

Allocate Social Housing

OVERVIEW
ALLOCATION PROCESS
PROCESS TRIGGER SCENARIOS

This process describes the steps taken to allocate a property to a Customer on the Social Housing register.

The Allocations process applies to:

- Public housing applications using a shortlist
- Social housing applications where the Customer is known - a manual offer
- Aboriginal and Torres Strait Islander Communities (Remote Indigenous Communities - RIC) - Agency Managed and 40 year leases
- Disaster affected Customers that need to be re-allocated immediately
- Change of Tenancy (CoT)
- Next Step Home - Women on Parole
- Transfer applications

Note: Helping Hand Headleasing, External Funded Providers (EFP) and Mutual Exchanges are covered under separate processes.

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PROCESS TRIGGER SCENARIOS

This process can be triggered by the following scenarios

Pathway Planning (CMS)	<p>The suitable service response is:</p> <ul style="list-style-type: none"> • Public Housing including Aboriginal and Torres Strait Islander Housing • Community Housing • Housing on a remote Indigenous community managed under either a 40 year lease or Agency Appointment • Helping Hands Headlease program (Public or Private)
Terminations	Where a tenant, the department or Community Housing Provider terminates a tenancy, the property will become Void, and available for tenancing.
Fair Expectations of Behaviour (FEOB)	Where a transfer is required because of complaint/tenant behaviour.
Tenant Relocation/Redevelopment Properties	Where a transfer is required due to tenant relocation/redevelopment of properties
OHAR (Ongoing Housing Assistance Review)	Where a transfer is required due to the tenant no longer eligible for the property they're Customererrrently residing in under the Tenancies in Reviewable Properties (TiRP) policy and the UnderocCustomerpancy policy.
Property transfers	Where a transfer is required in responding to a tenant's changes in needs.

Main Process:

[Allocate Social Housing](#)

Allocate Social Housing

HOME file reference: ASH_01.S01.PRO.htm

MATCH SUITABLE APPLICANT

PROCESS STEPS
CONTEXT
COHORT INFORMATION
RESOURCES & TRAINING

No	System	Instruction	Minimum Delegation
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Trigger

The process starts when a property is available for allocation and requires:

- Identifying customers matched as most suitable for the property using the allocations criteria
- Pre-allocation checks to confirm the customer's eligibility, level of housing need and that the property matches the customer's needs in terms of place, type, bedroom entitlements and any other relevant property features (e.g. modifications for accessibility).



Pre-requisites

Manage Social Housing Application- A social housing application has been approved (the application may be in SAP view or CMS)

Create a Housing Register Record - A Housing Register Record must be completed in Reside prior to completing this process.

Terminate a Tenancy - Change of Tenancy or termination of the tenancy must be processed before the property can be allocated.

Link to instruction

[Search for a Social Housing Application in SAP](#)

Determine what type of offer is required

1




If...	then...
a manual offer applies <i>Note: This applies when the customer is already known and shortlisting is not required.</i>	search for the specific property and <u>Create Manual Offer</u> proceed to <u>Allocate Social Housing</u>
shortlisting is required to fill a social housing vacancy	proceed to step 2.




Further Information


[Shortlists and offer types](#)

[Allocate Social Housing](#)


[Helping Hand Headleases](#)

No	System	Instruction	Minimum Delegation
<p>Pre-allocation offers, reserving a property and customer at pre-allocation stage</p>			
2		<p>Search for voids available for allocation Searching for Properties available for offer</p> <p>Note: Properties may be searched using different criteria VT, VU, APT code or HSC admin unit</p> <p>Further information Key property details Properties under redevelopment Details to observe in the Property Details screen Refer to OT (Occupational Therapy) Services Household Types</p>	
3		<p>Access the property details screen, If the property is void untenable - check for the date of expected handover</p> <p>Note: Confirm if Property is marked for redevelopment Action: Property Flags</p> <p>Further Information Properties under redevelopment Key property details Details to observe in the Property Details screen Refer to OT (Occupational Therapy) Services</p>	Housing Officer
4		<p>Verify Following Key Property Fields against the: Data Validation Rules refer to System Instruction - Property Data Validation or Search view/search an Admin unit to ensure the property type is setup correctly.</p> <div style="border: 1px solid red; padding: 5px; margin-top: 10px;"> <p>73(2) - data validation rules - irrelevant</p> </div>	

