

Commencing a social housing application

This page provides information and tips to help you answer the questions in the assessment.

On this Page:

Roles and household units

Each individual in the housing application needs to be assigned to a specific role and household unit in CMS. Below will help you identify which role to assign to each individual.

Applicant: All people who are signing the tenancy agreement need to have 'Applicant' assigned as their role. When the household is placed into a property, the role of 'Applicant' automatically changes to 'Signatory' on activation of the tenancy in CMS.

Partner: When a couple exists and only one person is signing the tenancy agreement, the other person needs to have 'Partner' assigned as their role. Where both clients are signing the tenancy agreement, they both need to have 'Applicant' assigned as their role.

Additional Occupant: Individuals who are not on the tenancy agreement or not a partner of someone on the tenancy agreement and are financially independent, 16 years or over and have a specific and established on-going need to live with the household, will need to have the 'Additional Occupant' assigned as their role.

Child: Dependent individuals younger than 18 years old (or 18 years old and in their last year of secondary school) need to have 'Child' assigned as their role.

Household Units: Where there is only one applicant, all occupants in the household should have the household unit '1' assigned to them. Where there are applicants from multiple households, you will need to assign a household unit number to each household.

Note: Where there are multiple households there must be an applicant per household unit.

Assessment information visible to social housing providers

It is important to remember that providers do not have access to the client's full application or to any of the supporting verification we hold. Only the information in fields directly relevant to placement is shared. This means that where key information is recorded in the incorrect fields or without sufficient detail, clients may be matched to properties that don't meet their needs, or placements may be delayed unnecessarily. Please ensure all fields are filled in correctly and in full to avoid any confusion during placement.

Note: Scanned documents and client event notes are not visible to providers. When there is information relevant to the placement in a scanned document or client event note, you need to summarise the information in your comments in the assessment.

When entering comments, ensure that the comments are short, and only contain relevant information that is not already captured in the application.

Comments should be limited to 500 characters (including spaces), and not contain apostrophes ('), hyphens (-), or the ampersand (&) symbol. Otherwise, the public housing (also known as social housing) provider will not receive the comment, which means that the client may not be matched or placed into the most suitable property.

For more information on what information is shared with providers and guidance on where to record specific factors, see:

[Recording assessment information to support housing placement \(Word 88.3KB\)](http://doogle/documents/resources/helping-clients/procedures-manuals/social-housing/screening-and-assessment/recording-information-to-support-placements.docx) [<http://doogle/documents/resources/helping-clients/procedures-manuals/social-housing/screening-and-assessment/recording-information-to-support-placements.docx>]

Health and disability classifications

The following table will assist you when answering the health and disability questions for each person (including children) in the household:

Significant Mental Health	Mixed bipolar affective disorder, Schizophrenic disorders, Affective psychoses, Alcoholic psychoses, Drug psychoses, Chronic depression, Nonorganic psychosis NOS, Obsessional neurosis, Other specified mental disorders, Paranoid schizophrenia, Paranoid states, Reactive depressive psychosis, Recurrent depression, Recurrent major depressive episode, Unspecified bipolar affective disorder
Common Mental Health	Anger reaction, Attention deficit with hyperactivity, Personality disorders, Other post-traumatic stress disorder, Generalised anxiety disorder, Mental disorders, Panic disorder, Phobic disorders

Physical Disability	Ankylosing spondylitis, Rheumatoid arthritis, Morbid obesity, Obesity, Osteoporosis, Nerve and spinal cord injuries, Arthropathy NOS, Musculoskeletal and connective tissue diseases, Osteoarthritis and allied disorders, Osteoarthritis NOS of hip, Osteoarthritis NOS of knee, Congenital anomalies, Other specific learning difficulty, Multiple sclerosis, Internal derangement of knee, Intervertebral disc disorders, Lumbar disc displacement, Lumbar disc prolapse with radiculopathy, Spinal stenosis, excluding cervical region, Spondylosis and allied disorders, Cerebral arterial occlusion, Stroke and cerebrovascular accident unspecified, Hearing loss, Cataract, Blindness and low vision, Diabetic retinopathy
Intellectual Disability	Infantile autism, Mental retardation
Health	Gouty arthritis, Acute myocardial infarction, Angina pectoris, Aortic valve disorders, Atrial fibrillation, Atrial fibrillation and flutter, Cardiac dysrhythmias, Cardiomyopathy, Chronic rheumatic heart disease, Circulatory system diseases, Congestive heart failure, Heart failure, Ischaemic heart disease, Mitral valve incompetence, Other specified diseases of circulatory system, Chronic renal failure, Diabetes mellitus with renal manifestation, Renal impairment, Bronchiectasis, Chronic obstructive pulmonary disease, Emphysema, Other specified diseases of nervous system or sense organ, Disorders of eye and adnexa

