



HOMES Enquiries

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Introduction

Purpose

This training shows you how to perform searches in HOMES when there are business related enquiries from clients. It will cover the different kinds of enquiries made by clients, how they are handled by the staff, the paths that can be taken while handling an enquiry and all other related topics that can be accessed while on a particular enquiry.

Intranet information

- Process and procedure flow charts are available via the intranet and can be located here [\[insert hyperlink here\]](#)
- Business rules; authorities, approvals or processes which affect this task are available via the intranet and can be located here [\[insert hyperlink here\]](#)

Prerequisites

Before commencing this training you must have the following:

- A sound knowledge of current Housing NSW business policies, processes and procedures for your role
- Experience in the use of the IHS system for your role.
- The Overview training session completed
- The Intranet and System Help training session completed

Overview of Enquiries

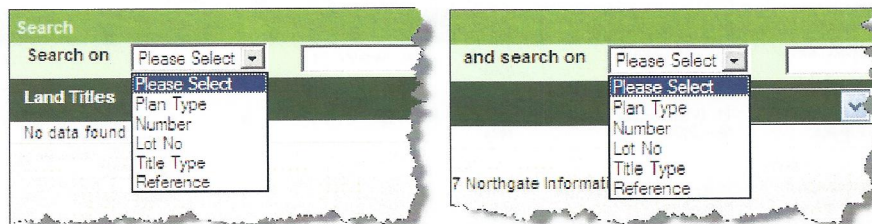
Whenever a client calls or walks in with an enquiry, the staff will first need to identify what type of enquiry it is and then perform a search based on the type of enquiry. This session will show you how to perform searches in HOMES when there are business related enquiries from clients.. HOMES offers two levels of Search functionality, a simple **Search** or Query and an **Advanced Search** or Detail.

Search



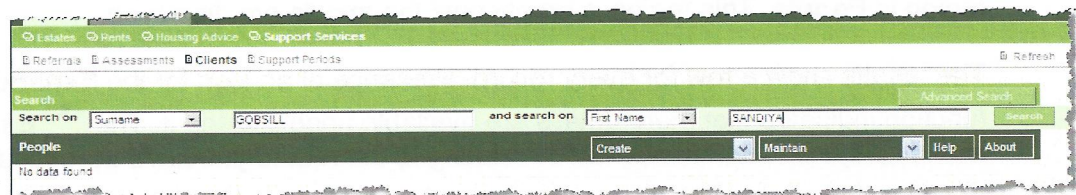
The simple **Search** provides access to a limited amount of search criteria. The button appears above the regions on each of the summary pages.

The simple Search is used to find records that meet your search criteria and provides two lists each with the list of the same criteria. The following images show two fields and their criteria to search on Land Titles. For example, you can search on land titles of a particular Plan Type and Title Type. Any data typed into the text field needs to follow the format specified under **Preferences** (see Application menu). For possible values the data may take, please access **Help**.



If this search does not provide you with a sufficient number of filters, use the **Advanced Search** button which will allow you to enter more search criteria.

