Landlord User Guide v1.9

mri social housing

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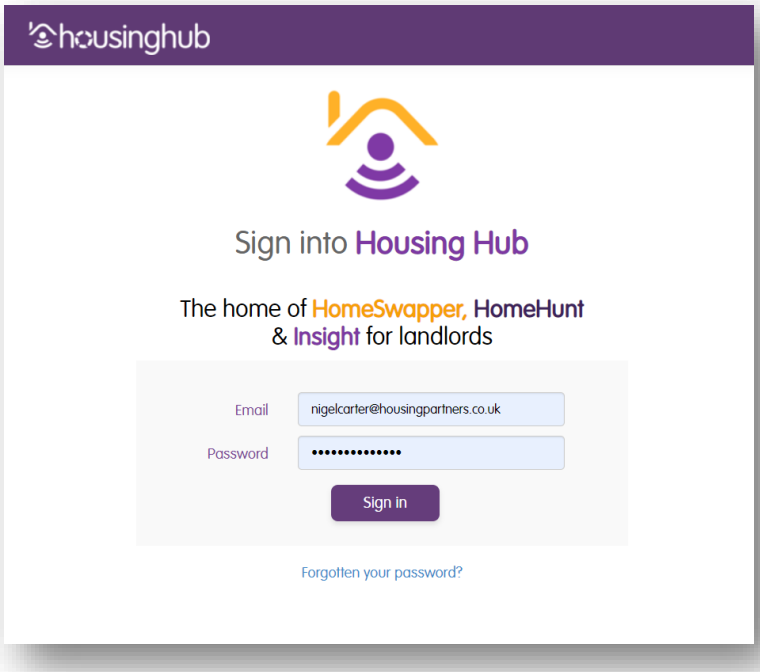
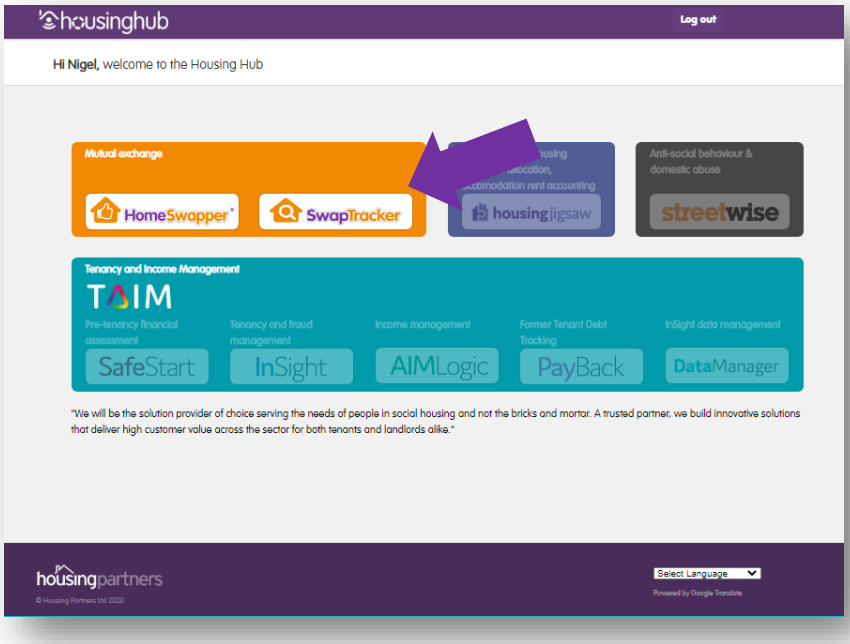
INTRODUCTION

Logging in

SwapTracker is accessed by logging into the "Housing Hub".



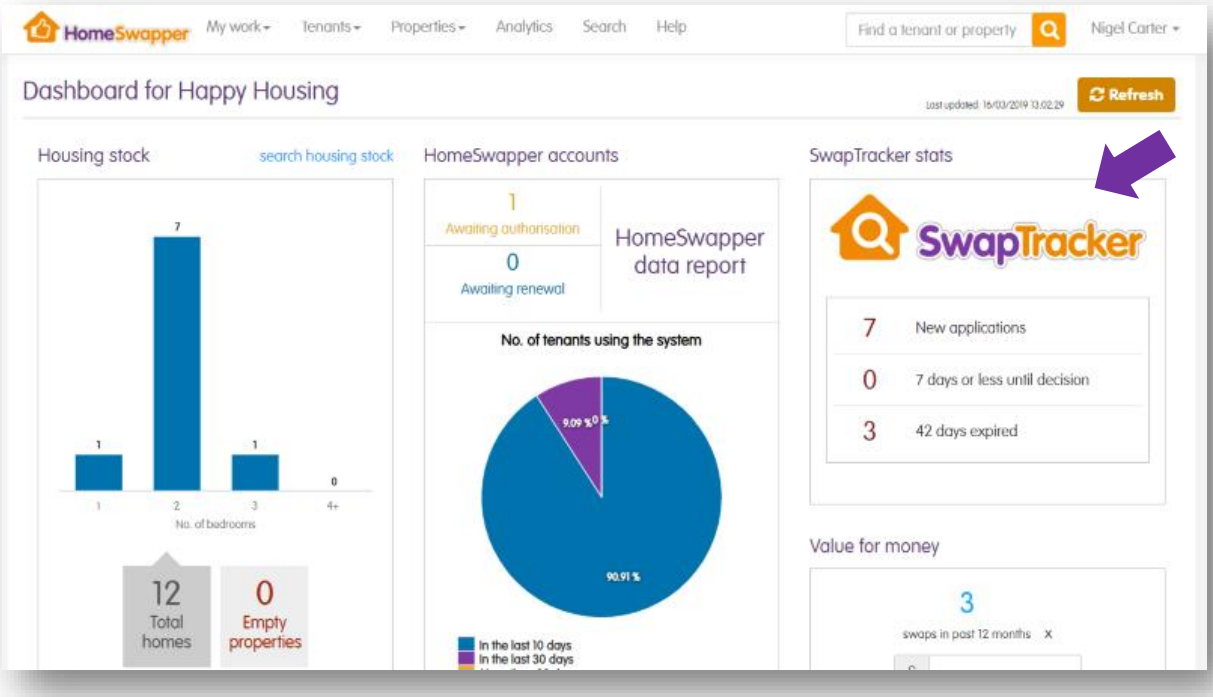
If you have a SwapTracker subscription, a new panel is shown on the list of tools available. Click this to go to your SwapTracker dashboard.



HomeSwapper

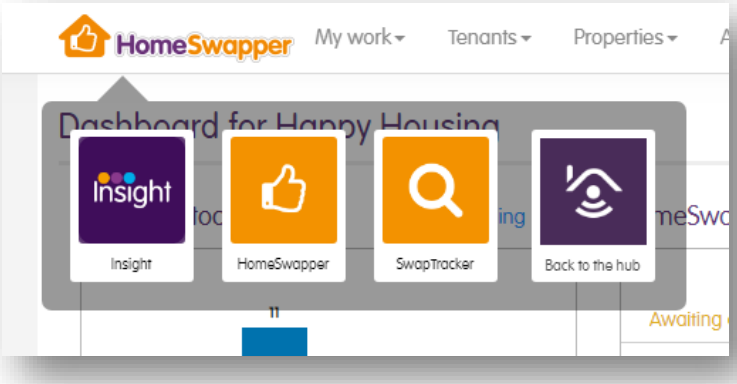
Your landlord dashboard in **HomeSwapper** will also have a "SwapTracker" panel giving you key stats about any MX applications that require your attention.

Clicking on any of these will take you directly to SwapTracker.

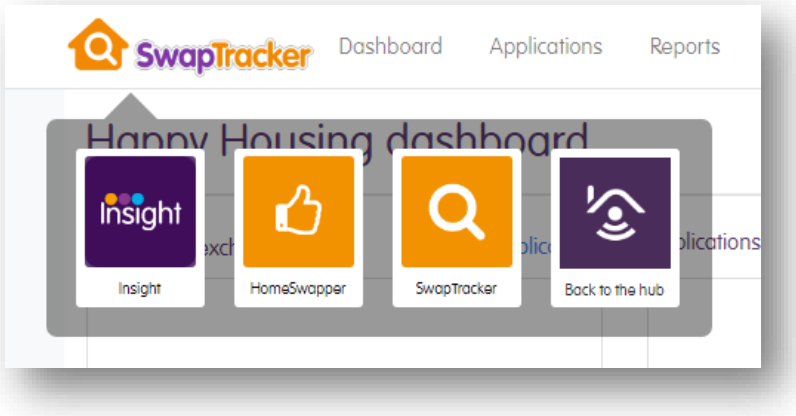


Moving between HomeSwapper and SwapTracker quickly

When in HomeSwapper, clicking on the logo will show a menu of tools you have subscriptions for. Click on any of these to go straight there.



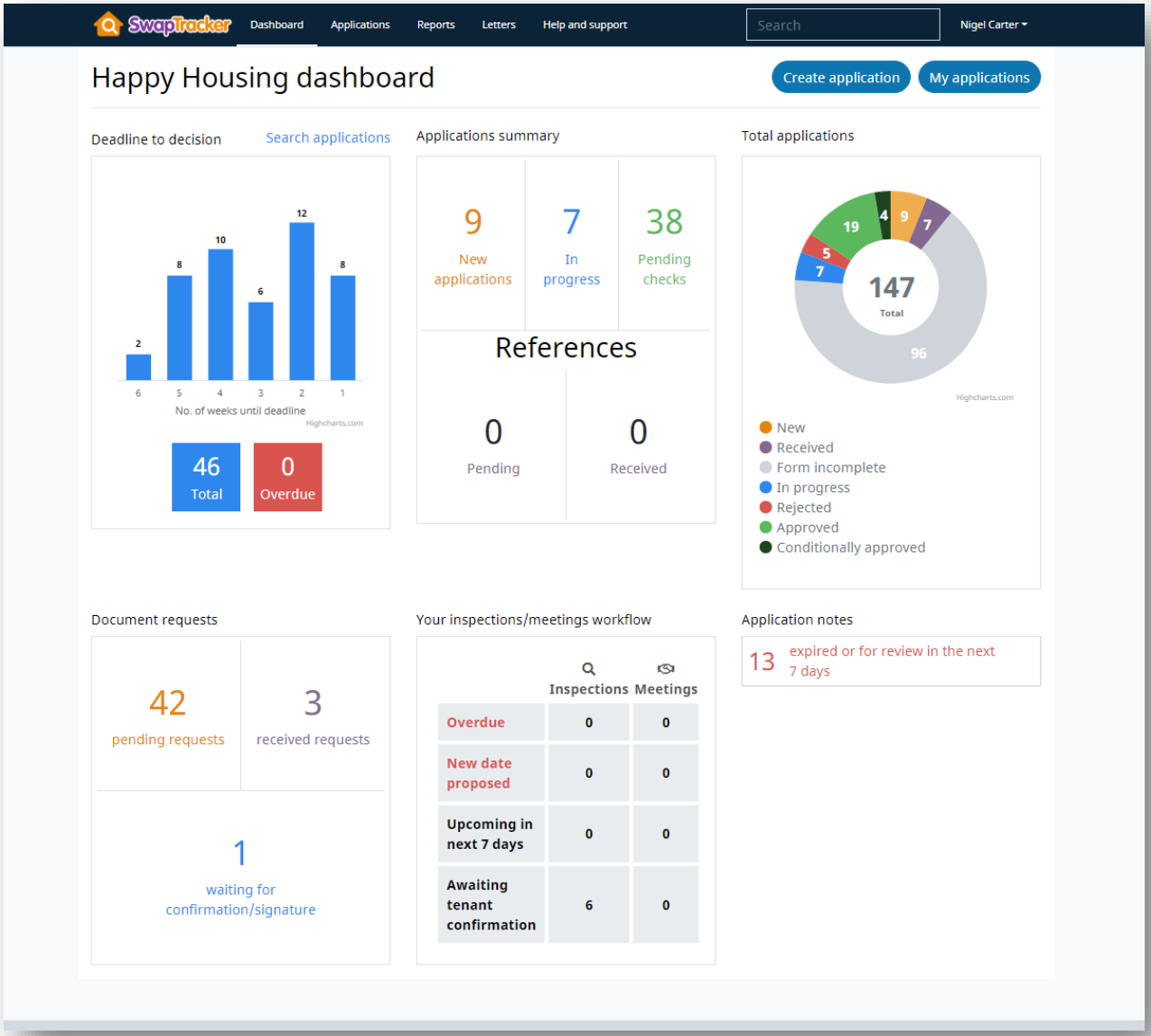
When in SwapTracker, clicking on the logo will also show a similar menu. Click on any of these to go straight to that tool, e.g. if you need to get back to HomeSwapper.



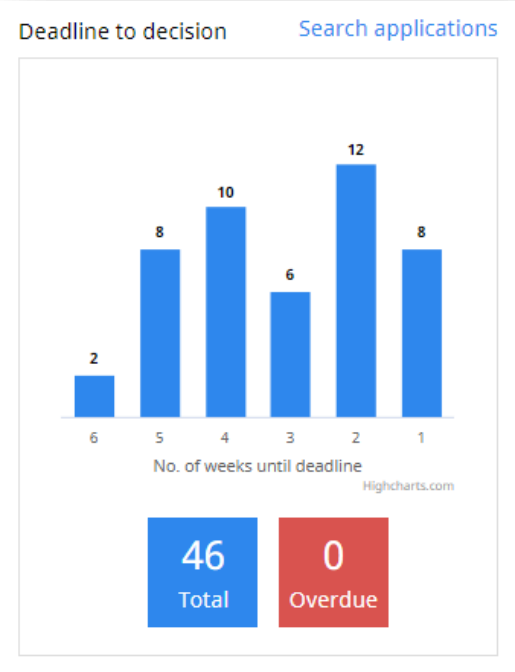
Clicking the logo again, hides these menus.

YOUR SWAPTRACKER DASHBOARD

The SwapTracker dashboard for your organisation shows all the key information regarding applications, inspections, checks, etc. as well as any actions requiring your attention.



Deadline to Decision



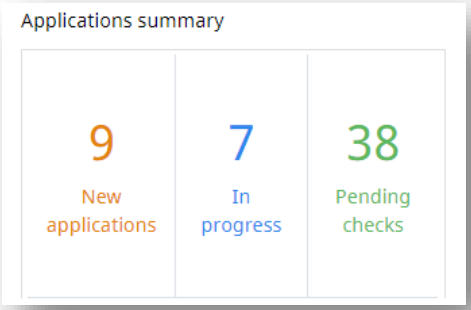
The "Deadline to decision" chart shows how many applications you have in progress.

These are broken down by the number of weeks remaining before the 42-day deadline for a decision expires.

Clicking on any of the totals will take you to the list of applications they refer to.

Applications Summary

The "Applications summary" boxes show:

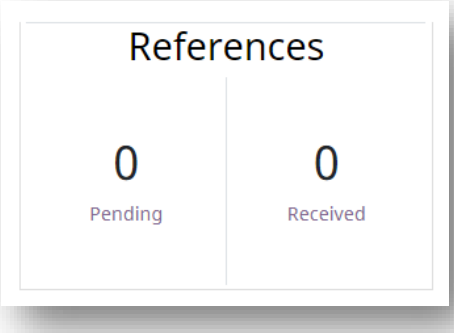


- New applications – the number of applications submitted by the tenant and have a "new" status.
- In progress – the number of applications with a status of "in progress".
- Pending checks – any outstanding tenant checks which have not been completed.

Clicking on any of the totals will take you to the list of applications or checks they refer to.

Reference Requests

The "Applications summary" box also includes workflow for your reference requests:

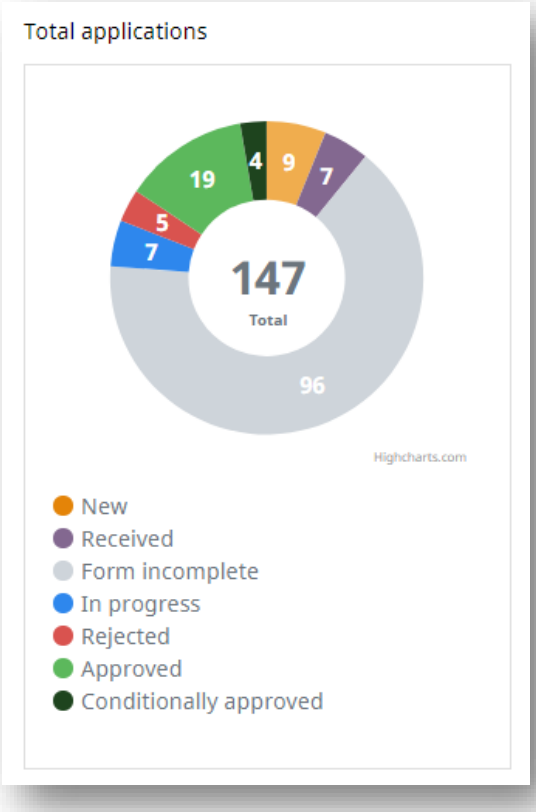


- Pending – the number of reference requests you have outstanding, i.e. the request has been sent to the landlord, but the completed reference has not yet been received.

- Received – the number of references that have been received and are ready for you to review.

Clicking on any of the totals will take you to a list of the reference requests they refer to.

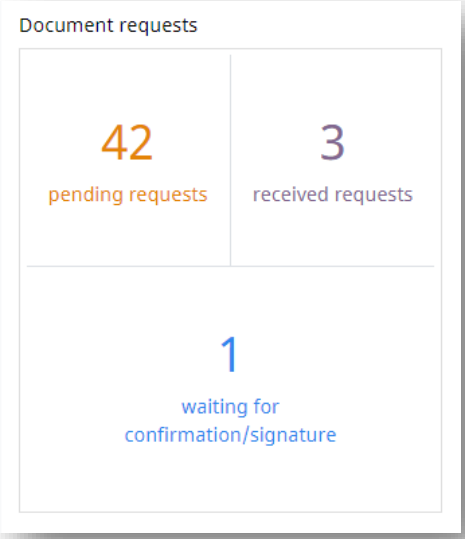
Total Applications



The "Total applications" chart shows the number of MX applications you have at each stage of the process.

Clicking any of the sections of the "doughnut" will take you to the list of all your applications with that status.

Documents



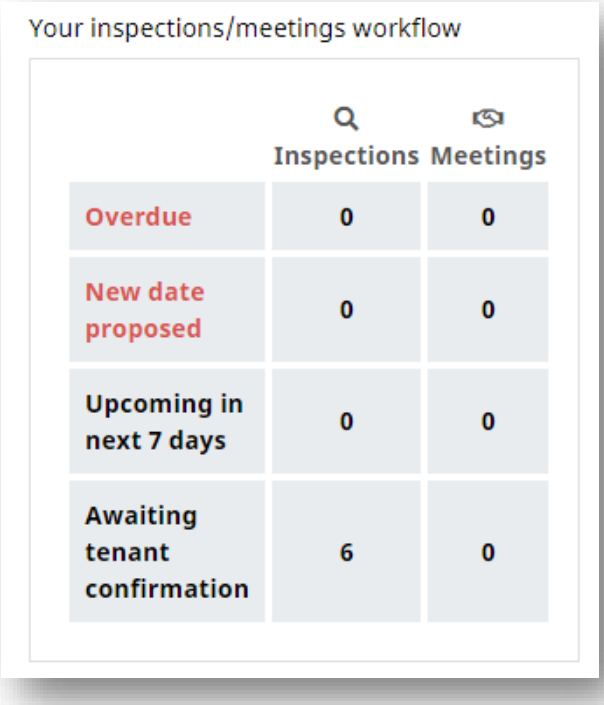
The "Document requests" boxes show:

- Pending requests – all document requests you have sent to tenants that have not yet been supplied.

- Received requests – all documents supplied by tenants that you have not yet checked and confirmed.

- Waiting for confirmation/signature – all documents you have shared with tenants where you are waiting for them to confirm receipt. See Requesting confirmation / signature from the tenant

Inspections/Meetings workflow



	Inspections	Meetings
Overdue	0	0
New date proposed	0	0
Upcoming in next 7 days	0	0
Awaiting tenant confirmation	6	0

This workflow shows any inspections or meetings that are:

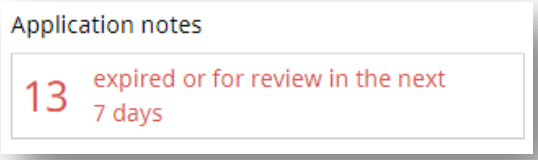
- Overdue – the scheduled date has passed, and they have not been set to "Complete".

- New date proposed – the tenant has suggested an alternative date/time. Don't worry, this is an optional setting!

- Upcoming – the scheduled date is within the next 7 days.

- Awaiting tenant confirmation – the tenant has not yet confirmed the date/time.

Application Notes



If you add a "review date" against any application notes, they will appear in this workflow when the review date is within the next 7 days (or has passed).

APPLICATIONS

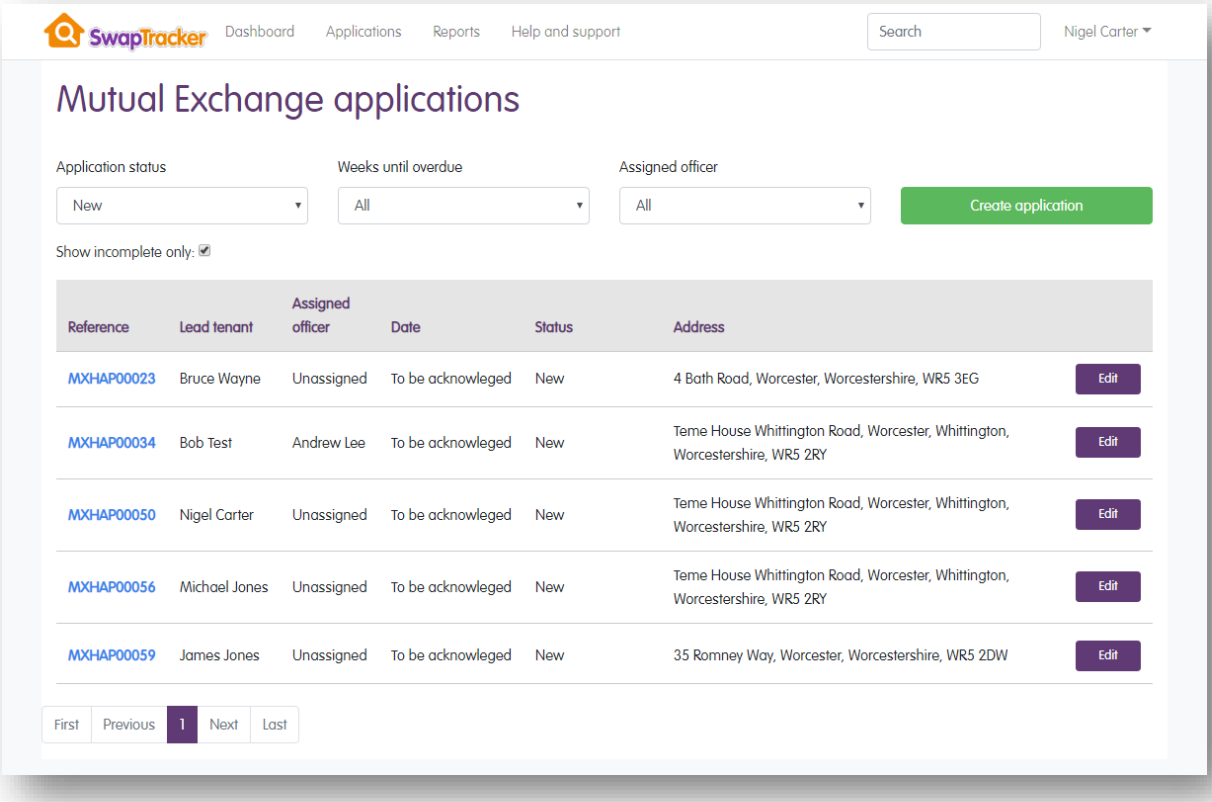
What do the Statuses mean?

A SwapTracker application can have one of the following statuses:

Form Incomplete	The application form has not been completed and submitted to you. When the tenant completes and submits the form the status will change to "New".
New	The application form has been submitted by the tenant. You should now review the form and check you are happy with it, e.g. have they entered all the information you need? If everything is okay, you should change the status to "Received". (See Dealing with "new" applications) If there are any issues with their form, you can set it back to "Form Incomplete" for the tenant to make the necessary changes and resubmit. (See Problem with an Applicant's Form?)
Received	You have indicated that you have received the form. (See Dealing with "new" applications) Note: the 42-day process will not start until you set the application to "In Progress".
In Progress	The mutual exchange application is now in progress: • You have received all forms related to the application • The 42-days for a decision have now commenced (See Setting the Application to "In Progress")
Approved	The application has been approved. (See Approving an application)
Conditionally Approved	The application has been conditionally approved and you will be prompted to provide details of the conditions involved. (See Conditionally Approving an application)
Rejected	The application has been refused and you will be prompted to provide details of the why. (See Refusing an application)
Cancelled	The application has been cancelled by either the tenant or your organisation.

Applications List

The "*Mutual Exchange applications*" list shows the applications for your organisation.



This can be filtered by:

- The status of the application
- The number of weeks until the decision is required (if applicable)
- The assigned officer. See Assigning Applications
- Show incomplete only – if this is ticked (it is ticked by default) the list of applications will **not** include those that have been set to "complete". See Setting an Application to Complete

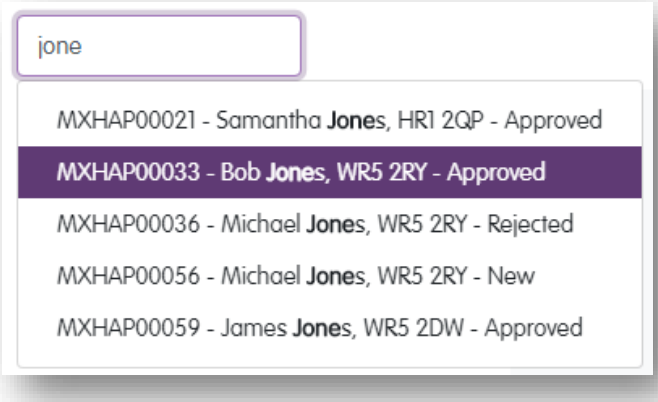
Clicking "Edit", or the SwapTracker Reference number, will take you to the Application Summary page.

Searching for Applications

In the SwapTracker header bar there is a search box which can be used to find specific applications.

As you type, a list of matching applications is shown.

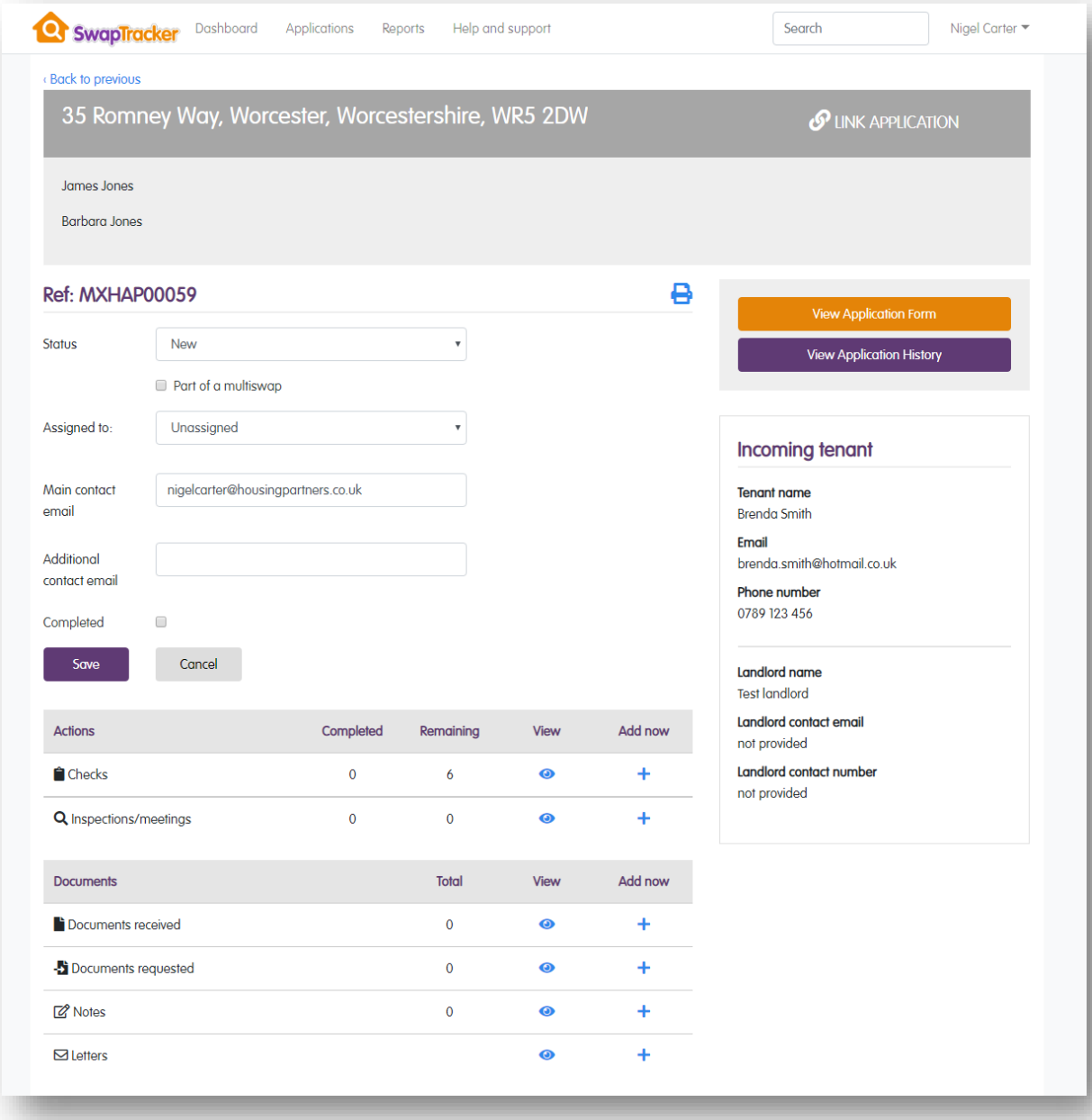
Clicking on any of these will take you to their "*Application Summary*" page.



The search checks for tenant name, any part of their address and the SwapTracker reference number.

Application Summary

The "*Application Summary*" page provides you with a complete overview of an application.

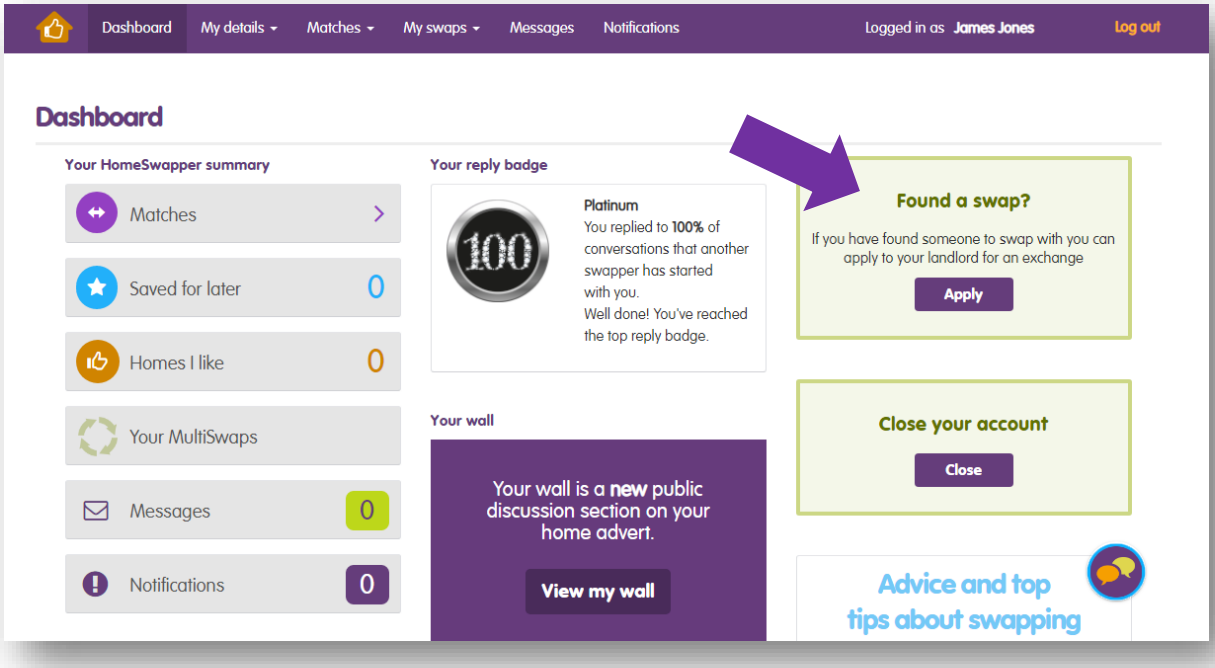


This is the main page for performing all actions against an application, e.g. changing the status, adding/editing checks, scheduling meetings, etc.

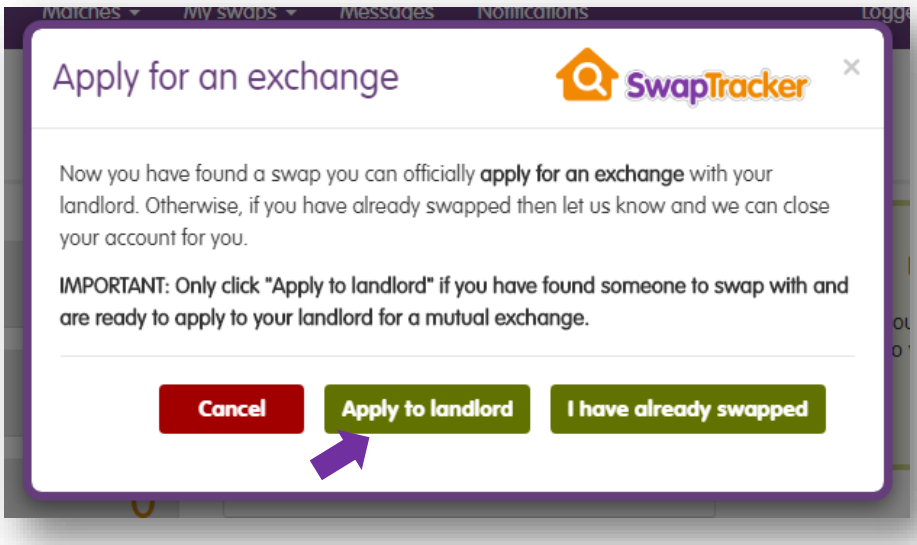
HOW TENANTS APPLY (USING HOMESWAPPER)

Your tenants can apply directly from HomeSwapper if they have a HomeSwapper account.

On their dashboard there is a "*Found a swap?*" button they can use to apply:



Clicking the "*Apply to landlord*" button will start the SwapTracker application process for the tenant and they are taken to the SwapTracker application form.

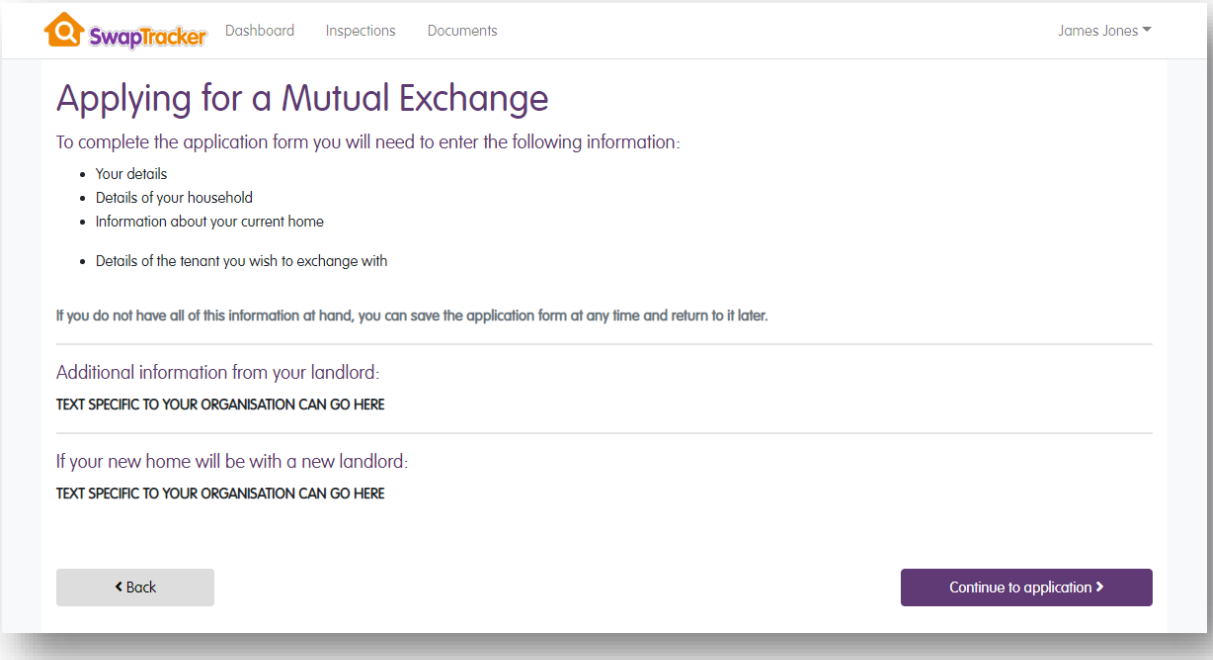


The SwapTracker application form

Introduction

The first page of the form gives the tenant details of the information they will need to provide.

However, they can save the form and return to it later at any time. It does not have to be completed all in one go.



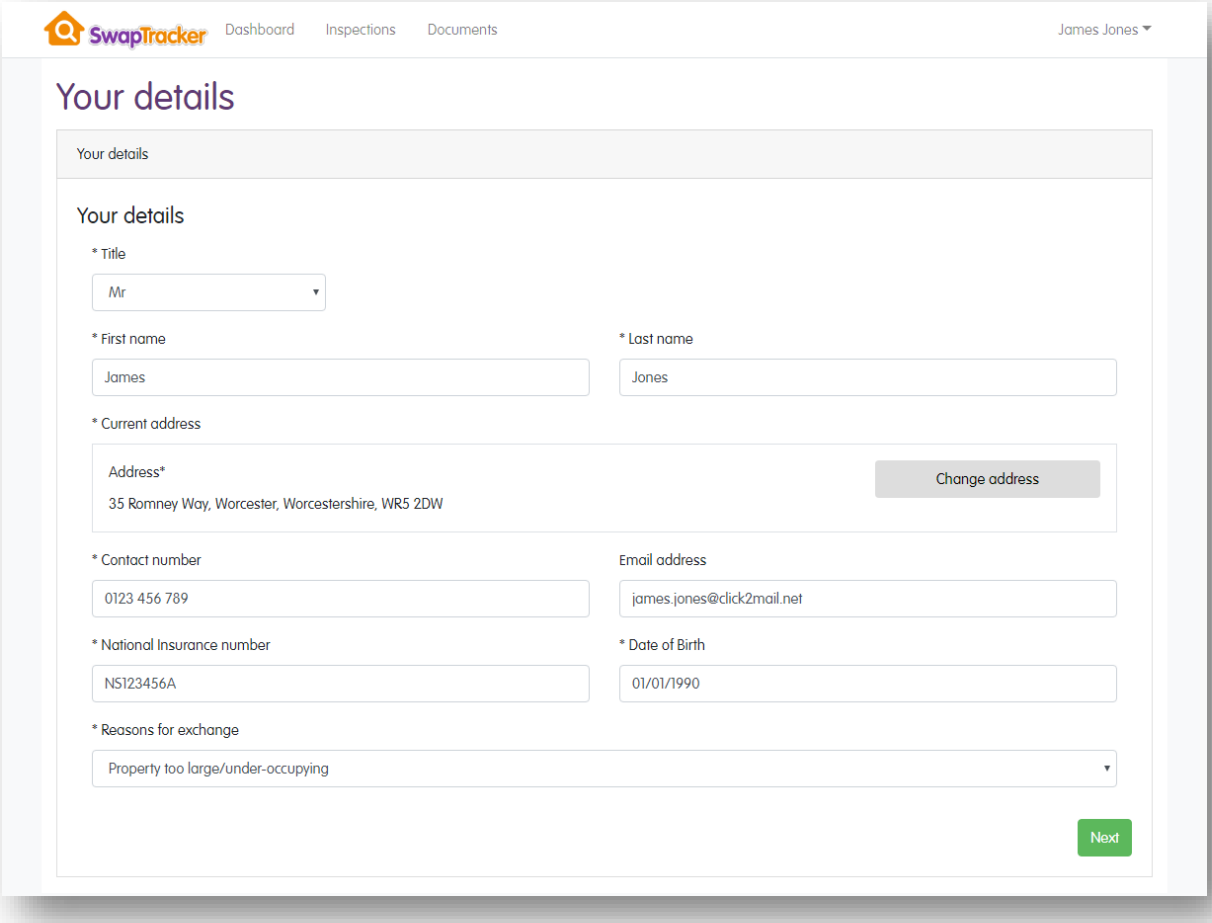
At the bottom of the page are the "*Additional information from your landlord*" and "*If your new home will be with a new landlord*" sections. You can use these to inform the applying tenant of anything specific to your organisation, e.g. Do you have any local connection rules?

If you would like to supply some text for this, please contact Housing Partners and we can configure this for you.

Note: if no text is specified these sections are not shown.

1. Your details

The tenant must enter details of themselves as the main applicant. This includes their reason for wanting to exchange.

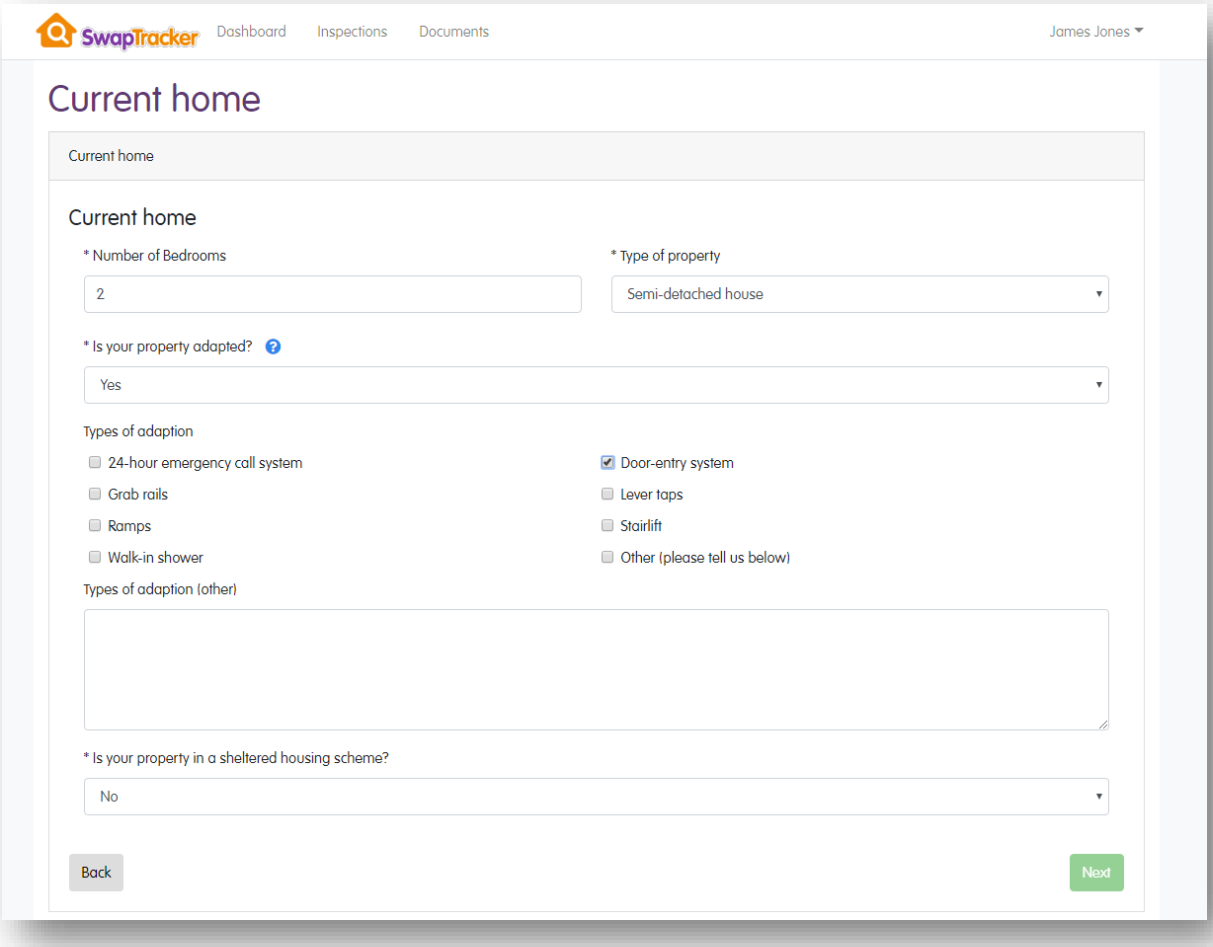


If the tenant is applying from HomeSwapper, some of this page is pre-populated as we already have this information:

- Tenant name
- Address
- Contact number
- Email address

2. Current home

The tenant must enter details of where they are currently living.

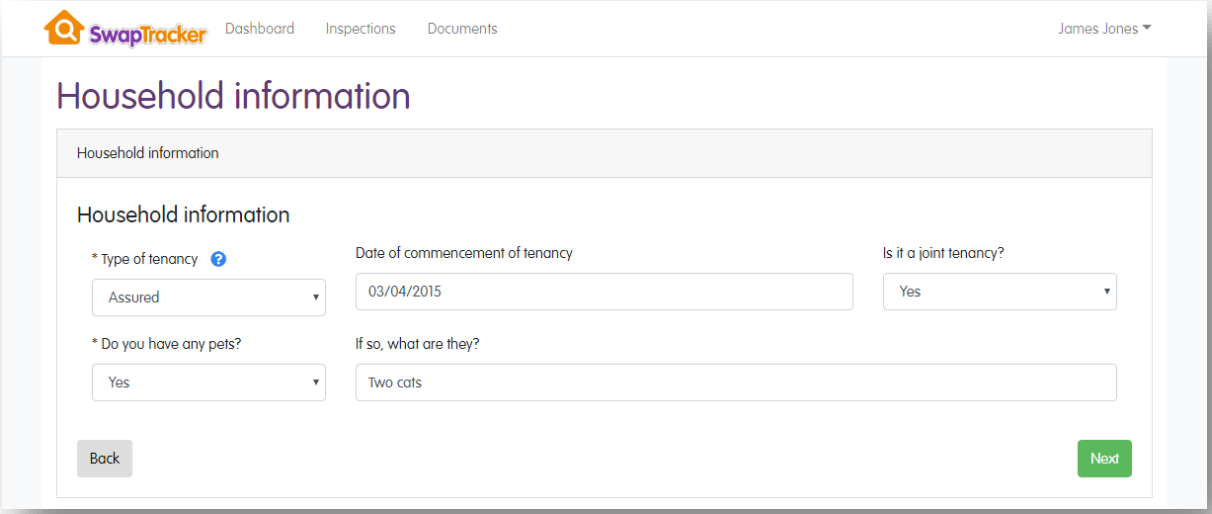


If the tenant is applying from HomeSwapper, some of this page is pre-populated as we already have this information:

- Number of bedrooms
- Type of property

3. Household information

The tenant must enter details of their current tenancy and whether they have pets.

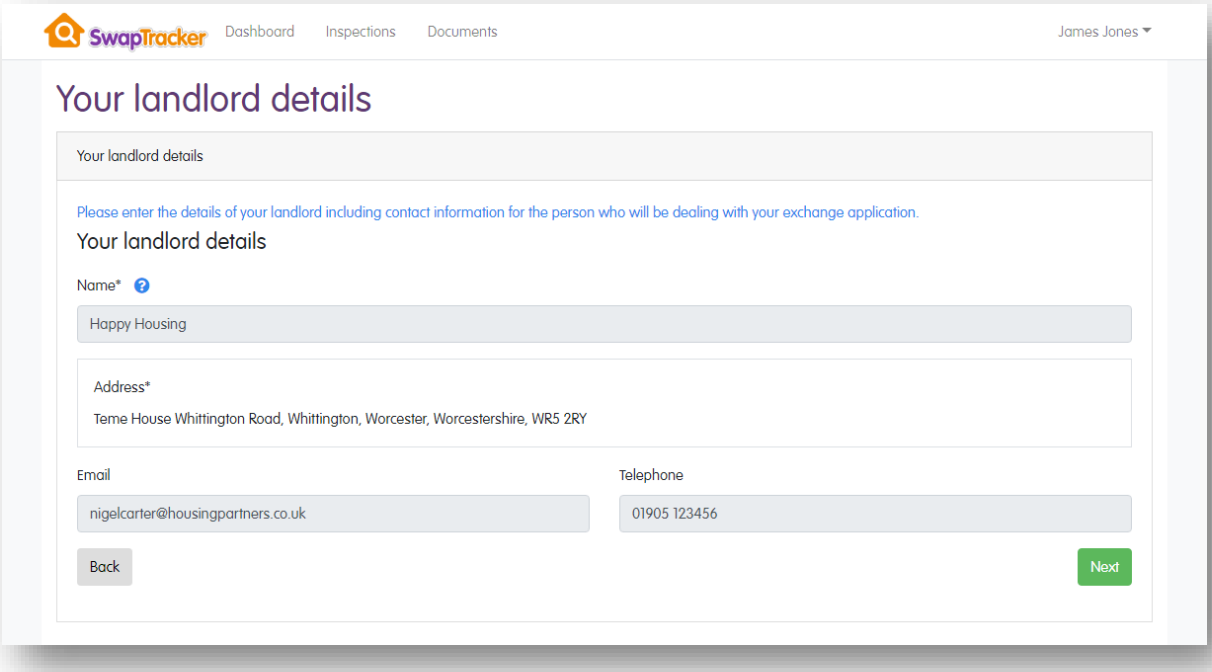


The examples in this User Guide show the standard SwapTracker application form. If there are any additional questions or sections your organisation requires, please contact Housing Partners and we can configure these for you.