Health and disability information

If the client is happy to be matched to a property with a support person, select "Yes" in the "Health Condition" section. The client will then be matched to both properties with and without a support person. The previous fault with this question has been resolved.

Income

Any main benefit paid to the client will automatically populate into the application. This does not include any income held in SWIFTT for the client. You will need to manually enter this. Remember the amount recorded in SWIFTT is gross and all public housing income needs to be net minus the ACC levy.

Use the 'IncomeWorksheet' in the NFIU calculator to calculate the client's net income.

[NFIU calculator](http://doogle/documents/business-groups/helping-clients/service-delivery/centralised-services/centralised-services-ellerslie/knowledge-base/resources/nfiu-calculator.xlsm) (Excel 8.07MB) [<http://doogle/documents/business-groups/helping-clients/service-delivery/centralised-services/centralised-services-ellerslie/knowledge-base/resources/nfiu-calculator.xlsm>]

Note: DREW cannot be used for public housing income assessments as it includes the ACC levy, which is included for benefit income purposes but not for public housing income purposes.

Note: where the client receives a reduced rate of benefit due to Section 192A deduction or sanction, you will need to manually adjust the benefit rate to the full rate through the benefit evidence item.

Letting areas

The applicant must nominate at least three letting areas (defined as individual post codes), unless they have a good and sufficient reason for selecting less than three areas. The more locations added into the application, the better chance the client has to be matched to a property.

Letting areas in CMS include neighbouring suburbs within postcodes. This means a postcode area may include some areas/suburbs that previously would have come under individual letting areas.

Because postcodes are used to match applications to vacancy, it's important the right postcodes are in the client's application.

Below are some tips for adding/editing letting areas:

Add letting areas at the highest level possible. For example, add North Shore if the client is able to live there rather than individual suburbs on the North Shore.

If end-dating the only letting area, you must add a new one. If the letting area(s) are end-dated, the client can't be matched to any properties.

Check the system has assigned a postcode when adding a new letting area (and follow your escalation process if CMS isn't assigning one).

Post codes can be edited (ie added or removed) without changing the selected area fields. The format must be 1234,1234,1234 (no spaces, commas only, no other characters).

Apply changes and check eligibility after adding or editing a letting area.

If a client advises they cannot live in a particular suburb (and they have good and sufficient reason):

Add the letting area at the highest level possible.

Remove the post code for the unwanted suburb.

Add a comment with the name of the suburb that has been removed.

Providers can see what areas the client is unable to live in if a comment has been added. This comment can also be used to indicate to a provider if there is a preferred letting area.

Other factors

These questions help with good matching, such as ensuring client is not offered a tenancy where a rival gang could be present, or informing the provider that the client has pets, or that there are parole conditions that need to be factored. The answers and comments will be shared with providers, so they are aware of these things when considering whether the client is suitable for a vacancy.

The following is an example of how you may approach this question "Is there anything you need to tell us to ensure you are matched to the most appropriate property"?

Adding just the name of a school or a medical centre does not give the provider enough information to understand why the client needs to be placed in a property close to the specific school or medical centre.

For example, you might say in the "School" comments: "Needs to be within zone for ABC School. Child is well established in the school and receives additional support for specific needs. It would be very disruptive to change schools."

There may be circumstances where a client is unable to nominate a minimum of three letting areas. Reasons could include:

Nominated letting area is already large (e.g. rural locations, postal codes that cover several suburbs already)

A good and sufficient reason - as covered in the declines process when a client does not accept a suitable property.

When discussing letting areas with a client, they may not want to nominate an area that you think is suitable (i.e. the client does not have a good reason for not selecting the area). If you identify a suitable area that the client does not want to nominate you can exercise discretion and add these to the client's record.

