



MINISTRY OF HOUSING  
AND URBAN DEVELOPMENT



MINISTRY OF SOCIAL  
DEVELOPMENT  
TE MANATŪ WHAKAHIATO ORA

## Business Online Services User Guide

*for Community Housing Providers*



Release date: November 2018

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# Introduction to Business Online Services

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Business Online Services (BOS) was introduced in 2016 as an application to communicate between the Community Housing Provider (CHP) and the Ministry of Social Development (MSD). BOS balances the efficient sharing of data protecting the privacy of public housing applicants and tenants. Due to the establishment of the new Ministry of Housing and Urban Development (HUD) from 1st of October, BOS will be used to exchange client, property and tenancy information between a CHP, MSD and HUD.

As part of the process of being a contracted CHP, HUD will be responsible for recording details of Income-Related Rent Subsidy (IRRS) contract agreements and granting the initial organisational access required for the use of BOS from 1st of October.

HUD will manage vacancy and market rent approvals, IRRS contracts and payments for CHPs.

MSD will continue to manage housing applications, calculate the IRR (including debt and refund) and respond to client, tenant and BOS related queries.

## 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. The tabs and screens are:

- Home tab – displays details about you that have been entered by HUD staff. You can only change the 'Known As' name.
- Services tab – lists the contracted services your organisation provides to MSD and HUD.
- Credentials tab – the Categories screen displays the categories for the service(s) that your organisation provides to MSD and HUD.
- Relationships tab:








- MSD Staff – lists HUD staff members.
  - Provider Members – ADMINISTRATOR ONLY use this screen to create and view your users for BOS.
- Contact tab – the screens on this tab are used to maintain your postal address, phone number, email address, etc. Documents can be uploaded and downloaded under this tab too. Refer to Appendix E and F. The following documents should be uploaded under this tab:
  - Annual Market Rent Review Template
  - Exemption for Sitting Tenant Request Form
  - Market Rent Report
  - Provider Initiated Transfer Approval Request Form
- Requests – FINANCIAL ADMINISTRATOR ONLY use the screens on this tab to view and submit service invoice requests and associated property schedules. You will use the attachments screen to upload your IRRS tax invoice and property schedule.
- Housing – the screens on this tab are used 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:

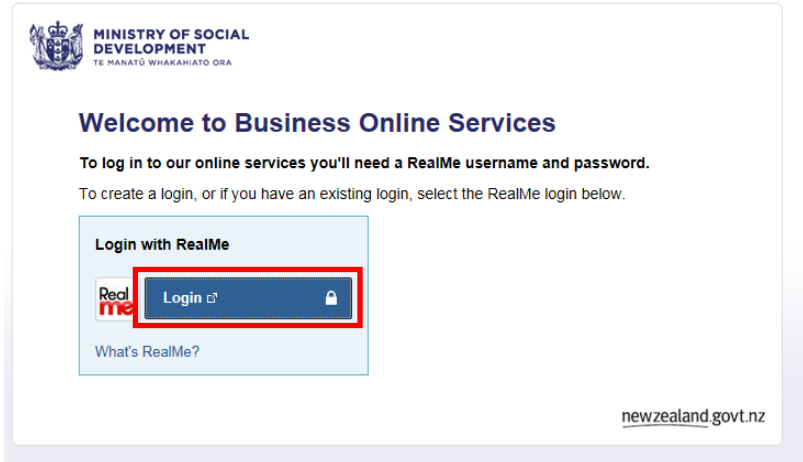
- Display Action Menu 
- Search 
- Date Picker 

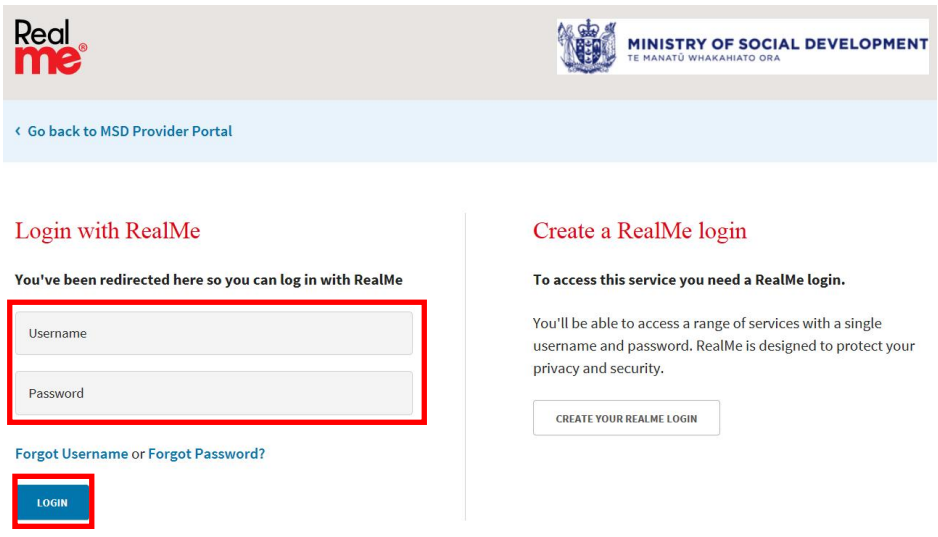

# Part 1: Accessing Business Online Services

## Logging into BOS

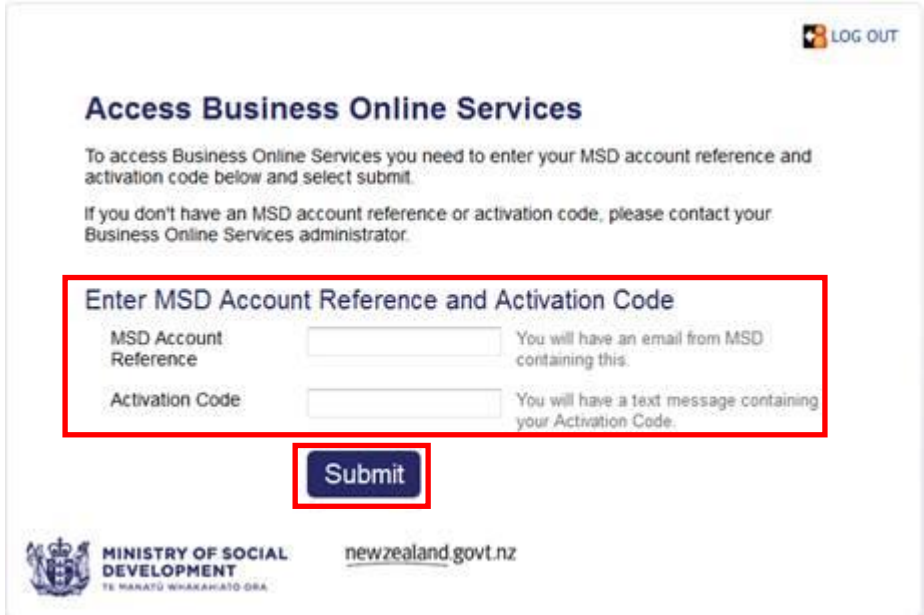
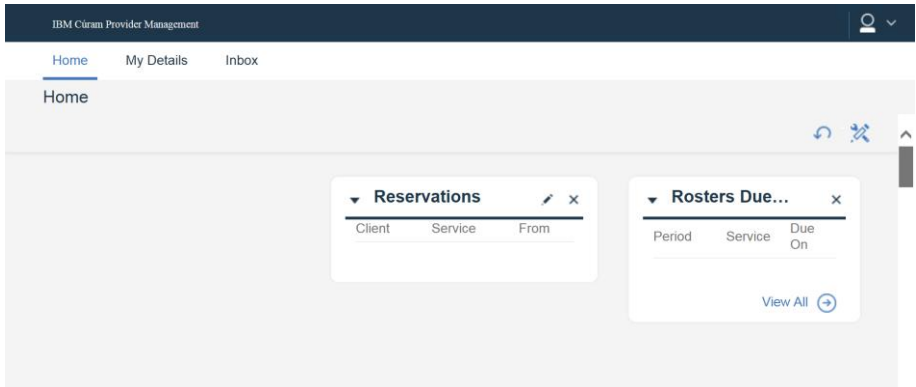
### Note:

- 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 in Appendix A.

Description	Screenshot
<b>Step one</b> Launch BOS by entering the following URL into your internet browser	<b>Production environment:</b> <a href="https://businessonlineservices.msd.govt.nz/bos/MSDProviderLogon.jsp">https://businessonlineservices.msd.govt.nz/bos/MSDProviderLogon.jsp</a>
<b>Step two</b> Click the RealMe Login button <b>Note:</b> This is not required when logging into the 'training' environment	

Description	Screenshot
<p><b>Step three</b></p> <p>Enter your username and password and select 'Login'</p>	
<p><b>Step four</b></p> <p>Enter the six digit RealMe code you receive via text message and select 'Continue'</p>	



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



## Unauthorised access screen messages

- If you see the below 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.

Home My Details Inbox

Test Housing Provider X

Test Housing Provider - 6401792

Home Services Facility Rosters Financials Credentials Relationships Contact Service Enquiries Requests Housing

Accreditations

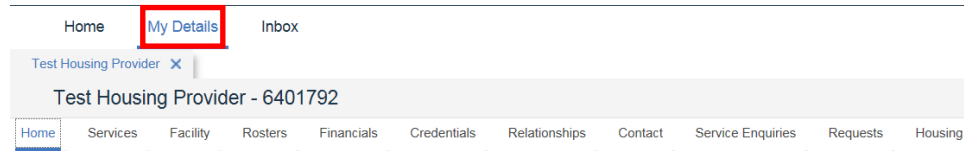
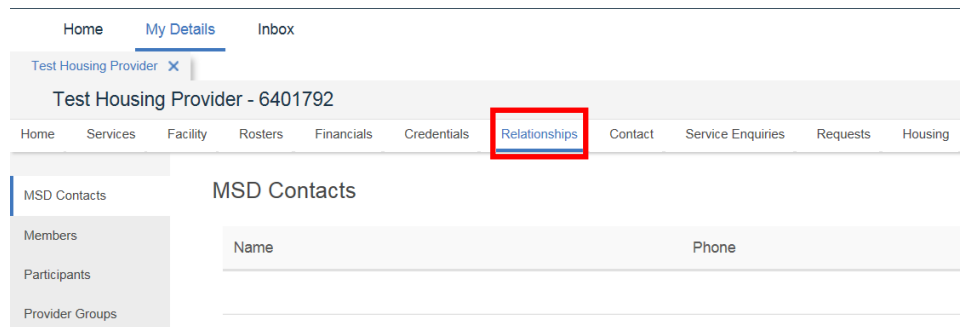
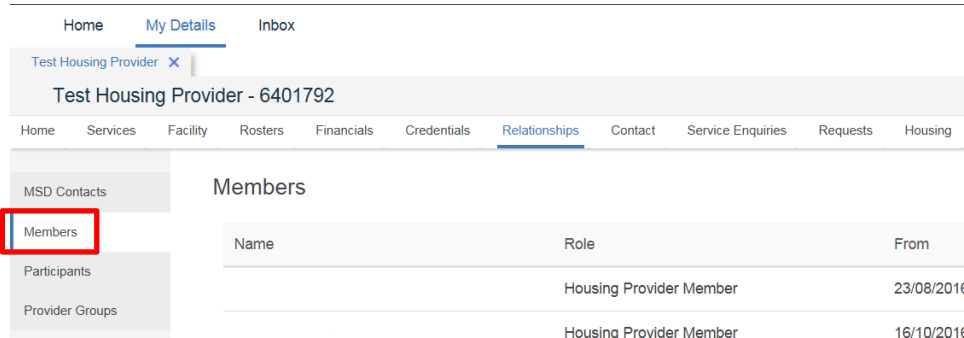
Categories

Licenses

### An Application Error Has Occurred

! ERROR: You do not have sufficient privileges to view this page.

## Viewing your own user account details

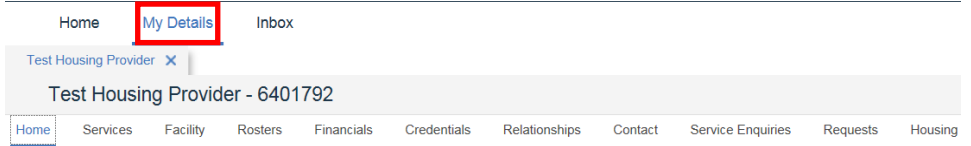
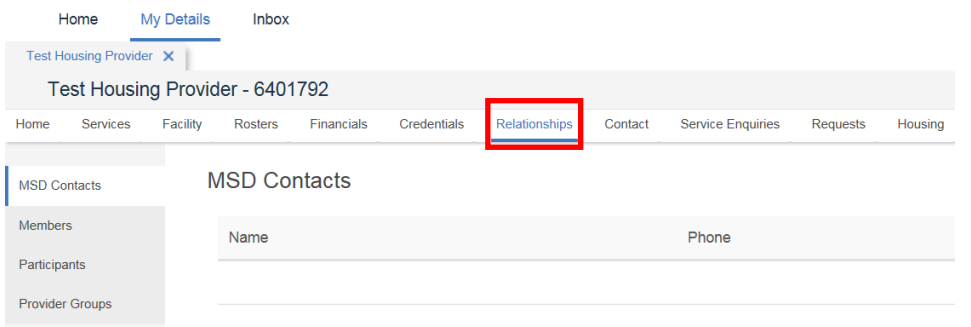
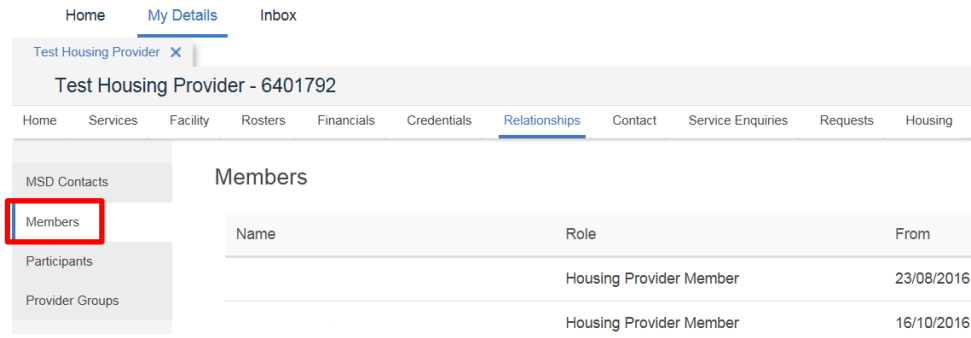
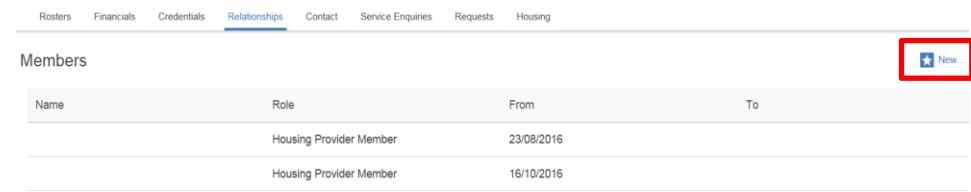
Description	Screenshot									
<b>Step one</b> Log into BOS and select 'My Details'	 <p>The screenshot shows the BOS interface. At the top, there are three tabs: 'Home', 'My Details' (highlighted with a red box), and 'Inbox'. Below the tabs, there is a search bar with 'Test Housing Provider' and a dropdown arrow. Below the search bar, there is a header for 'Test Housing Provider - 6401792'. Below the header, there is a navigation menu with the following items: 'Home', 'Services', 'Facility', 'Rosters', 'Financials', 'Credentials', 'Relationships', 'Contact', 'Service Enquiries', 'Requests', and 'Housing'.</p>									
<b>Step two</b> Select the 'Relationships' tab	 <p>The screenshot shows the BOS interface. At the top, there are three tabs: 'Home', 'My Details', and 'Inbox'. Below the tabs, there is a search bar with 'Test Housing Provider' and a dropdown arrow. Below the search bar, there is a header for 'Test Housing Provider - 6401792'. Below the header, there is a navigation menu with the following items: 'Home', 'Services', 'Facility', 'Rosters', 'Financials', 'Credentials', 'Relationships' (highlighted with a red box), 'Contact', 'Service Enquiries', 'Requests', and 'Housing'. Below the navigation menu, there is a sidebar with the following items: 'MSD Contacts', 'Members', 'Participants', and 'Provider Groups'. The main content area is titled 'MSD Contacts' and contains a table with the following columns: 'Name' and 'Phone'.</p>									
<b>Step three</b> Select 'Members' from the menu on the left	 <p>The screenshot shows the BOS interface. At the top, there are three tabs: 'Home', 'My Details', and 'Inbox'. Below the tabs, there is a search bar with 'Test Housing Provider' and a dropdown arrow. Below the search bar, there is a header for 'Test Housing Provider - 6401792'. Below the header, there is a navigation menu with the following items: 'Home', 'Services', 'Facility', 'Rosters', 'Financials', 'Credentials', 'Relationships', 'Contact', 'Service Enquiries', 'Requests', and 'Housing'. Below the navigation menu, there is a sidebar with the following items: 'MSD Contacts', 'Members' (highlighted with a red box), 'Participants', and 'Provider Groups'. The main content area is titled 'Members' and contains a table with the following columns: 'Name', 'Role', and 'From'.</p> <table><thead><tr><th>Name</th><th>Role</th><th>From</th></tr></thead><tbody><tr><td></td><td>Housing Provider Member</td><td>23/08/2016</td></tr><tr><td></td><td>Housing Provider Member</td><td>16/10/2016</td></tr></tbody></table>	Name	Role	From		Housing Provider Member	23/08/2016		Housing Provider Member	16/10/2016
Name	Role	From								
	Housing Provider Member	23/08/2016								
	Housing Provider Member	16/10/2016								



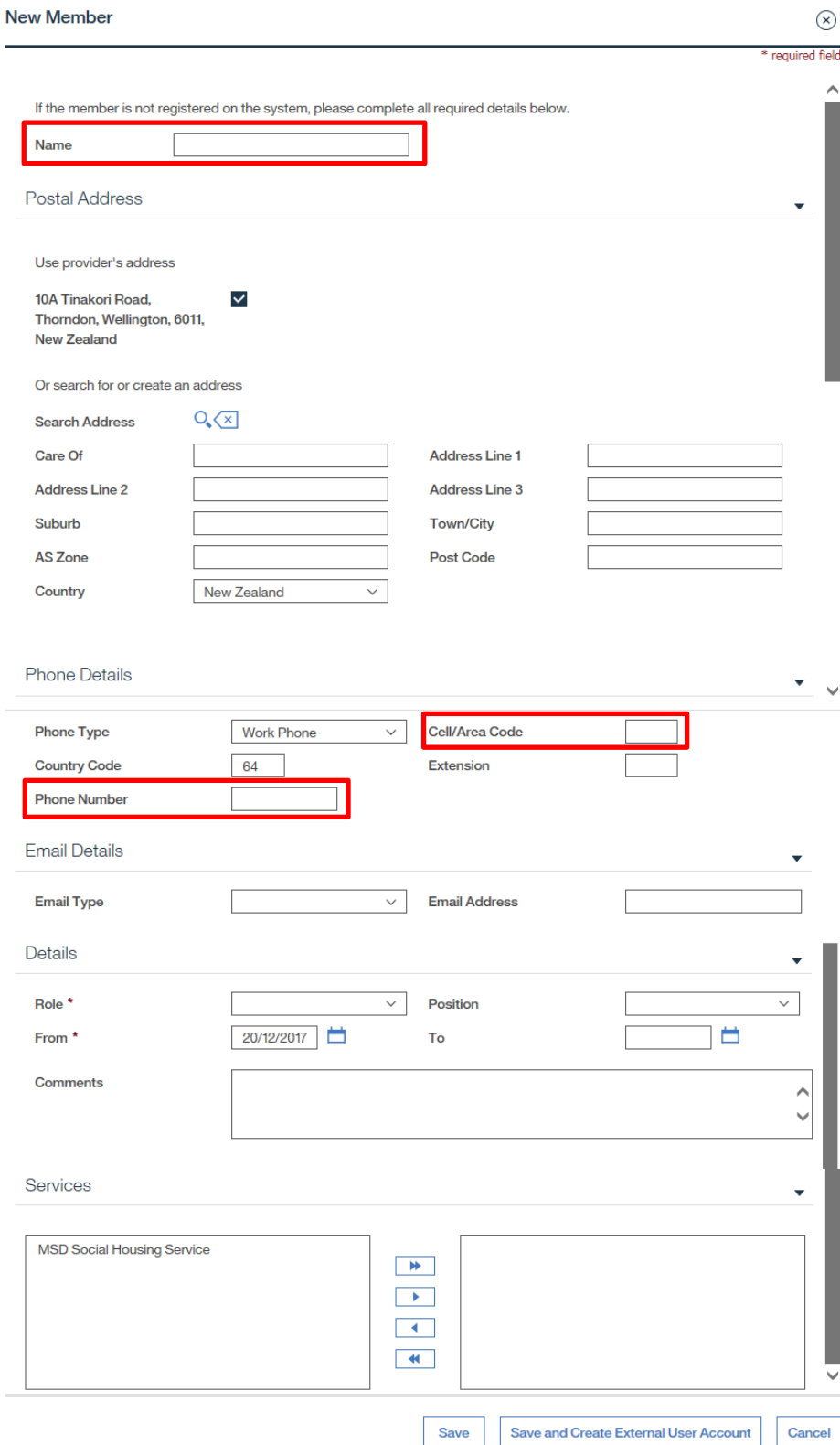
Description	Screenshot												
<h3>Step four</h3> <p>Select your name:</p> <ul style="list-style-type: none"><li>• The ‘Contact’ tab contains all your contact details e.g. postal address, phone number, email address</li><li>• The Administration tab contains your user account details and can only be viewed by an Administrator</li></ul>	<div><div><div>HomeMy DetailsInbox</div><div>Test Housing Provider XJoe Bloggs X</div><div>Joe Bloggs</div><div>HomeContactAdministration</div><div>Addresses</div><div>Phone Numbers</div><div>Email Addresses</div><div>Web Addresses</div><div>Addresses</div><table><thead><tr><th>Primary</th><th>Type</th><th>Address</th></tr></thead><tbody><tr><td>▶ Yes</td><td>Business</td><td>10A Tinakori Road, Thorndon, Wellington, 6011, New Zealand</td></tr></tbody></table></div></div> <div><div><div>HomeMy DetailsInbox</div><div>Test Housing Provider XJoe Bloggs X</div><div>Joe Bloggs</div><div>HomeContactAdministration</div><div>External User Accounts</div><table><thead><tr><th>User Name</th><th>Account Type</th><th>Status</th></tr></thead><tbody><tr><td>▶</td><td>Housing Financial Administrator</td><td>Active</td></tr></tbody></table></div></div>	Primary	Type	Address	▶ Yes	Business	10A Tinakori Road, Thorndon, Wellington, 6011, New Zealand	User Name	Account Type	Status	▶	Housing Financial Administrator	Active
Primary	Type	Address											
▶ Yes	Business	10A Tinakori Road, Thorndon, Wellington, 6011, New Zealand											
User Name	Account Type	Status											
▶	Housing Financial Administrator	Active											

## Creating a new user account – ADMINISTRATOR ONLY

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

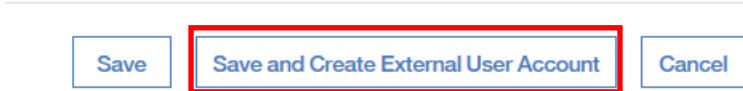
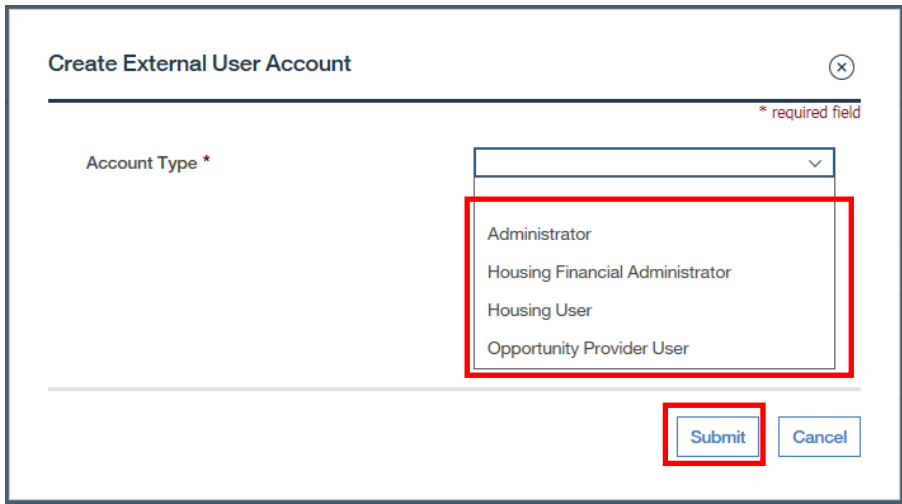
Description	Screenshot
<b>Step one</b> Log into BOS and select 'My Details'	
<b>Step two</b> Select the 'Relationships' tab	
<b>Step three</b> Select 'Members' from the menu on the left	
<b>Step four</b> Select 'New' from the 'Members' tab	



Description	Screenshot
<p><b>Step five</b></p> <p>Enter the mandatory details – Name, phone number and email address</p> <p>The phone type must be set to cell phone number</p> <p>The phone number must be entered as follows:</p> <ul style="list-style-type: none"><li>• ‘Area Code’ must contain the cell phone network number e.g. 021 / 027 etc</li><li>• Enter the remainder of the number into the ‘Phone Number’ field</li></ul>	





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

**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:

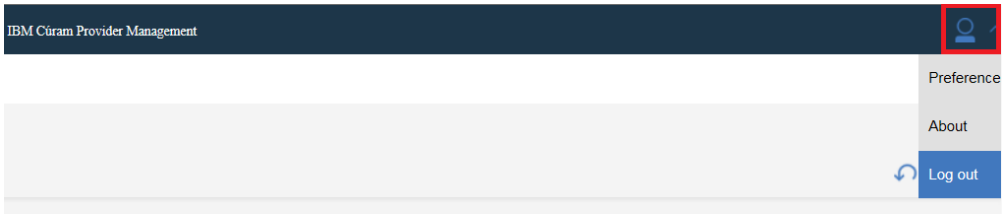
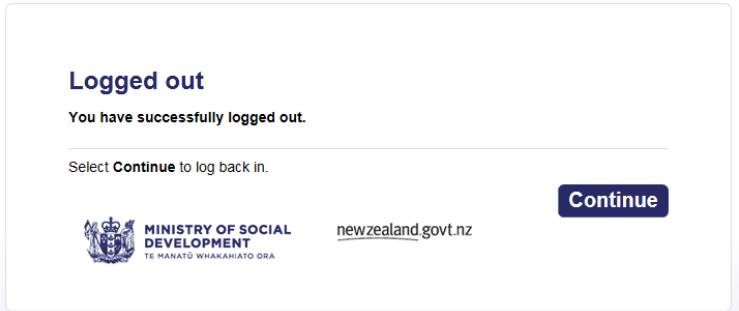
Description	Screenshot
<b>Step one</b> Select the 'Relationships' tab	
<b>Step two</b> Select 'Members' from the menu on the left	
<b>Step three</b> Select the user's name	



Description	Screenshot
<p><b>Step four</b></p> <p>Select the 'Contact' tab</p>	
<p><b>Step five</b></p> <p>Select the item from the menu on the left that you need to update e.g.</p> <ul style="list-style-type: none"> <li>• Addresses</li> <li>• Phone Numbers</li> <li>• Email Addresses</li> <li>• Web Addresses</li> </ul>	
<p><b>Step six</b></p> <p>Select 'Edit' from the action menu for the address / number on the list</p>	
<p><b>Step seven</b></p> <p>Update details and select 'Save'</p>	

## Logging out of Business Online Services

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

Description	Screenshot
<b>Step one</b> 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.

### Session ended

**Your session has ended due to inactivity.**

Select **Continue** to log back in.

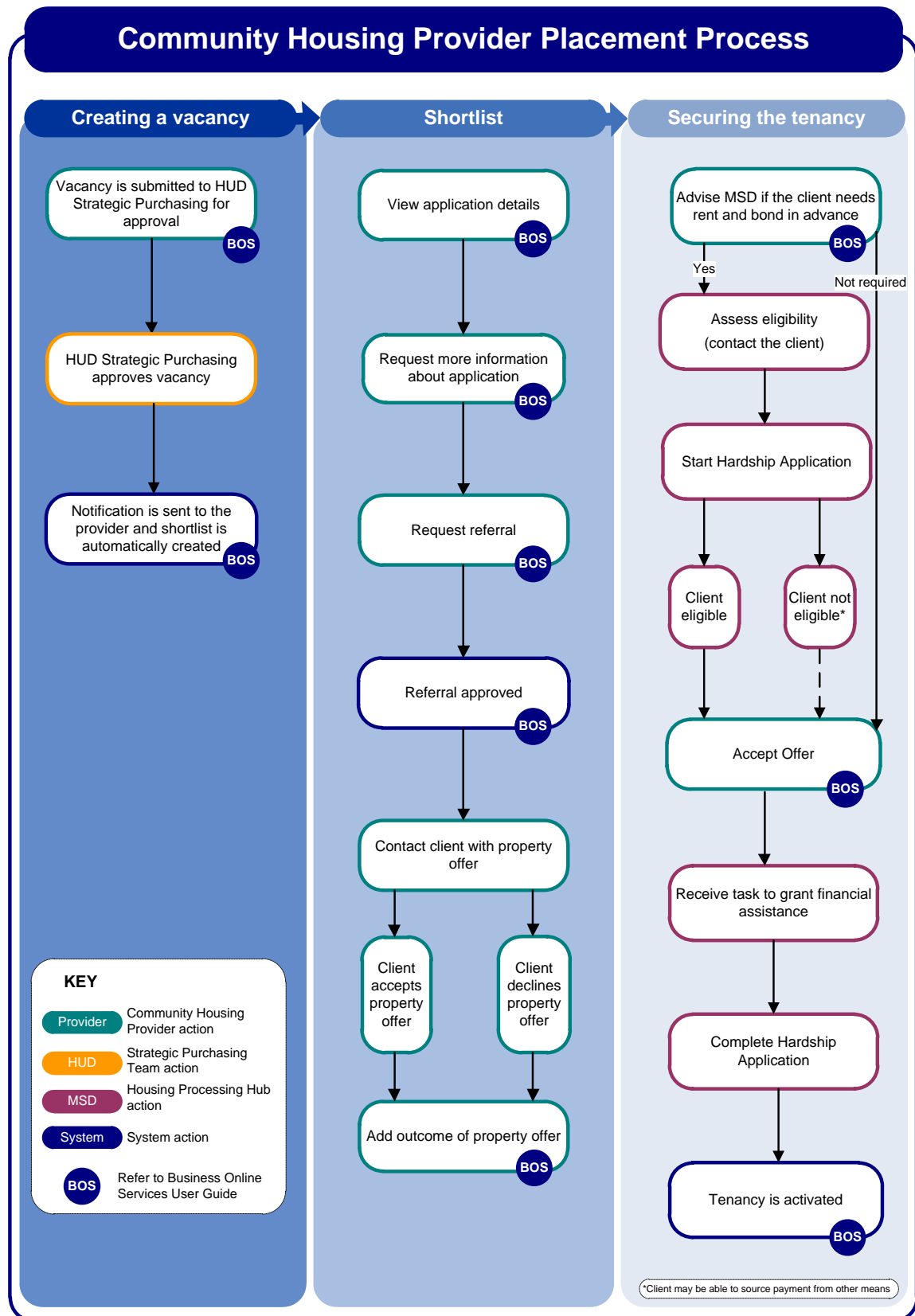


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**Continue**

## Part 2: Vacancy Management

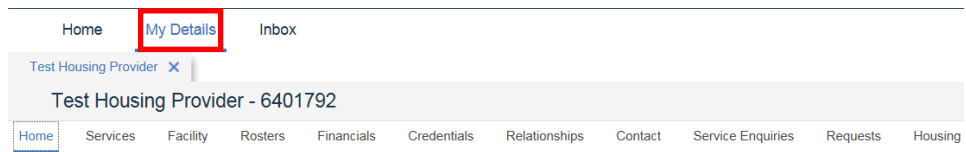
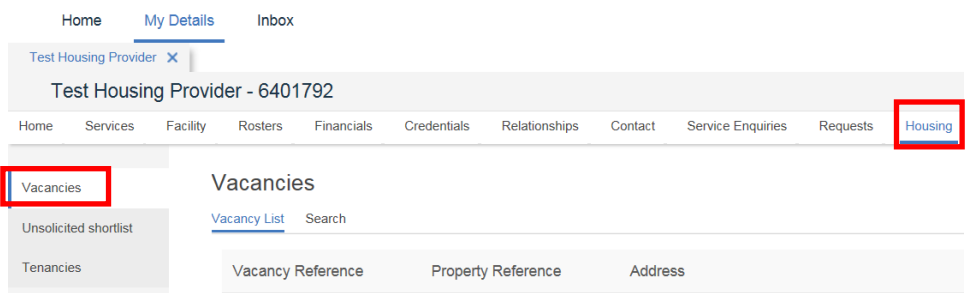
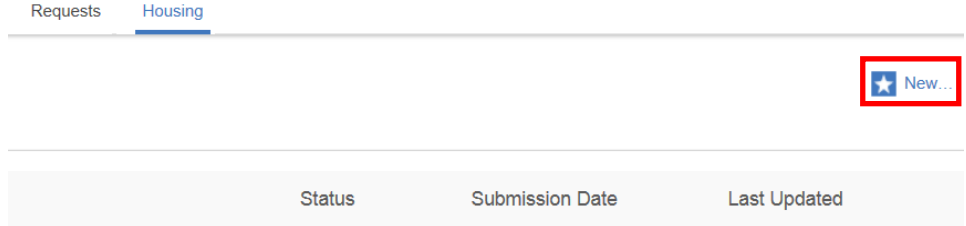


## Submit a property vacancy

Once you have a property available, submit a vacancy request for approval in order to receive a shortlist of applicants. As part of the vacancy request, you can specify suitable tenant characteristics that will be included in the shortlist generated by the system. HUD 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 Public Housing matching rules.