Please note: we may not be able to replicate your own form exactly but can configure your version of the SwapTracker form to be as close as possible.

4. Your landlord details

The tenant must enter details of their landlord.



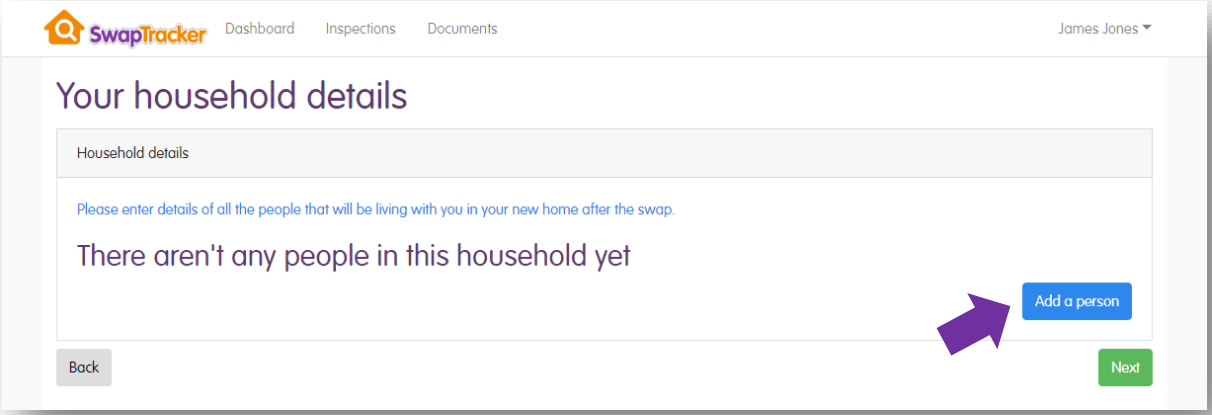
If they are applying from HomeSwapper we already know who their landlord is and so this page is pre-populated and they can simply click "Next".

Otherwise the tenant will need to select their landlord from the list provided.

If we have MX contact details for this organisation, the address, email and telephone are pre-populated from our database.

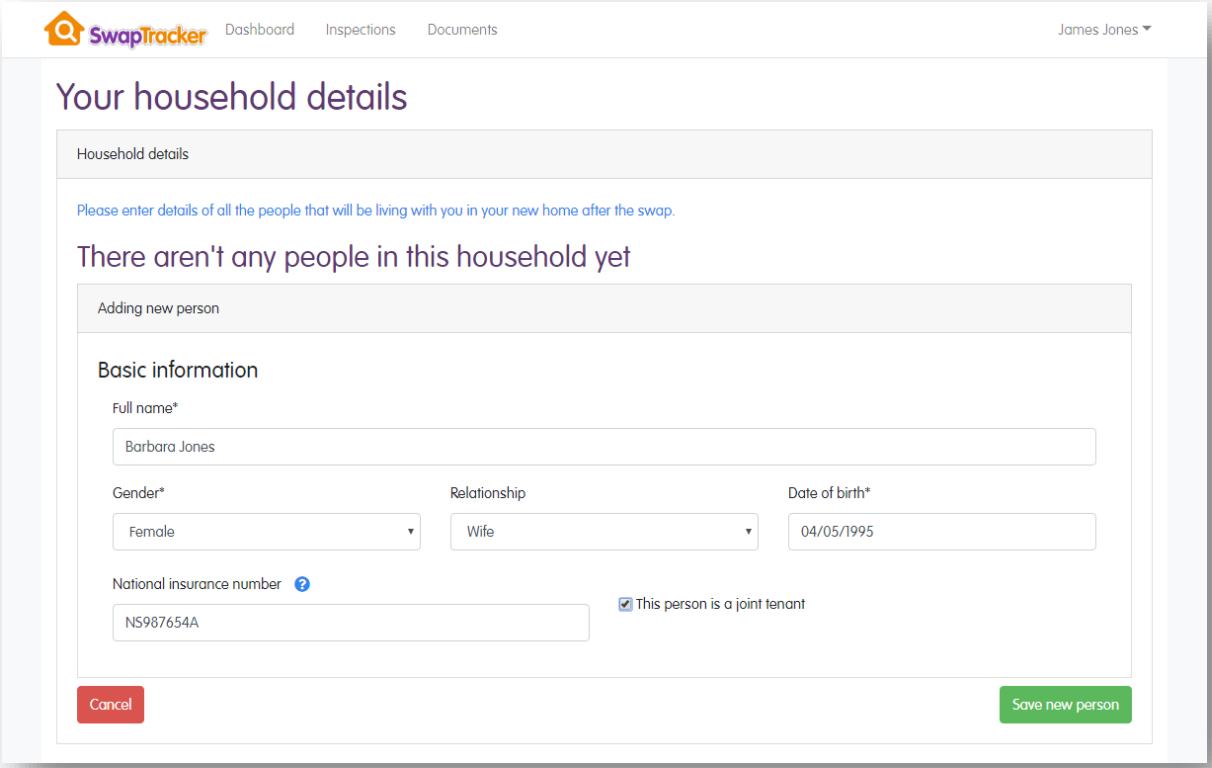
5. Your household details

The tenant must provide a list of everyone who will be living with them when they move.



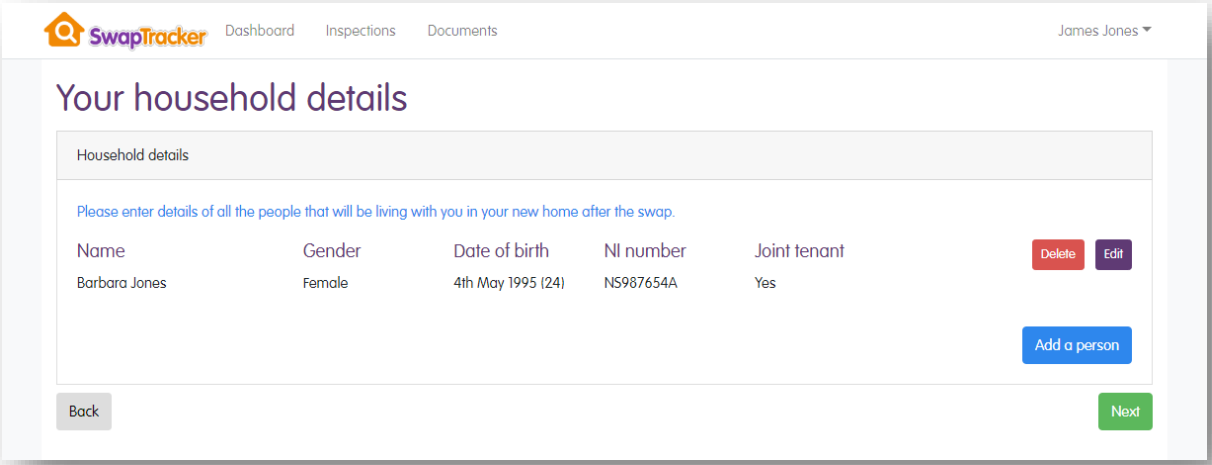
Clicking "*Add a person*" will take them to a form where they can add details of a household member.

This includes identifying if they are the joint tenant.



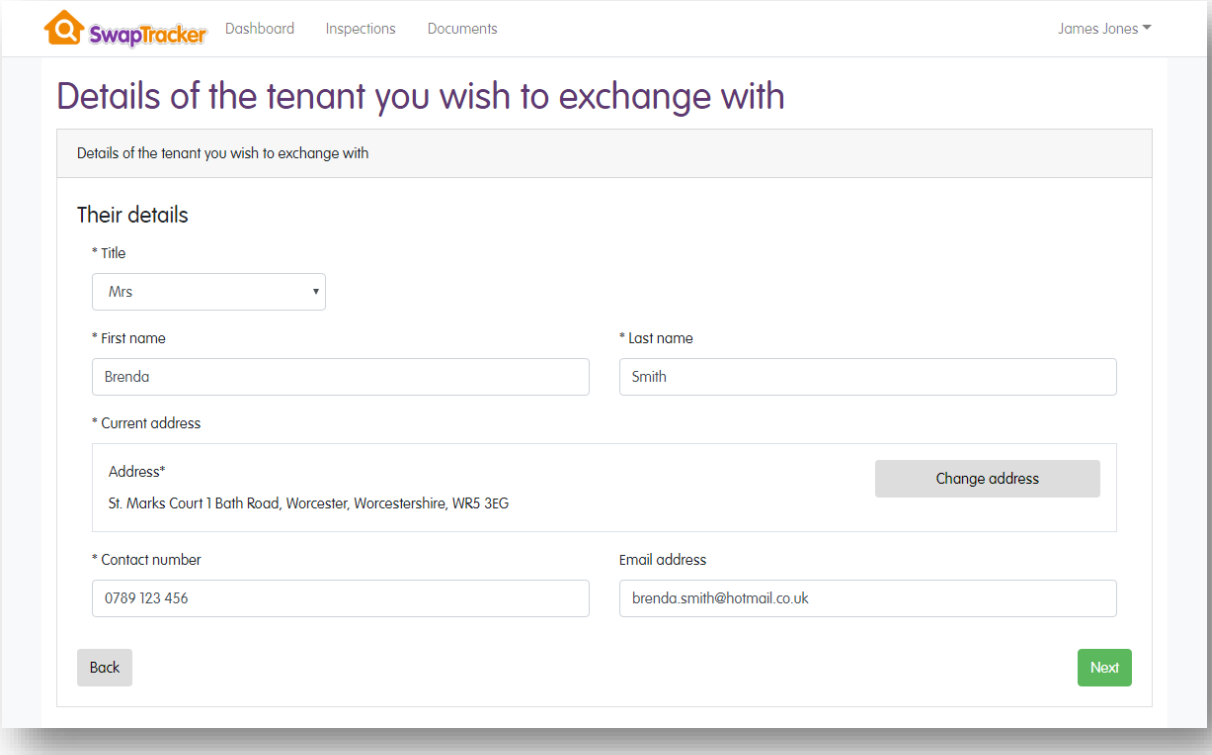
Clicking "*Save new person*" saves the household member's details and a list of all saved people is shown.

From here, the tenant can edit or delete an existing household member or add additional people.



6. Details of the tenant you wish to exchange with

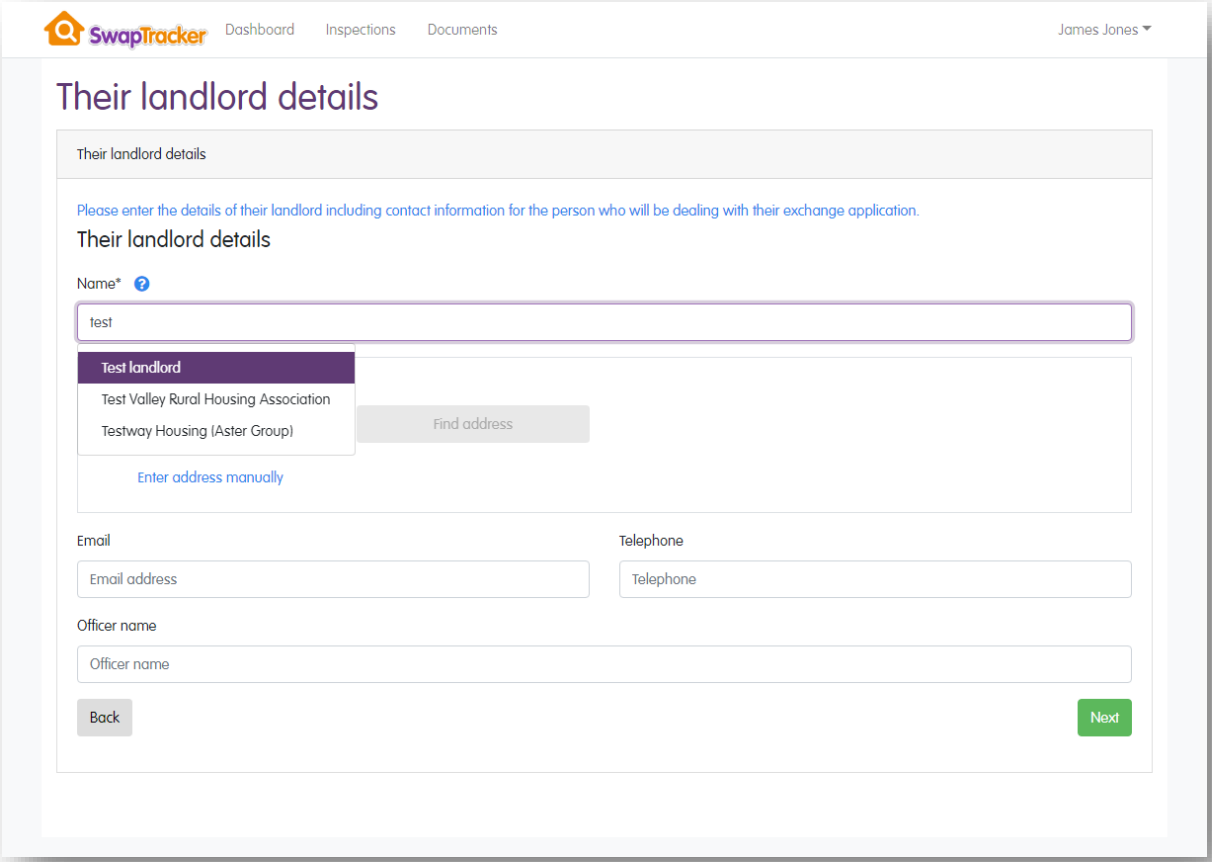
The second half of the form relates to the person the tenant wants to swap with.



Details of a joint tenant can also be entered on this page (if applicable).

7. Their landlord details

The tenant selects the landlord of the person they want to swap with.



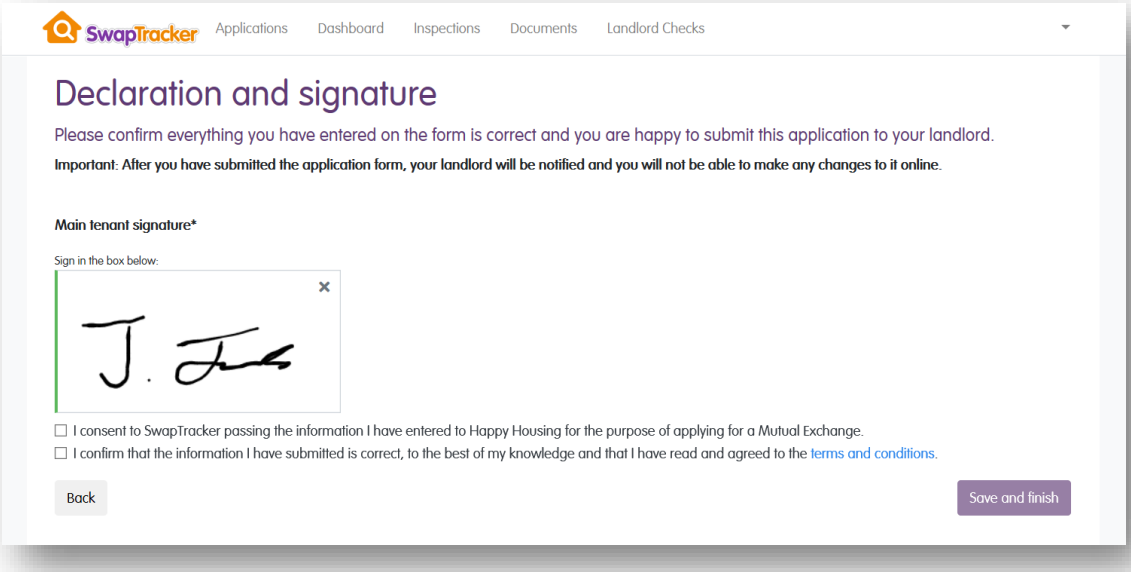
If we have MX contact details for this organisation, the address, email and telephone are pre-populated from our database.

8. Declaration and signature

On the final page of the form the tenant must:

- Sign the signature box
- Tick the box to consent to passing their information to your organisation
- Tick the box to agree to the *terms and conditions* and *privacy policy* (if applicable)

The application form cannot be submitted if they have not done all the above.



If there is a joint tenant, that person will also be required to tick the confirmation boxes and provide a signature.

When they click "*Save and finish*" the application is set to "New" and the form is locked, i.e. they are unable to amend anything they have submitted unless you allow them to do so later (see Problem with an Applicant's Form?)

If you are completing the form on behalf of a tenant, you do not need to sign the declaration page.

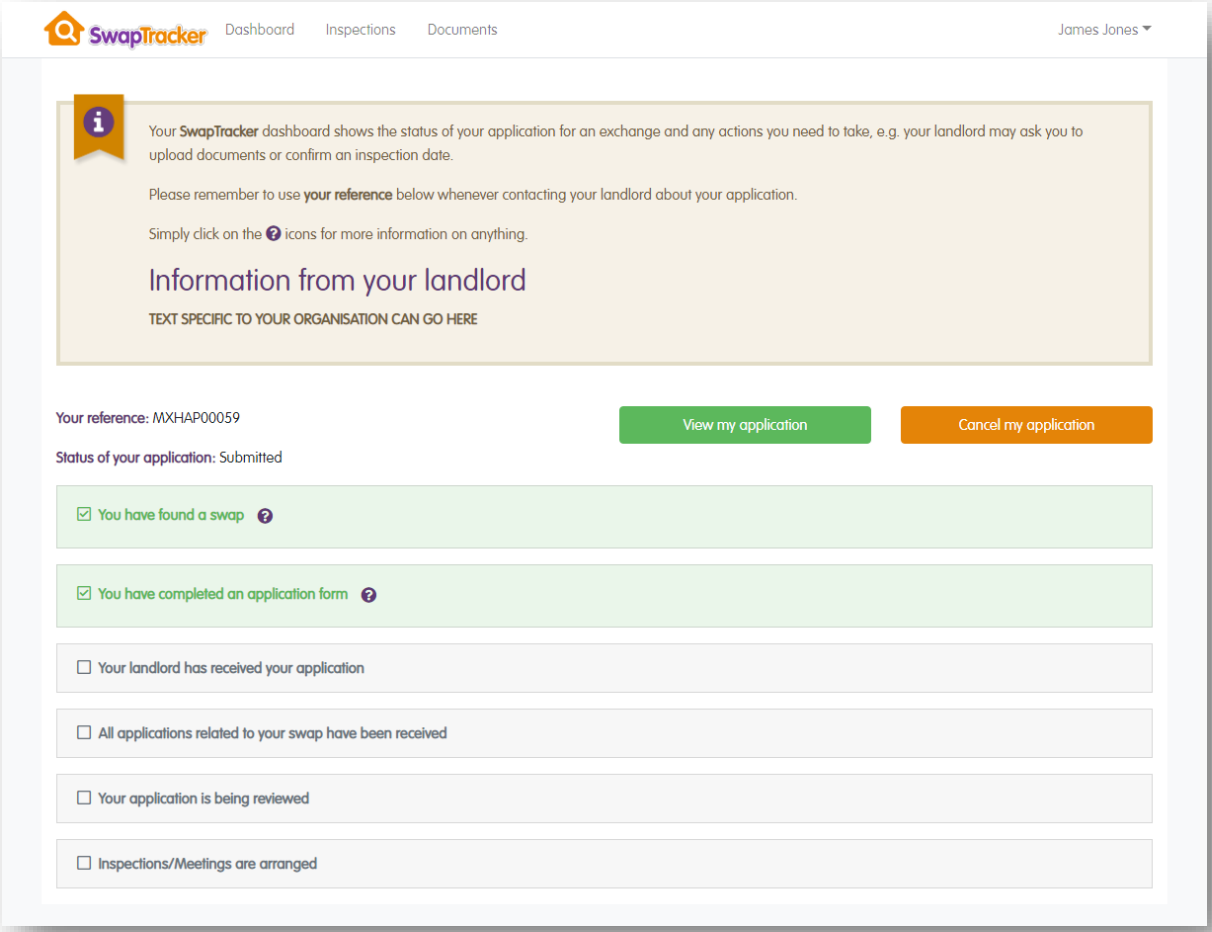
The "*terms and conditions*" and "*privacy policy*" the tenant must agree to can be your own documents.

If you want to use your own, please contact Housing Partners and we can configure these for you.

The tenant's SwapTracker dashboard

On submitting the form, the tenant is taken to their SwapTracker dashboard.

From here they can see the progress of their application and any actions they need to take, e.g. documents to upload or appointments to confirm.



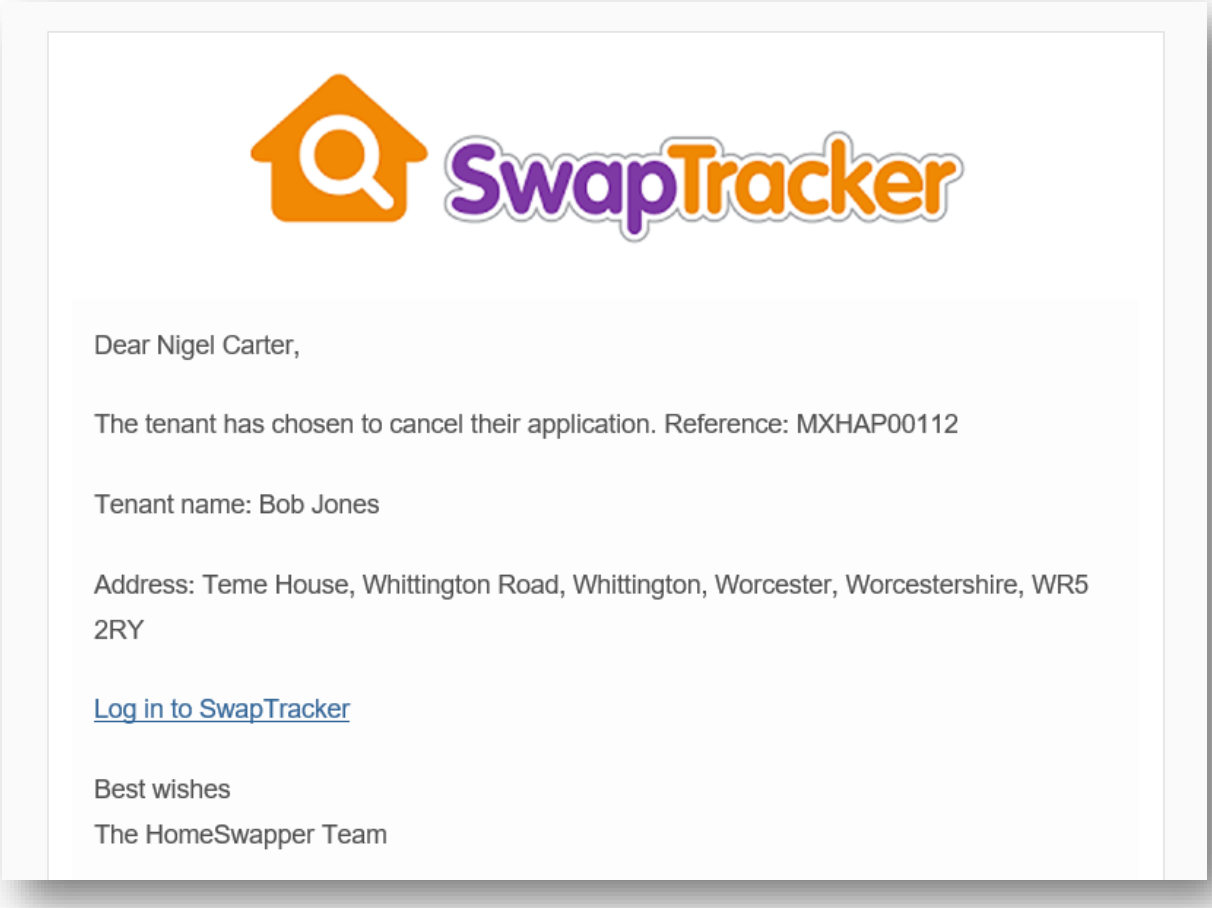
The "*Information from your landlord*" section can be used by you to communicate anything your organisation feels is important for tenants to be made aware of.

If you would like to provide some text for this, please contact Housing Partners and we can configure these for you. Otherwise nothing will be shown here.

Applications cancelled by the tenant

Tenants can cancel an application from their SwapTracker dashboard.

If this happens you will receive an email like the one below:



Dear Nigel Carter,

The tenant has chosen to cancel their application. Reference: MXHAP00112

Tenant name: Bob Jones

Address: Teme House, Whittington Road, Whittington, Worcester, Worcestershire, WR5 2RY

Log in to SwapTracker

Best wishes
The HomeSwapper Team

Important: you cannot access a tenant's application in SwapTracker if they choose to cancel it.

However, some information regarding the application is still viewable in the SwapTracker applications report that can be downloaded in the "Reports" section.

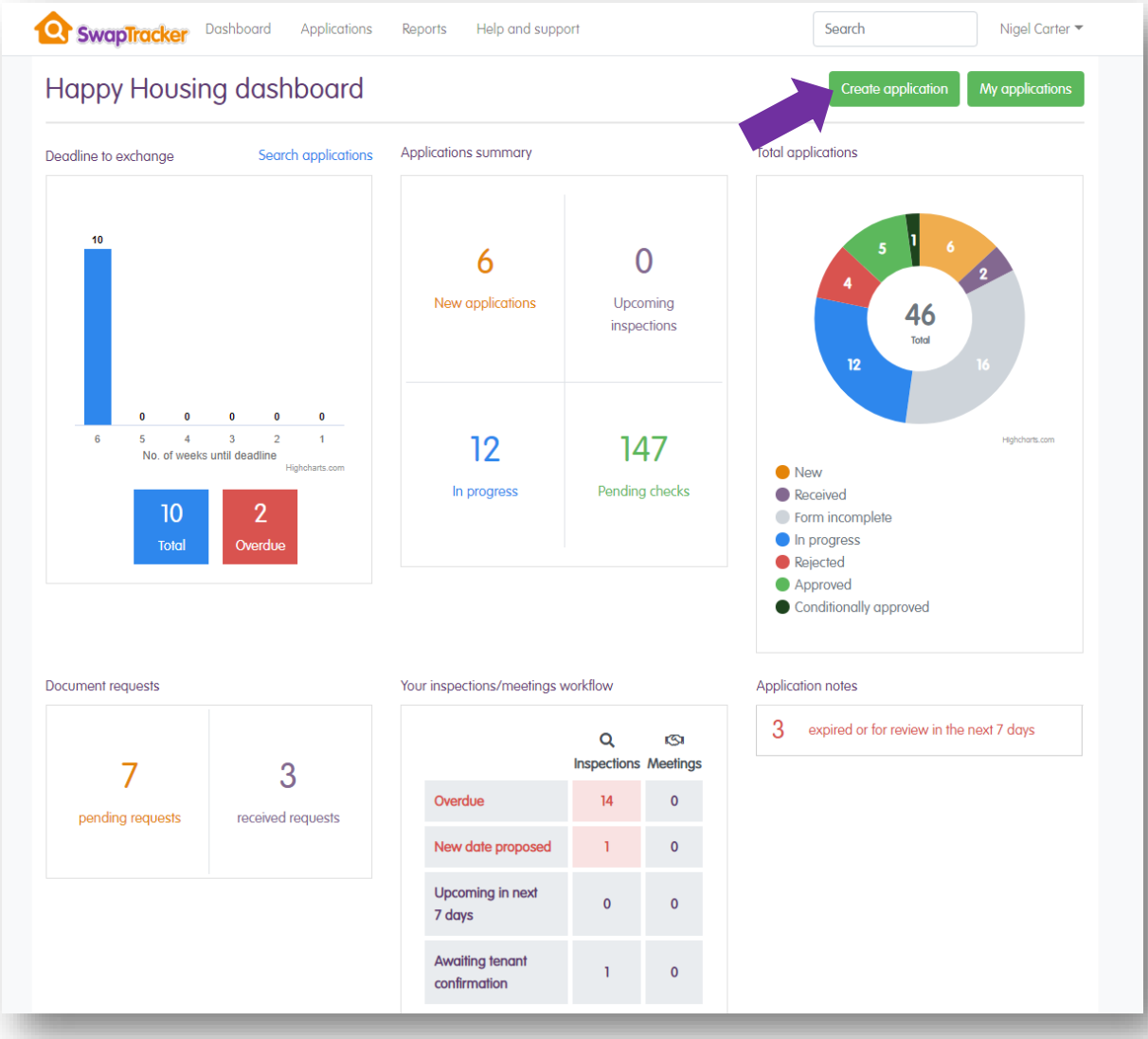
HOW TENANTS APPLY (NOT USING HOMESWAPPER)

Anyone can apply to you for an exchange using SwapTracker, even if:

- They are not on HomeSwapper
- They are not currently your tenant
- Their landlord does not use SwapTracker

You can do this by sending an application "**invite**" to them.

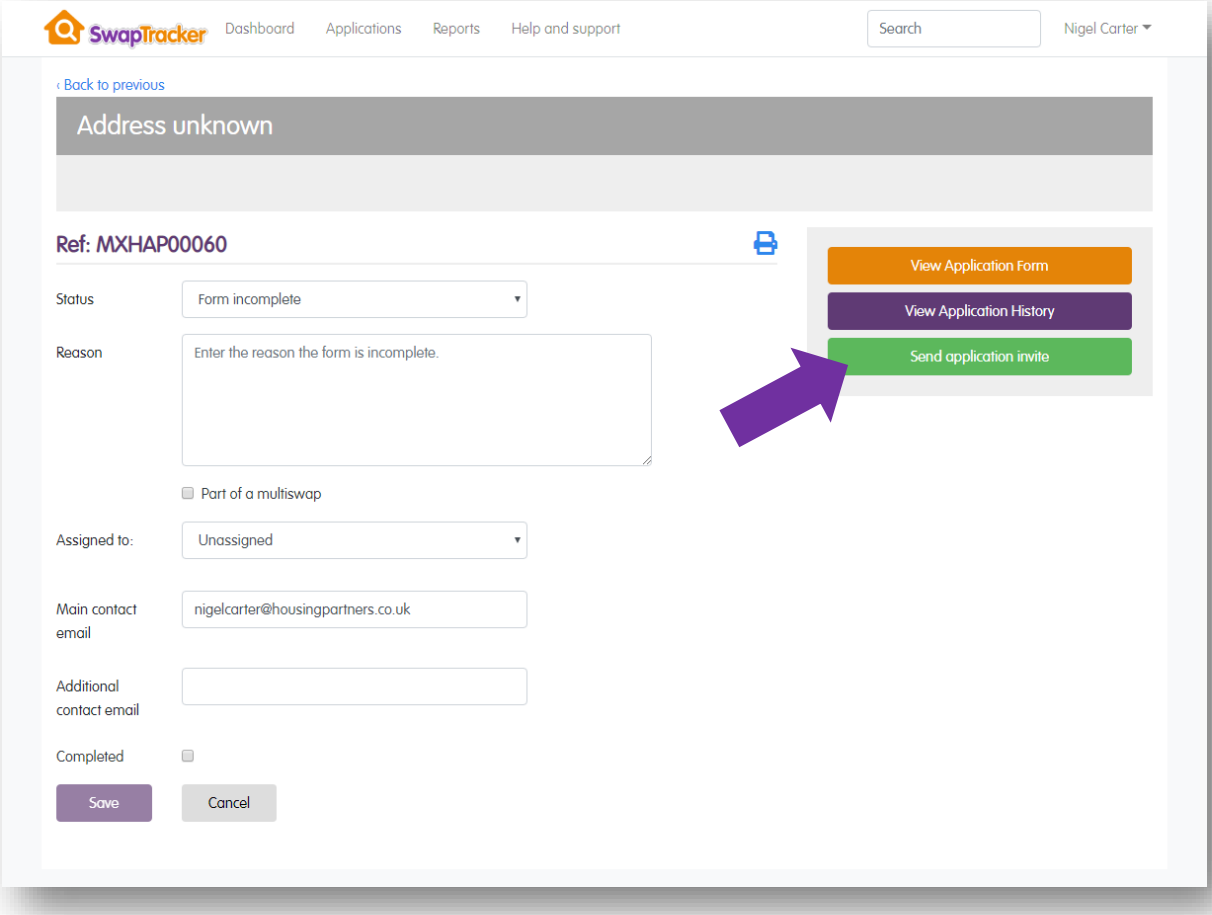
First click on the "*Create application*" button on your SwapTracker dashboard:



This creates a base application with a status of "Form incomplete".

It has a reference number allocated, but at this point has no tenant details.

To send the invite, click on "*Send application invite*":



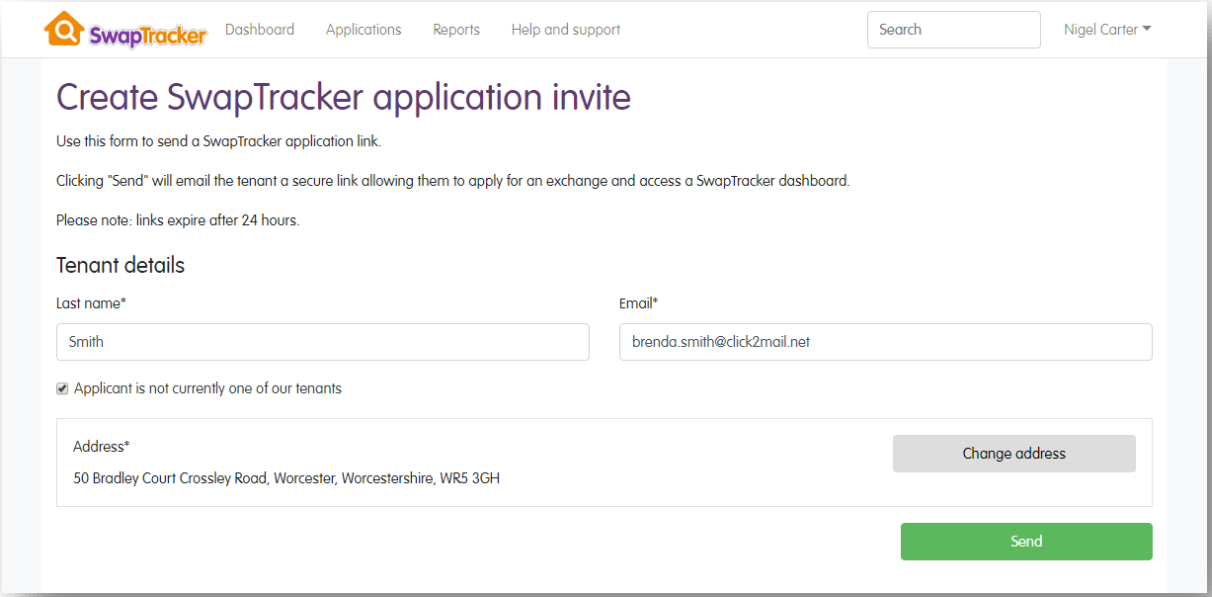
You now need to enter some basic details of the tenant you want to send an invite to:

- Last name
- Email address
- Their current address

All these fields are mandatory.

The tenant's last name and their postcode are required because they will need to enter these later to confirm the invite has been sent to the correct person.

The email address is required because the invite must be sent as an email.



There is also an "*Applicant is not currently one of our tenants*" tick box.

If you are sending this to a person who is <u>not</u> one of your tenants at present, tick this box.

SwapTracker needs this information because the application forms the tenant will be asked to complete can different depending on whether they are a current tenant of yours or not.

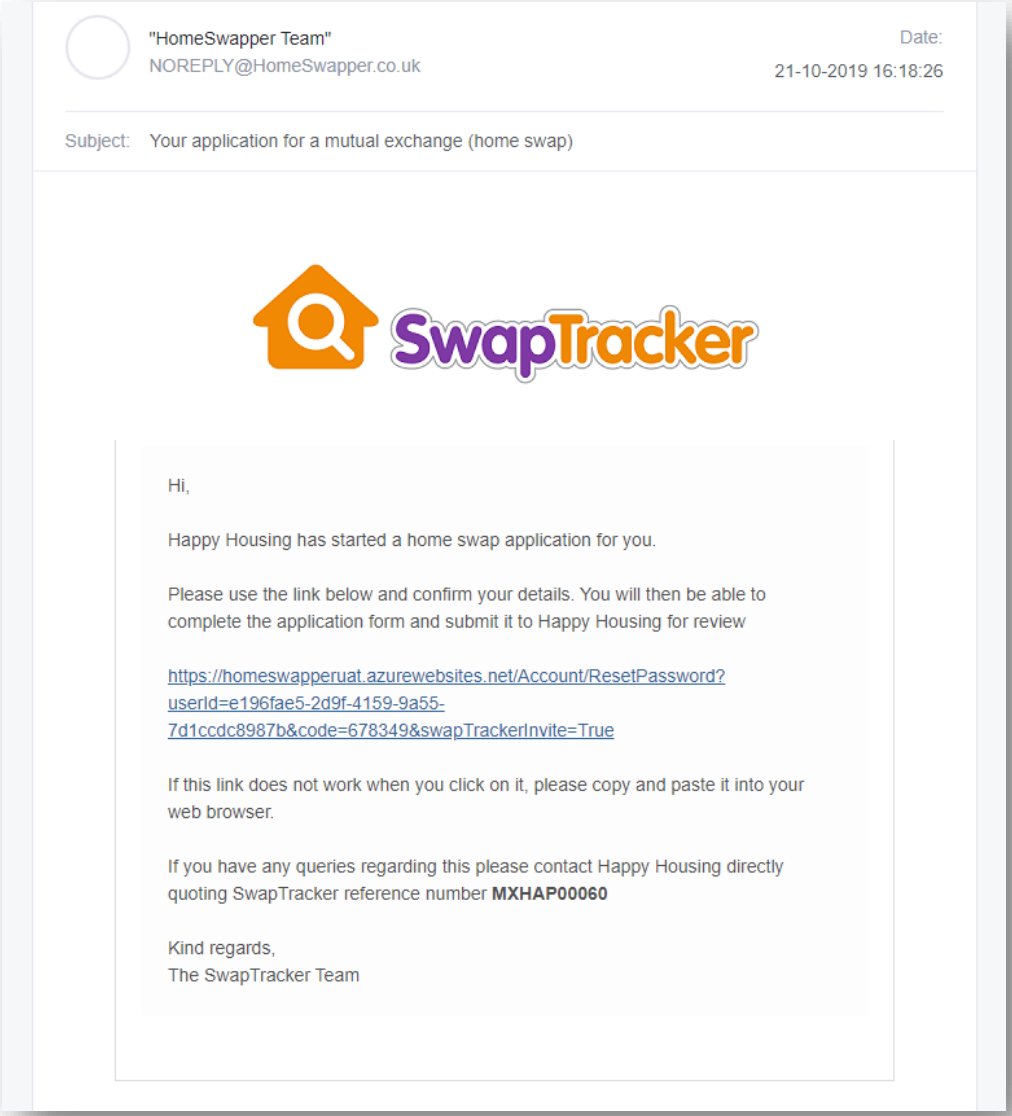
Clicking "Send" will send the invite to the tenant (you will be asked to confirm this first).

If you have made a mistake or need to re-send the invite, simply click on the "*Amend application invite*" or "*Re-send application invite*" buttons on the Application Summary page.

Note: "invites" work differently depending on if that person already has a HomeSwapper account or not. The differences are explained below.

Invites for someone who does not have a HomeSwapper account

The tenant is sent an email invite which includes their SwapTracker reference number and a secure link for them to start their application.



"HomeSwapper Team"
NOREPLY@HomeSwapper.co.uk

Date:
21-10-2019 16:18:26

Subject: Your application for a mutual exchange (home swap)

SwapTracker

Hi,

Happy Housing has started a home swap application for you.

Please use the link below and confirm your details. You will then be able to complete the application form and submit it to Happy Housing for review

https://homeswapperuat.azurewebsites.net/Account/ResetPassword?userId=e196fae5-2d9f-4159-9a55-7d1ccdc8987b&code=678349&swapTrackerInvite=True

If this link does not work when you click on it, please copy and paste it into your web browser.

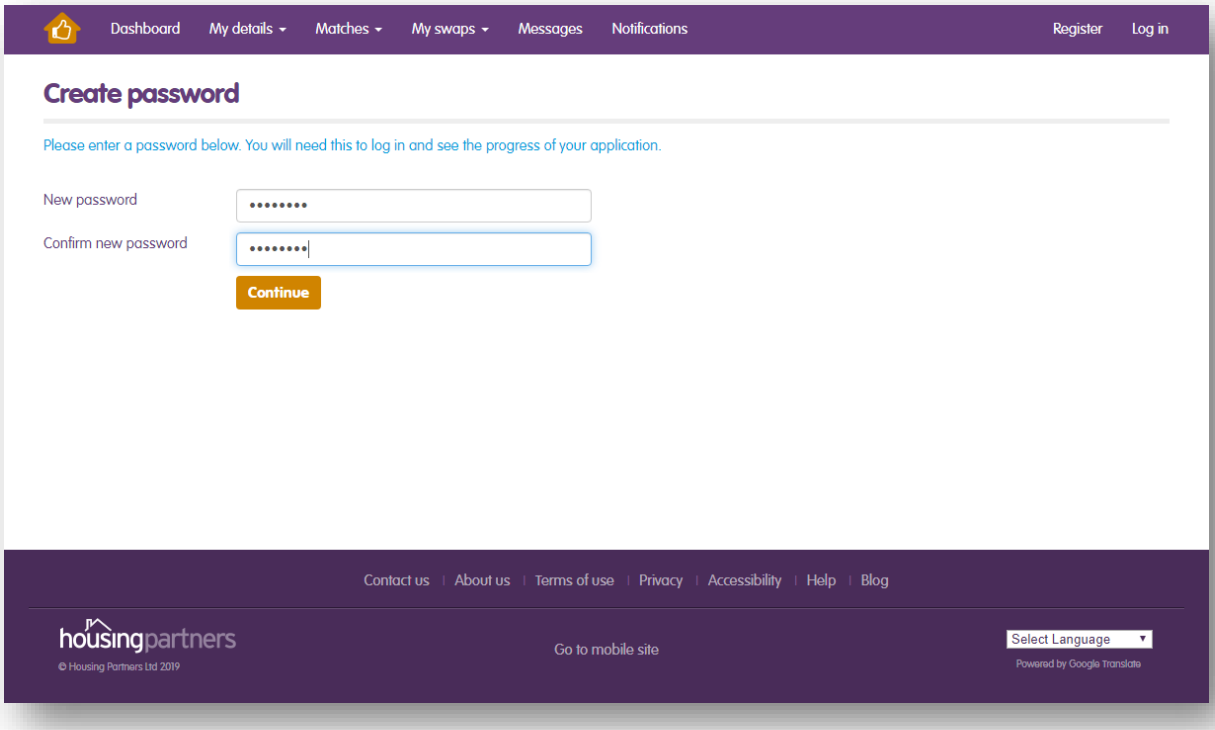
If you have any queries regarding this please contact Happy Housing directly quoting SwapTracker reference number **MXHAP00060**

Kind regards,
The SwapTracker Team

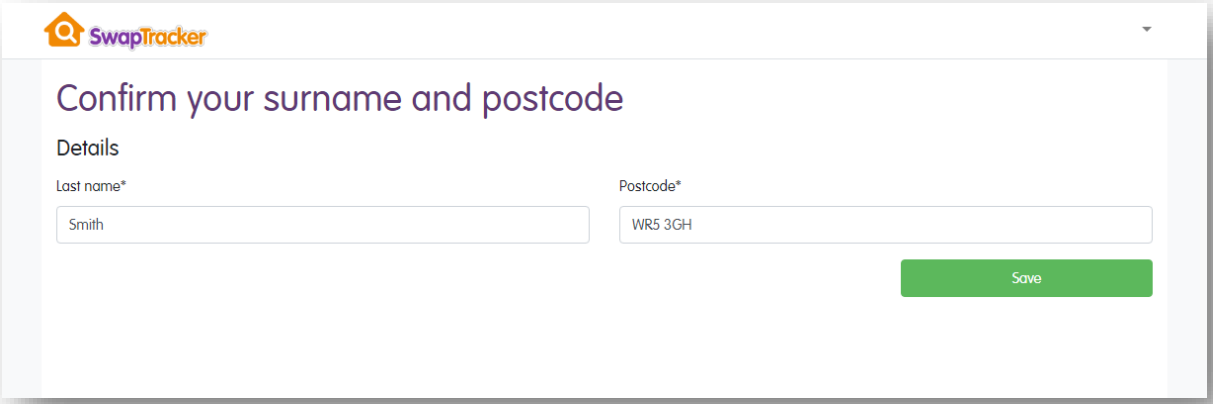
Note: for security reasons these links expire after 24 hours and will need to be re-sent.

When the tenant uses the link in the email, they are taken to a page to enter a password for their SwapTracker application.

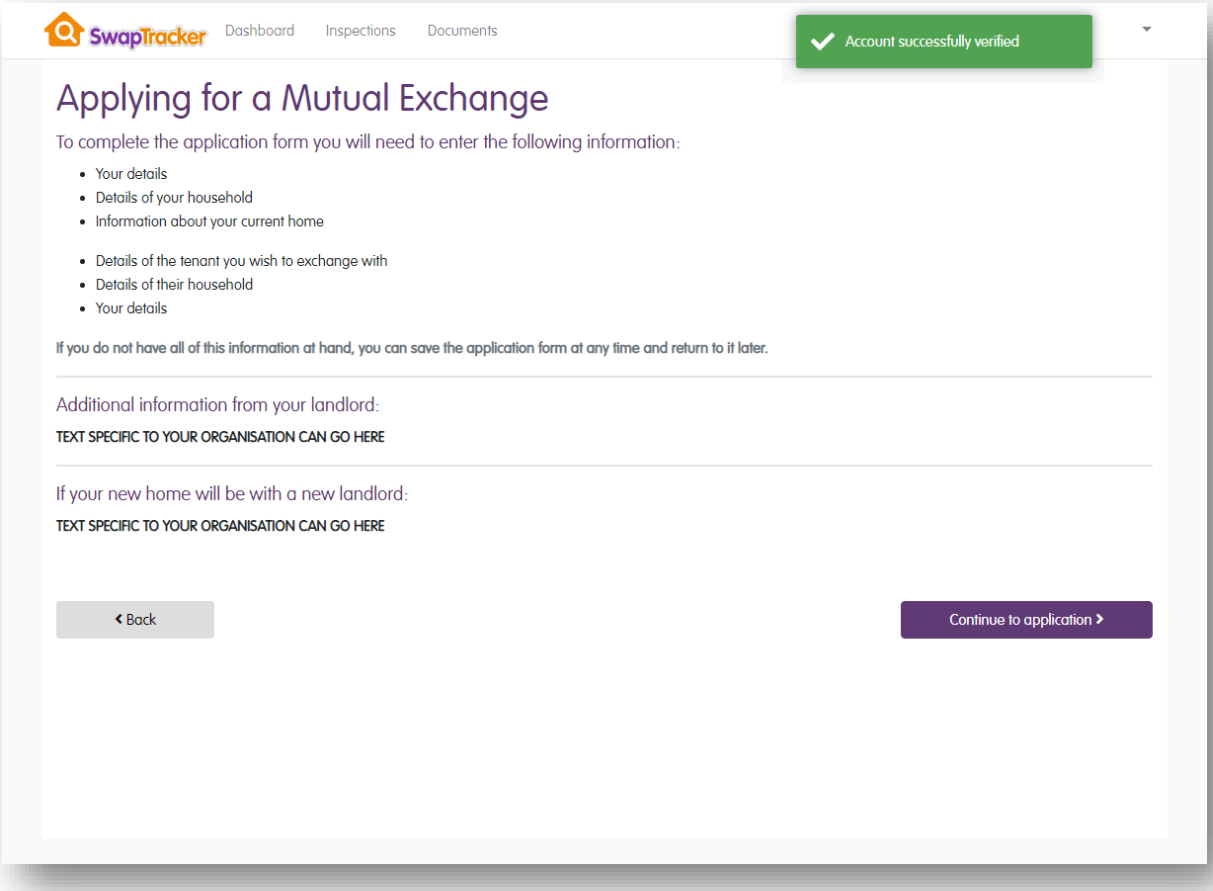
This is required so they can login later to continue their application or view their SwapTracker dashboard after applying.