If the client nominates less than three letting areas you should always consider other potentially suitable letting areas:

If there are other suitable areas, discretion can be used to add the additional areas to the client's record. The client should be advised of this and the reasons why the areas have been added.

If there are no other suitable areas, clear notes must be recorded in the client event advising the reason why the client is unable to nominate three or more letting areas. The letting areas comments section of the letting area evidence should be updated with 'Exemption to have less than three letting areas' so that public housing staff member knows that they do not need to discuss nominating other letting areas with the client. These comments can be seen by the provider during the shortlist process so no personal information should be included.

[MAP - Clients must choose three places where they need to live \(letting areas\) \[http://doogle/map/social-housing/assessment-of-eligibility/clients-must-choose-three-places-where-they-need-to-live.html\]](http://doogle/map/social-housing/assessment-of-eligibility/clients-must-choose-three-places-where-they-need-to-live.html)

[Good and sufficient reasons for declining offer of suitable property \[http://doogle/map/social-housing/register-management-and-referrals/good-and-sufficient-reasons-for-declining-offer-of-01.html\]](http://doogle/map/social-housing/register-management-and-referrals/good-and-sufficient-reasons-for-declining-offer-of-01.html)

Lower Quartile Rent

When adding in affordability of alternative housing, CMS will check the data you have entered against MBIE data (this is held behind the scenes). An error message 'Lower Quartile Rent value does not exist for selected area' may display. This will happen if the area chosen, dwelling type and number of bedrooms do not have a lower quartile value in the MBIE data. If this happens, you will need to try another area, dwelling type or number of bedrooms and select 'Next'. This won't have an effect on the client.

You will also need to complete an assessment in DREW for accommodation supplement. This will determine how much Accommodation Supplement the client would be entitled to if they were renting alternative accommodation.

If you need to determine how many bedrooms are required you can use the below tool to help:

[Bedroom calculator \(Excel 27.11KB\) \[http://doogle/documents/resources/helping-clients/procedures-manuals/social-housing/screening-and-assessment/bedroom-calculator.xlsm\]](http://doogle/documents/resources/helping-clients/procedures-manuals/social-housing/screening-and-assessment/bedroom-calculator.xlsm)

Rent and Bond

During the assessment, you will need to ask clients if they will require financial assistance with rent and bond and record their response in the application.

If there is more than one tenant, you will need to ask how much of the assistance will each tenant need and enter the percentage amount (eg if there are two signatories, and they will require half on the rent/bond, you would enter '50'). CMS will only accept numerical values.

You will need to advise the client that at the time they accept a property offer and sign the tenancy agreement, the bond and rent in advance will be paid directly to the provider (as long as they are still eligible) and the rate of recovery (repayment

amount) will also be set up. If the client wants to set up a negotiated arrangement earlier, this can be noted in the comments field with the question or Evidence Item.

Note: Bond is only paid to Community Housing Providers. HNZ no longer require a bond payment.

Quota Refugees, Protected persons and Asylum seekers, Christchurch Mosque Attack and Christchurch Response Visa

Social Housing assessments for 'quota' refugees are managed by the Housing Case Manager (HCM) linked to the Mangere Refugee Resettlement Centre.

Christchurch Response Visa or people getting Christchurch Mosque Attack payments are managed by the Christchurch response team.

Note: Migrants claiming refugee or protected person status and people getting SNG domestic violence programme payments generally live in the community and are managed by the HCM nearest to where they are living.

[Quota Refugees, Protected persons and Asylum seekers, Christchurch Mosque Attack and Christchurch Response Visa \[http://doogle/resources/helping-clients/procedures-manuals/social-housing/screening-and-assessment/social-housing-for-quota-refugees-protected-persons-and-asylum-seekers-christchurch-mosque-attack-and-christchurch-response-visa.html\]](http://doogle/resources/helping-clients/procedures-manuals/social-housing/screening-and-assessment/social-housing-for-quota-refugees-protected-persons-and-asylum-seekers-christchurch-mosque-attack-and-christchurch-response-visa.html)

Exceptions

The rent and bond questions should be no for:

Client Type	Reason
Low Trust clients	require a face-to-face appointment to apply
Youth Service clients	YSSU process all financial assistance applications
Remote Services clients	RCU process all financial assistance applications
clients who are over the income limit for a RAP	cannot pre-apply for rent and bond in advance as their eligibility for a RAP needs to be assessed

The housing provider will notify CUH if the client requires rent and bond assistance before the tenancy agreement is signed.