To create a property vacancy:

Description	Screenshot
<b>Step one</b> Log into BOS and select 'My Details'	
<b>Step two</b> Select the 'Housing' tab and then 'Vacancies' from the left-hand side menu	
<b>Step three</b> Select 'New' from the 'Vacancy List' screen	



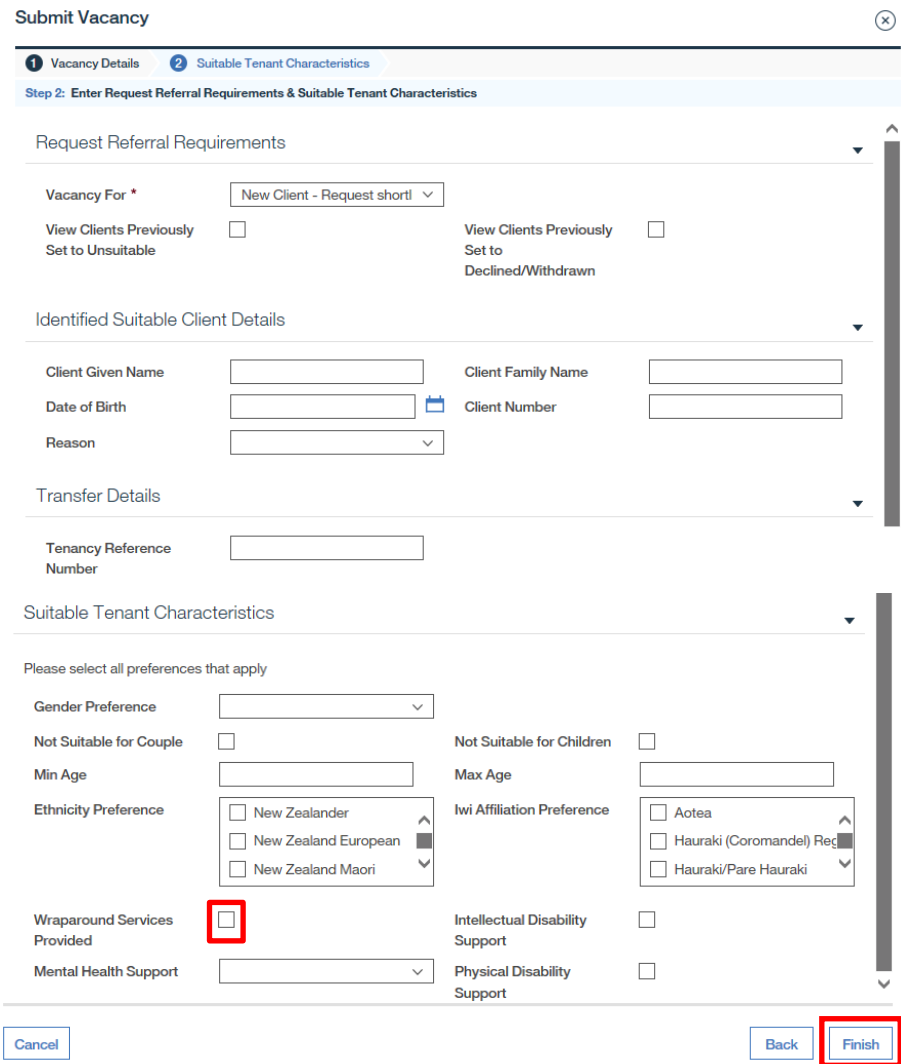


Description	Screenshot
<p><b>Step four</b></p> <p>Fill in the vacancy details then select 'Next'</p> <p><b>Note:</b> The same unique property reference number must be used each time the property is listed in BOS</p> <p>If any of the mandatory fields are left blank, error messages will display at the top of the 'Submit Vacancy' screen. Otherwise the 'Suitable Tenant Characteristics' screen displays</p> <p>All property details will need to be provided in each vacancy request, e.g. efficient heating sources, insulation, year built</p> <p>Vacancy address details must be searched using the magnifying glass</p>	



Description	Screenshot								
<p>Ensure to type the full address in the Address Line 1</p> <p>If the address you are searching for is not already in the system you need to select 'Create New'</p> <p>Matching is based on post codes so post code accuracy is critical. Post codes can be found using the following website:</p> <p><a href="https://www.nzpost.co.nz/tools/address-postcode-finder">https://www.nzpost.co.nz/tools/address-postcode-finder</a></p>	<p>The screenshot displays the 'Address Search' interface. It includes a search form with fields for 'Address Line 1' (containing '56 the terrace'), 'Address Line 2', 'Town/City' (Wellington (W)), 'Suburb' (Wellington Ce), and 'Country' (New Zealand). A red box highlights the 'Search' button. Below the form, the 'Search Results (Number of Items: 3)' are shown in a table:</p> <table><thead><tr><th>Action</th><th>Address</th></tr></thead><tbody><tr><td><a href="#">Select</a></td><td>Floor G, 56 The Terrace, Wellington Central, Wellington, 6011, New Zealand</td></tr><tr><td><a href="#">Select</a></td><td>56 The Terrace, Wellington Central, Wellington, 6011, New Zealand</td></tr><tr><td><a href="#">Create New</a></td><td>56 the terrace, Wellington Central, Wellington, 6011, New Zealand</td></tr></tbody></table> <p>A red box highlights the 'Select' button for the second result. A 'Cancel' button is located at the bottom right of the interface.</p>	Action	Address	<a href="#">Select</a>	Floor G, 56 The Terrace, Wellington Central, Wellington, 6011, New Zealand	<a href="#">Select</a>	56 The Terrace, Wellington Central, Wellington, 6011, New Zealand	<a href="#">Create New</a>	56 the terrace, Wellington Central, Wellington, 6011, New Zealand
Action	Address								
<a href="#">Select</a>	Floor G, 56 The Terrace, Wellington Central, Wellington, 6011, New Zealand								
<a href="#">Select</a>	56 The Terrace, Wellington Central, Wellington, 6011, New Zealand								
<a href="#">Create New</a>	56 the terrace, Wellington Central, Wellington, 6011, New Zealand								



Description	Screenshot
<p><b>Step five</b></p> <p>Fill in the 'Suitable Tenant Characteristics' then select 'Finish'</p> <p><b>Note:</b> The more criteria you enter in the 'Suitable Tenant Characteristics', the fewer results you will receive in your shortlist</p> <p>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</p> <p>If the 'Wraparound Services Provided' box is ticked clients who <b>only</b> want housing with a supervisor will be selected</p>	 <p>The screenshot shows the 'Submit Vacancy' form with two tabs: '1 Vacancy Details' and '2 Suitable Tenant Characteristics'. The second tab is active, showing 'Step 2: Enter Request Referral Requirements &amp; Suitable Tenant Characteristics'. The form is divided into several sections: 'Request Referral Requirements' with a dropdown for 'Vacancy For' (set to 'New Client - Request shortl') and checkboxes for 'View Clients Previously Set to Unsuitable' and 'View Clients Previously Set to Declined/Withdrawn'; 'Identified Suitable Client Details' with input fields for 'Client Given Name', 'Date of Birth', 'Reason', 'Client Family Name', and 'Client Number'; 'Transfer Details' with a 'Tenancy Reference Number' field; and 'Suitable Tenant Characteristics' with a prompt to 'Please select all preferences that apply'. This section includes checkboxes for 'Gender Preference', 'Not Suitable for Couple', 'Min Age', 'Ethnicity Preference' (with a list: New Zealander, New Zealand European, New Zealand Maori), 'Iwi Affiliation Preference' (with a list: Aotea, Hauraki (Coromandel) Reg, Hauraki/Pare Hauraki), 'Wraparound Services Provided' (highlighted with a red box), 'Intellectual Disability Support', 'Mental Health Support', and 'Physical Disability Support'. At the bottom, there are 'Cancel', 'Back', and 'Finish' (highlighted with a red box) buttons.</p>



Description	Screenshot																								
<h3>Step six</h3> <p>You will see the vacancy status is 'Submitted' on the 'Vacancy List' screen</p> <p>If you have an administrator role, you will receive a notification when the approval process is complete – see the Notifications processes</p>	<div><div><div><div>Home</div><div>My Details</div><div>Inbox</div></div><div>Test Housing Provider</div><div>Test Housing Provider - 6401792</div><div>HomeServicesFacilityRostersFinancialsCredentialsRelationshipsContactService EnquiriesRequestsHousing</div><div><div>Vacancies</div><div>Unsolicited shortlist</div><div>Tenancies</div></div><div><div>Vacancies</div><div>The Vacancy 41728 has been queued for manual approval.</div><div><div>Vacancy List</div><div>Search</div></div><table><thead><tr><th>Vacancy Reference</th><th>Property Reference</th><th>Address</th><th>Status</th><th>Submission Date</th><th>Last Updated</th></tr></thead><tbody><tr><td>41728</td><td></td><td></td><td>Submitted</td><td>10/01/2018 14:51</td><td>10/01/2018 14:51</td></tr></tbody></table></div></div></div> <div><div><div>Home</div><div>My Details</div><div>Inbox</div></div><div>Test Housing Provider</div><div>Test Housing Provider - 6401792</div><div>HomeServicesFacilityRostersFinancialsCredentialsRelationshipsContactService EnquiriesRequestsHousing</div><div><div>Vacancies</div><div>Unsolicited shortlist</div><div>Tenancies</div></div><div><div>Vacancies</div><div></div><div><div>Vacancy List</div><div>Search</div></div><table><thead><tr><th>Vacancy Reference</th><th>Property Reference</th><th>Address</th><th>Status</th></tr></thead><tbody><tr><td>7</td><td></td><td>New Zealand</td><td>Approved</td></tr><tr><td>0</td><td></td><td>Auckland, New Zealand</td><td>Approved</td></tr></tbody></table></div></div>	Vacancy Reference	Property Reference	Address	Status	Submission Date	Last Updated	41728			Submitted	10/01/2018 14:51	10/01/2018 14:51	Vacancy Reference	Property Reference	Address	Status	7		New Zealand	Approved	0		Auckland, New Zealand	Approved
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0		Auckland, New Zealand	Approved																						

## Vacancy details captured (\* indicates a mandatory field)

- A property reference - this is a unique identifier for each property. It **cannot** be edited or amended so ensure it is accurate, relevant. If you have previously listed this property, you must use the same reference number
- 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)\*
- Warm and dry features (e.g. insulation, double glazing, efficient heating sources)
  - Refer to MBIE for regulatory advice: <https://www.mbie.govt.nz/info-services/housing-property/tenancy/residential-tenancies-regulations-insulation-smoke-alarms>
- 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



## Vacancy details captured (\* indicates a mandatory field)

- |  |  |
|--|--|
| <ul style="list-style-type: none"> <li>• Address*</li> <li>• Year built</li> </ul> | <ul style="list-style-type: none"> <li>• Nearby amenities</li> <li>• Additional information (free text field)</li> </ul> |
|--|--|

## 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 either their client number or their name, date of birth and a reason for specifying the client.
- If the vacancy is for a transfer (within your own stock), you must supply the tenancy reference of the existing tenancy and create a provider initiated transfer task using the BOS template to advise HUD 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 of the new tenancy and the primary provider must create a provider initiated transfer task using the BOS template to advise HUD 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)
  - 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).



## Vacancy details captured (\* indicates a mandatory field)

**Note: The 'Not Suitable for Couple' field**

### Suitable Tenant Characteristics

Please select all preferences that apply

Gender Preference

Not Suitable for Couple ☐

Not Suitable for Children ☐

Min Age

Max Age

Ethnicity Preference  
☐ New Zealander  
☐ New Zealand European  
☐ New Zealand Maori

Iwi Affiliation Preference  
☐ Aotea  
☐ Hauraki (Coromandel) Reg  
☐ Hauraki/Pare Hauraki

Wraparound Services  
Provided ☐

Intellectual Disability  
Support ☐

Mental Health Support

Physical Disability  
Support ☐

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.



## View the shortlist for a vacancy

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

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

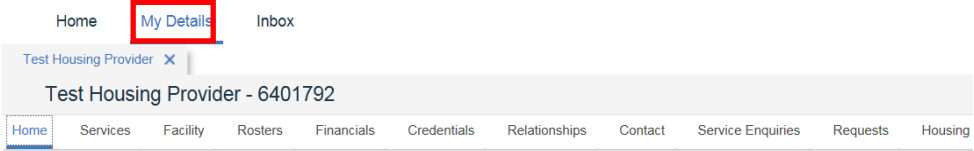
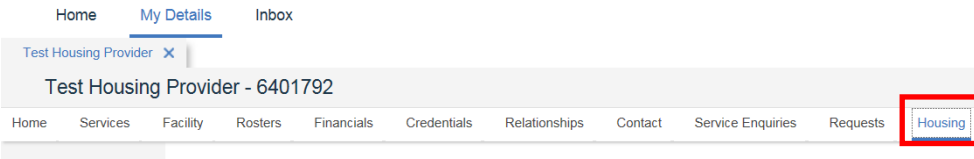
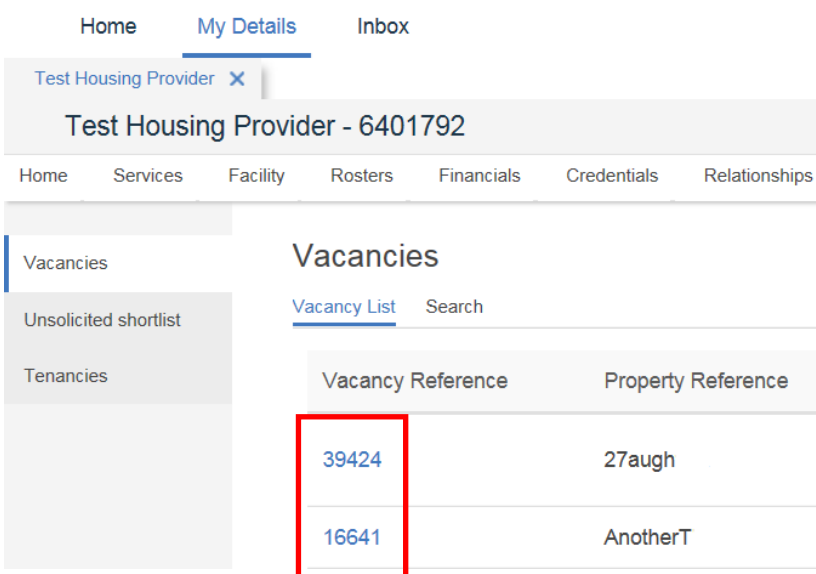
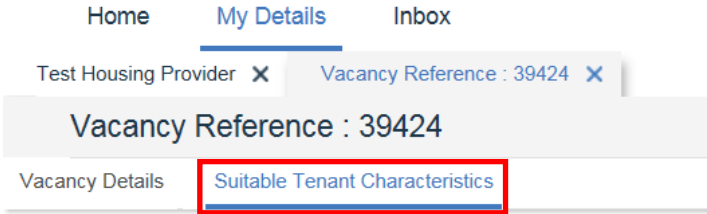
You may also receive additional information relating to the following:

- 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” – if you receive this message, you must first check the information provided in its original vacancy notice. If no matches found, contact MSD at [GNL\\_Provider\\_Support@msd.govt.nz](mailto:GNL_Provider_Support@msd.govt.nz).

To view the shortlist:

Description	Screenshot
<b>Step one</b> Log into BOS and select 'My Details'	
<b>Step two</b> Select the 'Housing' tab	
<b>Step three</b> From the 'Vacancies' menu select the 'Vacancy Reference' link	
<b>Step four</b> Select the 'Suitable Tenant Characteristics' tab	



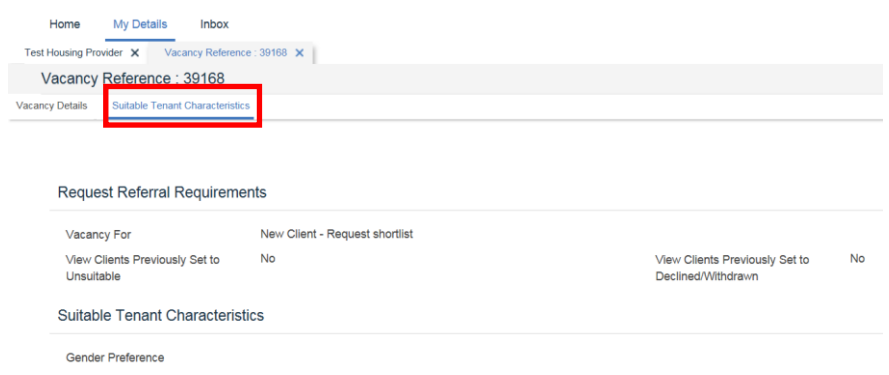
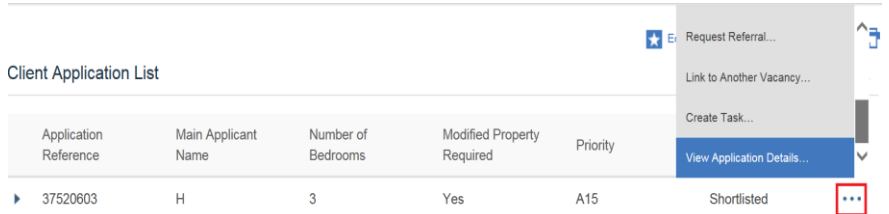
Description	Screenshot																														
<b>Step five</b>  Your shortlist will be displayed under the ‘Client Application List’	<p>Client Application List</p> <table><tr><th>Application Reference</th><th>Main Applicant Name</th><th>Number of Bedrooms</th><th>Modified Property Required</th><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>	Application Reference	Main Applicant Name	Number of Bedrooms	Modified Property Required	Priority	Status	▶ 37520603	H	3	Yes	A15	Shortlisted	▶ 20340085	A	3	Yes	A11	Shortlisted	▶ 37458443	I	3	Yes	B10	Shortlisted	▶ 40891389	J	3	Yes	B0	Shortlisted
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<b>Step six</b>  The identified suitable client list, if there is one, will display under ‘Identified Suitable Client’	<p>Identified Suitable Client</p> <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>	Application Reference	Main Applicant Name	Number of Bedrooms	Modified Property Required	Priority	Status	Reason suitable	▶ 36232582	A	3	Yes	A0F	Shortlisted	Client Already in Service ...																
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▶ 36232582	A	3	Yes	A0F	Shortlisted	Client Already in Service ...																									



## 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												
<p><b>Step one</b></p> <p>Navigate to the 'Suitable Tenant Characteristics' tab for the vacancy</p>	 <p>The screenshot shows the 'Vacancy Reference : 39168' page. The 'Suitable Tenant Characteristics' tab is highlighted with a red box. Below the tabs, there is a section for 'Request Referral Requirements' and a section for 'Suitable Tenant Characteristics' with a 'Gender Preference' field.</p>												
<p><b>Step two</b></p> <p>Select 'View Application Details' from the action menu for the application on the client list</p>	 <p>The screenshot shows the 'Client Application List' table. The table has columns: Application Reference, Main Applicant Name, Number of Bedrooms, Modified Property Required, Priority, and Status. The first row is highlighted, and the 'View Application Details...' option in the action menu is highlighted with a red box.</p> <table><thead><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></thead><tbody><tr><td>37520603</td><td>H</td><td>3</td><td>Yes</td><td>A15</td><td>Shortlisted</td></tr></tbody></table>	Application Reference	Main Applicant Name	Number of Bedrooms	Modified Property Required	Priority	Status	37520603	H	3	Yes	A15	Shortlisted
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37520603	H	3	Yes	A15	Shortlisted								



Description	Screenshot																																																						
<div>Step three</div> <div>Select 'Close' when finished viewing</div>	<div><div>View Application Details</div><div><div>Application Details</div><div><div>PriorityA15Application TypeNew</div><div>StatusShortlistedCurrent Housing Provider</div><div>Fast Track ReasonApplication Reference37520603</div><div>Bedrooms Required3</div></div><div>Bedrooms Required Comments</div><div>Fast Track Comments</div></div><div><div>Preferred Localities</div><table><thead><tr><th>Region</th><th>City</th><th>Suburb</th><th>Comments</th></tr></thead><tbody><tr><td>Wellington</td><td>Upper Hutt</td><td>Trentham</td><td>closer to Timberley side</td></tr><tr><td>Wellington</td><td>Wellington</td><td>Tawa</td><td>Linden included</td></tr><tr><td>Wellington</td><td>Wellington</td><td></td><td>Anywhere in Wellington</td></tr><tr><td>Greater Auckland</td><td>Auckland</td><td></td><td></td></tr><tr><td>Wellington</td><td>Wellington</td><td>Island Bay</td><td></td></tr></tbody></table></div><div><div>Household Members</div><table><thead><tr><th>Client Name</th><th>Unit</th><th>Role</th><th>Special Cautions</th><th>Risk</th><th>Medical</th></tr></thead><tbody><tr><td>T</td><td>1</td><td>Child</td><td></td><td></td><td></td></tr><tr><td>J</td><td>1</td><td>Additional Occupant - Carer or support person</td><td></td><td></td><td>Yes</td></tr><tr><td>H</td><td>1</td><td>Applicant</td><td></td><td></td><td></td></tr></tbody></table></div><div><div>Application Characteristics</div><table><thead><tr><th>Ethnicities</th><th>Iwi Affiliations</th></tr></thead><tbody><tr><td>Chinese</td><td></td></tr><tr><td>Samoan</td><td></td></tr></tbody></table></div></div> <div>Close</div>	Region	City	Suburb	Comments	Wellington	Upper Hutt	Trentham	closer to Timberley side	Wellington	Wellington	Tawa	Linden included	Wellington	Wellington		Anywhere in Wellington	Greater Auckland	Auckland			Wellington	Wellington	Island Bay		Client Name	Unit	Role	Special Cautions	Risk	Medical	T	1	Child				J	1	Additional Occupant - Carer or support person			Yes	H	1	Applicant				Ethnicities	Iwi Affiliations	Chinese		Samoan	
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Ethnicities	Iwi Affiliations																																																						
Chinese																																																							
Samoan																																																							



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

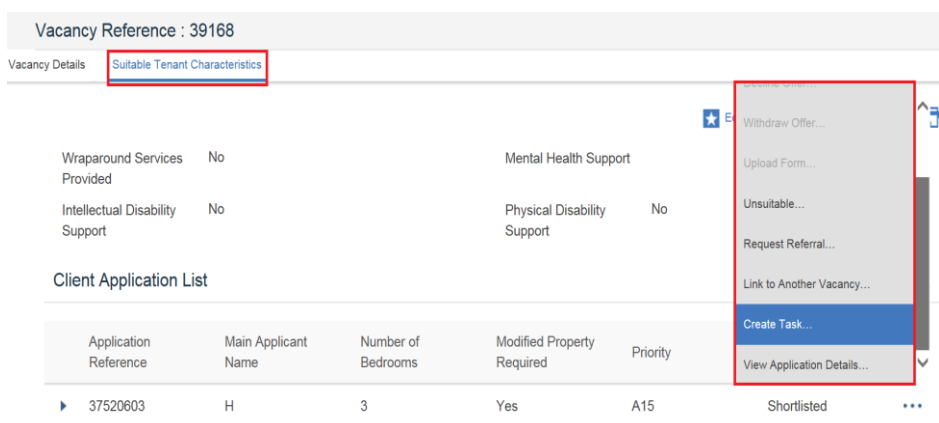
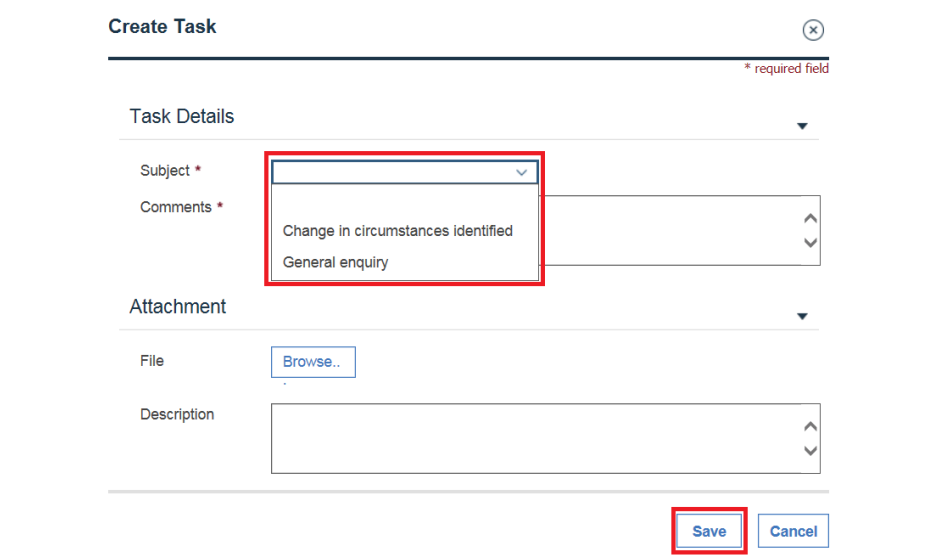
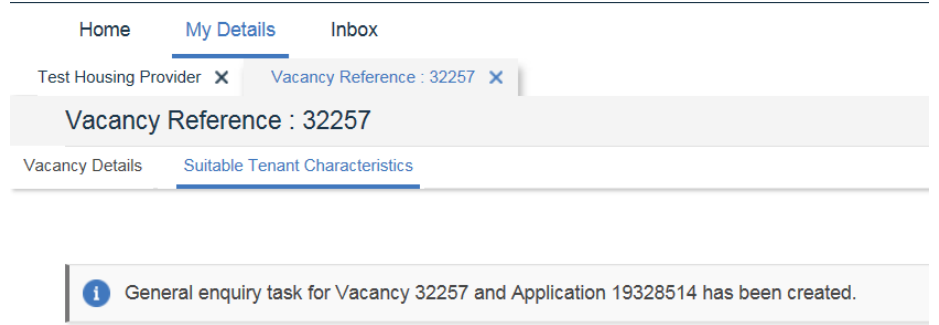
- number of bedrooms required and comments regarding any additional bedroom requirements
- preferred location
- access required
- ethnicity
- iwi
- whether an interpreter is needed
- language
- hearing impairment
- visual impairment
- health and disability conditions
- housing modification required
- 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 during 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, information that is automatically provided may be incomplete or insufficient for you to determine if the application may be an appropriate match.

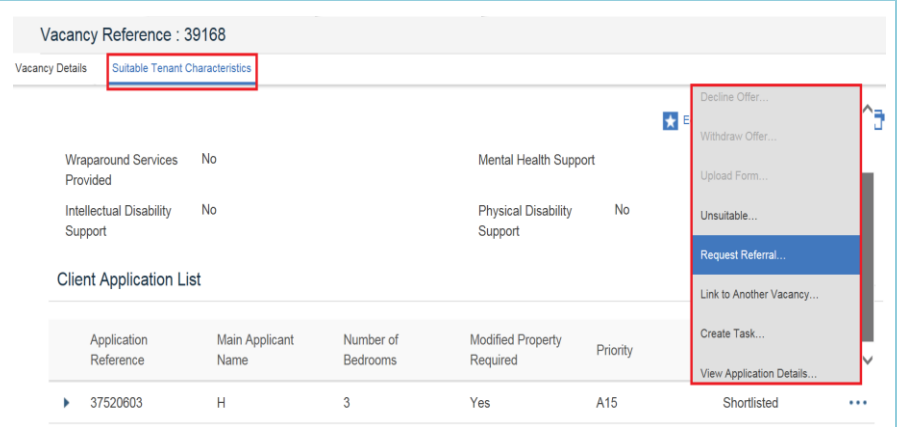
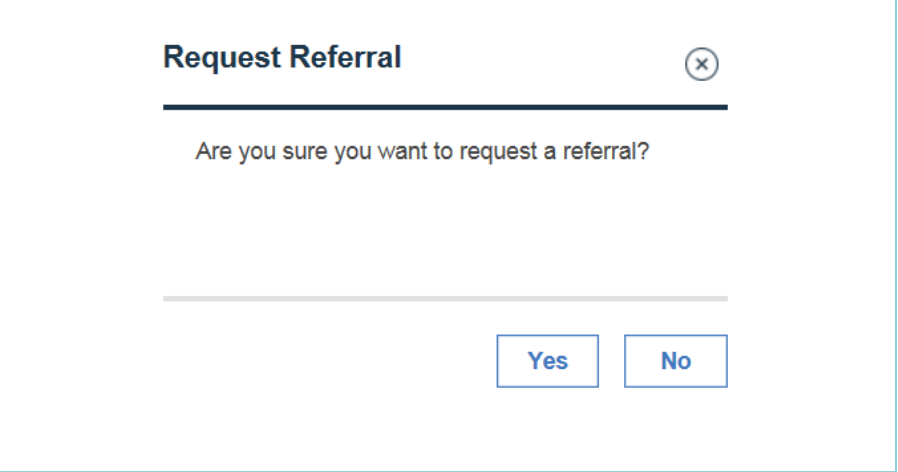
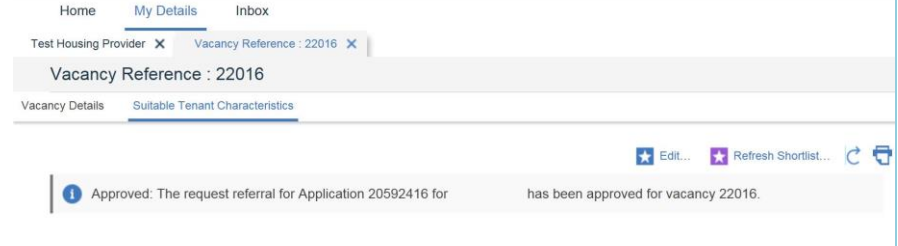
To request more information that MSD may hold:

Description	Screenshot												
<p><b>Step one</b></p> <p>Navigate to the 'Suitable Tenant Characteristics' tab for the vacancy</p> <p><b>Select 'Create a Task'</b> from the action menu for the application on the client list</p>	 <p>Vacancy Reference : 39168</p> <p>Vacancy Details <b>Suitable Tenant Characteristics</b></p> <p>Wraparound Services Provided No Mental Health Support</p> <p>Intellectual Disability Support No Physical Disability Support No</p> <p>Client Application List</p> <table><thead><tr><th>Application Reference</th><th>Main Applicant Name</th><th>Number of Bedrooms</th><th>Modified Property Required</th><th>Priority</th><th></th></tr></thead><tbody><tr><td>▶ 37520603</td><td>H</td><td>3</td><td>Yes</td><td>A15</td><td>Shortlisted ...</td></tr></tbody></table>	Application Reference	Main Applicant Name	Number of Bedrooms	Modified Property Required	Priority		▶ 37520603	H	3	Yes	A15	Shortlisted ...
Application Reference	Main Applicant Name	Number of Bedrooms	Modified Property Required	Priority									
▶ 37520603	H	3	Yes	A15	Shortlisted ...								
<p><b>Step two</b></p> <p>Select 'General Enquiry' as the subject from the drop-down box</p> <p>Enter comments, attach a file as supporting information if required and select 'Save'</p>	 <p><b>Create Task</b> (X)</p> <p>* required field</p> <p>Task Details</p> <p>Subject * <b>General enquiry</b></p> <p>Comments *</p> <p>Attachment</p> <p>File <b>Browse..</b></p> <p>Description</p> <p><b>Save</b> Cancel</p>												
<p>The following message will display when this is completed</p>	 <p>Home <b>My Details</b> Inbox</p> <p>Test Housing Provider X Vacancy Reference : 32257 X</p> <p>Vacancy Reference : 32257</p> <p>Vacancy Details <b>Suitable Tenant Characteristics</b></p> <p>General enquiry task for Vacancy 32257 and Application 19328514 has been created.</p>												

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



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 housing 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.

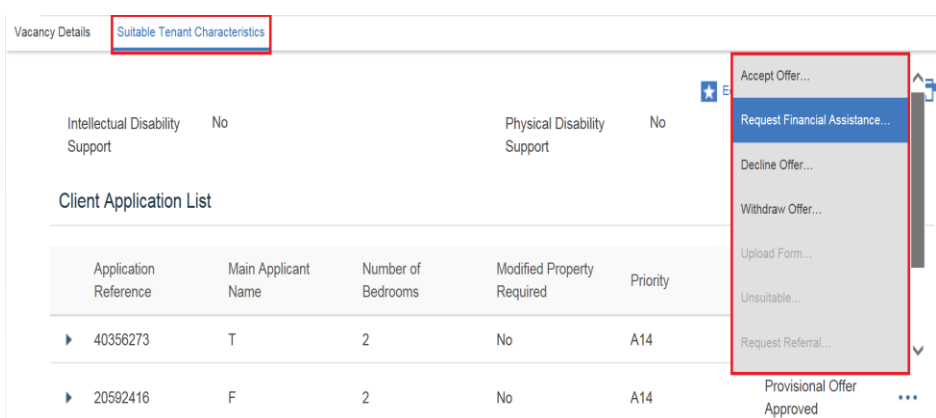
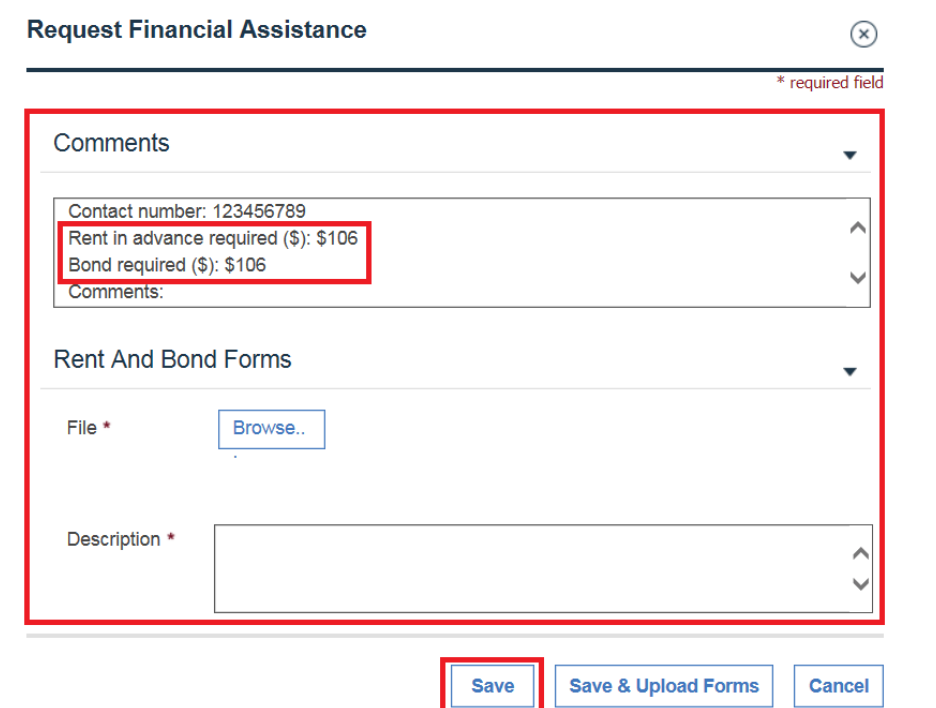
For example this will occur when requesting a referral when there is a Child Sex Offender included in the application. Once the referral is requested, the Housing Processing Hub (HPH) at MSD will receive a task. HPH will contact the Department of Corrections and seek approval on behalf of you. Corrections will then make a decision on the referral and let the HPH know. The HPH will manually approve or decline the referral depending on the response from Corrections and email you advising the outcome. This will trigger a notification that will allow you to follow up.