Next, they must confirm their last name and postcode. This should match the details you entered when creating the application invite earlier.



If these details match, the account is successfully verified, and they can apply online in the same way they would do coming from HomeSwapper:

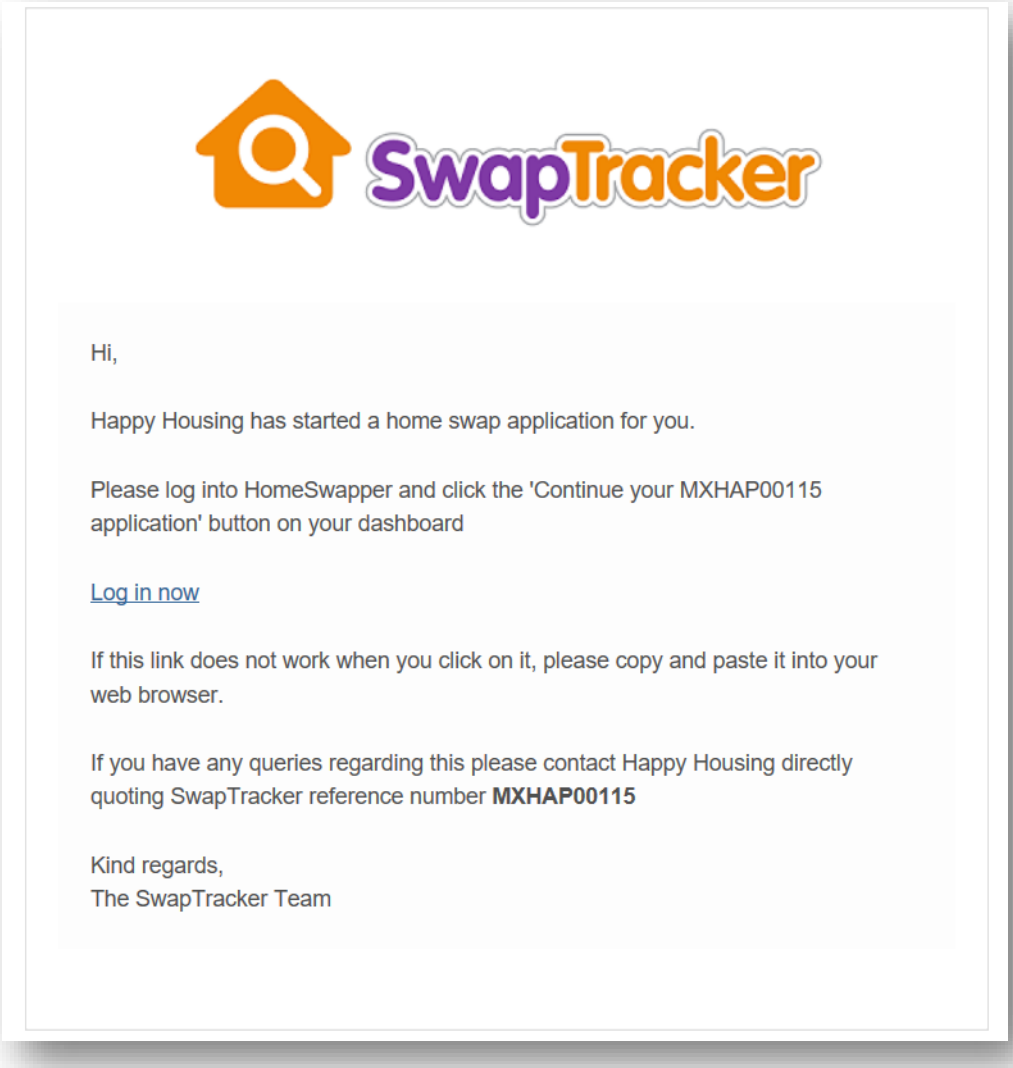


Invites for someone who already has a HomeSwapper account

If they already have a HomeSwapper account, they are sent a different email.

This tells them to log into their HomeSwapper account, where they can now apply for an exchange to your organisation.

They do not need to confirm their last name and postcode.



SwapTracker

Hi,

Happy Housing has started a home swap application for you.

Please log into HomeSwapper and click the 'Continue your MXHAP00115 application' button on your dashboard

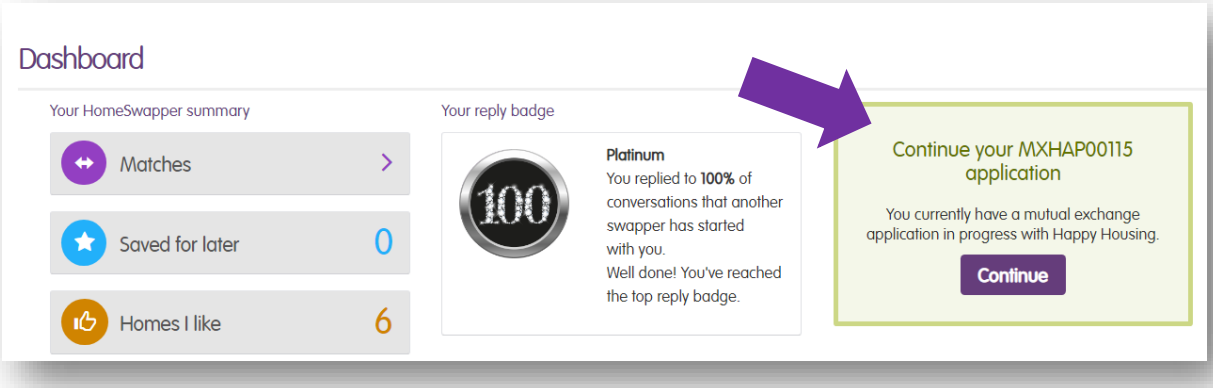
Log in now

If this link does not work when you click on it, please copy and paste it into your web browser.

If you have any queries regarding this please contact Happy Housing directly quoting SwapTracker reference number **MXHAP00115**

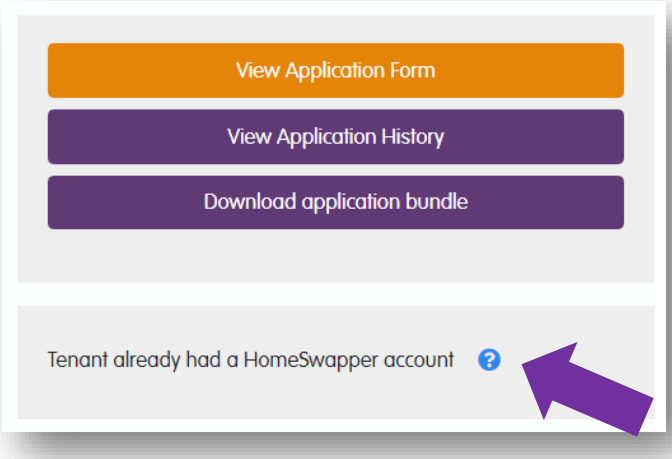
Kind regards,
The SwapTracker Team

When they log into HomeSwapper, they will see a panel on their dashboard inviting them to continue with their application.



Clicking this takes them to the SwapTracker application form so they can apply to you online.

In SwapTracker, their "Application Summary" page will also show you they had a HomeSwapper account.

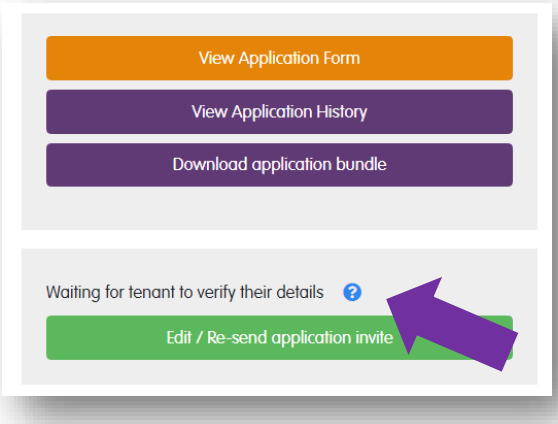


If they have any difficulties applying, simply tell to log into HomeSwapper and apply as above.

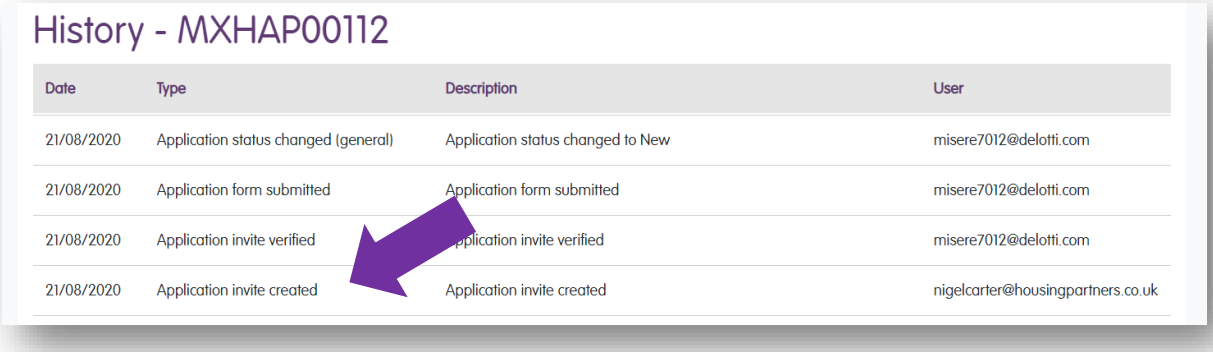
Keeping track of Application "invites"

After you've sent an "invite" to someone to apply via SwapTracker, you obviously want to be able to check their progress.

In the "Application Summary" page you can see that the invite has been sent and you are waiting for the tenant to verify their details. At this stage, you can edit the invite or re-send it if required:



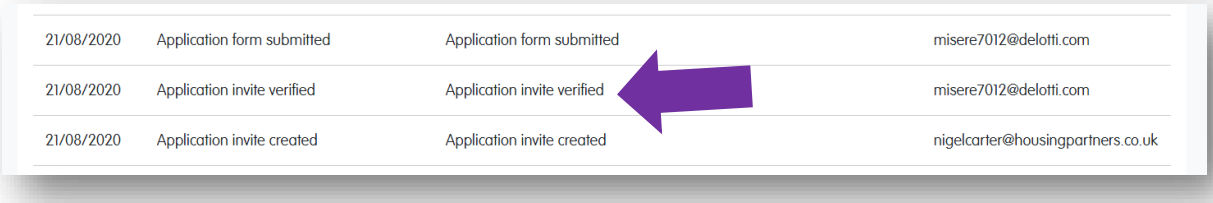
In their "Application History" section, you can also see when the invite was sent:



History - MXHAP00112

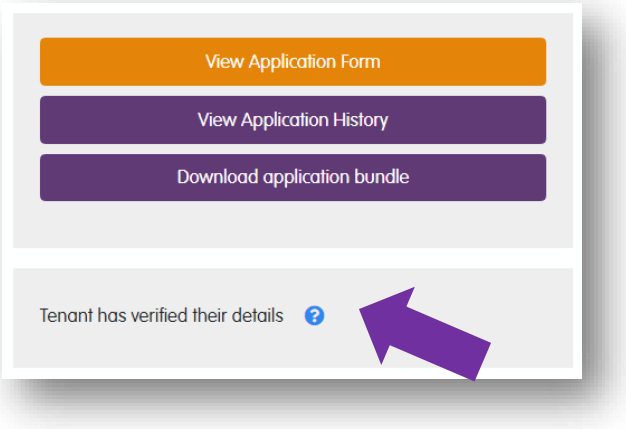
Date	Type	Description	User
21/08/2020	Application status changed (general)	Application status changed to New	misere7012@delotti.com
21/08/2020	Application form submitted	Application form submitted	misere7012@delotti.com
21/08/2020	Application invite verified	Application invite verified	misere7012@delotti.com
21/08/2020	Application invite created	Application invite created	nigelcarter@housingpartners.co.uk

When they do verify their details (i.e. they used the secure link and confirmed their name/postcode) this is also recorded in the "Application History":



21/08/2020	Application form submitted	Application form submitted	misere7012@delotti.com
21/08/2020	Application invite verified	Application invite verified	misere7012@delotti.com
21/08/2020	Application invite created	Application invite created	nigelcarter@housingpartners.co.uk

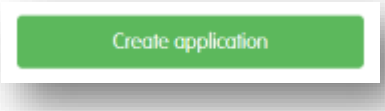
The "Application Summary" page now shows they have done this too:



If they have any difficulties applying now, simply tell to log into HomeSwapper using their email address and the password they entered when verifying their details.

Adding an Application on behalf of a Tenant

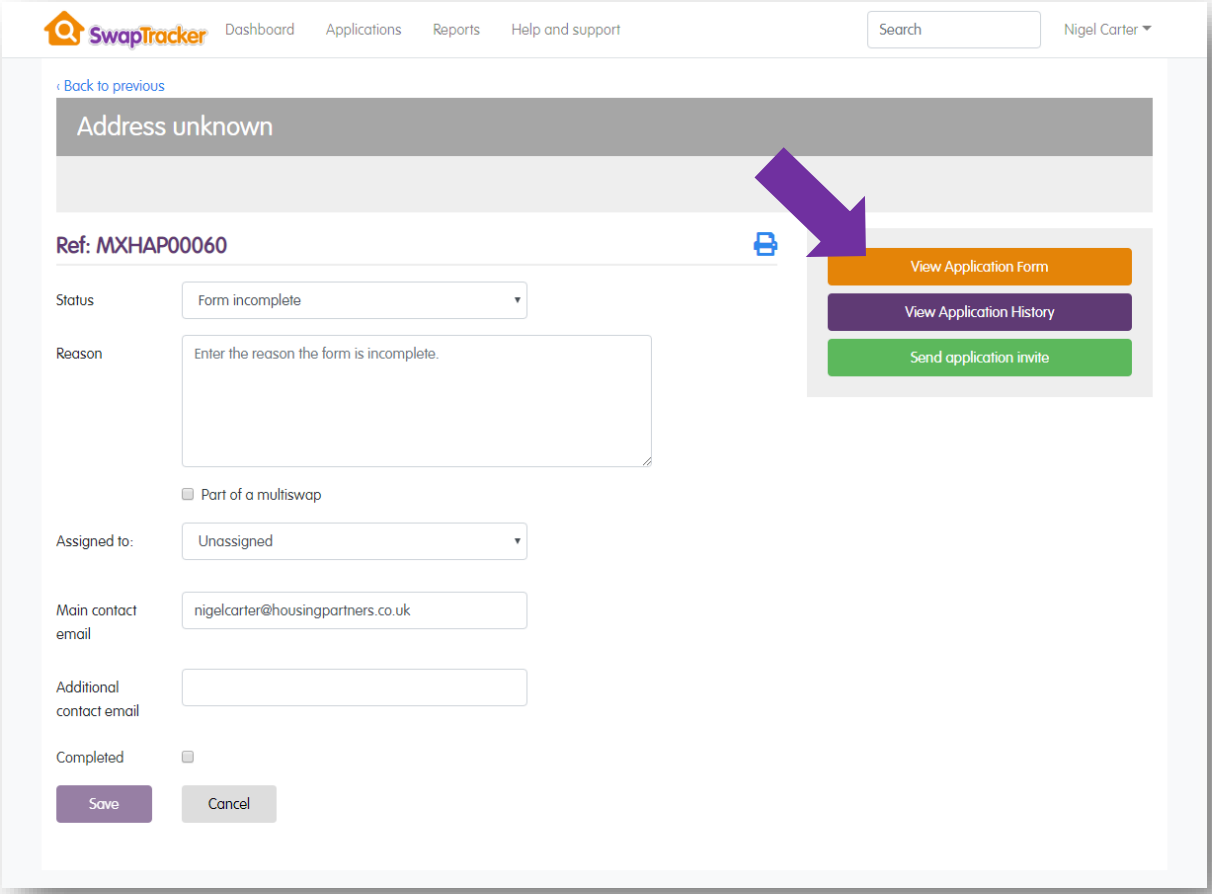
If you need to create a MX application on behalf of a tenant (for example they've already completed a paper form), use the "*Create application*" button at the top of your SwapTracker dashboard.



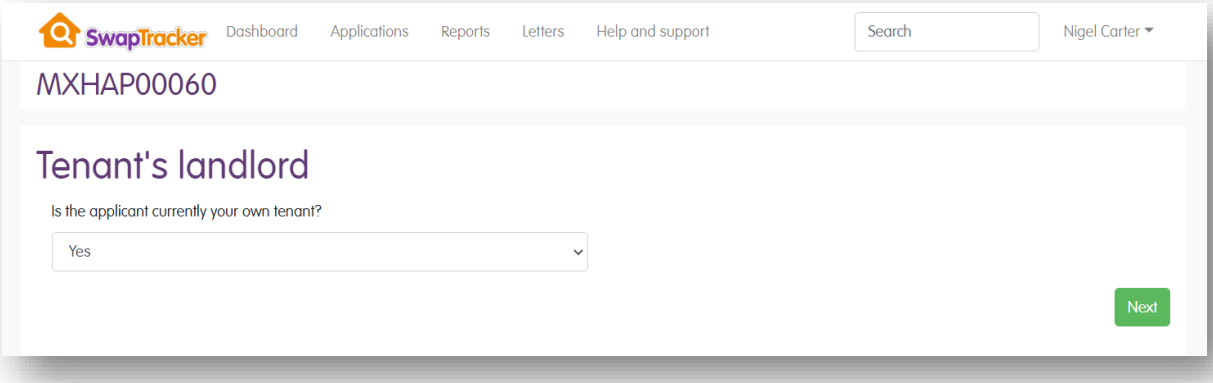
Clicking this creates a base application with a status of "Form incomplete".

It has a reference number allocated, but at this point it has no tenant details.

Clicking on the "*View Application form*" button will then take you to the application form which you can complete on their behalf.



Before entering the tenant's information, you are first prompted to specify if the person is currently your tenant or is an incoming tenant.

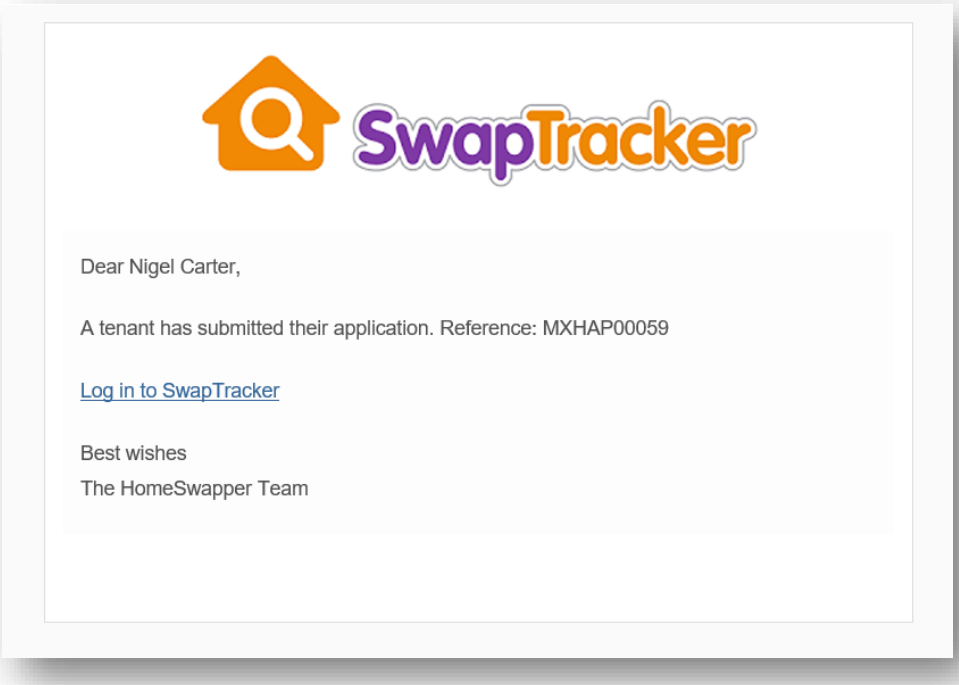


This is required because your application form may ask different questions for new and current tenants.

DEALING WITH "NEW" APPLICATIONS

When a tenant submits their application, the status is set to "New".

The main contact for your organisation will get an email notification as below:



SwapTracker

Dear Nigel Carter,

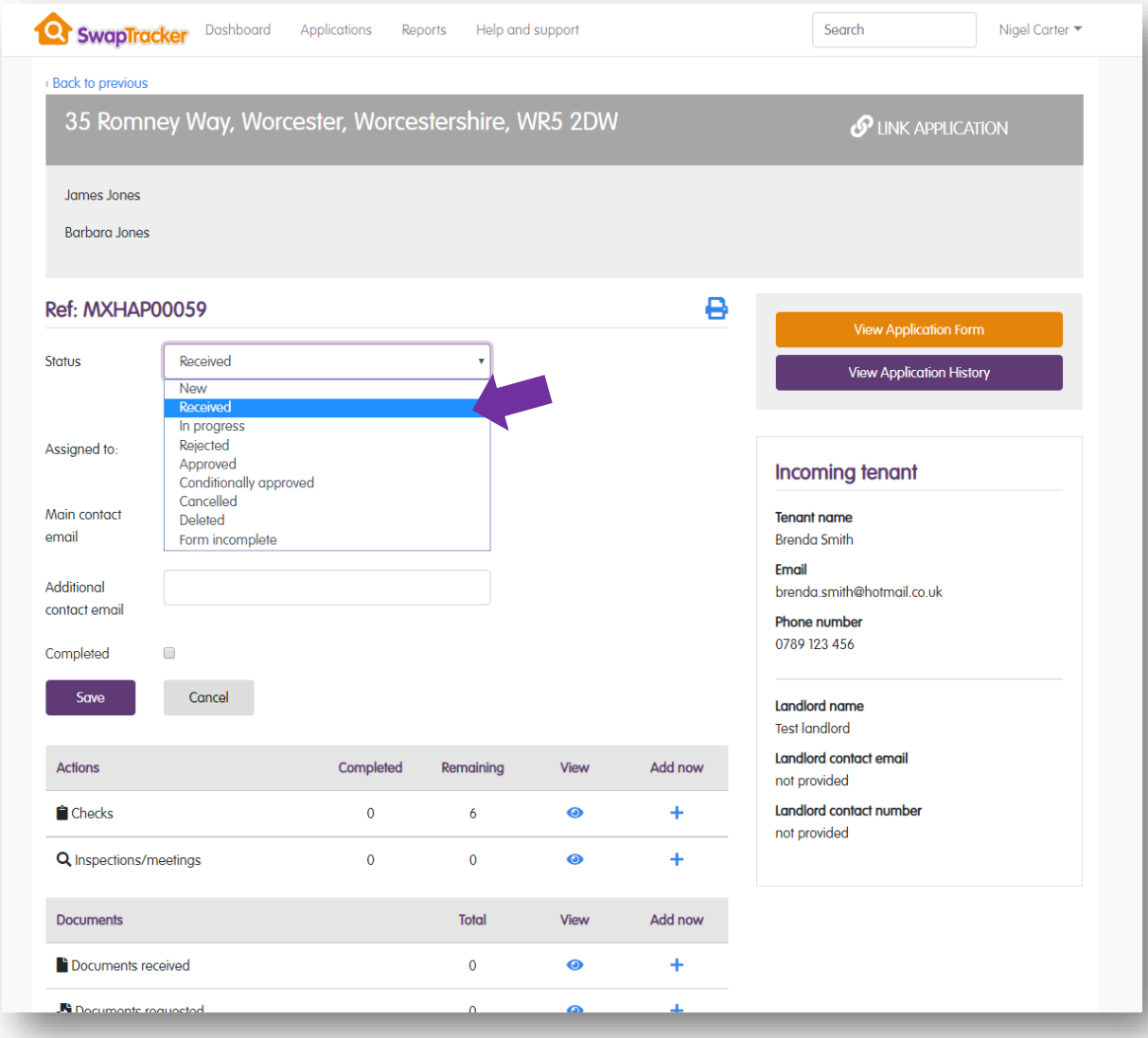
A tenant has submitted their application. Reference: MXHAP00059

Log in to SwapTracker

Best wishes
The HomeSwapper Team

Setting the application status to "Received" will notify the tenant that their application has been received but is not yet "In progress".

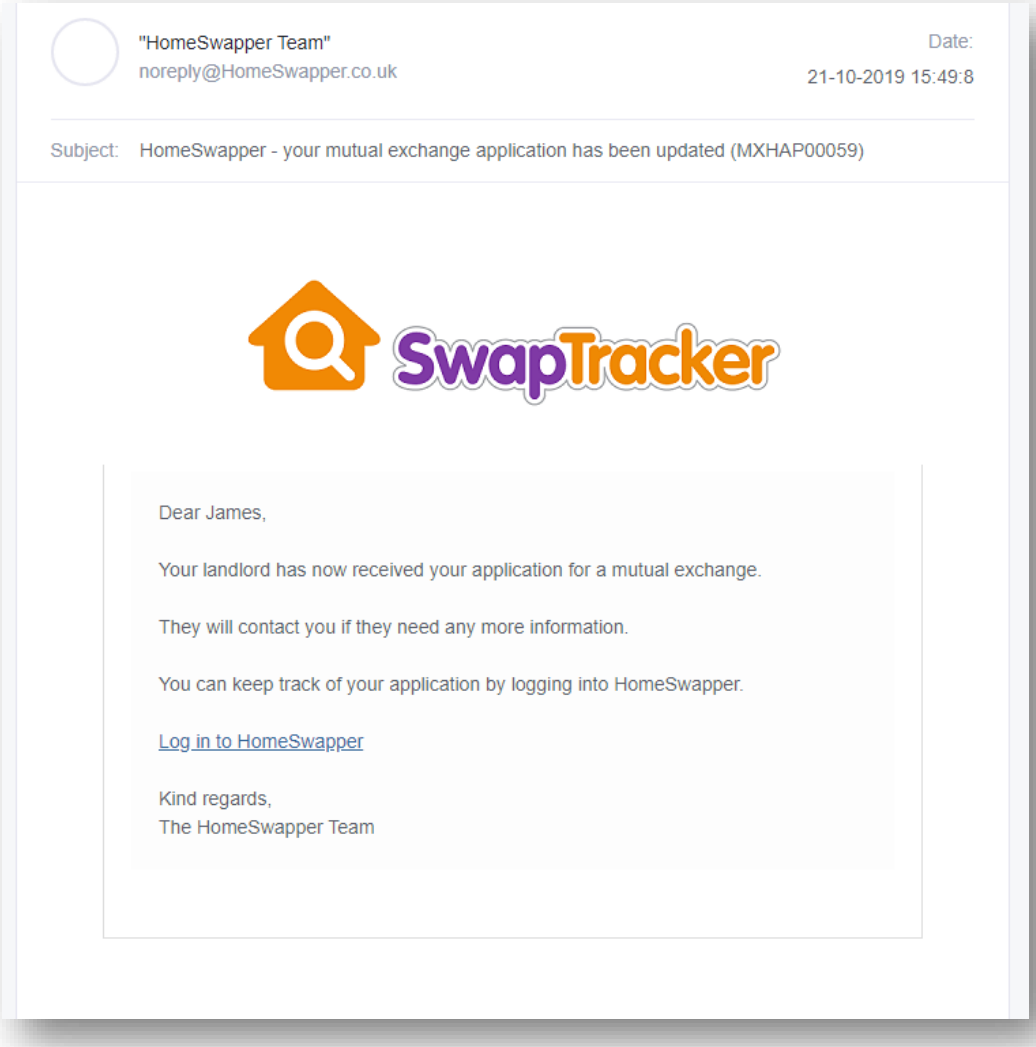
This is done by selecting the relevant status from the "Status" list on the Application Summary.



Note: You must click "*Save*" for this to take effect.

(Only after you set the application to "In Progress" will the 42 days be considered to have started).

The tenant will then get an email notifying them of the change to their application status:



"HomeSwapper Team"
noreply@HomeSwapper.co.uk

Date:
21-10-2019 15:49:8

Subject: HomeSwapper - your mutual exchange application has been updated (MXHAP00059)

Dear James,

Your landlord has now received your application for a mutual exchange.

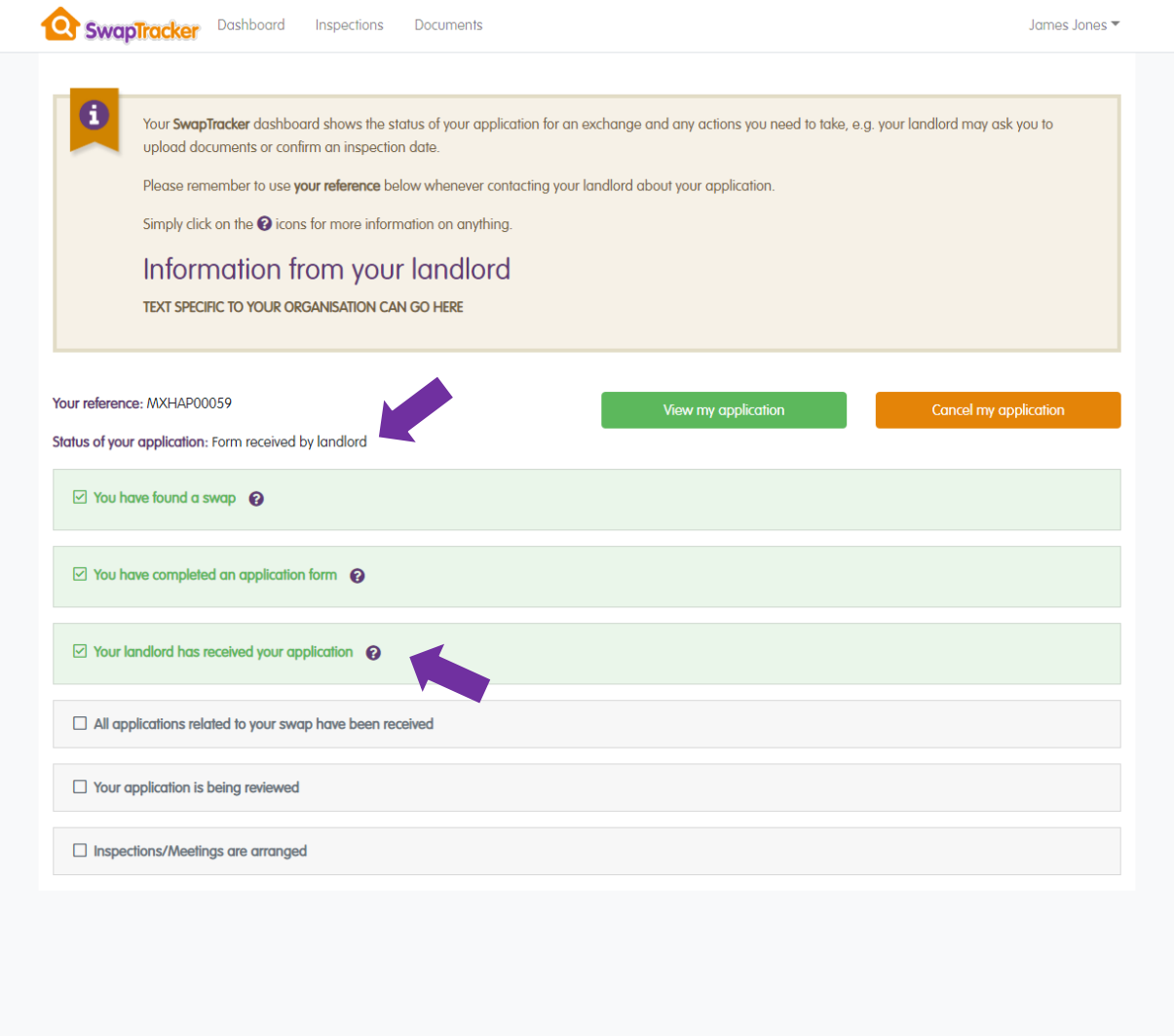
They will contact you if they need any more information.

You can keep track of your application by logging into HomeSwapper.

Log in to HomeSwapper

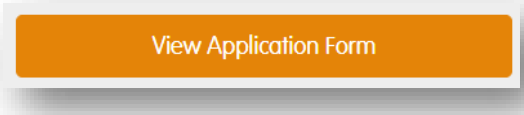
Kind regards,
The HomeSwapper Team

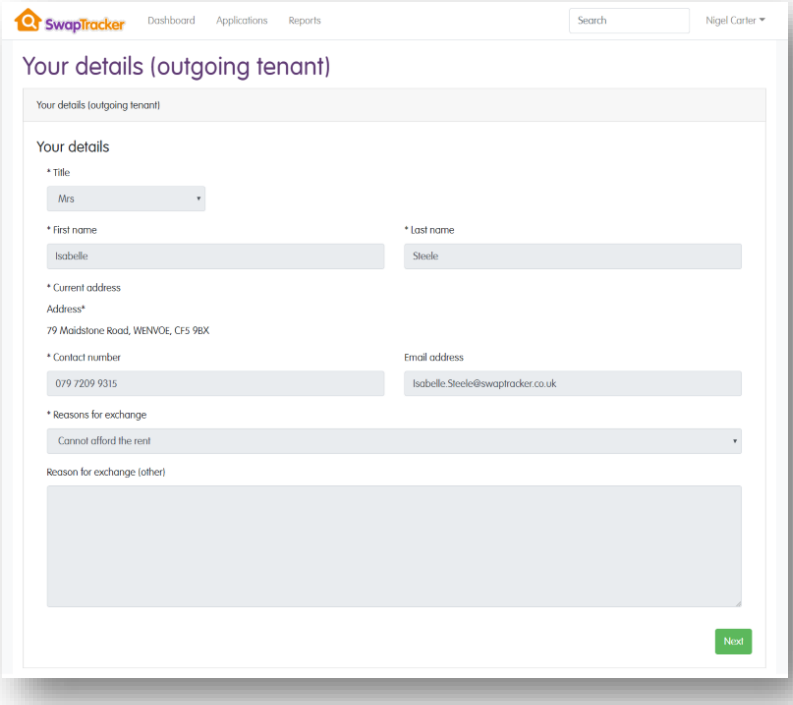
The tenant's SwapTracker dashboard now shows them that their landlord has received their application and the status is changed.



Reviewing the Application Form

On the Application Summary page, clicking the "*View Application Form*" button will take you to the application form that was submitted by the tenant.





You should now review the form and check you are happy with it, e.g. have they entered all the information you need?

If not, you will need to send it back to the tenant to complete properly (see Problem with an Applicant's Form?).

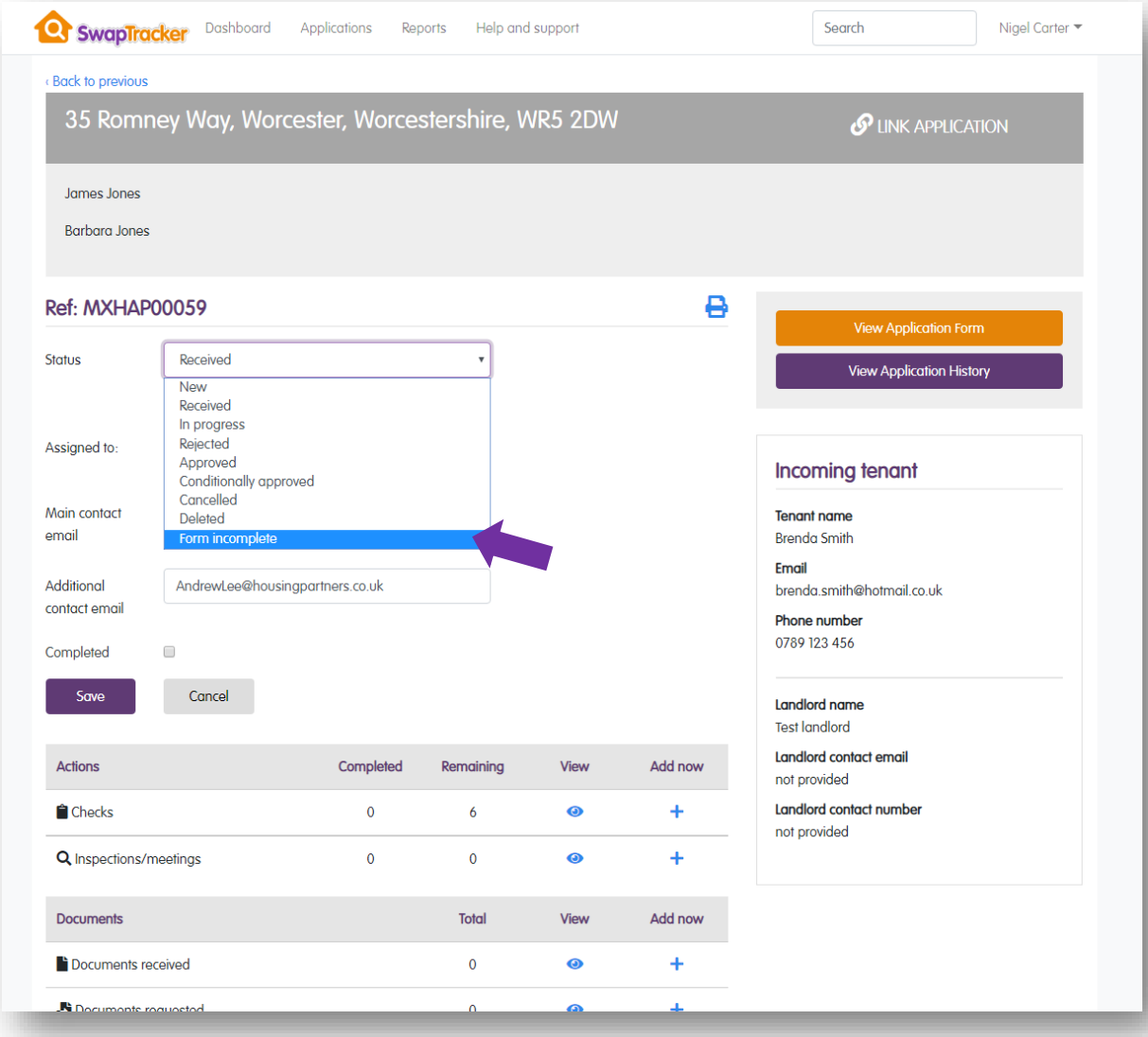
Printing forms

You can print an entire application form by clicking on the printer icon on the Application Summary page. This is also a handy way of seeing the whole form without having to click "Next" on each page.

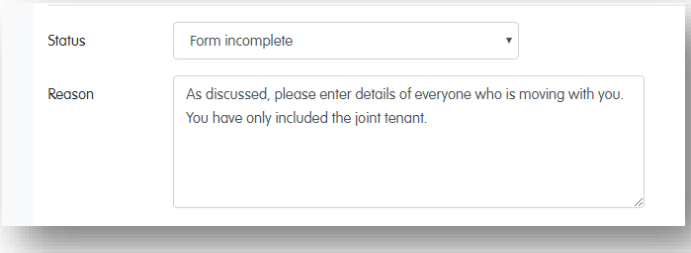
Problem with an Applicant's Form?

If there is a problem with the form the tenant has submitted, you may need to send it back to them to complete properly.

First, set the status of the Application to "Form incomplete":

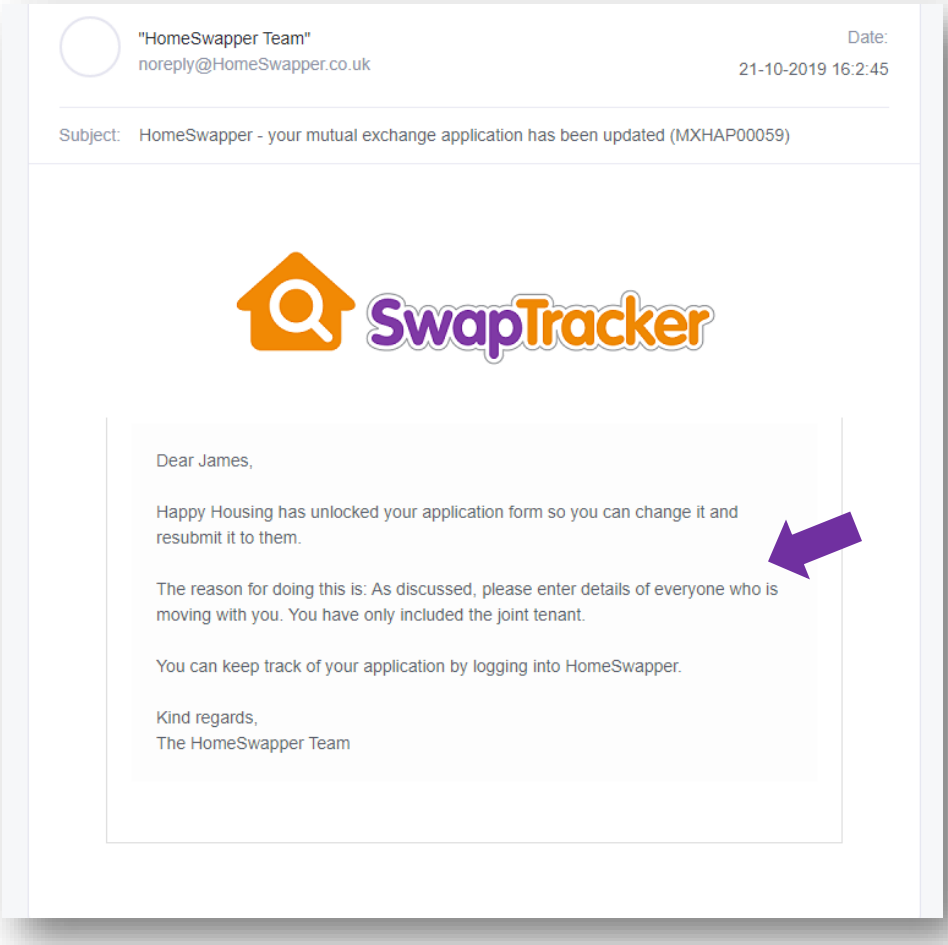


You will then be prompted to enter a reason for why they need to amend and re-submit their form:



After you click "Save", the tenant will be sent an email notifying them they need to amend the form and re-submit it.

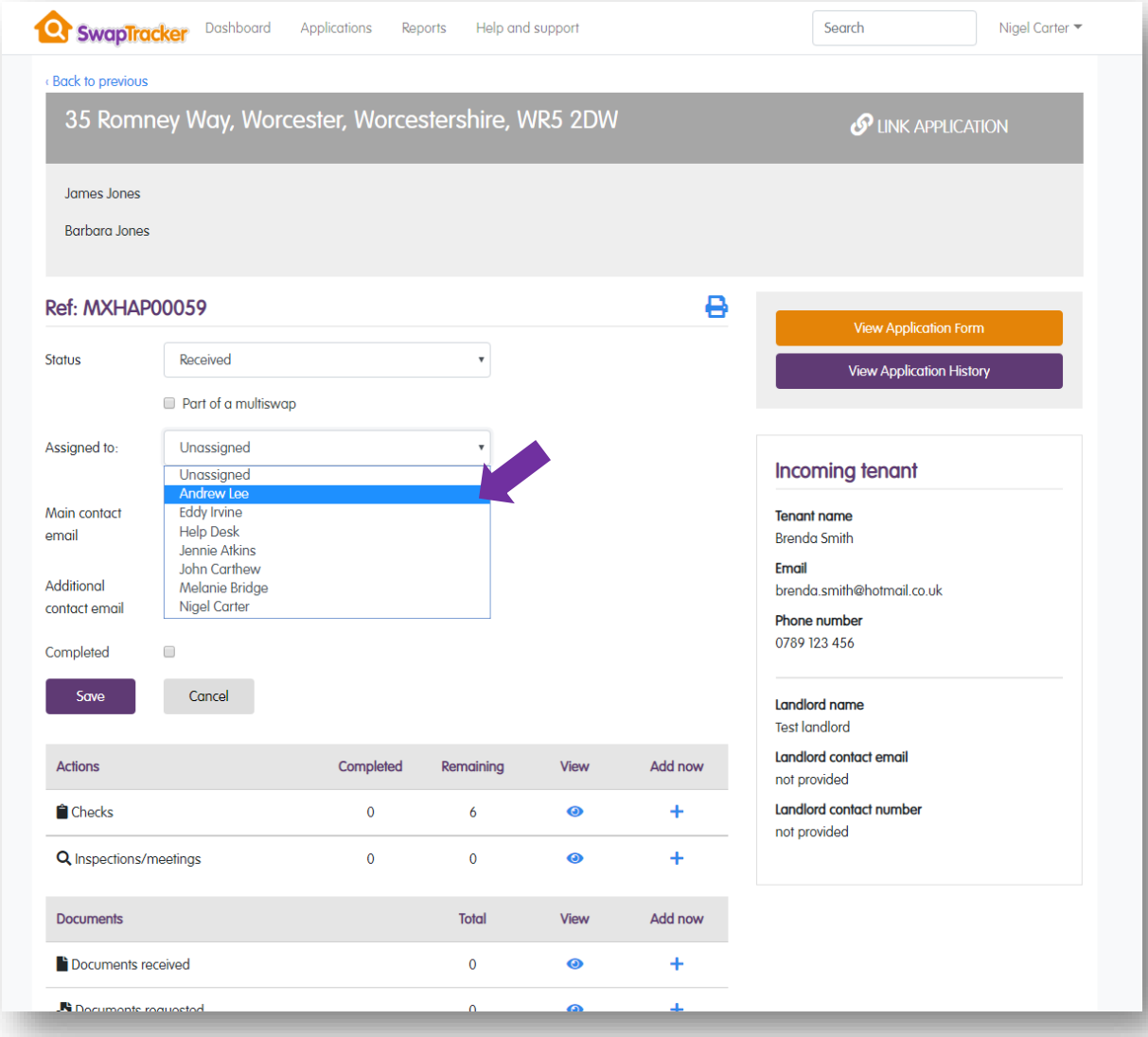
This also includes the reason why:



When they log into SwapTracker their application form will have been unlocked. They can now make the changes they've been asked to and re-submit the form to you.

ASSIGNING APPLICATIONS

Applications can be assigned to specific users within your organisation by selecting the relevant person from the list on the Application Summary page.

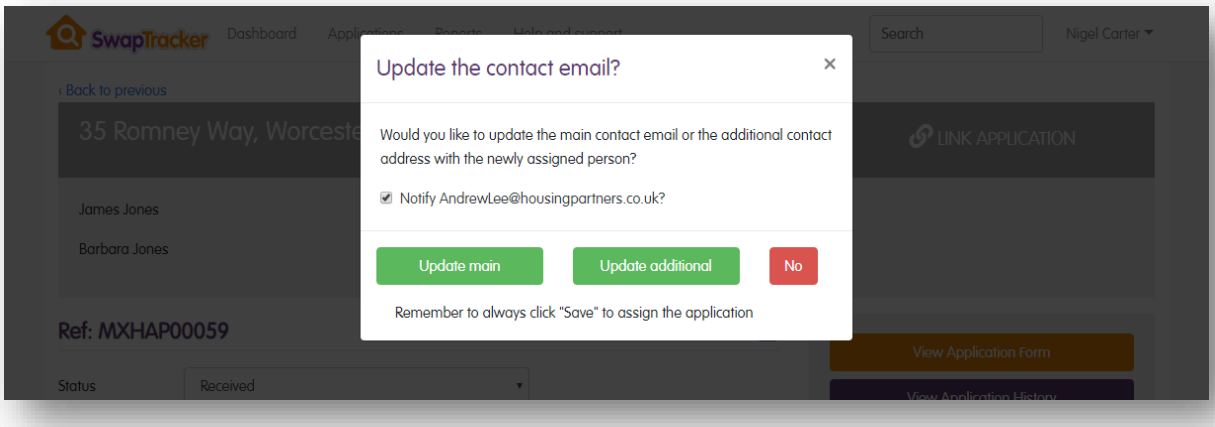


After selecting someone, you will be asked if you want them to be notified of this, i.e. they will receive an email telling them they've been assigned the application.

If you don't want this to happen, un-tick the "Notify" box.