No	System	Instruction	Minimum Delegation				
		73(2) - irrelevant - data validation					
5		<p>Generate Applicant Shortlist and Print Shortlist</p> <p>Note: If no suitable applicants exist and a search on surrounding suburbs is required - Creating an Applicant List against an APT Code</p> <p>Further Information Shortlists and offer types Allocate Social Housing Order of allocations Selecting pre-allocation offer withdrawn reason</p>	Housing Officer				
6		<p>Identify customer/s to complete pre-allocation check, Search for a Customer in Person Dashboard and view customer history to prepare for the conversation:</p> <p>Things to observe.</p> <ul style="list-style-type: none"> • Previous tenancy history • Outstanding debts • Current Social Housing Applications in SAP or CMS • Check if an interpreter is required. <p>Note: Ensure that an interpreter is available to assist the customer if required</p>	Housing Officer				
7		<p>Action one of the following:</p> <table border="1"> <thead> <tr> <th>if...</th> <th>then...</th> </tr> </thead> <tbody> <tr> <td>the application is in SAP</td> <td> <p>use the information recorded in SAP and Reside Housing Register Record to create Customer profile:</p> <ul style="list-style-type: none"> • Export Customer Details in Person Dashboard to CMS and Update Customer Primary Details for each household member. </td> </tr> </tbody> </table>	if...	then...	the application is in SAP	<p>use the information recorded in SAP and Reside Housing Register Record to create Customer profile:</p> <ul style="list-style-type: none"> • Export Customer Details in Person Dashboard to CMS and Update Customer Primary Details for each household member. 	
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No	System	Instruction	Minimum Delegation				
		<ul style="list-style-type: none"> Set up the household based on the household structure and the relationship of each of the other household member to the customer e.g. co-applicant, resident, dependent. Create Social Housing Application/Create Social Housing Transfer Application. Ensure the effective date in CMS is the same as the effective date recorded against the SAP application <p>proceed to step 8.</p> <p>compare the CMS Social Housing Application and the Reside Housing Register Record, to identify any discrepancies</p> <p>update discrepancies accordingly</p> <p>proceed to step 8.</p> <p><i>Further information</i></p> <p>Maintain Housing Register Record</p> <p>Manage Social Housing Application</p> <p>the application is in CMS</p> <p>Note: There will be gaps in information currently held in SAP to that held in CMS. This is addressed in the next step when customer contact is made and the new wellbeing eligibility is captured.</p> <p>Further Information</p> <p>Search for Customer's Social Housing Application</p> <p>Search for a Social Housing Application in SAP</p> <p>Customer Profile Table</p>					
8		<p>Contact the customer and explain the purpose of the call and advise the customer that additional information may be required.</p> <p>Complete one of the following actions:</p> <table border="1" data-bbox="427 1803 1211 2038"> <thead> <tr> <th data-bbox="427 1803 662 1854">If...</th> <th data-bbox="662 1803 1211 1854">then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="427 1854 662 2038">The customer is contactable</td> <td data-bbox="662 1854 1211 2038"> Proceed to Manage Social Housing Application: <ul style="list-style-type: none"> Confirm that all household members details are current, the household is still eligible for </td> </tr> </tbody> </table>	If...	then...	The customer is contactable	Proceed to Manage Social Housing Application : <ul style="list-style-type: none"> Confirm that all household members details are current, the household is still eligible for 	Housing Officer
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		<p>social housing and there have been no changes to their circumstances.</p> <p>Capture the Well-being criteria:</p> <ul style="list-style-type: none"> • Confirm the customer's housing entitlements (bedroom entitlements, housing types, locations). • Capture any additional information provided by the customer and check if the additional information provided have any impact on their eligibility or housing needs and reassessed as required. • Determine eligibility outcome <p>Proceed to step 9</p> <p>issue the urgent pre-allocation letter requesting a response in 3 working days. A pre-allocation offer can be used to reserve the customer and the property.</p> <ul style="list-style-type: none"> • Create a Shortlist Offer select Pre-allocation as the offer stage and set a 3 day response period. • Print the 'Urgent Pre-allocation letter' - Create Context Report: Allocation Contact Letter • Send the Urgent pre-allocation letter' to the customer. <p>The Customer is not contactable Continue attempts to contact the customer by phone/email.</p> <p>Capture a note in Create a Note or Create a Note to reflect waiting on customer to respond</p> <p>If required - Opening a Power BI Report - select App BIH Allocations (ALLO4 - Outstanding Pre-Allocation Applications), this report will identify all applications where the pre-allocation offer has not been removed.</p> <p>Customer advises no longer wishes to be listed for social housing Proceed to Manage Social Housing Application and cancel the application, also cancel the Housing Register Record in Maintain Housing Register Record.</p>	