How to Perform a Simple Search



The People Summary Page

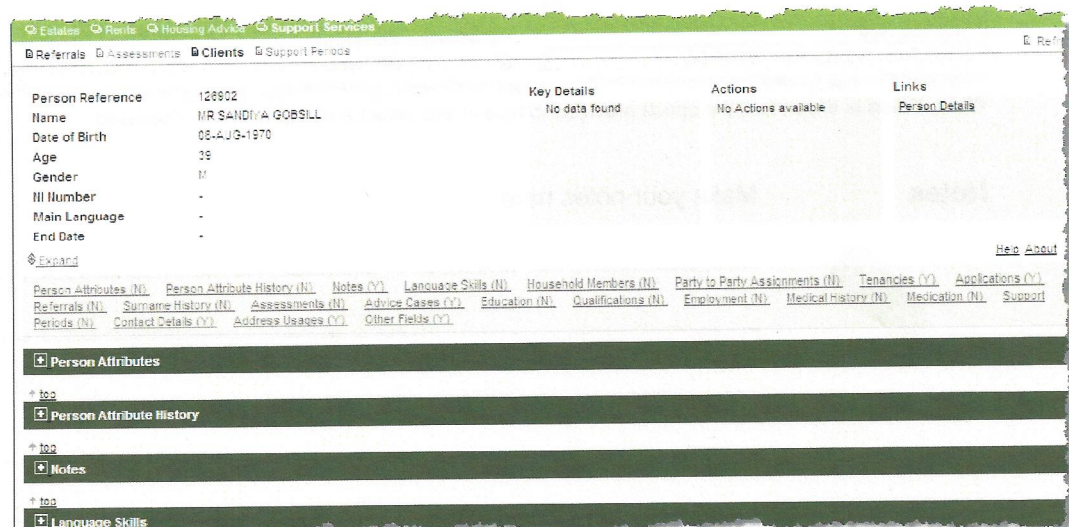
1. Select a **Product Area** e.g. **Support Services**.
The default summary page with the related business areas is displayed.
2. Select a **Business Area** e.g. **Clients**.
The **People** summary page is displayed.

- via **Person Details** in the region **Actions** list for the record, or
- via **Person Details** in the region **Maintain** list.

Accessing Multiple Detail Pages

To view details on several records, in the **Select** column, check the boxes in the desired rows and then pick **Person Details** from the **Maintain** list. In the resulting page, use **Next** and **Prev** to move between the multiple records.

Detail Page



The Detail page contains a Context Block, Quick links to Region Banners below the Context Box, and various Region banners that can be expanded and closed

The **Context Block** shows some basic information on that record. It also contains **Actions** that can be performed on the record as a whole. For example, **Update Person** which was accessible from the **Actions** list in the Summary page is also available from the Context Block in the Details page. From the **Links** area of the Context Block, it is possible to navigate to other areas of the system whilst retaining the selected client's details. For more details on Actions and Links, please refer to *Navigation* under the *HOMES Overview* session.

Under the Context Box there are the quick links for each of the region banners beneath. Always use these quick links rather than scrolling down to the region banner you need to view. The region banners display the, region name, links to any business processes available from the region e.g. **Create** or **Maintain** and a link to the online help for the region.

In addition to the several topic specific region banners, there is a banner for **Notes**. Notes are used to log additional information about records and are a handy feature for the client staff to notify each other and be up to date on any client details. Notes can be used for recording data that cannot be recorded on

Advanced Search

The Advanced Search provides additional search facilities with more filters.

Note: The Advanced Search is not available in all cases.

How to Perform an Advanced Search

1. Select a **Product Area** e.g. **Estates**.
The default summary page with related business areas is displayed.
2. Select a **Business Area** e.g. **Parties**.
The **People** summary page is displayed.
3. Click **Advanced Search**.
A new page is displayed with more filters for the search.
4. Enter your appropriate search criteria. For example, to search on an address:
 - Click the **Address** field search icon indicated by the magnifying glass. The address **Search Criteria** subregion is displayed.
 - Enter your search criteria e.g. Town **Cabramatta**, Area **NSW** and Post Code **2166**.
 - Click **Search**.

The results are displayed in the region from which the search was called.

The Advanced search page for Estates > Parties. Click the search icon next to the Address field to be able to enter criteria for the address.

Wildcard Searches

You can use wildcards and comparison operators in your search criteria where the exact criteria are unknown.

The Percent (%)

The percent sign represents any number of characters. Examples:

STEVEN% could retrieve STEVEN or STEVENS or STEVENSON or STEVENTON.

STE%EN could retrieve STEVEN or STEPHEN or STEFFEN

%MOUTH could retrieve EXMOUTH or PORTSMOUTH or SIDMOUTH

%MAY-1999 would retrieve transactions in May 1999

The Underscore (_)

The underscore sign represents a single character. Examples:

2_ could retrieve 20 - 29 and 2a, 2b

3__ could retrieve 300 - 399 and 30a, 30b

10-MAY-199_ would retrieve transactions on 10th May in 1990 - 1999

ME __ could retrieve MERR or MEAR or MEIR

Comparison Operators

The greater than (>) and less than (<) operators can also be used when searching for and retrieving data. Examples:

>350 would retrieve 351 upwards

>31-DEC-1999 would retrieve information FROM 1st January 2000

<200 would retrieve 0 – 199

<20-SEP-2000 would retrieve information UP TO the 19th September 2000

Note: Query screens default to = (equals) in no operator has been specified.