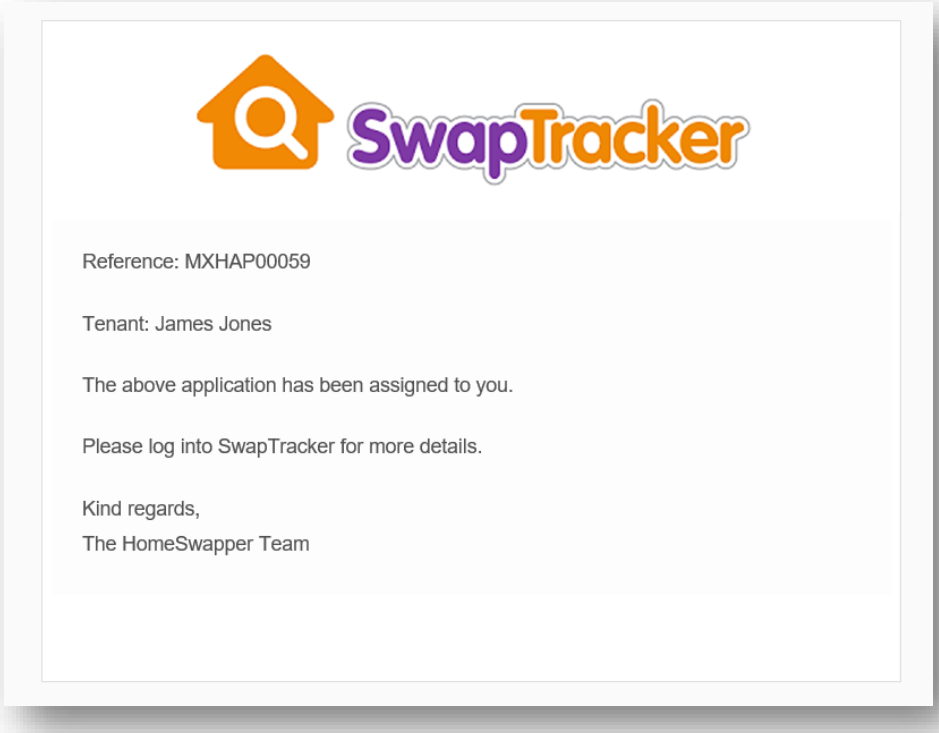
You are also given the option to "*Update main*" or "*Update additional*".

Clicking these will set that person's email address to the main contact email or additional contact email address for the application respectively. For example, if you wanted the application to have two email addresses to receive any notifications, click "*Update additional*".

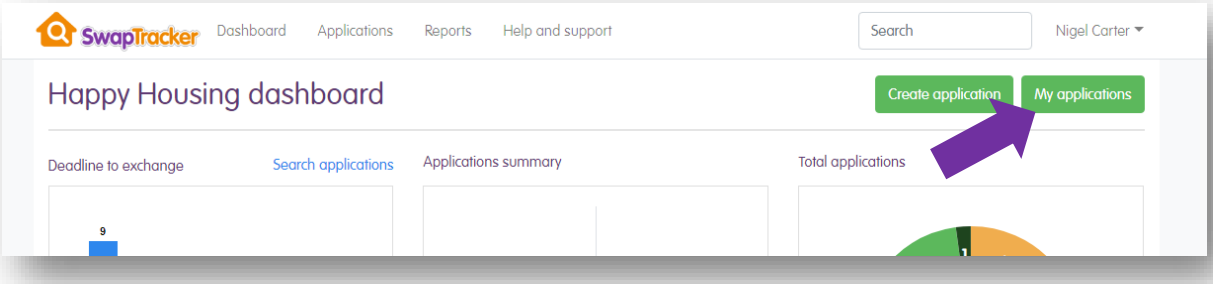


You must click "Save" for these changes to take effect.

If you have chosen to notify the user, they will receive an email like the one below:



To view all the applications that have been assigned to you, click on the "*My applications*" button on your SwapTracker dashboard.



Note: assigning an application to someone does not restrict anyone else from accessing it, e.g. if they were on holiday or absent due to sickness.

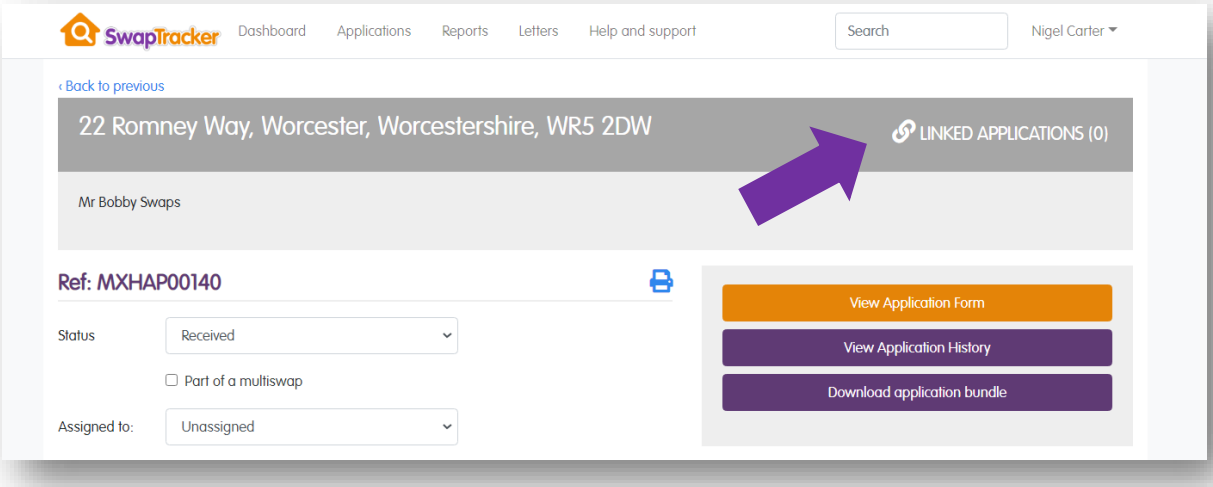
Assigning applications is simply a convenient way of grouping all the applications you are working on currently.

LINKING APPLICATIONS / MULTISWAPS

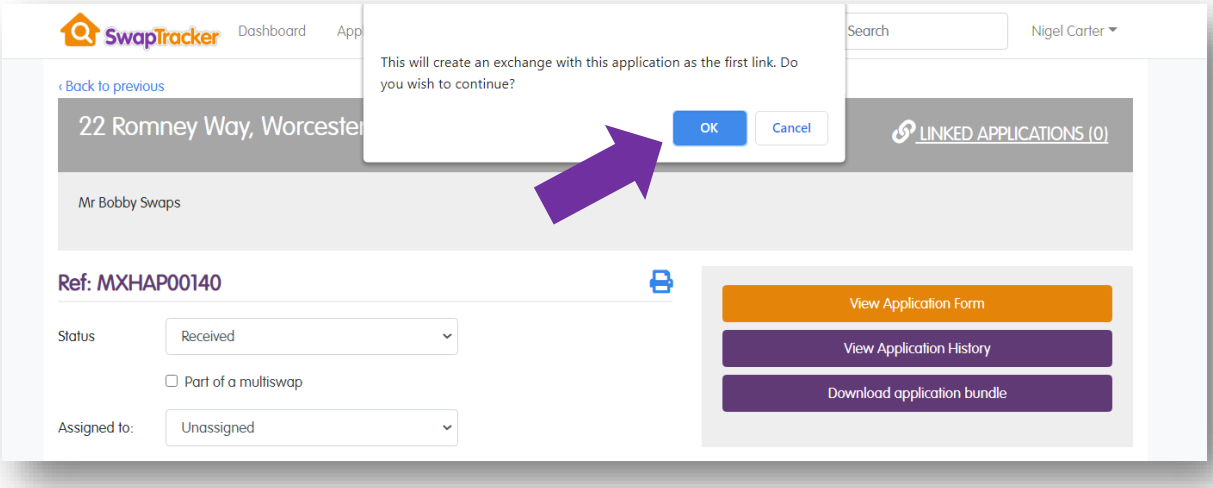
Using SwapTracker you can link all the applications involved in the overall exchange together, so you can see them in one place and keep track of progress. This can be done for just two applications for a direct swap, or more than two in the case of a multiswap.

Creating an "Exchange"

To start building an Exchange, go to the Application Summary of one of the applications involved (it's best to do this on the one you want to be shown as **number 1** in the Exchange) and click on the "*LINKED APPLICATIONS*" icon at the top of the page:



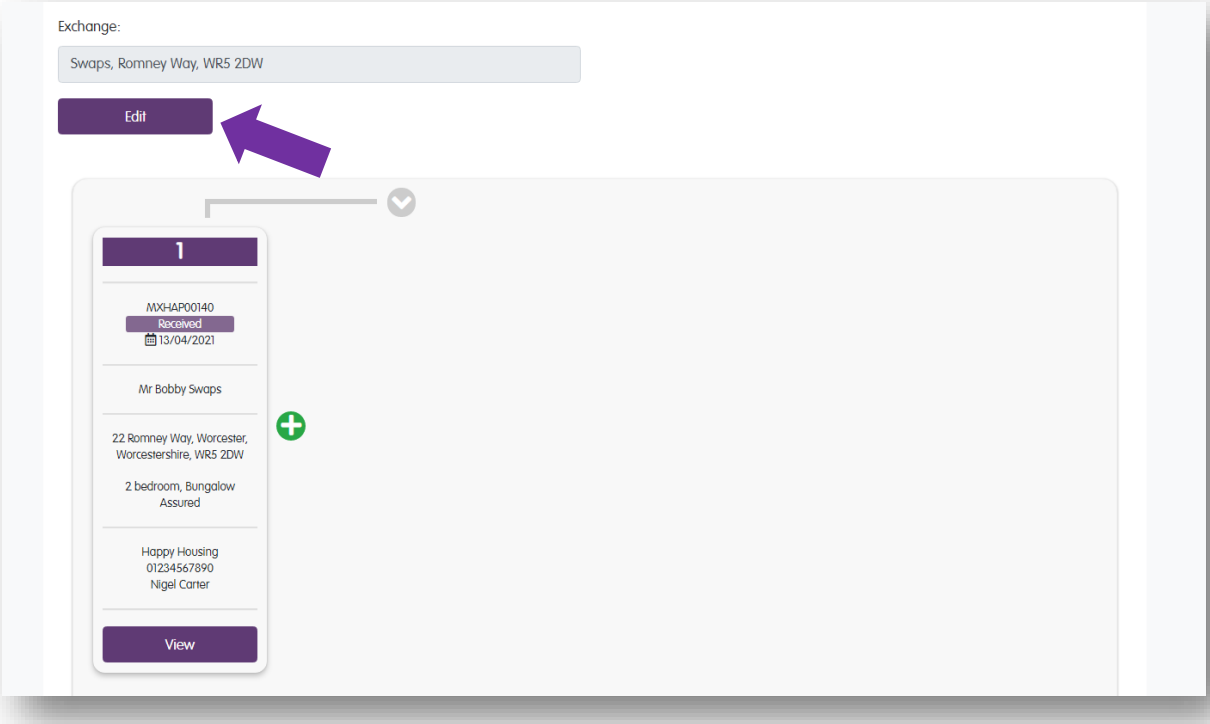
You will be prompted to confirm you want to create an Exchange. Simply click "*OK*" to continue. Don't worry, you can delete any Exchange later if you need to.



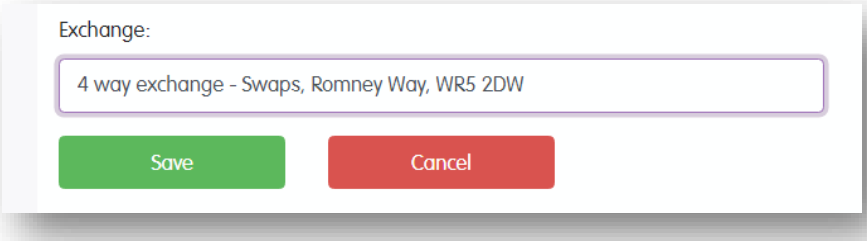
An Exchange is now created with the application you were viewing as number 1 in the chain.

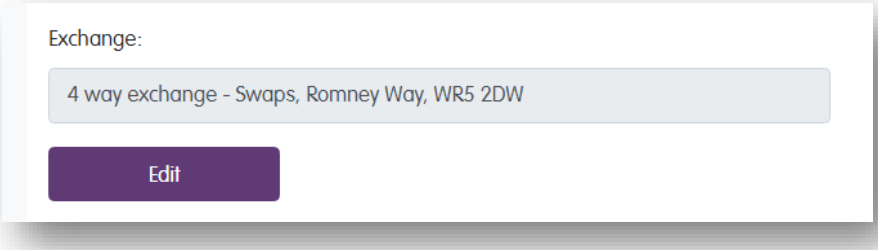
Each Exchange can also be given a name. By default, this is set to the last name of the main tenant, their street and postcode.

If you want to change the name, simply click the "*Edit*" button:

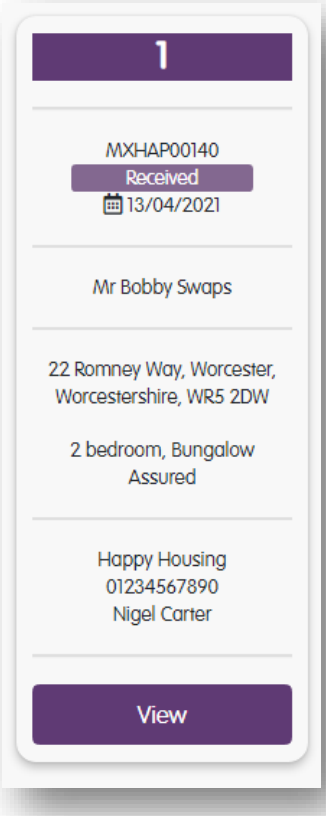


After entering a new name, click "*Save*" to make the amendment.





Each application in an Exchange shows the following information:



- Application reference number
- Status, e.g. New, Received, etc
- Date created
- Days until decision needed (if "In Progress")

- Main tenant name
- Joint tenant name (if applicable)

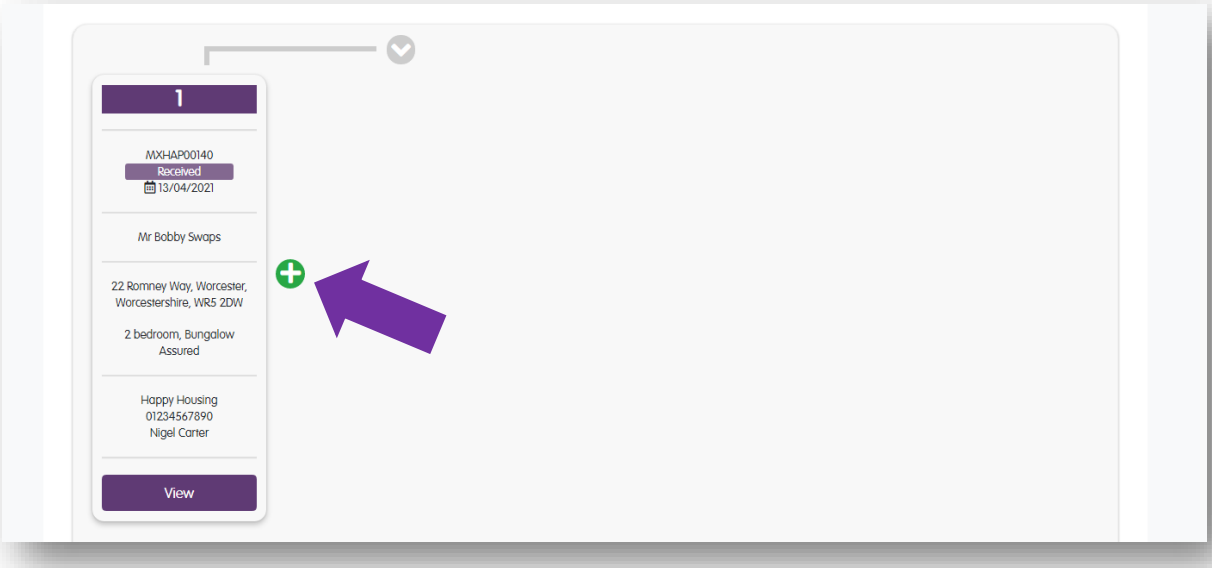
- Property address
- Property type and number of bedrooms
- Tenancy type

- Landlord name and contact information

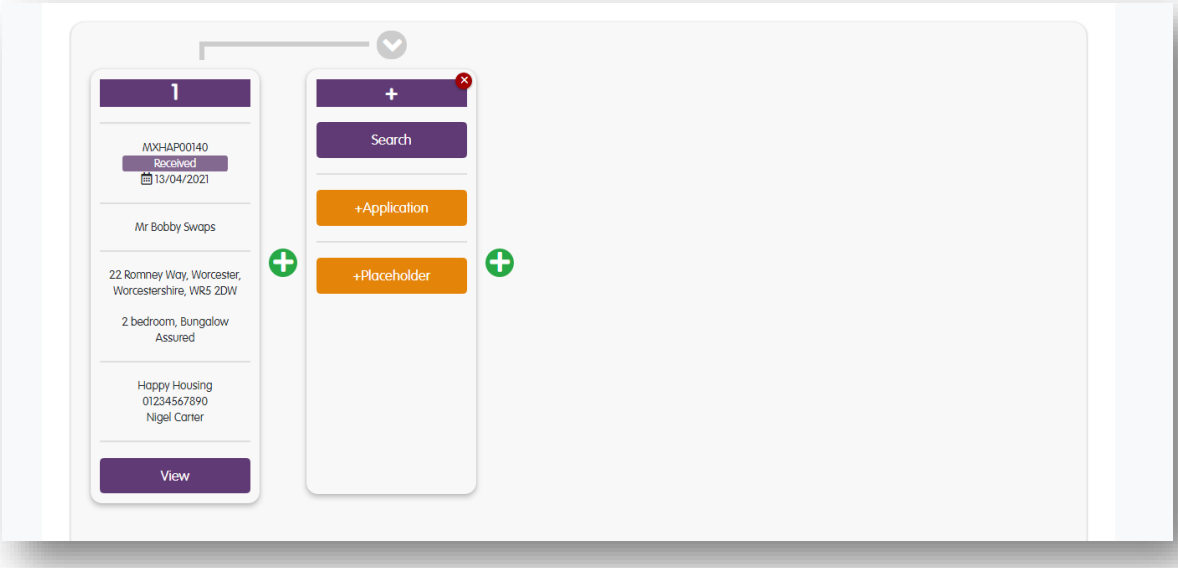
Clicking the "*View*" button will take you to the Application Summary for that application.

Adding links to your Exchange

To add more links to your Exchange, click on the "+" icon:



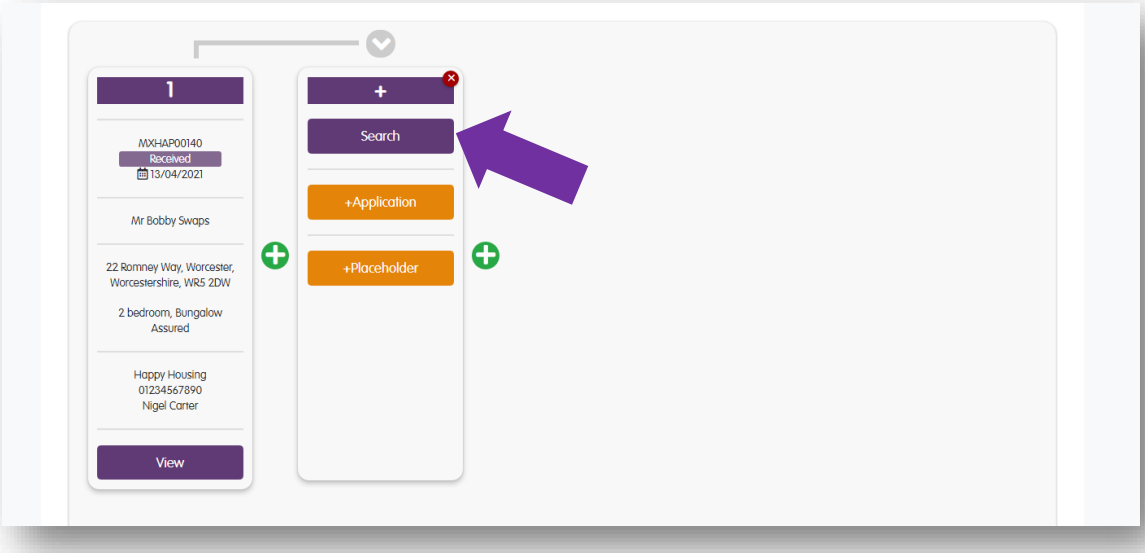
You then get 3 options for the types of link you can add:



- *Search* – find an existing application in SwapTracker and add that to the Exchange
- *+Application* – create a **new** application in SwapTracker and add this to the Exchange
- *+Placeholder* – create a "placeholder" and add this to the Exchange.

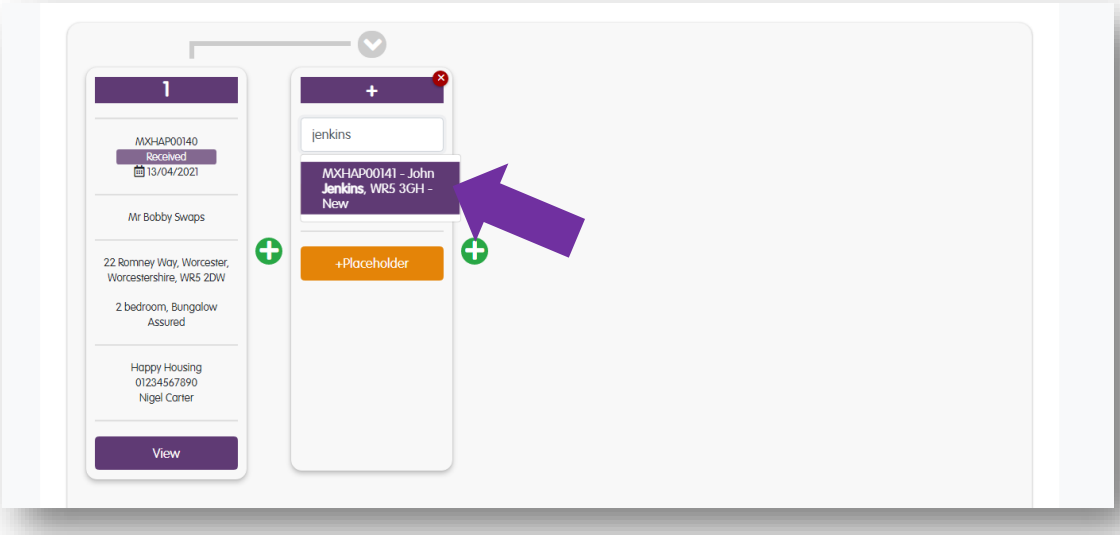
Adding an a existing SwapTracker application to the Exchange

Clicking the "*Search*" button on a new link allows you to search for an application already in SwapTracker and add that to your Exchange.

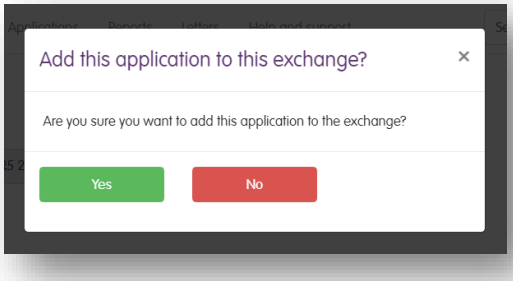


Use the search box that appears to find the application you want to add. You can search by tenant name, address, and the application reference number.

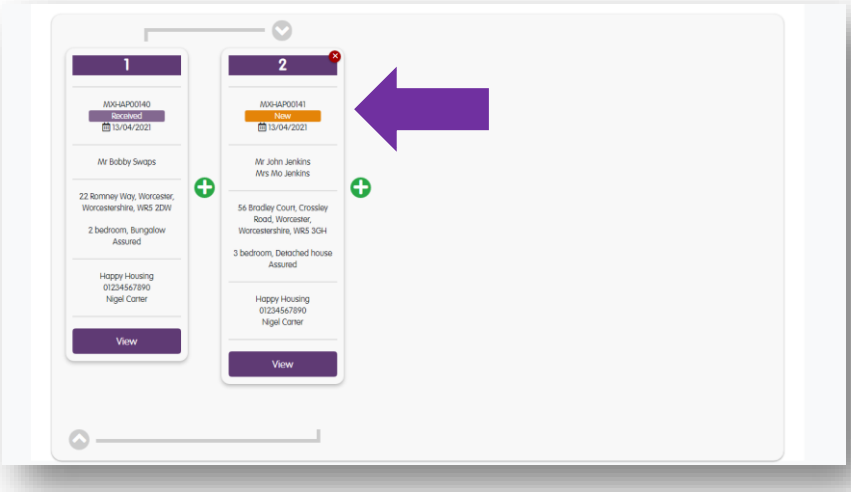
As you type, a list of matching applications is shown. Click on the one you want to add.



Before the application is added, you need to confirm this. Simply click "*Yes*" to continue:

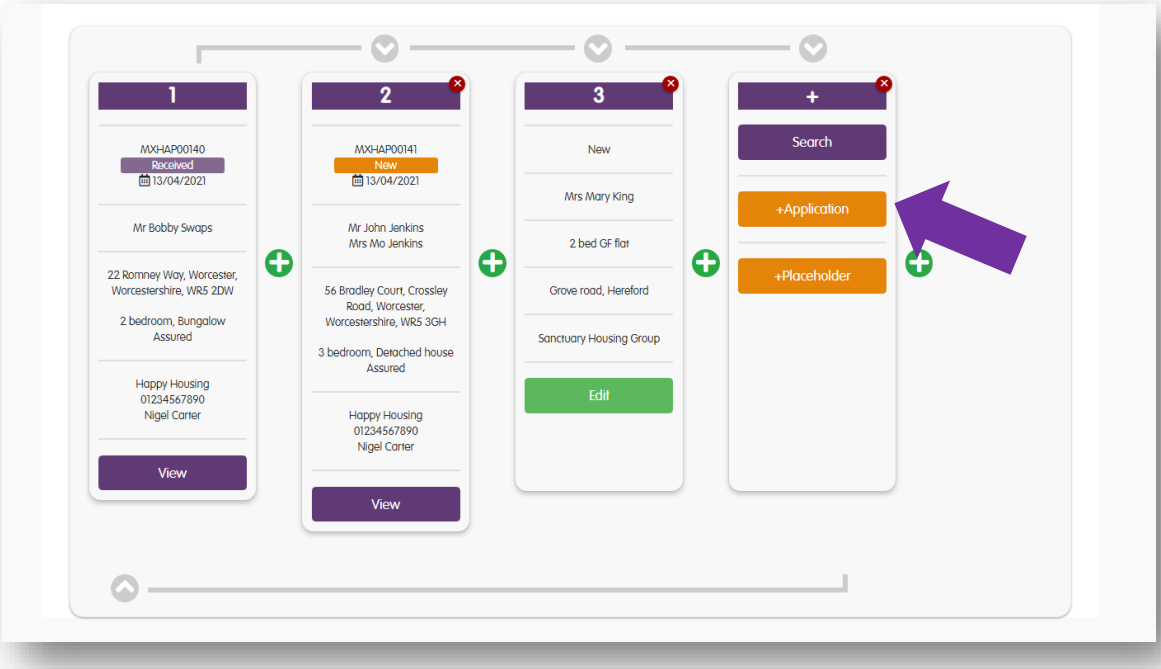


The application you selected is now added to the Exchange.

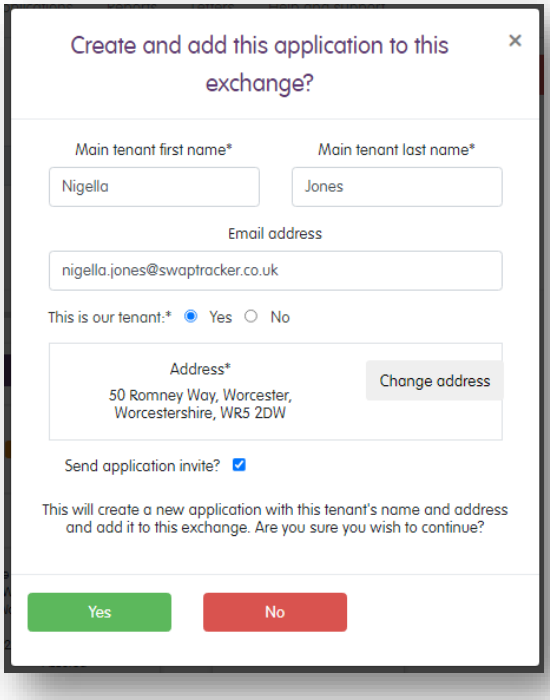


Creating a new application for the Exchange

Clicking the "+*Application*" button on a new link allows you to create a new application and add that to your Exchange.



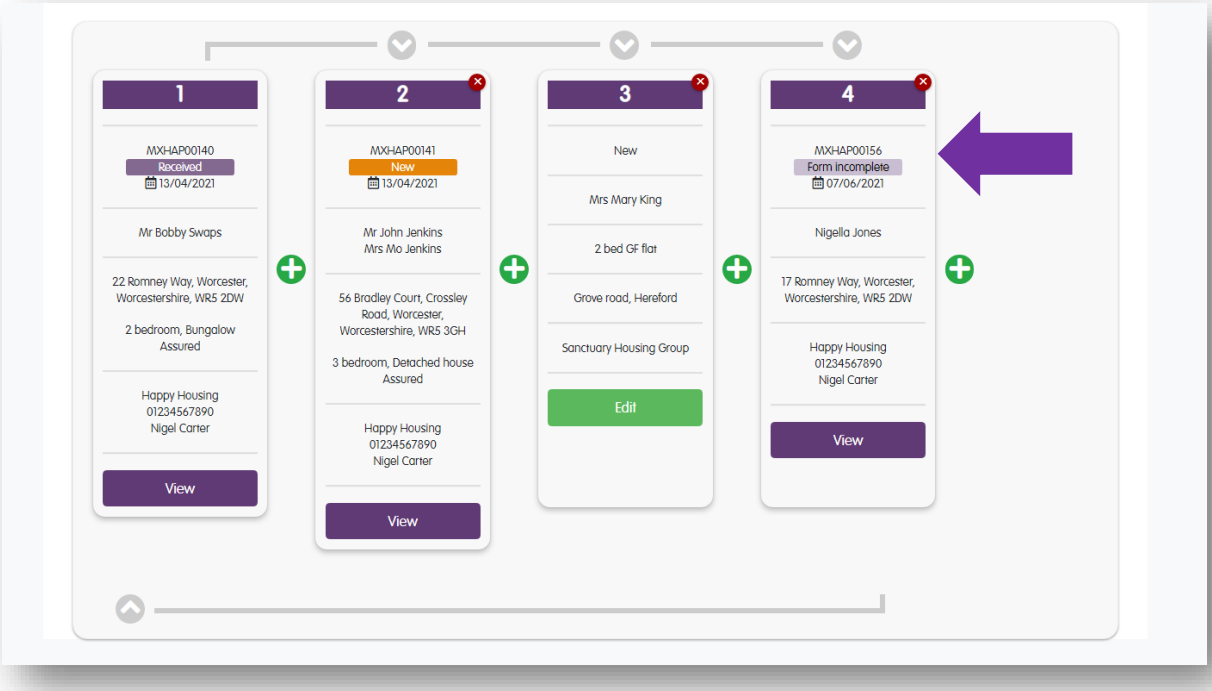
You then need to enter some basic details about the application you want to create:



The information required is:

- Main tenant first name (mandatory)
- Main tenant last name (mandatory)
- Email address (optional)
- This is our tenant (mandatory) – if "Yes" is selected your organisation is set as the main tenant's current landlord
- Tenant address (mandatory)
- Send application invite (optional) – if this is selected an application invite will be sent to the tenant. Note: you must enter an email address for this work. For more information see How tenants apply (NOT Using HomeSwapper)

Clicking the "*Yes*" button will create a new SwapTracker application using these details and add it to the Exchange:



The application is added with a status of "Form incomplete" and a new MX reference number is assigned.

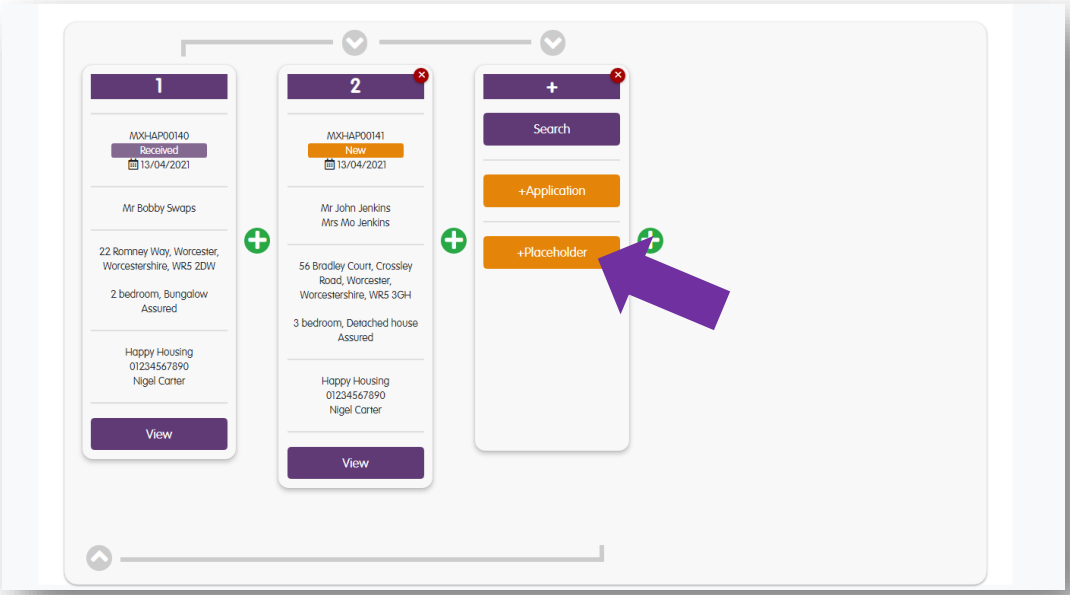
To view details of this new application simply click the "*View*" button to go the Application Summary page.

Adding a "Placeholder" to the Exchange

There will be some links in the Exchange for which you won't require a SwapTracker application, e.g. where neither household involved are your tenants nor moving into one of your homes.

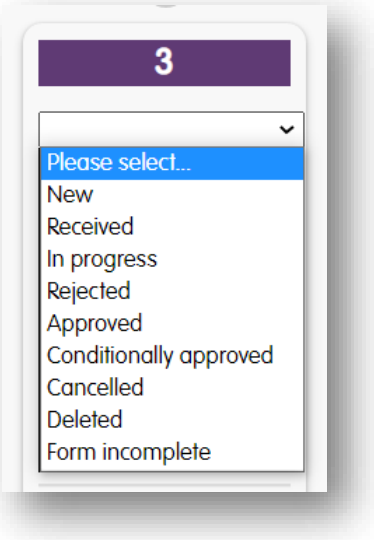
However, so you can still see the whole Exchange in one place, you can add a "placeholder" to represent these links.

Clicking the "*+Placeholder*" button on a new link allows you to do this:

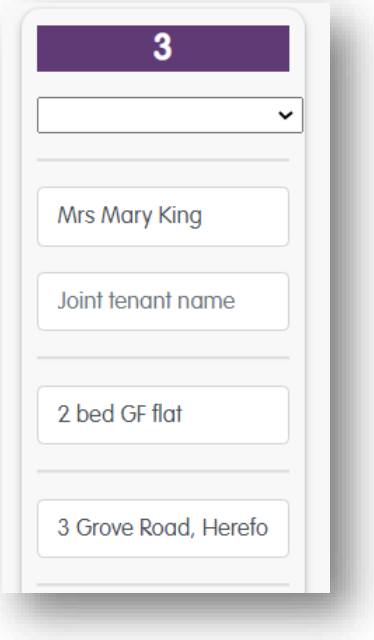


You will then be prompted to enter any information you know about this link in the Exchange.

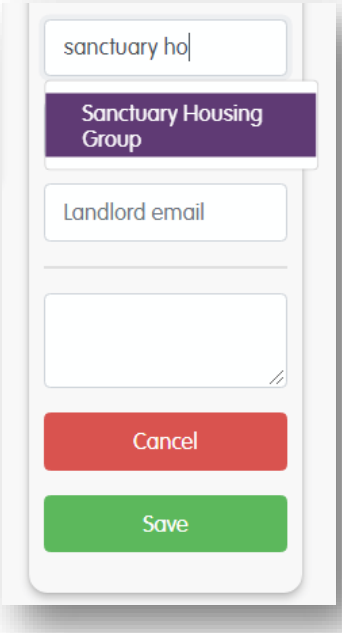
All this information is optional. Simply fill in as much as you know. You can always add more details later.



- Application status – e.g. New, Received, etc.



- Main tenant name
- Joint tenant name
- Property description, e.g. 2 bed house, etc
- Property address



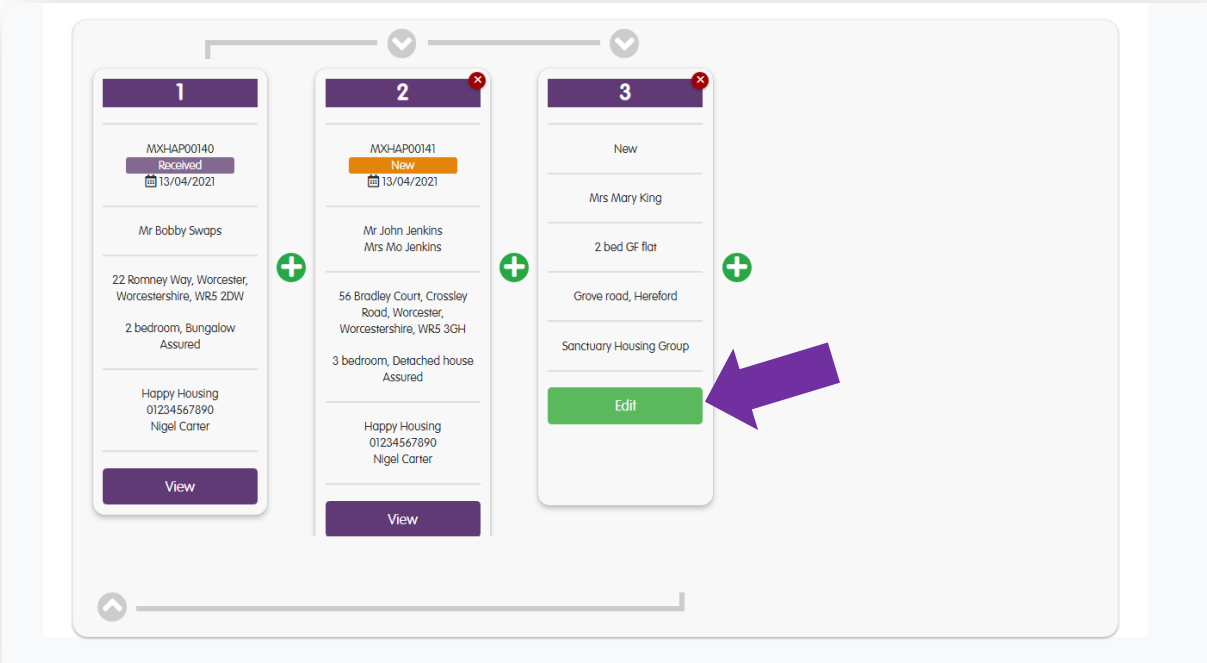
- Landlord name – start typing the name and a list of matching landlords will be shown

- Landlord telephone
- Landlord email

- Text Note – use this to enter any additional information you want to keep regarding this link in the Exchange

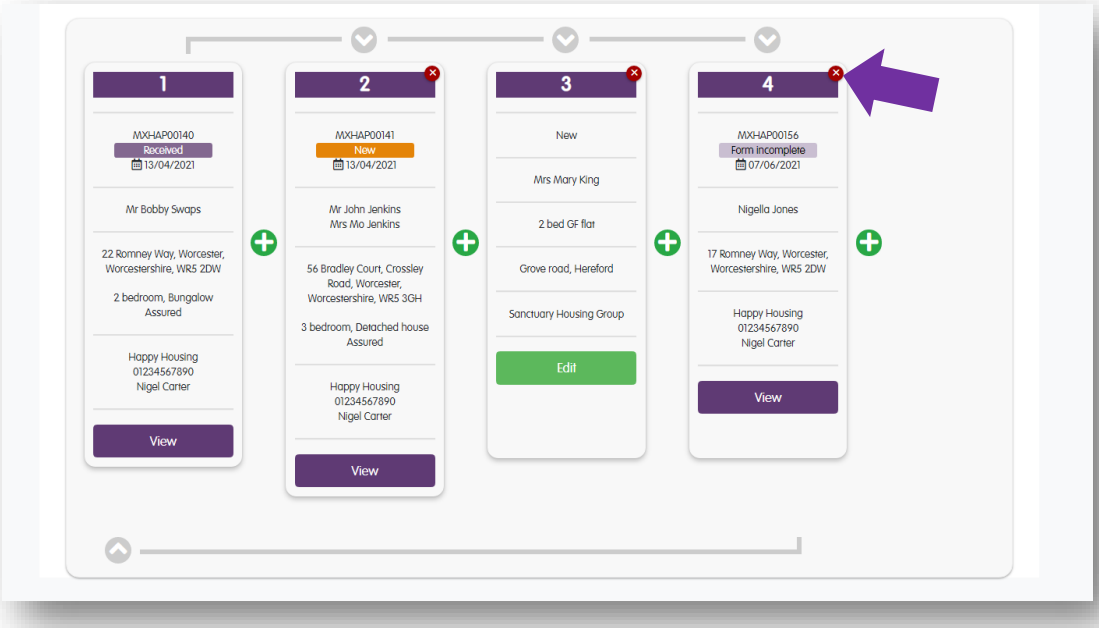
After completing the information you have, click "*Save*" to create the "Placeholder" and add it to the Exchange.

To change any of these details later, click "Edit" on that link in the Exchange:



Removing links from your Exchange

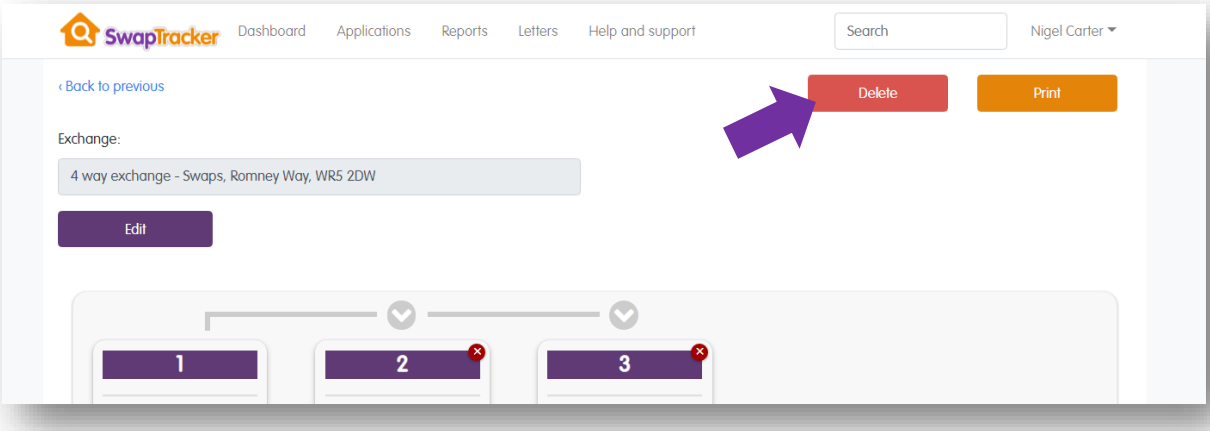
To remove a link from your Exchange, click on the red "x" icon next to the link you want to remove:



Note: Removing a link does not delete the application. It simply takes it out of the Exchange.

Deleting an Exchange

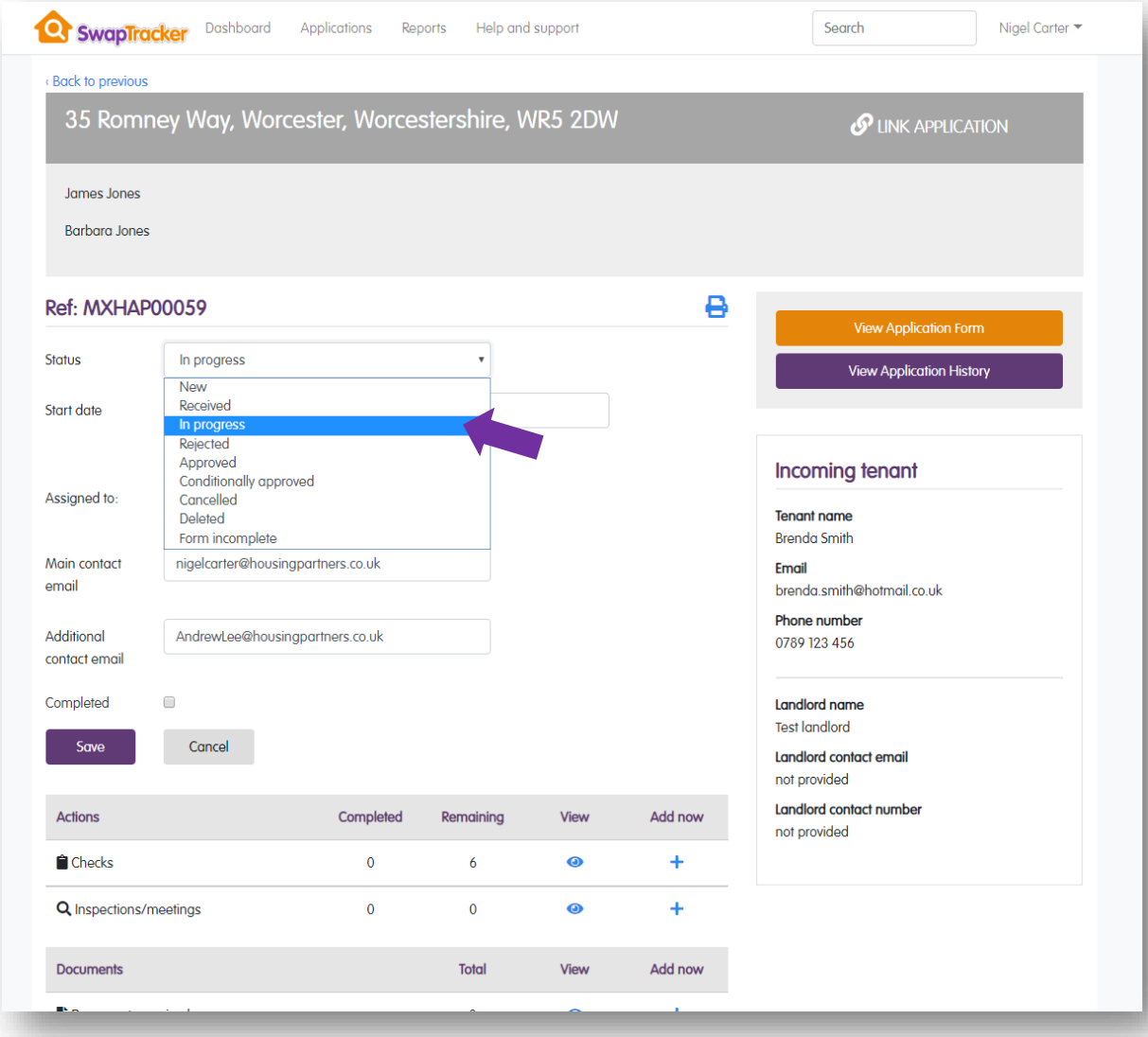
To delete the whole Exchange, click on the "Delete" button at the top right of the page:



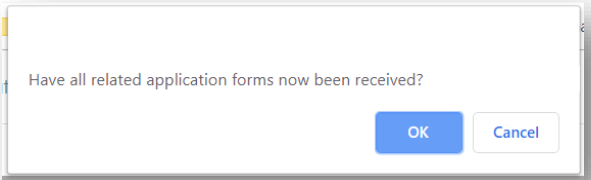
Note: Deleting an Exchange does not delete any of the applications.

SETTING APPLICATIONS TO "IN PROGRESS" (STARTING THE 42 DAYS)

Setting the application status to "In progress" will notify the tenant that their application is now in progress and advise them of the date by which they can expect a decision.