No	System	Instruction	Minimum Delegation												
		Further Information Selecting pre-allocation offer withdrawn reason Unable to contact the customer Unable to contact Aboriginal or Torres Strait Islander customer Order of allocations Contacting the customer Allocate Social Housing Outstanding Pre-allocation offers report													
9		<p>Once the pre-allocation check has been completed and outcome determined or the customer has failed to contact the HSC:</p> <table border="1" data-bbox="424 824 1209 2009"> <thead> <tr> <th data-bbox="424 824 715 869">If...</th> <th data-bbox="715 824 1209 869">then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="424 869 715 987">the customer's level of housing need has not changed</td> <td data-bbox="715 869 1209 987">proceed to step 10</td> </tr> <tr> <td data-bbox="424 987 715 1249">the customer is no longer eligible for social housing</td> <td data-bbox="715 987 1209 1249"> Create Bypass Reason, Maintain Housing Register Record and cancel the record. Commence pre-allocation check for the next customer on the shortlist - return to step 6 </td> </tr> <tr> <td data-bbox="424 1249 715 1480">the customer's level or type of social housing need has changed but they are still eligible to be on the housing register.</td> <td data-bbox="715 1249 1209 1480"> Create Bypass Reason and Maintain Housing Register Record Return to step 6 </td> </tr> <tr> <td data-bbox="424 1480 715 1928">a pre-allocation offer has been created and the customer has not replied or is no longer eligible</td> <td data-bbox="715 1480 1209 1928"> Withdrawing an Offer , Generate Applicant Shortlist, Create Bypass Reason against Customer and return to step 6. If required - print the outstanding Pre-allocation applications report from Power BI to identify all applications where the pre-allocation offer has not been removed. Select App BIH Allocation (ALLO4 - Outstanding Pre-Allocation Applications) </td> </tr> <tr> <td data-bbox="424 1928 715 2009">the customer has not contacted the HSC</td> <td data-bbox="715 1928 1209 2009">Create Bypass Reason and return to step 6.</td> </tr> </tbody> </table>	If...	then...	the customer's level of housing need has not changed	proceed to step 10	the customer is no longer eligible for social housing	Create Bypass Reason, Maintain Housing Register Record and cancel the record. Commence pre-allocation check for the next customer on the shortlist - return to step 6	the customer's level or type of social housing need has changed but they are still eligible to be on the housing register.	Create Bypass Reason and Maintain Housing Register Record Return to step 6	a pre-allocation offer has been created and the customer has not replied or is no longer eligible	Withdrawing an Offer , Generate Applicant Shortlist, Create Bypass Reason against Customer and return to step 6. If required - print the outstanding Pre-allocation applications report from Power BI to identify all applications where the pre-allocation offer has not been removed. Select App BIH Allocation (ALLO4 - Outstanding Pre-Allocation Applications)	the customer has not contacted the HSC	Create Bypass Reason and return to step 6.	Housing Officer
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		<p>in the required time frame and no pre-allocation offer has been made</p> <p>a pre-allocation offer has been created, the customer has replied and is eligible</p> <p>Update offer stage to offered Updating Offer Stage</p>					
10	Manual	<p>Seek approval from delegated officer to proceed with the other.</p> <p>Note: The offer of Housing checklist is available if required but is not mandatory</p>	Housing Officer				
11	Manual	<p>Advise the customer that a potential property is available and verify the following:</p> <ul style="list-style-type: none"> • Verify that the customer is able to accept the offer immediately • Verify that the housing type, location, bedroom entitlement or other features of the property meets the customer's needs <p>At this stage, the suburb of the property may be provided to the customer but not the address.</p>	Housing Officer				
2		<p>Determine the customer's availability for the offer and action one of the following:</p> <table border="1" data-bbox="424 1451 1209 2018"> <thead> <tr> <th data-bbox="424 1451 759 1496">If...</th> <th data-bbox="759 1451 1209 1496">then...</th> </tr> </thead> <tbody> <tr> <td data-bbox="424 1496 759 2018"> <p>the customer is able to accept the immediately</p> </td> <td data-bbox="759 1496 1209 2018"> <p>Create a Shortlist Offer and arrange a time to view the property. Provide the keys to the Customer. Customers must accept or decline the offer within 2 days of viewing the property.</p> <p><i>Note: A shortlist offer cannot be made on a property unless the void status is VT</i></p> <p>If vacant maintenance has been completed and the void status needs to be updated go to</p> </td> </tr> </tbody> </table>	If...	then...	<p>the customer is able to accept the immediately</p>	<p>Create a Shortlist Offer and arrange a time to view the property. Provide the keys to the Customer. Customers must accept or decline the offer within 2 days of viewing the property.</p> <p><i>Note: A shortlist offer cannot be made on a property unless the void status is VT</i></p> <p>If vacant maintenance has been completed and the void status needs to be updated go to</p>	Housing Officer
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No	System	Instruction	Minimum Delegation
		<p><u>Complete Standard Vacant Maintenance</u></p> <p>advise the customer that their housing needs and preferences will be updated. Record the reason why the customer cannot accept the offer in Reside.</p> <p><u>Create Bypass Reason</u> and <u>Update List Entry Status</u> if the Housing register Record needs to be deferred.</p> <p><i>Note: The list entry status in Reside is used to record the Customer's housing requirements</i></p> <p>Further Information <u>Customer viewing of the property</u></p>	
<p>Proceed to Stage 2 - <u>Allocate Social Housing</u></p>			

MATCH SUITABLE APPLICANT

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Property search criteria

Properties may be searched using different criteria VT, VU, APT code or HSC admin unit

- VT status means vacant tenable and applies when the vacant maintenance has been completed on a property and the property is ready to allocate.
- VU status means vacant untenable and applies when the property has been terminated and vacant maintenance is ready to commence for re-letting.
- APT Code - this code is used as a shorthand indicator of the property location, dwelling type and number of rooms
- HSC admin unit - this field is used to indicate the HSC that the property is assigned to.

Shortlists and offer types

A shortlist contains a list of customers potentially suitable for the identified property features (suburb, bedrooms etc). This list is then used to identify which customer is best suited to the property and its features.

There are two different types of offers:

Shortlist offer - applies when the officer uses the Housing Register (waitlist) to match a suitable applicant for the property.

A shortlist offer has 2 stages that may be used to manage the offer to the customer:

Pre-allocation stage - At time of pre-allocation, when eligibility checks are being performed on the customer or if the Officer is pre-allocating while the property is vacant untenable, the Officer may create a shortlist offer and select the pre-allocation stage to reserve the property and the customer. See - Pre-allocation offers, reserving a property and customer at pre-allocation stage for further information.

Offer stage - this applies when pre-allocation checks have been completed, the customer has been advised that the property is available and a formal offer to view or accept the property is made.

