

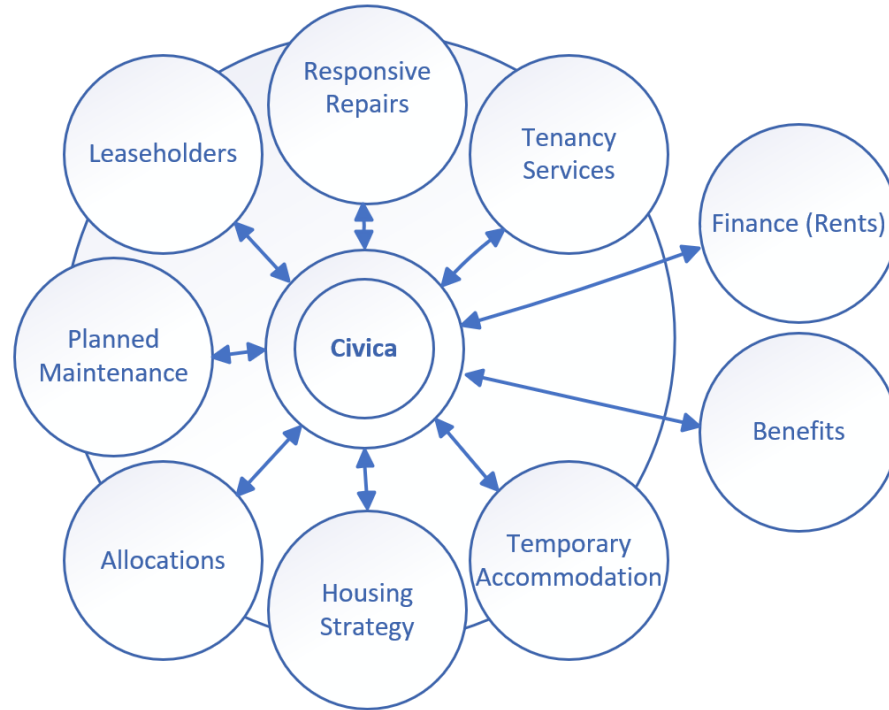
Housing Management System Civica

Background

- Why did we need new software?
 - Disconnection
 - Multiple systems used
 - Duplication of records
 - Outdated
 - Manual processes when should be automated



Civica



Implementation: Data Migration

Data Area	Number of Records
Addresses	4,297
Assets	3,825
Asset Alerts	235
Asset Characteristics	10,789
Asset References	3,823
Contacts (names)	4,392
Contact Addresses	4,359
Contact Groups (households)	4,434
Contact Group Members	4,450
Contact Languages	4,200
Contact References	4,375
Rent Accounts	4,581
Rent Account Payment Types	3,491
Rent Actions	6,557
Rent Agreements	4,581

Data Area	Number of Records
Rent Agreement Charges	56
Rent Agreement Charge Elements	56
Rent Arrangements	9
Rent Arrangement Repay Amounts	9
Rent Arrangement Schedules	969
Rent Asset Charges	3,059
Rent Asset Charge Elements	8,030
Rent Court	19
Rent Entitlements	1,034
Rent Evictions	1
Rent Notice	25
Rent Transactions	1,413,536
Repair SORs	3,440
User Defined Fields	3,042
Total Records Migrated	1,501,674

The System: Rents

Mrs Made Up Name, Miss Another Name
1000 Hornby Close, Warsash, Southampton,
SO31 9GN
Open date Mon, Sep 07 2009
Close date

Balance 233.5
Arrears policy Current
Landline
Mobile
E-mail

Alerts

Alert type	Description
	Visit / Interview in Pairs

Quick View | Details | Summary | Payment Methods | Transactions 364 | Expected Payments 0 | Projected Balance | Actions 1 | Notice 0 | Court 0 | Eviction 0 | Arrangements 0 | Action History 2 | Apportionment 0 | Appointments 0 | Communicate

New Repayment Arrangement | Contact Details | Agreement Details | View Documents

Time **Annually**

Account Balance


Date	Balance
15/09/2017	0
15/09/2018	0
15/09/2019	280
15/09/2020	480
15/09/2021	-50
15/09/2022	230

