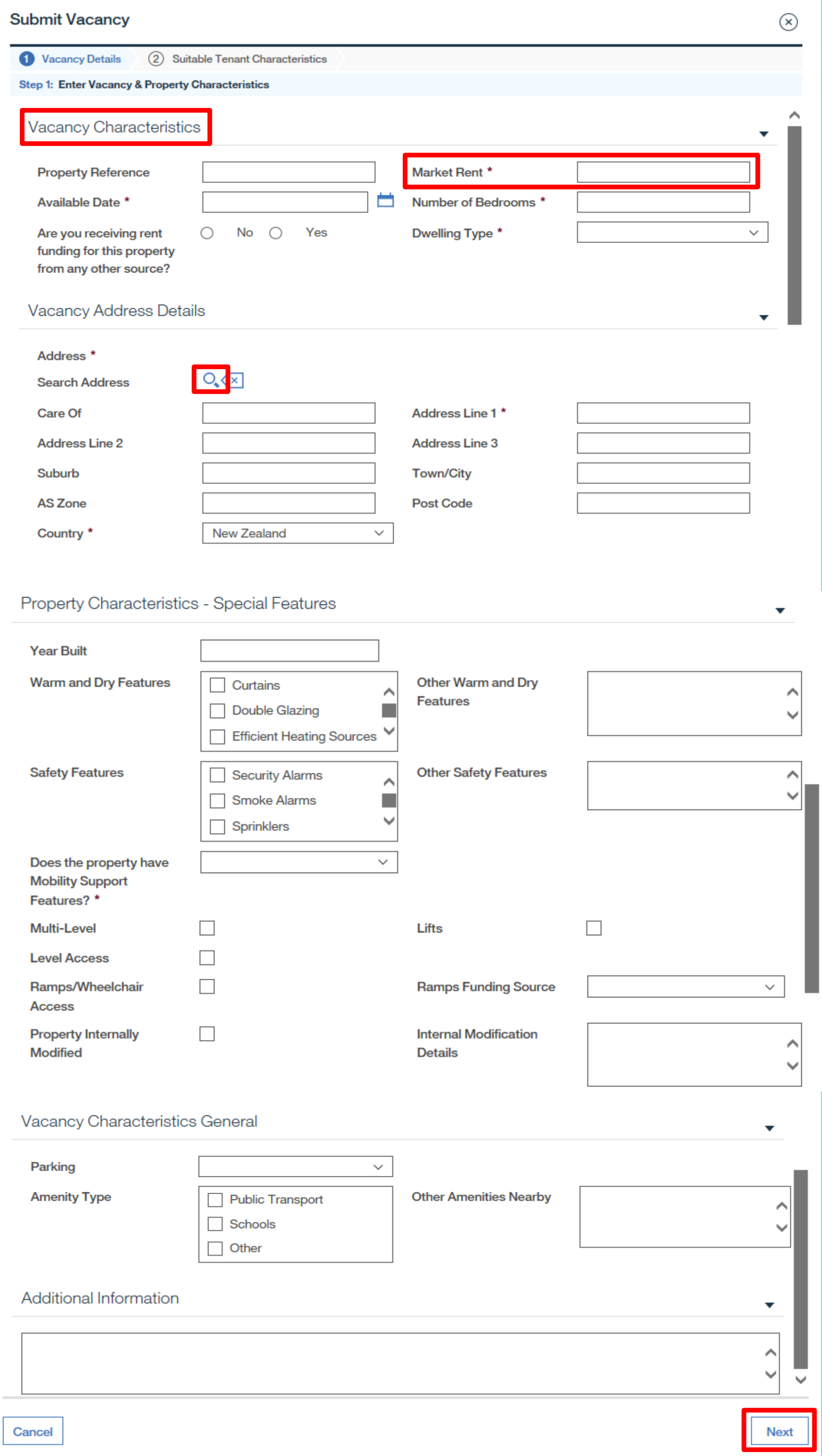
If you want to move the tenants to another one of your properties, you need to tell the Ministry after the following has been completed:

- the Ministry has assessed the tenant's housing needs (where applicable)
- the property you have identified is suitable
- the vacancy for that property has been approved
- the tenants have signed a tenancy agreement for the new property
- you have a confirmed tenancy start date.

Description	Screenshot
Step one Locate the tenancy reference for the tenant you wish to transfer	
Step two Navigate to the tenancy by selecting the 'Tenancy Reference' link from the tenancies list and select 'Create task' from the action menu for the tenancy Choose 'Provider Initiated Transfer' as the subject	

Description	Screenshot
Step three Refer to Appendix B for a ‘Provider Initiated Transfer’ template. Complete the template to include and select ‘Save’	
Step four Select ‘Edit’ from the action menu	
Step five Enter the tenancy end date and save **Note:** If an error message displays you will need to create a general enquiry task instead	

Description	Screenshot
Step six Select the ‘Vacancies’ from the left-hand side menu	
Step seven Select ‘New’ from the ‘Vacancy List’ screen	

Description	Screenshot
Step eight Fill in the vacancy details then select 'Next' **Note:** If any of the mandatory fields are left blank, error messages will display at the top of the 'Submit Vacancy' screen. Otherwise the 'Suitable Tenant Characteristics' screen displays Vacancy address details must be searched using the magnifying glass. If the address you are searching for is not already in the system you need to select 'Create New'.	

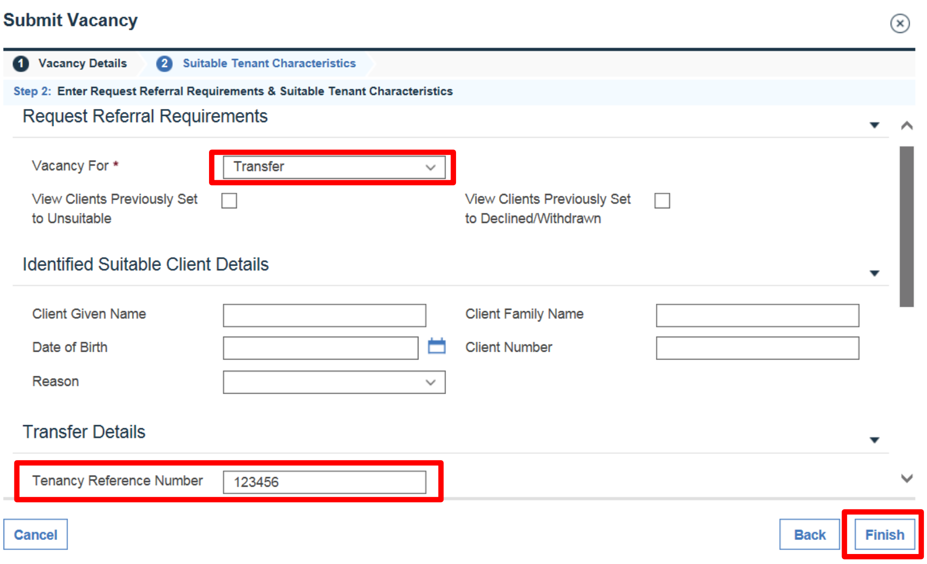
<table>
<tr><th>Description</th><th>Screenshot</th></tr>
<tr><td>

Step nine

List the vacancy to which the tenant is being transferred. Under the ‘Suitable Tenant Characteristics’ tab you will need to select transfer and add the tenancy reference of the existing tenancy under the transfer details heading. Select ‘Finish’

Note: The Ministry will process the task manually. When they have done this, you will see a new tenancy after the tenancy start date in the Tenancy List

</td><td>



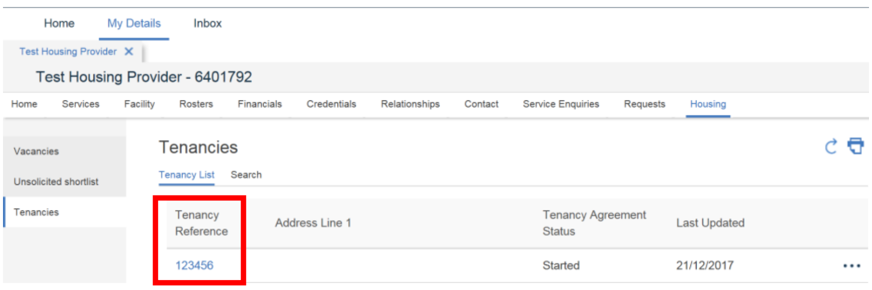
</td></tr>
</table>

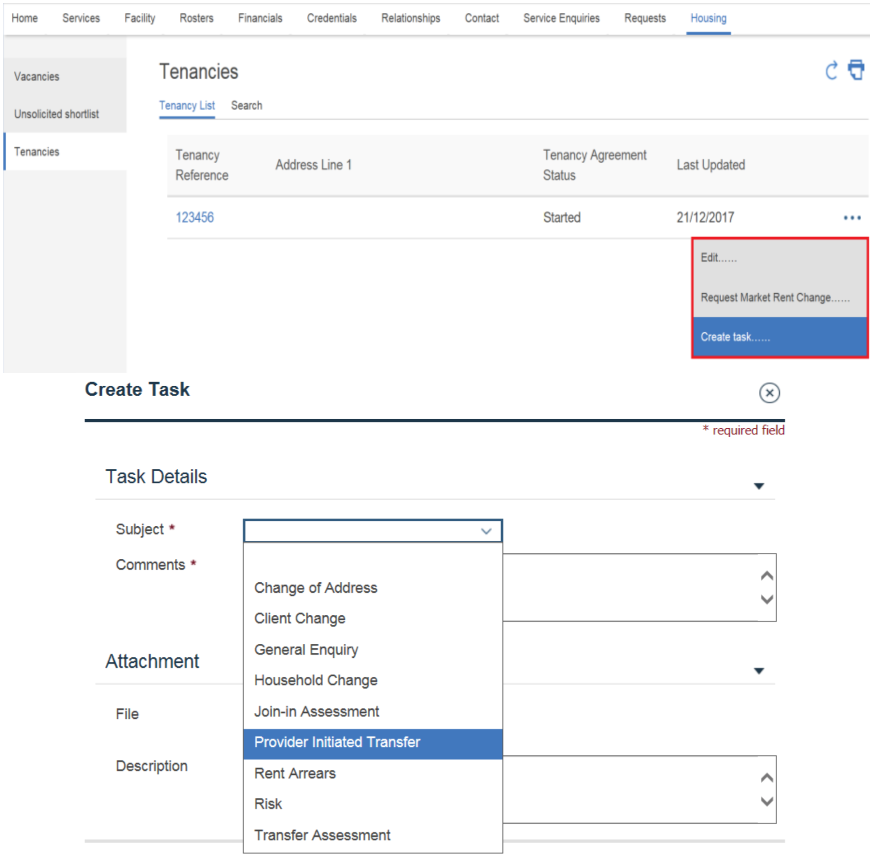
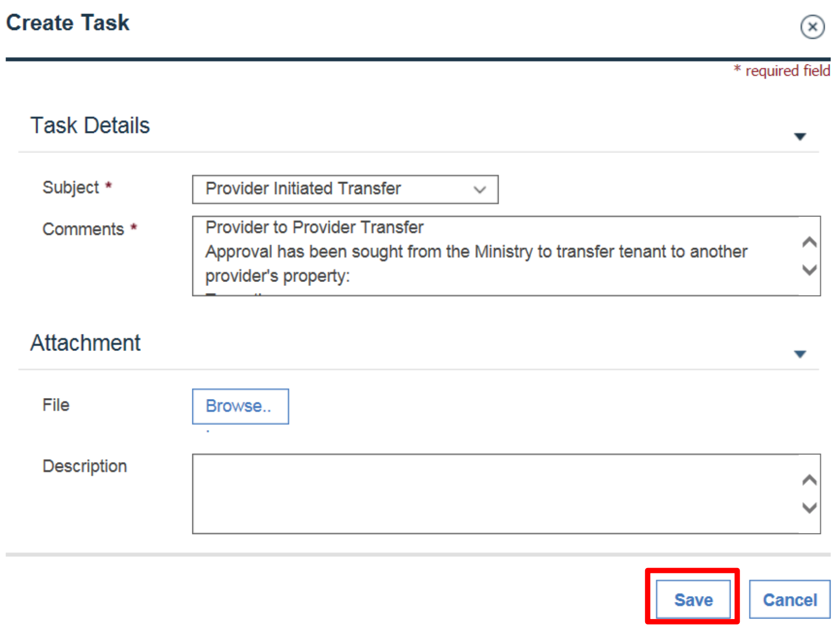
Notify the Ministry that the tenants have been transferred to/from another provider's property