**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.

## Advise MSD 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 MSD:

Description	Screenshot															
<p><b>Step one</b></p> <p>Navigate to the 'Suitable Tenant Characteristics' tab for the vacancy</p> <p>Select 'Request Financial Assistance' from the action menu for the application</p>	 <p>The screenshot shows the 'Vacancy Details' page with the 'Suitable Tenant Characteristics' tab selected. Below the tab, there are sections for 'Intellectual Disability Support' and 'Physical Disability Support', both marked 'No'. A 'Client Application List' table is displayed with two applications. The 'Request Financial Assistance' option is highlighted in the action menu for the first application.</p> <table><tr><th>Application Reference</th><th>Main Applicant Name</th><th>Number of Bedrooms</th><th>Modified Property Required</th><th>Priority</th></tr><tr><td>▶ 40356273</td><td>T</td><td>2</td><td>No</td><td>A14</td></tr><tr><td>▶ 20592416</td><td>F</td><td>2</td><td>No</td><td>A14</td></tr></table>	Application Reference	Main Applicant Name	Number of Bedrooms	Modified Property Required	Priority	▶ 40356273	T	2	No	A14	▶ 20592416	F	2	No	A14
Application Reference	Main Applicant Name	Number of Bedrooms	Modified Property Required	Priority												
▶ 40356273	T	2	No	A14												
▶ 20592416	F	2	No	A14												
<p><b>Step two</b></p> <p>You will need to use the template Request Financial Assistance found in Appendix B</p> <p><b>Ensure that you specify the rent and bond amount required</b></p> <p>Attach a file, enter the description for the file and select 'Save'</p> <p><b>Note:</b> 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</p>	 <p>The screenshot shows the 'Request Financial Assistance' form. The 'Comments' section is highlighted, showing 'Contact number: 123456789', 'Rent in advance required (\$): \$106', and 'Bond required (\$): \$106'. The 'Rent And Bond Forms' section is also highlighted, showing a 'File' field with a 'Browse..' button and a 'Description' field. The 'Save' button is highlighted at the bottom.</p> <p><b>Note:</b> 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.</p>															



Description	Screenshot
<p>Once you have completed this step:</p> <ul style="list-style-type: none"><li>• MSD processing staff will receive a task to contact the client and test eligibility</li><li>• The hardship application is completed once you have selected 'Accept Offer'</li><li>• MSD 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 MSD will send a message within 24 hours.</li></ul>	

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

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 MSD)

## Advise MSD that a tenancy agreement has been signed

If you offer the property vacancy to applicants, and they accept the offer, you must inform MSD 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 MSD 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															
<p><b>Step one</b></p> <p>Navigate to the ‘Suitable Tenant Characteristics’ tab for the vacancy</p> <p>Select ‘Accept Offer’ from the action menu for an application on the client list</p>	<div><div>Vacancy Details</div><div>Suitable Tenant Characteristics</div><div><div>Intellectual Disability SupportNoPhysical Disability SupportNo</div><div>Client Application List</div><table><thead><tr><th>Application Reference</th><th>Main Applicant Name</th><th>Number of Bedrooms</th><th>Modified Property Required</th><th>Priority</th></tr></thead><tbody><tr><td>▶ 40356273</td><td>T</td><td>2</td><td>No</td><td>A14</td></tr><tr><td>▶ 20592416</td><td>F</td><td>2</td><td>No</td><td>A14</td></tr></tbody></table><div><div>Accept Offer...Request Financial Assistance...Decline Offer...Withdraw Offer...Upload Form...Unsuitable...Request Referral...Provisional Offer Approved</div></div></div></div>	Application Reference	Main Applicant Name	Number of Bedrooms	Modified Property Required	Priority	▶ 40356273	T	2	No	A14	▶ 20592416	F	2	No	A14
Application Reference	Main Applicant Name	Number of Bedrooms	Modified Property Required	Priority												
▶ 40356273	T	2	No	A14												
▶ 20592416	F	2	No	A14												



Description	Screenshot
<p><b>Step two</b></p> <p>Fill in the tenancy agreement details including (*denotes mandatory fields):</p> <ul style="list-style-type: none"><li>• 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)*</li><li>• Tenancy start date*</li><li>• Rent charge date (the day of the week that the rent is paid)</li><li>• Rent effective date</li><li>• Rent redirection start date</li><li>• <b>Rent redirection payment reference</b> (a field for you to enter your own reference for redirected benefit payments)</li><li>• Confirm Household Members – you must tick everyone who will live in the household</li></ul> <p>Select 'Yes'</p> <p><b>Note:</b> If there are any error messages – the 'Accept Referral Offer' screen redisplayes with the error messages at the top of the screen</p>	<p><b>Accept Referral Offer</b></p> <p>* required field</p> <p>Tenancy Reference * 123456 Tenancy Start Date * 01/01/2018</p> <p>Rent Charge Date Rent Effective Date</p> <p>Rent Redirection Start Date Rent Redirection Payment Reference 18307847</p> <p>Confirm Household Members</p> <p>Name</p> <p><input checked="" type="checkbox"/> H</p> <p><input checked="" type="checkbox"/> Y</p> <p>Yes No</p>



Description	Screenshot																														
The ‘Suitable Tenant Characteristics’ screen will display and the referral status will now be ‘Offer Accepted’	<div>Client Application List</div> <table><thead><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></thead><tbody><tr><td>▶ 36501109</td><td>N</td><td>1</td><td>Yes</td><td>A11</td><td>Shortlisted</td></tr><tr><td>▶ 36488028</td><td>D</td><td>1</td><td>No</td><td>A15</td><td>Shortlisted</td></tr><tr><td>▶ 36280121</td><td>L</td><td>2</td><td>Yes</td><td>A7</td><td>Shortlisted</td></tr><tr><td>▶ 20722955</td><td>Y</td><td>2</td><td>Yes</td><td>A17</td><td>Offer Accepted</td></tr></tbody></table>	Application Reference	Main Applicant Name	Number of Bedrooms	Modified Property Required	Priority	Status	▶ 36501109	N	1	Yes	A11	Shortlisted	▶ 36488028	D	1	No	A15	Shortlisted	▶ 36280121	L	2	Yes	A7	Shortlisted	▶ 20722955	Y	2	Yes	A17	Offer Accepted
Application Reference	Main Applicant Name	Number of Bedrooms	Modified Property Required	Priority	Status																										
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▶ 36488028	D	1	No	A15	Shortlisted																										
▶ 36280121	L	2	Yes	A7	Shortlisted																										
▶ 20722955	Y	2	Yes	A17	Offer Accepted																										
<div>Step three</div> <p>Navigate to the tenancy screen to check the details of the new tenancy – see the ‘Tenancy Management’ process for how to do this</p> <ul style="list-style-type: none"><li>• If there is anyone who will be living in the property that wasn’t on the list of household members, you need to advise MSD 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</li><li>• If there is anything else that MSD might need to know, then you need to advise MSD about this, e.g. start date is different from the original start date – see the ‘Tenancy Management’ process</li></ul>	<div><div><div>Vacancies</div><div>Unsolicited shortlist</div><div>Tenancies</div></div><div><div>Tenancies</div><div><div>Tenancy List</div><div>Search</div></div><table><thead><tr><th>Tenancy Reference</th><th>Address Line 1</th><th>Tenancy Agreement Status</th><th>Last Updated</th></tr></thead><tbody><tr><td>SITA00</td><td></td><td>Started</td><td>23/08/2017</td></tr></tbody></table></div></div>	Tenancy Reference	Address Line 1	Tenancy Agreement Status	Last Updated	SITA00		Started	23/08/2017																						
Tenancy Reference	Address Line 1	Tenancy Agreement Status	Last Updated																												
SITA00		Started	23/08/2017																												



**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



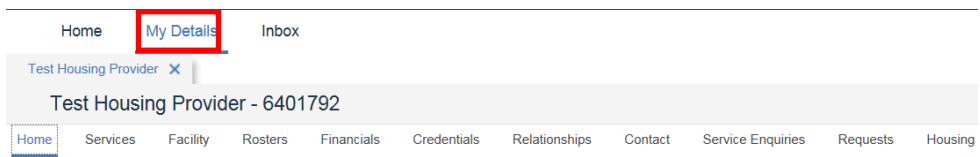
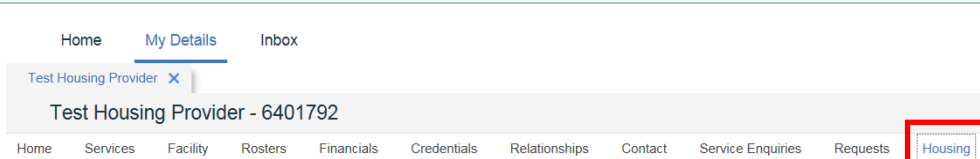
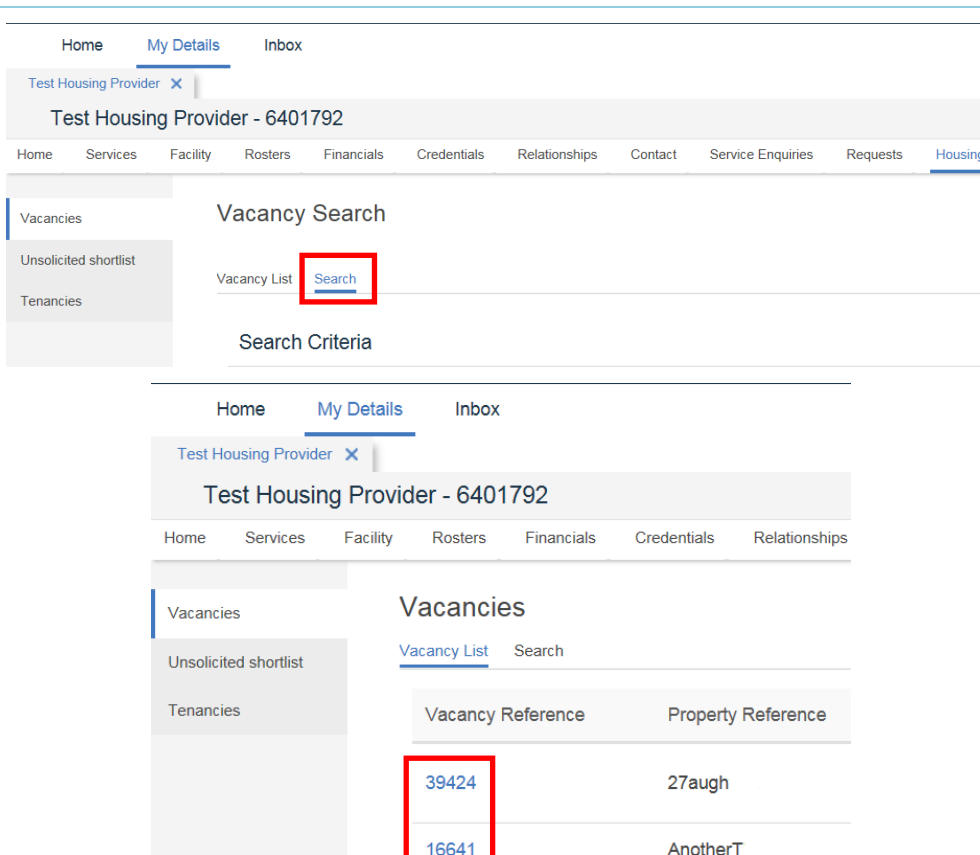
Subject	Type	Name	Communication Status	Date	Status
▼ Change in IRR during offer process	Recorded	Test Housing Provider	Sent	21/12/2017	Active
Communication Text					
Text		Hi			
		The following client has had a change in circumstances which has resulted in a change to the households indicative IRR during 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			

## Editing a property vacancy

Note that:

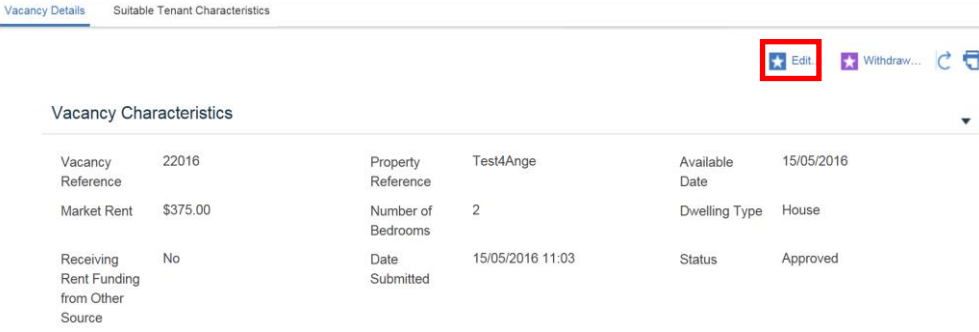
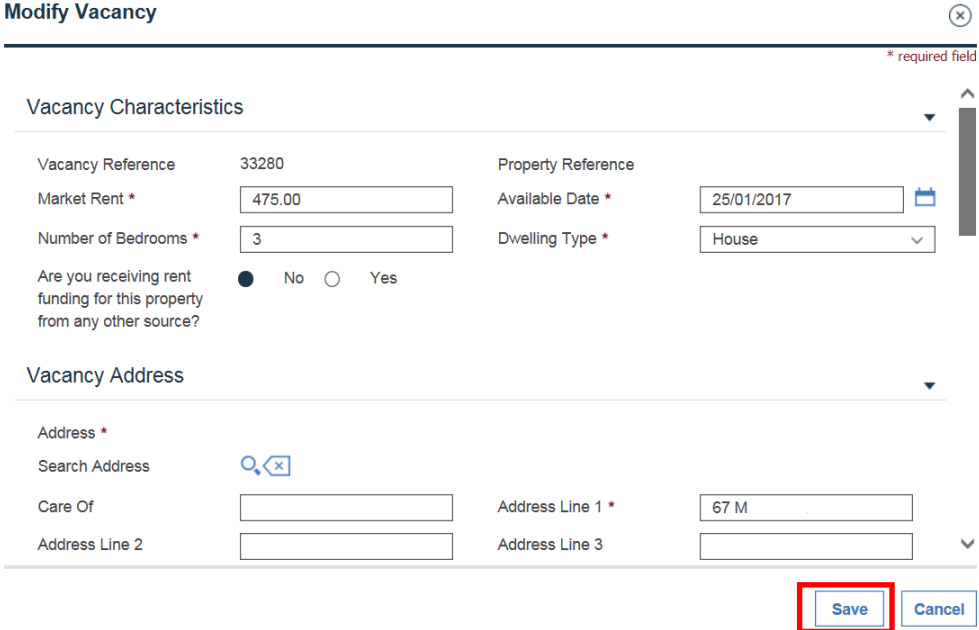
- a vacancy with a status of 'Submitted', 'Declined' or 'Approved' can be updated
- editing the vacancy will not refresh the shortlist
- if you update any details, your vacancy will need to be approved again by HUD. When your vacancy has been approved again, the shortlist will not be refreshed unless you manually refresh it (refer to 'Refresh the shortlist for a property vacancy' on page 49).

Steps to edit vacancy details:

Description	Screenshot
<b>Step one</b> Log into BOS and select 'My Details'	
<b>Step two</b> Select the 'Housing' tab	
<b>Step three</b> Locate the vacancy by either: Searching for it, by clicking on the 'Search' tab: <ul style="list-style-type: none"> <li>• Entering the search criteria and selecting 'Search'</li> <li>• And selecting the vacancy by clicking on the vacancy reference number hyperlink,</li> </ul> Or locating it in the vacancy list and selecting the vacancy by clicking on the vacancy reference number hyperlink	





Description	Screenshot
<p><b>Step four</b></p> <p>Select 'Edit' from the action menu on the Vacancy List screen or on the Vacancy Details screen</p>	
<p><b>Step five</b></p> <p>Update the vacancy details then select 'Save'</p> <p><b>Note:</b> If there are any error messages - the 'Modify Vacancy' screen redisplay with the error messages at the top of the screen</p>	

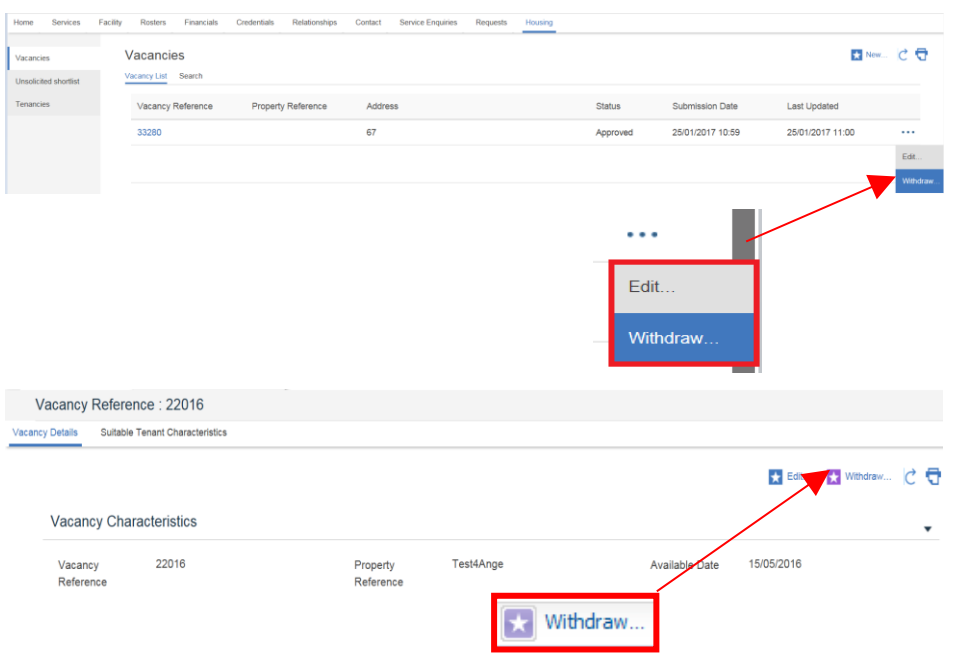


Description	Screenshot
<p><b>Step six</b></p> <p>The 'Vacancy List' or 'Vacancy Details' screen will display</p> <ul style="list-style-type: none"> <li>The vacancy status will display as 'Submitted' on the 'Vacancy List' screen</li> <li>If you have an administrator role, you will receive a notification when the approval process is complete – see the Notifications processes</li> <li>If you log back into BOS, you will see the vacancy status has been updated to 'Approved' on the 'Vacancy List' screen</li> <li>Refresh the shortlist to ensure your vacancies reflect the updated property characteristics</li> </ul>	<p>The screenshot shows the 'Vacancy Details' screen for a vacancy with reference 22016. The screen is divided into several sections:</p> <ul style="list-style-type: none"> <li><b>Vacancy Characteristics:</b> A table showing details such as Vacancy Reference (22016), Property Reference (Test4Ange), Available Date (15/05/2016), Market Rent (\$375.00), Number of Bedrooms (2), Dwelling Type (House), Receiving Rent (No), Date Submitted (15/05/2016 11:03), and Status (Approved).</li> <li><b>Vacancy Address:</b> 10A Tinakori Road, Thorndon, Wellington, 6011, New Zealand.</li> <li><b>Property Characteristics - Special Features:</b> A table showing features like Property has Mobility Support Features (Not Modifiable), Multi-Level (No), Level Access (No), Lifts (No), Ramps / Wheelchair Access (No), Property Internally Modified (No), Internal Modification Details, Warm and Dry Features, Safety Features, and Other Warm and Dry Features.</li> <li><b>Property Characteristics - General:</b> A section for general property details, including Parking.</li> <li><b>Additional Information:</b> A section for additional information.</li> </ul>

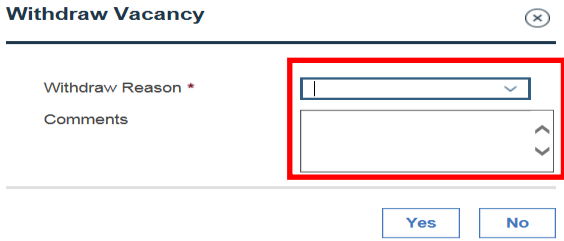
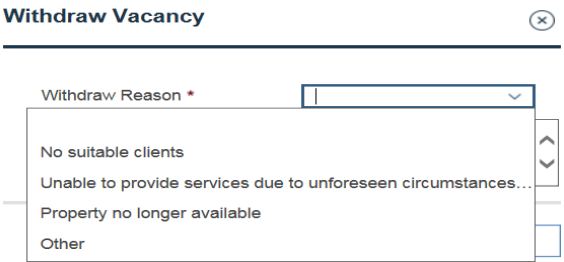
## Withdraw a property vacancy

Prior to withdrawing a vacancy, please make sure you have completed any referrals. If you have an application on the shortlist 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 housing register and considered for other vacancies. Refer to 'Advise MSD that you have decided not to offer the property to the client' on page 53.

Steps to withdraw a vacancy:

Description	Screenshot
<p><b>Step one</b></p> <p>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</p>	 <p>The screenshot displays the 'Housing' tab interface. At the top, there's a navigation bar with 'Home', 'Services', 'Facility', 'Rosters', 'Financials', 'Credentials', 'Relationships', 'Contact', 'Service Enquiries', 'Requests', and 'Housing'. Below this, the 'Vacancies' section is active, showing a 'Vacancy List' with columns: Vacancy Reference, Property Reference, Address, Status, Submission Date, and Last Updated. A table lists one vacancy with reference 33280, property reference 67, status 'Approved', submission date 25/01/2017 10:59, and last updated 25/01/2017 11:00. An action menu (three dots) next to this row shows 'Edit...' and 'Withdraw...' options, with the latter highlighted by a red box and arrow. Below the list, the 'Vacancy Details' for reference 22016 are shown, including 'Vacancy Characteristics' with a table listing Vacancy Reference (22016), Property Reference (Test44Ange), and Available Date (15/05/2016). An action menu at the bottom right of this section also shows 'Edit...' and 'Withdraw...' options, with the latter highlighted by a red box and arrow.</p>



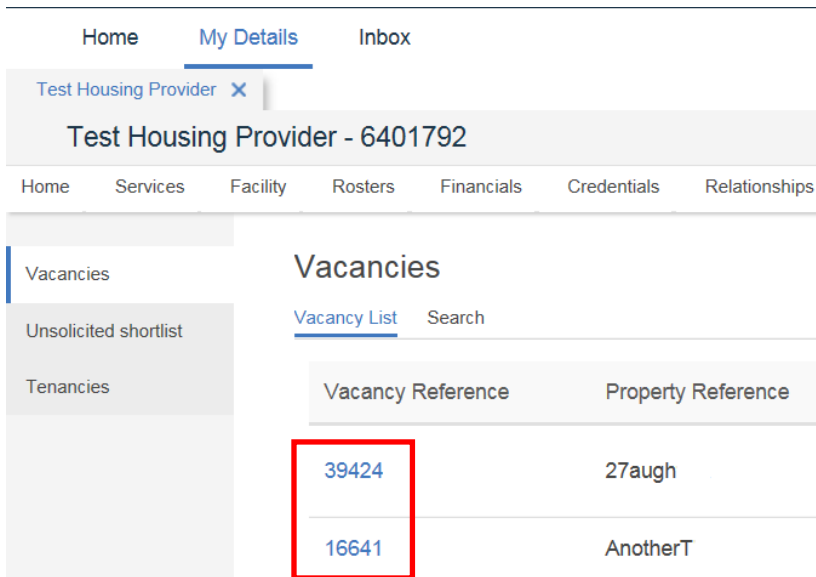
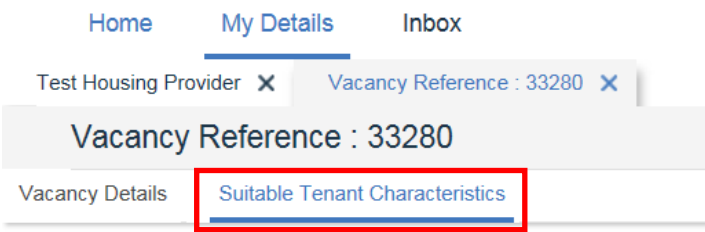
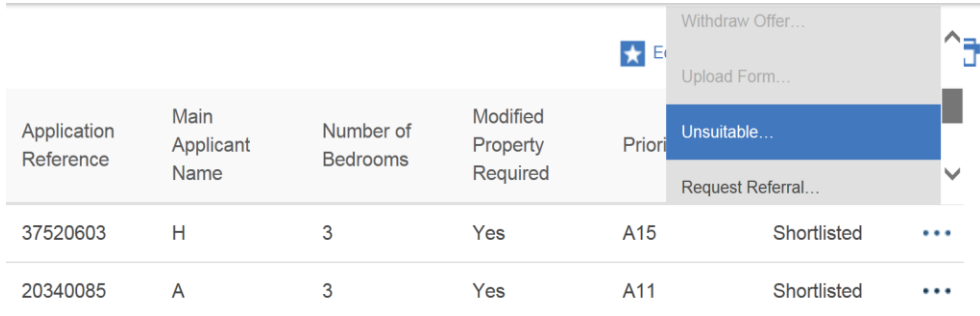
Description	Screenshot
<p><b>Step two</b></p> <p>Select a 'Withdraw reason', add any comments then select 'Yes'</p> <p><b>Note:</b> If there are any error messages - the 'Withdraw Vacancy' screen redisplay with the error messages at the top of the screen. Otherwise, the vacancy status is set to 'Withdrawn' and the 'Vacancy Details' screen will display</p>	<p style="text-align: center;"><b>Withdraw</b></p>  <p style="text-align: center;"><b>Withdraw Reasons</b></p> 

## 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:

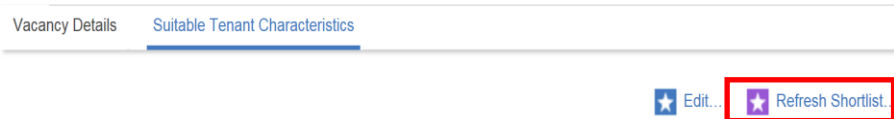
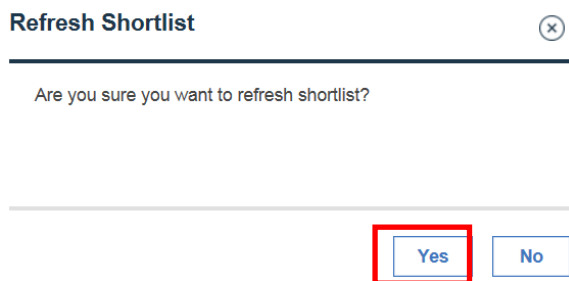
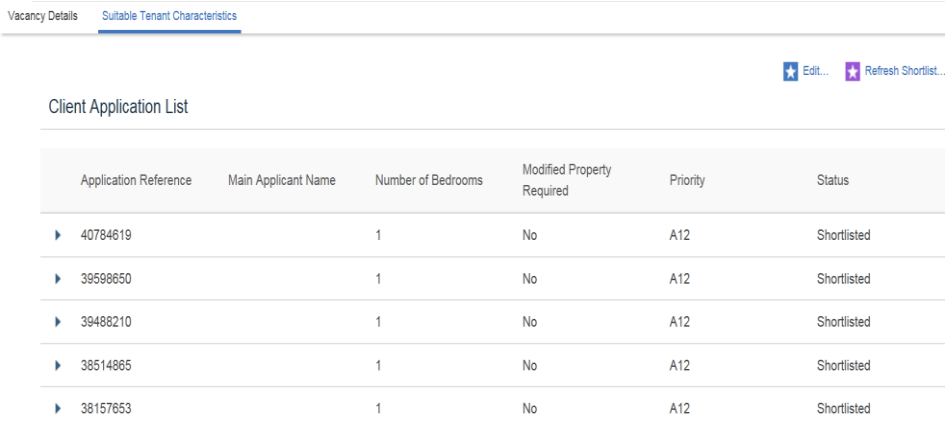
Description	Screenshot
<p><b>Step one</b></p> <p>Navigate to the 'Vacancies' menu</p> <p>Select the 'Vacancy Reference' link</p>	
<p><b>Step two</b></p> <p>Select the 'Suitable Tenant Characteristics' tab</p>	
<p><b>Step three</b></p> <p>Select 'Unsuitable' from the action menu for an application on the client list</p>	



Description	Screenshot
<b>Step four</b> Enter comments, if any, then select 'Save'	
<b>Step five</b> 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'	

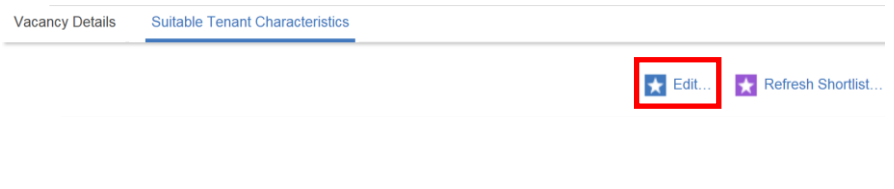
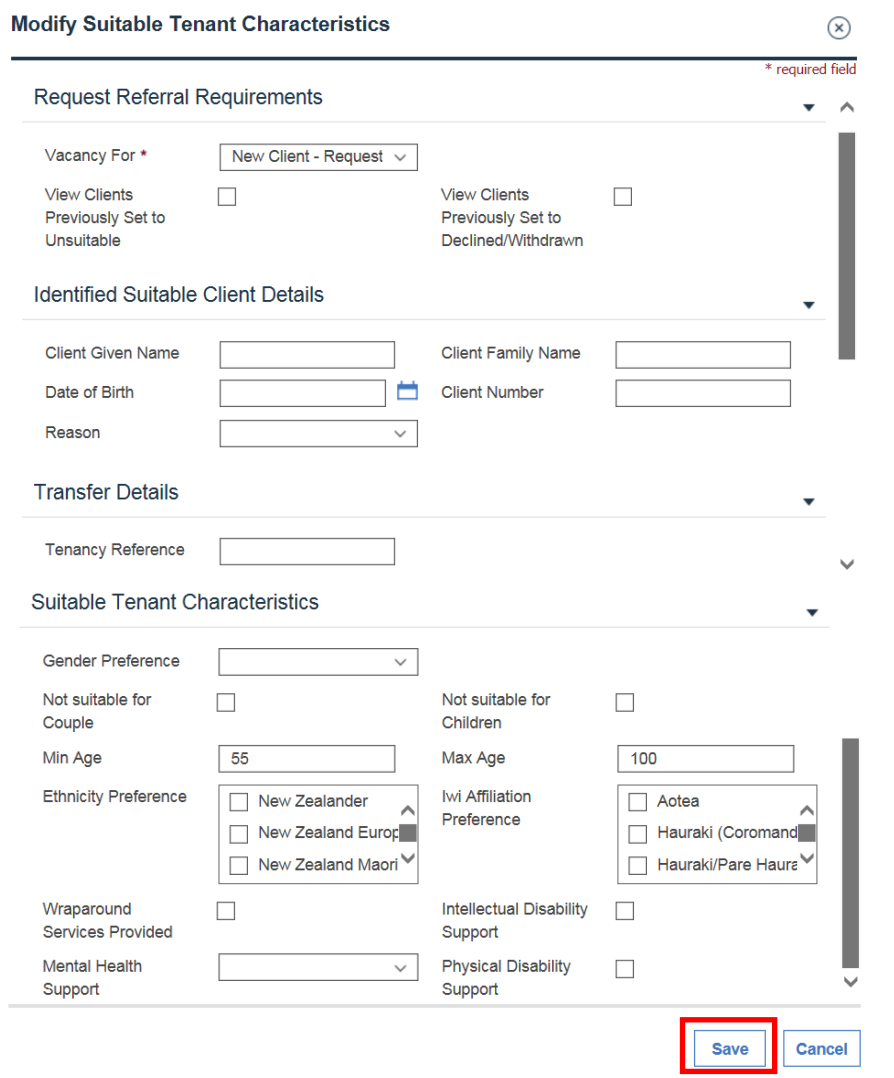
## Refresh the shortlist for a property vacancy

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																																				
<p><b>Step one</b></p> <p>Navigate to the 'Suitable Tenant Characteristics' tab of the vacancy</p> <p>Select 'Refresh Shortlist'</p>																																					
<p><b>Step two</b></p> <p>Confirm that you want to refresh the shortlist by selecting 'Yes'</p>																																					
<p><b>Step three</b></p> <p>The 'Client Application' list will be refreshed</p> <p>The identified suitable client list, if there is one, will display under 'Identified Suitable Client'</p> <p><b>Note:</b> 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</p> <p>You can subsequently view and restore these 'Unsuitable' clients to the shortlist by selecting 'View clients previously set to Unsuitable'</p>	 <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>▶ 40784619</td><td></td><td>1</td><td>No</td><td>A12</td><td>Shortlisted</td></tr><tr><td>▶ 39598650</td><td></td><td>1</td><td>No</td><td>A12</td><td>Shortlisted</td></tr><tr><td>▶ 39488210</td><td></td><td>1</td><td>No</td><td>A12</td><td>Shortlisted</td></tr><tr><td>▶ 38514865</td><td></td><td>1</td><td>No</td><td>A12</td><td>Shortlisted</td></tr><tr><td>▶ 38157653</td><td></td><td>1</td><td>No</td><td>A12</td><td>Shortlisted</td></tr></table>	Application Reference	Main Applicant Name	Number of Bedrooms	Modified Property Required	Priority	Status	▶ 40784619		1	No	A12	Shortlisted	▶ 39598650		1	No	A12	Shortlisted	▶ 39488210		1	No	A12	Shortlisted	▶ 38514865		1	No	A12	Shortlisted	▶ 38157653		1	No	A12	Shortlisted
Application Reference	Main Applicant Name	Number of Bedrooms	Modified Property Required	Priority	Status																																
▶ 40784619		1	No	A12	Shortlisted																																
▶ 39598650		1	No	A12	Shortlisted																																
▶ 39488210		1	No	A12	Shortlisted																																
▶ 38514865		1	No	A12	Shortlisted																																
▶ 38157653		1	No	A12	Shortlisted																																

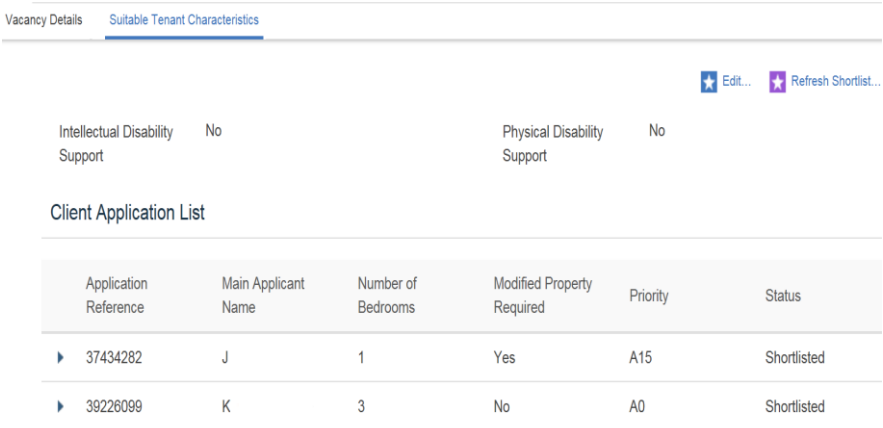
## Create a new shortlist for a property vacancy

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
<p><b>Step one</b></p> <p>Navigate to the 'Suitable Tenant Characteristics' tab of the vacancy</p> <p>Select 'Edit'</p>	
<p><b>Step two</b></p> <p>Update the suitable tenant characteristics then select 'Save'</p> <ul style="list-style-type: none"> <li>'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)</li> <li>If there are any error messages the 'Modify Suitable Tenant Characteristics' screen will redisplay with the error messages at the top of the screen</li> </ul>	



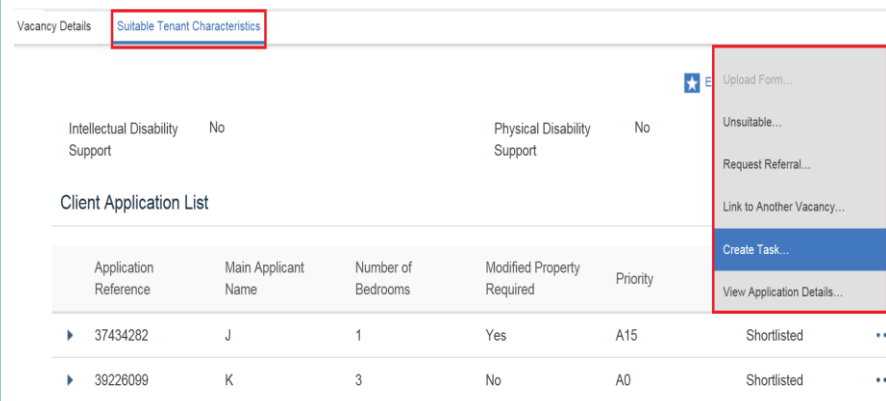
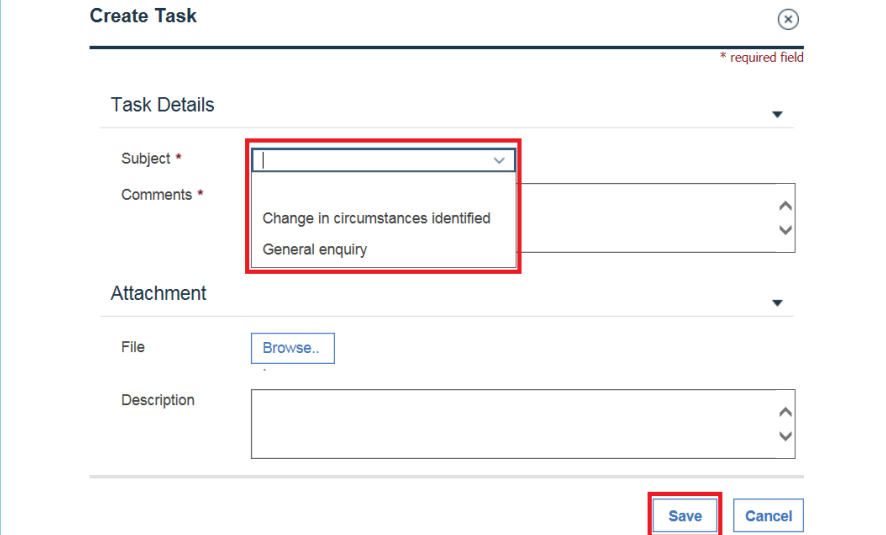
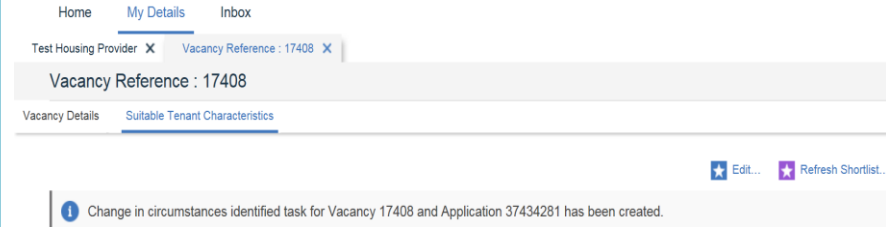


Description	Screenshot
<p><b>Step three</b></p> <p>The 'Suitable Tenant Characteristics' screen displays with a new shortlist</p> <p><b>Note:</b> When you create a new shortlist, all clients with an unsuitable status will be removed from the shortlist and their places will be filled with new clients.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

## Advise MSD 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 MSD of a change in circumstances before you progress.