Manual Offers - a manual offer is selected when the customer is already known and a shortlist is not required. Manual offers may apply when:

- A Pathway conversation has taken place and it has been determined that the customer is in immediate need of allocation to a property and a property is available
- To allocate a property to a customer who was impacted by a disaster event.
- Allocations using a headlease property - headlease properties are private housing products and therefore are not allocated from the housing register but they use the allocations process to establish the headlease tenancy and tenancy agreement in the system.
 - Next Step Home - Women on Parole - the pathway planning conversation has been completed and the customer and property pre-determined.
 - Helping Hand Headlease program (Public and Private) - the pathway planning conversation has been completed and the customer and property have been pre-determined

Direct Let combined with a Manual offer

A direct let combined with a manual offer involves a specific waitlist type to be selected at the time of creating the Housing Register Record and selecting a manual offer at the time of allocating a property to a customer. Direct Let options may be used in the following situations:

- Change of Tenancy (COT) - This is used for applications where there is a change in the household circumstances, requiring a change to the legal tenants on the State Tenancy Agreement.
- Remote Aboriginal and Torres Strait Islander Communities - Not all allocations for Remote Aboriginal and Torres Strait Islander Communities will use a Direct Let and manual offer option. This option is used specifically by the Aboriginal and Torres Strait Islander Housing Unit for the Home Ownership program and emergency relocations

- Community Housing Provider - this is used for applications where the applicant is nominated by the provider under the nominations process.

When an offer is made, the property is removed from the vacancy list and the customer is removed from the housing register (waitlist) so that the property and the customer are not allocated by accident to an alternate property if multiple people are working from the housing register.

Pre-allocation offers, reserving a property and customer at pre-allocation stage

A formal offer in Reside can only be made when a property is vacant tenatable. However, Reside offers the ability to reserve a customer and property during the shortlisting stage. The Officer can do this by selecting the option to create a shortlist offer and setting a status of pre-allocation. An urgent contact letter will be made available for the Officer to send to the customer when this option is selected. It is important to note that when a pre-allocation offer is completed, this will complete the shortlist and the Officer cannot continue to complete pre-allocation checks on other customers on the shortlist. The offer would need to be withdrawn and a new shortlist generated.

Some examples of when the pre-allocation offer may be used is:

- The Officer has determined that a customer is suitable for a property but is waiting on further information from a customer.
- A customer is waiting on disability modifications to be made to a property before the property is vacant tenatable for allocation.
- The Officer is pre-allocating while the property is vacant untenatable.

If the pre-allocation offer is used and the customer is subsequently unsuitable, the offer is withdrawn, the shortlist regenerated and the customer is bypassed.

A report is available (if required) to identify all HRRs where the pre-allocation offer has not been removed.

Failure to contact a customer

If the customer cannot be contacted at first attempt, make further reasonable attempts to contact the customer. Extra time to contact customers should be considered due to their location (e.g. regional or remote), longer postage times if a letter was sent, any other known factors about their circumstances etc. Explore all alternate contacts for the customer including other agencies who support the customer.

If contact can't be made and a shortlist, pre-allocation offer has been created to reserve the property and customer in the system. Create withdrawn offer reason, generate applicant shortlist and record Bypass reason against the customer's record in reside

If the customer identifies as Aboriginal and/or Torres Strait Islander, see Unable to contact Aboriginal or Torres Strait Islander customer

Properties under redevelopment

The department has a property redevelopment program that aims to upgrade, redevelop, dispose or purchase properties to meet community needs and the department's portfolio requirements.

A property with a SAM approval is identified with an element code of SAMREVTEN. If this applies, talk to a senior officer about the conditions for tenancing the property, as the tenancy will be on a short term basis until the property is due for redevelopment.

Do not allocate properties flagged for redevelopment to customers with locational needs or required disability modifications as the tenancy will only be on a short term basis until the property is due for redevelopment.

Customers with locational needs or who need disability modifications may be identified as a suitable match for the redevelopment property and can be considered for allocation but must be informed at the time of offer about the need to move when the property is redeveloped.

If suitable customers for the redevelopment property cannot be found, an above entitlement allocation can be considered to ensure the property is tenanted quickly.

Customers who are offered properties identified required for redevelopment can validly reject the offer of housing, prior to the applicant being advised of the property address or given the keys, on the basis the property is required for redevelopment purposes.

Helping Hand Headleases

Properties sourced for headleasing are allocated to customers who have been approved for the following assistance:

- Helping Hands Headlease - Private Service Response - (Non-Financial Barrier)
- Helping Hands Headlease - Interim Social Housing Service Response
- 1. Next Step Home - Women on Parole

Further information

Helping Hand Headlease

Key property details

Review the following key information (elements) when viewing the property details screen in reside to assist with the matching process:

- SAM Reviewable Tenancy
- Next step home – Women on Parole
- Domestic and Family Violence Cohort
- Redevelopment property
- Wheelchair
- Number of bedrooms
- Level
- Type of property e.g. Remote Communities, Aboriginal and Torres Strait Islander Housing
- Disability Modifications/adaptable
- Housing With Shared Support (HWSS)
- Hard to let
- Check for SAMREVTEN element on property

If a property has modifications (for e.g. wheelchair access) refer to an OT specialist to discuss the allocation.