If the tenants move to/from another provider's property, the primary provider (the primary provider is the one transferring the existing tenant to a new provider's property) must submit a Provider to Provider Transfer approval request form to the Ministry for approval prior to the transfer. You must work collaboratively with the other provider, following the steps below and notifying the Ministry after the following has been completed:

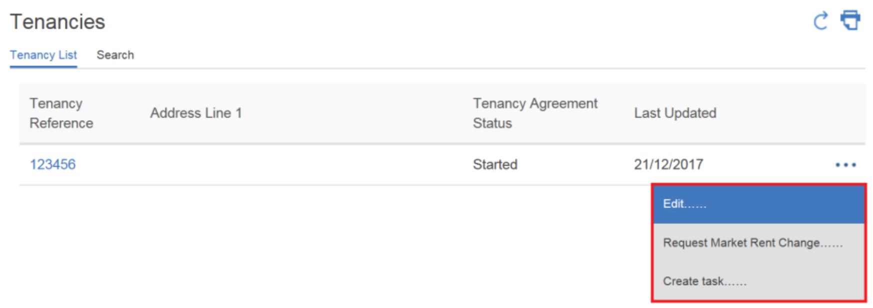
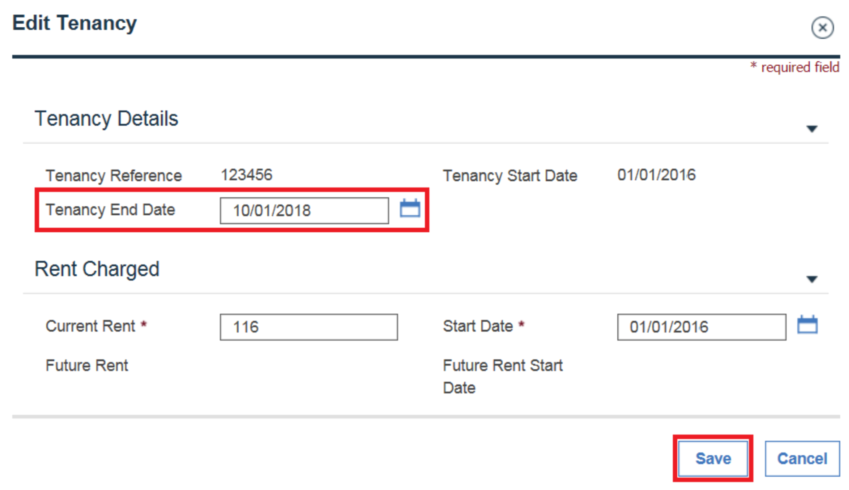
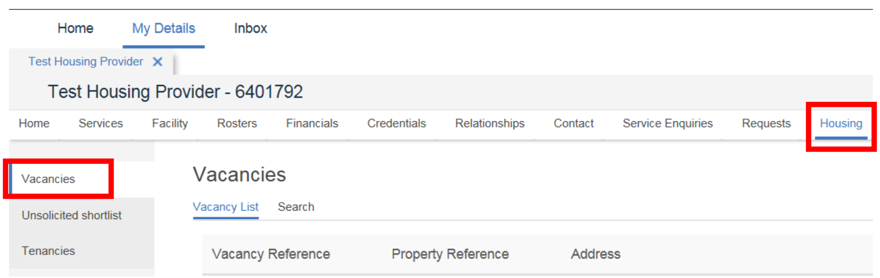
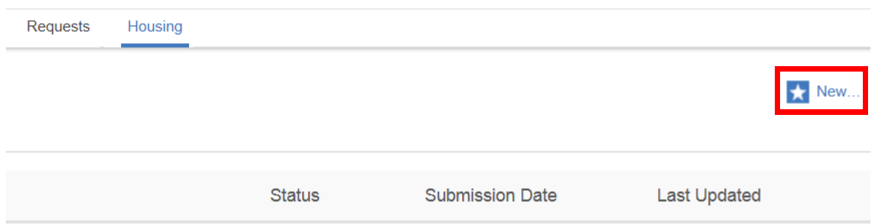
- the property identified is suitable and is like-for-like
- the vacancy for that property has been approved
- the tenants have signed a tenancy agreement for the new property
- you have a confirmed tenancy start date.

Note: Housing New Zealand Corporation do not use BOS.

Description	Screenshot
Step one – PRIMARY PROVIDER ONLY To obtain the approval request form, email Housing_Provider_Support@msd.govt.nz Complete the Provider to Provider Transfer approval request form and send through ShareFile	
Step two – PRIMARY PROVIDER ONLY After the Ministry has approved the transfer, locate the tenancy reference for the tenant you wish to transfer	

Description	Screenshot
Step three – PRIMARY PROVIDER ONLY Navigate to the tenancy by selecting the 'Tenancy Reference' link from the tenancies list and select 'Create task' from the action menu for the tenancy Choose 'Provider Initiated Transfer' as the subject	
Step four – PRIMARY PROVIDER ONLY Refer to Appendix B for a 'Provider to Provider Transfer' template. Complete the template to include, attach a file as supporting information if required and select 'Save'	

MINISTRY OF SOCIAL DEVELOPMENT
TE MANATŪ WHAKAHIATO ORA

Description	Screenshot
Step five – PRIMARY PROVIDER ONLY Select 'Edit' from the action menu	
Step six – PRIMARY PROVIDER ONLY Enter the tenancy end date and save **Note:** If an error message displays you will need to create a general enquiry task instead	
Step seven – NEW PROVIDER ONLY Select the 'Housing' tab and then 'Vacancies' from the left-hand side menu	
Step eight – NEW PROVIDER ONLY Select 'New' from the 'Vacancy List' screen	

<table>
<tr><th>Description</th><th>Screenshot</th></tr>
<tr><td>

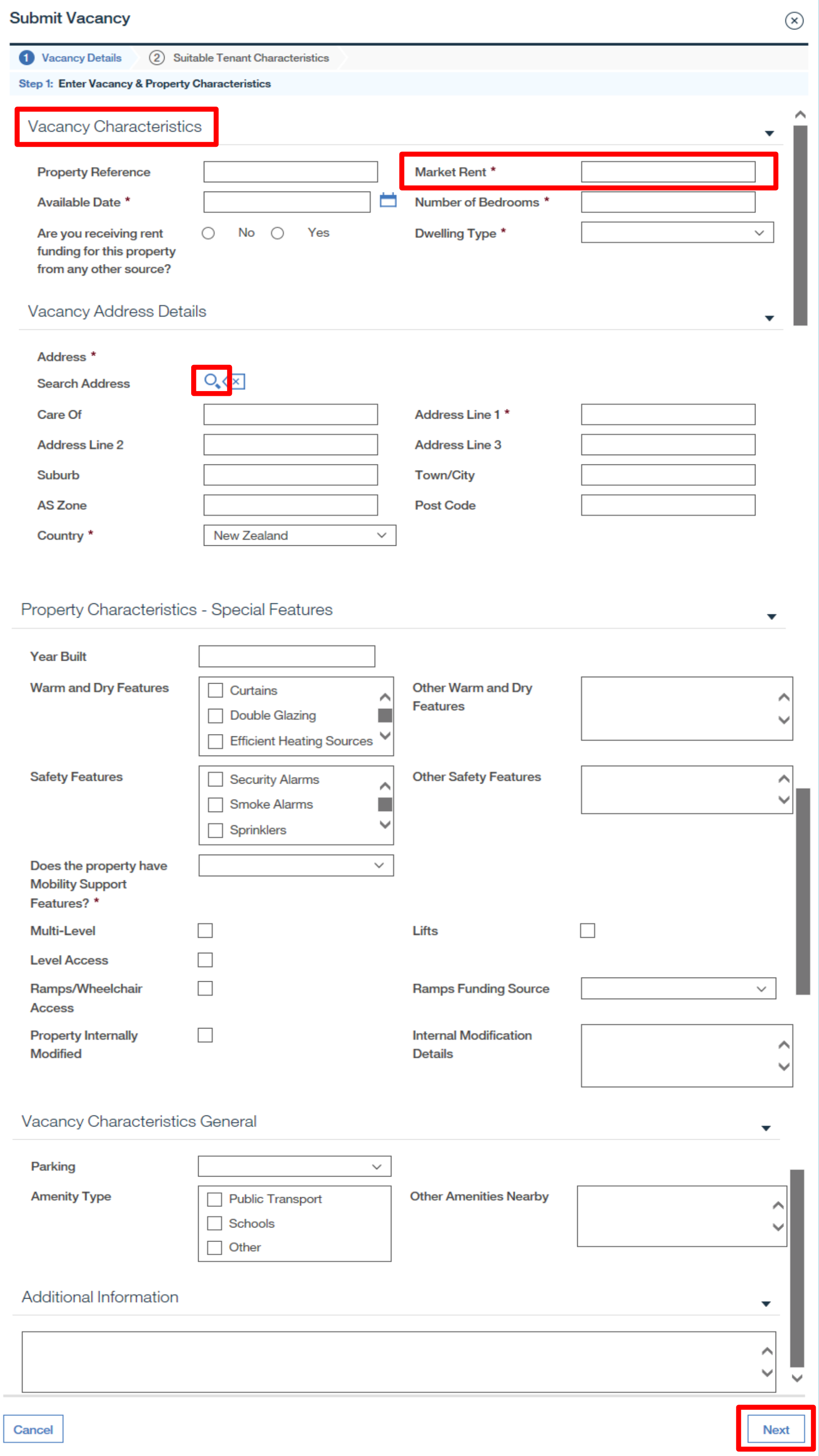
Step nine – NEW PROVIDER ONLY

Fill in the vacancy details then select ‘Next’