Client Event Note template – Assessment

Reason for assessment: new application / transfer / join-in request (non-partner)

Client eligible for social housing: Yes / No

Financial assistance required for bond and rent in advance: Yes / No

(If Yes and there is more than one tenant): How much of the assistance will each tenant need:

Additional verification required: Yes / No

(If Yes) What verification is required and due:

Application has been fast-tracked for Rheumatic Fever: Yes / No

Manager approval required for override of priority rating: Yes / No

(If Yes) Why does the client require an override:

Assessment Summary signed /or posted: Yes / No

Have 3 or more letting areas been recorded in the assessment: Yes / No

(If No) What reason is the client exempted from nominated 3 or more letting areas:

Comments:

Content owner: [Service Delivery - Business Process Management](#) Last updated: 04 November 2020

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Recording assessment information to support housing placements

The housing assessment process is designed to both assess eligibility and collect information needed by housing providers to match clients to a property that best meets their needs.

Only a limited amount of information you record in the assessment is shared with the provider. This means that where key information is not recorded in the correct fields or with sufficient detail, clients may end up being matched to properties that don't meet their needs, or placements are delayed unnecessarily.

Level of information to be recorded

Only information that is directly relevant to the placement should be recorded within the assessment.

There is a need to balance the privacy of the client with the information needs of the provider. The provider needs to know what factors to consider, and how these impact the placement of the client.

Information visible to providers

It is important to remember that providers do not have access to the client's full application or to any of the supporting verification we hold. Only the information recorded in evidence fields directly relevant to placement is shared.

Scanned documents and client event notes are not visible to providers. When there is information relevant to the placement in a scanned document or client event note, you need to summarise the information and include this summary in your comments against the assessment. This includes not adding a comment to the effect "Refer to scanned documents" as this will not help the provider.

❖ **Accessibility, Adequacy, Affordability, Suitability, Sustainability evidences**

Information and comments under the "Current Housing Circumstances" and "Security of tenure" sections in Adequacy evidence is shared with providers.

For all other SAS evidences, the information captured has been obtained to determine the applicant's housing eligibility. As this is not relevant for placement, the housing providers do not have visibility of this information.

❖ **Bedrooms Required evidence**

Where an additional bedroom is required for medical equipment, it is helpful to record the type and amount of equipment as this will help the provider work out the size of the additional bedroom required.

❖ **Housing Requirements evidence**

Information and comments under the "Modifications" and "Other factors" sections is shared with providers.

"Modifications"

When a client requires a modified property, select the appropriate option and these clients will only be matched to modified or modifiable properties.

If a client advises they require modifications, you must only include those modifications that are necessary for the client or someone in the household – do not select the modification if the client advises they would prefer a modification but don't require it due to a health condition or disability. Make sure that the client understands that by selecting required modifications it may take longer for them to be matched to a suitable property.

"Other Factors"

Any factors that are relevant to the placement such as needs related to pets, school, employment, or parole should be flagged and comments included on why this information is important. Adding just the name of a school or a medical centre does not give the provider enough information to understand why the client needs to be placed in a property close to the specific facility.

Pets - Where there are pets in the household, providers need to know the number and types of pets. This is to ensure the property is suitable for those pets, but also any other neighbourhood factors that might make having pets on the property problematic, are avoided. Contrary to belief, HNZ do not have a blanket "no dogs" rule, they will accept dogs on a case-by-case basis, so they do want to know the breed, and in particular whether the dog is registered.

Gang Affiliations - Where a client, their partner, or immediate family has gang affiliations, relevant information such as the gang the client is affiliated with should be recorded in the comments against "Gang Affiliations" under "Housing Requirement" evidence. This helps the provider ensure that the client is not placed in a rival gang area. This includes information on affiliations with smaller or localised gangs.

Prisoner/Parole Conditions - Where a client has parole conditions that relate to the housing placement, it is important that these are noted in the "Other factors" section of "Housing Requirements" evidence. This needs to include relevant information from any parole letters provided, including the name and contact details of the Probation Officer that the housing provider will contact before making an offer to the client.