Recent Action

Action	Date	Type	Value	Balance	Comment	Doc
Arrear	Sat, Feb 05 2022 13:00	Arrears Policy Switch		233.56	Switch from No policy to Current	
Transaction	Mon, Dec 20 2021 00:00	Charge	0.11	233.56		
Transaction	Mon, Dec 20 2021 00:00	Charge	97.67	233.45		
Transaction	Wed, Dec 15 2021 00:00	Payment	-423.71	135.78		
Transaction	Mon, Dec 13 2021 00:00	Charge	0.11	559.49		
Transaction	Mon, Dec 13 2021 00:00	Charge	97.67	559.38		
Transaction	Mon, Dec 06 2021 00:00	Charge	0.11	461.71		
Transaction	Mon, Dec 06 2021 00:00	Charge	97.67	461.60		
Transaction	Mon, Dec 06 2021 00:00	Charge	117.33	363.93		
Transaction	Wed, Dec 01 2021 00:00	Payment	-10.00	246.60		
Transaction	Mon, Nov 29 2021 00:00	Charge	0.11	256.60		
Transaction	Mon, Nov 29 2021 00:00	Charge	97.67	256.49		
Transaction	Mon, Nov 29 2021 00:00	Charge	117.33	158.82		


The System - Assets


Asset Details for 1000 Hornby Close, Warsash, Southampton, SO31 9GN Save | Menu | Help | Dock | Close



Contact: Mrs Made Up Name, Miss Another Name
Asset address: 1000 Hornby Close, Warsash, Southampton, SO31 9GN
Status: Under Agreement
Action plan: 100060367082
Plan milestone:

Bedrooms: 2 bedrooms
Type: Flat
Classification type: Dwelling
Category type: HRA General Needs Social Rent
Ownership: Fareham - Freehold
Management: AllServices
Repair responsibility: Full Repairs



Alert type	Description
	Adapted for Disabled

Details | Characteristics 4 | Hierarchy 1 | Alerts 1 | Appointments 0 | Contact & Groups 1 | User Defined | References 2 | Management & Ownership * | History 1 | Cases 0 | Keys 0 | Service Charges 0 | Functional Units 6 | Stock Condition 0 | Equipment 0

New Asset | Rent Details | View Documents | Asset Status Update

Address: 1000 Hornby Close, Warsash, Southampton, SO31 9GN

Type: Flat

Bedrooms: 2

Asset reference: 100060367082

UPRN: 100060367082

LLPO: 100060367082

NLPG: 100060367082

Geo location:

Description: 3 Hornby Close

Status: Under Agreement

Classification type: Dwelling

Category type: HRA General Needs Social Rent

1999 Valuation: 96,000.00

Local authority: Fareham

County: Hampshire

Country: England

Net debt: 0.00

Peak debt: 0.00

Effective from: Mon, Sep 07 2009

Effective to:

Expected handover date:

Actual handover date:

Construction date: Sun, Jan 01 1956

Sinking fund applicable:

Keystone management type: 2-Bedroom Ground Floor Flat

Keystone ownership: FBC Owned

Keystone base class: SO31 9

Asset management group: Default

Keystone parent asset: Hornby Close 1.4, Hornby Close, Fareham, SO31 9GN

Surveyed by: Clive Barwis

Survey date: Fri, Jun 21 2019

Right to buy:

Right to acquire:

Social home buy:

Home buy notes:

The System: Allocations

Application Reference APP00000001 Save | Menu | Help | Dock | Close

Applicant	Mr Burt Bacharach	Application Type	Housing List
Application address	32 Barnes Close, Sarisbury, Southampton, SO31 7BU	Company	Fareham Borough Council
		Application Date	Tue, Dec 14 2021
		Application Status	Live

Alerts

Alert type	Description
No records to display	

Summary | Application Form | Verification | Lists | Needs | Medical | Matches and Offers | Reviews | Suspensions and Appeals | Communications | Cases 0 | Forms | Archiving | User Defined | Functional Units 0

Household

Household Details

Household Member

Title	Forename	Surname	Sex	DOB	NI Number	Pregnant	Date Due	Main Applicant	Joint Applicant	Moving
Mr	Burt	Bacharach	Male	Sat, May 12 1928				<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Household Relationships

Add at least 2 contacts to application to see Relationship Group.