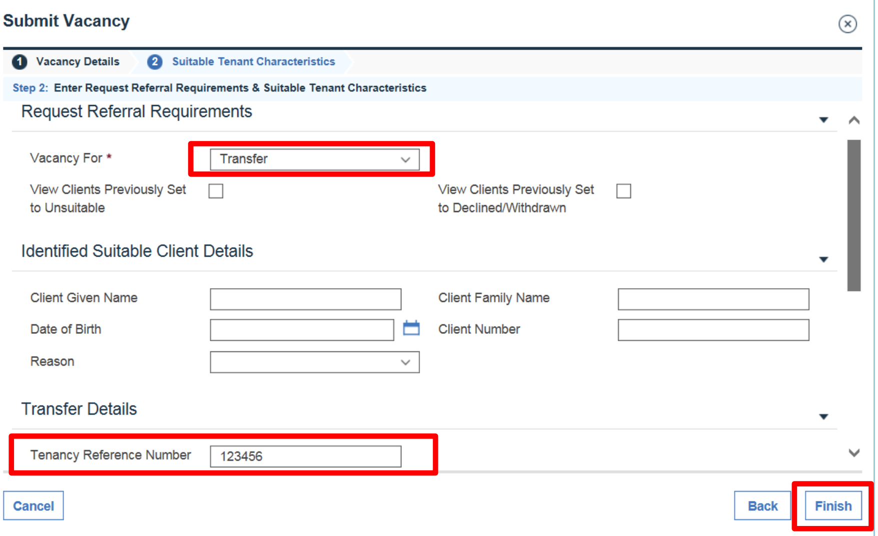
Note: If any of the mandatory fields are left blank, error messages will display at the top of the ‘Submit Vacancy’ screen. Otherwise the ‘Suitable Tenant Characteristics' screen displays

Vacancy address details must be searched using the magnifying glass. If the address you are searching for is not already in the system you need to select ‘Create New’.

</td><td>



</td></tr>
</table>

Description	Screenshot
Step ten – NEW PROVIDER ONLY List the vacancy to which the tenant is being transferred. Under the ‘Suitable Tenant Characteristics’ tab you will need to select transfer and add the tenancy reference of the new tenancy under the transfer details heading. Select ‘Finish’ **Note:** The Ministry will process the task manually. When they have done this, you will see a new tenancy after the tenancy start date in the Tenancy List	

Notify the Ministry that the tenancy has ended

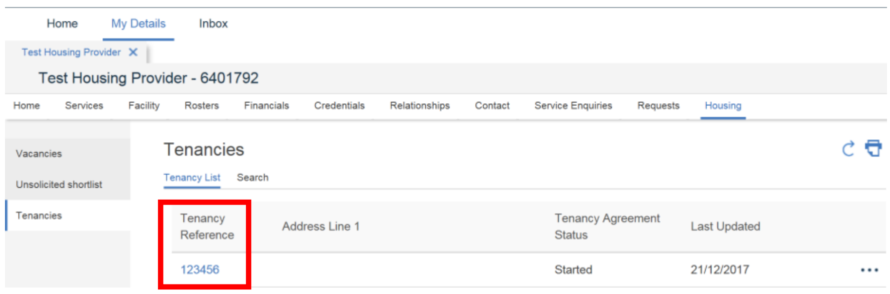
When all the tenants have moved out, and you are no longer charging rent, you need to tell the Ministry:

<table>
<tr><th>Description</th><th>Screenshot</th></tr>
<tr><td>

Step one

Navigate to the tenancy by selecting the 'Tenancy Reference' link from the tenancies list

</td><td>

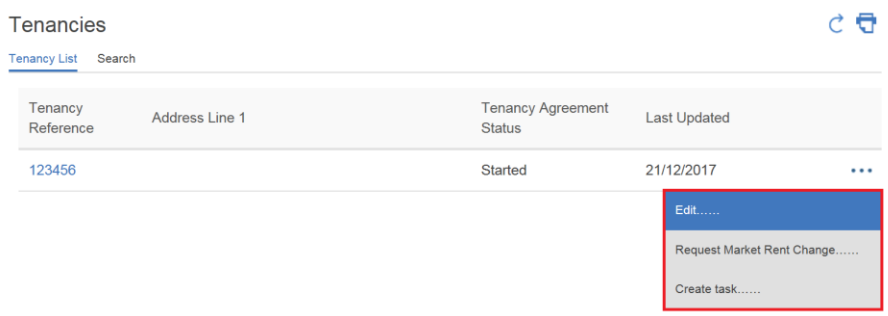


</td></tr>
<tr><td>

Step two

Select 'Edit' from the action menu

</td><td>

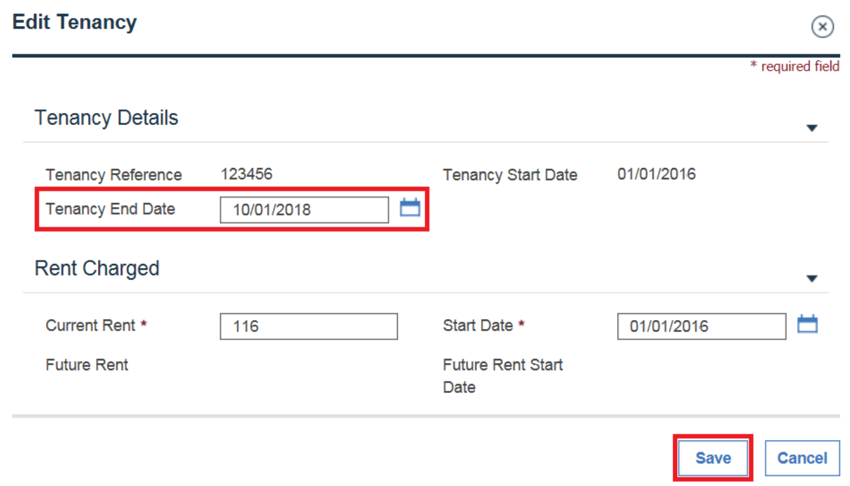


</td></tr>
<tr><td>

Step three

Enter the last day that you charged rent in the 'Tenancy End Date' field

</td><td>



</td></tr>
</table>

You are able to list this property as a new vacancy once you have confirmed the date the property will be available.

In a situation where the tenancy end date is entered in error and the tenancy is going to continue, the end date must be removed before that date is reached if the 'Tenancy Agreement Status' is still showing 'Started'. If the status is 'Completed' or the tenancy has disappeared from the 'Tenancies' list, email GNL_Provider_Support@msd.govt.nz to request a reinstatement of the tenancy.

Advise the Ministry of correction to the tenancy end date

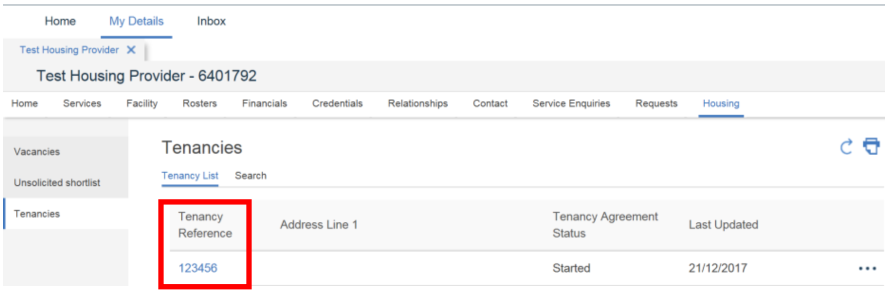
If you have entered an incorrect end date, you need to tell the Ministry:

<table>
<tr><th>Description</th><th>Screenshot</th></tr>
<tr><td>

Step one

Navigate to the tenancy by selecting the ‘Tenancy Reference’ link from the tenancies list

</td><td>

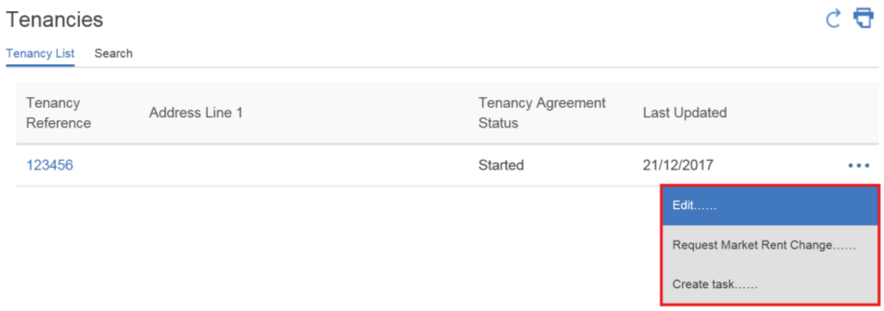


</td></tr>
<tr><td>

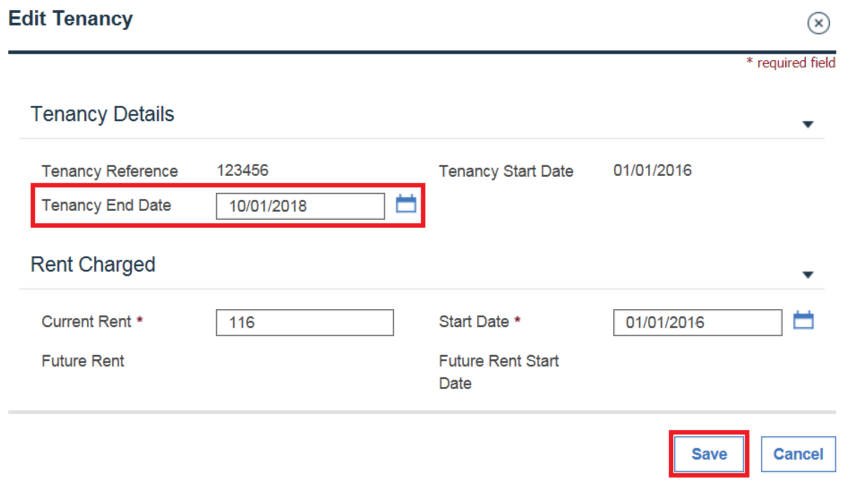
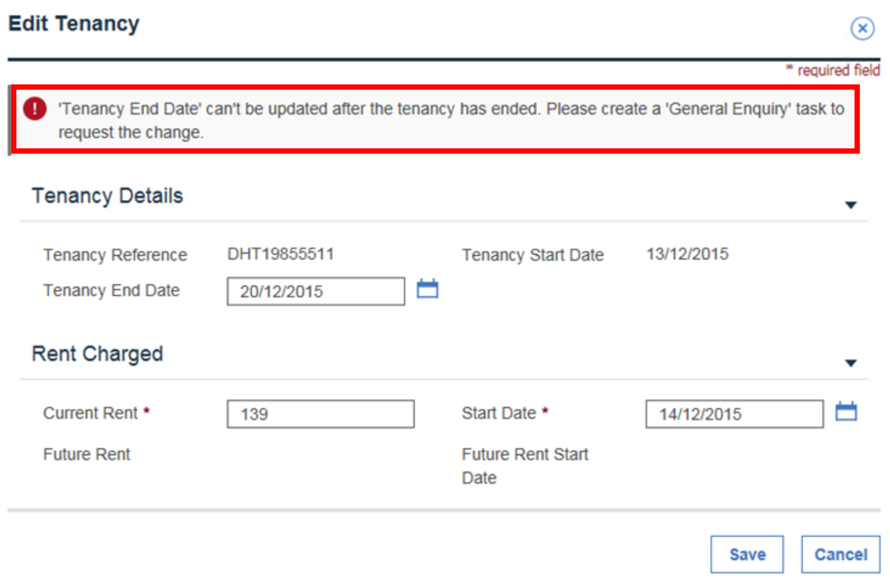
Step two

Select ‘Edit’ from the action menu

</td><td>



</td></tr>
</table>

Description	Screenshot
Step three Fix the tenancy end date **Note:** If an error message displays you will need to create a general enquiry task instead	 **Error message that may display** 

Part 4: Notifications – ADMINISTRATOR ONLY

Receive notification

If you have an Administrator role you will receive an email when notifications are sent through from the Ministry.