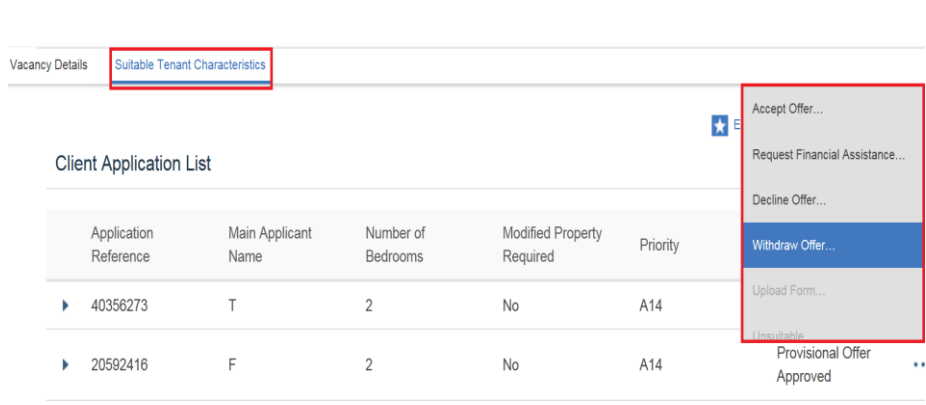
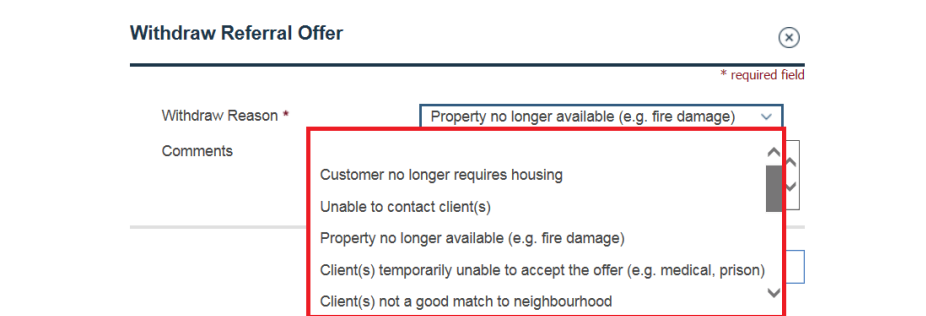
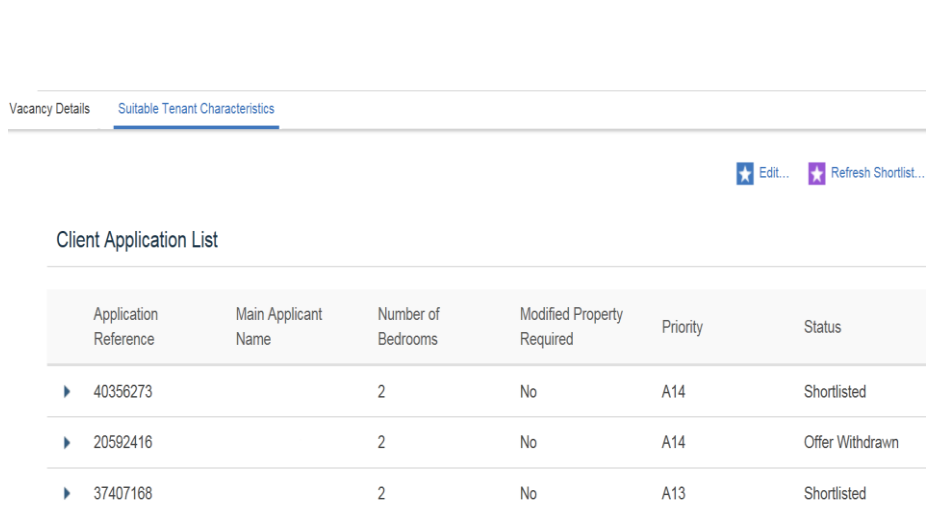
To tell MSD about this:

Description	Screenshot																					
<p><b>Step one</b></p> <p>Navigate to the ‘Suitable Tenant Characteristics’ tab for the vacancy</p> <p>Select ‘Create Task’ from the action menu for the application on the client list</p>	 <p>The screenshot shows the 'Vacancy Details' page with the 'Suitable Tenant Characteristics' tab selected. Below the tab, there are sections for 'Intellectual Disability Support' and 'Physical Disability Support', both marked 'No'. The 'Client Application List' table is visible, showing two applications. The 'Create Task...' button is highlighted in the action menu for the first application.</p> <table><thead><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>Actions</th></tr></thead><tbody><tr><td>▶ 37434282</td><td>J</td><td>1</td><td>Yes</td><td>A15</td><td>Shortlisted</td><td>••</td></tr><tr><td>▶ 39226099</td><td>K</td><td>3</td><td>No</td><td>A0</td><td>Shortlisted</td><td>••</td></tr></tbody></table>	Application Reference	Main Applicant Name	Number of Bedrooms	Modified Property Required	Priority	Status	Actions	▶ 37434282	J	1	Yes	A15	Shortlisted	••	▶ 39226099	K	3	No	A0	Shortlisted	••
Application Reference	Main Applicant Name	Number of Bedrooms	Modified Property Required	Priority	Status	Actions																
▶ 37434282	J	1	Yes	A15	Shortlisted	••																
▶ 39226099	K	3	No	A0	Shortlisted	••																
<p><b>Step two</b></p> <p>Select ‘Change in Circumstances Identified’ as the subject</p> <p>Enter comments, attach a file as supporting information if required and select ‘Save’</p>	 <p>The screenshot shows the 'Create Task' form. The 'Task Details' section has 'Subject' set to 'Change in circumstances identified'. The 'Comments' field is empty. The 'Attachment' section has a 'Browse...' button. The 'Description' field is empty. The 'Save' button is highlighted.</p>																					
<p>The following message will display when this is completed</p>	 <p>The screenshot shows the 'My Details' page with a confirmation message: 'Change in circumstances identified task for Vacancy 17408 and Application 37434281 has been created.'</p>																					

## Advise MSD 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 MSD about this:

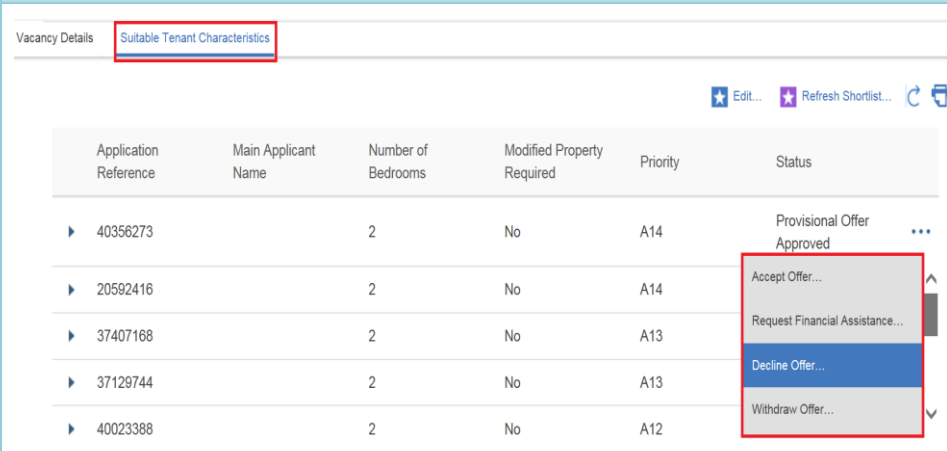
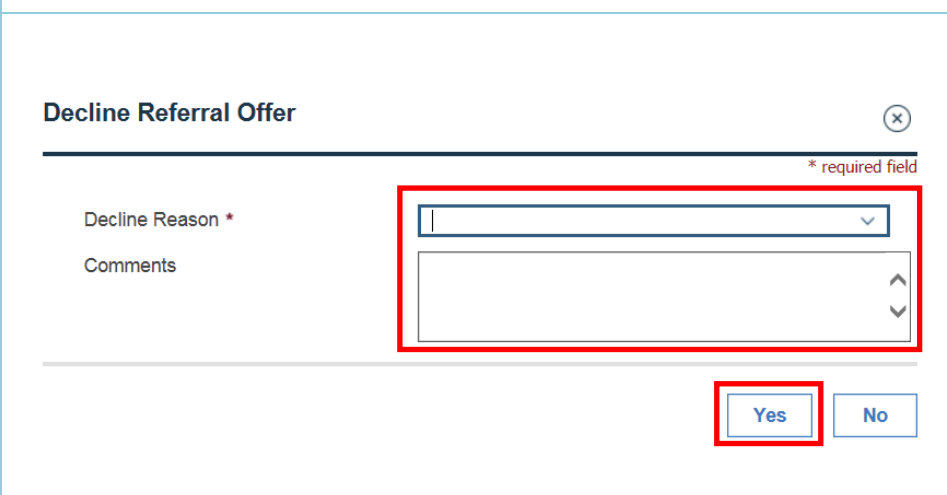
Description	Screenshot
<p><b>Step one</b></p> <p>Navigate to the 'Suitable Tenant Characteristics' tab for the vacancy</p> <p>Select 'Withdraw Offer' from the action menu for the application on the client list</p>	 <p>The screenshot shows the 'Vacancy Details' page for 'Suitable Tenant Characteristics'. Below the header, there is a 'Client Application List' table with columns: Application Reference, Main Applicant Name, Number of Bedrooms, Modified Property Required, and Priority. Two applications are listed: 40356273 (Main Applicant T, 2 bedrooms, No modified property required, Priority A14) and 20592416 (Main Applicant F, 2 bedrooms, No modified property required, Priority A14). An action menu is open for application 40356273, showing options: Accept Offer..., Request Financial Assistance..., Decline Offer..., Withdraw Offer... (highlighted), and Upload Form... Below the table, there is a 'Provisional Offer Approved' status.</p>
<p><b>Step two</b></p> <p>Select the reason from the drop-down box, enter comments if any, and select 'Yes'</p>	 <p>The screenshot shows the 'Withdraw Referral Offer' form. It has a title bar with a close button. Below the title bar, there is a 'Withdraw Reason' dropdown menu with the selected option 'Property no longer available (e.g. fire damage)'. There is a 'Comments' text area. A red box highlights the dropdown menu options: '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)', and 'Client(s) not a good match to neighbourhood'. There is a 'Yes' button at the bottom right.</p>
<p>The 'Withdraw Referral Offer' screen will close and the details will be saved</p> <p><b>Note:</b> If there are any error messages - the 'Withdraw Referral Offer' screen redisplay 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'</p>	 <p>The screenshot shows the 'Vacancy Details' page for 'Suitable Tenant Characteristics'. Below the header, there is a 'Client Application List' table with columns: Application Reference, Main Applicant Name, Number of Bedrooms, Modified Property Required, Priority, and Status. Three applications are listed: 40356273 (Main Applicant T, 2 bedrooms, No modified property required, Priority A14, Status Shortlisted), 20592416 (Main Applicant F, 2 bedrooms, No modified property required, Priority A14, Status Offer Withdrawn), and 37407168 (Main Applicant T, 2 bedrooms, No modified property required, Priority A13, Status Shortlisted). At the top right, there are buttons for 'Edit...' and 'Refresh Shortlist...'.</p>

## Advise MSD that client has declined a property offer

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

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

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

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



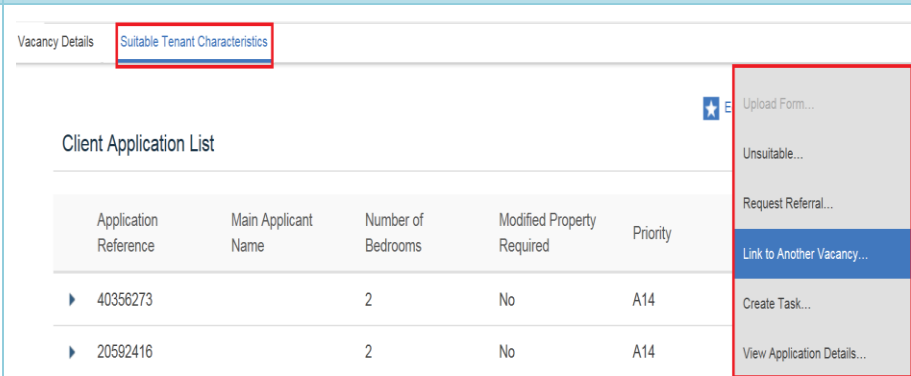
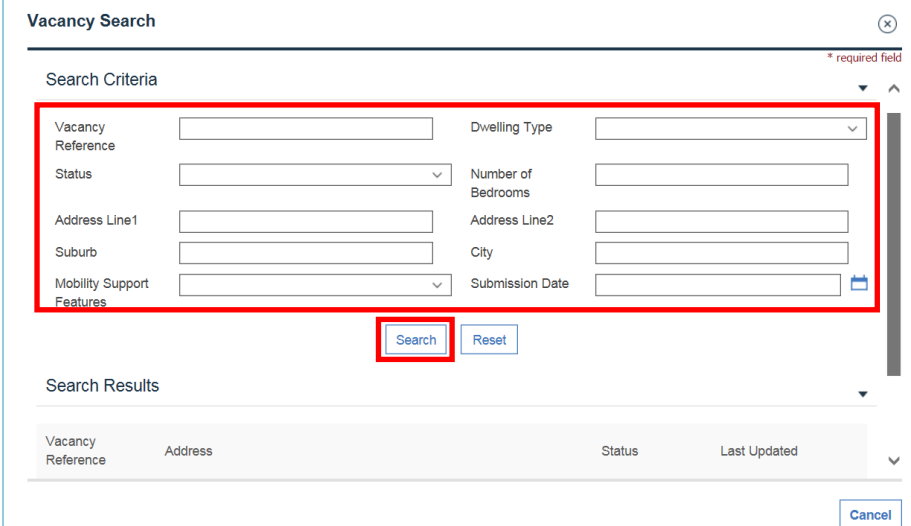
Description	Screenshot
<p>The 'Decline Referral Offer' screen closes and the details will be saved</p> <p><b>Note:</b> If there are any error messages – the 'Decline Referral Offer' screen redisplay with the error messages at the top of the screen. Otherwise the 'Suitable Tenant Characteristics' screen displays and the referral status is set to 'Offer Declined'</p>	

## Link a shortlisted application to a different property vacancy

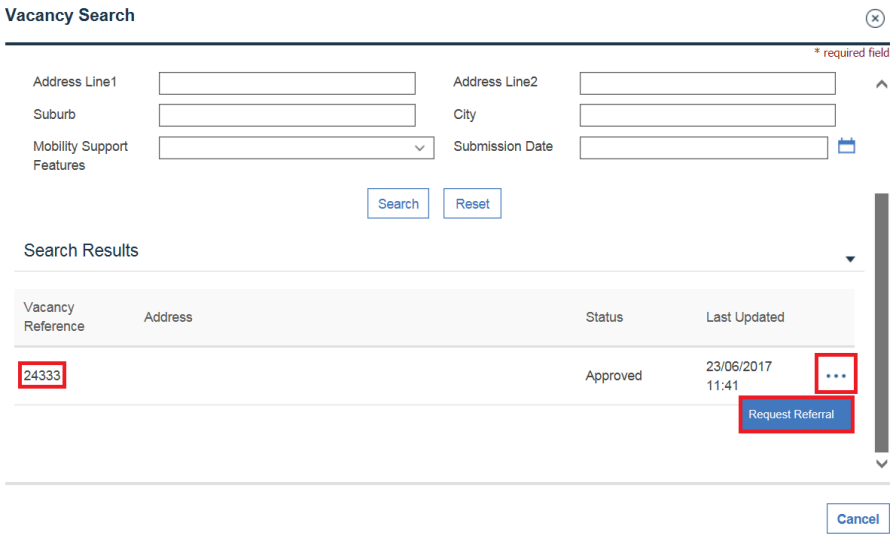
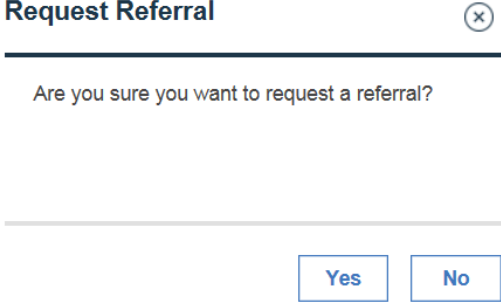
You have the option to link a shortlisted client from one vacancy to another of your vacancies – providing the client hasn't already been shortlisted for the other vacancy or isn't an identified suitable client. To do this, the user selects 'Link to Another Vacancy' from the action menu on the right 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
<p><b>Step one</b></p> <p>Navigate to the 'Suitable Tenant Characteristics' tab for the vacancy</p> <p>Select 'Link to Another Vacancy'</p>	 <p>The screenshot shows the 'Suitable Tenant Characteristics' tab selected. Below the tab is the 'Client Application List' table with columns: Application Reference, Main Applicant Name, Number of Bedrooms, Modified Property Required, and Priority. Two rows are visible with application references 40356273 and 20592416, both with 2 bedrooms and priority A14. To the right of the table is an action menu with options: Upload Form..., Unsuitable..., Request Referral..., Link to Another Vacancy... (highlighted), Create Task..., and View Application Details...</p>
<p><b>Step two</b></p> <p>In the 'Vacancy Search' screen enter your search criteria and select 'Search'</p>	 <p>The screenshot shows the 'Vacancy Search' screen. It has a 'Search Criteria' section with fields for Vacancy Reference, Status, Address Line1, Suburb, Mobility Support Features, Dwelling Type, Number of Bedrooms, Address Line2, City, and Submission Date. The 'Search' button is highlighted. Below the search criteria is a 'Search Results' section with columns for Vacancy Reference, Address, Status, and Last Updated. A 'Cancel' button is at the bottom right.</p>



Description	Screenshot
<p><b>Step three</b></p> <p>Select 'Request Referral' from the action menu of the vacancy you want to match the client to</p>	
<p><b>Step four</b></p> <p>When the 'Request Referral' confirmation screen displays select 'Yes'</p>	
<p>The 'Vacancy Details' screen for the linked vacancy will display a message with the outcome</p>	<p><b>Declined</b></p> <p><i>Declined: The request referral for Application 37520603 for [redacted] has been declined as the Applicant is no longer on the waitlist.</i></p> <p><b>Approved</b></p> <p><i>Approved: The request referral for Application 37407168 for [redacted] has been approved for vacancy 22016.</i></p> <p><b>Pending Approval</b></p> <p><i>Submitted for approval: The request referral for Application 37160220 for [redacted] for vacancy 33280 has been submitted for approval to MSD.</i></p>

## Viewing an unsolicited shortlist

There are some situations where MSD or HUD will 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												
<p><b>Step one</b></p> <p>Navigate to the ‘Housing’ tab and select ‘Unsolicited Shortlist’ from the menu on the left</p>	<div><div><div>Home</div><div>My Details</div><div>Inbox</div></div><div>Test Housing Provider X</div><div>Test Housing Provider - 6401792</div><div>HomeServicesFacilityRostersFinancialsCredentialsRelationshipsContactService EnquiriesRequestsHousing</div><div><div>Vacancies</div><div>Unsolicited shortlist</div><div>Tenancies</div></div><div><div>Unsolicited Shortlist</div><table><thead><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></thead><tbody><tr><td>37641920</td><td></td><td>2</td><td>Yes</td><td>A19</td><td>Shortlisted</td></tr></tbody></table></div></div>	Application Reference	Main Applicant Name	Number of Bedrooms	Modified Property Required	Priority	Status	37641920		2	Yes	A19	Shortlisted
Application Reference	Main Applicant Name	Number of Bedrooms	Modified Property Required	Priority	Status								
37641920		2	Yes	A19	Shortlisted								

## Request the referral of an application on an unsolicited shortlist

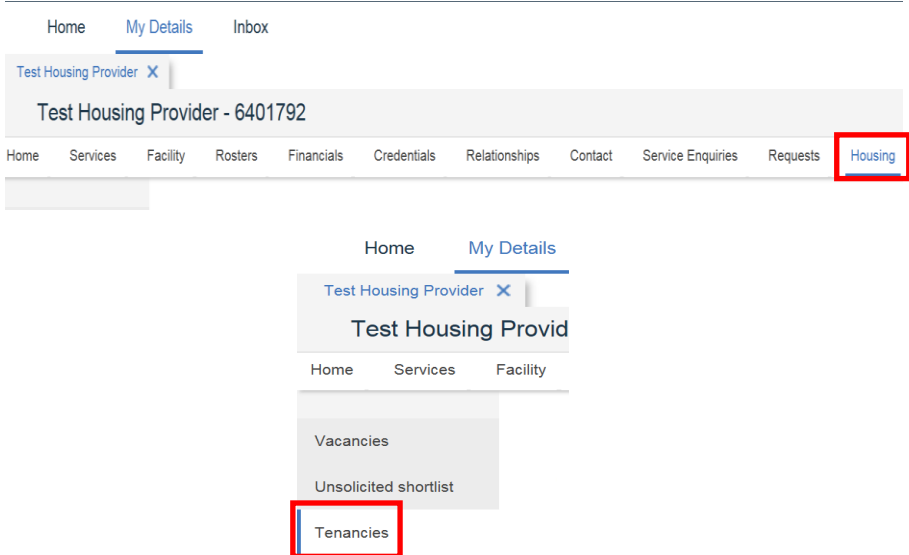
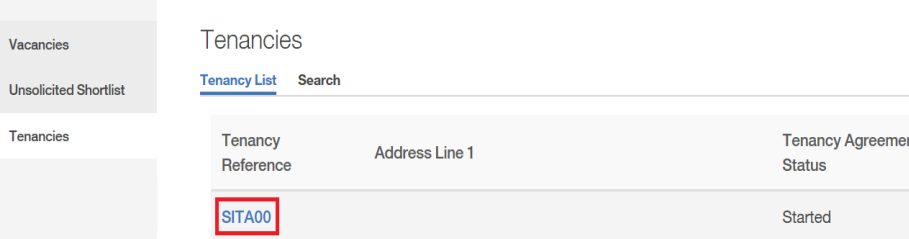
The Link to Another Vacancy screen displays when you select 'Refer to Vacancy' on the 'Unsolicited Shortlist' screen. Follow the 'Link a shortlisted application to a different property vacancy' pathway to request a referral for an application on an unsolicited shortlist.



## Part 3: Tenancy Management

### Advise MSD that a tenancy agreement has been cancelled

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

Description	Screenshot
<p><b>Step one</b></p> <p>Log into BOS and select 'My Details'</p> <p>Select the 'Housing' tab</p> <p>Navigate to the 'Tenancies' tab</p>	 <p>The screenshot shows the BOS 'My Details' page. The top navigation bar has 'Home', 'My Details' (selected), and 'Inbox'. Below this is a breadcrumb 'Test Housing Provider &gt;'. The main navigation bar includes 'Home', 'Services', 'Facility', 'Rosters', 'Financials', 'Credentials', 'Relationships', 'Contact', 'Service Enquiries', 'Requests', and 'Housing' (highlighted with a red box). The left sidebar shows 'Vacancies', 'Unsolicited shortlist', and 'Tenancies' (highlighted with a red box).</p>
<p><b>Step two</b></p> <p>Locate the tenancy from the tenancy list</p>	 <p>The screenshot shows the BOS 'Tenancies' page. The left sidebar has 'Vacancies', 'Unsolicited Shortlist', and 'Tenancies' (selected). The main content area has a 'Tenancies' header and a 'Tenancy List' link. Below is a table with columns 'Tenancy Reference', 'Address Line 1', and 'Tenancy Agreement Status'. The first row shows 'SITA00' (highlighted with a red box) and 'Started'.</p>



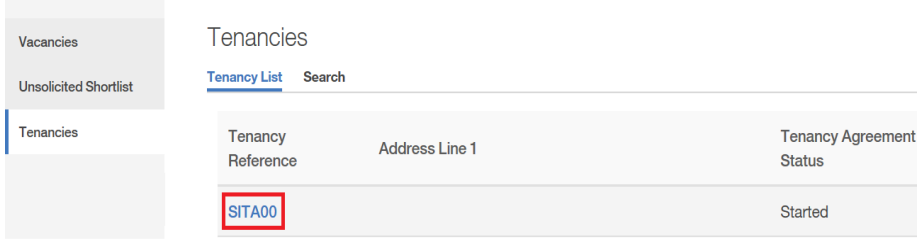
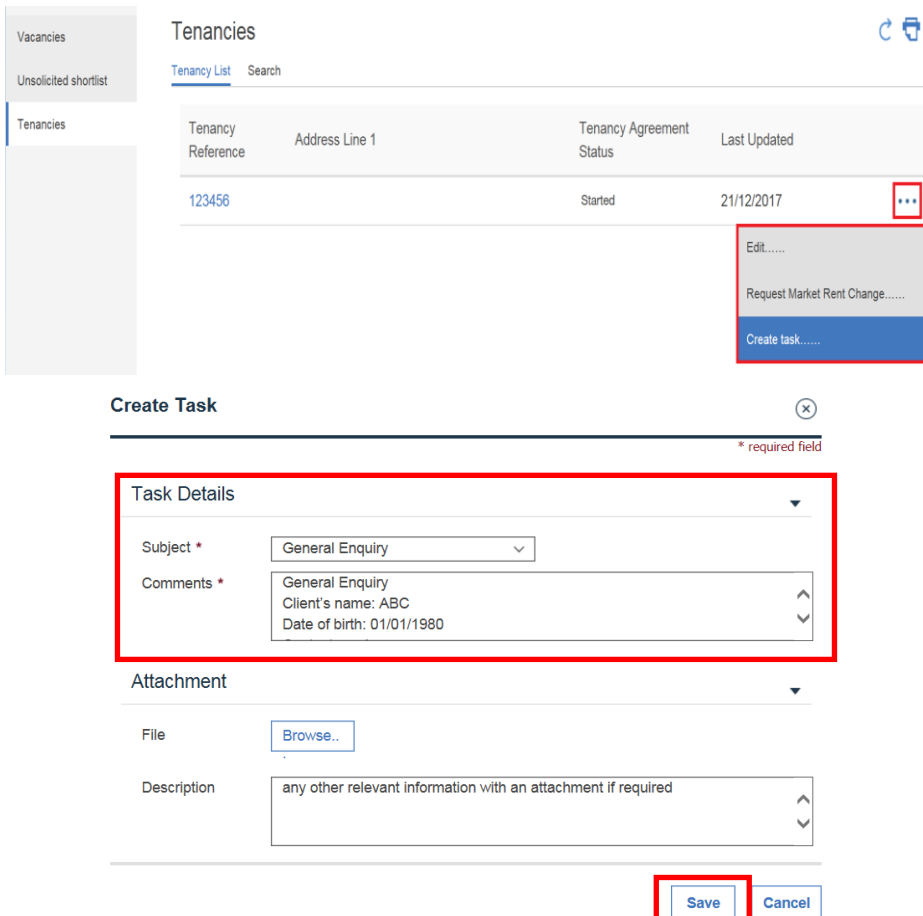
Description	Screenshot
<p><b>Step three</b></p> <p>Select 'Create task' from the action menu for the tenancy</p> <p>Set the subject to 'General Enquiry', enter the details in the Comments field and select 'Save'</p>	<p>The screenshot displays the 'Tenancies' management interface. On the left, a sidebar shows 'Vacancies', 'Unsolicited shortlist', and 'Tenancies'. The main area shows a table of tenancies with columns: Tenancy Reference, Address Line 1, Tenancy Agreement Status, and Last Updated. A single entry is visible with reference 123456 and status 'Started'. An action menu (three dots) is open for this entry, showing options: 'Edit.....', 'Request Market Rent Change.....', and 'Create task.....'. Below the table, the 'Create Task' form is shown. The 'Task Details' section is highlighted with a red box and contains a 'Subject' dropdown set to 'General Enquiry' and a 'Comments' text area. Below this is an 'Attachment' section with a 'File' field and a 'Browse..' button. At the bottom right, the 'Save' button is highlighted with a red box, next to a 'Cancel' button. A note at the bottom of the screenshot states: 'Note: To get another shortlist for the property, you will need to re-submit the property as a new vacancy.'</p>

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

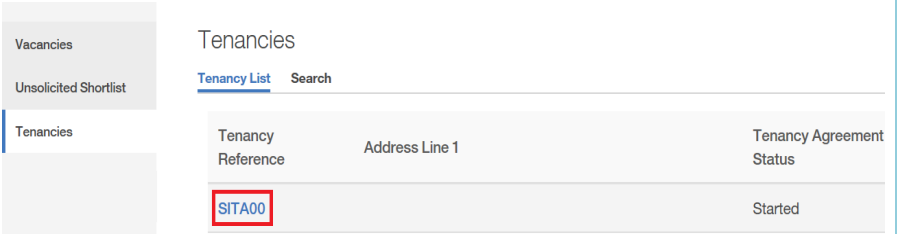
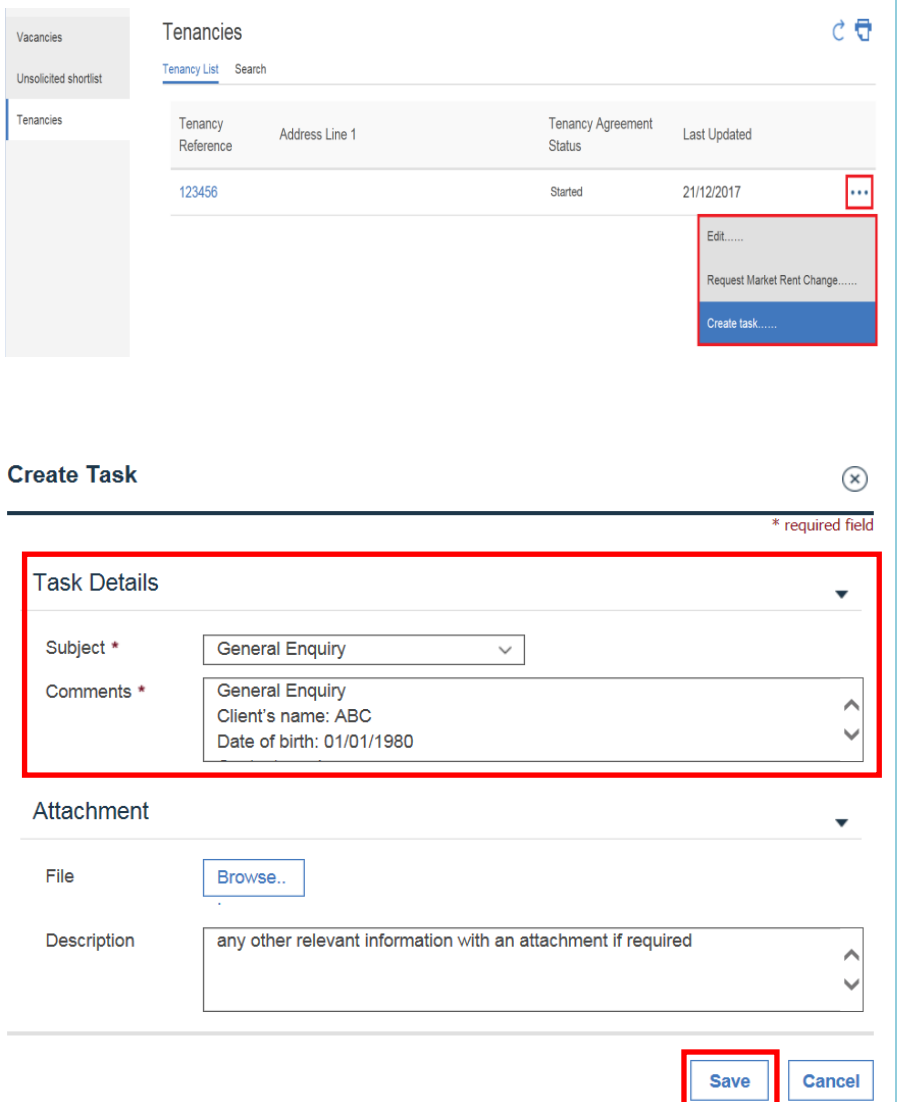
If you need to make any changes to the rent redirection payment reference, rent charge date, rent redirection start date or tenancy start date for any reason, you will need to create a task under 'General Enquiry' for MSD to process.