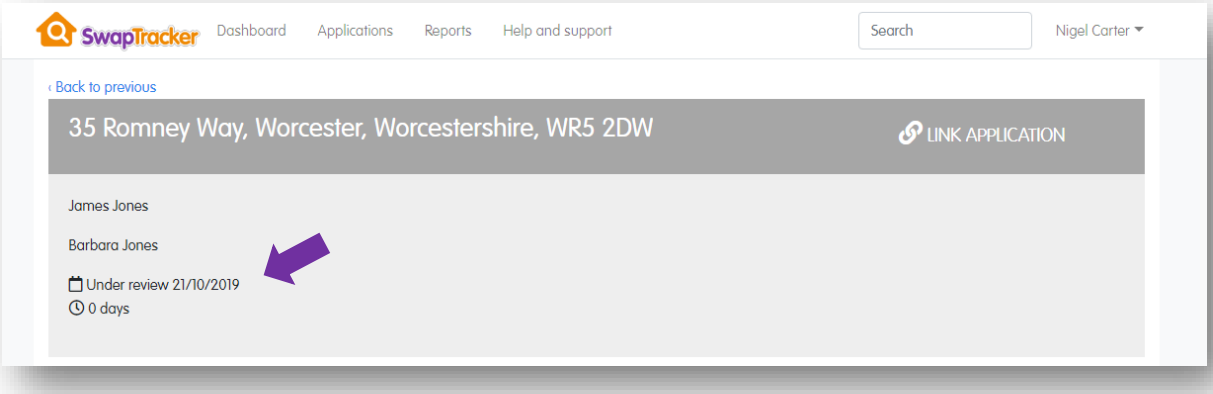
When selecting "In Progress" from the Status list a warning is shown:



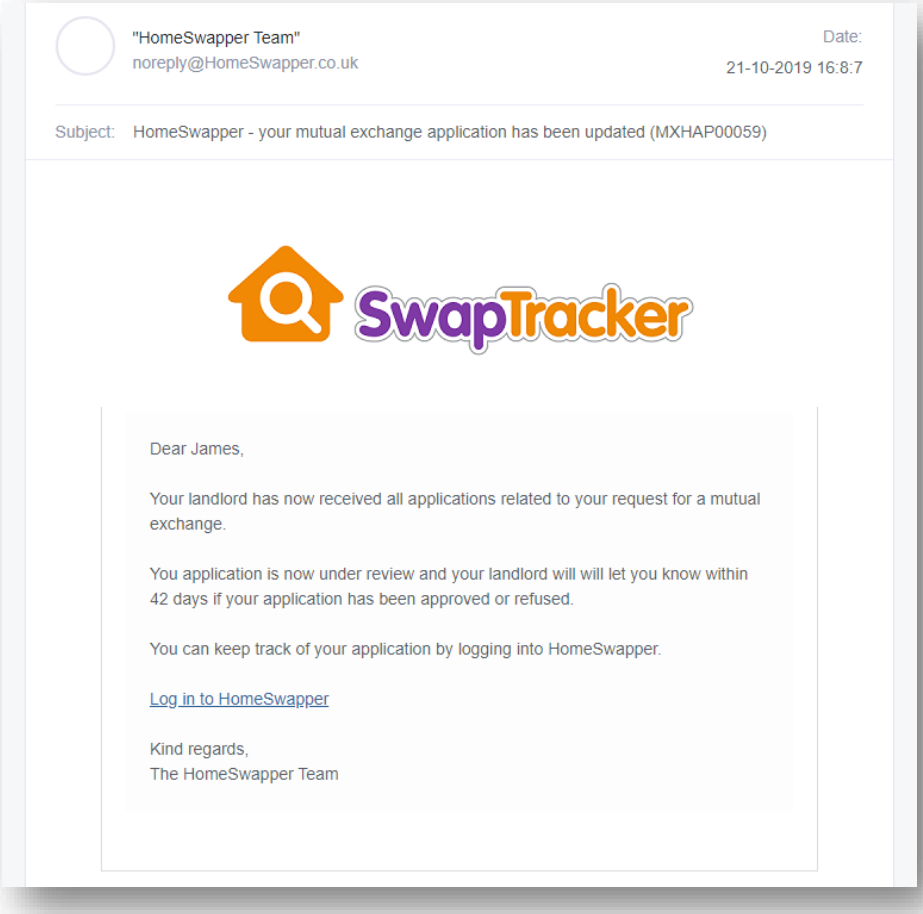
Click "OK" to proceed or "Cancel" if you are not ready for the application to be regarded as "In Progress" and the 42 days to begin.

You must click "Save" for these changes to take effect.

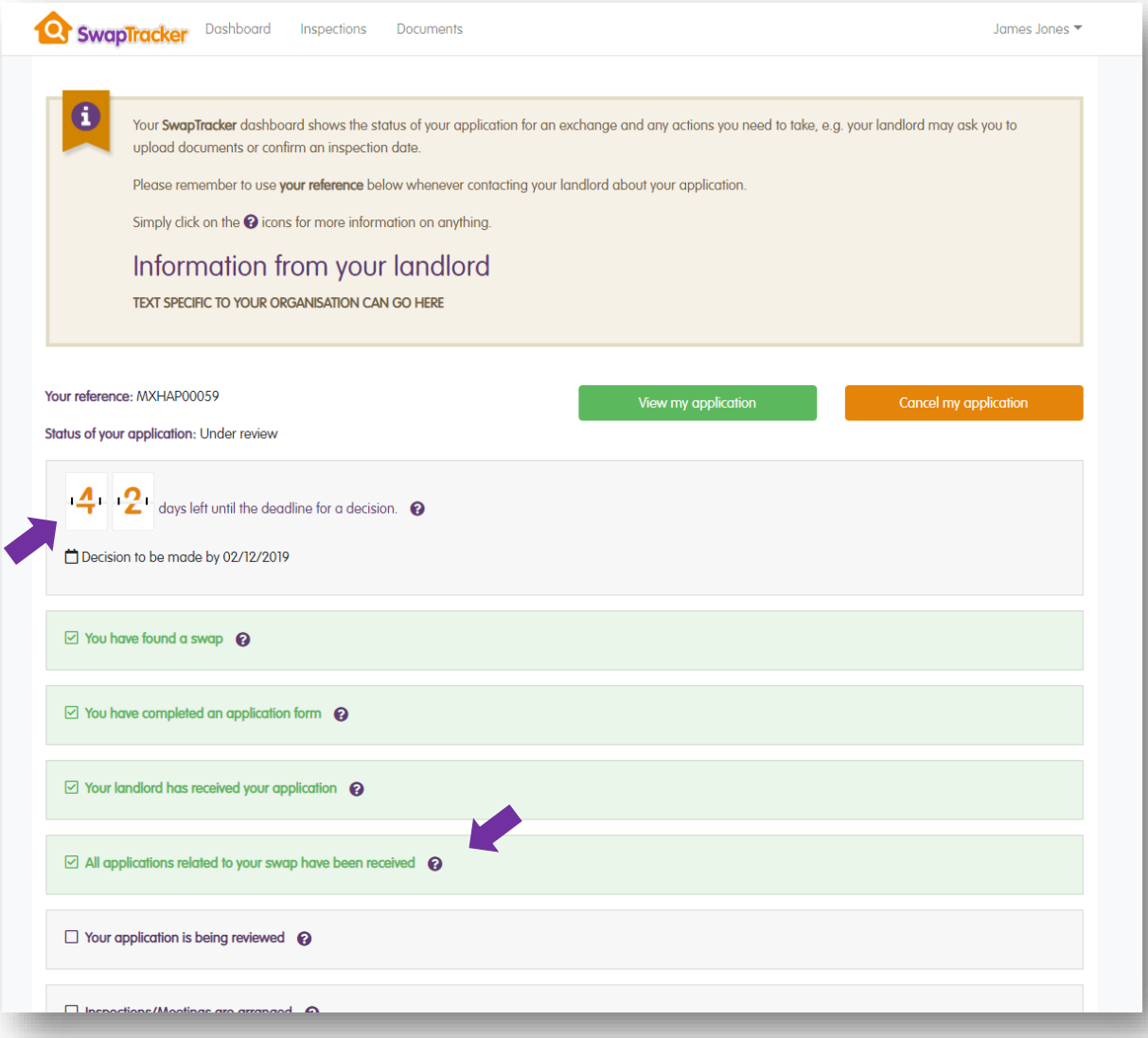
The Application Summary now shows the date the application went under review (i.e. the 42 days starts) and how many days have passed since then:



The tenant is sent an email notification informing them the status of their application has changed:



When they log into SwapTracker they can then see the status of their application has changed and are shown a 42-day countdown clock showing then they should receive a decision by:

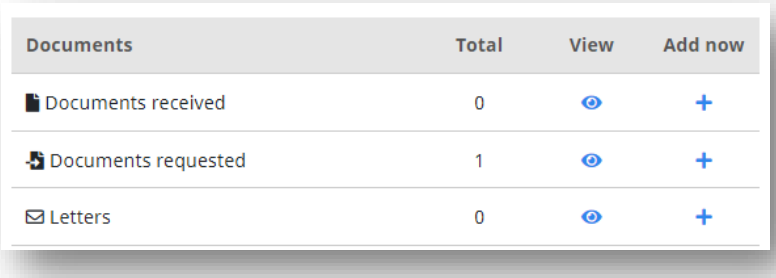


DOCUMENTS

Documents can be uploaded and stored securely against an application.

These can either be uploaded by you or a request sent to the tenant for them to upload the document themselves via SwapTracker.

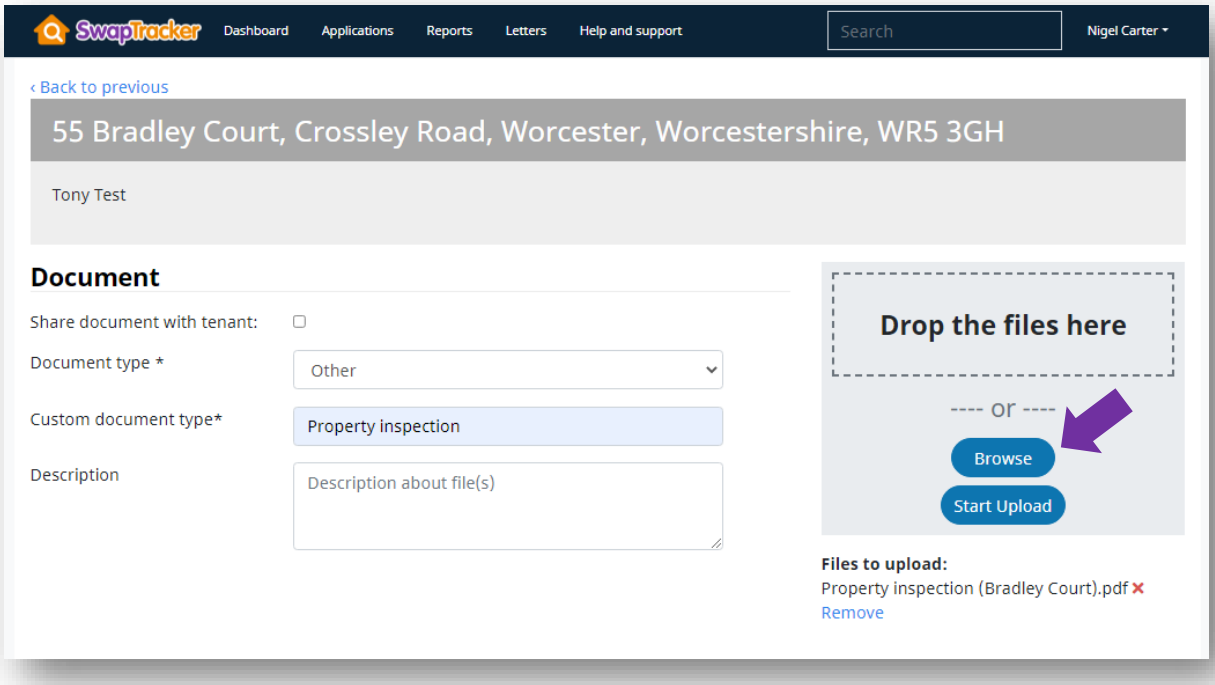
Documents can be uploaded/requested from the "*Documents*" section of the Application Summary.



Document uploads ("Documents received")

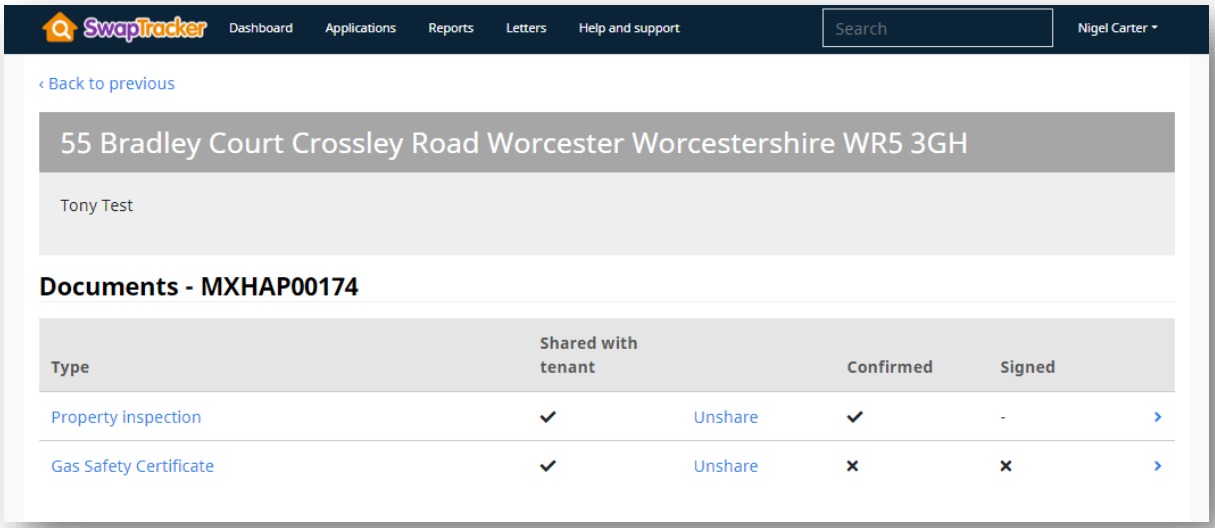
To upload a document on behalf of the tenant, first select the type of document from the list and enter any additional information in the Description box (this is optional).

To add the files, you can either "drag and drop" them into the "*Drop the files here*" box or browse to them on your PC/device by clicking the "*Browse*" button.

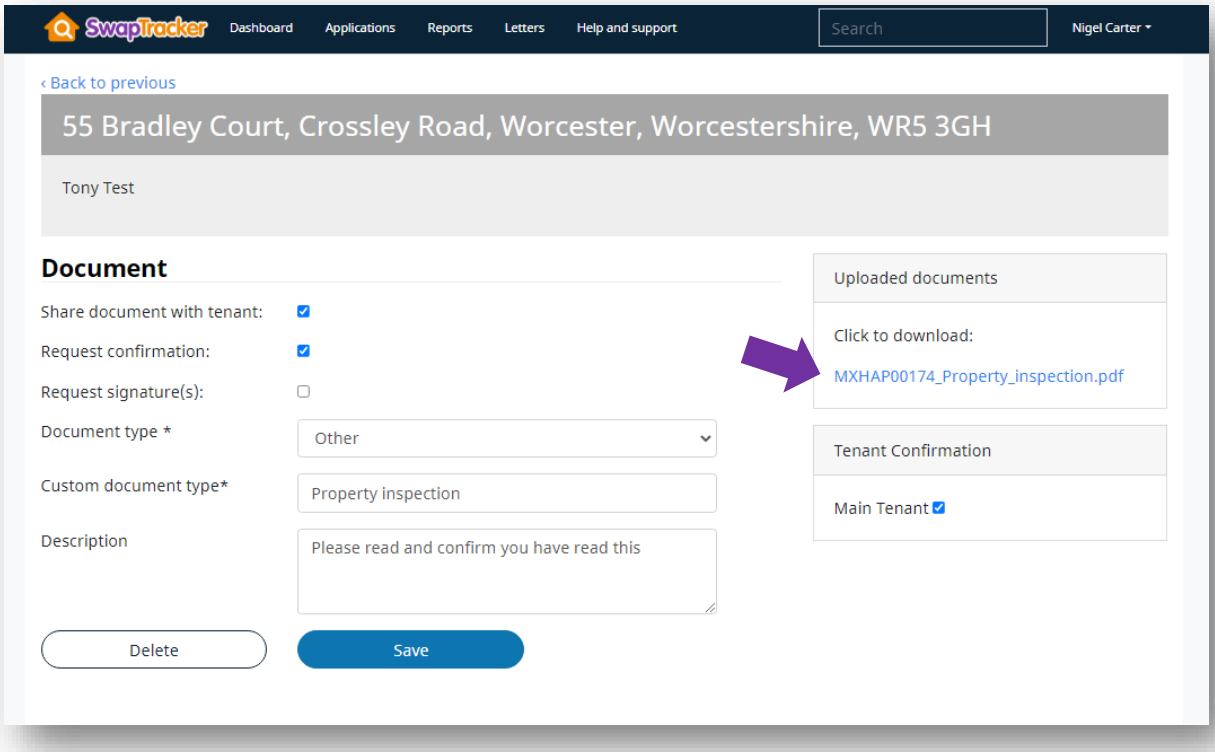


You may upload more than one file if required. Clicking "*Start Upload*" will upload the files to the SwapTracker server and store them against the application.

The Documents list shows all documents uploaded for an application.



To view previously uploaded documents simply click on the file name to download the file.



Please note: after a document has been uploaded it cannot be changed. However, you can update the Description.

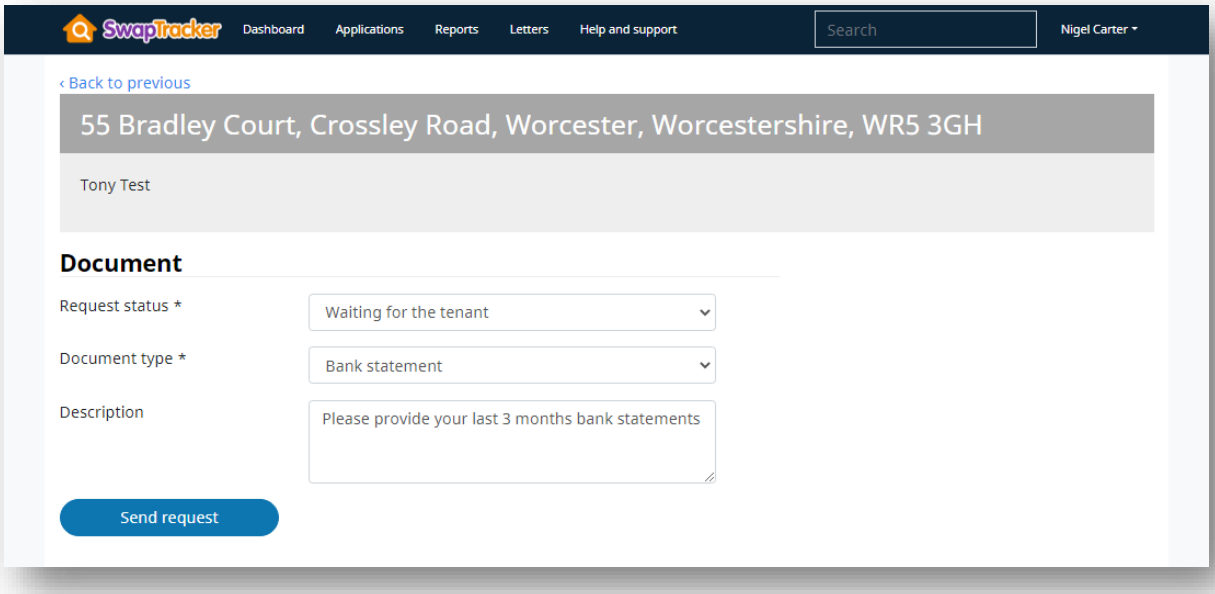
If you must change a document, you will need to delete the original and create/upload a new one.

Document requests

Sending a request to the tenant

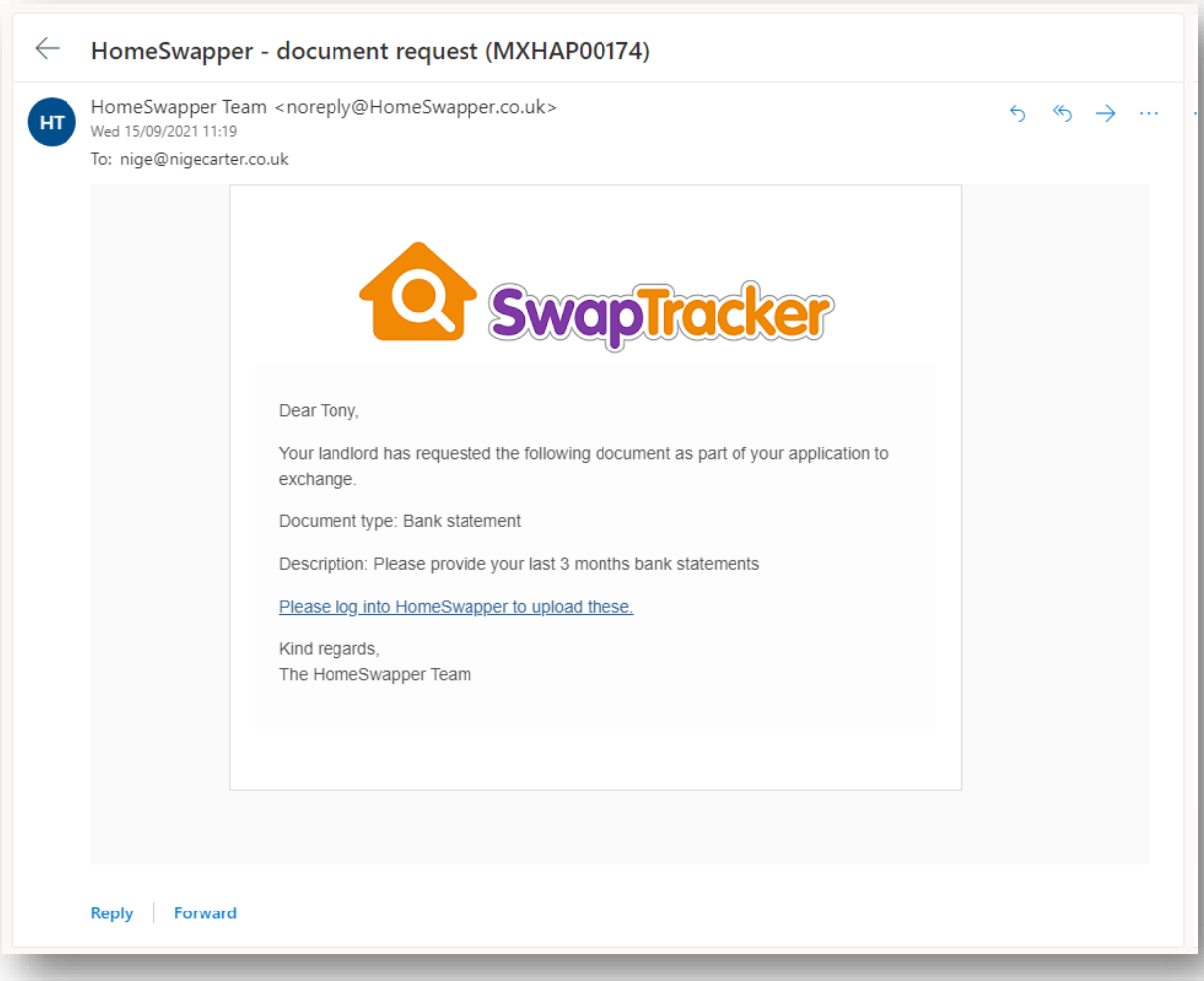
To request document(s) from the tenant, select the type of document you require from the list and add any supporting information in the Description box.

If you require a type of document not in list, select "*Other*" and enter the type you need in the box provided.



Clicking "*Send request*" will email the tenant and add a notification to their SwapTracker dashboard.

At this stage, the status of the request is "*Waiting for the tenant*".



HomeSwapper - document request (MXHAP00174)

HT HomeSwapper Team <noreply@HomeSwapper.co.uk>
Wed 15/09/2021 11:19
To: nige@nigecarter.co.uk

SwapTracker

Dear Tony,

Your landlord has requested the following document as part of your application to exchange.

Document type: Bank statement

Description: Please provide your last 3 months bank statements

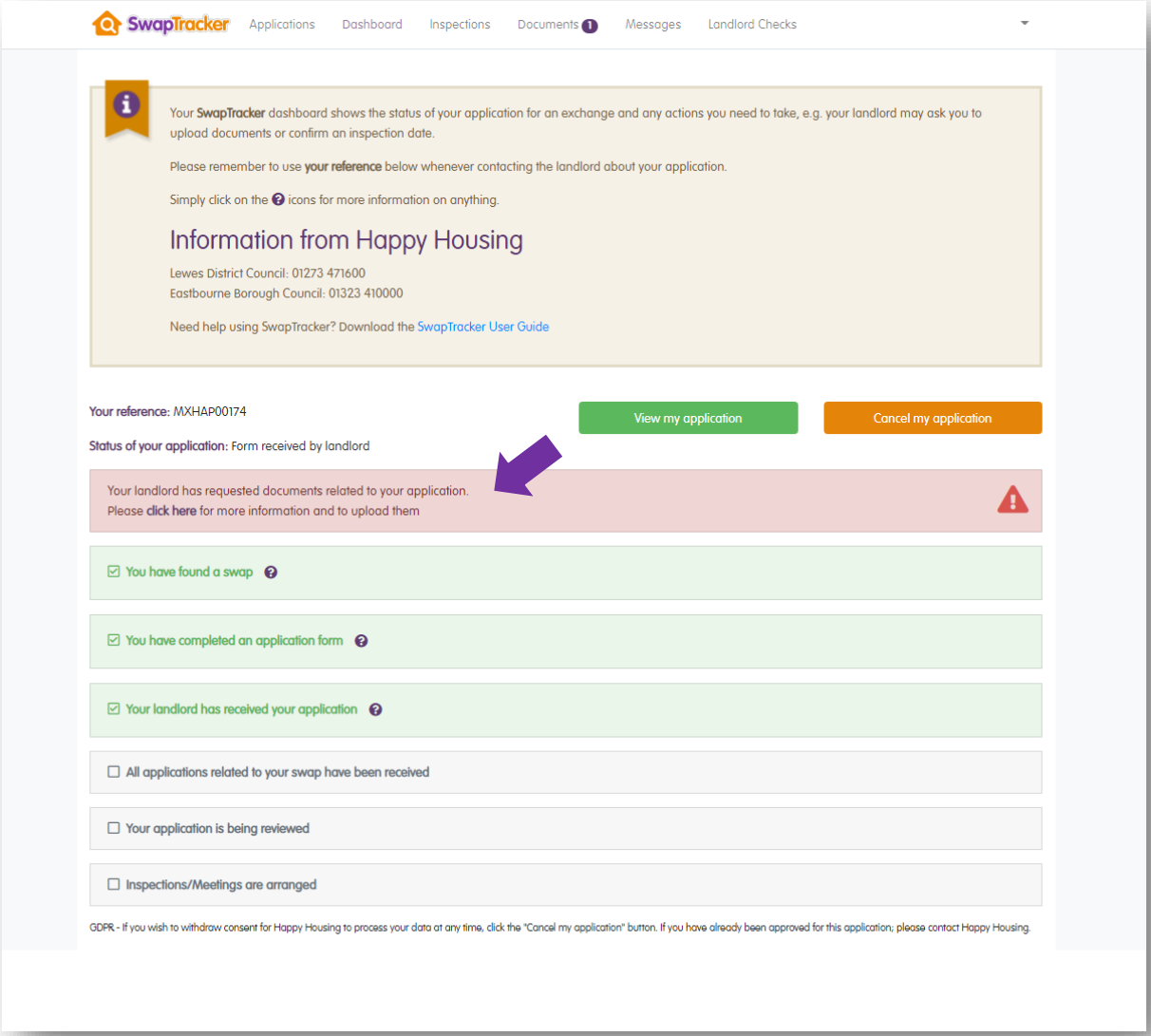
Please log into HomeSwapper to upload these.

Kind regards,
The HomeSwapper Team

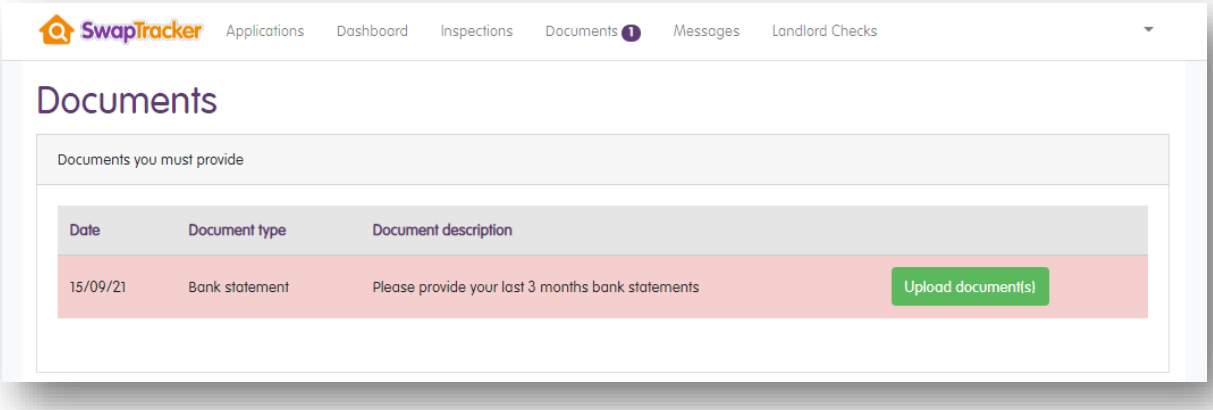
Reply | Forward

How the tenant responds

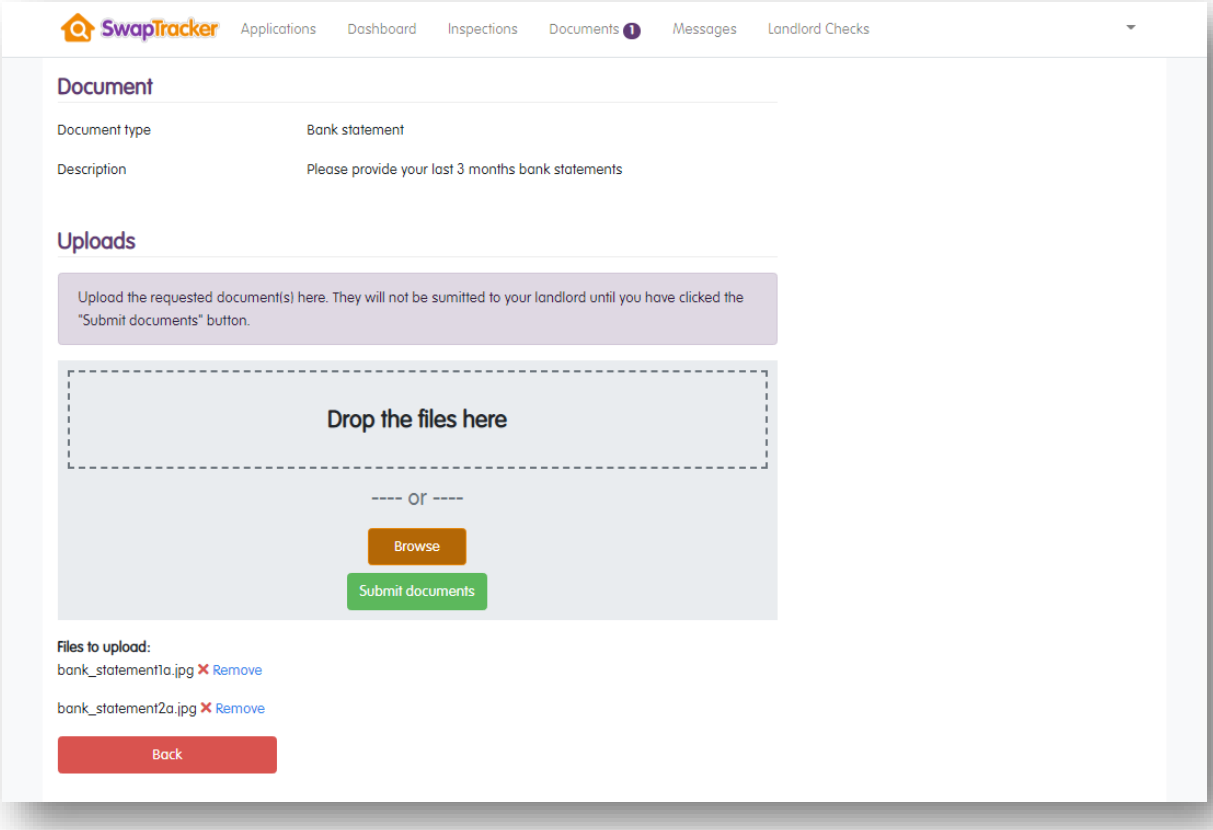
When the tenant logs into SwapTracker, they are prompted to supply the document(s) you have requested.



Clicking the prompt shows them details of the document(s) they need to provide:



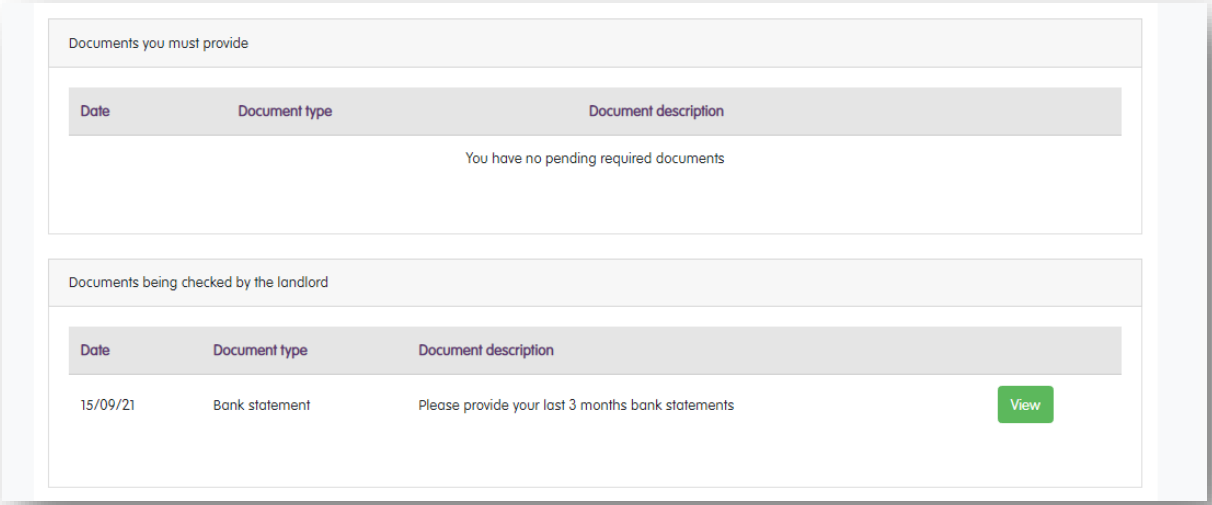
When they click the "*Upload document(s)*" button they are taken to a page where they can upload the files.



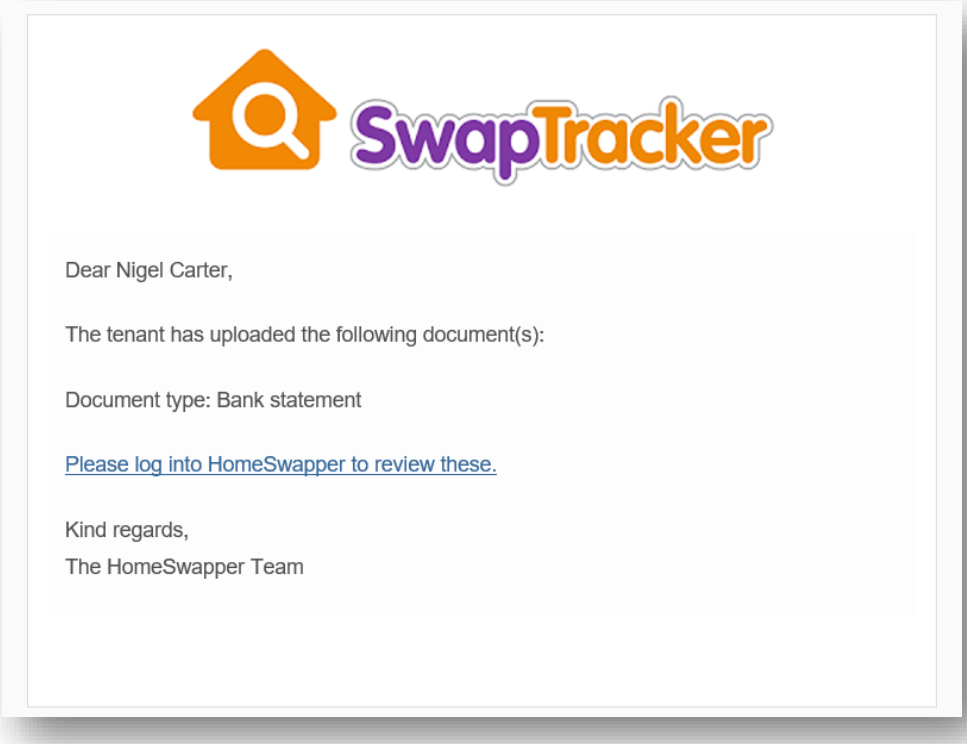
This has a simple tool for dragging and dropping files from the laptop/desktop computer or they can take photos when using a mobile device (phone or tablet).

When they have added all the documents required, they click on "*Submit documents*" to submit them to you.

The document request then moves from their "*Documents you must provide*" list to their "*Documents being checked by the landlord*" list:



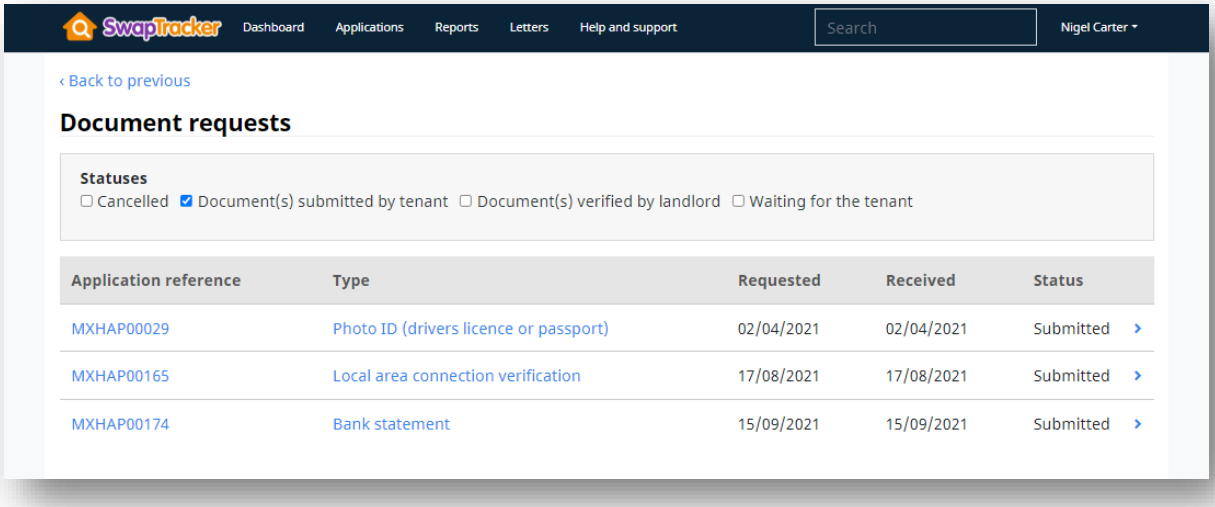
An email notification will be sent to the contact address(es) for the application:



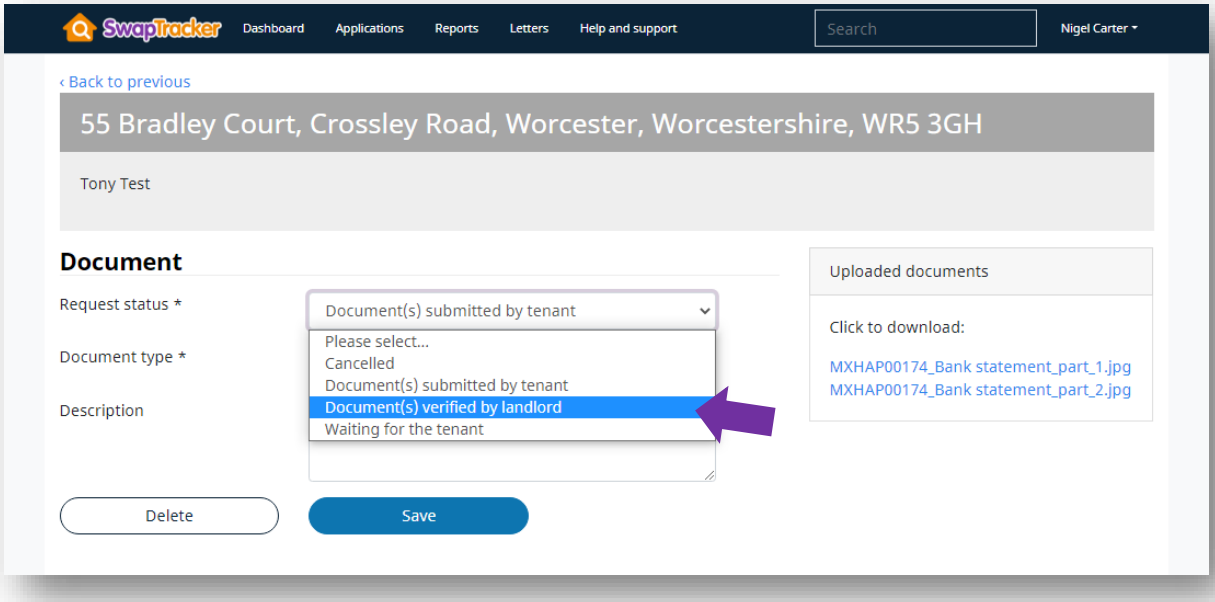
Reviewing tenant documents

When new documents have been uploaded by the tenant, these should be reviewed to check they are suitable and correct.

Clicking on the "*received requests*" total on the "*Document requests*" section of your SwapTracker dashboard takes you to the full list of document requests that have been received from tenants:



When you have reviewed the document(s) and are happy with them, set the status of the request to "*Documents verified by landlord*" and click "*Save*".

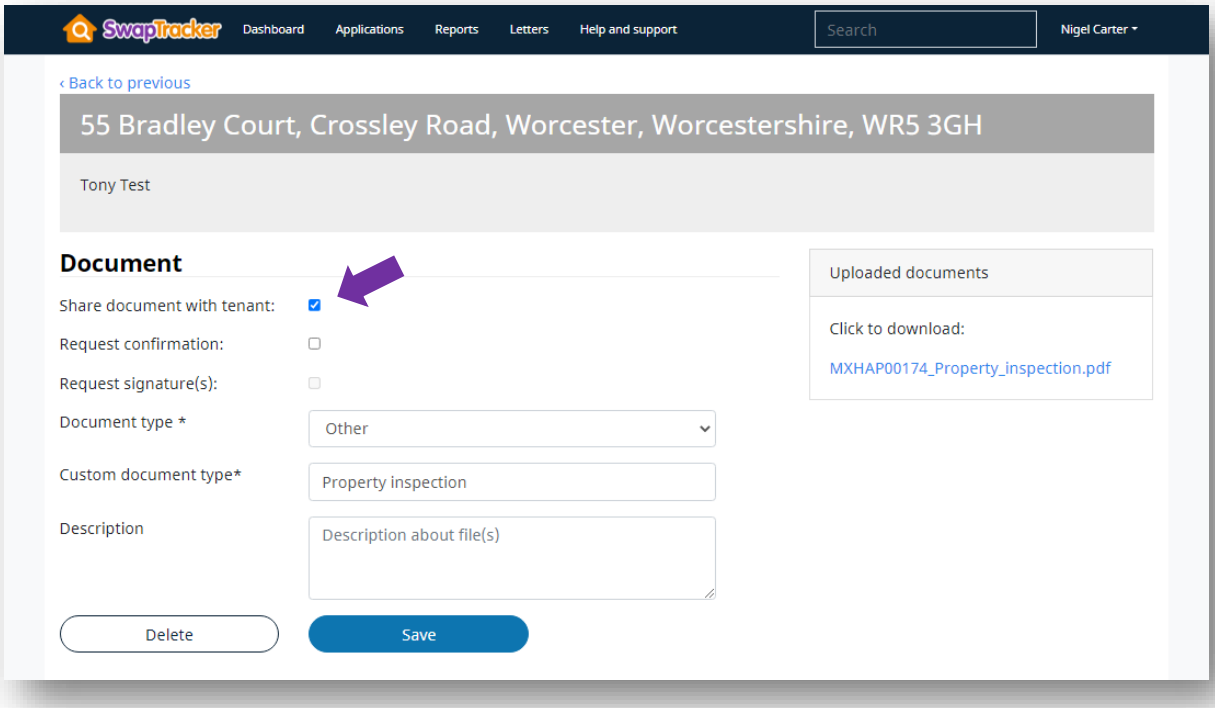


If there are any issues with the documents provided by the tenant, either set the status to "*Waiting for tenant*" again or cancel/delete the request and create a new request instead.

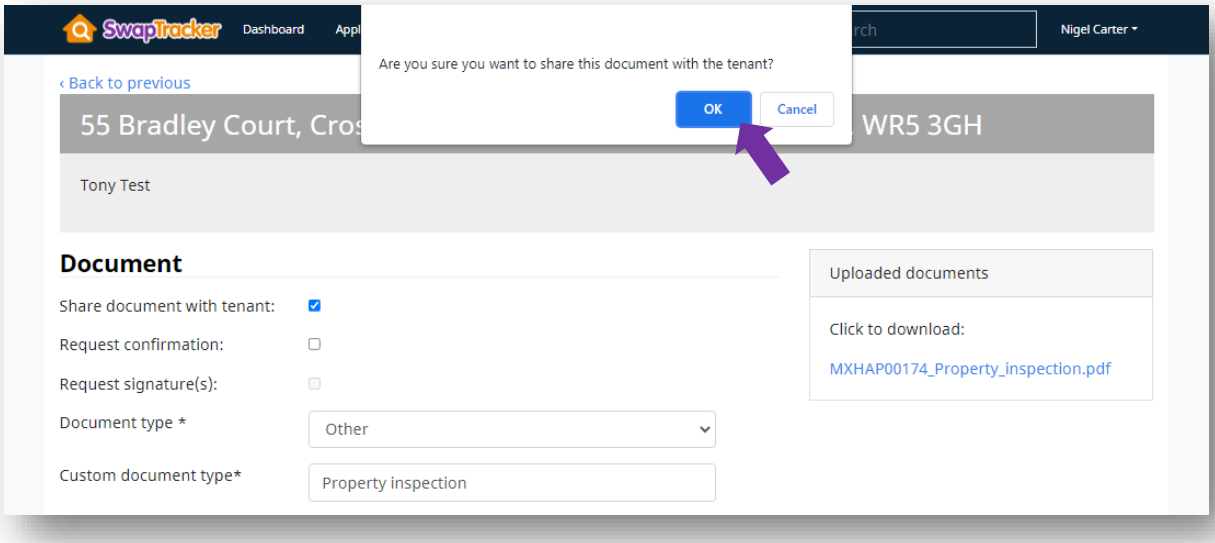
Sharing documents with tenants

If you want to provide more transparency and keep the tenant up to date, you can also choose to "share" the documents you upload against their application.

To share a document with a tenant simply tick the "Share document with tenant" box:



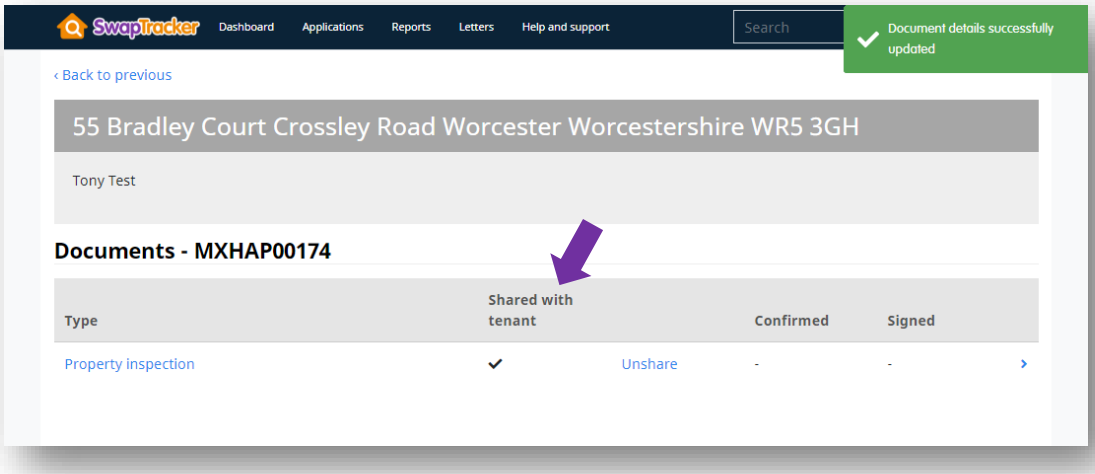
When you click "*Save*" you will then be asked to confirm you wish to share it:



Sharing documents allows the tenant to see them on their SwapTracker.