'My Notifications' work the same way as an email inbox – that is each notification generated for a provider is sent to each user.

If one user deletes a notification, it will not delete the notification from another users inbox.

<table>
<tr><th>Description</th><th>Screenshot</th></tr>
<tr><td>

Step one

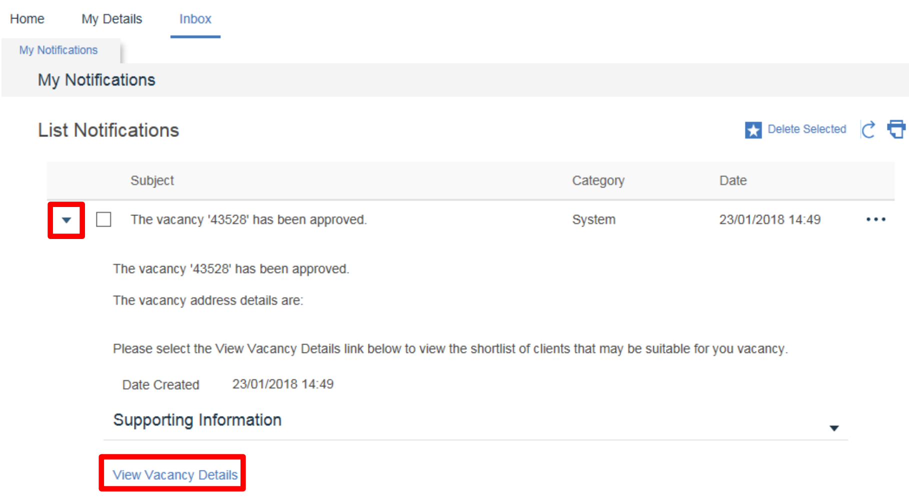
Expand the message by selecting the arrow to the side of the subject line and read the notification

By selecting the 'View Vacancy Details' link from within the notification you will be able to view the vacancy

The types of notifications you may receive include:

- Vacancy related (approved, declined, cancelled)
- Referral request
- Unsolicited shortlist
- IRR review
- Market Rent changes

</td><td>



Note: Once the mail box is displaying xxx of xxx in the top left corner of the 'List Notifications' screen, you need to delete some of the notifications in order to receive new ones. To delete, tick the box on the left side of the notification and then select 'Delete Selected'.

</td></tr>
</table>

<table>
<tr><th>Description</th><th>Screenshot</th></tr>
<tr><td>

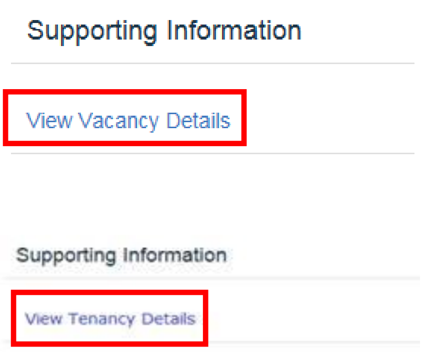
Step two

Some notifications will provide additional links under supporting information such as:

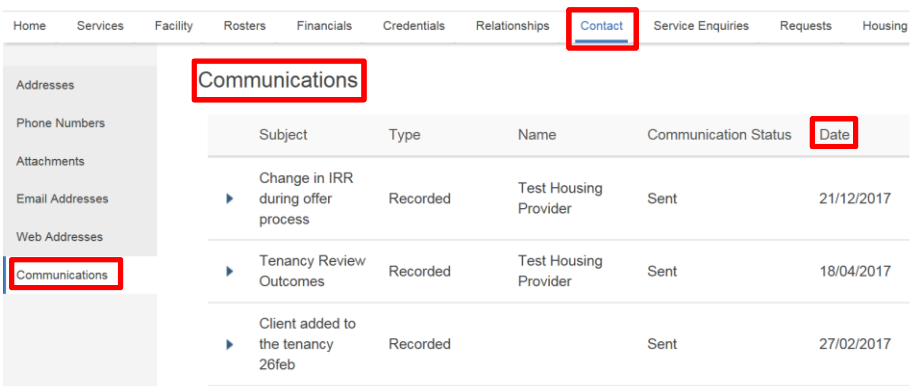
- 'View Vacancy'
- 'View Tenancy Details'

You can select the link to navigate to the supporting information e.g. vacancy or tenancy details

</td><td>



</td></tr>
<tr><td></td><td>



Note: Once you have completed the action for the notification you may delete the notification if you wish.

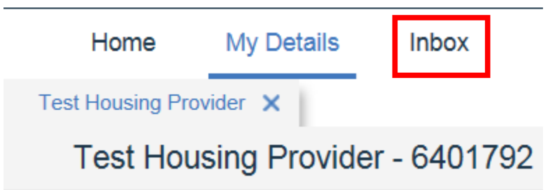
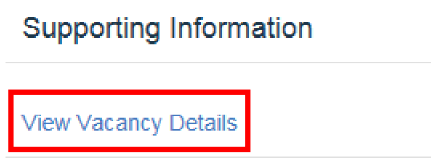
If you need to view a past notification (that has been deleted from your Inbox), you can view it by navigating to the Contact tab and clicking on Communications. Notifications are displayed in date order, but you can sort by clicking on the heading text in the yellow band at the top. Each column can be sorted either top to bottom or bottom to top, however you can only sort by one heading at a time.

</td></tr>
</table>

Description	Screenshot
Other notifications may include: • Decline reason – review the decline reason, and if required, re-submit the vacancy, by navigating back to the property and update the relevant details • Unsolicited shortlist – if you have a property that might be suitable for an applicant on the unsolicited shortlist, navigate to the unsolicited shortlist and request a referral for that applicant. Otherwise, take no further action • Rent changes – navigate to the tenancy and start your rent change process if appropriate (decreases need to be actioned immediately in BOS but IRR increases are not to be actioned in BOS until seven days prior to the effective date) • Tenancy management – refer to part three of this user guide.	

Receive a request for information about rent arrears

The Ministry may assess an IRR overpayment and, before paying the refund to the tenant, may ask you if the tenant is in rental arrears. If you have an administrator role you will get an email notification:

Description	Screenshot
Step one Once you have read your email, log into BOS and select 'Inbox' Navigate to the notification and read the details	
Step two Selecting the 'View Tenancy Details' link in the notification you will be able to view the tenancy	
Step three Check the tenant's rent account to see if there are any rent arrears owing for the specified refund period **Note:** This information will be found within your own records, separate from BOS	

MINISTRY OF SOCIAL DEVELOPMENT
TE MANATŪ WHAKAHIATO ORA

Description	Screenshot
Step four Complete the 'Request for rent arrears information form' and advise the Ministry about the amount of rent arrears owed. If there are no rent arrears for the specified refund period, write 'No arrears'	
Step five Notify the Ministry of any rent arrears owing. Refer to 'Advise the Ministry about the amount of rent arrears owed' in Part 3 –Tenancy Management	

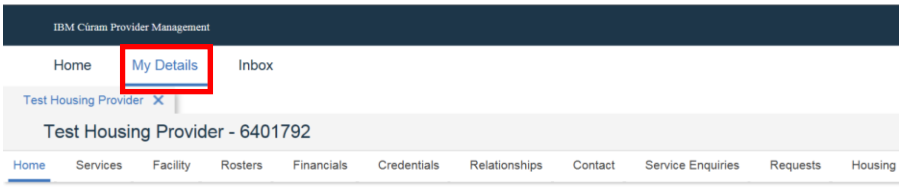
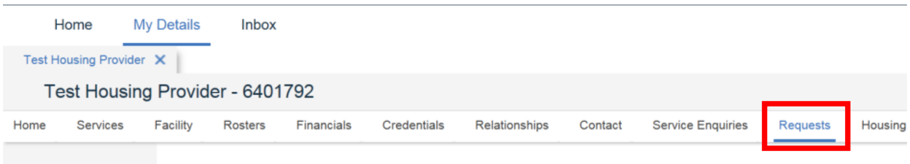
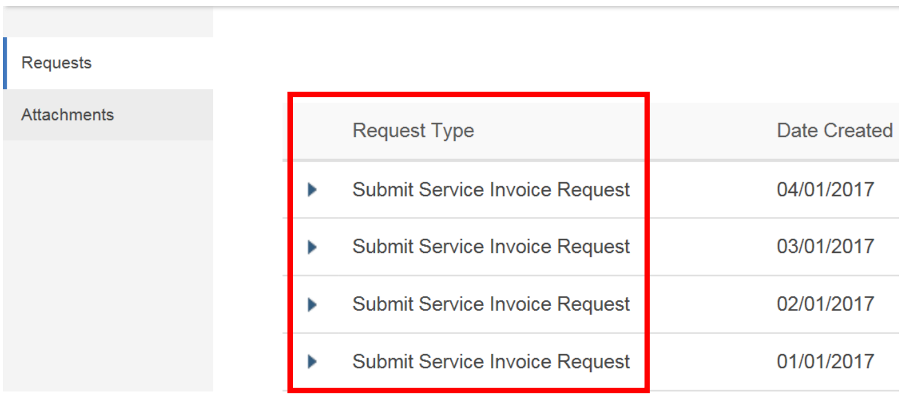
Part 5: Financial Management – FINANCIAL ADMINISTRATOR ONLY

View an IRRS fortnightly schedule

Every two weeks a new IRRS fortnightly schedule will be created in BOS – these are called Service Invoice Requests. You can view these if you have a financial administrator role. Schedules should be downloaded and reconciled before the financial period ends. If you identify any differences in IRRS between schedule and your information:

- if you identify that your information is incorrect, update your system
- if the information you have entered into BOS is incorrect, please edit the information or create a task to advise the Ministry of the correction.

Note: You should ensure that notifications (such as updating IRR amounts) that have an effective date within this financial period have been actioned prior to reconciliation.