School - Generally schooling is not considered a sufficient reason for an applicant to limit their placement options, unless a child was receiving additional support due to a learning or behavioural issue. For example, you might say in the "School" comments: "Needs to be within zone for ABC School. Child is well established in the school and receives additional support for specific needs. It would be very disruptive to change schools."

Healthcare - If the client needs to be near a specific health provider or practice, include the name and location of the provider or practice, and the reason why the client needs to be near them.

❖ **Health and Disability Information evidence**

Information and comments recorded in the sections titled "Health Condition" and "Disability Information" are visible to the provider.

"Health Condition"

Any health or disability-related conditions that affect the client's housing needs should be flagged here and comments included on the specific impacts relevant to placements.

"Disability Information"

If the client is hearing impaired and/or visually impaired, this needs to be indicated by selecting the appropriate options. This enables the provider to match the client to an appropriate property.

Examples:

- Emphysema – this is a progressive condition that will generally impact on the client's housing need as it is exacerbated by cold and damp conditions
 - enter "Have a medical condition" = "Yes"
 - tick "Health" and add a comment to record the condition and that the client needs a warm and dry home. If there are any other impacts raised, such as the need for level access, this also needs to be recorded here
 - Remember: Do not record that the client needs level access in the "Modifications" section if that is the only modification they require or else they will be matched to modified properties

- Depression and anxiety where the client has –
 - some experience of depression and anxiety historically but no support required: In this case the condition does not impact the housing need and should not be recorded
 - some recent or current experience of moderate depression and/or anxiety, and the client would like to be referred to properties that include those with a support person on site: In this case the condition does impact on the housing need and therefore should be recorded
 - enter "Have a medical condition" = "Yes"
 - tick "Common Mental Health Issues" and add a comment to record that the client experiences moderate depression and anxiety and that they would like to be referred to properties that include those with a support person
 - enter "Are you willing to be matched to a property with a support person on site" = "Yes".
 - significant issues with depression and anxiety – eg unable to work for extended periods, hospitalisation, on-going support from the District Health Board mental health service, difficulties leaving the house: In this case the condition does impact on the housing need and therefore should be recorded
 - enter "Have a medical condition" = "Yes"
 - tick "Significant Mental Health Issues" and add a comment to record the client experiences significant depression and anxiety, and the impacts of this (eg client has difficulty leaving the house because of anxiety).

❖ **Letting Area evidence**

Where there is additional information on the client's preferred letting areas, this must be noted in the comments field under "Letting Area" Evidence.

For example you should record a comment if the client is ok with a particular suburb, but has a specific street they do not want to live on, or where the postal code covers a large area and the client has specific sub-areas they would like to live in.

❖ **Future Change evidence**

When you identify future changes that will affect the client's housing needs, these should be recorded under "Future change" evidence. This includes information on the due date of a pregnant client, or when the client needs to leave temporary accommodation, including Emergency Housing.

❖ **Comment fields within evidence**

Housing providers only have visibility of an application when it is shortlisted against a suitable vacant property that meets the households housing need. When an application is shortlisted, the provider will see limited information that MSD has determined as relevant for the housing provider to determine placement suitability. Included in the shortlist information are some (not all) of the comments entered in the assessment evidence, see the table below for more information:

Evidence Name	Question	Shared
Accessibility	Is discrimination preventing your from being able to access alternative housing? > Comments	No
Accessibility	Lack of cash resources for essential start-up costs > Is a lack of funds for essential start-up costs preventing your from being able to access alternative housing? > Comments	No
Accessibility	Lack of cash resources for essential start-up costs > Is suitable alternative housing available where you need to live? Comments	No
Additional Occupant	Additional Occupant Details > Reason for entering the household?	Yes
Adequacy	Are there people in your current accommodation that will not move with you? > Comments	No
Adequacy	Are there unsafe or missing facilities in your current housing? > Comments	No
Adequacy	Current Bedroom Allocation > Comments	No
Adequacy	Is the structure of your housing in a serious state of disrepair? > Comments	No