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
<p><b>Step one</b></p> <p>Navigate to the tenancy by selecting the 'Tenancy Reference' link from the tenancies list</p>	 <p>The screenshot shows the 'Tenancies' section of a web application. On the left is a sidebar with 'Vacancies', 'Unsolicited Shortlist', and 'Tenancies'. The 'Tenancies' section is active, displaying a table with columns: 'Tenancy Reference', 'Address Line 1', and 'Tenancy Agreement Status'. A row with 'SITA00' in the 'Tenancy Reference' column and 'Started' in the 'Tenancy Agreement Status' column is highlighted with a red box.</p>
<p><b>Step two</b></p> <p>Select 'Create task' from the action menu for the tenancy</p> <p>Set the subject to 'General Enquiry'</p>	 <p>The screenshot shows the 'Create Task' form. At the top, the 'Tenancies' section is visible with a table containing one row with '123456' as the 'Tenancy Reference' and 'Started' as the 'Tenancy Agreement Status'. A red box highlights the action menu (three dots) for this row. Below the table, the 'Create Task' form is shown. The 'Task Details' section is highlighted with a red box and contains:         <ul style="list-style-type: none"> <li><b>Subject *</b>: A dropdown menu with 'General Enquiry' selected.</li> <li><b>Comments *</b>: A text area containing 'General Enquiry', 'Client's name: ABC', and 'Date of birth: 01/01/1980'.</li> </ul>         Below this is the 'Attachment' section with a 'File' field (containing a 'Browse..' button) and a 'Description' field (containing the text 'any other relevant information with an attachment if required'). At the bottom right, 'Save' and 'Cancel' buttons are shown, with 'Save' highlighted by a red box.       </p>

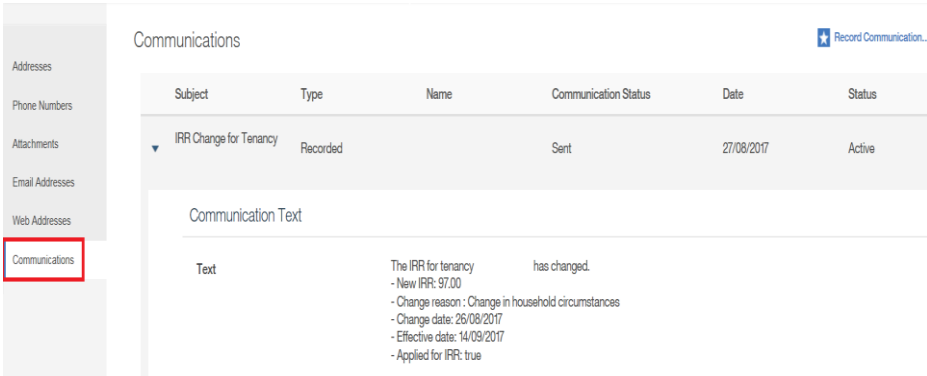
## Advise MSD of an additional redirection for rent arrears or damages

Description	Screenshot
<p><b>Step one</b></p> <p>Navigate to the tenancy by selecting the 'Tenancy Reference' link from the tenancies list</p>	
<p><b>Step two</b></p> <p>Select 'Create task' from the action menu for the tenancy</p> <p>Set the subject to 'General Enquiry'</p> <p>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</p> <p>Refer to 'Redirection of benefit' in the Operational Guidelines for more information</p>	

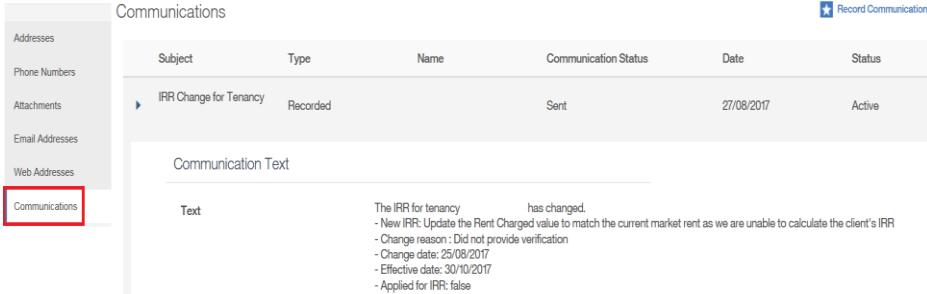
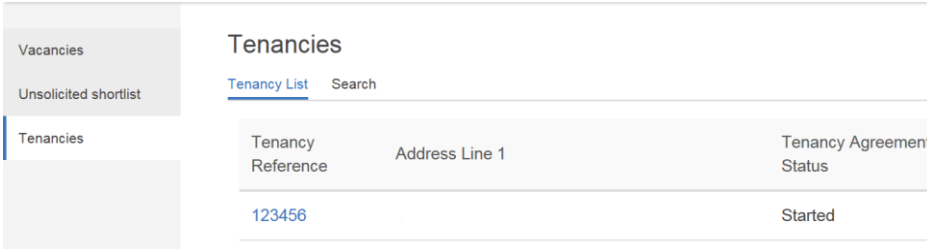
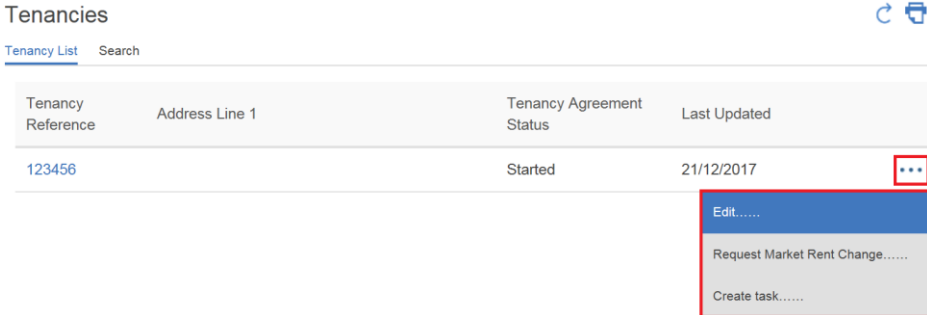
## Advise MSD of a change to the rent amount

If you receive a notification from MSD 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.

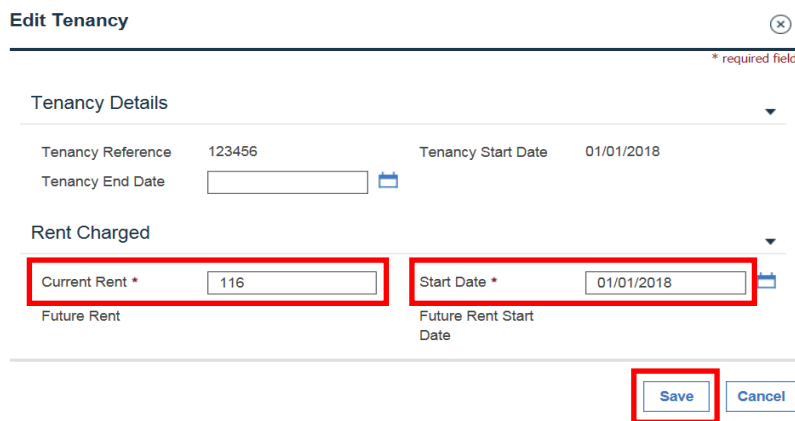
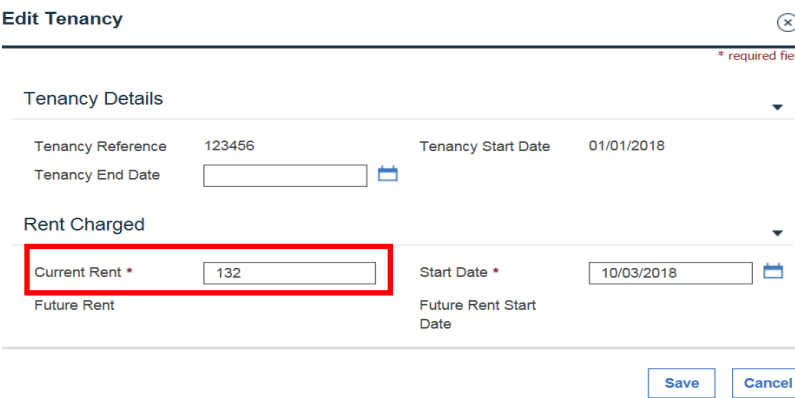
**Note:** Decreases to IRR should be administered immediately. Increases to IRR must be processed seven days prior to the effective date of change.

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



Description	Screenshot
	 <p>If a tenant 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 tenant's IRR”.</p> <p>This means that the tenant 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.</p>
<b>Step one</b> Navigate to the tenancy by selecting the ‘Tenancy Reference’ link from the tenancies list	
<b>Step two</b> Select ‘Edit’ from the action menu within the tenancy details	



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

### **Important**

1. Where an IRR amount has decreased and the effective date in the notification is showing:

- a past date; or
- a future date that is more than seven days,

decrease the IRR immediately or from the next rent charge date and update the rent change following the process above.

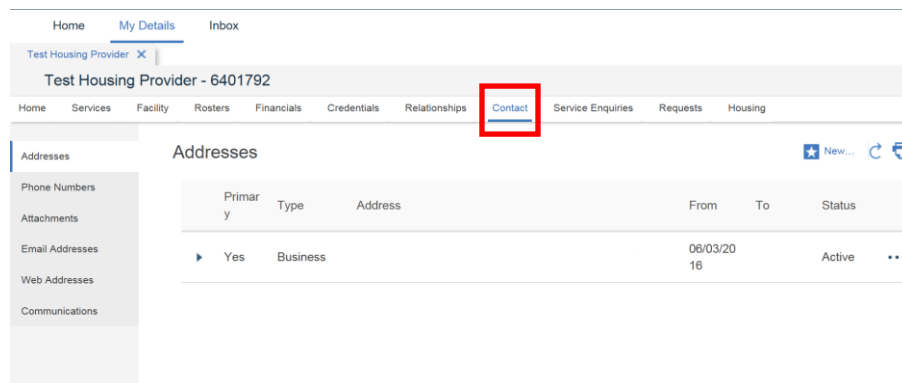
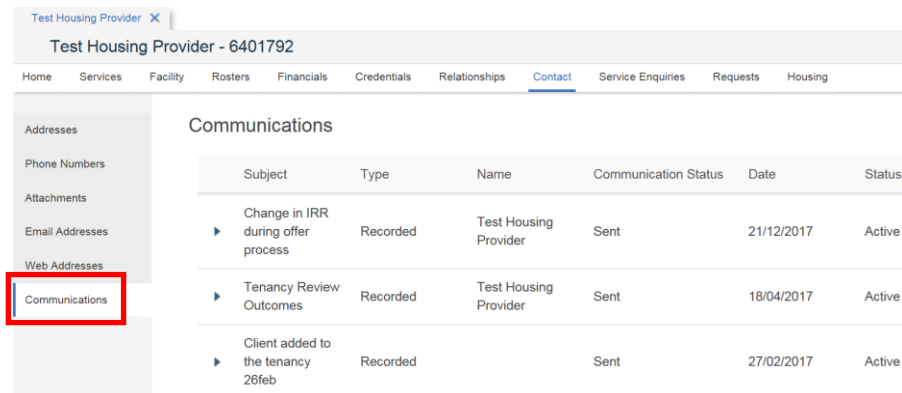
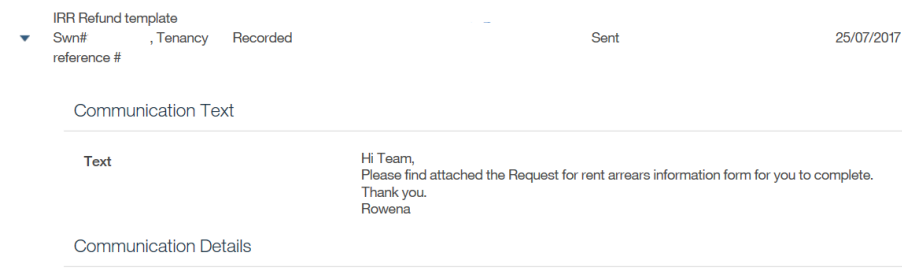
2. Where an IRR amount has increased and the effective date in the notification is showing:

- 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', 'Did Not Provide Verification' and 'Did Not Apply',

email [GNL\\_Provider\\_Support@msd.govt.nz](mailto:GNL_Provider_Support@msd.govt.nz) using the 'Lack of Notice Period' email template in Appendix B to receive a new notification.

## View details of a request for information about rent arrears

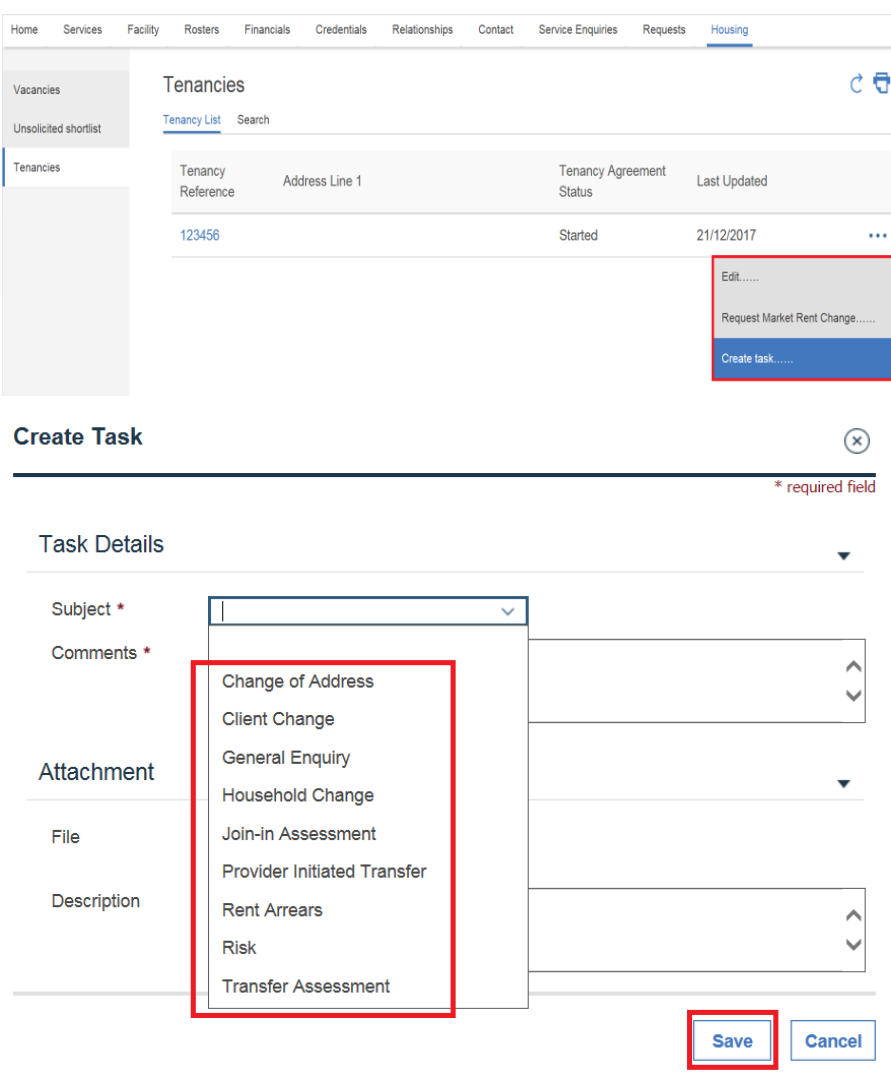
MSD may assess an IRR overpayment and before paying the refund to the tenant, may ask you if the tenant is in rental arrears. If you have an administrator role, you will get a notification in your inbox. If not, you can see details of the request by:

Description	Screenshot																								
<h3>Step one</h3> <p>Log in to BOS and navigate to the ‘Contact’ tab from within ‘My Details’</p>	 <p>The screenshot shows the 'My Details' page for a 'Test Housing Provider - 6401792'. The 'Contact' tab is highlighted with a red box. The page displays a list of addresses.</p> <table><thead><tr><th>Primary</th><th>Type</th><th>Address</th><th>From</th><th>To</th><th>Status</th></tr></thead><tbody><tr><td>▶ Yes</td><td>Business</td><td></td><td>06/03/2016</td><td></td><td>Active</td></tr></tbody></table>	Primary	Type	Address	From	To	Status	▶ Yes	Business		06/03/2016		Active												
Primary	Type	Address	From	To	Status																				
▶ Yes	Business		06/03/2016		Active																				
<h3>Step two</h3> <p>Select the ‘Communications’ tab</p>	 <p>The screenshot shows the 'Communications' page for the same 'Test Housing Provider - 6401792'. The 'Communications' tab is highlighted with a red box. The page displays a list of communications.</p> <table><thead><tr><th>Subject</th><th>Type</th><th>Name</th><th>Communication Status</th><th>Date</th><th>Status</th></tr></thead><tbody><tr><td>▶ Change in IRR during offer process</td><td>Recorded</td><td>Test Housing Provider</td><td>Sent</td><td>21/12/2017</td><td>Active</td></tr><tr><td>▶ Tenancy Review Outcomes</td><td>Recorded</td><td>Test Housing Provider</td><td>Sent</td><td>18/04/2017</td><td>Active</td></tr><tr><td>▶ Client added to the tenancy 26feb</td><td>Recorded</td><td></td><td>Sent</td><td>27/02/2017</td><td>Active</td></tr></tbody></table>	Subject	Type	Name	Communication Status	Date	Status	▶ Change in IRR during offer process	Recorded	Test Housing Provider	Sent	21/12/2017	Active	▶ Tenancy Review Outcomes	Recorded	Test Housing Provider	Sent	18/04/2017	Active	▶ Client added to the tenancy 26feb	Recorded		Sent	27/02/2017	Active
Subject	Type	Name	Communication Status	Date	Status																				
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▶ Client added to the tenancy 26feb	Recorded		Sent	27/02/2017	Active																				
<h3>Step three</h3> <p>Search through the list to find the relevant ‘Rent Arrears request’ and expand to view details and select File Name</p>	 <p>The screenshot shows the 'Communication Details' page for a specific communication. It displays the 'Communication Text' and 'Communication Details'.</p> <p><b>Communication Text</b></p> <p>Text</p> <p>Hi Team, Please find attached the Request for rent arrears information form for you to complete. Thank you. Rowena</p> <p><b>Communication Details</b></p>																								
<p><b>Note:</b> The rent arrears information will be found within your own records, separate from BOS and you may be asked to provide a screenshot of the rent changes by MSD</p>																									



## Advise MSD about the amount of rent arrears owed

To respond to MSD's request regarding rent arrears:

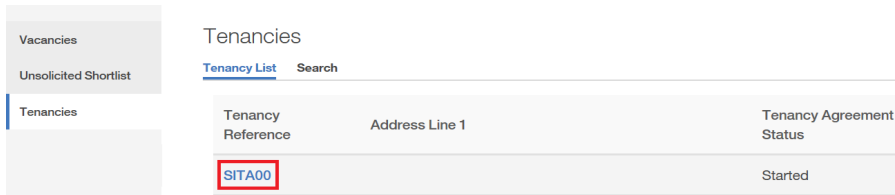
Description	Screenshot
<p><b>Step one</b></p> <p>Navigate to the tenancy by selecting the 'Tenancy Reference' link from the tenancies list</p> <p>Select 'Create task' from the action menu for the tenancy</p> <p>Set the subject to 'Rent Arrears'</p> <p>Upload the completed 'Request for rent arrears information form' and select 'Save'</p>	 <p>The screenshot shows the 'Tenancies' management interface. At the top, there's a navigation bar with links like Home, Services, Facility, Rosters, Financials, Credentials, Relationships, Contact, Service Enquiries, Requests, and Housing. Below this, a sidebar on the left contains 'Vacancies' and 'Tenancies'. The main area displays a 'Tenancies' table with columns: Tenancy Reference, Address Line 1, Tenancy Agreement Status, and Last Updated. A single entry with reference '123456' and status 'Started' is shown. To the right of this entry is an action menu with options: 'Edit.....', 'Request Market Rent Change.....', and 'Create task.....'. Below the table is the 'Create Task' form. It has a 'Task Details' section with a 'Subject *' dropdown (currently showing 'Rent Arrears') and a 'Comments *' text area. There's also an 'Attachment' section with 'File' and 'Description' labels. At the bottom right of the form are 'Save' and 'Cancel' buttons. A red box highlights the 'Subject' dropdown menu, which lists various task types: 'Change of Address', 'Client Change', 'General Enquiry', 'Household Change', 'Join-in Assessment', 'Provider Initiated Transfer', 'Rent Arrears', 'Risk', and 'Transfer Assessment'. Another red box highlights the 'Create task.....' option in the action menu. A third red box highlights the 'Save' button at the bottom of the form.</p>

**Note:** MSD cannot process a refund for the tenant until you have responded to the request for rent arrears information. Please check with your Administrator as they will also receive a notification. You may be asked to provide a screenshot of the rent changes by MSD.

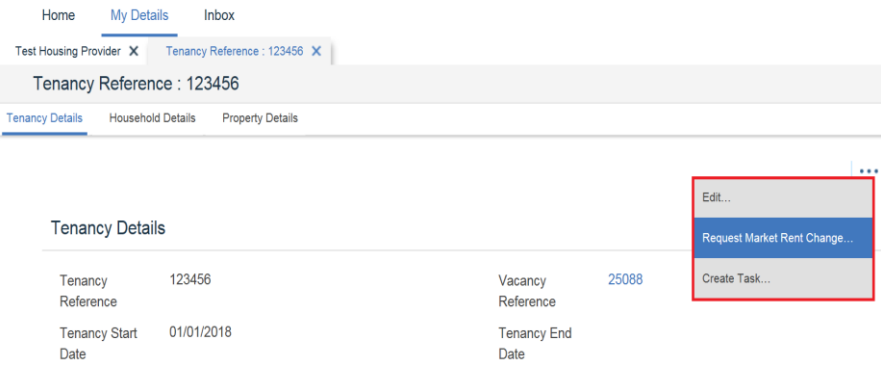
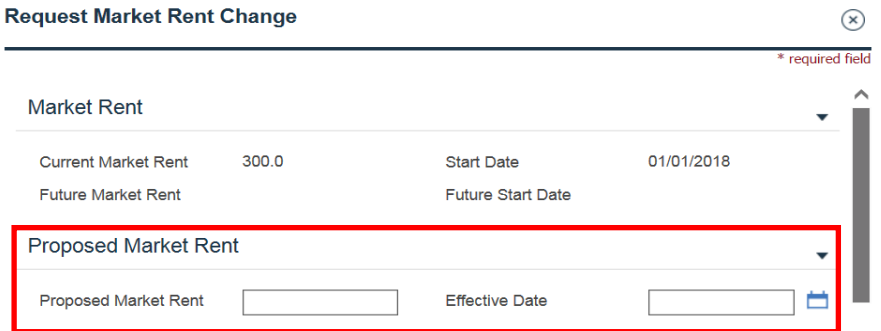
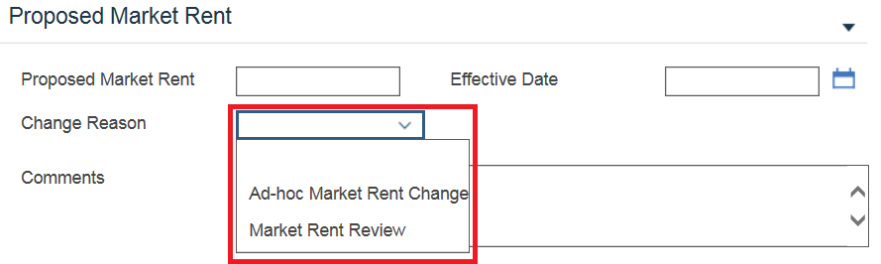
## Notify HUD of annual market rent reviews

The market rents for all of your vacant and tenanted properties are reviewed once a year on an anniversary date of your agreement. If you want an annual market rent review for your properties, follow the steps below:

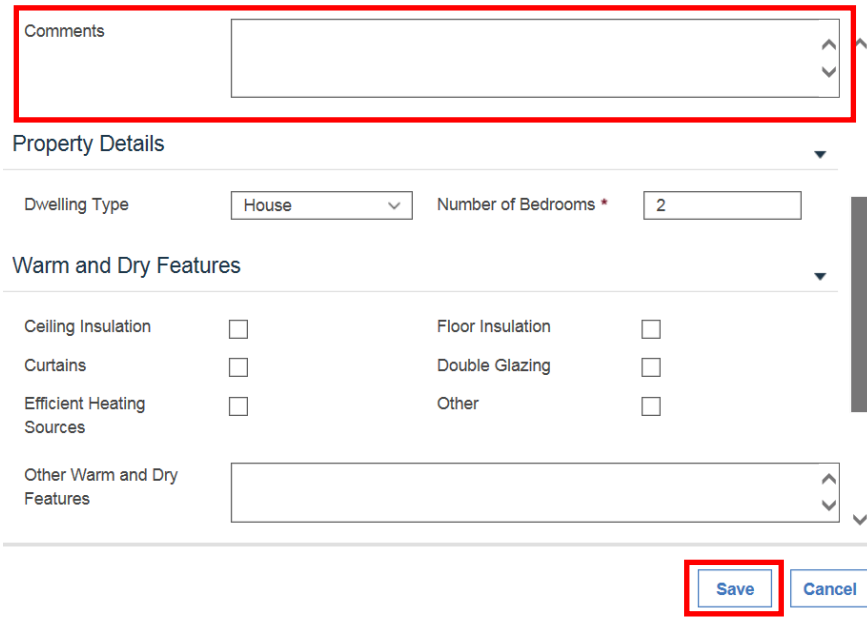
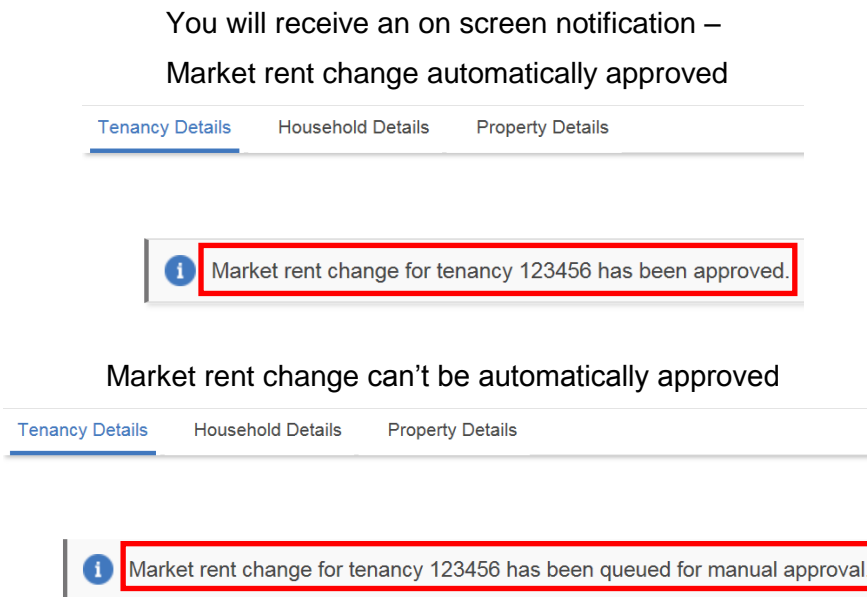
**Note:** Refer to 'Market rent – Open Term' in the Operational Guidelines for more detailed information about annual market rent reviews.

Description	Screenshot
<p><b>Step one</b></p> <p>Contact your relationship manager at HUD approximately a month before your annual market review date to request an Annual Market Rent Review template</p>	
<p><b>Step two</b></p> <p>Complete the template, upload it via BOS and advise your relationship manager via email or phone that you have uploaded the Annual Market Rent Review template in BOS for HUD's approval</p> <p>Refer to Appendix E for uploading documents</p>	
<p><b>Step three</b></p> <p>Your relationship manager will make contact and advise you of the approval outcome</p> <ul style="list-style-type: none"> <li>- If the outcome is declined, the relationship manager will discuss the reasons with you and negotiate new market rents</li> <li>- If the outcome is approved, the relationship manager will advise you of a processing timeframe the new market rent can be requested in BOS</li> </ul> <p><b>Note:</b> The following steps are for tenanted properties only. For vacant properties, the new agreed market rents will be requested through vacancy submissions. Refer to 'Submit a property vacancy' on page 20</p>	
<p><b>Step four</b></p> <p>At the agreed processing timeframe, navigate to the tenancy by selecting the 'Tenancy Reference' link from the tenancies list</p>	



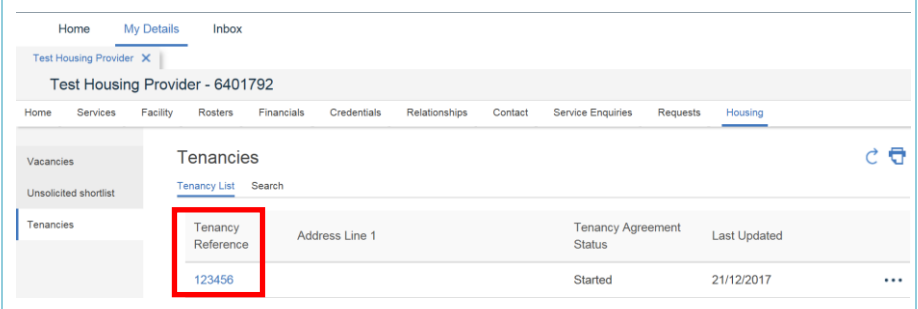
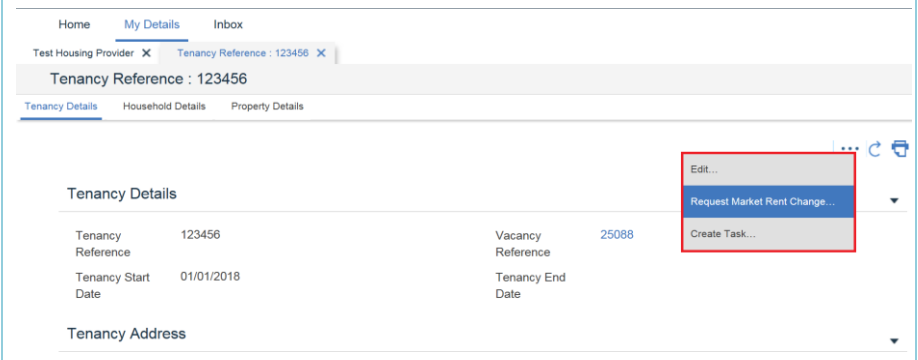
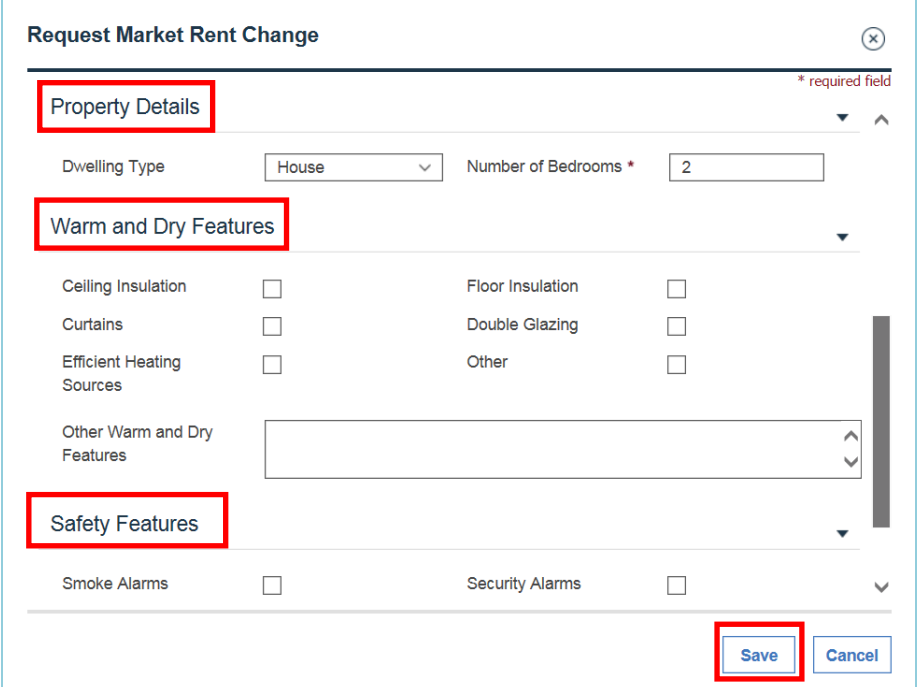
Description	Screenshot
<p><b>Step five</b></p> <p>Select 'Request Market Rent Change'</p>	
<p><b>Step six</b></p> <p>Check the current market rent details and then type in the new agreed market rent and effective date</p>	
<p><b>Step seven</b></p> <p>Select 'Market Rent Review' as the change reason from the drop-down box</p> <p><b>Note:</b> The 'Ad-hoc Market Rent Change' option should not be used unless you are advised by HUD</p>	



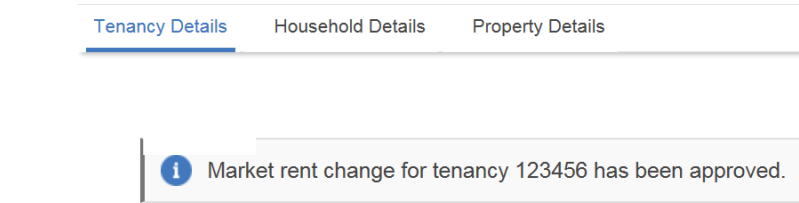
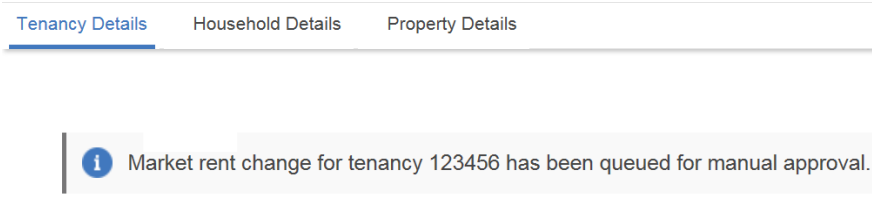
Description	Screenshot
<p><b>Step eight</b></p> <p>Enter any supporting comments</p> <p>This is also a good time to check the 'Warm and Dry Features' and 'Safety Features' for your property are correct and update these, if appropriate</p> <p>Select 'Save'</p>	
<p><b>Note:</b> If the market rent change is approved automatically you will see the new market rent displayed on the tenancy details tab</p> <ul style="list-style-type: none"> <li>If it is not approved automatically you will need to wait for approval from HUD</li> <li>If you have an administrator role, you will receive a notification when the process is complete – see the Notifications processes</li> </ul>	<p>You will receive an on screen notification –</p> <p><b>Market rent change automatically approved</b></p> 