Description	Screenshot
Step one Log into BOS and select 'My Details'	
Step two Select the 'Requests' tab	
Step three Locate the 'Service Invoice Request' you want to view	

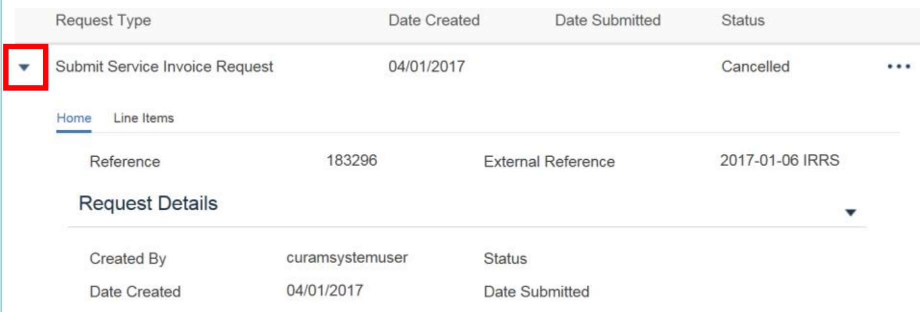
MINISTRY OF SOCIAL DEVELOPMENT
TE MANATŪ WHAKAHIATO ORA

<table>
<tr><th>Description</th><th>Screenshot</th></tr>
<tr><td>

Step four

Expand it to view the home tab

</td><td>

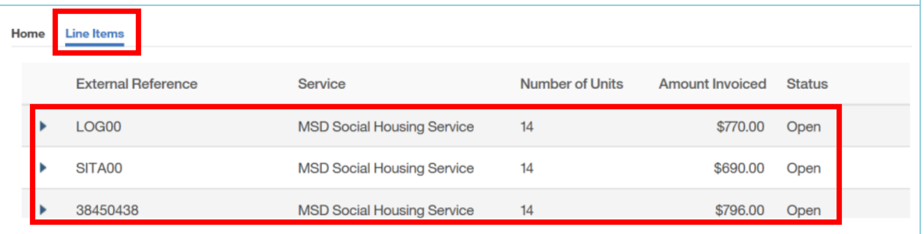


</td></tr>
<tr><td>

Step five

Navigate to the ‘Line Items’ tab to view the IRRS amounts for each tenancy

</td><td>



</td></tr>
<tr><td>

Step six

Expand to view the individual line item

Descriptions as bellow:

External Reference: Tenancy Reference

Service Date From: Start date of the invoice

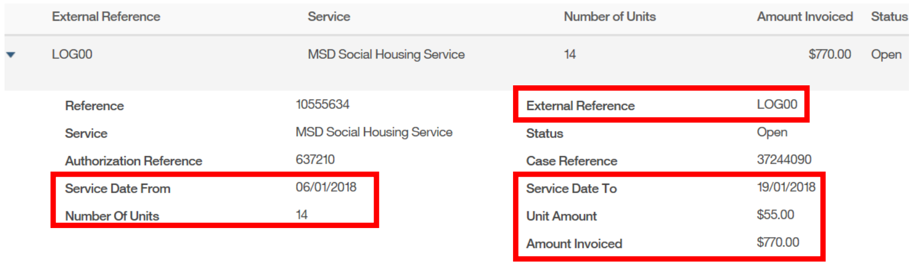
Service Date To: End date of the invoice

Number of Units: Number of days to be invoiced

Unit Amount: IRRS as a daily amount (e.g. Market Rent minus IRR divided by 14)

Amount Invoiced: Number of Units x Unit Amount (e.g. the IRRS amount the CHP can invoice)

</td><td>

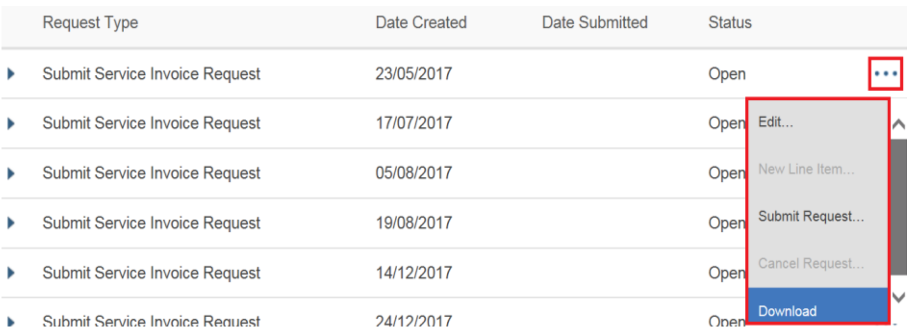
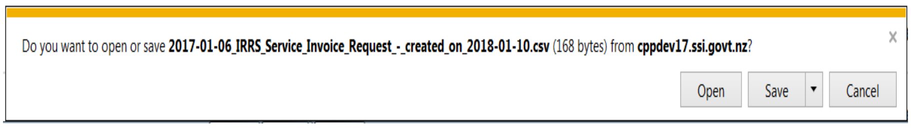


</td></tr>
</table>

Download an IRRS fortnightly schedule

If you have a financial administrator role you can also download Service Invoice Requests for analysis. You may review the schedule any time within the fortnightly invoicing period. If you notice any anomalies, please email Housing_Provider_Support@msd.govt.nz.

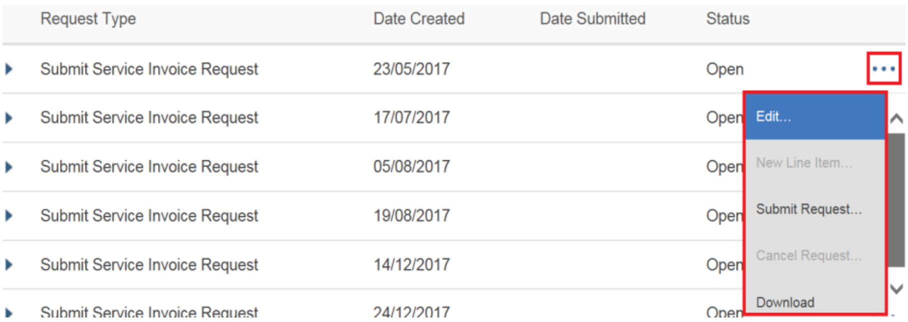
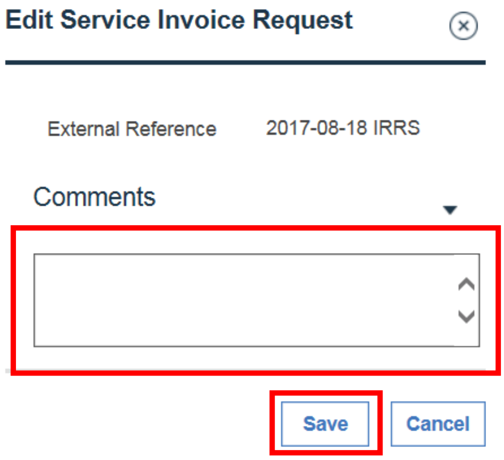
Note: You must not include tenant information in any emails.

Description	Screenshot
Step one Log into BOS and select 'My Details' Navigate to the 'Requests' tab, locate the 'Service Invoice Request' you want to view and select 'Download' from the action menu	
Step two Select 'Open' to view the invoice in Excel or select 'Save'/'Save As' to save the file in a secure location	The following options will display at the bottom of the screen 

MINISTRY OF SOCIAL DEVELOPMENT
TE MANATŪ WHAKAHIATO ORA

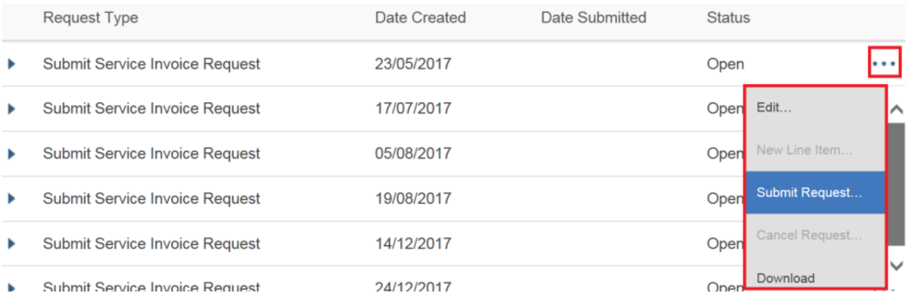
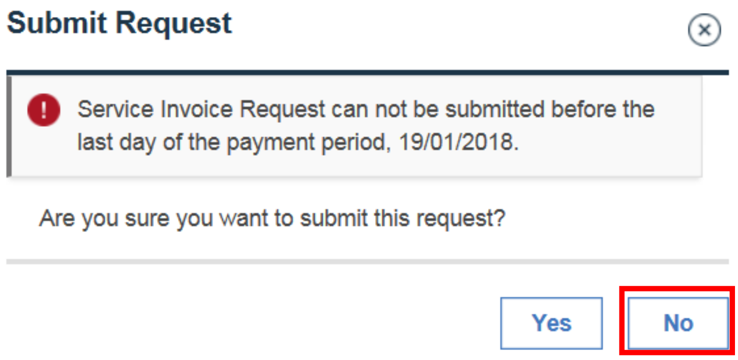
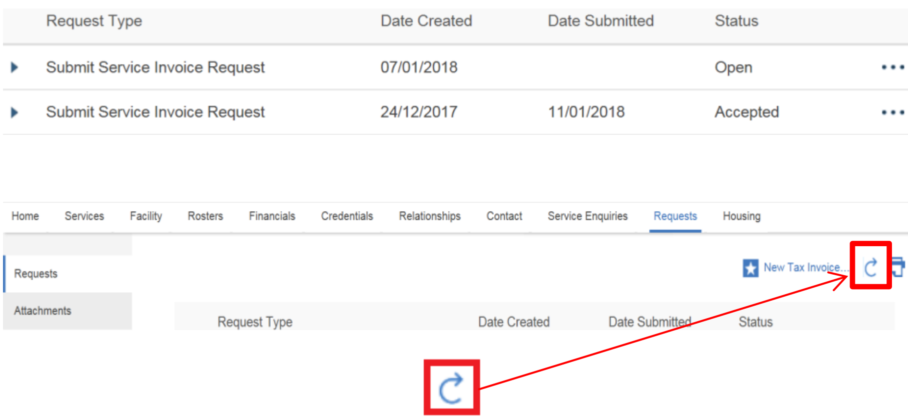
Comment on an IRRS fortnightly schedule

If you have not identified and reconciled any differences to the schedule prior to the financial period you can add notes on your confirmation. For example if the system has an inaccurate record that you are unable to update, you will need to add a comment to the Service Invoice Request:

Description	**Screenshot**
Step one Log into Business Online Services and select ‘My Details’ Navigate to the ‘Requests’ tab, locate the ‘Service Invoice Request’ you want to comment and select ‘Edit’ from the action menu	
Step two Add your comment in the ‘Comments’ field and select ‘Save’	