Adequacy	Security of tenure > When do you have to leave your current accommodation?	Only when accom type is Private Rental, Boarding, Own Home, Social Housing
Affordability	Social Housing Affordability > Comments	No
Agent	Agent Details > Comments	Yes
Bedrooms Required	Comments	Yes
Child or Young Person at Risk	Child or Young Person at Risk > Comments	No
Health and Disability Information	Health Condition > Common Mental Health Issues > Comments	Yes
Health and Disability Information	Health Condition > Health > Comments	Yes
Health and Disability Information	Health Condition > Intellectual Disability > Comments	Yes
Health and Disability Information	Health Condition > Physical Disability > Comments	Yes
Health and Disability Information	Health Condition > Significant Mental Health Issues > Comments	Yes
Household Member Risk Information	The client has a history of violent, or aggressive or threatening behaviour > Comments	Yes
Household Member Risk Information	The client has intimidated a staff member to the extent ... racist or sexist comments or behaviour > Comments	Yes
Household Member Risk Information	The client has known convictions for violence > Comments	Yes
Household Member Risk Information	The client is physically violent, or aggressive or threatening > Comments	Yes
Household Member Risk Information	There is an extreme danger to staff safety > Comments	Yes
Household Risk Information	The premises are known as a place where gang members gather > Comments	HNZ Only
Household Risk Information	There is a suspicion that drugs are being manufactured or sold on the premises > Comments	HNZ Only
Housing Overrides	Assets Threshold > Comments	No
Housing Overrides	Fast Track reason comments	Yes
Housing Overrides	Income Threshold > Comments	No
Housing Overrides	Residency Criteria > Comments	No
Housing Overrides	Select Priority Rating > Comments	No
Housing Requirements	Other Factors > Employment > Comments	Yes
Housing Requirements	Other Factors > Gang Affiliations > Comments	Yes
Housing Requirements	Other Factors > Healthcare > Comments	Yes
Housing Requirements	Other Factors > Pets > Comments	Yes
Housing Requirements	Other Factors > Released prisoner/parole condition > Comments	Yes
Housing Requirements	Other Factors > School > Comments	Yes
Letting Area	Letting Area > Comments	Yes
Reason For Housing Enquiry	What steps have you taken to find suitable alternative housing? > Comments	No
Suitability	Do you need to move because of cultural issues? > Comments	No
Suitability	Do you need to move because of isolation? > Comments	No
Suitability	Do you need to move due to increased living costs? > Comments	No
Suitability	Do you need to move for employment reasons? > Comments	No
Suitability	Do you need to move for family reunification? > Comments	No
Suitability	Do you need to move for personal reasons? > Comments	No
Suitability	Is your need to move due to medical or disability reasons? > Comments	No
Sustainability	Do difficulties in social functioning or lack of social skills make it hard for you to find or keep alternative housing? > Comments	No
Sustainability	Do difficulties with financial management make it hard for you to find or keep alternative housing? > Comments	No
Sustainability	Experienced issues with transience over the past two years > Comments	No



Map. The Guide to Social Development Policy

Home | Social housing | Assessment of eligibility | Qualifications | Clients must choose three places where they need to live (letting areas)

<http://doogle.ssi.govt.nz/map/social-housing/assessment-of-eligibility/clients-must-choose-three-places-where-they-need-to-live.html>

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Clients must choose three places where they need to live (letting areas)

MSD is responsible for confirming a client's eligibility for social housing and determining their housing needs (housing requirements). Property requirements also include consideration of the specific location that is required by the household.

In order to increase the chances of matching them with a suitable property that meets their housing needs, prospective tenants are required to nominate a minimum of three areas where they need to live.

If the prospective tenant cannot nominate three areas, and they do not have a good reason for doing so, MSD can use its discretion to add additional suitable letting areas that the client has not nominated.

Good reasons for not nominating suitable letting areas

Good and sufficient reasons for not selecting three letting areas could include:

- similar good and sufficient reasons outlined for declining a social housing property
- nominated letting area is already large (eg rural locations, postal codes that cover several suburbs already)

Decline policy applies

If a prospective tenant is offered a property in the additional nominated letting areas, the declines policy applies and they will be removed from the register if they do not have a good and sufficient reason for declining the property.

More information

For more information, see:

- [Good and sufficient reasons for declining offer of a property](#)
 - [Nominating and updating letting areas](#)
-