Details to observe in the Property Details screen

If...	then...
the property is void untenable (VU)	check for the date of expected handover. An offer can be made while the property status is VU, however, the keys and the address cannot be given to the customer until the status changes to VT (void tenable)
the property has modifications (e.g. fully or partially wheelchair accessible)	refer to an Occupational Therapist (OT) to discuss the allocation and confirm the customer or household member has a need for the property modifications.
the property has the SAMREVTEN element code (Strategic Asset Management (SAM) approval).	talk to the delegated officer about the conditions for tenating the property, as it will be on a short term basis until the property is due for redevelopment.
the CPS Flag - Property is marked for redevelopment	talk to the delegated officer about the conditions for tenating the property, as it will be on a short term basis until the property is due for redevelopment.
the property is not ground level	check whether the customer is able to manage stairs, and if so, the amount of stairs they can manage. If there are mobility or medical concerns refer the customer details to the Occupational Therapist.
the property is listed under the Aboriginal and Torres Strait Islander Housing program	check that the customer, or a member of their household, is Aboriginal or Torres Strait Islander
the property is a reviewable property as identified under the Tenancies in Reviewable Properties (TIRP) #PHPM policy	confirm the customer or a household member has a need for the features of the reviewable property (i.e. a fully wheelchair accessible property or 5 or more bedrooms). inform the customer their tenancy will be regularly reviewed to determine their ongoing eligibility and need for this property.
the property has existing disability modifications	if the property has disability modifications, the property must be offered to the first customer whose needs best match the modifications. confirm the customer has a need for the disability modifications.
the property is flagged for redevelopment	do not allocate the property to customers who have locational needs or required disability modifications as the

If...	then...
	tenancy will be on a short term basis until the property is due for redevelopment.

Selecting pre-allocation offer withdrawn reason

The pre-allocation offer may be withdrawn if:

- The customer does not respond within the specified timeframe - see Unable to contact the customer
- All reasonable efforts to contact the customer are unsuccessful
- The customer is unable to accept an offer at this time (see defer a social housing application)
- The review of the customer's circumstances, determine the customer is no eligible for social housing
- The pre-allocation offer was made in error

Withdrawn reasons

Code	Description
WNFO	Withdrawn - no formal offer made
WERR	Withdrawn - offered made in error
WREQ	Withdrawn at customer's request (for example, the customer is not ready to move)
WITH	Default withdrawn for automatic withdrawals - this is a reside automated code - do not use

Once the pre-allocation offer is withdrawn, the property and customer are no longer linked. In this instance, another shortlist can be created to match another suitable customer to the property.

Further information

Unable to contact the customer

Aboriginal and Torres Strait Islander people

Unable to contact the customer

All attempts should be made to establish contact with the customer by telephone, email, SMS or letter to perform the confirm the customer's pre-offer status. Check if the customer has support people, advocates, Guardians or other decision-makers that can help to make contact.

If the customer cannot be contacted, send the Urgent Contact Required letter to the customer. The letter asks the customer to contact the HSC within 3 working days.

Extra time to contact customers by phone, SMS or mail should be considered due to their location (e.g. regional or remote), longer postage times if a letter was sent, any other known factors about their circumstances etc.

There may be some situations where the customer may not be able to contact the department - consider the following factors when a customer has not responded to a request for contact before taking any further actions (e.g. bypassing the customer, cancelling the application):

- Customer may be away in hospital for medical treatment or rehabilitations facility.
- Customer is homeless and unable to access their mail or phone.
- Customer may be overseas or interstate due to family bereavement or family care
- Customer may be unable to access their mail due to escaping domestic and family violence
- Customer may be incarcerated

Further information

Selecting pre-allocation offer withdrawn reason

Unable to contact Aboriginal or Torres Strait Islander customer

Unable to contact Aboriginal or Torres Strait Islander customer

Where possible, all communication with Aboriginal and Torres Strait Islander customers regarding an offer of housing should be conducted in person whilst visiting the community.

The following reasons should be considered when a customer has not responded to contact:

- Sorry Business - Aboriginal Communities
- Bad or Sad News - Torres Strait Islander Communities
- Murri Time - Aboriginal people
- Island Time - Torres Strait Islander people
- Calendar of significant events - Attending cultural or sporting events
- Being transient - going from one place to another
- Experiencing domestic and family violence
- Away for medical treatment for themselves or to support a family member
- Imprisonment
- Away for employment or training
- Visiting regional centres for business, shopping, or to access services
- Attending meetings
- Visiting traditional country

Some absences may be for short periods of time but others could be for longer periods (e.g. several months) such as for seasonal employment.

Keeping in touch with customers and encouraging them to be open about their circumstances will help the department be aware of their whereabouts and return.

Traditionally, a customer has 3 days to respond to, and accept an offer of housing. Due to exceptional circumstances however, apply discretion where customers may have up to 21 days to respond to an offer of housing.

Many Aboriginal and Torres Strait Islander communities do not have reliable and frequent mail service, therefore only post an offer letter as a last resort, except where the applicant has specifically requested this action.

If all efforts to contact the customer are unsuccessful, or the applicant accepts the offer of housing but fails to keep the sign up appointment, final consultation with the Council should occur prior to cancelling the customer's application.

Selecting bypass reasons

Where a decision is made to bypass the customer on the housing register and offer housing to the next customer, the reason for bypassing must be documented and the reason recorded. This ensures transparency in the decision-making process about which customer receives an offer of housing and why over other customers.