## Advise HUD 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 HUD by updating BOS:

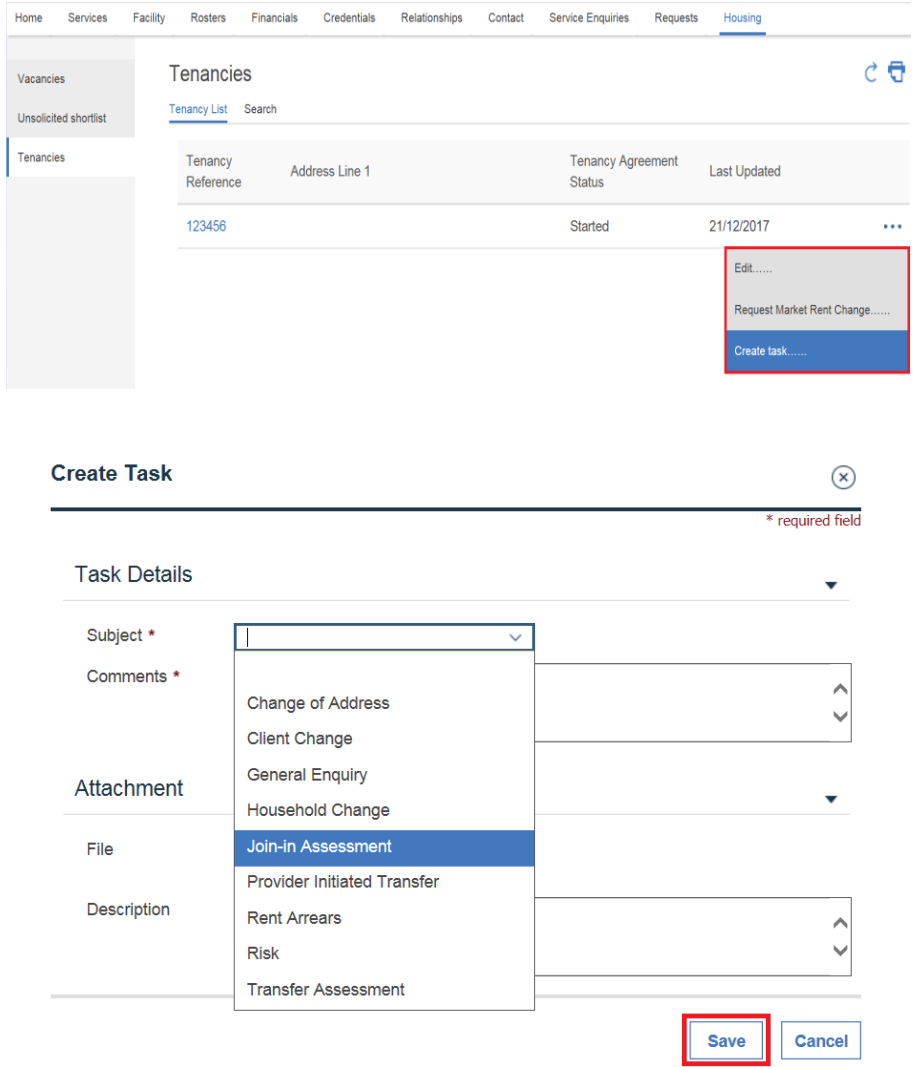
Description	Screenshot
<p><b>Step one</b></p> <p>Navigate to the tenancy by selecting the 'Tenancy Reference' link from the tenancies list</p>	
<p><b>Step two</b></p> <p>Select 'Request Market Rent Change'</p>	
<p><b>Step three</b></p> <p>When the screen displays, update the 'Property Details', 'Warm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



Description	Screenshot
<p><b>Note:</b> The market rent will be re-submitted for approval, based on the updated property details</p> <ul style="list-style-type: none"> <li>• If it is re-approved automatically you will see the new market rent displayed on the tenancy details tab</li> <li>• If it is not approved automatically you will need to wait for this to be approved manually by HUD</li> </ul>	<p>You will receive an on screen notification</p> <p><b>Market rent change automatically approved</b></p>  <p><b>Market rent change can't be automatically approved.</b></p> 

## 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 into an existing tenancy agreement, and you find the prospective tenant is acceptable and the housing is suitable, then you need to provide a notice of conditional agreement to MSD by following the steps below:

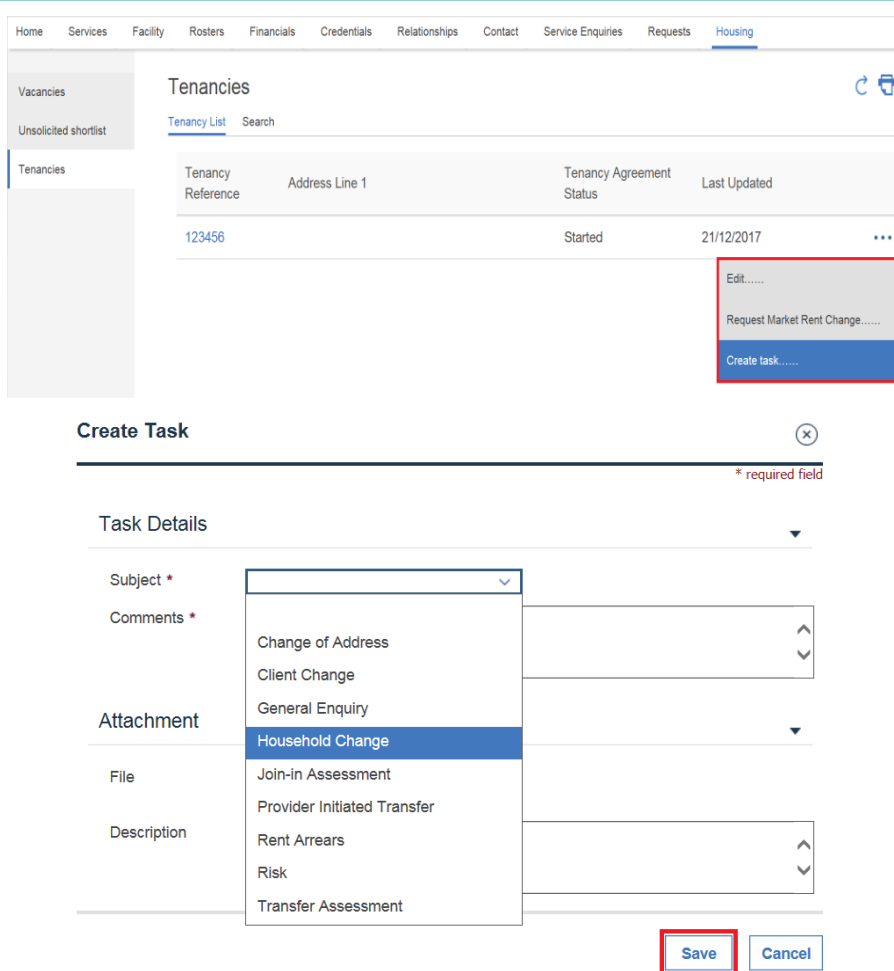
Description	Screenshot
<p><b>Step one</b></p> <p>Navigate to the tenancy by selecting the 'Tenancy Reference' link from the tenancies list and select 'Create task' from the action menu for the tenancy</p> <p>Choose 'Join-in Assessment' as the subject</p> <p>Please refer to Appendix B for templates of information to include and select 'Save'</p> <p>MSD will assess if the person is eligible for public housing and notify you of the outcome.</p> <p><b>Note:</b> A tenancy variation can only be made by you following the join-in assessment outcome for the prospective tenant being eligible for public housing</p> <p>If you have an administrator role, you will receive a notification when the assessment is complete – see the Notifications processes</p>	

If the prospective tenant is found eligible for public housing, you will need to advise MSD of the variation to the tenancy agreement, i.e. tenancy start date, by creating a Household Change task. Refer to 'Notify MSD that a tenancy or household member change has occurred'. More information is available in a diagram in Appendix G and in the Operational Guidelines.

## Notify MSD that a tenancy or household member change has occurred

You need to tell MSD 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 MSD's confirmation that they are eligible to be added as a signatory).

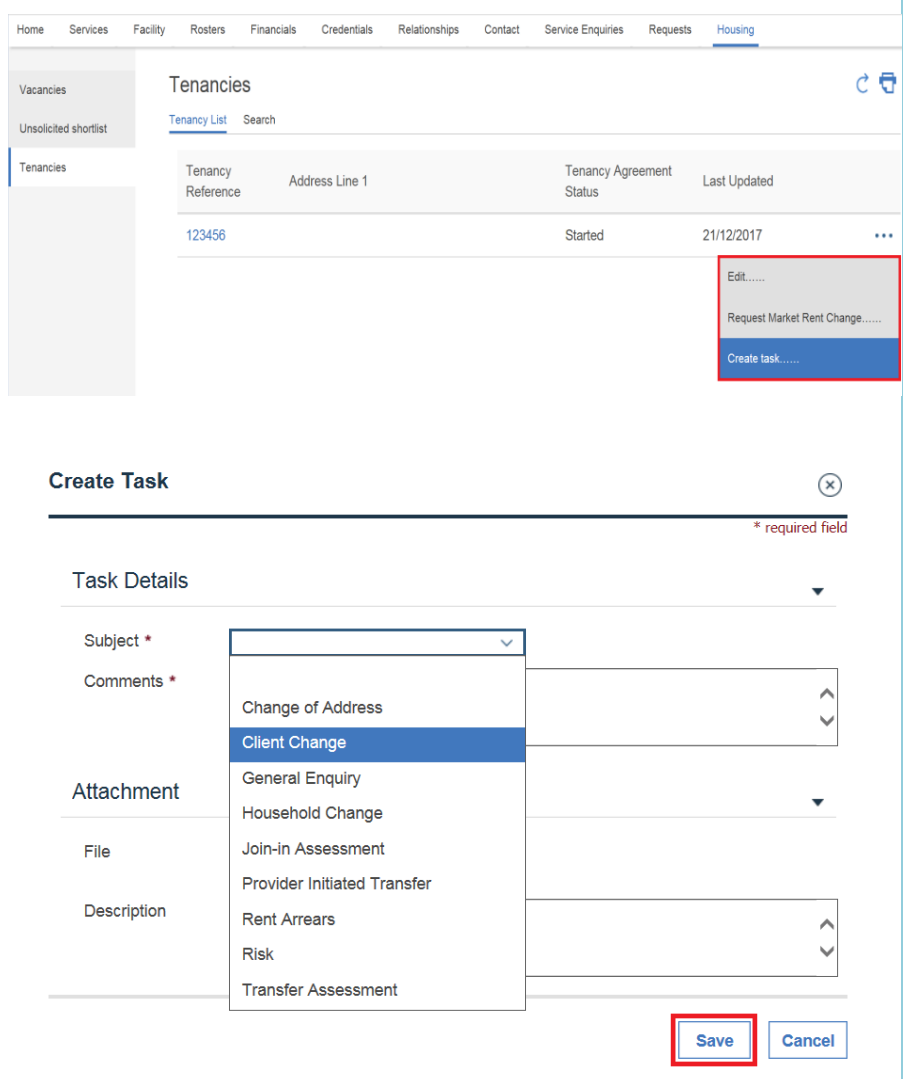
Description	Screenshot
<p><b>Step one</b></p> <p>Navigate to the tenancy by selecting the 'Tenancy Reference' link from the tenancies list and select 'Create task' from the action menu for the tenancy</p> <p>Choose 'Household Change' as the subject</p> <p>Please refer to Appendix B for templates of information to include and select 'Save'</p> <p><b>Note:</b> MSD 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</p>	 <p>The screenshot shows the 'Tenancies' section of a web application. A table lists tenancies with columns for 'Tenancy Reference', 'Address Line 1', 'Tenancy Agreement Status', and 'Last Updated'. A row with reference '123456' and status 'Started' is highlighted. An action menu for this row shows options: 'Edit.....', 'Request Market Rent Change.....', and 'Create task.....'. Below this, the 'Create Task' form is displayed. It has a 'Task Details' section with a 'Subject' dropdown menu. The dropdown is open, showing a list of options. 'Household Change' is selected and highlighted in blue. Other options include 'Change of Address', 'Client Change', 'General Enquiry', 'Join-in Assessment', 'Provider Initiated Transfer', 'Rent Arrears', 'Risk', and 'Transfer Assessment'. There are also fields for 'Comments', 'Attachment', 'File', and 'Description'. At the bottom right of the form, there are 'Save' and 'Cancel' buttons. The 'Save' button is highlighted with a red box.</p>

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



## Advise MSD about a client change

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

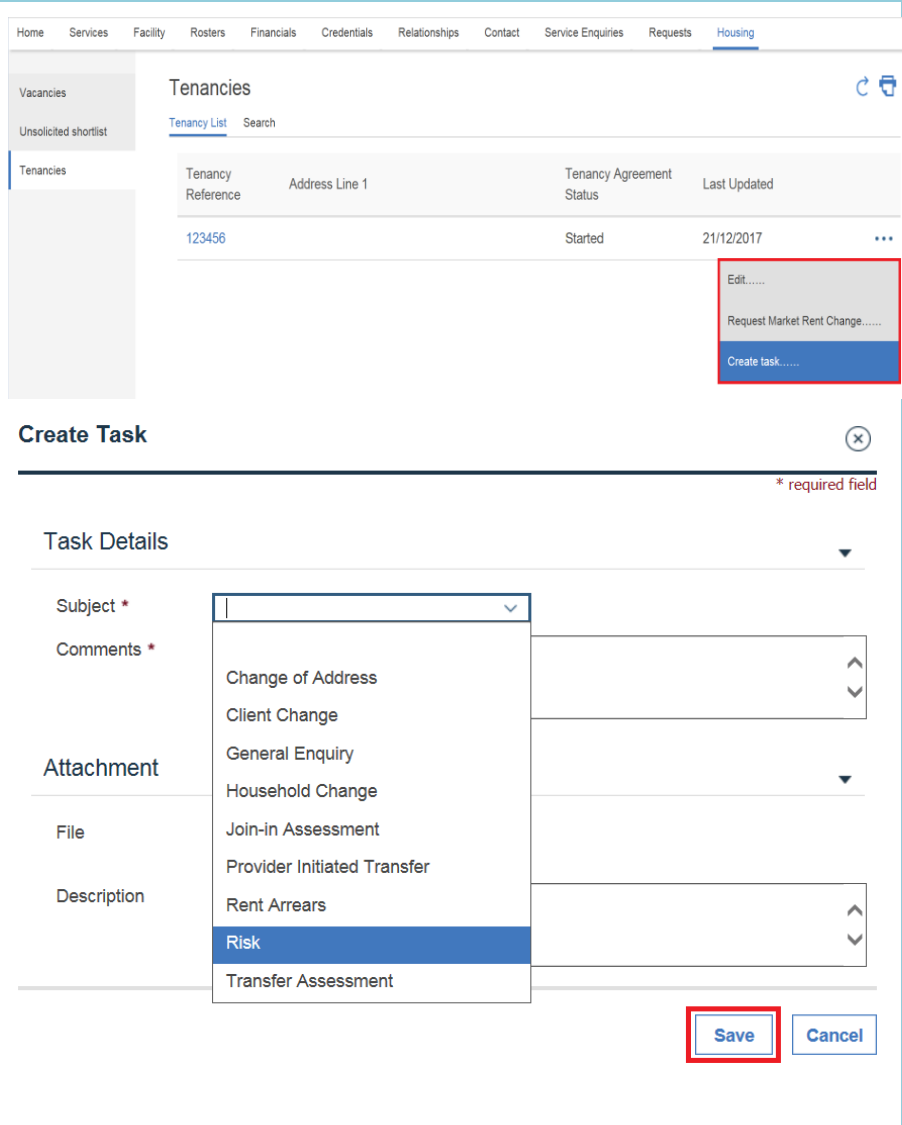
Description	Screenshot
<p><b>Step one</b></p> <p>Navigate to the tenancy by selecting the 'Tenancy Reference' link from the tenancies list and select 'Create task' from the action menu for the tenancy</p> <p>Choose 'Client Change' as the subject</p> <p>Please refer to Appendix B for templates of information to include and select 'Save'</p> <p><b>Note:</b> MSD 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</p>	 <p>The screenshot shows the BOS system interface. At the top, there is a navigation bar with links: Home, Services, Facility, Rosters, Financials, Credentials, Relationships, Contact, Service Enquiries, Requests, and Housing. Below this is a sidebar with links: Vacancies, Unsolicited shortlist, and Tenancies. The main content area shows the 'Tenancies' list with columns: Tenancy Reference, Address Line 1, Tenancy Agreement Status, and Last Updated. A table row shows a tenancy with reference 123456, address line 1, status 'Started', and last updated '21/12/2017'. To the right of this row is an action menu with options: 'Edit.....', 'Request Market Rent Change.....', and 'Create task.....'. The 'Create task.....' option is highlighted with a red box. Below the table is a 'Create Task' form. The form has a title 'Create Task' and a close button. Below the title is a section 'Task Details' with a dropdown arrow. Under 'Task Details', there are fields for 'Subject *' and 'Comments *'. The 'Subject *' field has a dropdown menu open with options: 'Change of Address', 'Client Change' (highlighted), 'General Enquiry', 'Household Change', 'Join-in Assessment', 'Provider Initiated Transfer', 'Rent Arrears', 'Risk', and 'Transfer Assessment'. Below the 'Task Details' section is an 'Attachment' section with fields for 'File' and 'Description'. At the bottom right of the form are 'Save' and 'Cancel' buttons. The 'Save' button is highlighted with a red box.</p>

**Note:** There is a new process for death of a sole signatory for a public housing property where there are occupants still residing in the property. Refer to the 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 MSD of household risk and household member risk information

If there is household risk or household member risk at one of your properties, please tell MSD. 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:

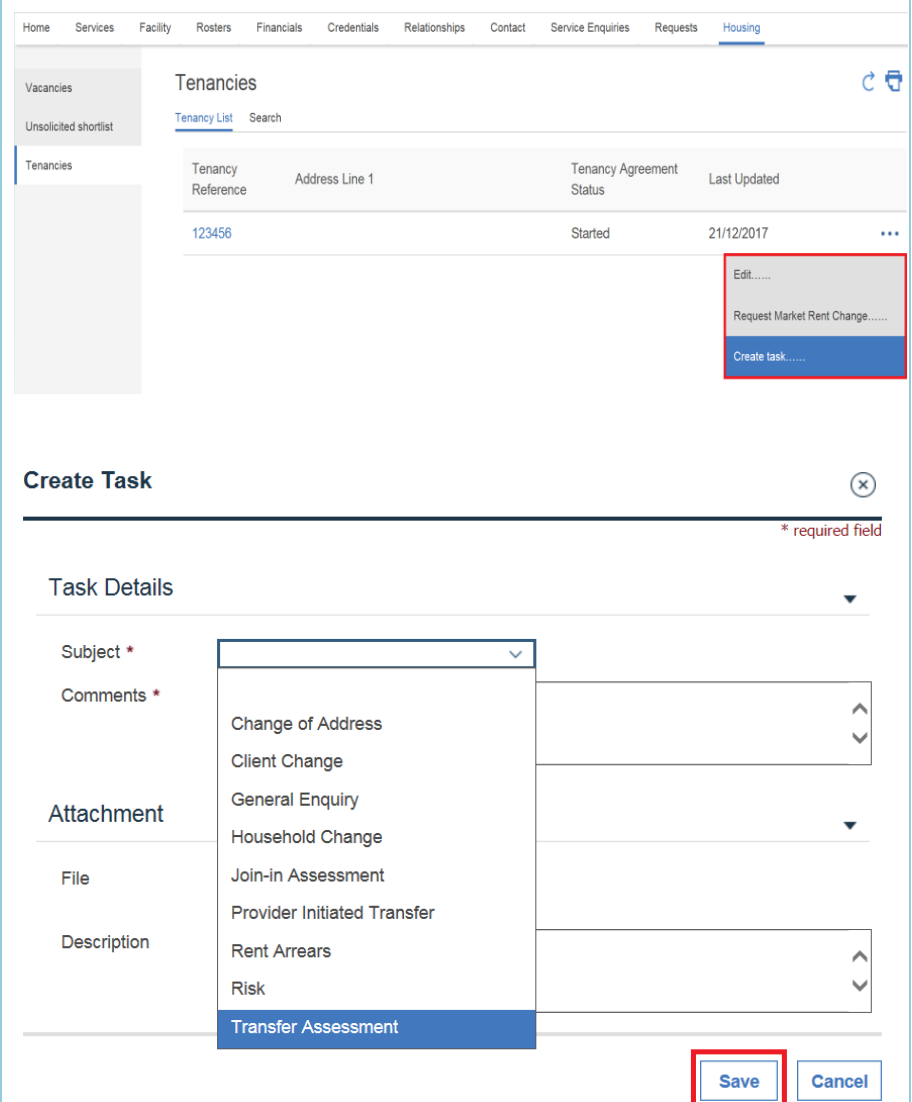
- extreme danger to staff safety
- tenant is physically violent, aggressive, or threatening
- tenant has a history of violent or aggressive or threatening behaviour
- tenant has known convictions for violence
- tenant has intimidated a staff member through written abuse or verbal abuse such as unwelcome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

Description	Screenshot
<p><b>Step one</b></p> <p>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</p> <p>Choose 'Risk' as the subject</p> <p>Please refer to Appendix B for templates of information to include and select 'Save'</p>	 <p>The screenshot shows the MSD system interface. At the top, there is a navigation bar with links: Home, Services, Facility, Rosters, Financials, Credentials, Relationships, Contact, Service Enquiries, Requests, and Housing. Below this is a sidebar with links: Vacancies, Unsolicited shortlist, and Tenancies. The main content area is titled 'Tenancies' and contains a table with columns: Tenancy Reference, Address Line 1, Tenancy Agreement Status, and Last Updated. A single row is visible with Tenancy Reference 123456, Address Line 1, Status Started, and Last Updated 21/12/2017. To the right of this row is an action menu with options: Edit....., Request Market Rent Change....., and Create task...... Below the table is a 'Create Task' form. The form has a 'Task Details' section with a 'Subject' dropdown menu. The dropdown menu is open, showing options: Change of Address, Client Change, General Enquiry, Household Change, Join-in Assessment, Provider Initiated Transfer, Rent Arrears, Risk (highlighted), and Transfer Assessment. At the bottom right of the form are 'Save' and 'Cancel' buttons, with the 'Save' button highlighted by a red box.</p>

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

If you want to move the tenant(s) 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 MSD to have their needs reassessed.

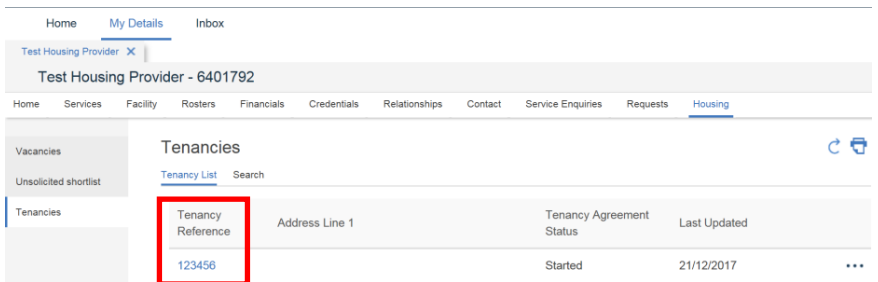
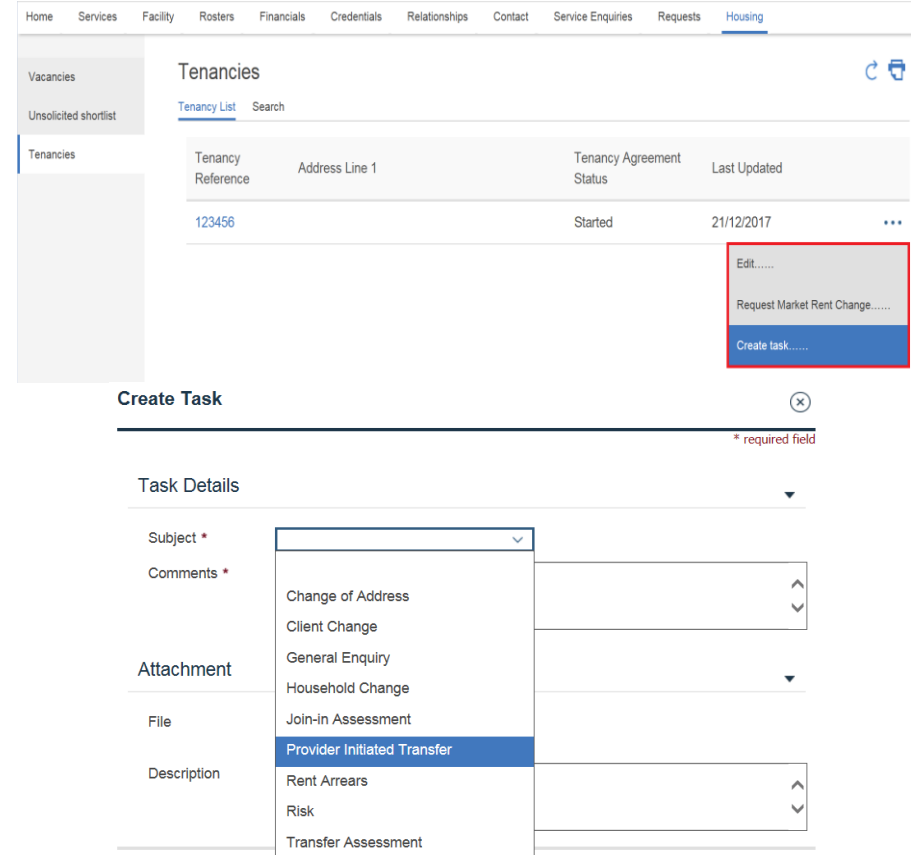
To ask MSD to assess the tenant's housing needs:

Description	Screenshot
<p><b>Step one</b></p> <p>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</p> <p>Choose 'Transfer Assessment' as the subject</p> <p>Please refer to Appendix B for templates of information to include and select 'Save'</p> <p><b>Note:</b> MSD will process the task manually. You will receive a notification once the assessment has been completed</p>	

## Notify MSD and HUD 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 MSD after the following has been completed:

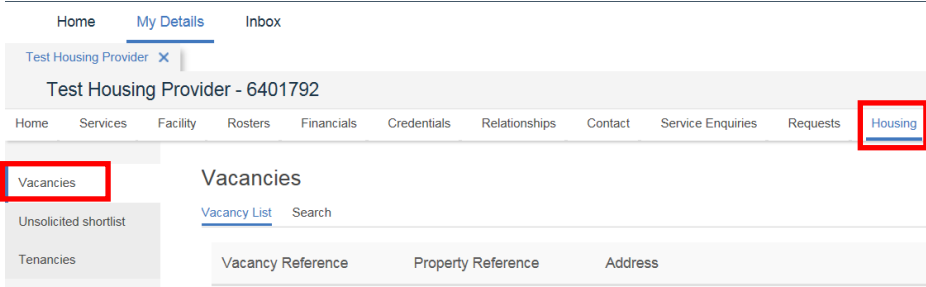
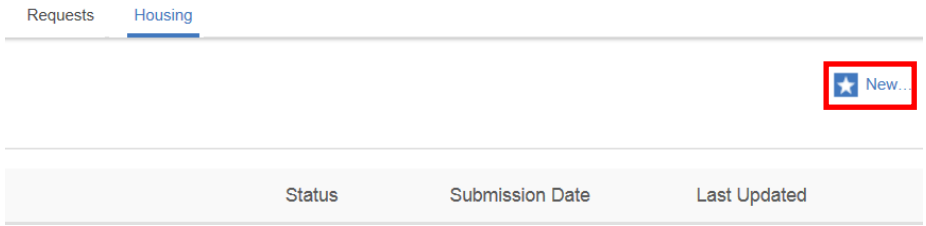
- the tenant's housing needs have been assessed by MSD (where applicable)
- the property you have identified is suitable
- the vacancy for that property has been approved by HUD
- the tenants have signed a tenancy agreement for the new property
- you have a confirmed tenancy start date.

Description	Screenshot
<p><b>Step one</b></p> <p>Locate the tenancy reference for the tenant you wish to transfer</p>	
<p><b>Step two</b></p> <p>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</p> <p>Choose 'Provider Initiated Transfer' as the subject</p>	



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



Description	Screenshot
<b>Step six</b> Select the 'Vacancies' from the left-hand side menu	
<b>Step seven</b> Select 'New' from the 'Vacancy List' screen	



Description	Screenshot
<p><b>Step eight</b></p> <p>Fill in the vacancy details then select 'Next'</p> <p><b>Note:</b> The same unique property reference number must be used each time the property is listed in BOS</p> <p>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</p> <p>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'.</p>	



Description	Screenshot
<p><b>Step nine</b></p> <p>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'</p> <p><b>Note:</b> MSD 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</p>	

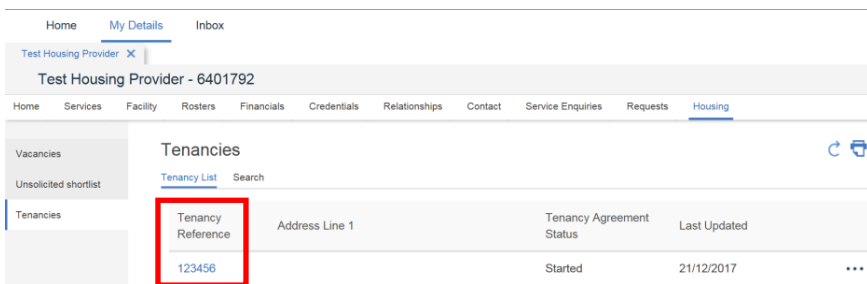


## Notify MSD and HUD that the tenants have been transferred to/from another provider's property

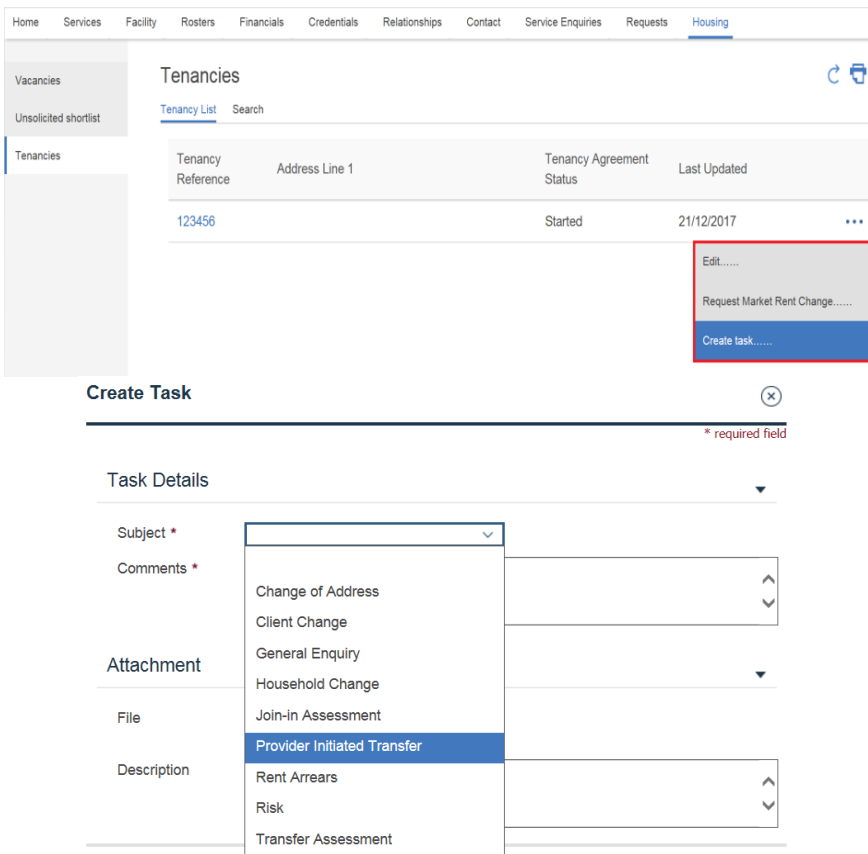
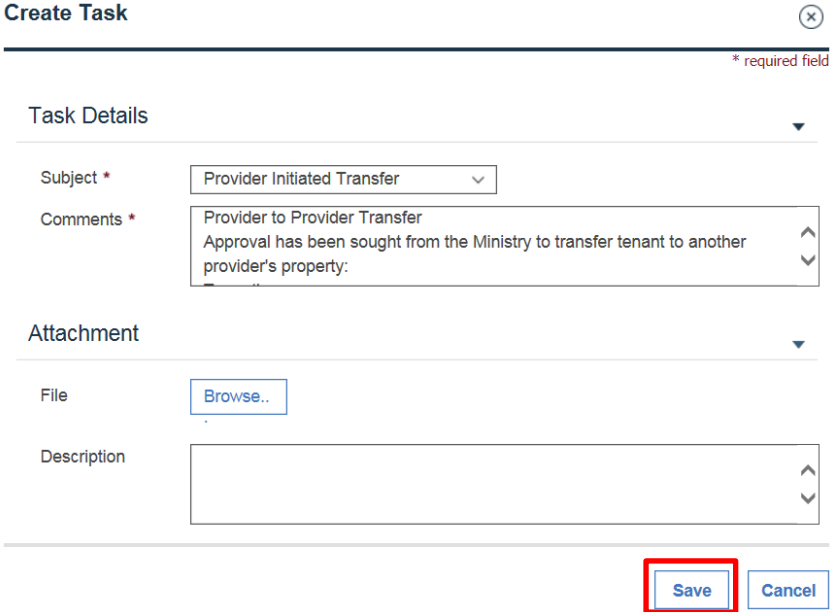
If the tenants move to/from another provider's property, the primary provider (the primary provider is the one transferring the existing tenant to a new provider's property) must submit a Provider to Provider Transfer approval request form to HUD for approval prior to the transfer. You must work collaboratively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

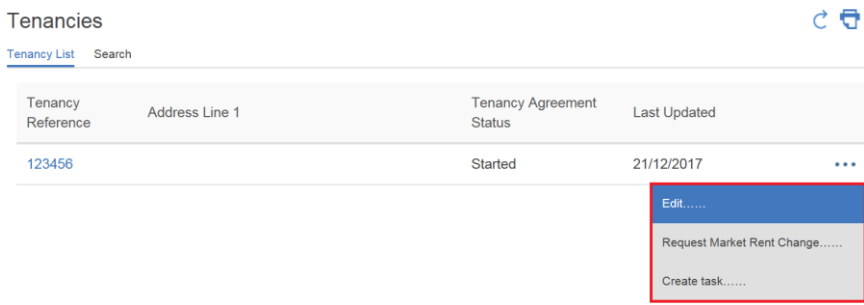
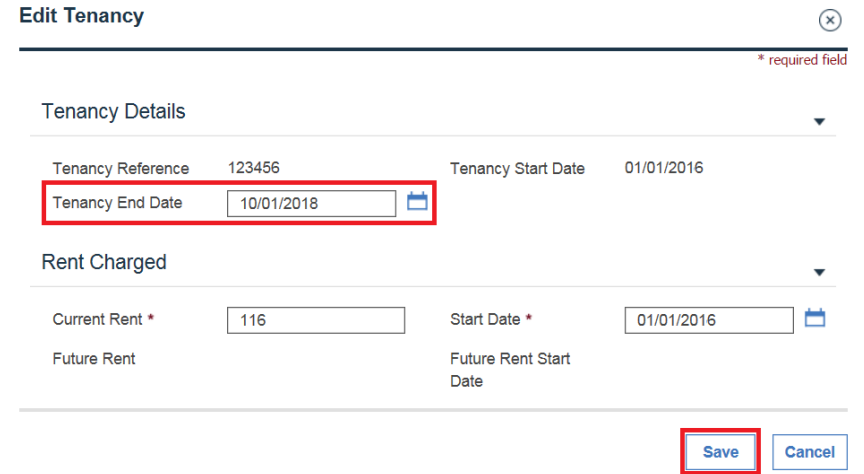
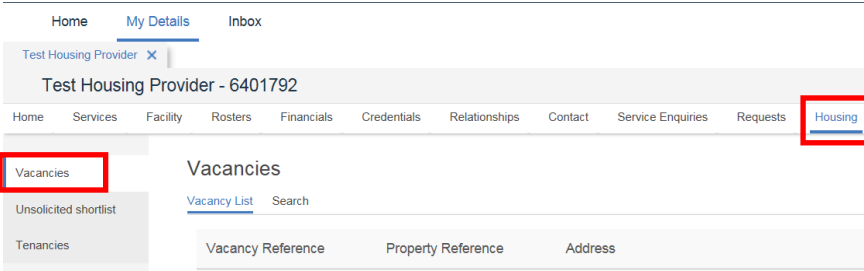
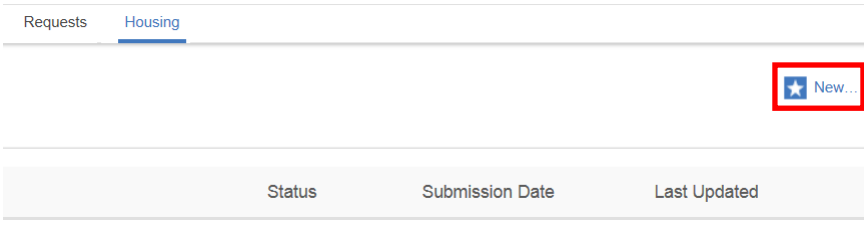
**Note:** Housing New Zealand Corporation do not use BOS.