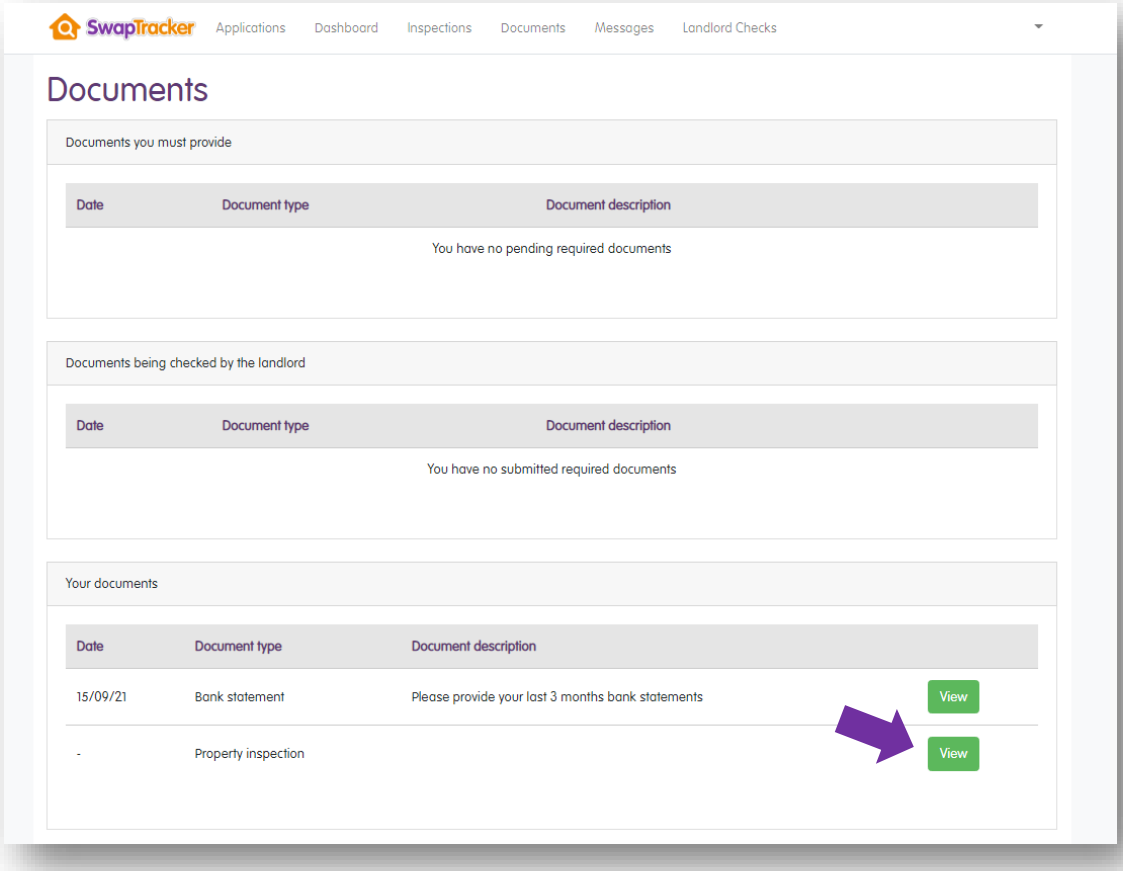
Note: by default, documents are NOT shared with tenants. However, they can still see any documents they themselves have uploaded that you requested.

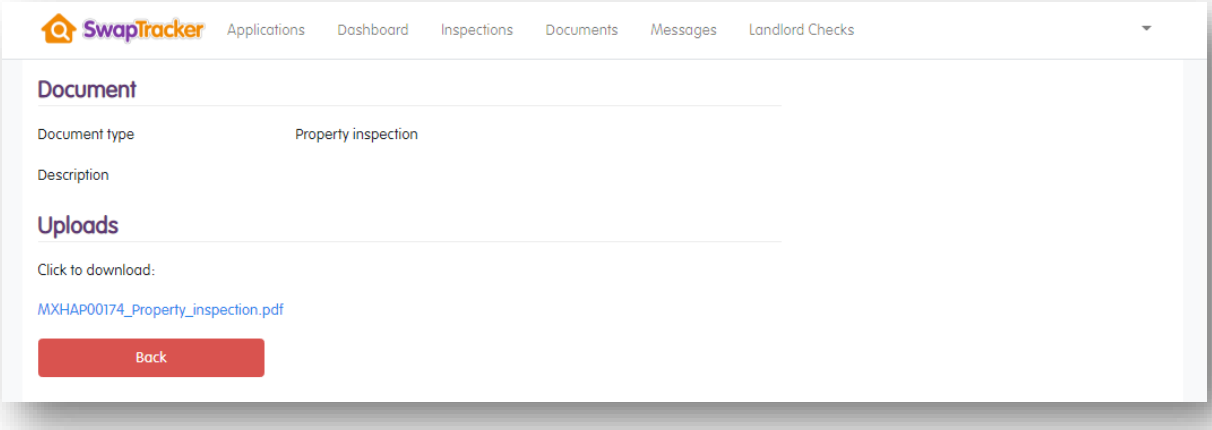
On the list of documents for an application you can see which are shared and which are not. A tick indicates the tenant will be able to see this document.



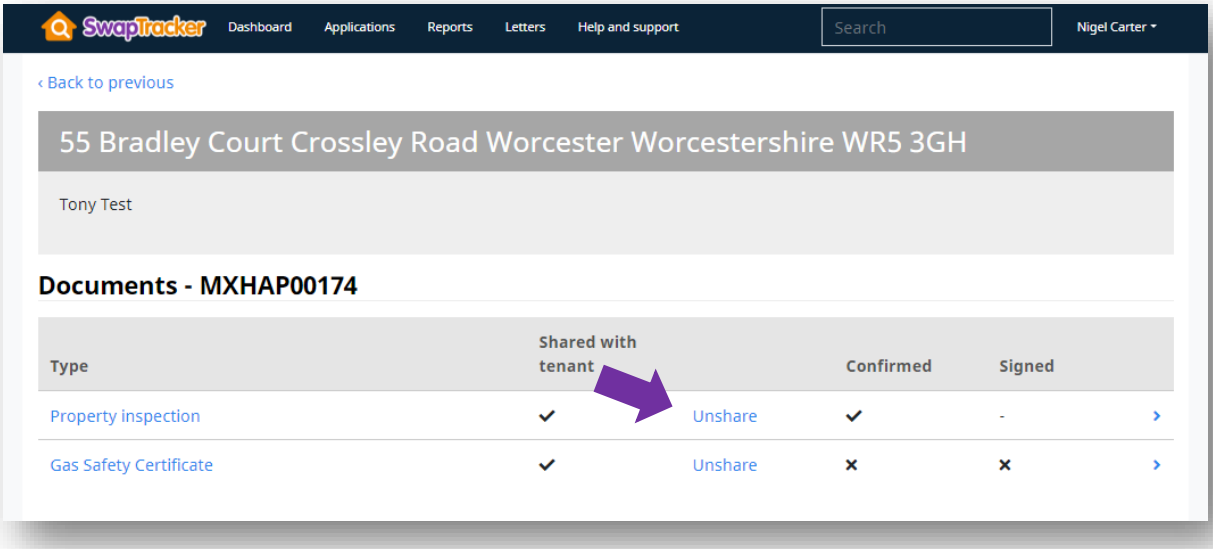
When you share a document, the tenant receives an email notifying them of this.

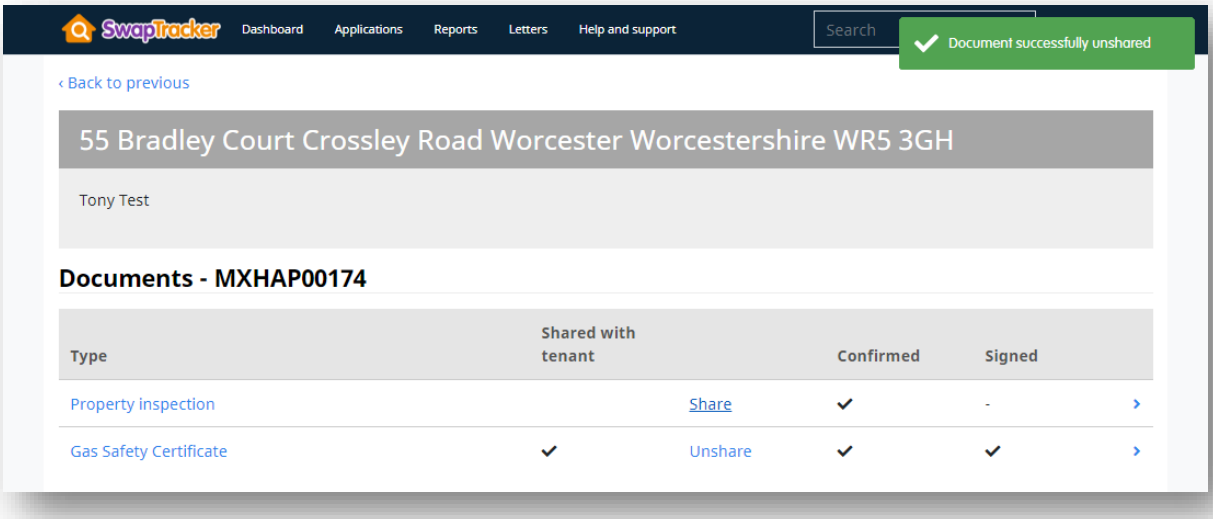
When they log into SwapTracker, they can then see details of their documents in the "*Documents*" section:





If you need to un-share a document, simply click the "*Unshare*" link next to it.





The document will then be hidden from the tenant's SwapTracker.

As with un-sharing, you can also share an existing document, by clicking the "Share" link next to it. Again, the tenant is emailed and will be able to see that document in their SwapTracker.

Note: all documents that are shared can be seen by the tenant in their "Documents" section.

For this reason, you should always be careful not share any documents that you would not want the tenant to see!

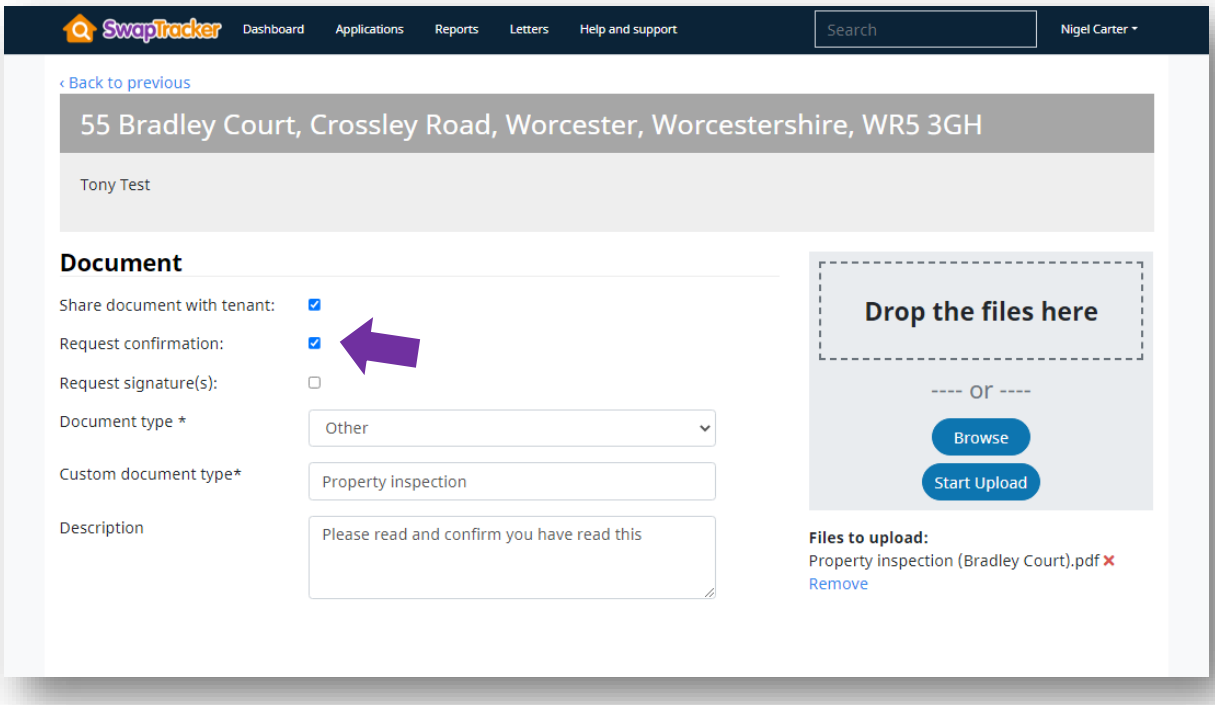
Requesting confirmation/signature from the tenant

When sharing a document with a tenant, you can also ask them to confirm they have received/read the document. You can also request they sign this confirmation too.

Requesting confirmation

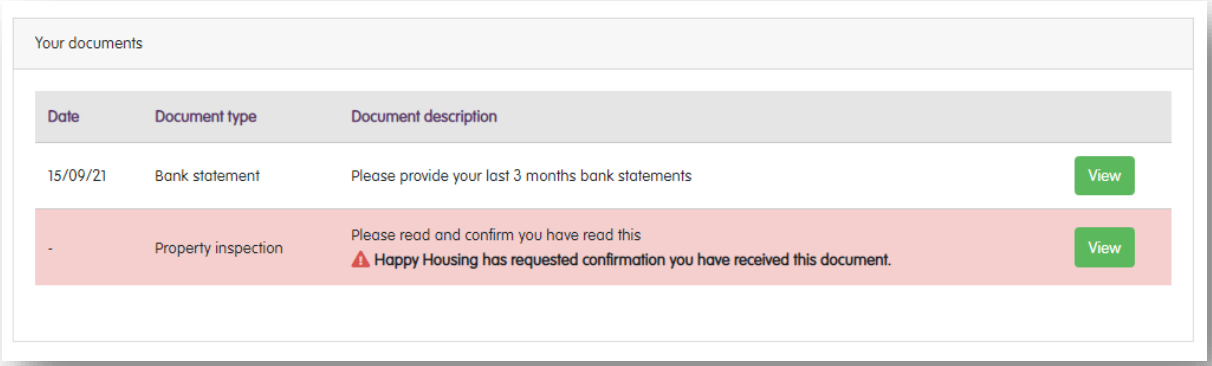
Clicking the "*Share document with tenant*" box gives you two additional options – "*Request confirmation*" and "*Request signature*".

To simply ask the tenant to confirm they have received the document tick the "*Request confirmation*" box:

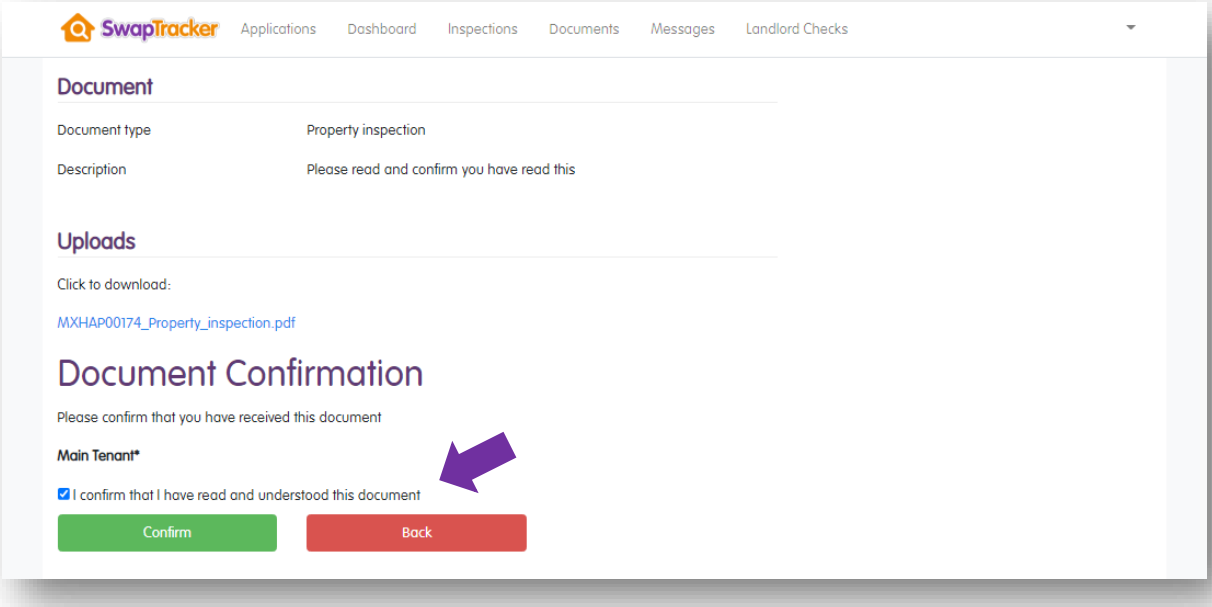


When the document is saved the tenant is emailed to inform them the document is available to view and they need to confirm they have received it.

When they log into their SwapTracker, any documents requiring confirmation are highlighted as below:



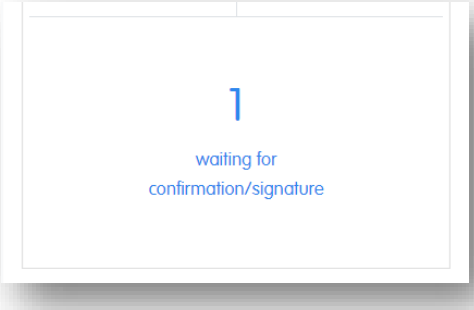
After viewing the document, the tenant must then tick the box to say they have read and understood it.



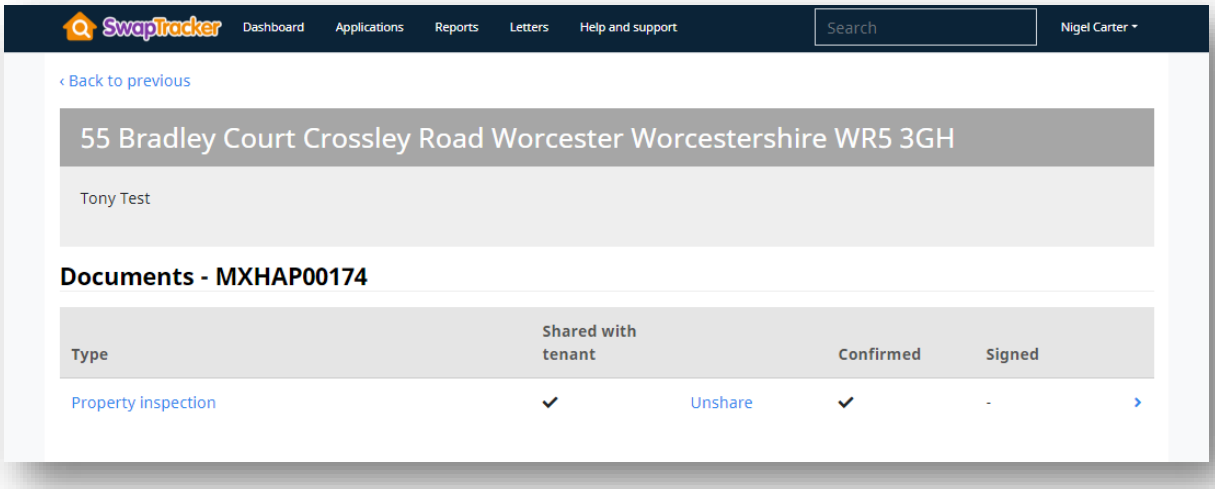
If there is a joint applicant, boxes for both main and joint applicants must be ticked.

When they click confirm, you will receive an email notifying you this has happened.

You can keep track of any documents you are waiting to be confirmed using the "*waiting for confirmation/signature*" workflow in the "*Document requests*" section on your dashboard.



Clicking the total number takes you to the list of documents:



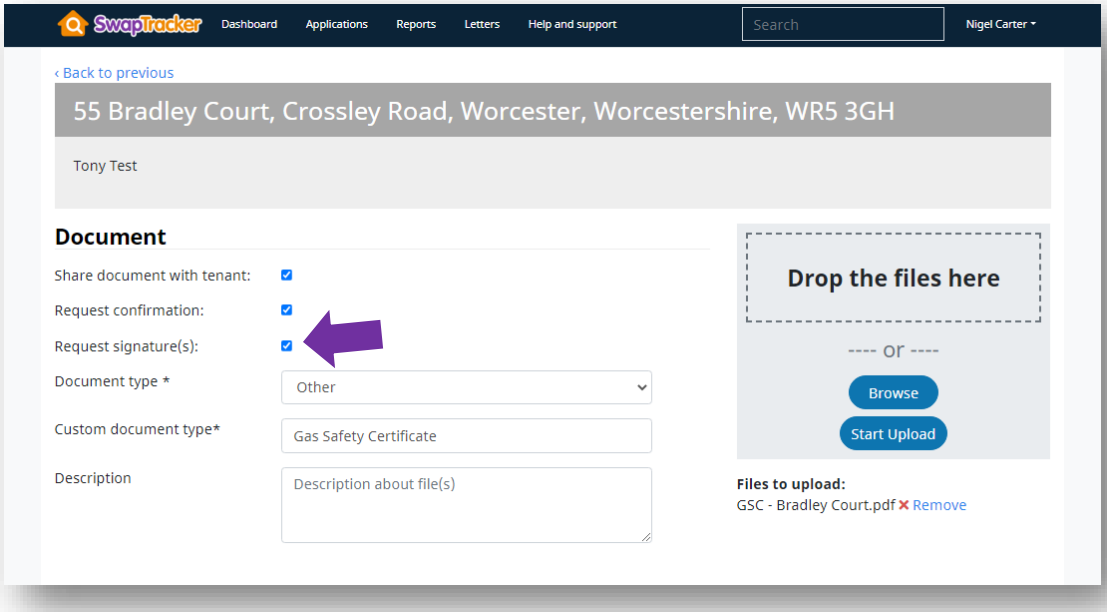
The status of each document is signified by:

- Dash – not applicable (you have not requested this)
- Cross – not done (still waiting for the tenant to confirm)
- Tick – has been done

Therefore, in the example above the tick shows that the tenant has confirmed they have received the document.

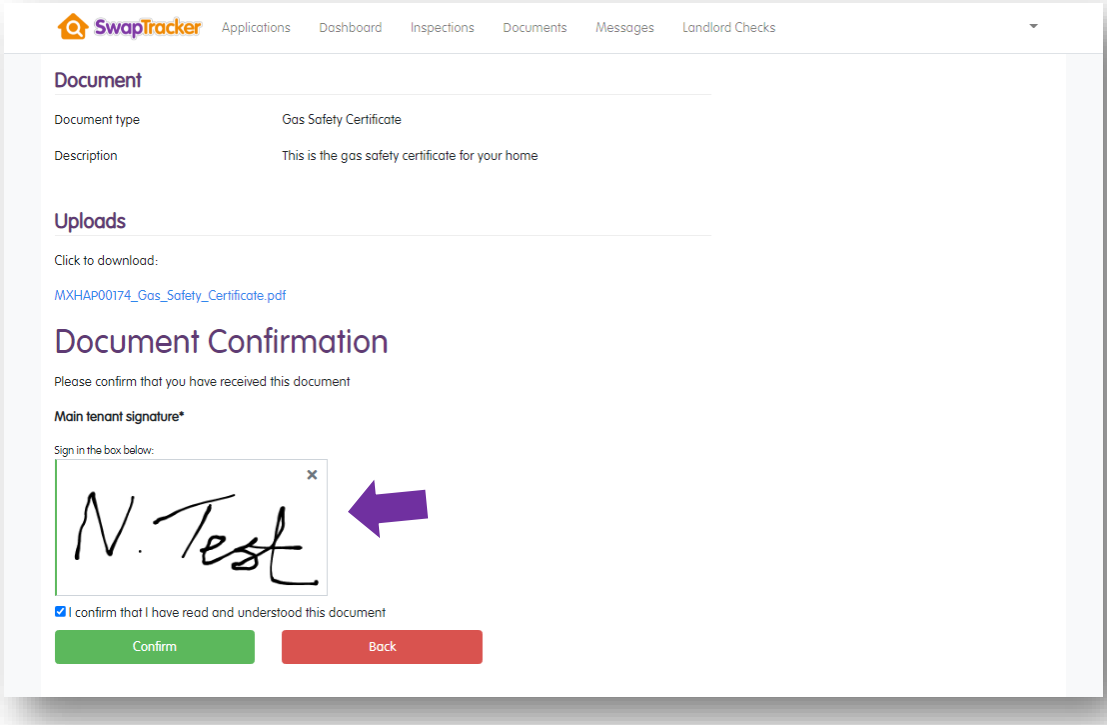
Requesting confirmation and signature

If you want the tenant to confirm receipt and provide a signature, tick the "*Request signature*" box:



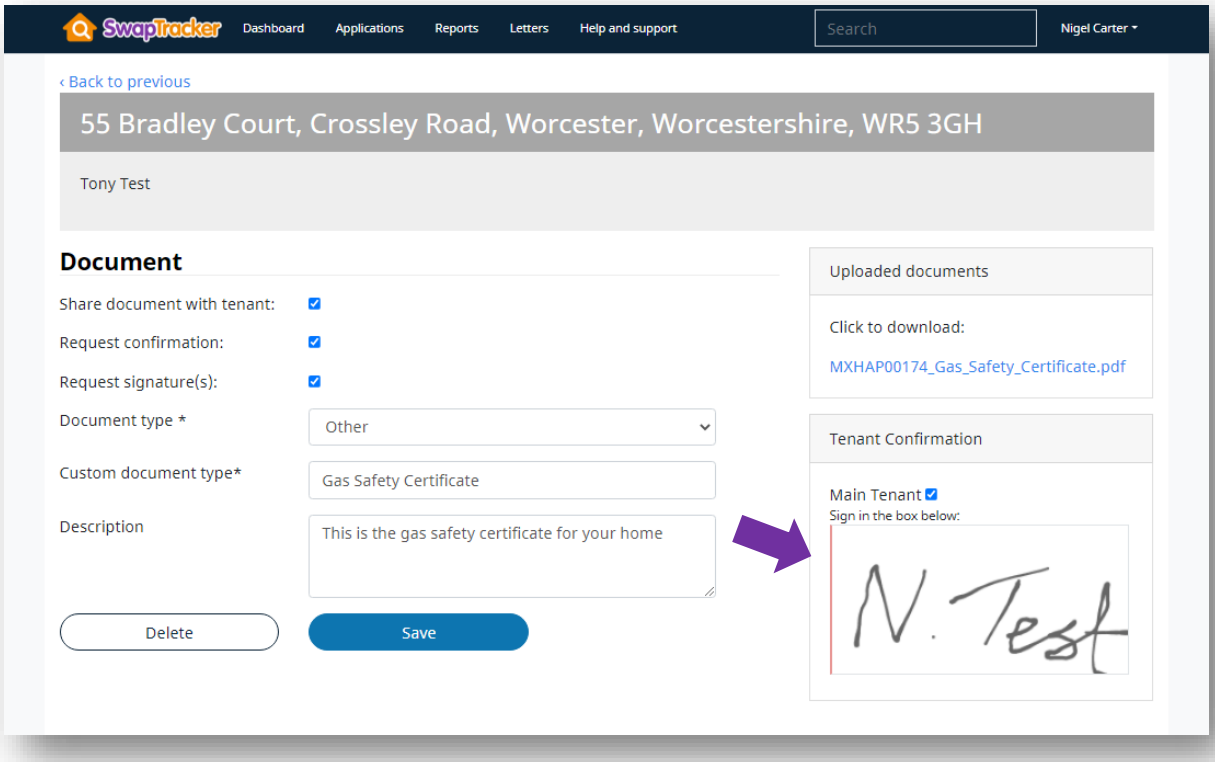
When the document is saved the tenant is emailed to inform them it is available to view and they need to confirm they have received it.

As well as ticking the box to say they have read/understood the document, they must now provide a signature also. If there is a joint applicant, they must provide a signature too:



When they click confirm, you will receive an email notifying you this has happened.

If you now view the document, you can see the signature(s) provided:

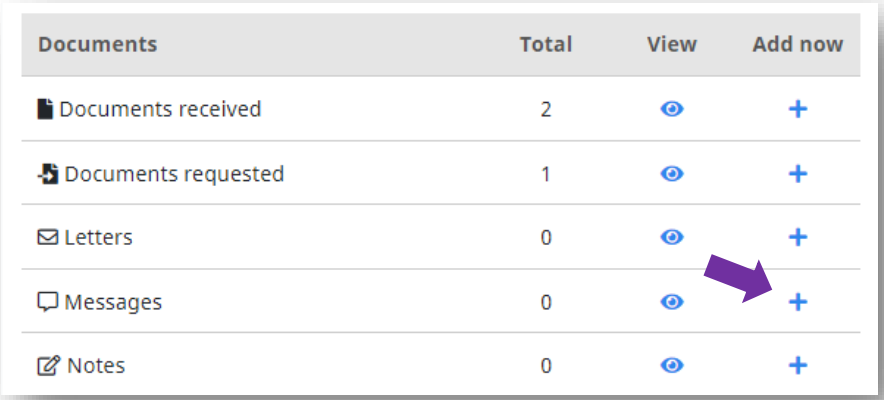


MESSAGING TENANTS

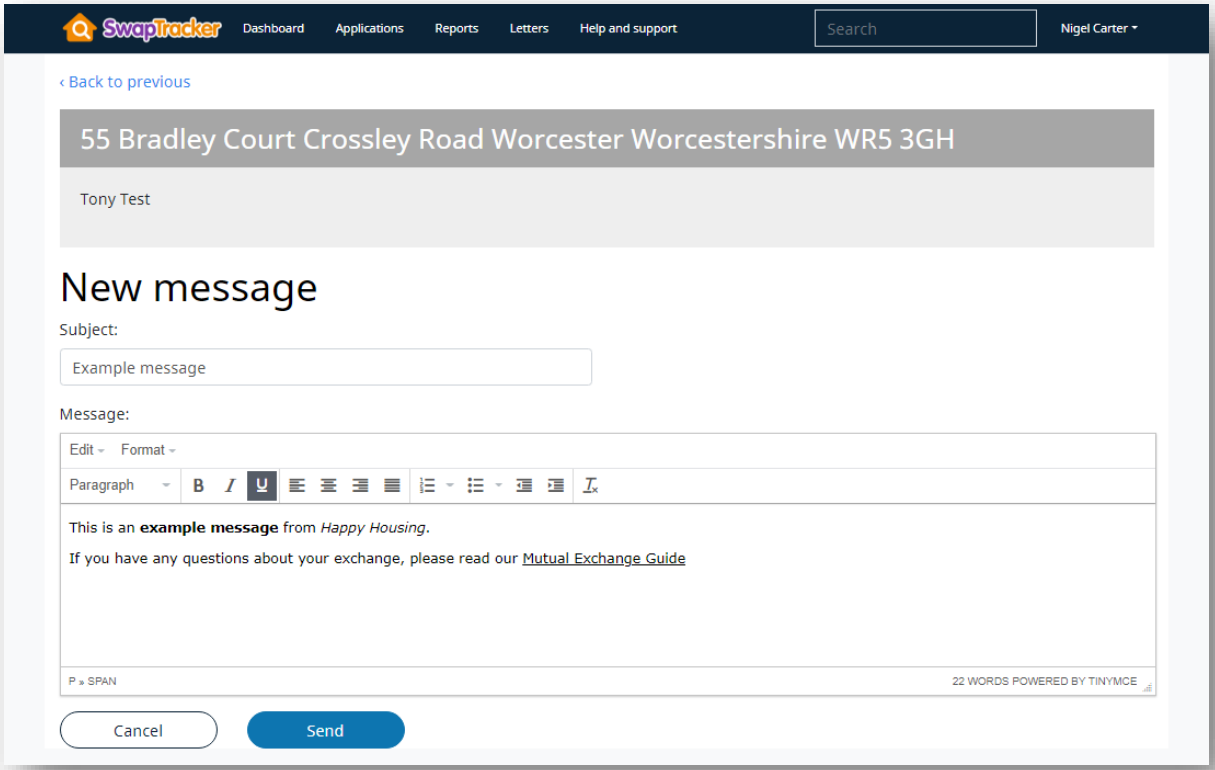
Using SwapTracker you can send a message a tenant directly. For example, if you have any ad-hoc requests or need additional information.

Messaging can be accessed via the "*Documents*" section of the Application Summary page.

To send a new message click on the "+" sign:



To send a message, you must first enter a Subject and the content of the Message:



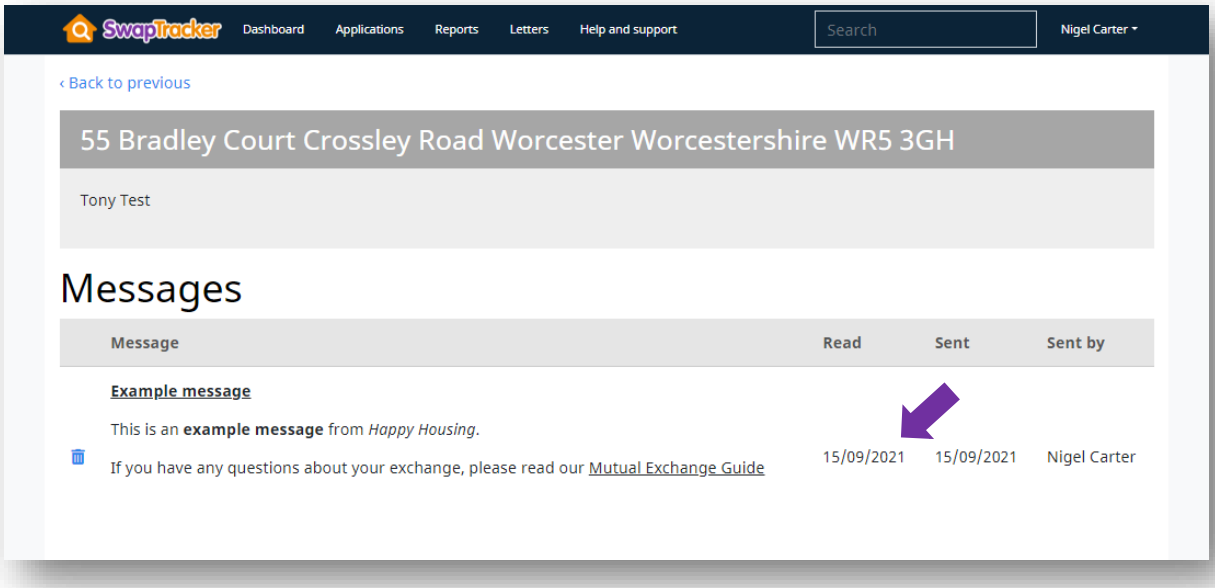
The text editor allows you format the message if required, e.g., bold, italics, underline, bullet points and add links.

When you're happy with message content click "*Send*". Otherwise, click "*Cancel*" to return to the Application Summary.

Important: you cannot change the message after you have sent it so be careful to check it thoroughly before submitting it.

When you send a message, the tenant gets an email notifying them. The email includes the subject of message but not the actual text. They must log into SwapTracker to view the whole message.

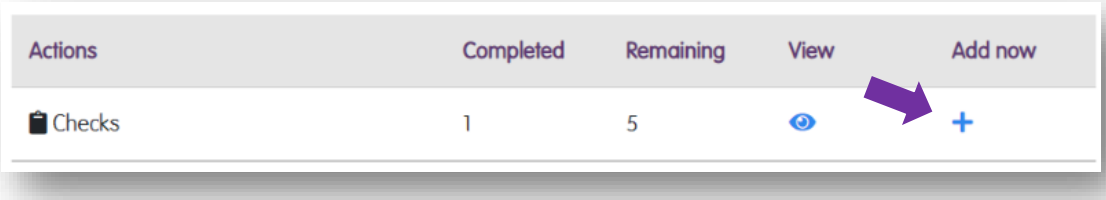
You can tell when they have read the message because the date will be displayed against it in the list of messages for that application:



Clicking the trash can icon next to a message will delete it. When this is done, the tenant will no longer be able to access/read it.

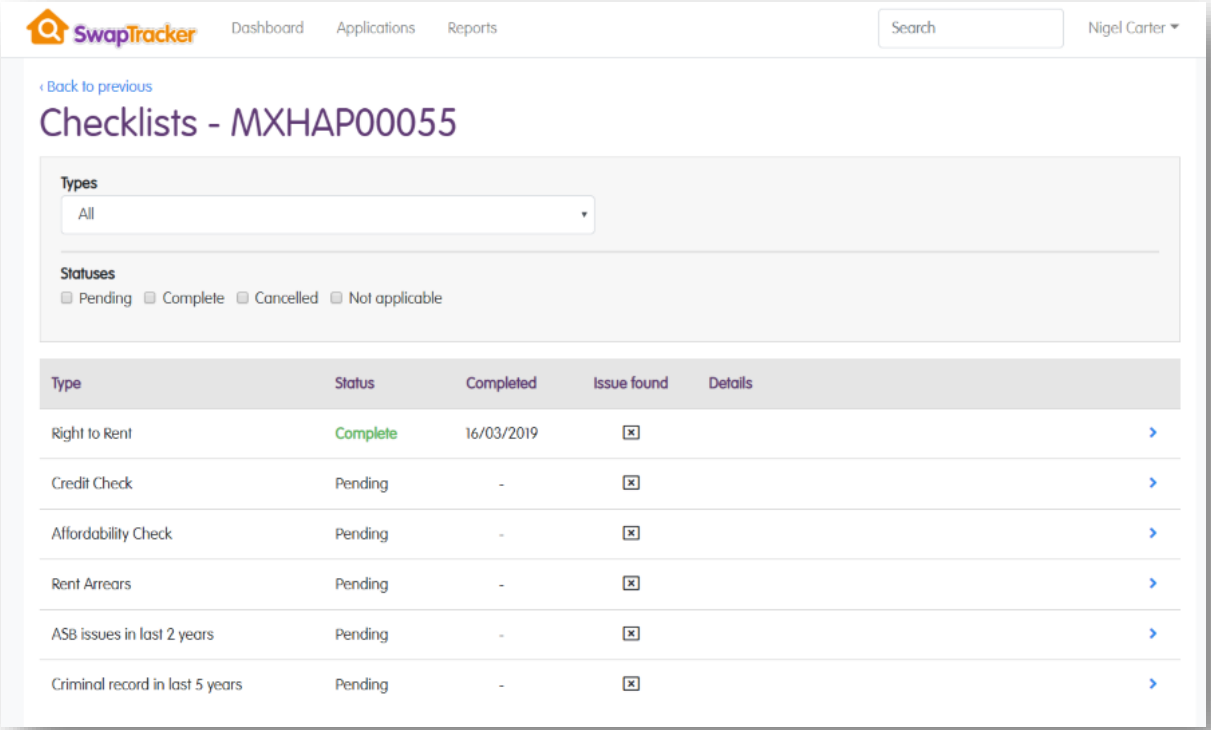
TENANT CHECKS

A list of completed and outstanding checks for an application can be accessed from the "*Actions*" section of the Application Summary.



Actions	Completed	Remaining	View	Add now
Checks	1	5		+

Default checks



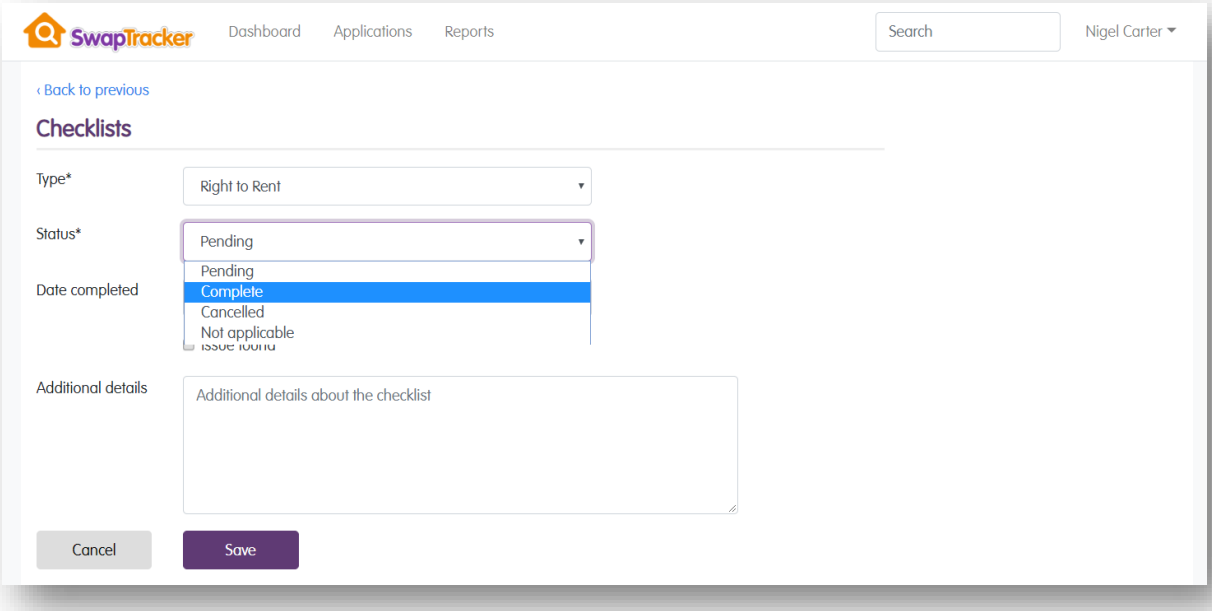
By default, when a new application is created, SwapTracker automatically creates six checks:

- Right to rent
- Credit check
- Affordability check
- Rent arrears
- ASB issues in the last 2 years
- Criminal record in last 5 years

If your organisation would like different default checks set up, please contact Housing Partners and we can configure these for you.

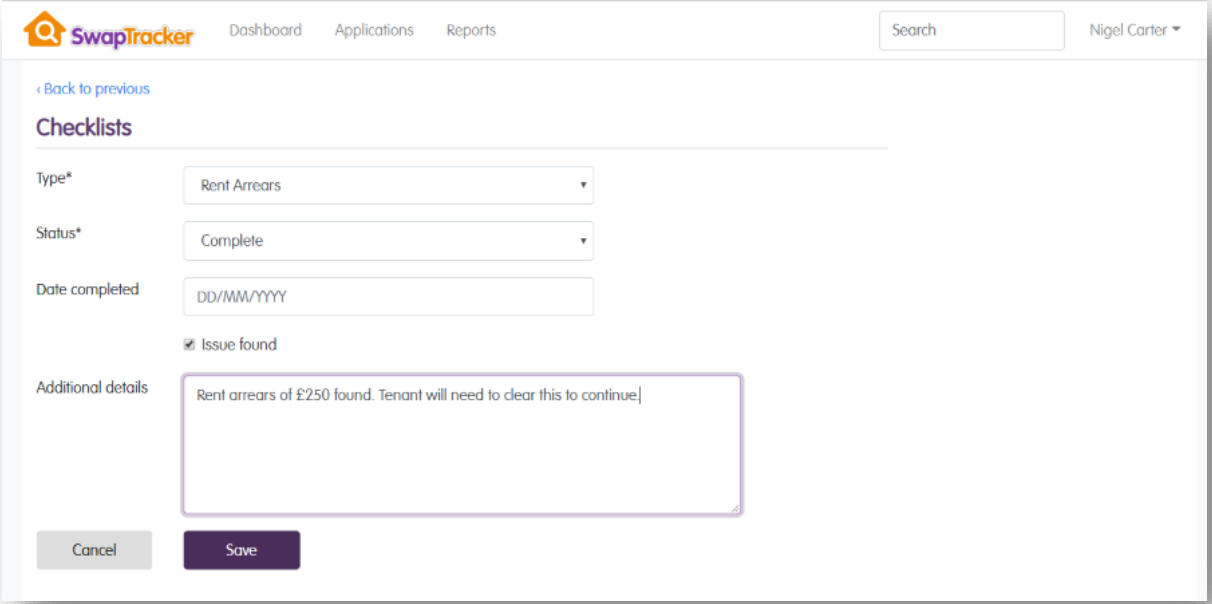
To mark a Check as "*Complete*" simply select this status from the list and click "*Save*".

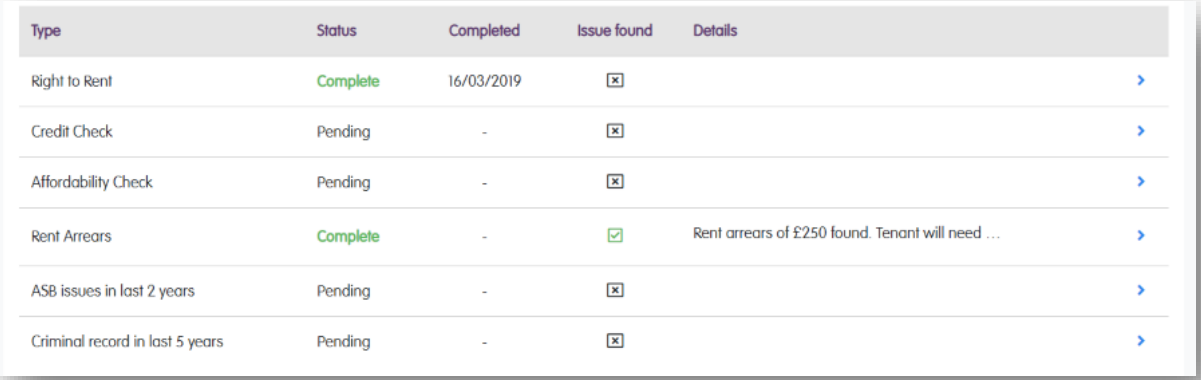
If you need to add any additional supporting information you can enter this in the "*Additional details*" box (optional).



For your own records, you can also save the date the check was completed. However, this is optional.

In the event of any issues with a check, you should tick the "*Issue found*" box and add any supporting information in the "*Additional details*" box.





Type	Status	Completed	Issue found	Details
Right to Rent	Complete	16/03/2019	☒	
Credit Check	Pending	-	☒	
Affordability Check	Pending	-	☒	
Rent Arrears	Complete	-	☑	Rent arrears of £250 found. Tenant will need …
ASB issues in last 2 years	Pending	-	☒	
Criminal record in last 5 years	Pending	-	☒	

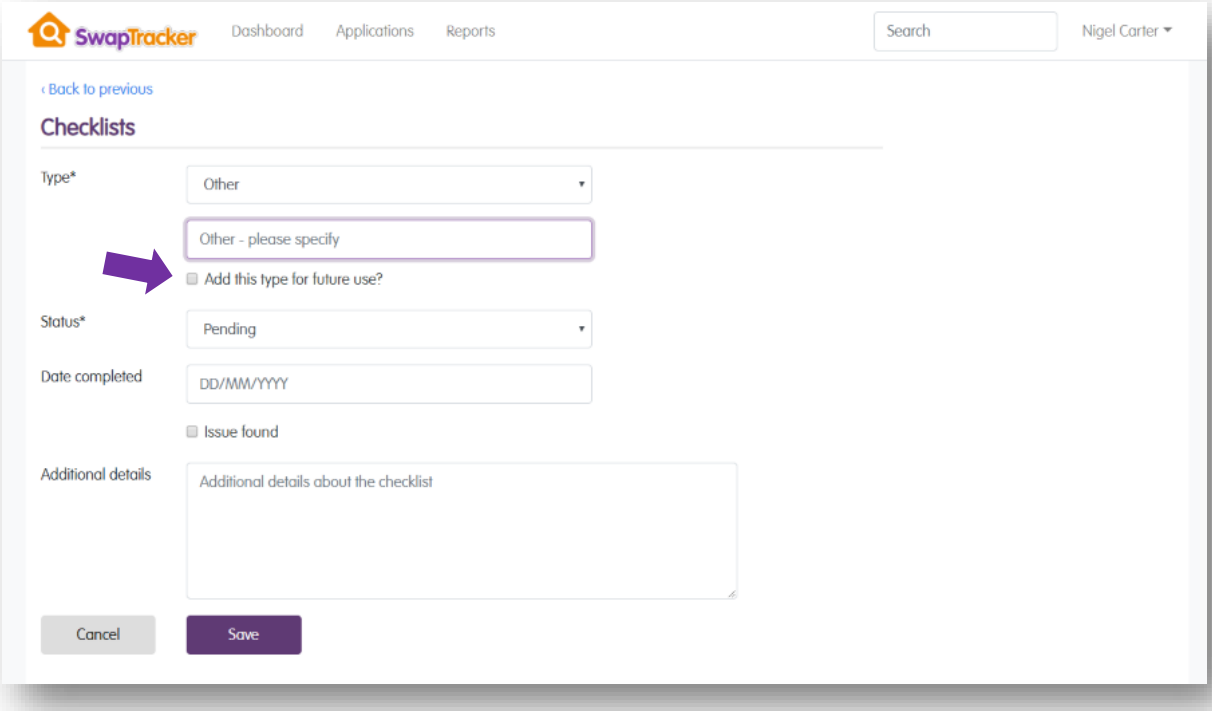
Adding new Checks

As well as the six default check types, you can also add your own checks for an application.

This is done by selecting a type from the standard list.

If you need to add a **new check type** not in the list, select "*Other*" and enter the new type in the text box that is revealed.

