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This page outlines the process to finalise the application, including the steps to move the client onto the register or close the application.

Finalising the social housing application

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On this Page:

There are actions which need to be completed once the application has been created. The actions are as follows:

Add 'Primary benefit of Household' Evidence (this is currently not captured during the assessment and needs to be assigned for each household unit to ensure the affordability rating is correct).

Check eligibility to assign priority rating and indicative IRR.

Consider whether the priority rating accurately reflects the client's entire circumstances. If not, can you update evidence, or is an override required (click here for more information about changing a priority rating [http://doogle/resources/helping-clients/procedures-manuals/social-housing/screening-and-assessment/changing-a-priority-rating.html]).

Print the Assessment Summary. If the assessment was completed over the phone, this will need to be sent to the client for them to sign and return, with a covering letter and a return envelope. Ensure that you send 2 copies of the assessment, one for the client to keep, and one to send back to you.

Ready for Determination and authorising the application.

If the client is not eligible or does not want to continue, you will need to close the application in CMS [http://doogle/resources/helping-clients/procedures-manuals/social-housing/screening-and-assessment/finalising-application.html#Closingapplications7] . When the application is closed, CMS will generate a letter advising the client of the outcome.

Note: Every time you add or update evidence you must check eligibility to determine if the evidence changed impacts eligibility, priority rating or indicative IRR. Refer to:

Updating evidence in the social housing application [http://doogle/resources/helping-clients/procedures-manuals/social-housing/screening-and-assessment/updating-evidence.html]

Viewing the eligibility, priority rating and indicative IRR

You can view the eligibility, priority rating and indicative IRR in the 'Eligibility Check' tab:

If one of the applicants is not eligible, this detail will be displayed in the Eligibility tab. If they are not eligible, you will need to determine why and consider other options for the client.

The priority tab will display the priority rating and a breakdown of the score for each SAS criteria.

The Income Related Rent tab displays the indicative IRR and details of how it was calculated.

Assessment Summary

The assessment summary is based on the questions completed during the application. Any updates made to Evidence (once the application has been completed) will not update the assessment summary and there will be no ability to generate an updated one with any new information.

The assessment summary has both a declaration section for the applicant/partner and additional occupants. The declaration section for additional occupants gives permission for clients to provide identification on their behalf (if required). After every assessment, the client must be provided with the assessment summary. This can either be provided to the client at the end of their interview or sent by post (if completing a phone assessment, you will need to post it to the client).

If the client does not sign and/or return their assessment summary, or provide their verification within 20 working days you will need to close their application. [http://doogle/resources/helping-clients/procedures-manuals/social-housing/screening-and-assessment/social-housing-assessment.html#closing-applications]

What to do with the assessment summaries

As part of the assessment process, you only need to scan the signed obligations page into CMS (Scanned Documents). You don't need to scan or batch the full assessment summary.

If you have been storing assessment summaries, these can be destroyed as long as the signed obligations page has been scanned into CMS.

Verification

In line with processing standards, clients applying for public housing (also known as social housing) are required to provide identification (including identification for any dependent children).

Details of verification required needs to be clear in the letter (prepared via CMS) and in the Client Event Note. The client has 20 working days from the date of their assessment to return the assessment summary and any verification required (an additional 20 working days can be given if the client has a change in circumstances during this time).To keep track on this, you will need to assign the Client Event Note to your regional Housing work on hold queue. CMS doesn't automatically close the application after 20 working days.

The client does not need to provide their verification again if we already have it unless there have been changes to their circumstances. Following is a table outlining where the verification will be held if they are a Ministry client.

Verification	Location
Identification	Scanned in to CMS
Children's details	SCHI screen in SWIFTT or CMS
Residency	Residency details in CMS
Ordinarily resident	Residency details in CMS
Income	INCMH screen in SWIFTT or in CMS
Assets	INCMH screen in SWIFTT or in CMS

If you are using existing verification, you should record this in the Client Event Note.

If a client is receiving assistance from StudyLink and you need to verify information held in SAL, this information can be obtained from Q-Manager, via the StudyLink tab. Any information obtained through Q-Manager is considered verification as it is taken direct from SAL information.

Verification Received

When the client provides verification, you will need to check that the verification supports the circumstances and go through the same process of collecting information from the client, scanning and saving the required Evidence, and linking this to a client event note. For phone assessments, the client must either drop this information into their nearest service centre or send it directly to CUH.

When all verification has been received and recorded in the system, you will need to check and confirm that the application can be moved to the Social Housing Register e.g. all verification has been scanned, notes have been made etc.

Note: Remember to ensure that you have captured all information within the public housing application that the client has provided to support the application.

> Information shared with social housing providers [http://doogle/resources/helping-clients/procedures-manuals/social-housing/screening-and-assessment/social-housing-assessment.html#Assessmentinformationvisibletosocialhousingproviders2]

Verification not received

If the client does not provide their verification within the timeframe you will need to close their application [http://doogle/resources/helping-clients/procedures-manuals/social-housing/screening-and-assessment/social-housing-assessment.html#closing-applications].

Ready for determination and authorising applications

To place the application on the Social Housing Register the application needs to be authorised.

However, before authorising the application, you will need to generate the outcome letter which advises the client they are on the Social Housing Register.

From the Actions button select Authorise, save and close (do not add any comments in the box that appears).

The authorising of the application can fail for any of the following reasons:

one or more of the applicants are ineligible
priority rating is a 'C' or 'D'
applicant or partner is linked to an application which is already on the Social Housing Register
authorisation time out (if this happens, you will need to try to authorise the application again).
an 'Awaiting Resolution' [http://doogle/whats-on/projects/social-housing/transition-issues-and-solutions.html#StatusofldquoAwaitingResolutionrdquoappearswhenattemptingtocompleteasocialhousingapplication3] message

an 'Authorisation Failed' [http://doogle/whats-on/projects/social-housing/transition-issues-and-solutions.html#StatusofldquoAuthorisationFailedrdquoappearswhenattemptingtocompleteasocialhousingapplication2] message

Once authorised, CMS will automatically assign the application to the Social Housing Register and display a 'Waitlist' status.

Client-initiated transfers

When authorising an application for a client-initiated transfer, a pop-up box will display [http://doogle/images/resources/helping-clients/procedures-manuals/social-housing/screening-and-assessment/client-intiated-transfer-authorise.png] . In this pop box you will need to check that the names that appear in the existing case match all of the adults (people with a client number) in the application. Once you are happy that all of the adults match, you select the existing case and save. Please do not select 'Create New Social Housing Case'.

Remember that for an application to be considered a 'client-initiated transfer', the expectation is all the signatories and partner(s) (if any) in the tenancy must be moving. If they are not all requesting the transfer, then the application is not a transfer – it is a new application. If it is an additional occupant who is not moving that displays in the pop up box, ignore the pop-up box.

If the authorisation fails, and you unsure why, first check your notifications. If you are still unsure contact MSD Service Desk.

Closing applications

If the client has not provided verification (including signing their assessment summary) within 20 working days, you will need to manually close the application. From the Actions button select Ready for Determinations. This will close the application and cannot be re-opened.

To check the application was closed select the Program tab to show any pending applications. From there, click on the arrow icon and select 'Deny'.

Once the application has closed, CMS will generate a letter advising the client of the outcome.

Content owner: Service Delivery - Business Process Management **Last updated:** 06 November 2020

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