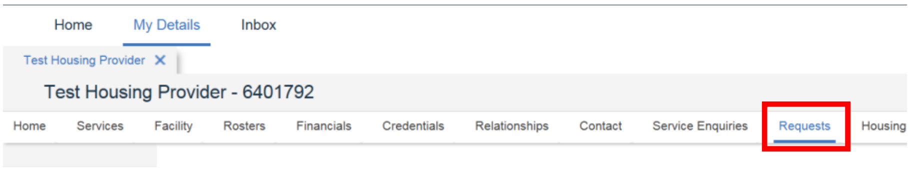
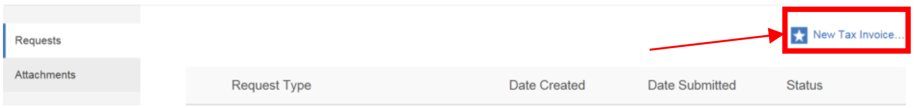
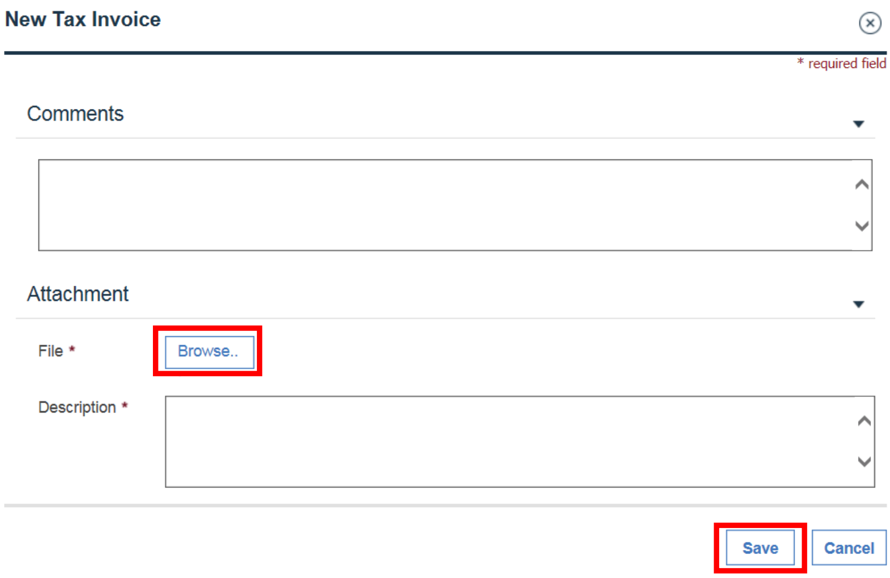
Submit IRRS schedule (no earlier than the Monday following the last day of the fortnight period)

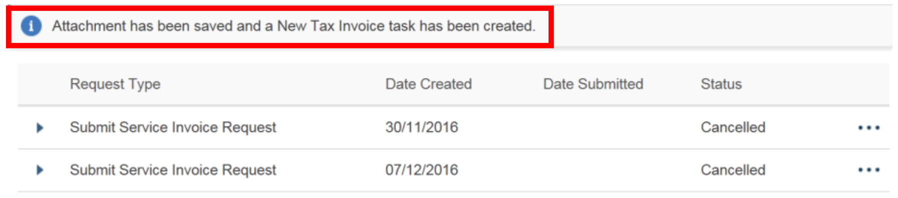
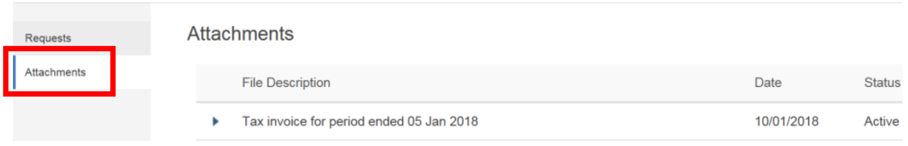
For contractual purposes, the act of submitting the invoice is treated as a confirmation by you that the information contained in the Service Invoice Request accurately reflects the services provided by your organisation.

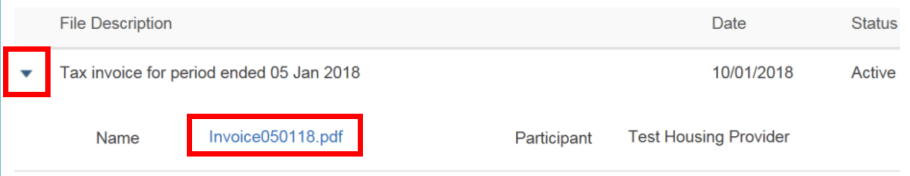
<table>
<tr><th>Description</th><th>Screenshot</th></tr>
<tr><td>Step one
Locate the ‘Service Invoice Request’ you want to submit and select ‘Submit Request’ from the action menu</td><td>
</td></tr>
<tr><td>If you attempt to submit the Service Invoice Request before the end of the fortnightly financial cycle you will receive an error message. You will need to resubmit the schedule after the end of the fortnightly invoicing period</td><td>
</td></tr>
<tr><td>Step two
Select ‘Yes’</td><td>
</td></tr>
<tr><td>The Request screen will redisplay with the ‘Date Submitted’ and the ‘Status’ updated to ‘Accepted’. This may take up to 15 minutes. If the Status does not update you may need to refresh the screen using the refresh key</td><td>
</td></tr>
</table>

Upload an IRRS tax invoice

Once you have confirmed and submitted the Service Invoice Request, upload your tax invoice as an attachment so that your organisation can get paid the IRRS. Please make sure your invoice conforms to the Ministry's minimum invoicing standards. If you are not sure, please contact the Ministry Strategic Purchasing team Housing_Provider_Support@msd.govt.nz with queries.

Description	Screenshot
Step one Log into BOS, select 'My Details' and navigate to the 'Requests' tab	
Step two Select 'New Tax Invoice'	
Step three Select 'Browse', find the invoice you want to attach within your computer's documents and follow the steps identified to upload this file (note: this filename will not display) Enter a description for the file e.g. invoice for period x to y and select 'Save' **Note**: When you are uploading a file to BOS the filename must be alphanumeric. It must only contain alphabetic characters, A to Z, and numerals, 0 to 9, it must not contain any spaces, e.g. a valid filename is 150526Invoice	 **Note:** File name and description will display, please make them useful and meaningful to you.

<table>
<tr><th>Description</th><th>Screenshot</th></tr>
<tr><td>A notification will display on screen to confirm that the attachment has been saved</td><td>
</td></tr>
<tr><td>To view the uploaded invoice, select the ‘Attachments’ tab</td><td>
</td></tr>
<tr><td>Expand the file description to view the file name

Select the name of the file to view what you have uploaded</td><td>
</td></tr>
</table>

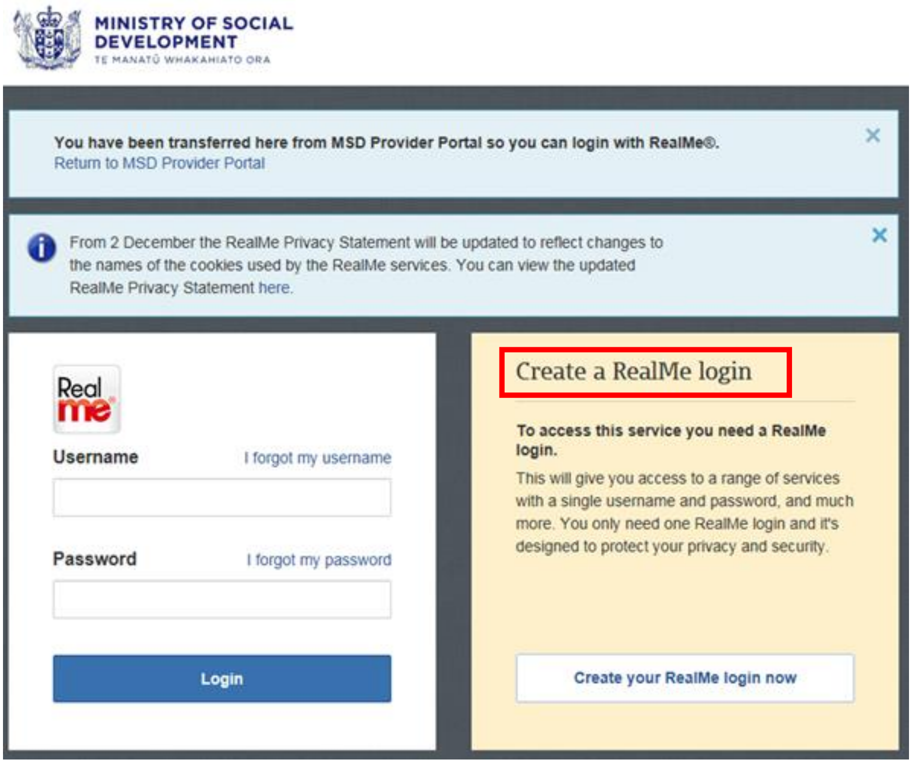
MINISTRY OF SOCIAL DEVELOPMENT
TE MANATŪ WHAKAHIATO ORA

Appendix A ~ How to login

Setting up a RealMe account

For you to use BOS you must have a RealMe account which you will need to use each time you login. If you don't have a RealMe account you will be redirected to create one. The following system pathway shows the steps you will need to follow to set one of these up.

Note: You can use an existing RealMe account if you already have one.

Description	Screenshot
Step one To create a RealMe account click on the 'Create your RealMe login now' link	

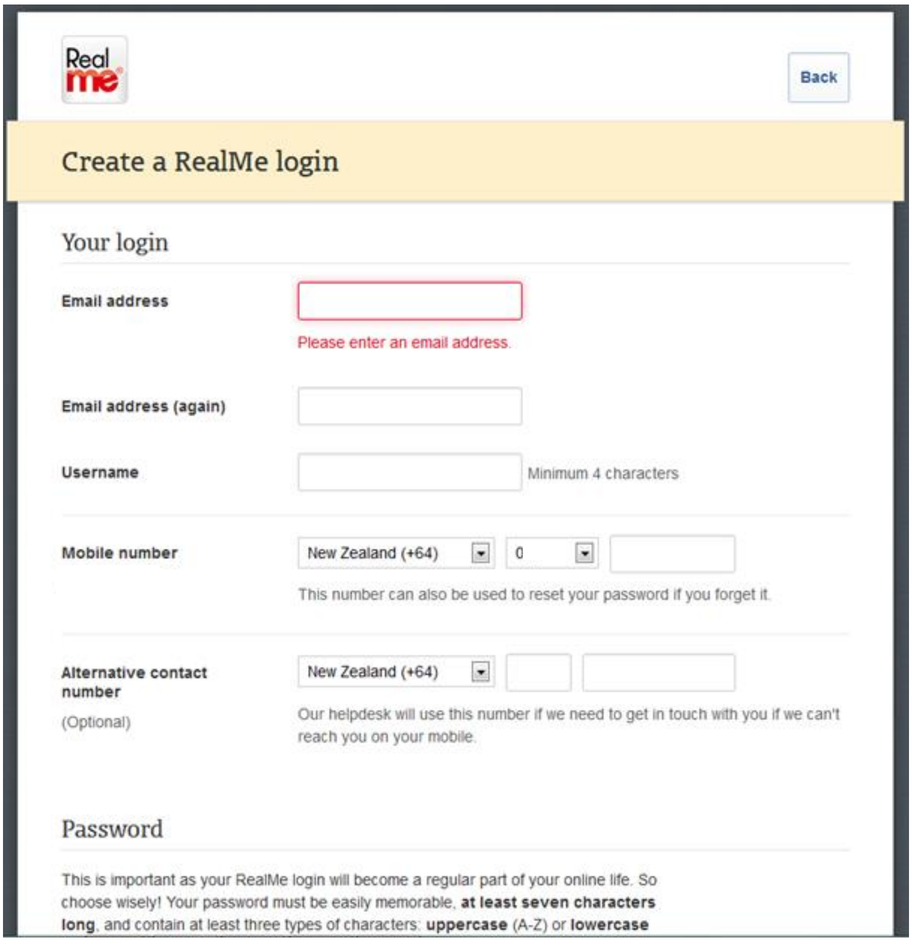
<table>
<tr><th>Description</th><th>Screenshot</th></tr>
<tr>
<td>