Description	Screenshot
<b>Step one – PRIMARY PROVIDER ONLY</b> <p>To obtain the approval request form, contact your relationship manager at HUD</p> <p>Complete the Provider to Provider Transfer approval request form, send it through BOS and advise your relationship manager of your upload</p> <p>Refer to Appendix E for more information about uploading documents to MSD and HUD</p>	
<b>Step two – PRIMARY PROVIDER ONLY</b> <p>After HUD has approved the transfer, locate the tenancy reference for the tenant you wish to transfer</p>	



Description	Screenshot
<p><b>Step three – PRIMARY PROVIDER ONLY</b></p> <p>Navigate to the tenancy by selecting the 'Tenancy Reference' link and select 'Create task' from the action menu for the tenancy</p> <p>Choose 'Provider Initiated Transfer' as the subject</p>	 <p>The screenshot shows the 'Tenancies' page with a table listing tenancies. The first tenancy has a reference of 123456 and a status of 'Started'. An action menu is open for this tenancy, showing options like 'Edit', 'Request Market Rent Change', and 'Create task'. The 'Create task' option is highlighted. Below this, the 'Create Task' form is shown with a dropdown menu for 'Subject' where 'Provider Initiated Transfer' is selected.</p>
<p><b>Step four – PRIMARY PROVIDER ONLY</b></p> <p>Refer to Appendix B for a 'Provider to Provider Transfer' template.</p> <p>Complete the template to include, attach a file as supporting information if required and select 'Save'</p>	 <p>The screenshot shows the 'Create Task' form with the 'Provider Initiated Transfer' template filled out. The 'Subject' is 'Provider Initiated Transfer' and the 'Comments' field contains the template text: 'Provider to Provider Transfer Approval has been sought from the Ministry to transfer tenant to another provider's property:'. The 'Save' button is highlighted.</p>



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



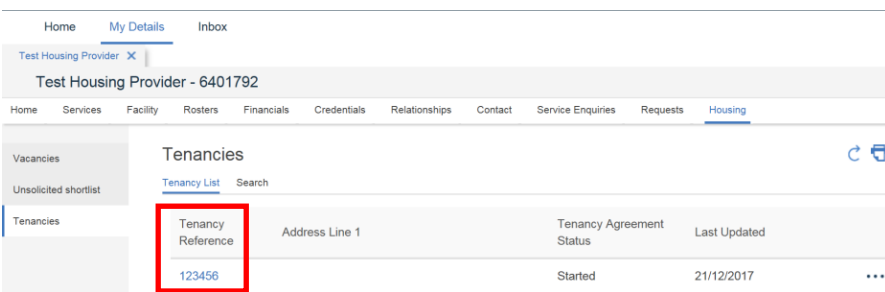
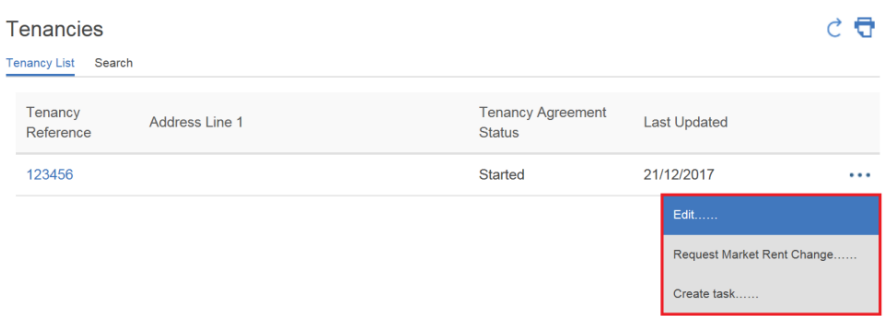
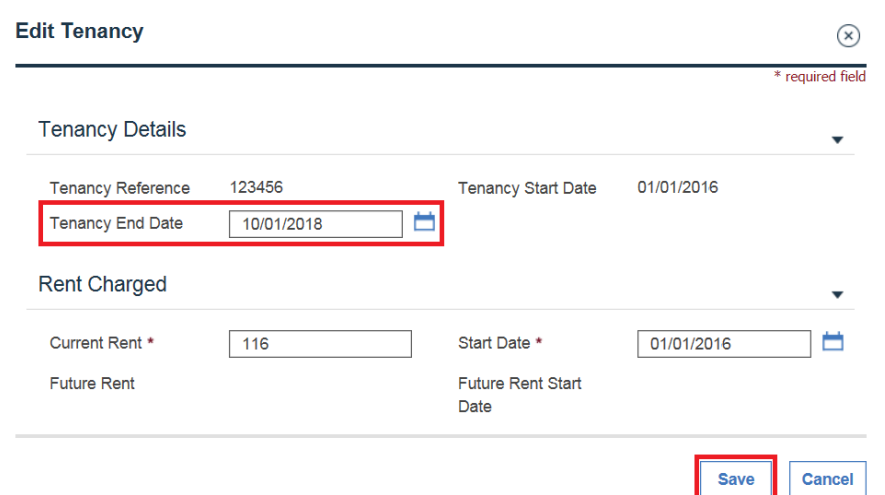
Description	Screenshot
<p><b>Step nine – NEW PROVIDER ONLY</b></p> <p>Fill in the vacancy details then select 'Next'</p> <p><b>Note:</b> The same unique property reference number must be used each time the property is listed in BOS</p> <p>If any of the mandatory fields are left blank, error messages will display at the top of the 'Submit Vacancy' screen. Otherwise the 'Suitable Tenant Characteristics' screen displays</p> <p>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'.</p>	



Description	Screenshot
<p><b>Step ten – NEW PROVIDER ONLY</b></p> <p>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’</p> <p><b>Note:</b> MSD 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</p>	<p>The screenshot shows the 'Submit Vacancy' form with the following details:</p> <ul style="list-style-type: none"><li><b>Section 1: Vacancy Details</b> (active)</li><li><b>Section 2: Suitable Tenant Characteristics</b></li><li><b>Step 2: Enter Request Referral Requirements &amp; Suitable Tenant Characteristics</b></li><li><b>Request Referral Requirements</b><ul style="list-style-type: none"><li><b>Vacancy For *</b>: Transfer (highlighted with a red box)</li><li><b>View Clients Previously Set to Unsuitable</b>: <input type="checkbox"/></li><li><b>View Clients Previously Set to Declined/Withdrawn</b>: <input type="checkbox"/></li></ul></li><li><b>Identified Suitable Client Details</b><ul style="list-style-type: none"><li><b>Client Given Name</b>: [text input]</li><li><b>Client Family Name</b>: [text input]</li><li><b>Date of Birth</b>: [date input]</li><li><b>Client Number</b>: [text input]</li><li><b>Reason</b>: [dropdown menu]</li></ul></li><li><b>Transfer Details</b><ul style="list-style-type: none"><li><b>Tenancy Reference Number</b>: 123456 (highlighted with a red box)</li></ul></li><li><b>Buttons</b>: Cancel, Back, Finish (highlighted with a red box)</li></ul>

## Notify MSD that the tenancy has ended

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

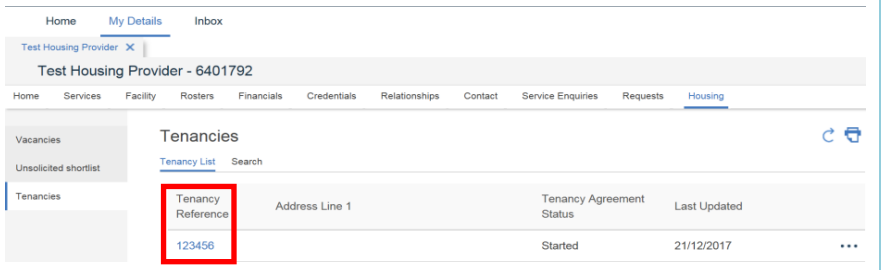
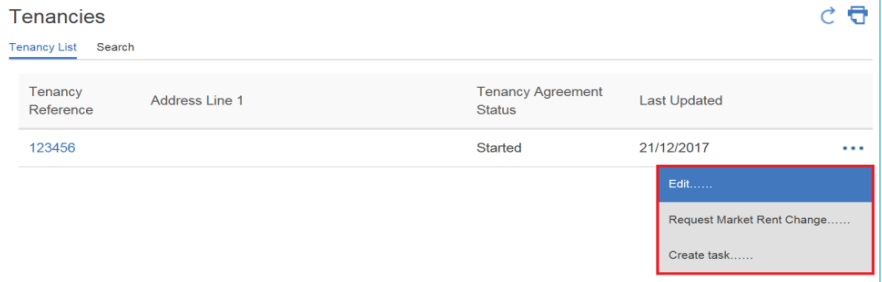
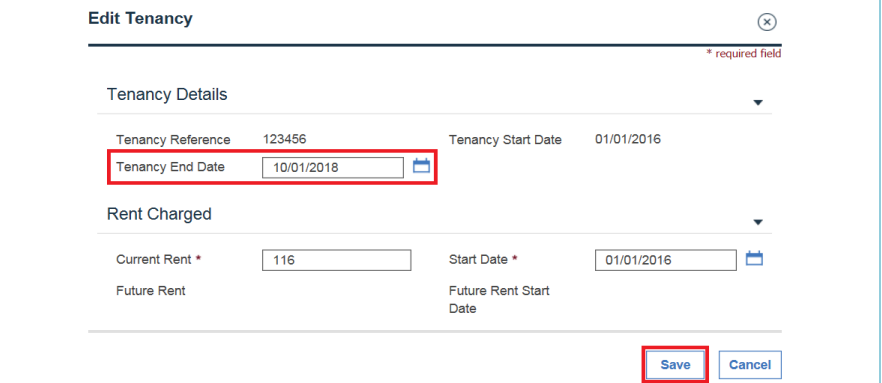
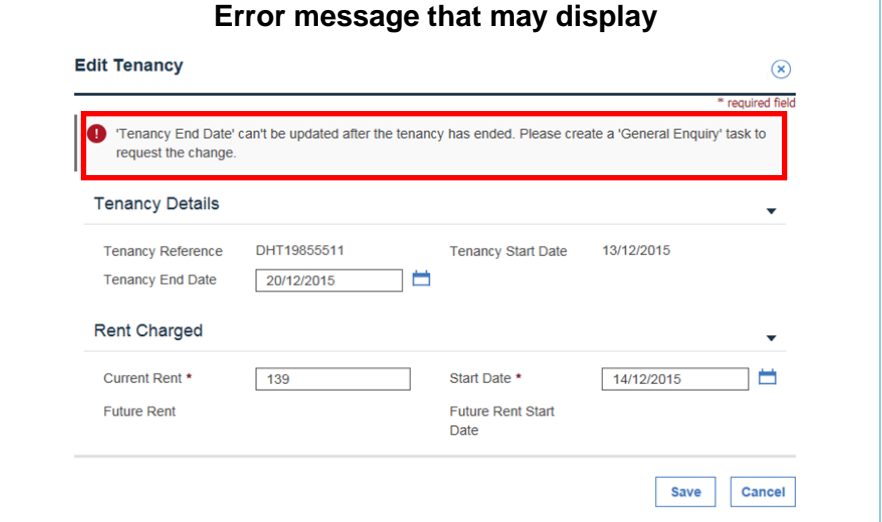
Description	Screenshot
<p><b>Step one</b></p> <p>Navigate to the tenancy by selecting the 'Tenancy Reference' link from the tenancies list</p>	
<p><b>Step two</b></p> <p>Select 'Edit' from the action menu</p>	
<p><b>Step three</b></p> <p>Enter the last day that you charged rent in the 'Tenancy End Date' field</p>	

You are able to list this property as a new vacancy once you have confirmed the date the property will be available. However the same unique property reference number must be used each time the property is listed in BOS.

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](mailto:GNL_Provider_Support@msd.govt.nz) to request an urgent processing for a reinstatement of the tenancy.

## Advise MSD of correction to the tenancy end date

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

Description	Screenshot
<p><b>Step one</b></p> <p>Navigate to the tenancy by selecting the 'Tenancy Reference' link from the tenancies list</p>	
<p><b>Step two</b></p> <p>Select 'Edit' from the action menu</p>	
<p><b>Step three</b></p> <p>Fix the tenancy end date</p> <p><b>Note:</b> If an error message displays you will need to create a general enquiry task instead</p>	 <p><b>Error message that may display</b></p> 

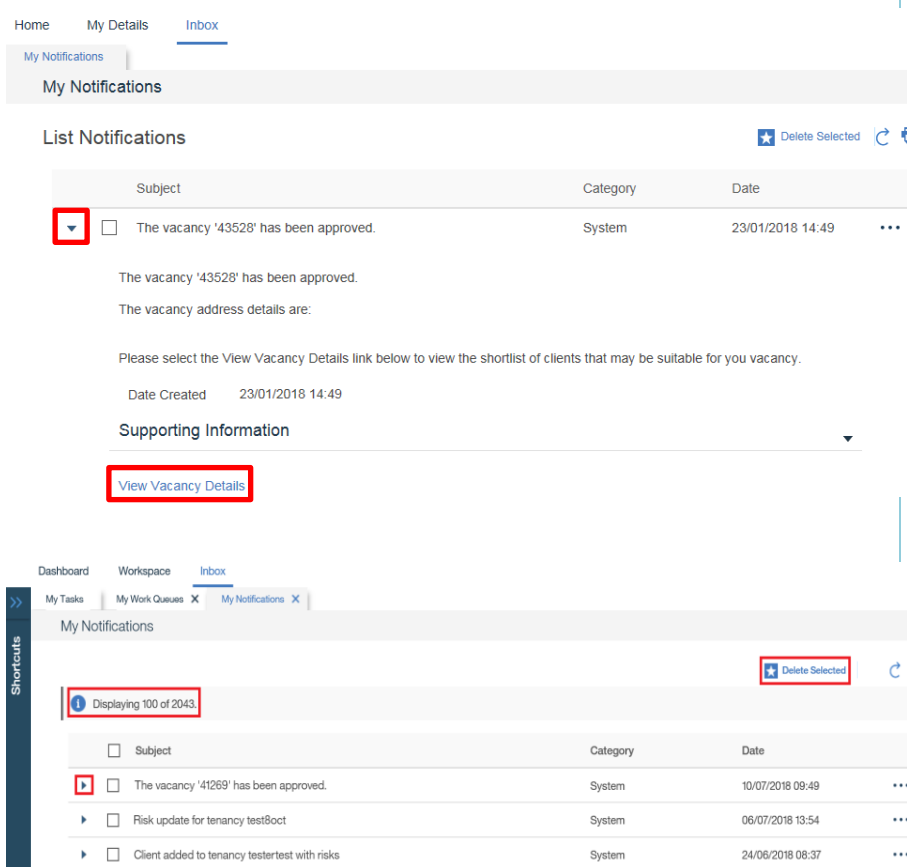
## Part 4: Notifications – ADMINISTRATOR ONLY

### Receive notification

If you have an Administrator role, you will receive an email when notifications are sent through from MSD and HUD.

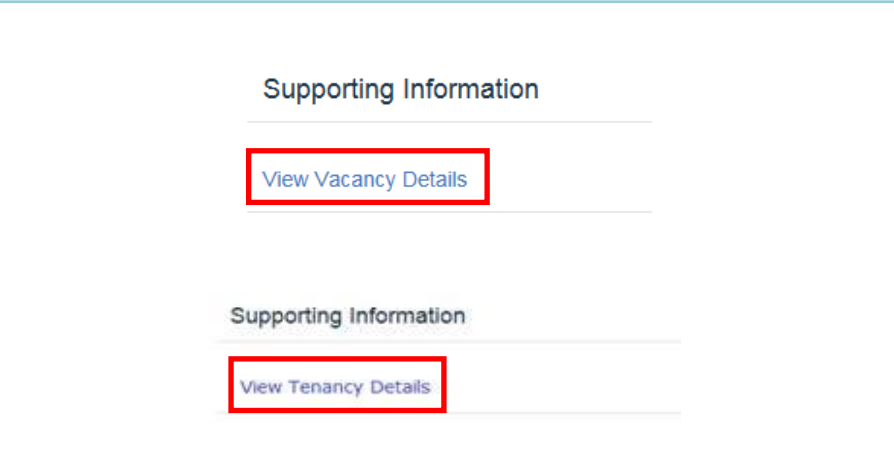
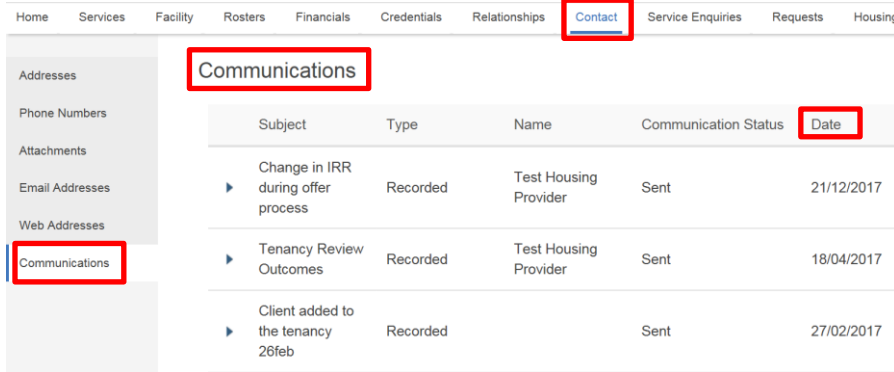
'My Notifications' work the same way as an email inbox – that is each notification generated for a provider is sent to each user.

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

Description	Screenshot
<p><b>Step one</b></p> <p>Expand the message by selecting the arrow to the side of the subject line and read the notification</p> <p>By selecting the 'View Vacancy Details' link from within the notification, you will be able to view the vacancy</p> <p>The types of notifications you may receive include:</p> <ul style="list-style-type: none"> <li>• Vacancy related (approved, declined, cancelled)</li> <li>• Referral request</li> <li>• Unsolicited shortlist</li> <li>• IRR review</li> <li>• Market Rent changes</li> </ul>	 <p><b>Note:</b> 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'.</p>

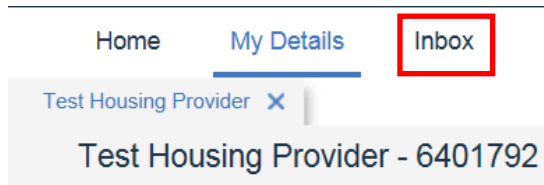
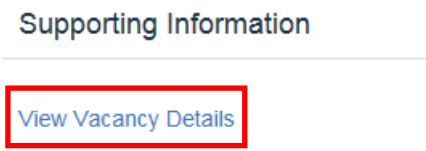




Description	Screenshot
<p><b>Step two</b></p> <p>Some notifications will provide additional links under supporting information such as:</p> <ul style="list-style-type: none"> <li>• 'View Vacancy'</li> <li>• 'View Tenancy Details'</li> </ul> <p>You can select the link to navigate to the supporting information e.g. vacancy or tenancy details</p>	
	 <p><b>Note:</b> Once you have completed the action for the notification, you may delete the notification if you wish.</p> <p>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.</p>
<p>Other notifications may include:</p> <ul style="list-style-type: none"> <li>• Decline reason – review the decline reason, and if required, re-submit the vacancy, by navigating back to the property and update the relevant details</li> <li>• 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</li> <li>• Rent changes – navigate to the tenancy and start your rent change process if appropriate (decreases need to be administered immediately in BOS but IRR increases are not required to be administered in BOS until seven days prior to the effective date)</li> <li>• Tenancy management – refer to part three of this user guide.</li> </ul>	

## Receive a request for information about rent arrears

MSD 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
<p><b>Step one</b></p> <p>Once you have read your email, log into BOS and select 'Inbox'</p> <p>Navigate to the notification and read the details</p>	
<p><b>Step two</b></p> <p>Selecting the 'View Tenancy Details' link in the notification you will be able to view the tenancy</p>	
<p><b>Step three</b></p> <p>Check the tenant's rent account to see if there are any rent arrears owing for the specified refund period</p> <p><b>Note:</b> This information will be found within your own records, separate from BOS and you may be asked to provide a screenshot of the rent changes by MSD</p>	
<p><b>Step four</b></p> <p>Complete the 'Request for rent arrears information form'. If there are no rent arrears for the specified refund period, write 'No arrears'</p>	
<p><b>Step five</b></p> <p>Notify MSD of any rent arrears owing. Refer to 'Advise MSD about the amount of rent arrears owed' in Part 3 –Tenancy Management</p>	

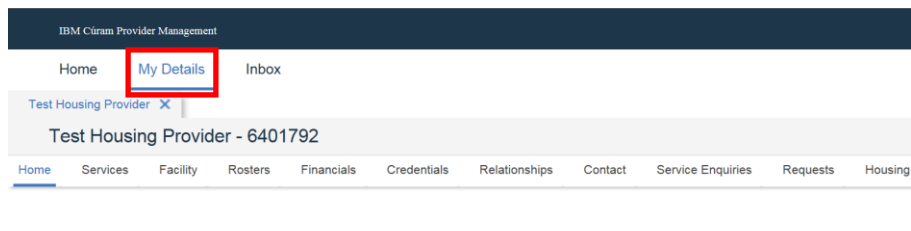
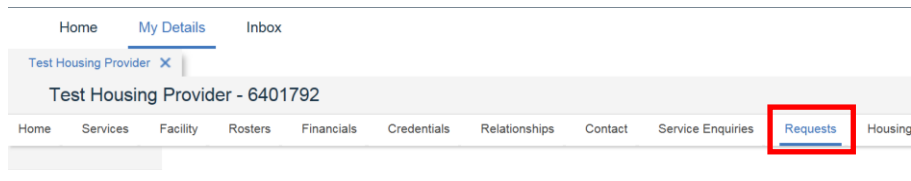
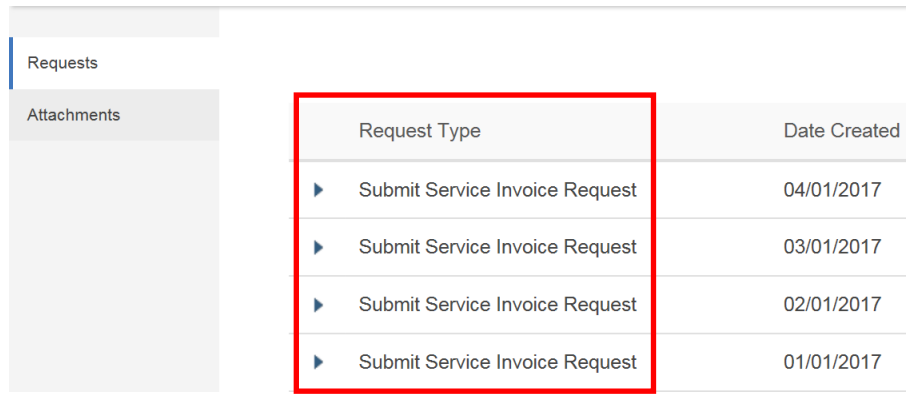
## Part 5: Financial Management – FINANCIAL ADMINISTRATOR ONLY

### 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 MSD 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 administered prior to reconciliation.

Description	Screenshot										
<b>Step one</b> Log into BOS and select 'My Details'											
<b>Step two</b> Select the 'Requests' tab											
<b>Step three</b> Locate the 'Service Invoice Request' you want to view	 <table border="1"> <thead> <tr> <th>Request Type</th><th>Date Created</th></tr> </thead> <tbody> <tr> <td>▶ Submit Service Invoice Request</td><td>04/01/2017</td></tr> <tr> <td>▶ Submit Service Invoice Request</td><td>03/01/2017</td></tr> <tr> <td>▶ Submit Service Invoice Request</td><td>02/01/2017</td></tr> <tr> <td>▶ Submit Service Invoice Request</td><td>01/01/2017</td></tr> </tbody> </table>	Request Type	Date Created	▶ Submit Service Invoice Request	04/01/2017	▶ Submit Service Invoice Request	03/01/2017	▶ Submit Service Invoice Request	02/01/2017	▶ Submit Service Invoice Request	01/01/2017
Request Type	Date Created										
▶ Submit Service Invoice Request	04/01/2017										
▶ Submit Service Invoice Request	03/01/2017										
▶ Submit Service Invoice Request	02/01/2017										
▶ Submit Service Invoice Request	01/01/2017										

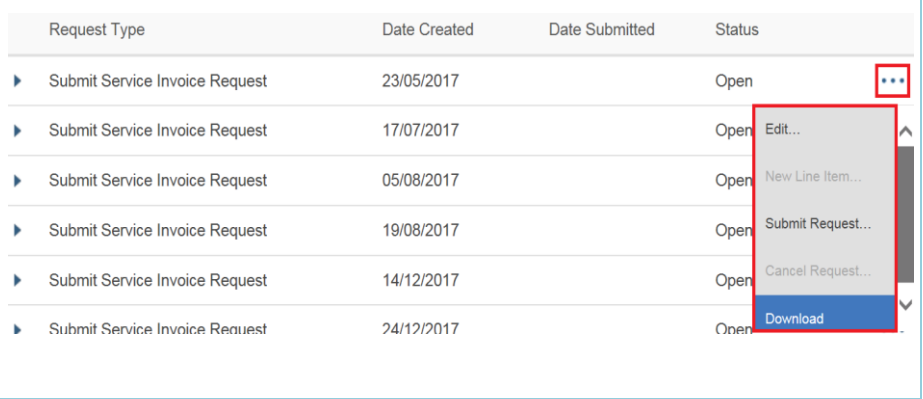
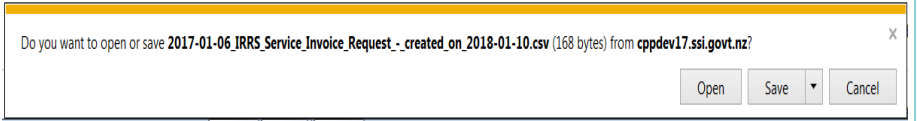


Description	Screenshot
<p><b>Step four</b></p> <p>Expand it to view the home tab</p>	
<p><b>Step five</b></p> <p>Navigate to the 'Line Items' tab to view the IRRS amounts for each tenancy</p>	
<p><b>Step six</b></p> <p>Expand to view the individual line item</p> <p>Descriptions as below:</p> <p>External Reference: Tenancy Reference</p> <p>Service Date From: Start date of the invoice</p> <p>Service Date To: End date of the invoice</p> <p>Number of Units: Number of days to be invoiced</p> <p>Unit Amount: IRRS as a daily amount (e.g. Market Rent minus IRR divided by 7)</p> <p>Amount Invoiced: Number of Units x Unit Amount (e.g. the IRRS amount the CHP can invoice)</p>	

## Download an IRRS fortnightly schedule

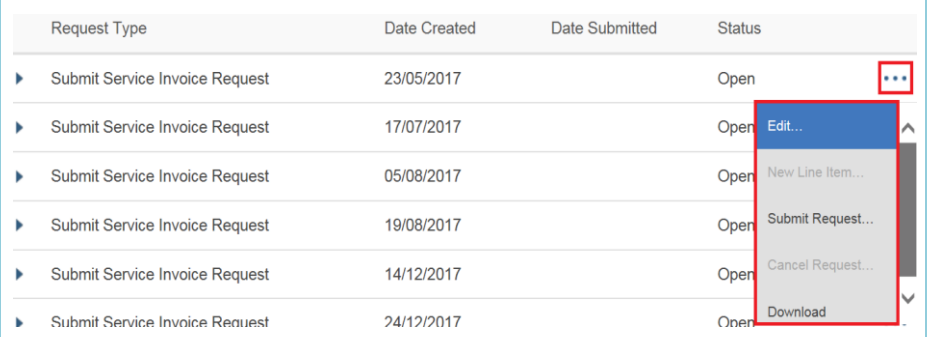
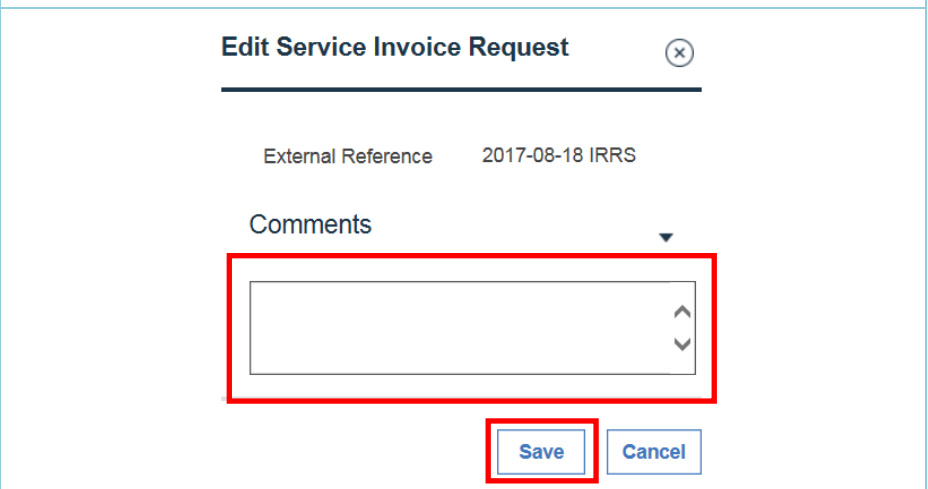
If you have a financial administrator role you can also download Service Invoice Requests for analysis. You may review the schedule any time within the fortnightly invoicing period. If you notice any anomalies, contact your relationship manager at HUD.

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

Description	Screenshot
<p><b>Step one</b></p> <p>Log into BOS and select 'My Details'</p> <p>Navigate to the 'Requests' tab, locate the 'Service Invoice Request' you want to view and select 'Download' from the action menu</p>	 <p>The screenshot shows a table with columns: Request Type, Date Created, Date Submitted, and Status. The table contains six rows of 'Submit Service Invoice Request' entries. The 'Status' column for the first row is 'Open'. A red box highlights the three-dot menu icon in the 'Status' column of the first row. A second red box highlights the 'Download' option in the dropdown menu that appears.</p>
<p><b>Step two</b></p> <p>Select 'Open' to view the invoice in Excel or select 'Save'/'Save As' to save the file in a secure location</p>	<p>The following options will display at the bottom of the screen</p>  <p>The screenshot shows a file download dialog box with the text: 'Do you want to open or save 2017-01-06_IRRS_Service_Invoice_Request - created_on_2018-01-10.csv (168 bytes) from cppdev17.ssi.govt.nz?'. The 'Open' button is highlighted.</p>

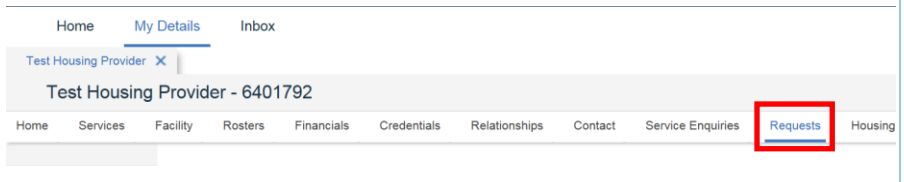
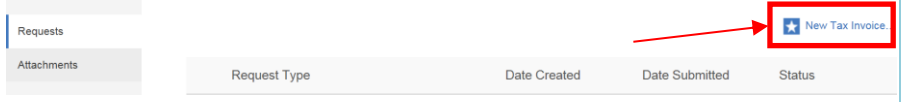

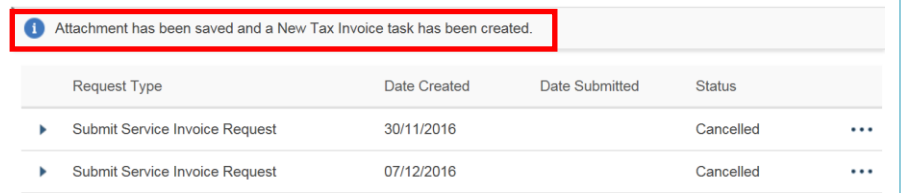
## Comment on an IRRS fortnightly schedule

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:

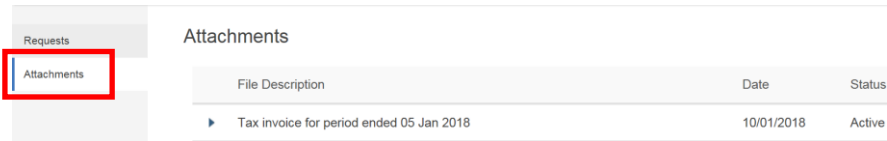
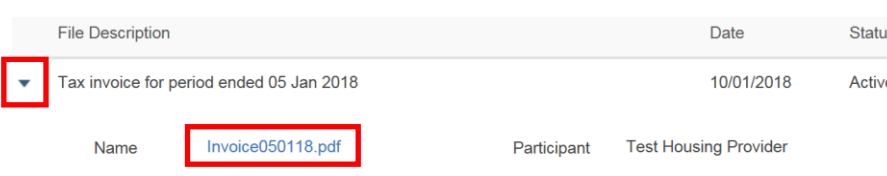
Description	Screenshot
<p><b>Step one</b></p> <p>Log into BOS and select 'My Details'</p> <p>Navigate to the 'Requests' tab, locate the 'Service Invoice Request' you want to comment and select 'Edit' from the action menu</p>	
<p><b>Step two</b></p> <p>Add your comment in the 'Comments' field and select 'Save'</p>	

## Upload an IRRS schedule and tax invoice

Once you have confirmed the Service Invoice Request, upload your IRRS schedule and tax invoice as an attachment so that your organisation can get paid the IRRS by HUD. Please make sure your invoice conforms to HUD's minimum invoicing standards. If you are not sure, contact your relationship manager at HUD.