Decisions to bypass a customer should only occur in response to the following - record the applicable code in reside and enter a note in CMS:

Code	Description
NOOFFER	Unable to accept offer at present
OT Manage	OT managed, property not suitable
NOMATCH	Customer/property not suitably matched. Enter a note about why the customer/property was not a match.
HOUSED	Customer already housed appropriately

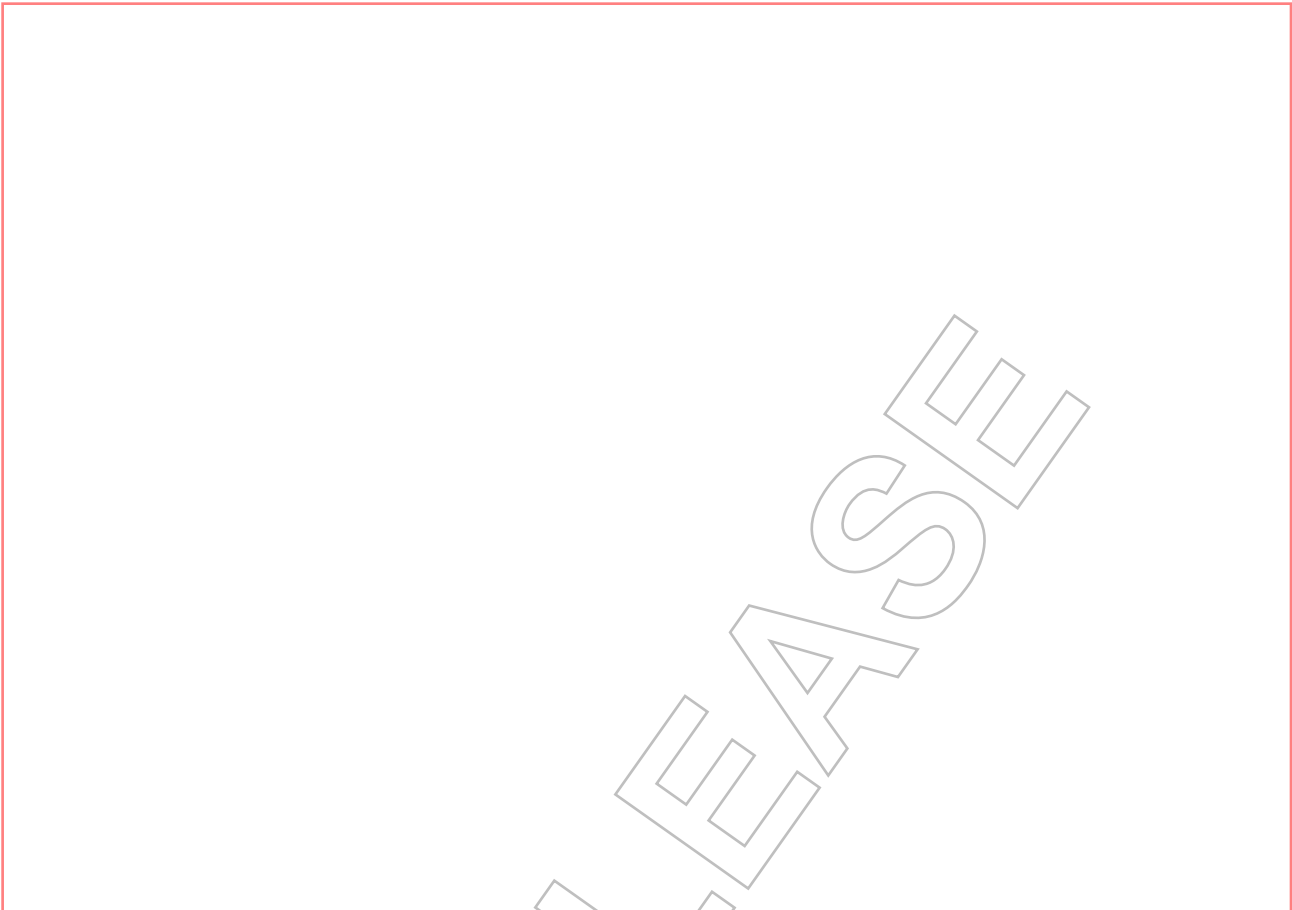
Household relationships and groups

Each Application and Tenancy have an associated Household record made up of one or more parties or people. The Household records for Applications are referred to as Involved Parties and the Household records for Tenancies are referred to as Household People. All parties and people must be assigned a Relationship and Household Group when they are added to an Application or Tenancy.

Relationships and household grouping must be established and confirmed before income details are recorded and a Subsidy Application is raised to prepare the household to assign rent.