Identify Enquiry Type

Often client service staff will need to retrieve information for various reasons. For example, a call may be received from an applicant or a tenant or just about anyone to get housing advice. Typically the first thing that the client service staff will do is to check if the person already exists in the Housing database. If so, they verify the context in which the person exists. If the person does not already exist in the database, then the staff may create an **Advice Case** and provide a **Housing Option** solution. This procedure will be described later in this section.

Next, the staff will use the **Search** tool – simple or advanced to access details of the enquiry such as information about a client, an application, a tenancy, a property, accounts, repairs etc.

The following sections detail how the search tool can be used to elicit information on various common enquiries.

Note: There are many types of enquiries. Not all are described within this guide but the search method remains the same as long as there are search criteria available for the data.

Enquiries on Tenancy and Related Matters

The first step that the client service staff takes is to try and search for the person using name or some other available data for the search criteria. If the person already exists in the database, their record will be displayed.

When the enquiry relates to a **Client**, **Tenancy**, an **Application**, or a **Household** the following steps can be followed.

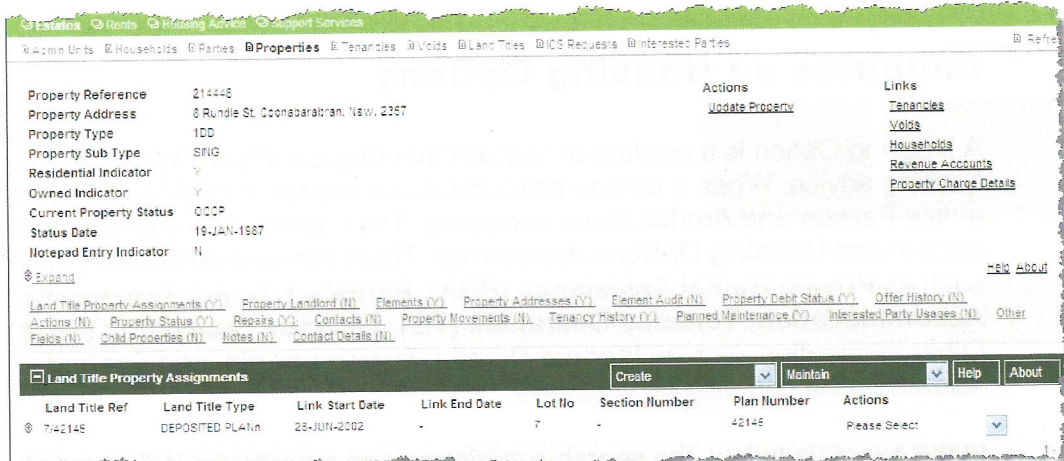
In the example below, the scenario is that someone has taken a phone call and scribbled a message down with the name and date of birth of a male client. However, for the client staff member who reads the message later, not all letters in the name of the client are completely legible. So the officer executes a search for all males born on 15th December 1970 and hopes to pick up the correct spelling of the name.

1. Select **Estates > Parties**.
The **People** summary page is displayed.
2. Enter selection criteria such as **Date of Birth** and **Gender**. For example,
 - Enter date of birth **15-DEC-1970**, Gender **M**.
 - Click **Search**.

The results display on the **People** summary page.

Notes Make your notes here





Detail page showing Links within the Context Box, under it the quick links for the region banners and the first region banner

Notes

Make your notes here



5. From the Details page shown in the image below, you can access other related information in one of the following ways via

- **Region banners** such as Housing Options, Income Details, Appointments, Tenancy Associations and much more. In the example below, the housing option shown is a Bond.
- **Links** in the **Context Box** that takes you to other system areas.