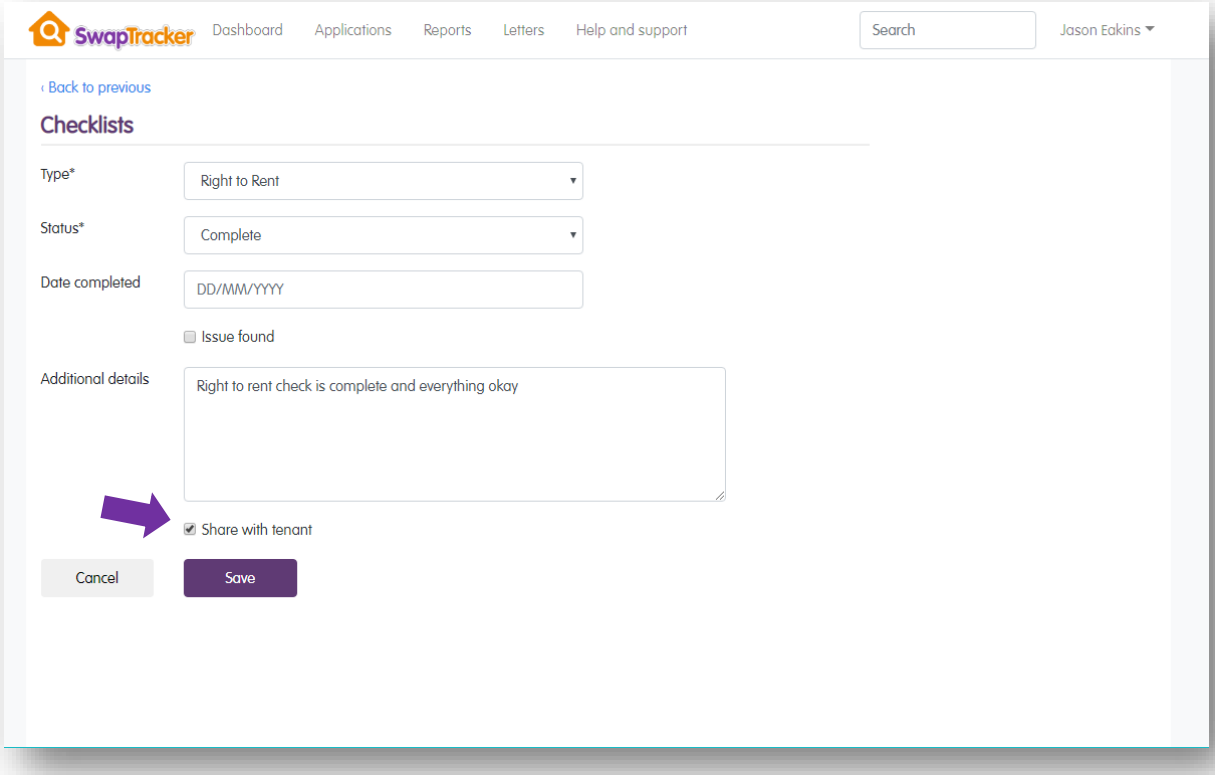
If this is a check type you will be using often, tick the "*Add this type for future use?*" box and the new type will be permanently saved to the list of standard check types for your organisation, i.e. next time you want to add a check of the same type it will already be in your list.



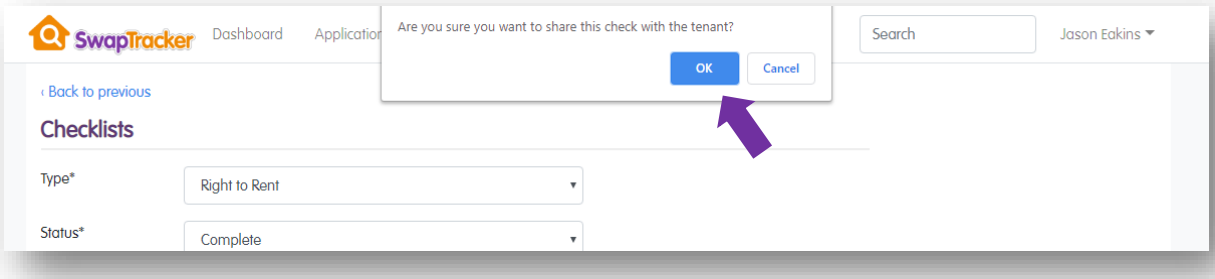
Sharing checks with tenants

If you want to provide more transparency and keep the tenant up to date, you can also choose to "share" the checks you are performing and their outcomes.

To share a check with a tenant simply tick the "Share with tenant" box:



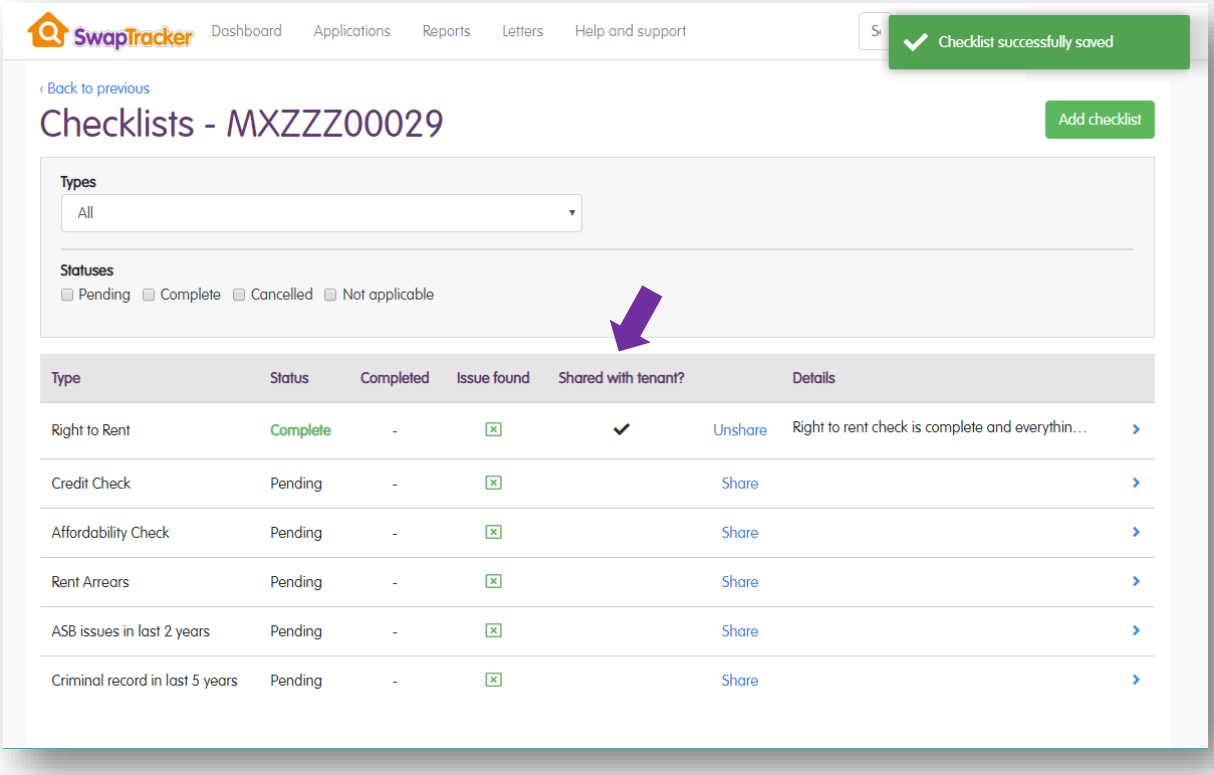
When you click "Save" you will then be asked to confirm you wish to share it:



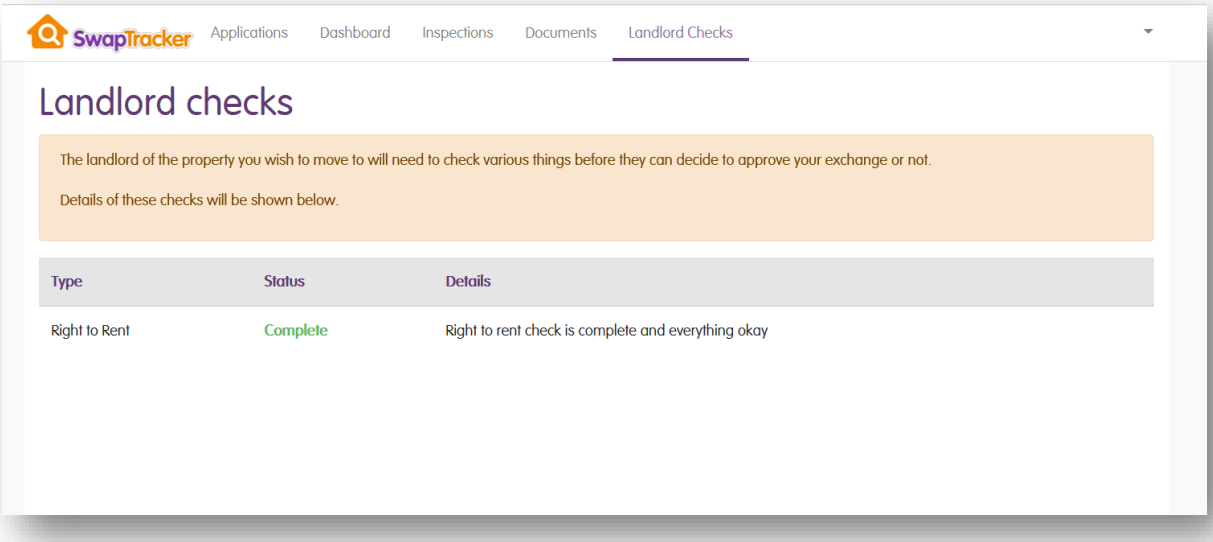
Sharing checks allows the tenant to see them on their SwapTracker.

Note: by default, checks are NOT shared with tenants.

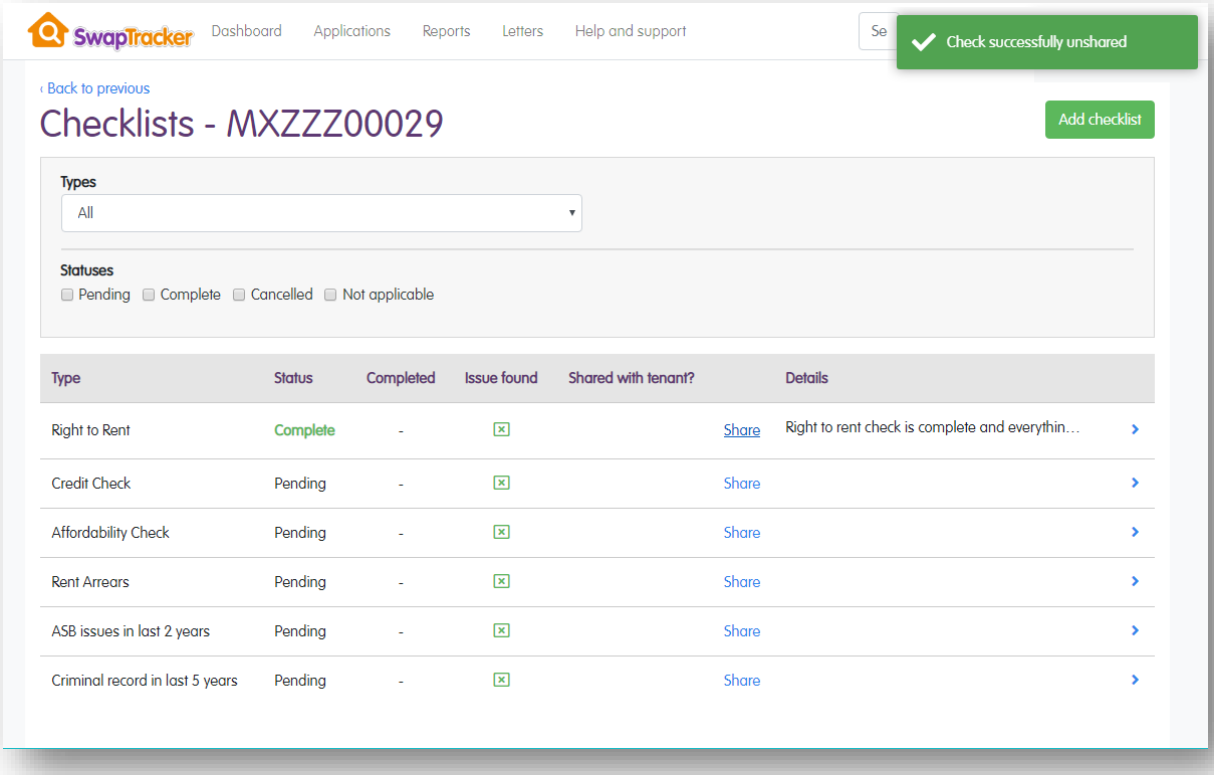
On the list of checks for an application you can see which are shared and which are not.



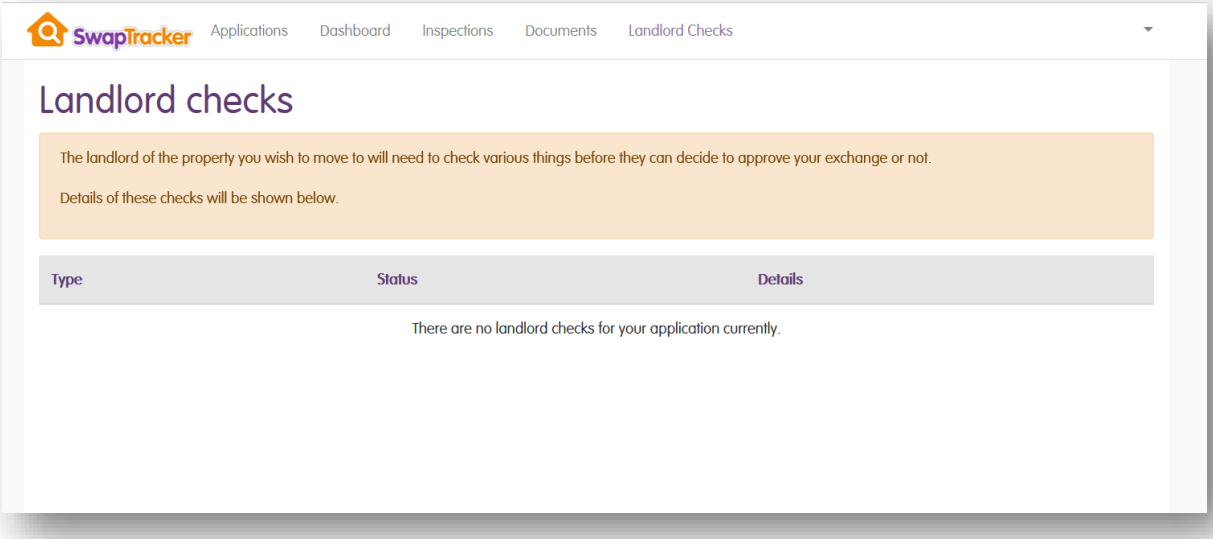
When you do share a check, the tenant receives an email notifying them of this. When they log into SwapTracker, they can then see details of their checks in the "Landlord Checks" section:



If you need to un-share a check, simply click the "Unshare" link next to it.

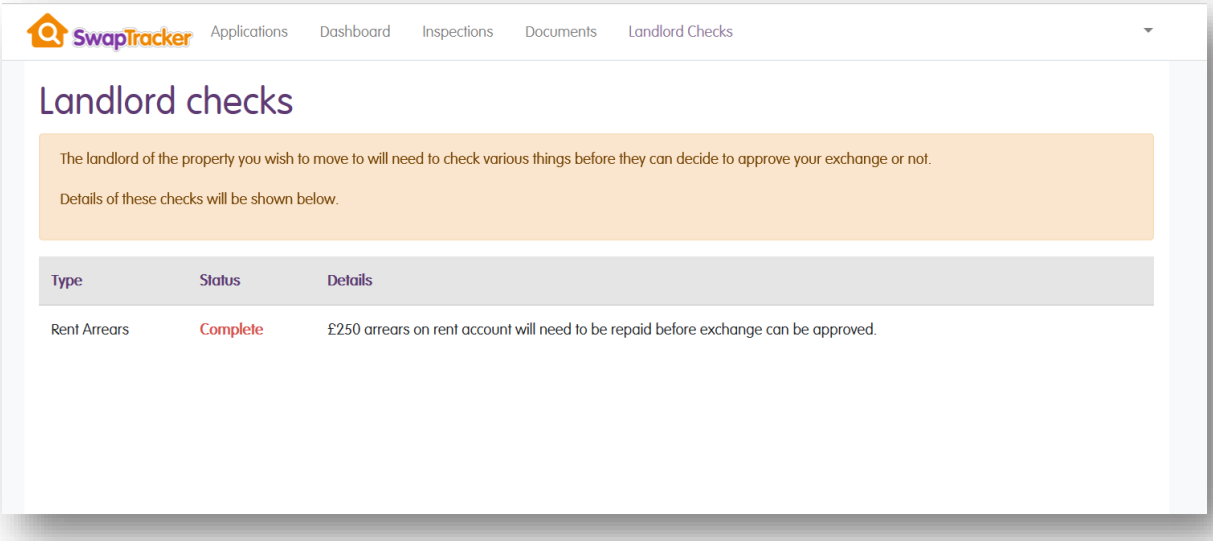


The check will then be hidden from the tenant's SwapTracker.



As with un-sharing, you can also share an existing check, by clicking the "Share" link next to it. Again, the tenant is emailed and will be able to see that check in their SwapTracker.

Note: all checks that are shared can be seen by the tenant in the their "Landlord Checks" section, including any additional information you may have entered.

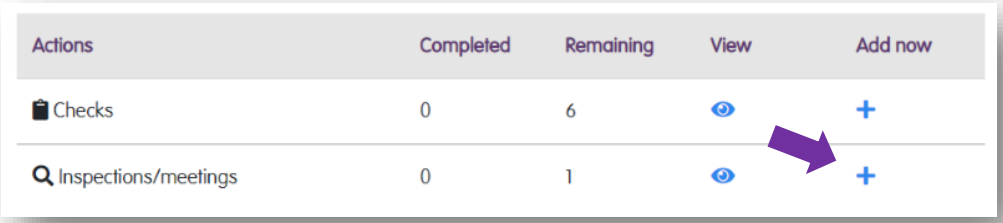


For this reason, you should always be careful not share any checks you would not want the tenant to see!

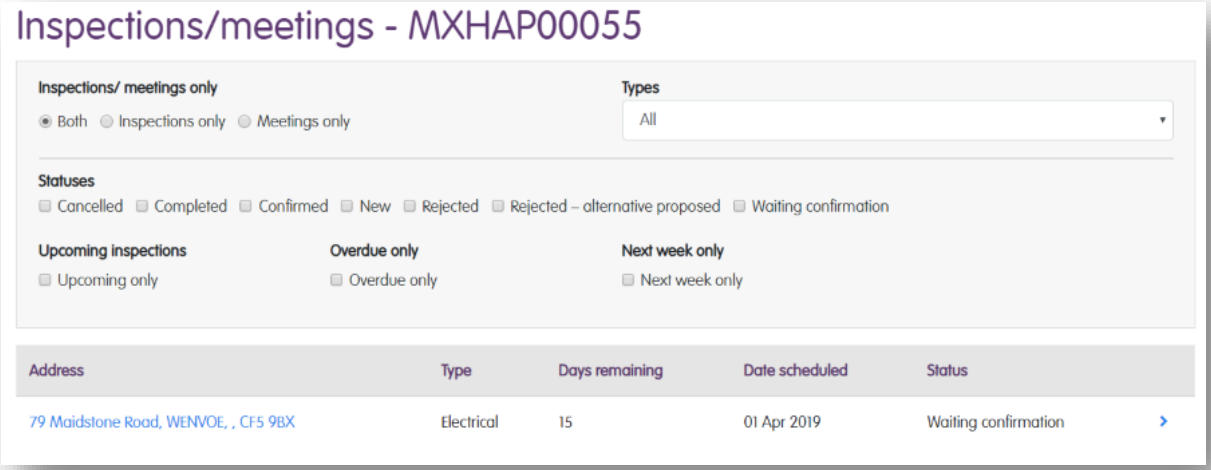
INSPECTIONS & MEETINGS (APPOINTMENTS)

Scheduling appointments

Inspections/meetings related to an application can be viewed and added from the "*Actions*" section of the Application Summary page.

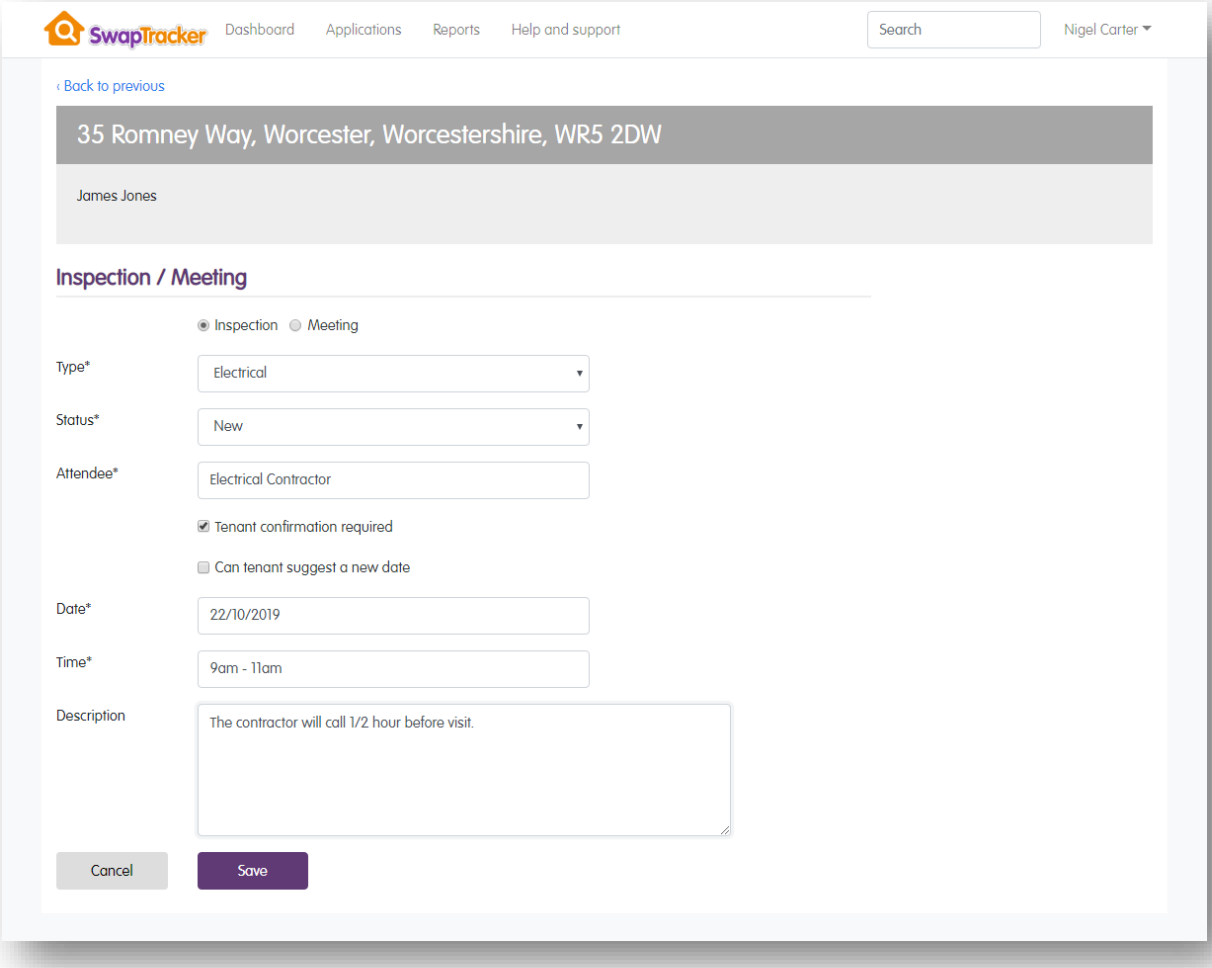


The list of appointments can also be filtered by type, status and time period.



When adding a new appointment, you can enter the following information:

- Is it an inspection or a meeting?
- The type of appointment, e.g. property inspection
- The status (the default is "New")
- The "attendee" – a text description of who will be attending
- Tenant confirmation required? – see description below
- Date – the date of the appointment
- Time – this is a text field not a specific time, e.g. "Between 9am and 11am"
- Description – an optional description of the appointment. This can be seen by your tenant and is useful for entering any additional information they may find helpful.



Appointments will appear on your SwapTracker dashboard when they are coming up (the date is in the next 7 days) and overdue (the date is in the past and they have not been set to "Complete").

Tenant Confirmation

When adding an appointment, you can allow the tenant to confirm the date and time.

This is done by ticking the "*Tenant confirmation required?*" box.

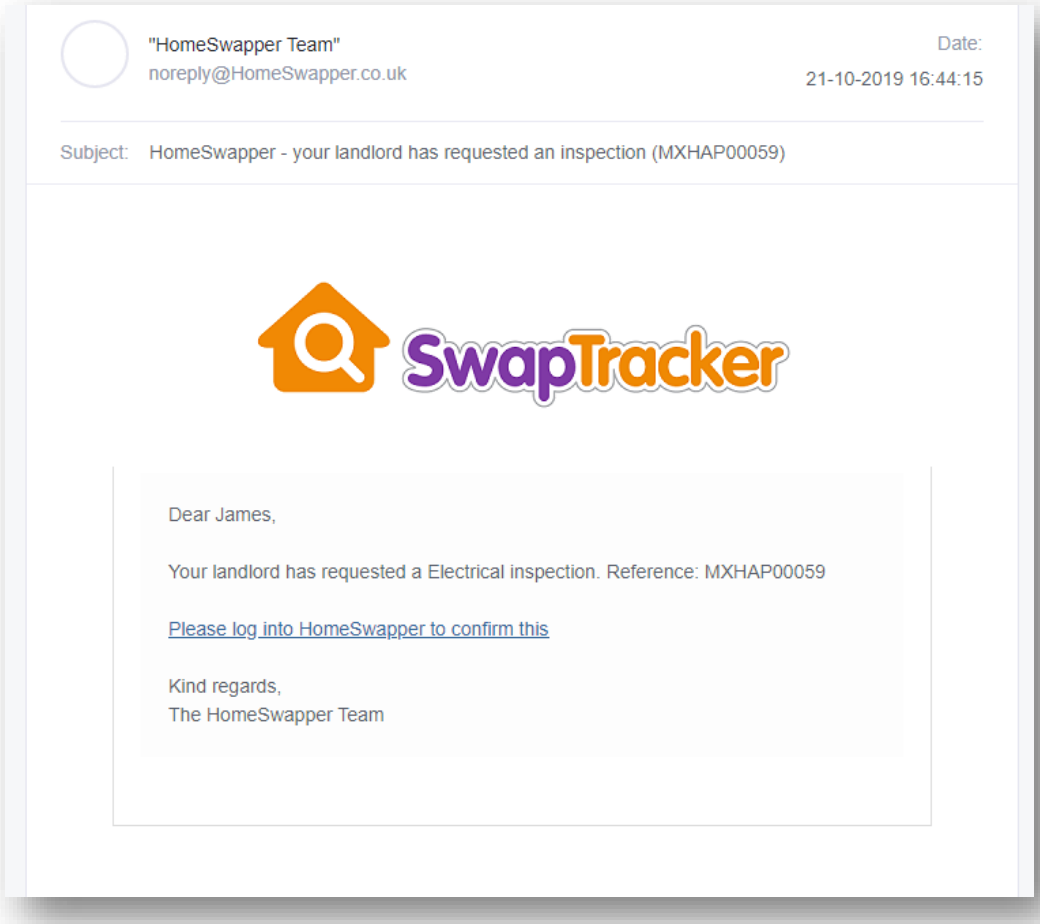
If this is ticked the tenant will be sent an email with the details of the inspection/meeting and a notification will be displayed on their SwapTracker dashboard.

The status of the appointment will be set to "*Waiting confirmation*".

If you are happy with them suggesting another date, tick the "*Can tenant suggest a new date*" box also.

If you do NOT want them to suggest an alternative date, they will only be able to confirm it (this is the default setting!).

An email is sent to the tenant notifying them that they need to confirm the appointment:


"HomeSwapper Team"
noreply@HomeSwapper.co.uk

Date:
21-10-2019 16:44:15

Subject: HomeSwapper - your landlord has requested an inspection (MXHAP00059)

SwapTracker

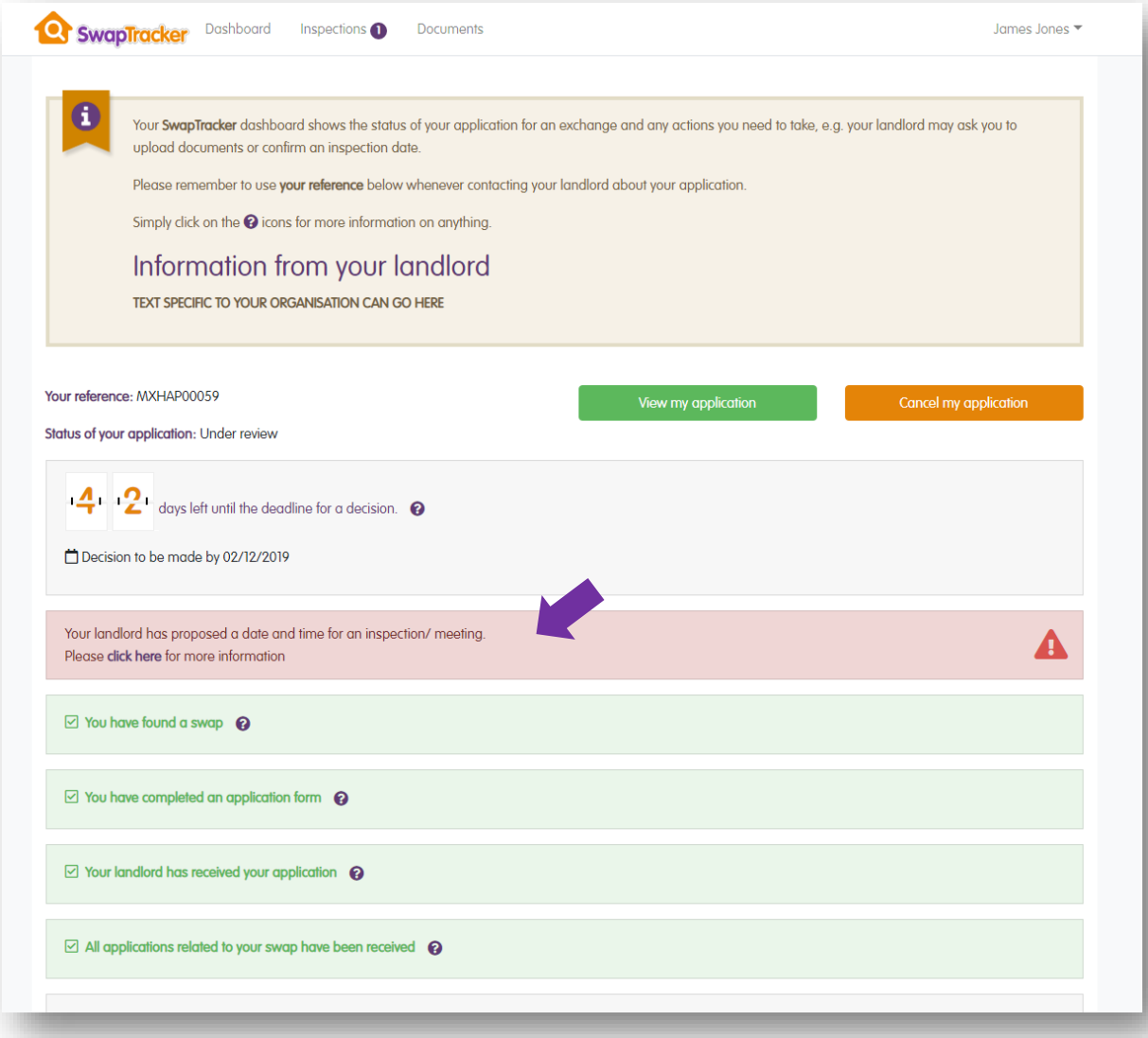
Dear James,

Your landlord has requested a Electrical inspection. Reference: MXHAP00059

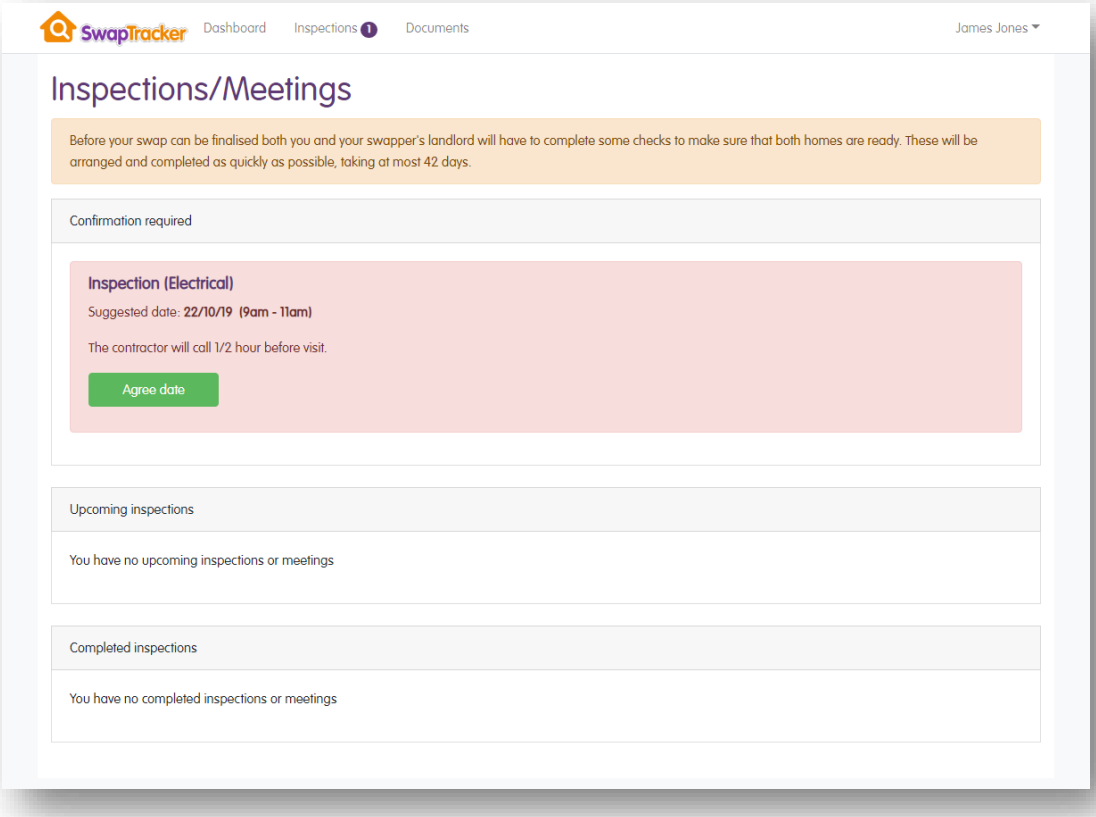
Please log into HomeSwapper to confirm this

Kind regards,
The HomeSwapper Team

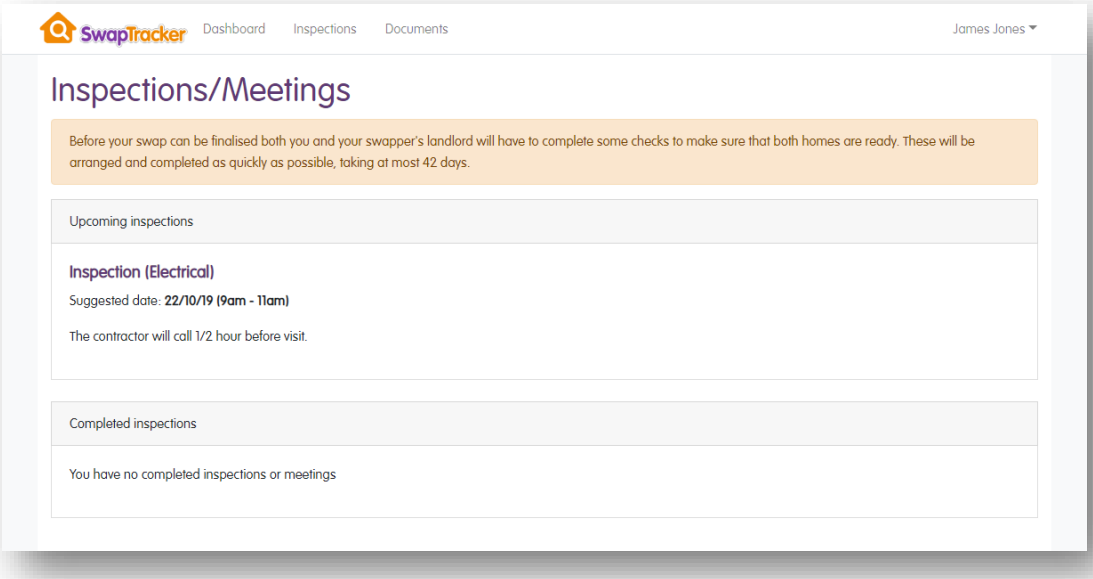
When they log into SwapTracker, there is also a notification on their dashboard:



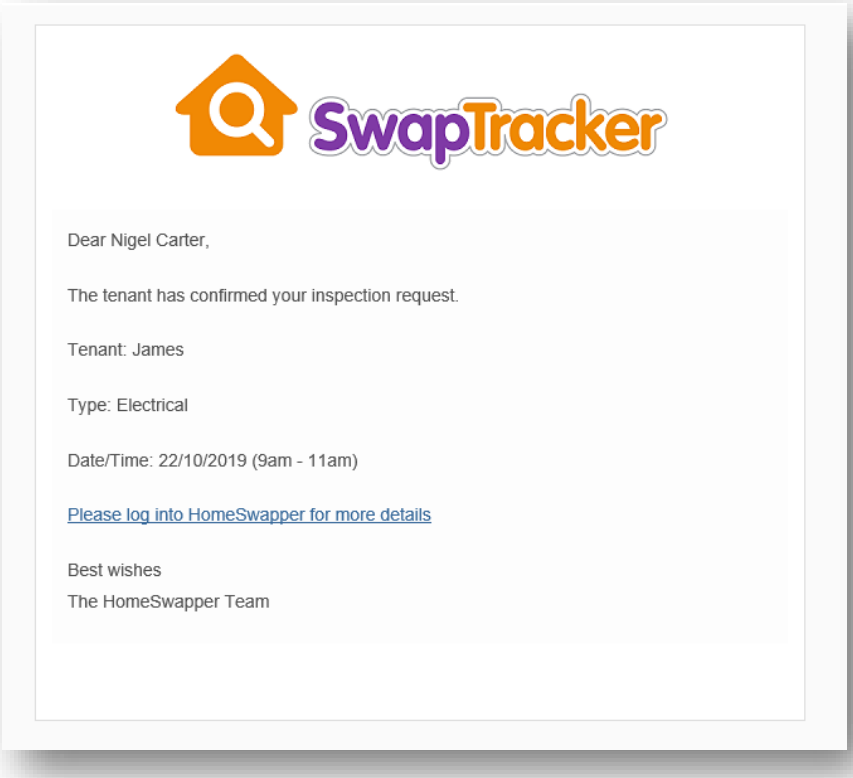
Clicking the notification (or "Inspections" tab in the top menu) shows them details of appointment they need to confirm:



When the tenant clicks on "*Agree date*", the status of the appointment is set to "*Confirmed*".



You will also receive an email notifying you of this:



SwapTracker

Dear Nigel Carter,

The tenant has confirmed your inspection request.

Tenant: James

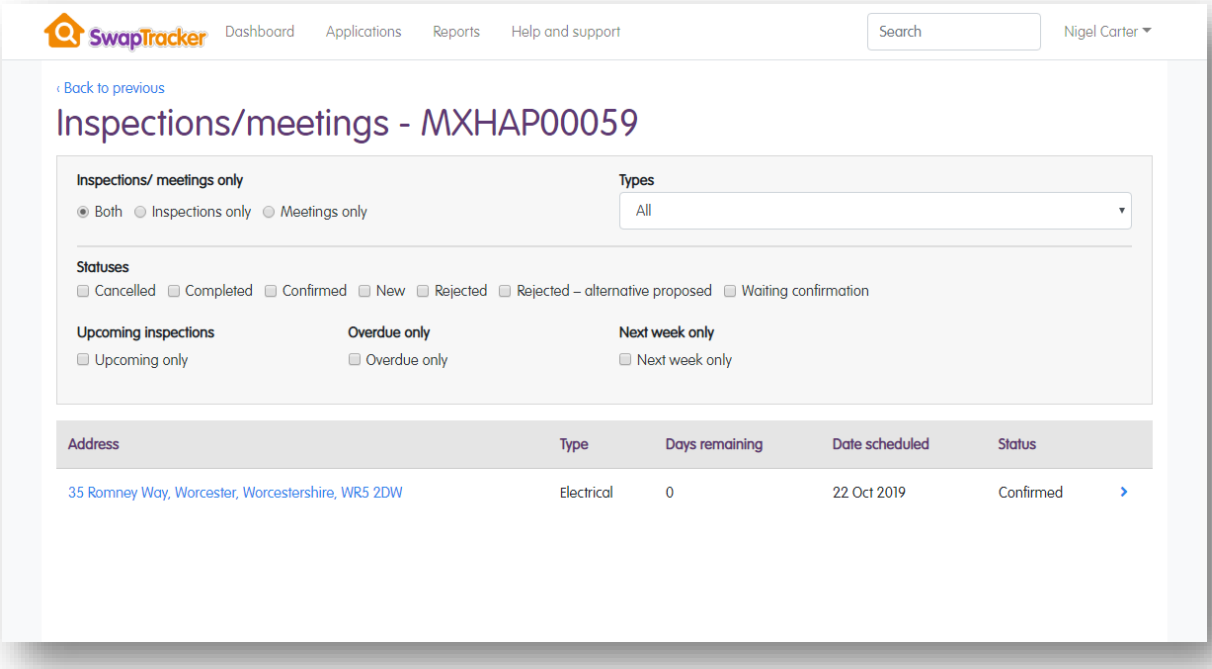
Type: Electrical

Date/Time: 22/10/2019 (9am - 11am)

Please log into HomeSwapper for more details

Best wishes
The HomeSwapper Team

The appointment is shown as "*Confirmed*" in the list of inspections/meetings for that application:



SwapTracker Dashboard Applications Reports Help and support Search Nigel Carter

‹ Back to previous

Inspections/meetings - MXHAP00059

Inspections/ meetings only: Both | Inspections only | Meetings only

Types: All

Statuses: Cancelled | Completed | Confirmed | New | Rejected | Rejected – alternative proposed | Waiting confirmation

Upcoming inspections: Upcoming only

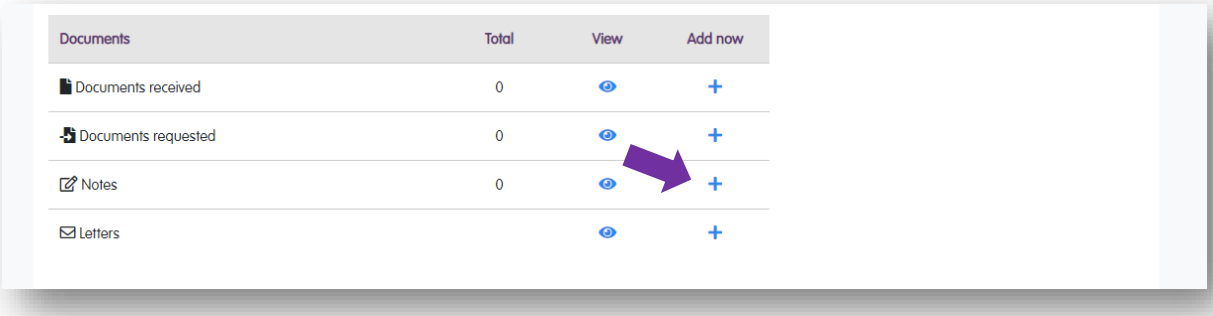
Overdue only: Overdue only

Next week only: Next week only

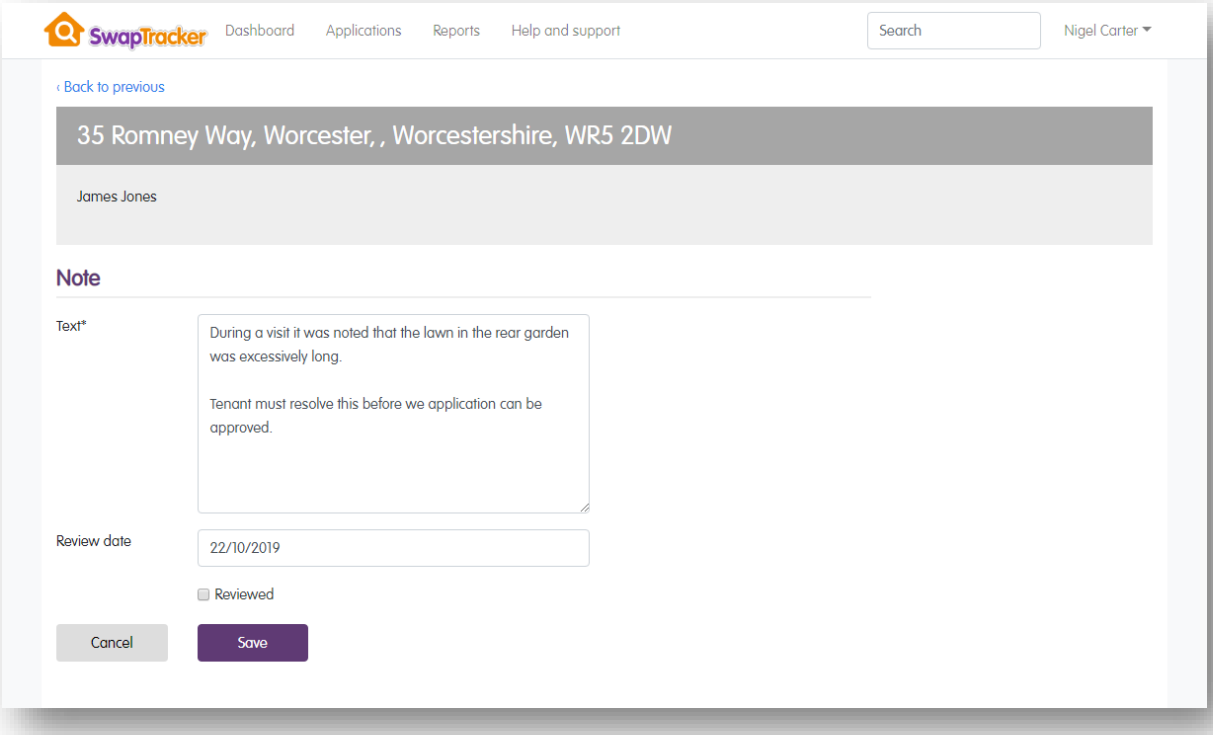
Address	Type	Days remaining	Date scheduled	Status
35 Romney Way, Worcester, Worcestershire, WR5 2DW	Electrical	0	22 Oct 2019	Confirmed

NOTES

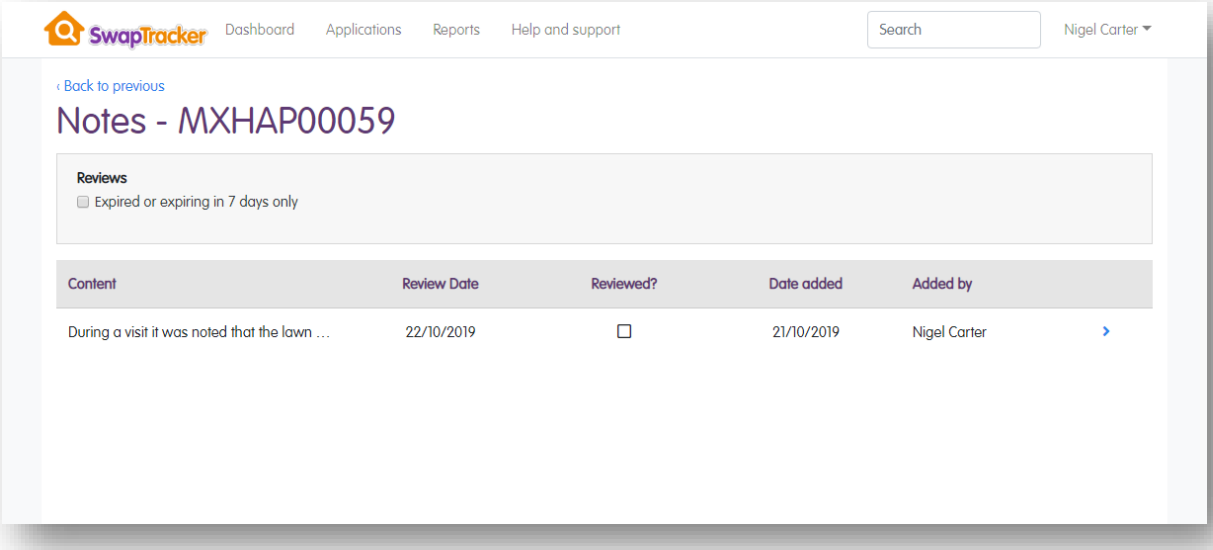
Ad-hoc notes can be added against an application.



Simply add a text note and an optional review date (see Notes for review)



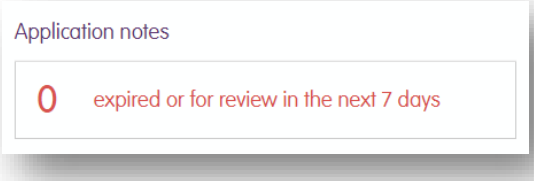
Important – Tenants **cannot** see any Notes you have added against their application. These cannot be "shared".