Customer Household Relationship

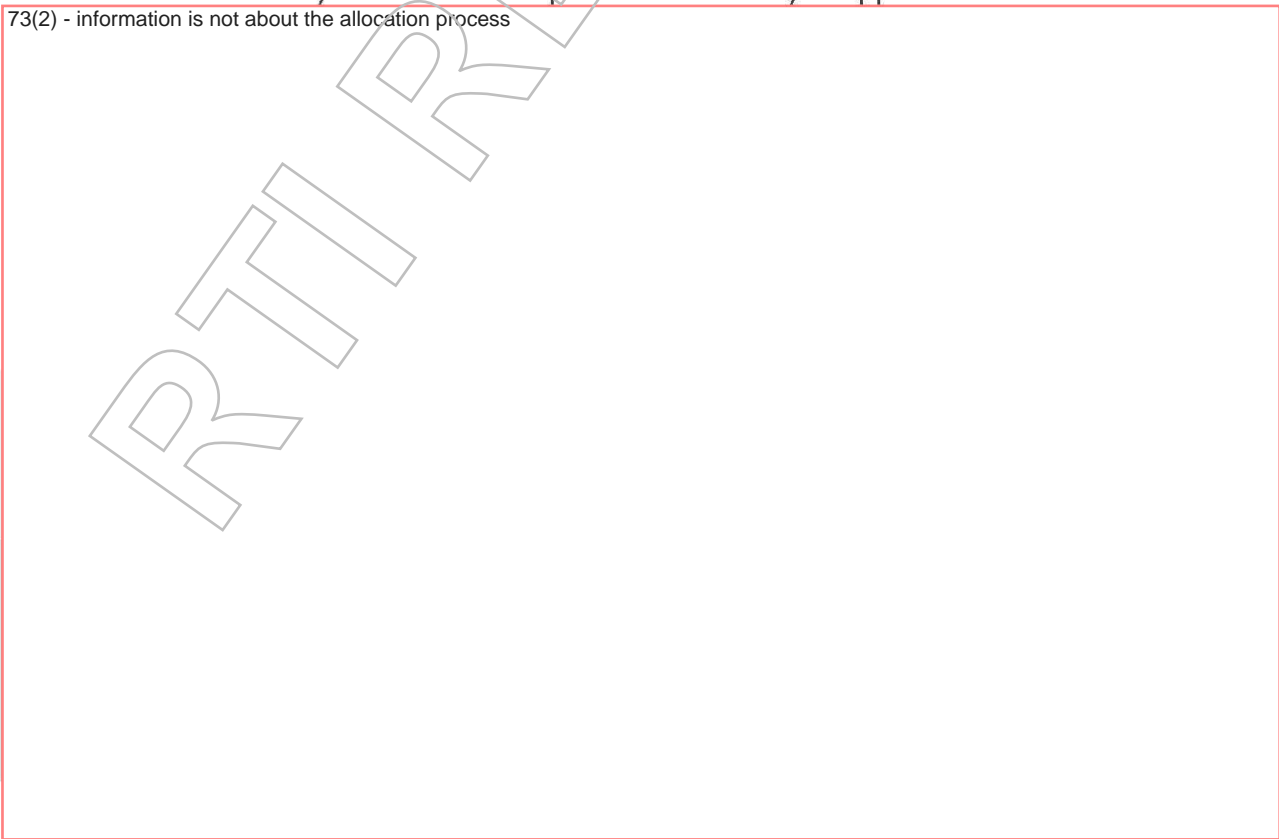
73(2)- information is not about the allocation process



Household Groups

A Household Group represents the relationships of the family groups that can exist within a tenancy or application. Each Household Group will have an assigned Head of Household and there can be one or many Household Groups within a tenancy or application.

73(2) - information is not about the allocation process



Allocate Mutual Exchange

- OVERVIEW
- ADDITIONAL INFORMATION
- MUTUAL EXCHANGES - POLICY
- MUTUAL EXCHANGE - APPLICATION
- MUTUAL EXCHANGE - ELIGIBILITY CRITERIA
- MUTUAL EXCHANGE - EXCEPTIONAL CIRCUMSTANCES

A mutual exchange applies when two customers (tenants) submit a request to exchange their current Public Housing properties. Tenants may seek a mutual exchange to meet a change in their personal circumstance.

Mutual exchanges may be approved where customers meet the eligibility criteria for a mutual exchange and demonstrate a reasonable ground for needing to move to another public housing property.

Mutual exchanges are customer-initiated and customers must identify other customers who are willing to exchange properties. Customers can exchange properties once the mutual exchange is approved.

Requests for mutual exchanges will be considered to ensure:

- customers meet all of the social housing eligibility criteria; and
- customers have a reasonable ground for needing to swap their property with another public housing tenant and be able to supply evidence to support their reason for the swap, if this is requested
- customers accept the mutual exchange property condition as is, and are responsible for any property damage or unapproved alterations including any costs associated with the rectification or removal
- the properties are not high demand properties due to their features and/or location
- that approving the mutual exchange will not have an unreasonable impact on other customers waiting for social housing

Mutual exchanges satisfy the customers need to relocate, without impacting on overall housing register numbers. Mutual exchanges do not necessarily disadvantage customers listed for a transfer. This is because if the exchange was not approved both households would remain in their respective property. If the mutual exchange is not approved, the customers may choose to list and be assessed for a transfer. Mutual exchanges may assist the department to better manage its property portfolio.

The department's responsibility is to ensure best use of its assets and that available housing assistance is only provided to eligible customers in housing need. In some cases, customers will not be approved for a mutual exchange, for example, the customer does not meet the eligibility criteria or where the property may be in high demand due to its features or location. When discussing mutual exchange with customers adopt a pathway planning approach to explore their housing and support needs and if a mutual exchange is not approved, whether other housing products and services may assist the customer.

Customers living in Community Housing cannot seek to exchange properties with customers living in Public Housing and vice versa.