Step two

Follow the prompts to enter:

- 'Email address' – this will be the email address that is directly associated with your RealMe account
- 'Username' – this can be personalised, you will be prompted to change this if the username you enter is already in use
- 'Mobile number' – this is a mandatory field as it will be used as part of the 2-Factor authentication step completed each time you log in
- 'Alternative contact number'

</td>
<td>



</td>
</tr>
</table>

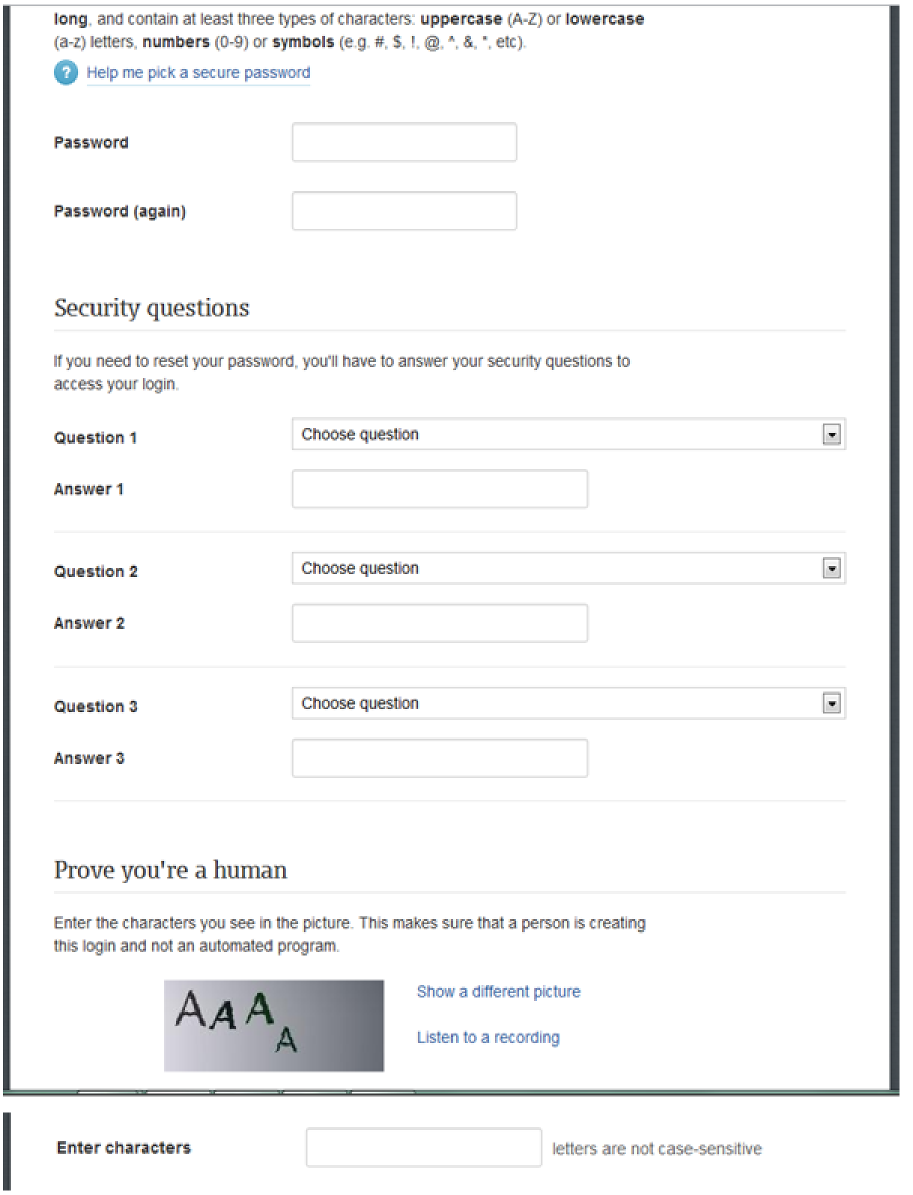
<table>
<tr><th>Description</th><th>Screenshot</th></tr>
<tr><td>

Step two, continued

Continue following the prompts to enter:

- password – guidelines are included
- security question details
- the characters shown in the picture

</td><td>



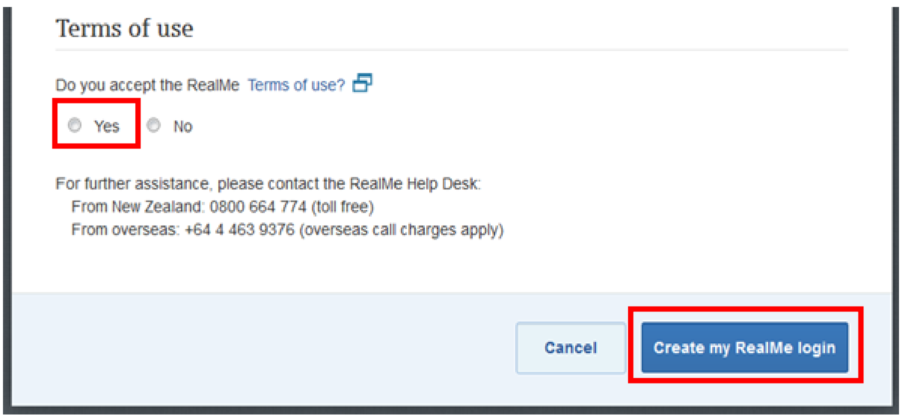
</td></tr>
<tr><td>

Step three

Accept the RealMe terms of use by selecting the 'Yes' radio button.

Once you have entered all of your information by answering each question, click 'Create my RealMe login'

</td><td>



</td></tr>
</table>

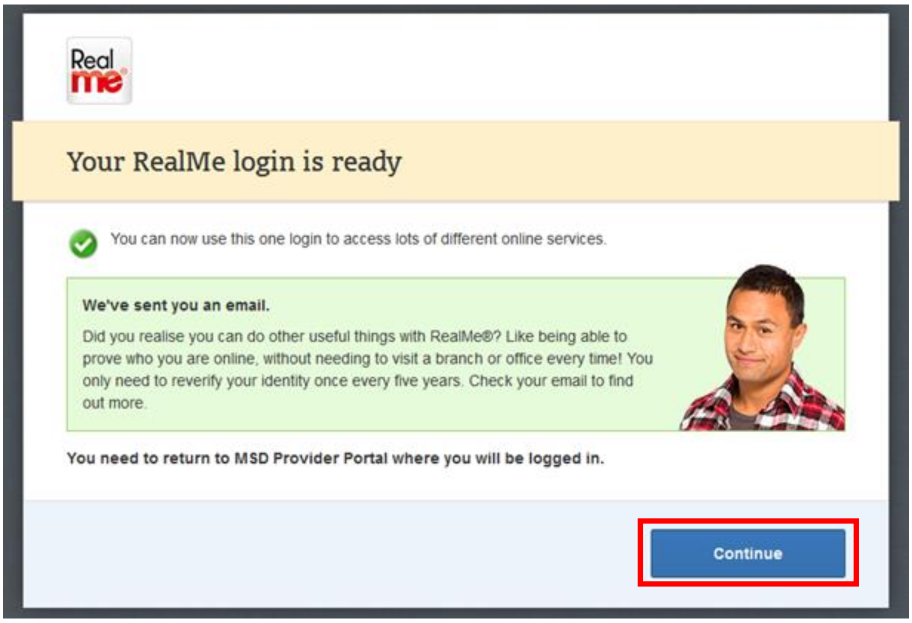
<table>
<tr><th>Description</th><th>Screenshot</th></tr>
<tr><td>

Confirmation

Once you have successfully created your RealMe account the following message will display

Select ‘Continue’ to return to Business Online Services (the the Ministry provider portal)

</td><td>



</td></tr>
</table>

Managing your RealMe account (including changing your password)

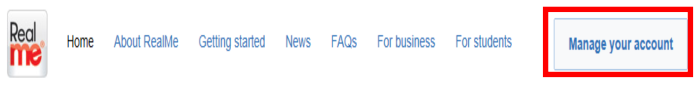
<table>
<tr><th>Description</th><th>Screenshot</th></tr>
<tr><td>

Step one

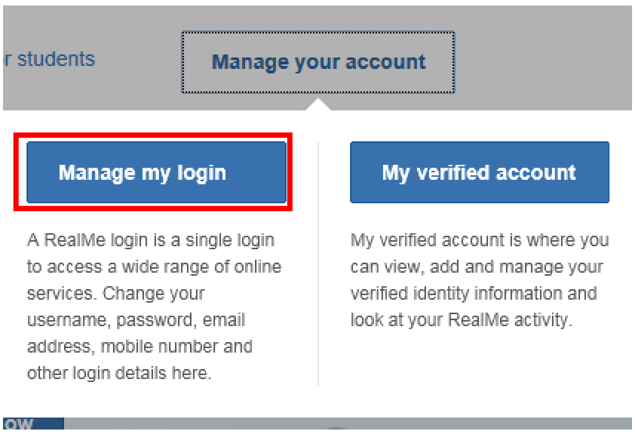
Go to the RealMe Manage My Login page by entering the following URL into the address bar of your browser: www.realme.govt.nz

Select ‘Manage your account’ and when the pop-up box displays select ‘Manage my login’

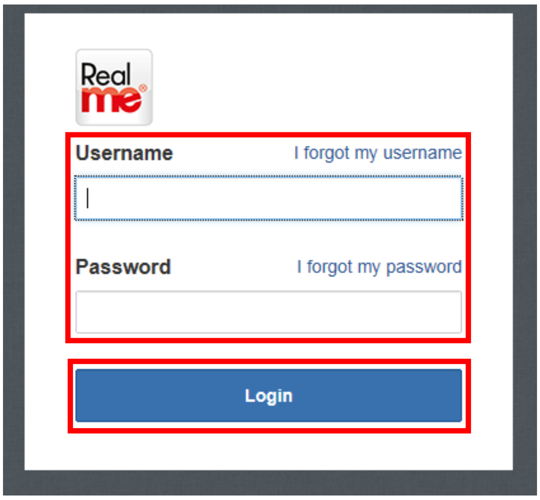
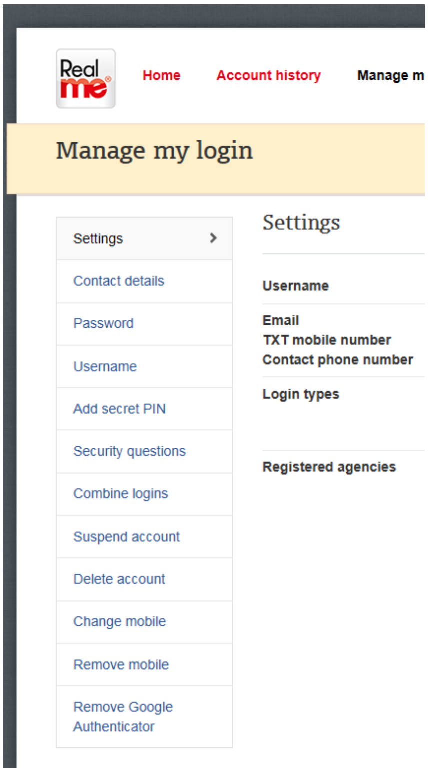
</td><td>



Pop-up box will display:



</td></tr>
</table>

Description	Screenshot
Step two Enter your username and password and select 'Login'	
Step three Use the menu options to manage your login	

Appendix B ~ Business Online Services Templates

We have provided you with some templates that you can use when contacting the Ministry via BOS. When contacting the CUH via email please ensure not to include any client details, these templates are only to be used in BOS.