Application Address

Address	Application Address Type	Application Main Address	Application Tenure Type	Application Accommodation Type	Application Address From	Application Address To
32 Barnes Close, Sarisbury, Southampton, SO31 7BU	Main Residence	<input checked="" type="checkbox"/>		Living with Friends/Family	12:00 Sun, Aug 01 2021	

The System: Allocation Match

Application Reference APP00000001 Save | Menu | Help | Dock | Close

Applicant: **Mr Burt Bacharach**
Application address: **32 Barnes Close, Sarisbury, Southampton, SO31 7BU**

Application Type: **Housing List**
Company: **Fareham Borough Council**
Application Date: **Tue, Dec 14 2021**
Application Status: **Live**

Alerts Alert type Description
No records to display

Summary | Application Form | Verification | Lists | Needs | Medical | **Matches and Offers** | Reviews | Suspensions and Appeals | Communications | Cases 0 | Forms | Archiving | User Defined | Functional Units 0

View Matches

Match Lists - 2 records Menu

Match List Date	Resource	List	Position	Outcome	Reason	Notes
Mon, Jan 24 2022	52 Valentine Close	Housing List	9			
Wed, Feb 02 2022	69 Privett Road	Housing List	8			

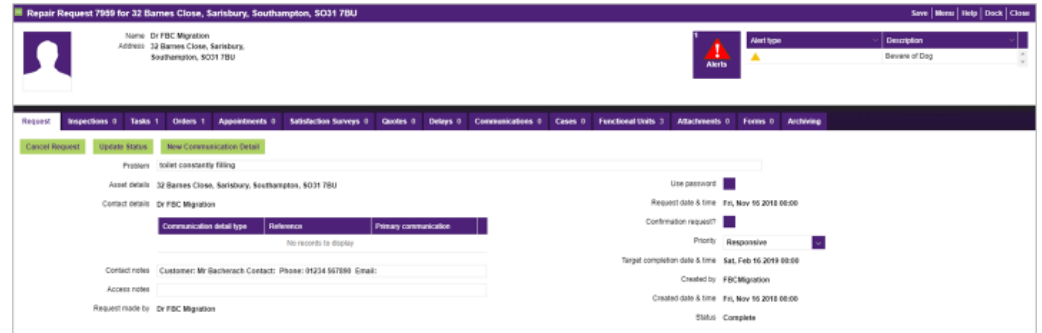
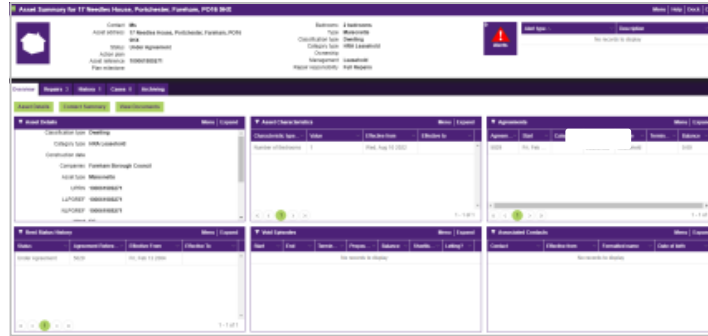
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Offers - 0 record Menu

Offer Ref	Offer Type	Offer Date	Resource	Status	Reason	Notes
No records to display						

Next Phase

- Leaseholders
- Assets
- Contacts
- Service charges
- Repairs
 - Scheduling
 - Materials
- Keystone within Civica
- Tenant Portal



Next Phase: Tenant Portal

- Tenant Portal
 - Agreement
 - Rent details
 - Payments
 - Statements
 - Repairs
 - Messages
 - Compliments
 - Complaints

The screenshot displays the FAREHAM BOROUGH COUNCIL Tenant Portal interface. On the left is a navigation sidebar with the council logo and a list of menu items: My Profile, I would like to..., My Messages, My Requests, My Communications, My Agreements, My Payments, Make Payment, Download a Statement, My Repairs, Log a Repair, My Application, British English (en-GB), and Logout. The main content area is titled 'Overview/Agreement Details' and 'AGREEMENT DETAILS AGREEMENT DOCUME...'. It features a 'My Agreement' section with reference number CHA0000003 and address 3 Acacia Road, Bitterne, Southampton, SO19 7LE. Below this is a 'Household Members' section listing three individuals: Helen Evans (Woman, 51, Tenant: Yes), Max Evans (Man, 53, Tenant: Yes), and Griff Evans (Man, 17, Tenant: No). A fourth member, Huw Evans (Man, 15, Tenant: No), is listed below. The 'Accounts' section shows account reference RNT000003, payment reference PAY0003, a balance of £436.32 Debit, and an open status. At the bottom, there are buttons for 'View Transactions', 'Make a Payment', and 'Download a Statement'.

System Benefits

- IT Security
- Everything in one place
- Empowered officers
- Arrears predictions
- Several 'Super Users'
- Automated processes
- Web Based
- Highly configurable
- Better customer experience - answers to hand
- Simpler, more comprehensive system to use

"The biggest benefit is having so much information available in one place. Searching is so much easier!"

Visually, data is easier to look at with less wasted space, and the fact it is browser based makes it far simpler to use."



Questions