OVERVIEW
ADDITIONAL INFORMATION
MUTUAL EXCHANGES - POLICY
MUTUAL EXCHANGE - APPLICATION
MUTUAL EXCHANGE - ELIGIBILITY CRITERIA
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If	Then
the household cannot demonstrate a need for the features of the reviewable property	the exchange may only proceed if there are no customers waiting for social housing who need the features of the reviewable property.
If there are customers on the housing register who require the features of the reviewable property	do not approve the mutual exchange

Tenants who are eligible for social housing but who cannot demonstrate a reasonable need to move to another property will be deemed ineligible for the mutual exchange. If only one household is eligible, the mutual exchange will still be declined as both households need to be eligible for the mutual exchange to proceed.

Main Process:

[Allocate Mutual Exchange](#)


[IONS](#) >> [ALLOCATE MUTUAL EXCHANGE](#) >> PROCESS - STAGE 1

Allocate Mutual Exchange

HOME file reference: AME_01.S01.PRO.htm

1
RECEIVING MUTUAL EXCHANGE REQUEST
PROCESS STEPS
CONTEXT
COHORT INFORMATION

RESOURCES & TRAINING

No	System	Instruction	Minimum Delegation
	Trigger	<p>The mutual exchange process can be triggered by either:</p> <ul style="list-style-type: none"> • A customer (tenant) requesting to exchange the Public Housing property they're currently living in with another tenant. Initial contact can happen via phone, email, online or at a Housing Service Centre (HSC). • A customer provides a signed Application for Mutual Exchange (Swap) form 	
1	Manual	<p>Assess the request to ensure that:</p> <ul style="list-style-type: none"> • Both customers meet the eligibility criteria for a mutual exchange and • Have a need to move to another public housing property • The properties are not high demand properties due to their features and/or location • Approving the mutual exchange will not have an unreasonable impact on other customers waiting for social housing <p>Further information eligibility criteria Mutual exchanges application evidence exceptional circumstances</p>	Housing Officer
2	Manual	<p>Arrange to inspect the properties to identify any general property maintenance or health and safety issues that should be addressed prior to the mutual exchange occurring.</p> <p>Complete the Condition of Premises for transfer prior to approval of the exchange and action any maintenance issues as per the usual process</p>	Housing Officer
3	Manual	<p>Arrange to inspect the properties to identify any general property maintenance issues as well as any health and safety concerns that should be addressed prior to the mutual exchange occurring.</p> <p>Complete the Report on Condition of Premises for Transfer prior to approval of the exchange and action any maintenance issues as per the usual process.</p>	Housing Officer

No	System	Instruction	Minimum Delegation
4	Manual	<p>Consider the customer's individual circumstances, whether they are eligible for the mutual exchange and have a need to move and any evidence they provide to make a recommendation about the mutual exchange.</p> <p>Further information</p> <p>Mutual exchanges - eligibility criteria</p> <p>Mutual exchanges application</p> <p>Mutual exchanges - evidence</p> <p>Mutual exchanges - exceptional circumstances</p>	Housing Officer
5	Manual	Send the recommendation to the delegated officer for consideration	Housing Officer

PROCESS STEPS

CONTEXT

**COHORT INFORMATION
RESOURCES & TRAINING**

Mutual exchange - policy

To be advised

Mutual exchange - application

Each customer must complete and sign the Application for Mutual Exchange form agreeing to :

- accept the property they move into in its current condition
- complete the RTA Form 1a and RTA Form 14a (Entry and Exit Condition Reports) if the mutual exchange is approved.

Mutual exchange - evidence to support the request

Each customer must provide the following to support their request:

- completed and signed Application for Mutual Exchange
- information as to the reason for their need to move to another public housing property
- evidence to support their need to move, as required.


ASSESSING MUTUAL EXCHANGE REQUEST

PROCESS STEPS

CONTEXT

COHORT INFORMATION

RESOURCES & TRAINING

No	System	Instruction	Minimum Delegation						
	Trigger	Two customers have requested to exchange properties and a recommendation has been made by the Housing Officer.							
1	Decision	<p>Decide if the customer's individual circumstances, their eligibility for the mutual exchange, their need to move and the demand for the property meet the conditions for approving the mutual exchange.</p> <p>Both customers must be eligible for the mutual exchange to be approved. If only one customer is eligible, decline the request.</p> <table border="1" data-bbox="427 1294 724 1547"> <thead> <tr> <th>If...</th> <th>then...</th> </tr> </thead> <tbody> <tr> <td>The request is approved</td> <td>Go to Step 6</td> </tr> <tr> <td>The request is not approved</td> <td>Go to Step 7</td> </tr> </tbody> </table> <p>Further information Mutual exchanges - eligibility criteria Mutual exchanges application Mutual exchanges - evidence Mutual exchanges - exceptional circumstances</p>	If...	then...	The request is approved	Go to Step 6	The request is not approved	Go to Step 7	Delegated Officer
If...	then...								
The request is approved	Go to Step 6								
The request is not approved	Go to Step 7								
2	Manual	<p>For approved requests:</p> <ul style="list-style-type: none"> • Contact both customers to advise of the decision and next steps • Arrange a sign up appointment with both customers • Send the Mutual exchanges approval letter to both customers <p>Go to Step 9</p>	Housing Officer						