Referrals

Change in circumstances identified

The following client has advised of a change in their circumstances during the referral process:

Client's name:
Client number:
Date of birth:
Contact number:
Details of the change in circumstances:
Comments:

General enquiry (manage referrals)

Client's name:
Client number:
Date of birth:
Contact number:
Enquiry:
Comments:

Request Financial Assistance

Client's name:
Client number:
Date of birth:

Contact number:

Rent in advance required ($):

Bond required ($):

Comments:

Tenancies

Change of Address *(property address has changed, e.g. from 5 Main Street to 5A Main Street, suburb boundary change etc)*

Client's name:

Client number:

Date of birth:

Reason for change:

Client Change

Client's name:

Client number:

Date of birth:

Contact number:

Type of change: [*select one; Personal or contact details, change to medical or disability information, absence from NZ, imprisonment, longer-term hospitalisation or residential care, death and changes to a specific client's risk*]

Details of the change:

Comments:

Death of a Sole Signatory

Reason for notification – Sole signatory deceased

Deceased signatory name:

Client number:

Address:

Date of change of circumstances:

Current tenancy reference:

Current household IRR amount:

Redirection in place: Yes/No

Notifier's name:

Notifier's contact details:

Confirmation of who is in the household:

General Enquiry

Client's name:

Date of birth:

Contact number:

Enquiry:

Comments:

Household Change

Client's name:

Date of birth:

Contact number:

Type of change*: [select one; Tenant or additional occupant has left the household, a person's role in the relationship has changed or risk information about the household needs to be updated]*

Details of the change:

Date of change:

Comments:

Household Change for a Domestic Violence Tenancy Order

A Tenancy Order has been granted by the Family Court for:

Name and Client number of respondent to the Tenancy Order:

Name and Client number of applicant of the Tenancy Order:

Details of any dependent children:

Date Tenancy Order actionable from:

Date applicant commenced as signatory:

New bond or rent in advance required:

Redirection payment reference:

Join-in Assessment

This is to confirm our conditional agreement to the join-in request made by the following tenant. Their prospective tenant's details are shown below.

Details of current tenant

Client's name:
Date of birth:
Client number:
Contact number:

Details of person (prospective tenant) who wants to sign the tenancy agreement

Full name:
Date of Birth:
Client number (if known):
Contact number:
Current Address:
Relationship to the tenant:

Please provide the below listed details for all other people conditionally approved as part of the Join-in request (e.g. partner, dependent children or other adults). If not applicable enter N/A.

Name:
Date of birth:

Lack of Notice Period

Subject: Lack of Notice Period given for an Increase in IRR
Hi Housing Unit,
Please resend notification with the correct notice period.
(Paste the original IRR Change notification)

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Provider Initiated Transfer

Tenant's name:
Client number:
Date of birth:
Contact number:
Tenancy reference:

Tenancy end date:

New tenancy address:

New tenancy reference:

New vacancy reference:

Transfer date:

Payment reference (if known):

Comments:

Provider to Provider Transfer

Approval has been sought from the Ministry to transfer tenant to another provider's property:

Tenant's name:
Client number:
Date of birth:
Contact number:
Tenancy reference:

Tenancy end date:

New tenancy address:

New tenancy reference:

Transfer date:

Payment reference (if known):

Comments:

Rent Redirection

Client name:

Rent amount per week:

Comments: Client is behind in rent. Please set up rent redirection

Rent Arrears Redirection

Client name:

Rent owed:

Rent redirection amount to be set-up per week/fortnight:

Risk *Please refer to 'Advise the Ministry of household risk and household member risk information' for examples*

Does the risk relate to a household **member**? If yes, who (name):

What is the household **member** risk information you would like to report:

Does the risk relate to a household (**premises**)? If yes, what is the risk:

Other Risk:

Transfer Assessment

Please confirm the housing requirements for the following tenant:

Tenant's name:

Client number:

Date of birth:

Contact number:

Comments: *(this may relate to the client's bedroom requirements or property modification needs)*

Appendix C ~ Social Housing matching rules

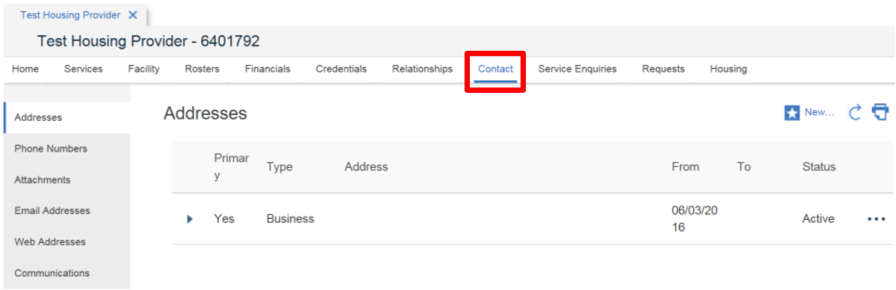
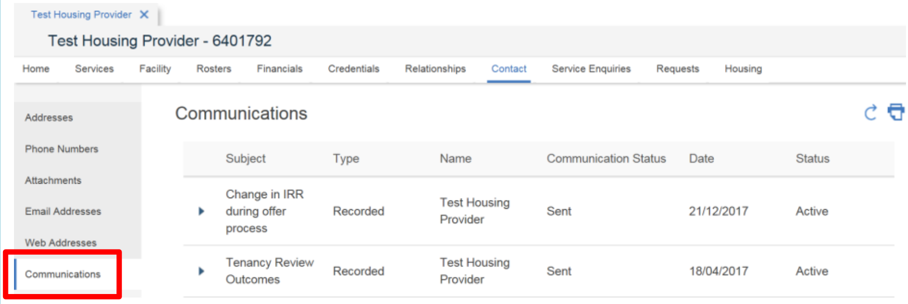
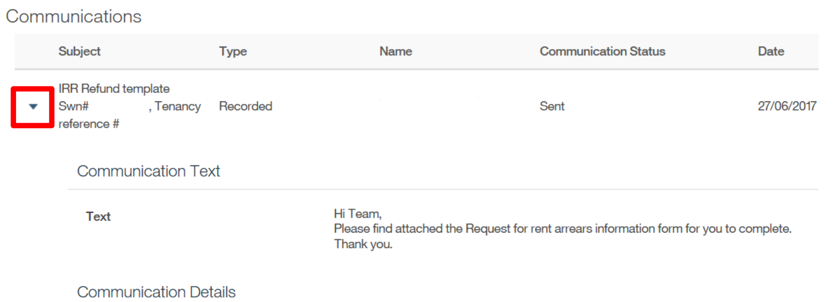
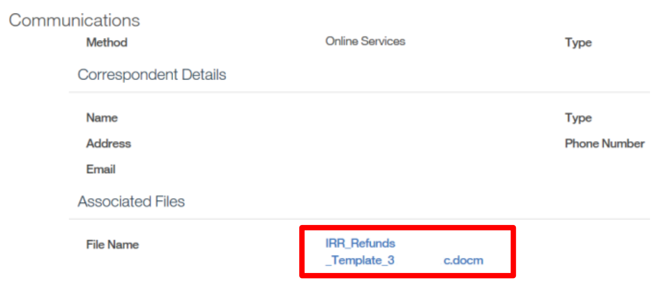
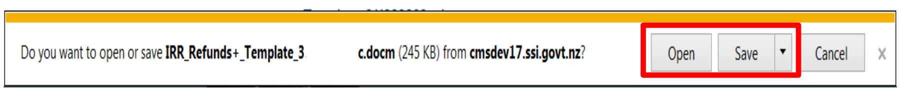
Social housing matching rules	
A social housing client will be matched to a property if:	
Letting area/locality	Is an exact match.
Bedroom requirements	Are a match, or there is one bedroom more, or one bedroom less.
Property modifications	If the property is not modifiable, clients requiring modifications will not be matched. If the property is modifiable, all clients will be matched. If the property is modified: • Clients requiring the exact modifications will be given first priority. • Clients requiring any modifications will be given second priority. • All other clients will be given third priority.
Wraparound Services	Will only match clients who have indicated that they are willing to be referred to a property which provides this support.
Mental Health / Intellectual Disability and Physical Disability Support	Will match clients who have a health condition in the specified category (mental health, physical disability, intellectual disability).
Gender	If the property is only suitable for a particular gender (e.g. supported or shared accommodation), only clients of that gender will be matched.
Not suitable for couple	Only single clients will be matched.
Not suitable for children	Only clients without children will be matched.
Minimum/Maximum age	Only clients meeting the age requirements will be matched (e.g. for elderly or youth accommodation).
Ethnicity	Only clients who have the selected ethnicity as one of their ethnicities will be matched.
Iwi	Only clients with the selected iwi as one of their iwi will be matched.

Appendix D ~ Reasons for declining or withdrawing an offer

Reasons for declining or withdrawing an offer	
Reasons for a **client declining** a provider's offer are:	Reasons for a **provider withdrawing** an offer to a client are:
• Bedroom is too small • Property history • Unsafe community • Property has stairs • Parking is inadequate • Does not meet disability needs • Distance from public transport • Unsafe physical environment • Poor interior condition • Poor exterior condition • House is too small • Section is too big • Not suitable for cultural reasons • Customer no longer requires housing • Access is poor • Busy road • Offer outside required lettable area • Distance from essential services • Fencing is not suitable • Other + Free text field • Unavailable for contact within 48 hours	• Customer no longer requires housing • Unable to contact client(s) • Property no longer available (e.g. fire damage) • Client(s) temporarily unable to accept the offer (e.g. medical, prison) • Client(s) not a good match to neighbourhood • Property not suitable for client(s) (e.g. mobility) • Property offered to another client(s) • Created in error • Incorrect property description • Not on register • Property no longer available – Cleansing order P-House • Other + Free text field

MINISTRY OF SOCIAL DEVELOPMENT
TE MANATŪ WHAKAHIATO ORA

Appendix E ~ Downloading documents sent by the Ministry

Description	Screenshot
Step one Log in to BOS and navigate to the 'Contact' tab from within 'My Details'	
Step two Select the 'Communications' tab	
Step three Select the triangle which will expand the notification	
Step four Select the Hyperlink with the document name	
Step five Click either Save or Open on the below	

Appendix F ~ Join-In Assessment Process