Description	Screenshot												
<b>Step one</b> Log into BOS, select 'My Details' and navigate to the 'Requests' tab													
<b>Step two</b> Select 'New Tax Invoice'													
<b>Step three</b> 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'  <b>Note:</b> 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	 <b>Note:</b> File name and description will display, please make them useful and meaningful to you.												
A notification will display on screen to confirm that the attachment has been saved	 <table><thead><tr><th>Request Type</th><th>Date Created</th><th>Date Submitted</th><th>Status</th></tr></thead><tbody><tr><td>▶ Submit Service Invoice Request</td><td>30/11/2016</td><td></td><td>Cancelled</td></tr><tr><td>▶ Submit Service Invoice Request</td><td>07/12/2016</td><td></td><td>Cancelled</td></tr></tbody></table>	Request Type	Date Created	Date Submitted	Status	▶ Submit Service Invoice Request	30/11/2016		Cancelled	▶ Submit Service Invoice Request	07/12/2016		Cancelled
Request Type	Date Created	Date Submitted	Status										
▶ Submit Service Invoice Request	30/11/2016		Cancelled										
▶ Submit Service Invoice Request	07/12/2016		Cancelled										



Description	Screenshot
To view the uploaded invoice, select the 'Attachments' tab	
Expand the file description to view the file name  Select the name of the file to view what you have uploaded	

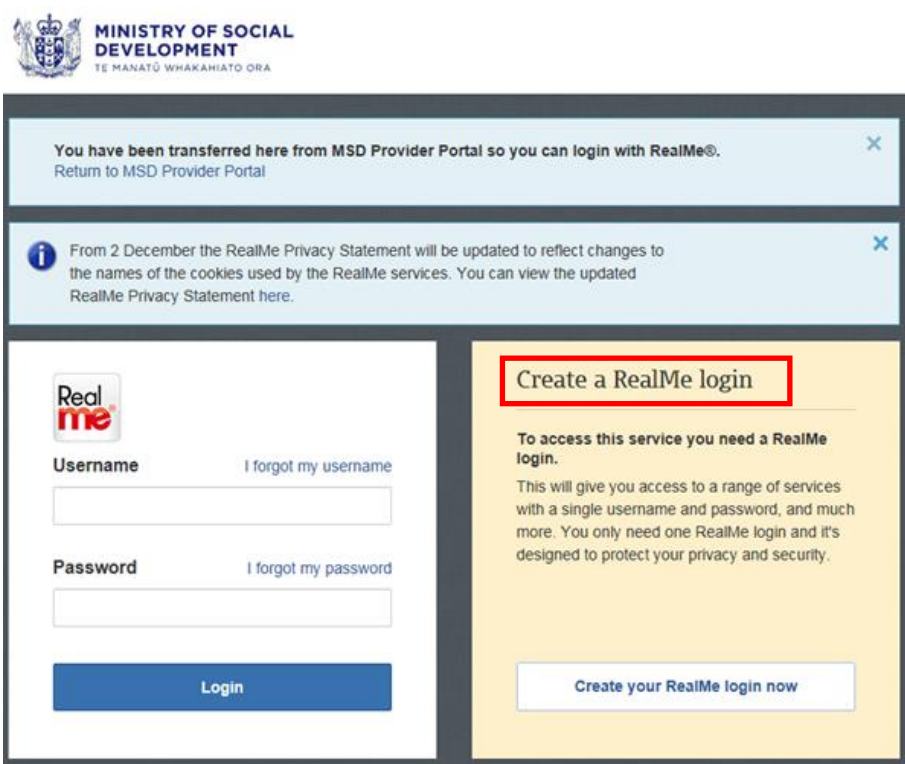


## Appendix A ~ How to login

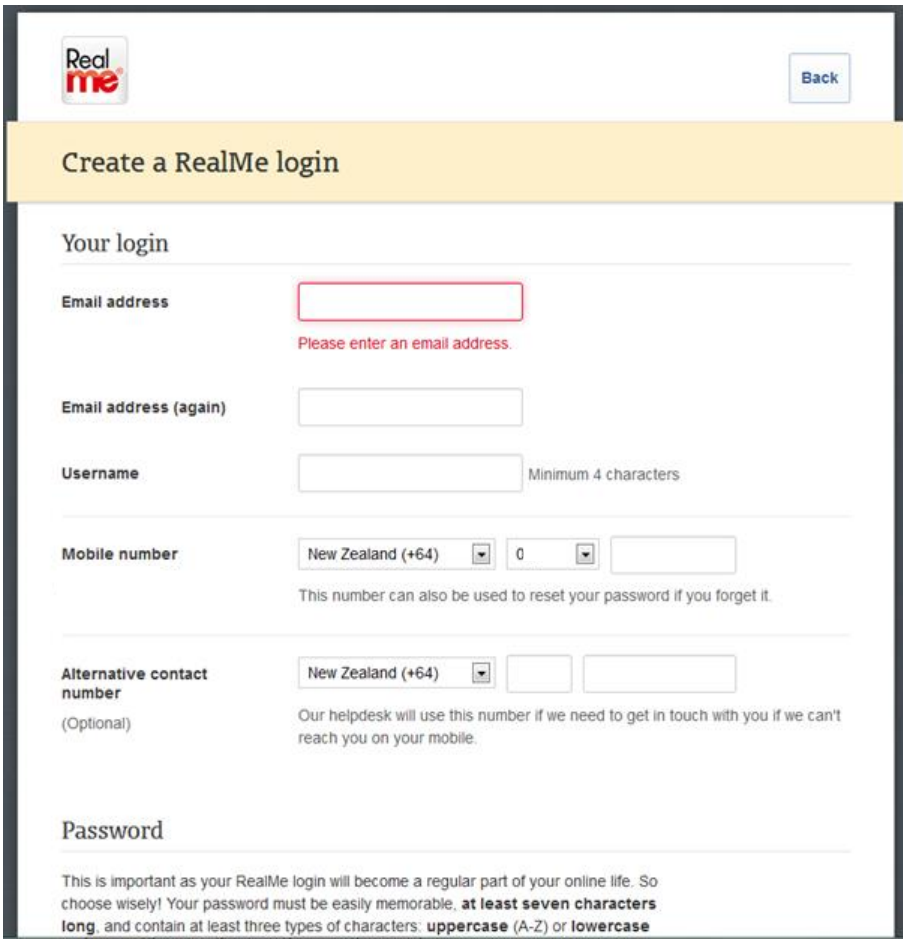
### Setting up a RealMe account

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.

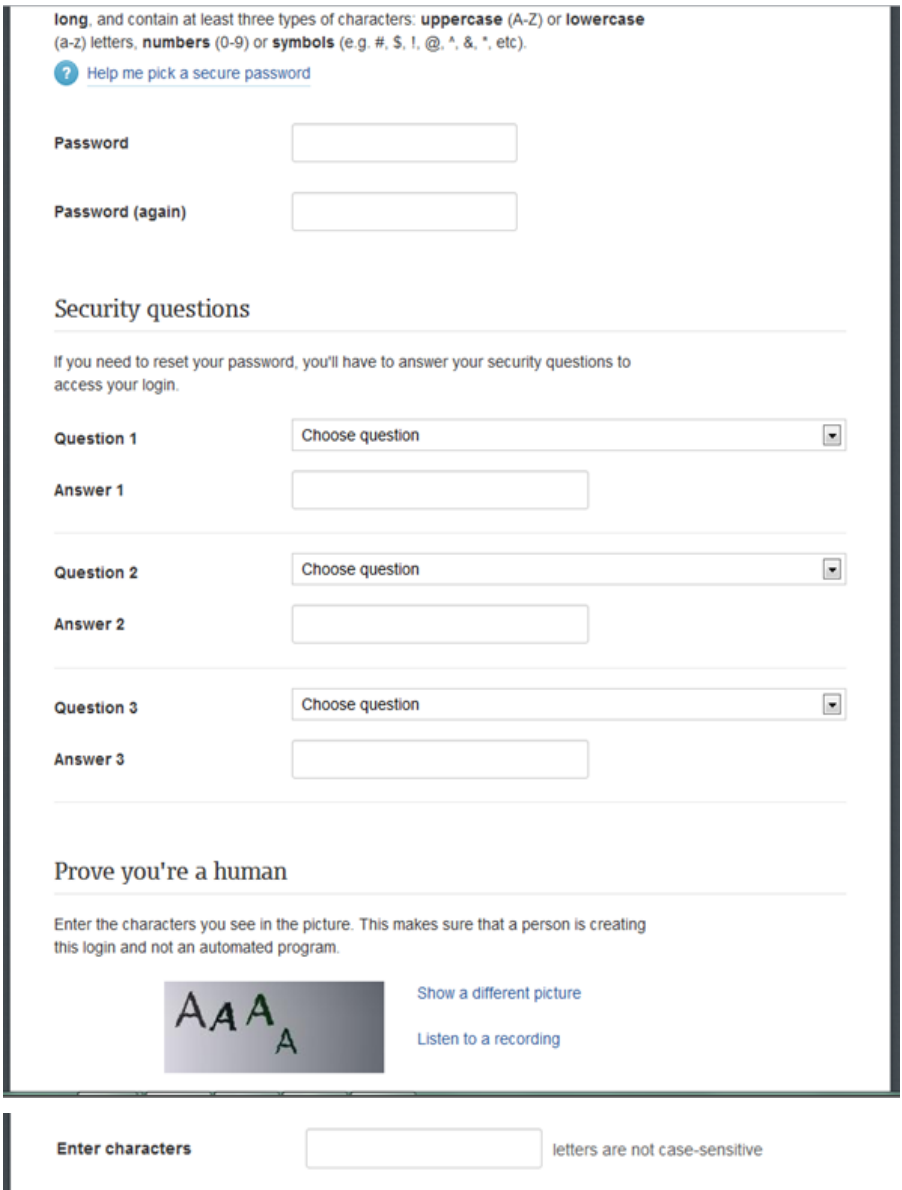
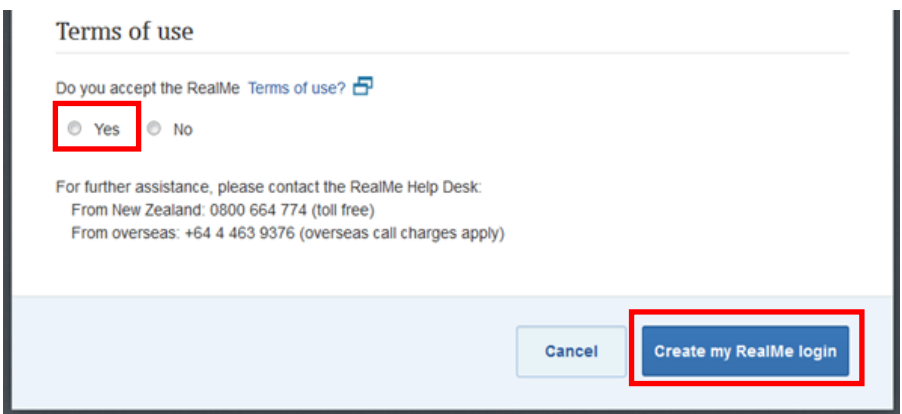
**Note:** You can use an existing RealMe account if you already have one.

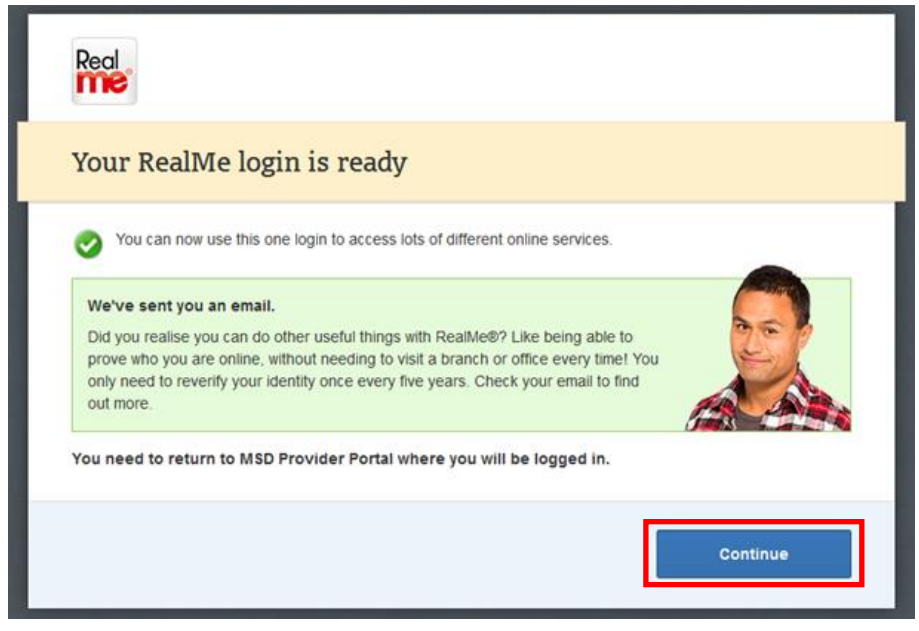
Description	Screenshot
<p><b>Step one</b></p> <p>To create a RealMe account click on the 'Create your RealMe login now' link</p>	



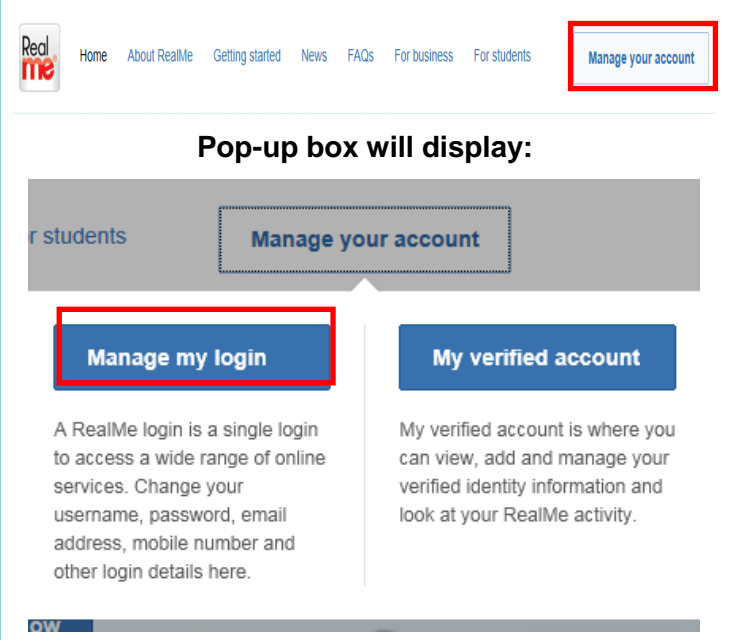
Description	Screenshot
<p><b>Step two</b></p> <p>Follow the prompts to enter:</p> <ul style="list-style-type: none"> <li>• ‘Email address’ – this will be the email address that is directly associated with your RealMe account</li> <li>• ‘Username’ – this can be personalised. You will be prompted to change this if the username you enter is already in use</li> <li>• ‘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</li> <li>• ‘Alternative contact number’</li> </ul>	

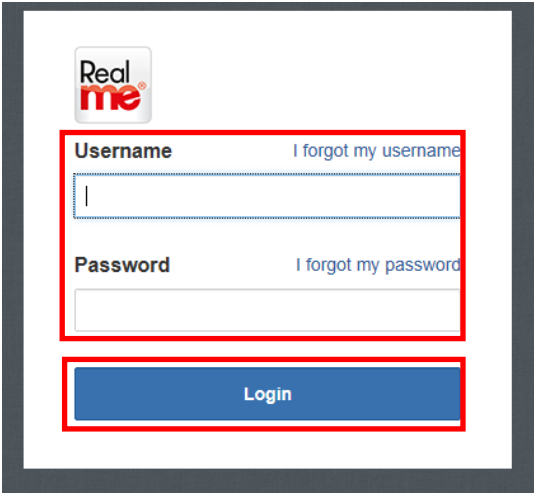
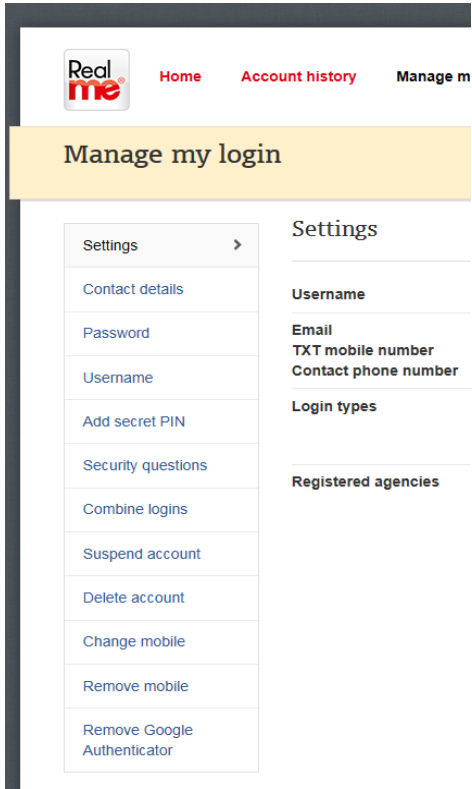


Description	Screenshot
<p><b>Step two, continued</b></p> <p>Continue following the prompts to enter:</p> <ul style="list-style-type: none"> <li>password – guidelines are included</li> <li>security question details</li> <li>the characters shown in the picture</li> </ul>	
<p><b>Step three</b></p> <p>Accept the RealMe terms of use by selecting the 'Yes' radio button.</p> <p>Once you have entered all of your information by answering each question, click 'Create my RealMe login'</p>	

Description	Screenshot
<p><b>Confirmation</b></p> <p>Once you have successfully created your RealMe account, the following message will display</p> <p>Select 'Continue' to return to Business Online Services</p>	

## Managing your RealMe account (including changing your password)

Description	Screenshot
<p><b>Step one</b></p> <p>Go to the RealMe Manage My Login page by entering the following URL into the address bar of your browser: <a href="http://www.realme.govt.nz">www.realme.govt.nz</a></p> <p>Select 'Manage your account' and when the pop-up box displays, select 'Manage my login'</p>	

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

## Appendix B ~ Business Online Services Templates

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We have provided you with some templates that you can use when contacting MSD via BOS. When contacting MSD 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)*

Tenant name:

Client number:

Date of birth:

Reason for change:

### **Client Change**

Tenant 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 and longer-term hospitalisation or residential care, death]*

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:

(Where the only remaining occupant(s) are under the age of 18 or require a caregiver)

Prospective tenant name:

Current Public Housing tenant: Yes/No

If yes, Tenancy Reference:

Date of birth:

Client number:

Contact number:

Relationship to signatory:

Comments:

### **General Enquiry**

Tenant name:

Date of birth:

Contact number:

Enquiry:

Comments:

### **Household Change**

Tenant 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 client is now a tenant]*

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 signatory(s). Their prospective tenant's details are shown below.

#### **Details of Current Signatory(s)**

Tenant name:

Date of birth:

Client number:

Contact number:

#### **Details of each Prospective Tenant**

Full name:

Date of Birth:

Client number (if known):

Contact number:

Current Address:

Relationship to the current signatory:

Signatory to the tenancy agreement: Yes/No

Any other relevant information:

### **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)

### **Provider Initiated Transfer**

Tenant 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:

### **Provider to Provider Transfer**

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

Tenant 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**

Tenant name:

Rent amount per week:

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

### **Rent Arrears Redirection**

Tenant name:

Rent owed:

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

**Risk** *Please refer to 'Advise MSD 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 name:

Client number:

Date of birth:

Contact number:

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

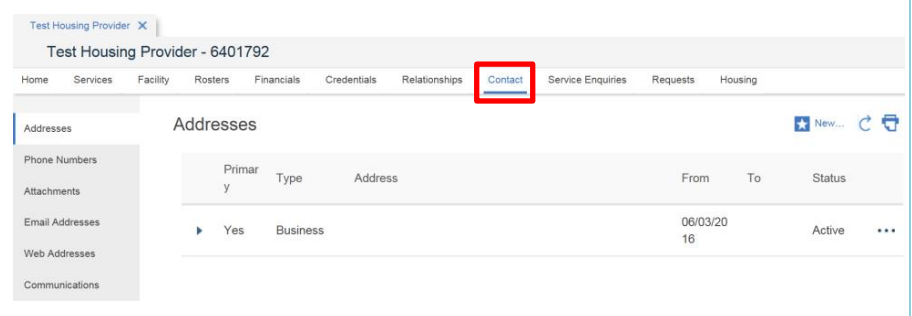
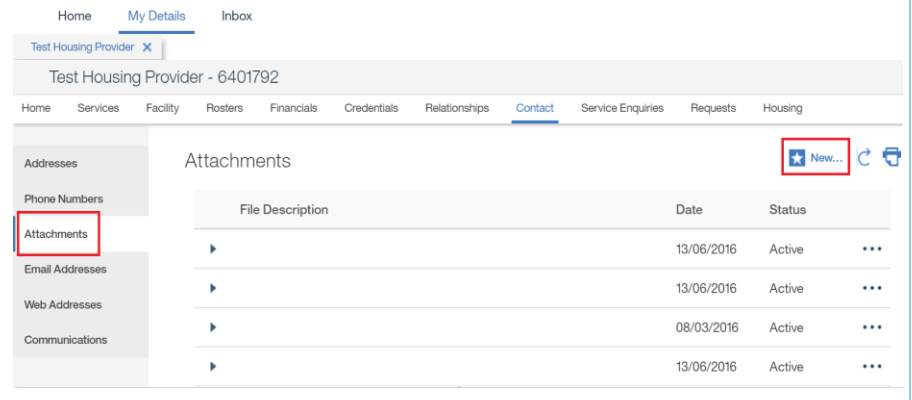
## Appendix C ~ Public Housing matching rules

Public housing matching rules	
A public 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	<p>If the property is not modifiable, clients requiring modifications will not be matched.</p> <p>If the property is modifiable, all clients will be matched.</p> <p>If the property is modified:</p> <ul style="list-style-type: none"> <li>• Clients requiring the exact modifications will be given first priority.</li> <li>• Clients requiring any modifications will be given second priority.</li> <li>• All other clients will be given third priority.</li> </ul>
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, 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.

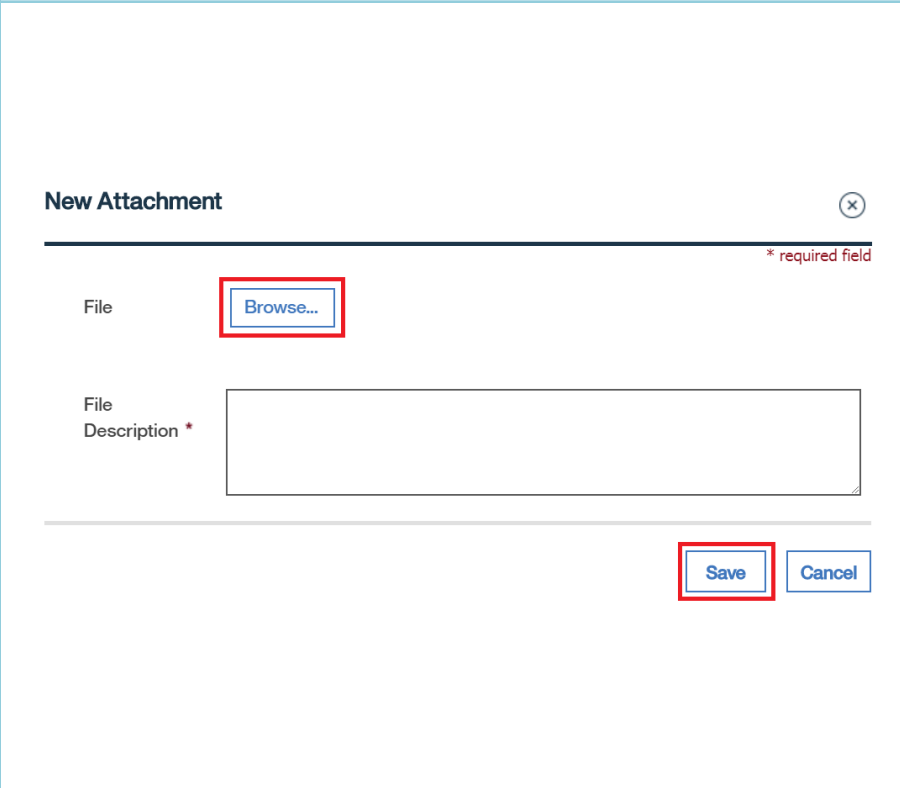
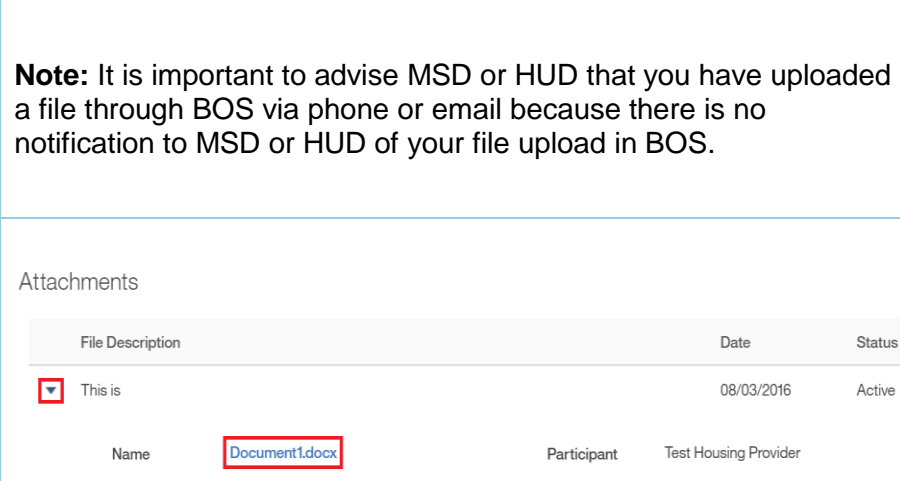
## Appendix D ~ Reasons for declining or withdrawing an offer

Reasons for declining or withdrawing an offer	
Reasons for a <b>client declining</b> a provider's offer are:	Reasons for a <b>provider withdrawing</b> an offer to a client are:
<ul style="list-style-type: none"> <li>• Bedroom is too small</li> <li>• Property history</li> <li>• Unsafe community</li> <li>• Property has stairs</li> <li>• Parking is inadequate</li> <li>• Does not meet disability needs</li> <li>• Distance from public transport</li> <li>• Unsafe physical environment</li> <li>• Poor interior condition</li> <li>• Poor exterior condition</li> <li>• House is too small</li> <li>• Section is too big</li> <li>• Not suitable for cultural reasons</li> <li>• Customer no longer requires housing</li> <li>• Access is poor</li> <li>• Busy road</li> <li>• Offer outside required lettable area</li> <li>• Distance from essential services</li> <li>• Fencing is not suitable</li> <li>• Other + Free text field</li> <li>• Unavailable for contact within 48 hours</li> </ul>	<ul style="list-style-type: none"> <li>• Customer no longer requires housing</li> <li>• Unable to contact client(s)</li> <li>• Property no longer available (e.g. fire damage)</li> <li>• Client(s) temporarily unable to accept the offer (e.g. medical, prison)</li> <li>• Client(s) not a good match to neighbourhood</li> <li>• Property not suitable for client(s) (e.g. mobility)</li> <li>• Property offered to another client(s)</li> <li>• Created in error</li> <li>• Incorrect property description</li> <li>• Not on register</li> <li>• Property no longer available – Cleansing order P-House</li> <li>• Other + Free text field</li> </ul>

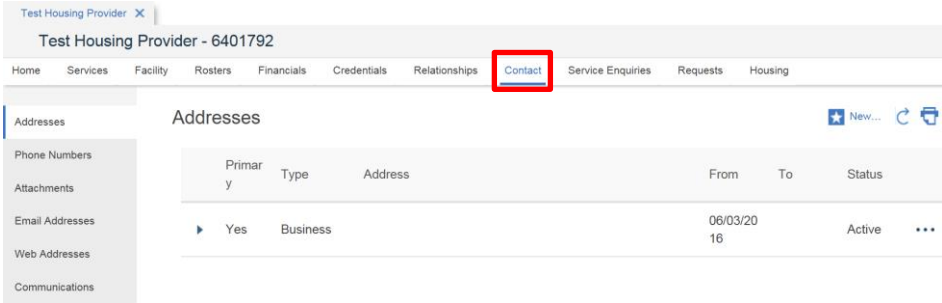
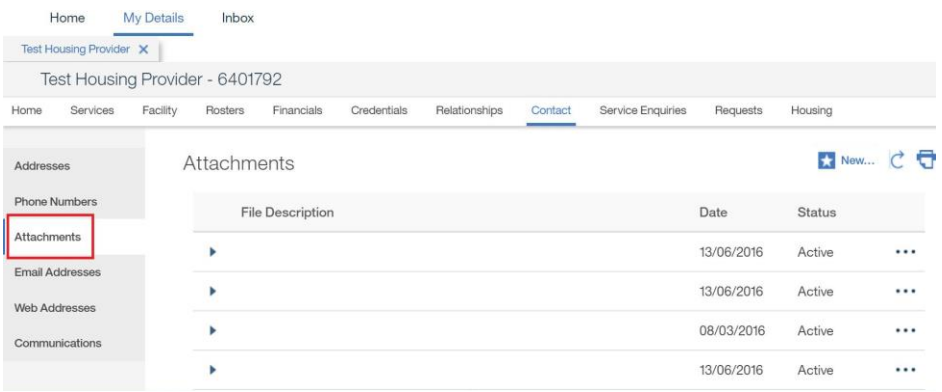

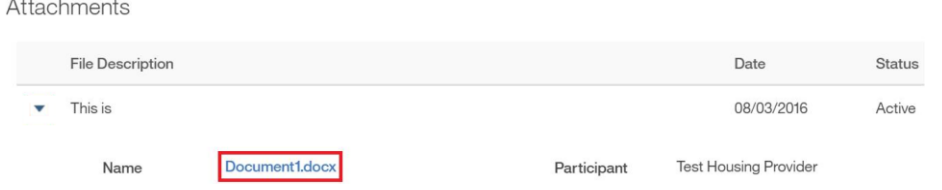

## Appendix E ~ Uploading documents for MSD and HUD

Description	Screenshot
<p><b>Step one</b></p> <p>Log in to BOS and navigate to the 'Contact' tab from within 'My Details'</p>	
<p><b>Step two</b></p> <p>Select the 'Attachments' tab and click 'New'</p>	



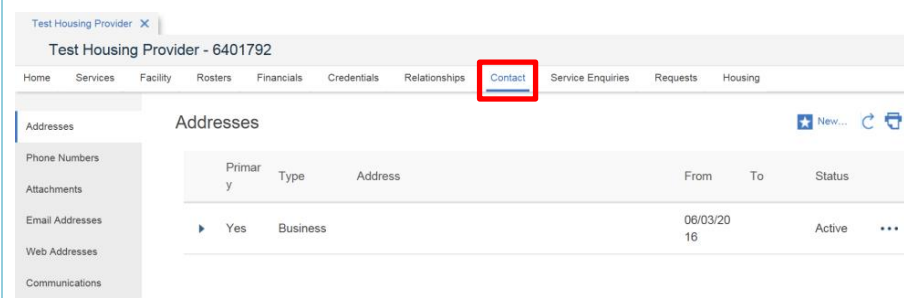
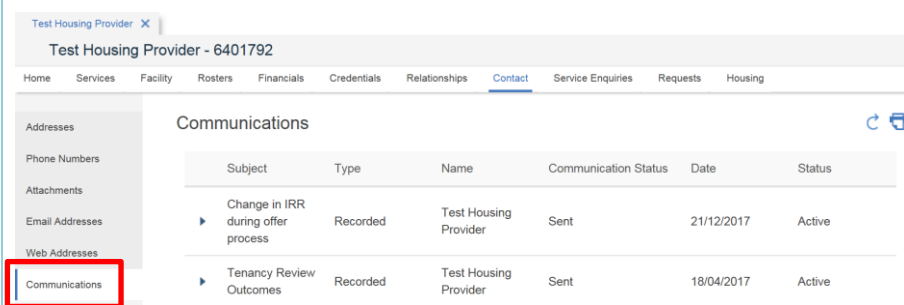
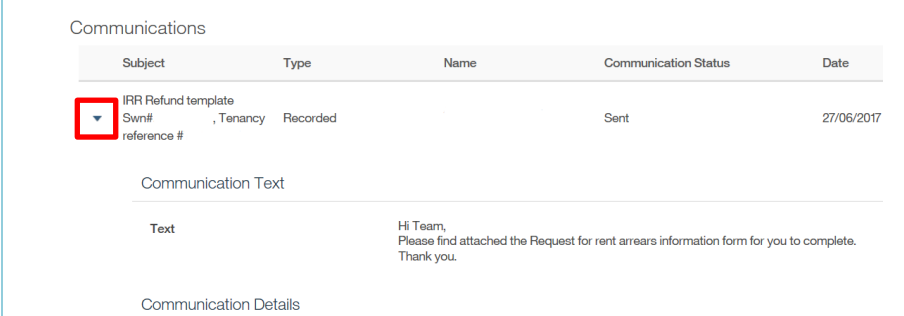
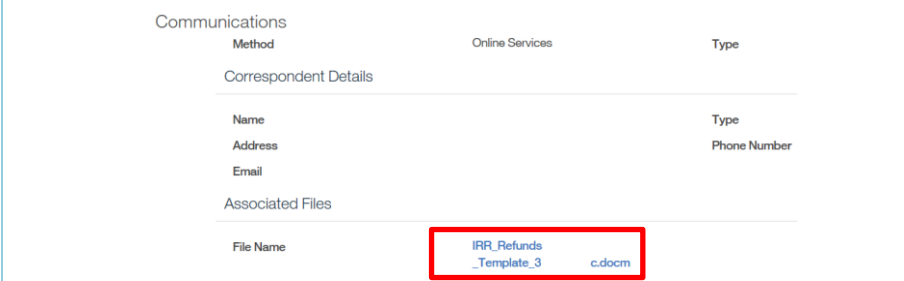
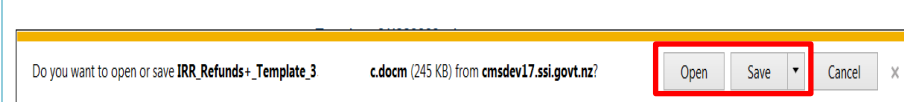
Description	Screenshot
<p><b>Step three</b></p> <p>Select 'Browse', find a file you want to attach within your computer's documents and click open (Note: the filename will display)</p> <p>Enter a description for the file and select 'Save'</p> <p><b>Note:</b> When you are uploading a file to BOS the filename 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 150526Report</p>	
<p><b>Step four</b></p> <p>Advise MSD or HUD via phone or email that you have uploaded a file through BOS</p>	<p><b>Note:</b> It is important to advise MSD or HUD that you have uploaded a file through BOS via phone or email because there is no notification to MSD or HUD of your file upload in BOS.</p>
<p>To view the uploaded file, expand the file description to view the file name and select the name of the file to view what you have uploaded</p>	

## Appendix F ~ Downloading documents sent by MSD and HUD Part 1

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



## Appendix F ~ Downloading documents sent by MSD and HUD Part 2

Description	Screenshot
<b>Step one</b> Log in to BOS and navigate to the 'Contact' tab from within 'My Details'	 <p>The screenshot shows the BOS interface for a 'Test Housing Provider - 6401792'. The 'Contact' tab is highlighted in the top navigation bar. The left sidebar shows various options, and the main area displays a table of addresses.</p>
<b>Step two</b> Select the 'Communications' tab	 <p>The screenshot shows the BOS interface with the 'Communications' tab selected in the left sidebar. The main area displays a table of communications.</p>
<b>Step three</b> Select the triangle which will expand the notification	 <p>The screenshot shows the BOS interface with a communication entry expanded. A red box highlights a triangle icon next to the entry. The expanded view shows the communication text and details.</p>
<b>Step four</b> Select the Hyperlink with the document name	 <p>The screenshot shows the BOS interface with a document name highlighted in a red box. The document name is 'IRR_Refunds_Template_3.c.docm'.</p>
<b>Step five</b> Click either Save or Open on the below	 <p>The screenshot shows a file download dialog box. The 'Open' and 'Save' buttons are highlighted in a red box. The dialog box text indicates the file is 'IRR_Refunds_Template_3.c.docm (245 KB) from cmsdev17.ssi.govt.nz?'.</p>

## Appendix G ~ Join-In Assessment Process