To view details of associated advice cases, their history and reasons, select one of the links **Advice Case/ Advice Case Status or Action History or Advice Case Reason**.

To view details of applications, select the **Applications** link.

To view details of the person, select the **Person Details** link.

Reference	Approached	Correspondence Name	Status	Date	Notes Ind	Homeless Ind	Direct Intervention Ind	Actions	Select
69796	07-DEC-1999	PAMELA CLARE FREWER	CLO	14-OCT-2000	N	N	N	Please Select	<input type="checkbox"/>
69796	07-DEC-1999	PAMELA CLARE FREWER	CLO	14-OCT-2000	N	N	N	Please Select	<input type="checkbox"/>

Advice case Summary page

Case Reference	69796	Actions	Links
Approached	07-DEC-1999	Create ICS Request	Advice Case
Correspondence Name	PAMELA CLARE FREWER	Assess an Advice Case	Applications
Contact Address	52 Colonial Dr Bligh Park Nsw 2756	Create ICS Request	Person Details
Case Address	2 29 Collith Ave South Windsor Nsw 2756	Assess an Advice Case	Advice Case Status/Action History
Main Reason	ASSIST		Advice Case Reason
Number of Reasons	1		
Primary Outcome	-		
Status	CLO		
Status Date	14-OCT-2000		
Direct Intervention	N		
Client Notes	N		

[Case People \(1\)](#)
[Reasons \(1\)](#)
[Housing Options \(2\)](#)
[Appointments \(1\)](#)
[Letters \(1\)](#)
[Task Manager \(1\)](#)
[Documents \(1\)](#)
[Application Associations \(1\)](#)
[Tenancy Associations \(1\)](#)
[Action Associations \(1\)](#)
[Interested Party \(1\)](#)
[Payments \(1\)](#)
[Income \(1\)](#)
[Income Details \(1\)](#)
[Lettings \(1\)](#)
[Address Usages \(1\)](#)

Case People
 Reasons

Detail page showing Links within the context Box, under it the quick links for the region banners and the first two region banners

Reference	Housing Option	Admin Unit	Status Date	Status	Total Time	Actions
90356	BOND	AT813	14-OCT-2000	COMPLETED	00 00	Please Select

Expanded region banner, **Housing Options**



Enquiries – Learner Practice 2

Refer to your ***Learner Practice Activity Sheet 2*** and in the HOMES Training Environment complete the activity.



Workplace Activity

Refer to your **Workplace Activity Sheet** and in the **HOMES Sandpit** you are required to complete the activities prior to the commencement of your next training session in the **Sandpit Environment**, as per the logon details provided.

Notes

Make your notes here





Enquiries – Learner Practice Exercises

Prerequisites:

- You have logged into HOMES Training Environment and your session is currently active and
- You have pressed the **ALT+Tab** keys to move to the HOMES application, if required.

Learner Practice 1

1a. Reinforce use of Notes

For a **Person Reference** 126092 (name, Rocaya Minote) view the **Notepad**. Record the wording of the note in the below space and whether it is a highlighted note.

Notes

Make your notes here



1b. Given partial data using wildcards, perform a simple Search and navigate multiple records

Using **Estates > Parties**, perform a wild card search for all surnames containing **Shank**. View the resulting records.

- On a record, view **Person Details** via the **Actions** list.
- Go back to the Summary Page
- Select a record and view **Person Details** via the **Maintain** list.
- Go back to the Summary Page
- Select multiple records and view **Detail** pages for them simultaneously. Use the **Next** and **Previous** buttons to navigate between records.

Learner Practice 2

2a. Identifying type of search

Find out what were the rents on Property with **Reference Number 214251**. In your participant guides, make a note of what rent changes are listed by date. Read it out if called upon.

Notes

Make your notes here



If you are in a **Virtual Classroom** training session return to the Elluminate Virtual Classroom, then if

- You need help, click the **raise your hand** icon.
- You have completed your activity, click the **tick** icon.

If you are in **Classroom Training** session wait for your Trainer's next instruction.