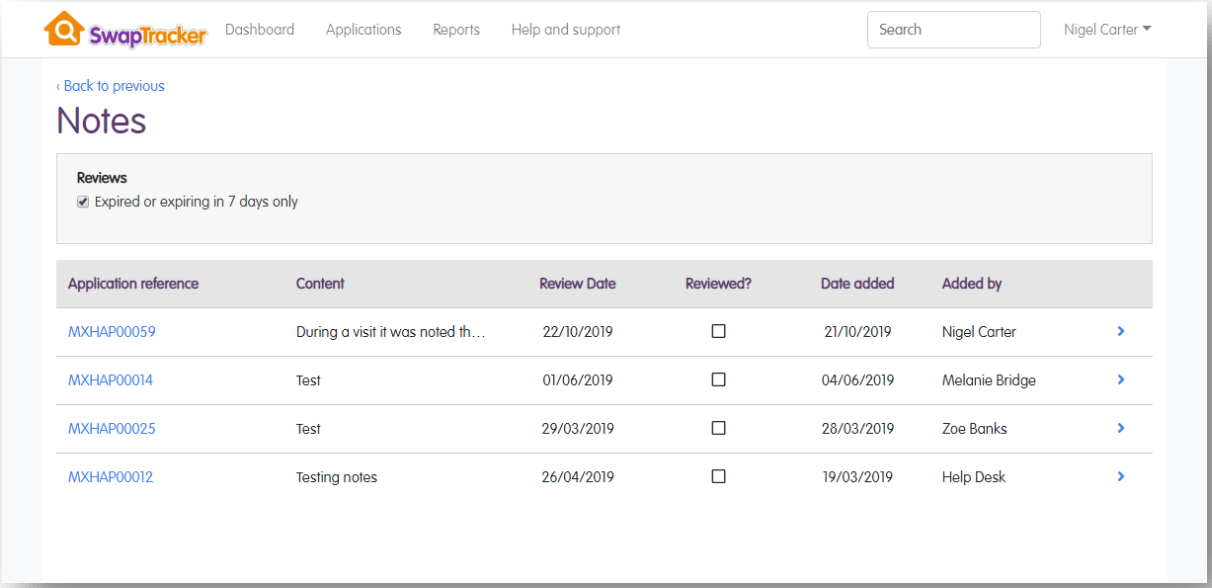
Notes for review

When adding a note, you can set an optional review date. Use this where you need a reminder.

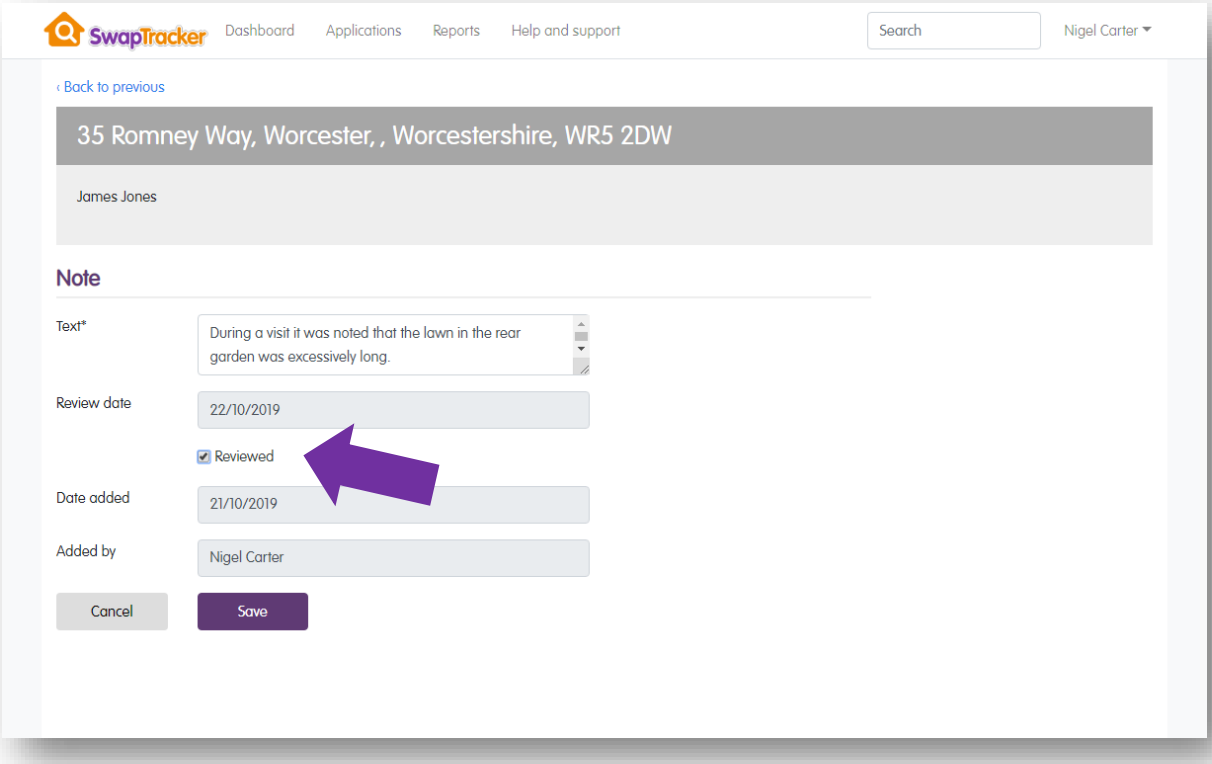
Any notes with a review date in the next 7 days will be highlighted on your SwapTracker dashboard.



Clicking this total will take you to a list of all notes that have expired or will do in the next 7 days:



To mark a note as reviewed, simply tick the "*Reviewed*" box and save it. It will no longer appear on your Dashboard workflow.



TENANT REFERENCES

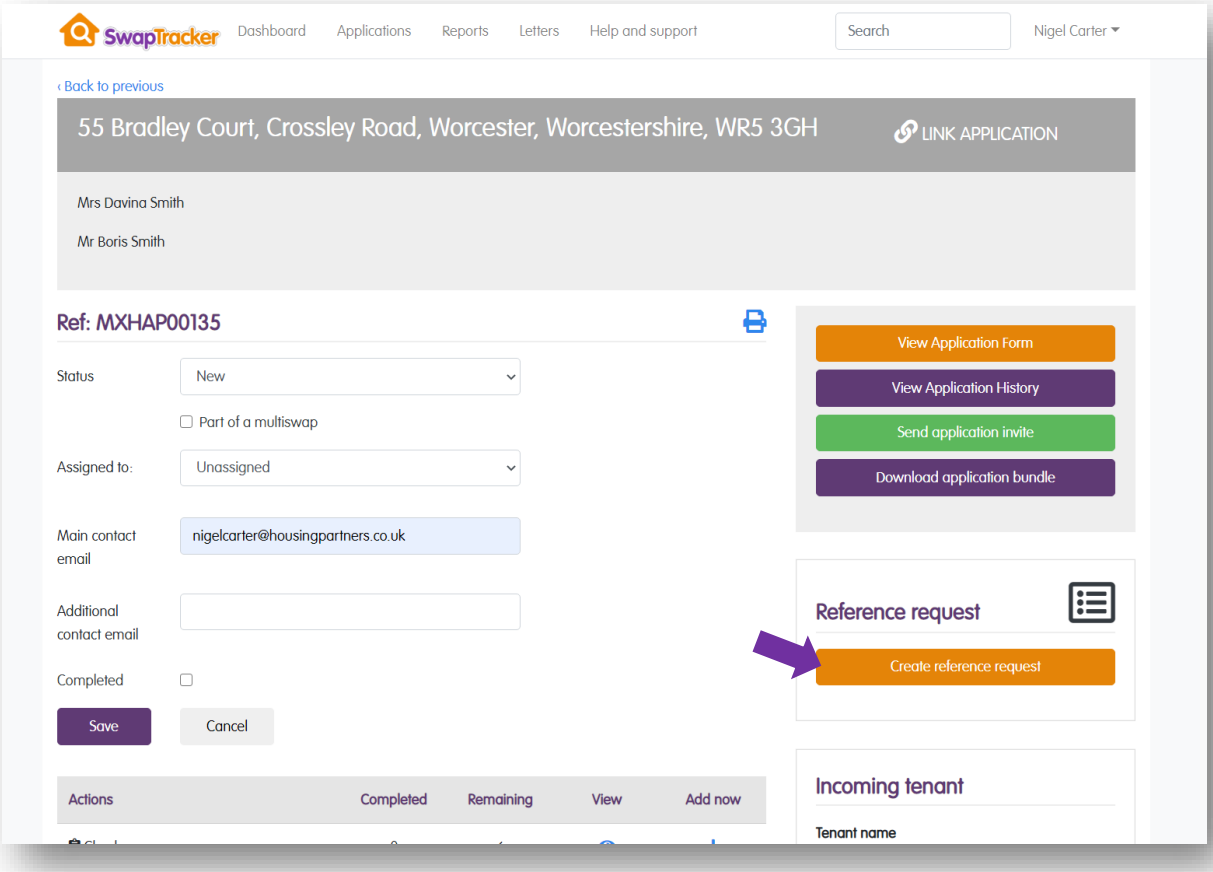
Using SwapTracker, you can request a reference for a potential new tenant.

You can request a reference from any landlord you have contact details for. They do not have to be currently using SwapTracker.

Requesting a reference

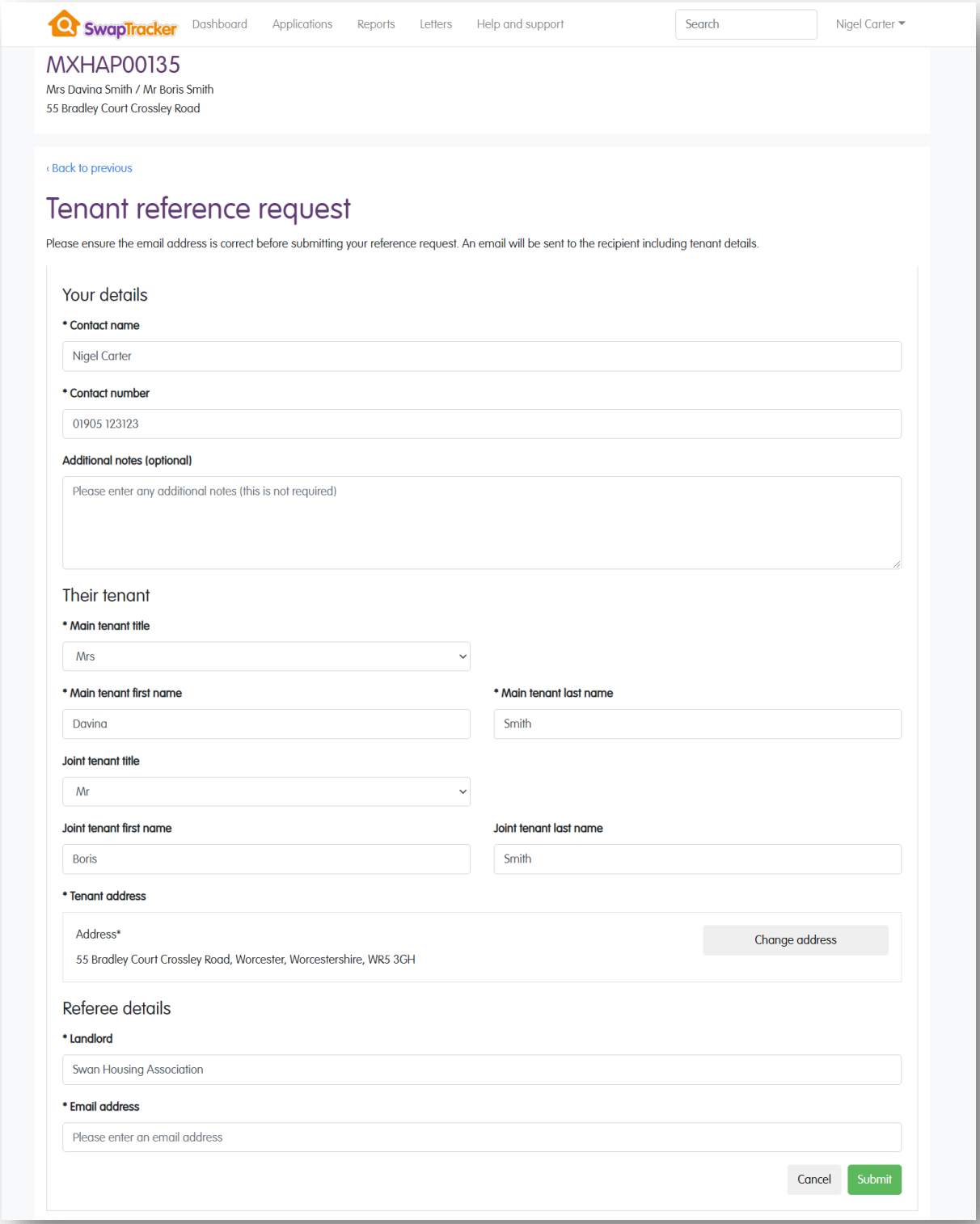
To request a reference, click on the "*Create reference request*" button in the "*Reference request*" panel.

Note: if both applicants involved in the exchange are your existing tenants, no references are required and the "*Reference request*" panel will not be shown.



Important – Tenants **cannot** see any references against their application. These cannot be "shared".

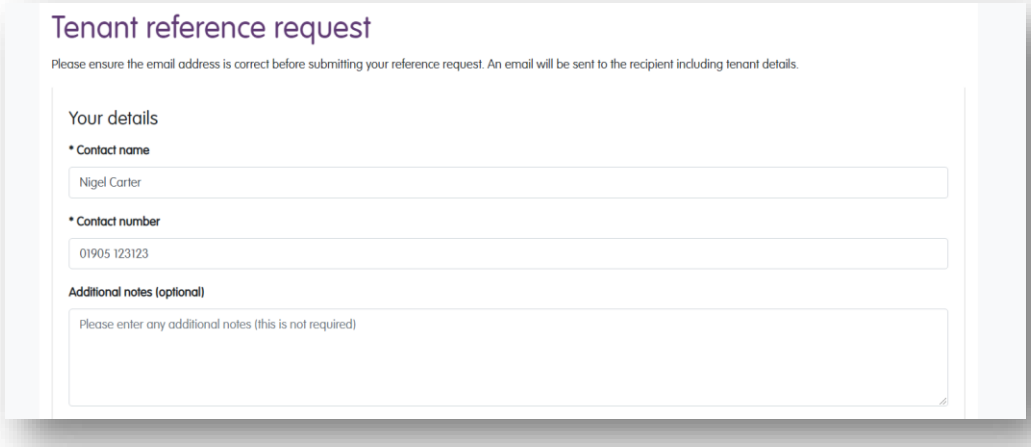
After clicking the "*Create reference request*" button, you are taken to the Tenant reference request form.



Your details

The first part of the request form is where you enter your contact information in case the other landlord needs to get in touch. This is automatically populated from your login details but can be overwritten if you wish.

You can also enter any additional notes if there is anything specific you want the other landlord to know or provide. This is optional.

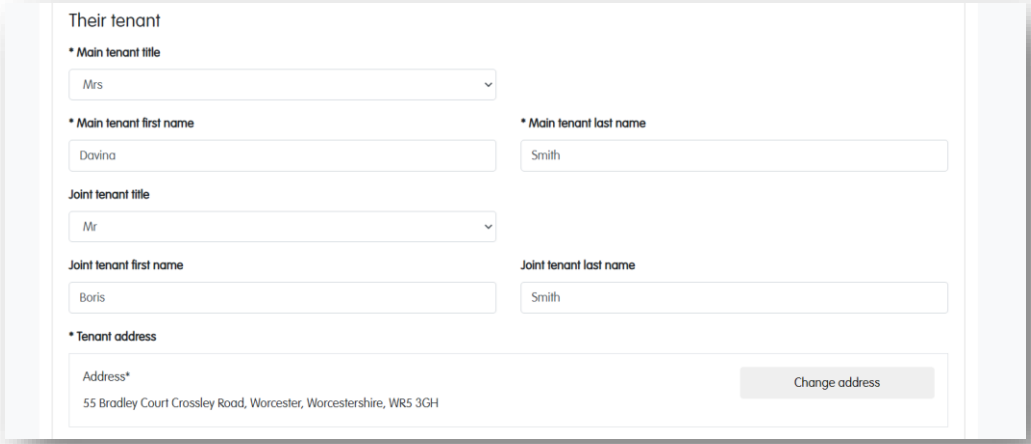


Their tenant

The second part of the request form is for details of the person(s) you require a reference for.

This is automatically populated from their MX application form but can be overwritten if you wish.

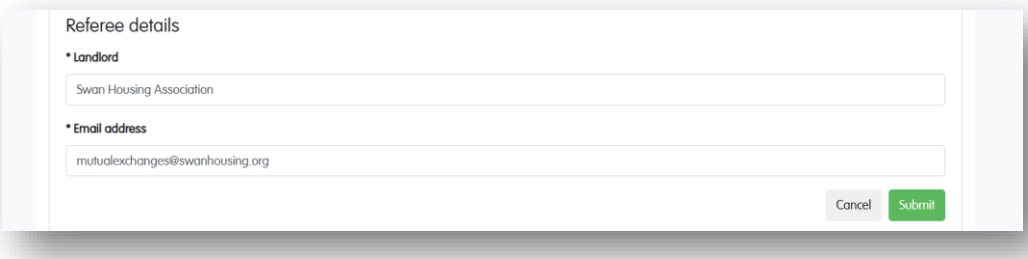
SwapTracker checks the application form and if the person applying is not your tenant, their details are used (from the "*Your details*" section). If the person they are swapping with is not your tenant, their details are used instead (from the "*Their details*" section).



Referee details

Finally, you need to enter the landlord name and the email address you want the reference request to be sent to.

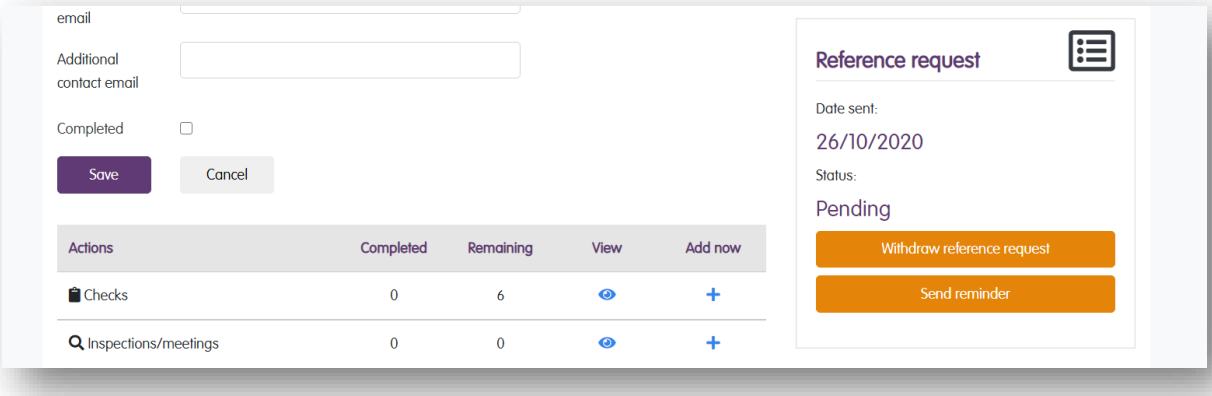
The landlord name is pre-populated from the details the tenant provided in the MX application form. However, you can change this is you wish.

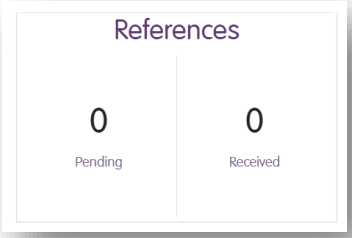


When you are happy with the request form, click "*Submit*" to send the reference request to the landlord.

Otherwise, click "*Cancel*" and no reference will be requested.

When a request is submitted, the "*Reference request*" panel will now show the date it was sent and a status of "*Pending*" (i.e. you're now waiting for the landlord to complete it).

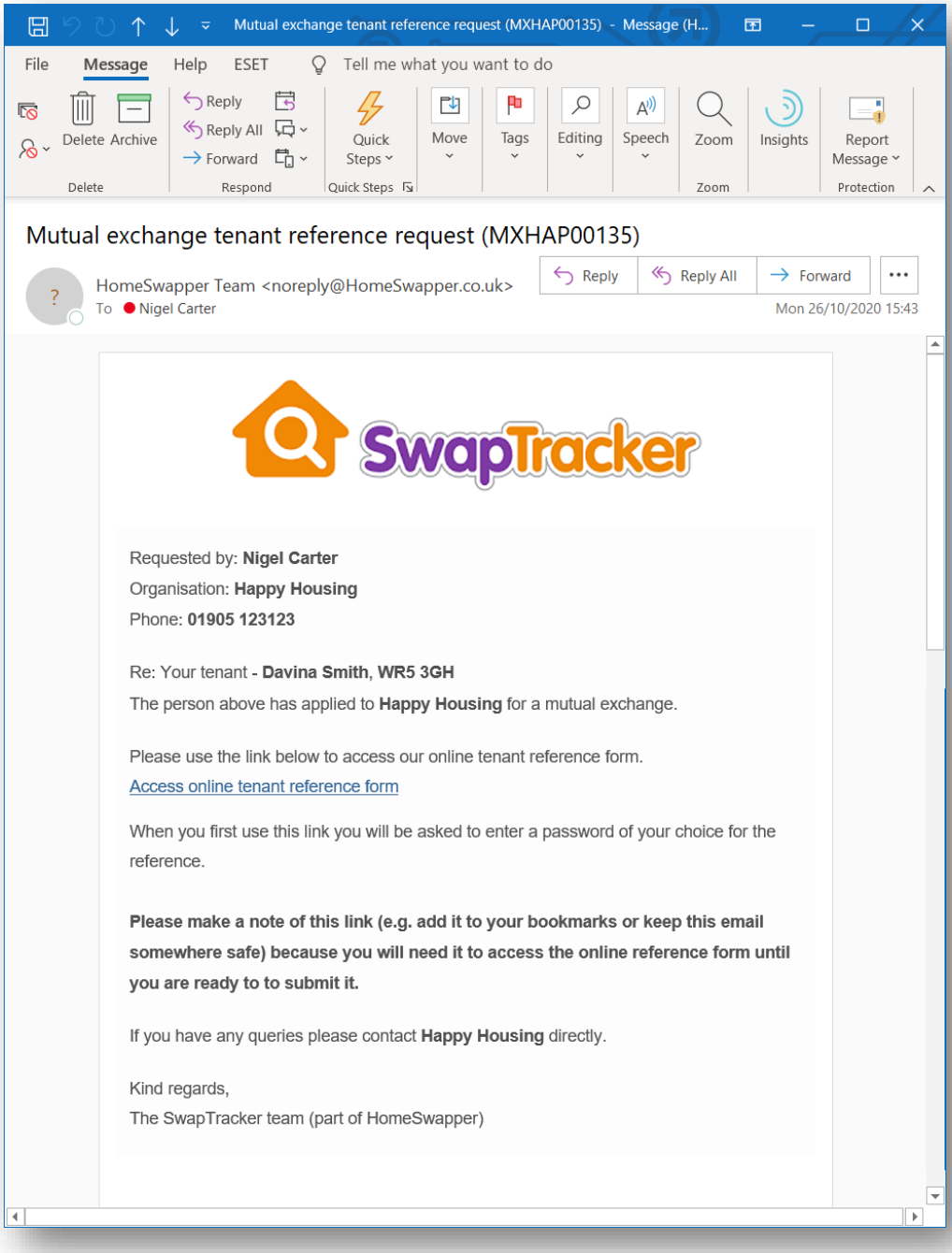




You can easily get to any reference requests that you have not yet got back from the landlord, by clicking the "*Pending*" total on the "*Reference*" panel on your organisation's dashboard.

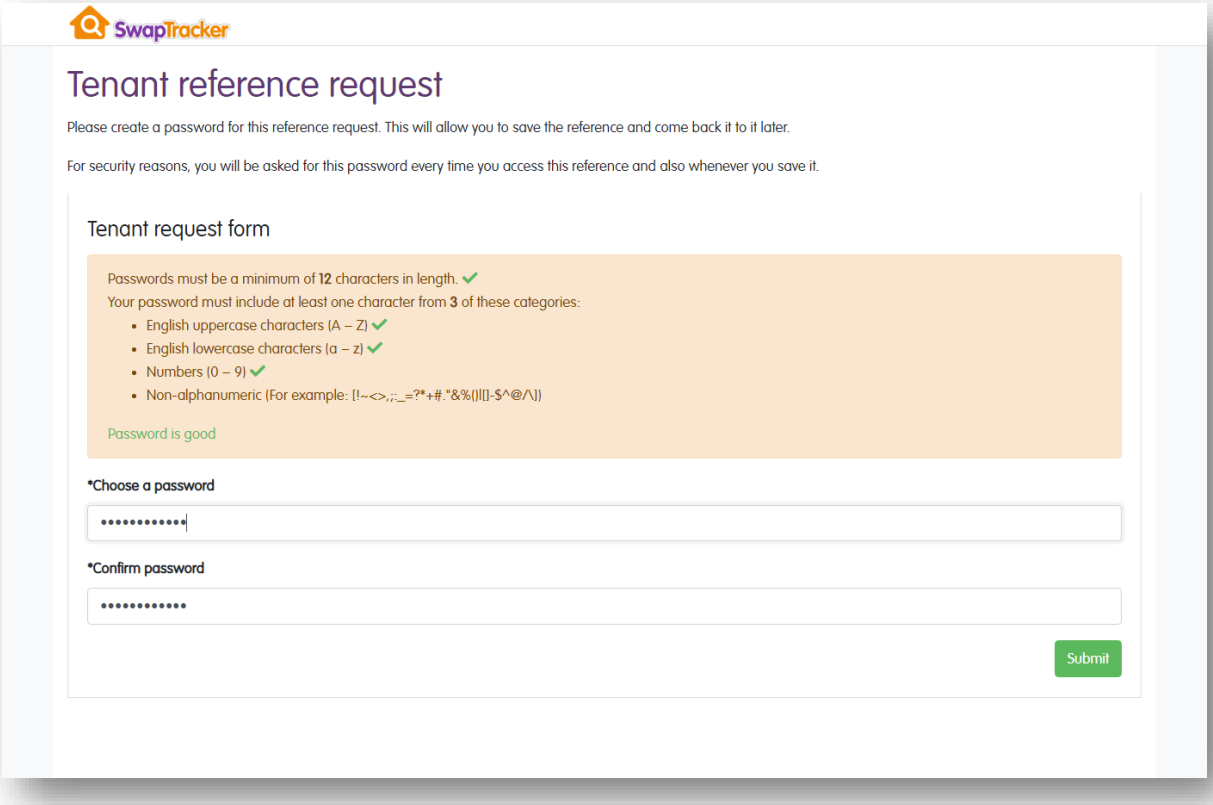
What the other landlord sees

After you've submitted a reference request, the landlord is sent an email giving them details of the exchange and the person(s) you require a reference for.

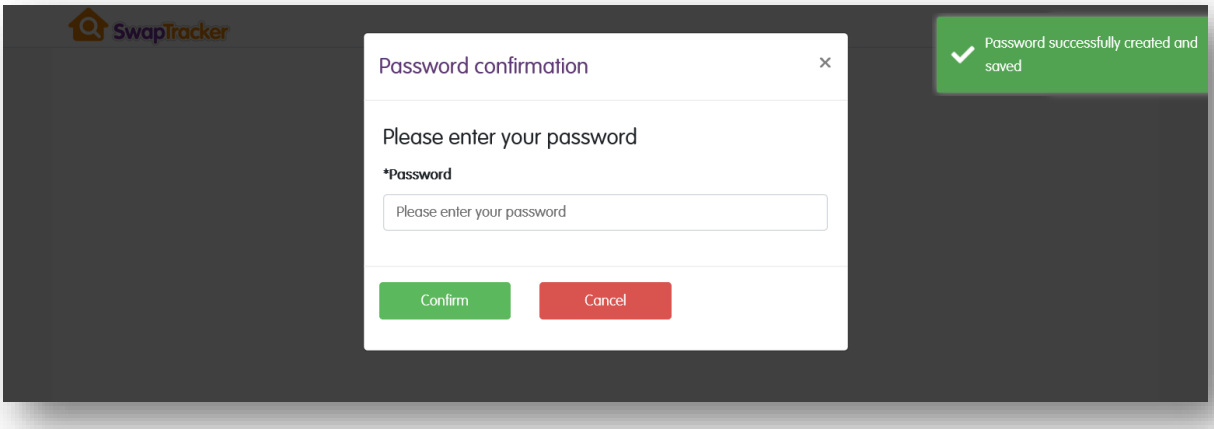


The email also contains a secure link which takes them to an online reference form.

The first thing they need to do is set a password for the reference.



This allows them to come back to it any time. They must enter the password whenever they return.



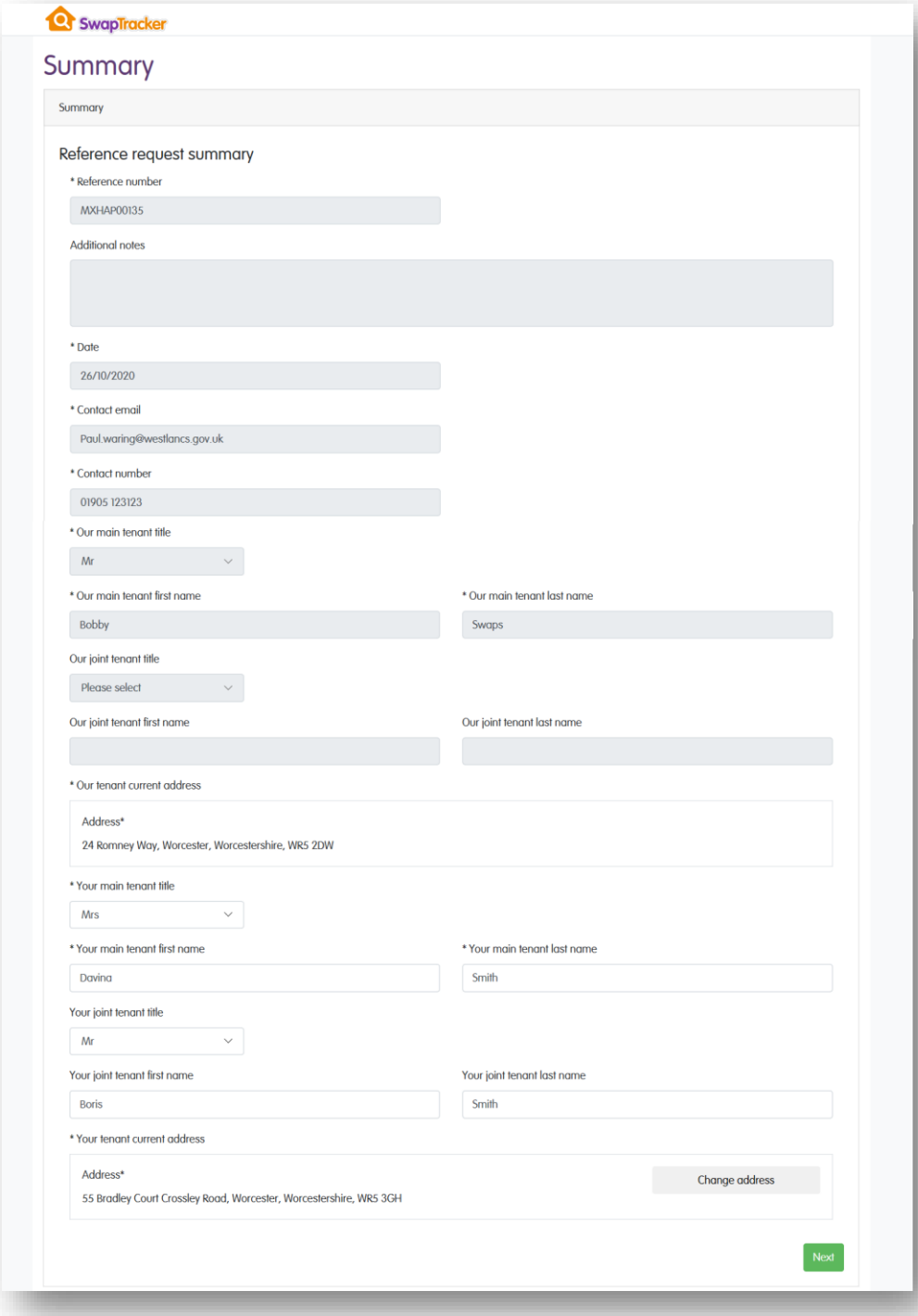
The reference form is made up of 6 sections. A full list of the questions asked can be found in Appendix Two – Tenant Reference Form

1. Reference Summary

The first page of the reference form gives an overview of the exchange.

Your details and the information about your tenant are read-only and cannot be changed.

The landlord can only update the information about their tenant(s).


SwapTracker

Summary

Summary

Reference request summary

* Reference number
MXHAP00135

Additional notes

* Date
26/10/2020

* Contact email
Paul.waring@westlancs.gov.uk

* Contact number
01905 123123

* Our main tenant title
Mr

* Our main tenant first name
Bobby

* Our main tenant last name
Swaps

Our joint tenant title
Please select

Our joint tenant first name

Our joint tenant last name

* Our tenant current address
Address*
24 Romney Way, Worcester, Worcestershire, WR5 2DW

* Your main tenant title
Mrs

* Your main tenant first name
Davina

* Your main tenant last name
Smith

Your joint tenant title
Mr

Your joint tenant first name
Boris

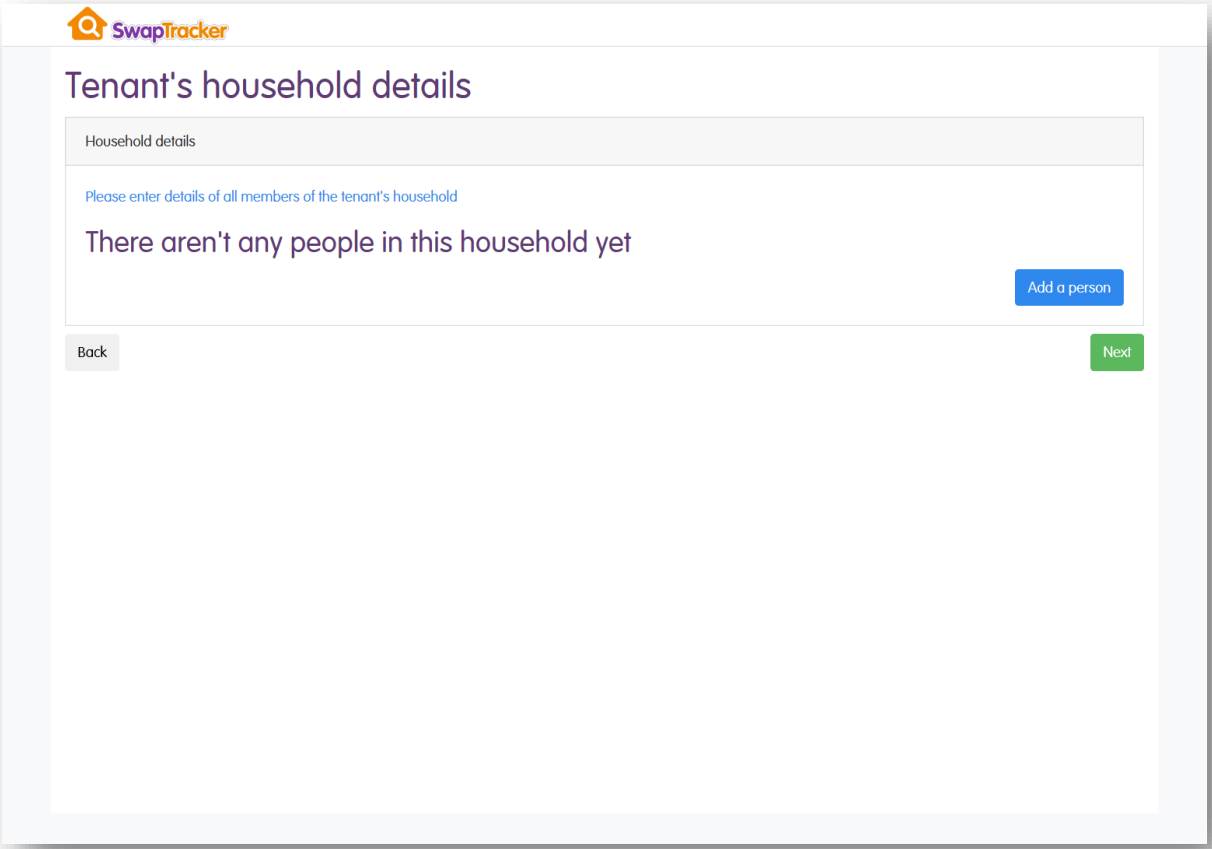
Your joint tenant last name
Smith

* Your tenant current address
Address*
55 Bradley Court Crossley Road, Worcester, Worcestershire, WR5 3GH
Change address

Next

2. Tenant's household details

This section captures details of their tenant's household, i.e. anyone who will be moving with them.

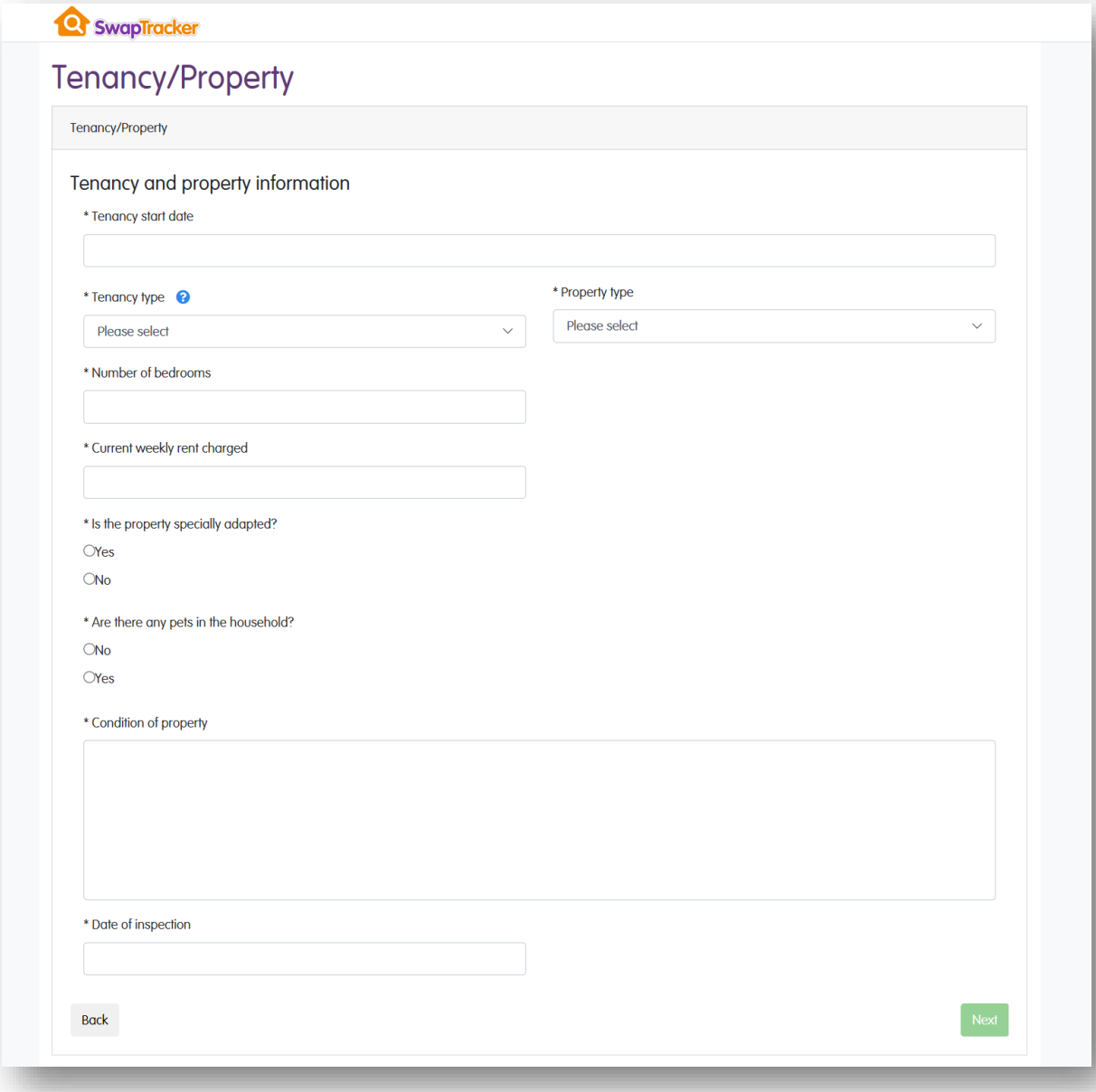


This section is optional and by default we do not ask for this information.

If you do want this as part of your reference request form, please contact Housing Partners.

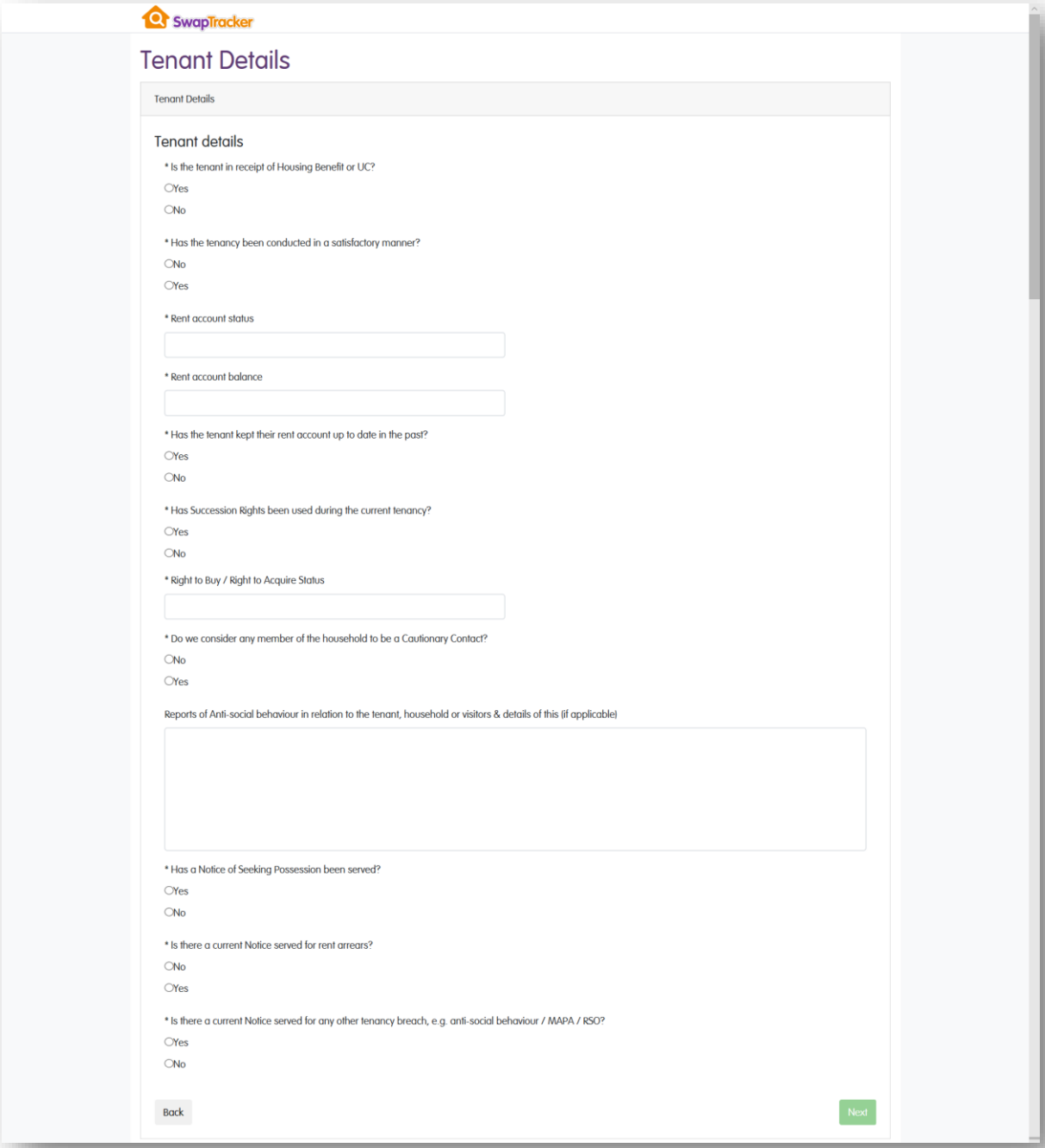
3. Tenancy/Property

This section captures details about their tenant's current home and tenancy.



4. Tenant details

This section captures more details about their tenant.



SwapTracker

Tenant Details

Tenant Details

Tenant details

* Is the tenant in receipt of Housing Benefit or UC?
○Yes
○No

* Has the tenancy been conducted in a satisfactory manner?
○No
○Yes

* Rent account status

* Rent account balance

* Has the tenant kept their rent account up to date in the past?
○Yes
○No

* Has Succession Rights been used during the current tenancy?
○Yes
○No

* Right to Buy / Right to Acquire Status

* Do we consider any member of the household to be a Cautionary Contact?
○No
○Yes

Reports of Anti-social behaviour in relation to the tenant, household or visitors & details of this (if applicable)

* Has a Notice of Seeking Possession been served?
○Yes
○No

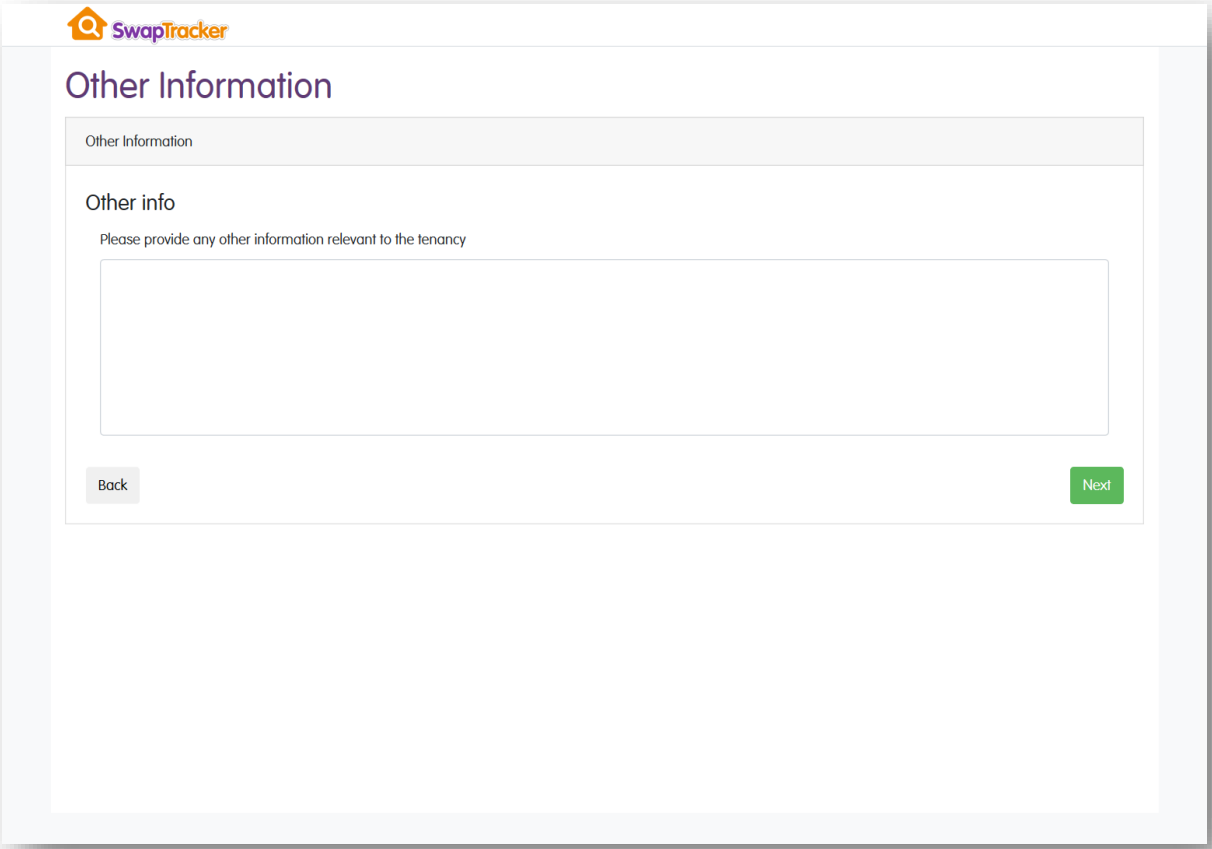
* Is there a current Notice served for rent arrears?
○No
○Yes

* Is there a current Notice served for any other tenancy breach, e.g. anti-social behaviour / MAPA / RSO?
○Yes
○No

Back Next

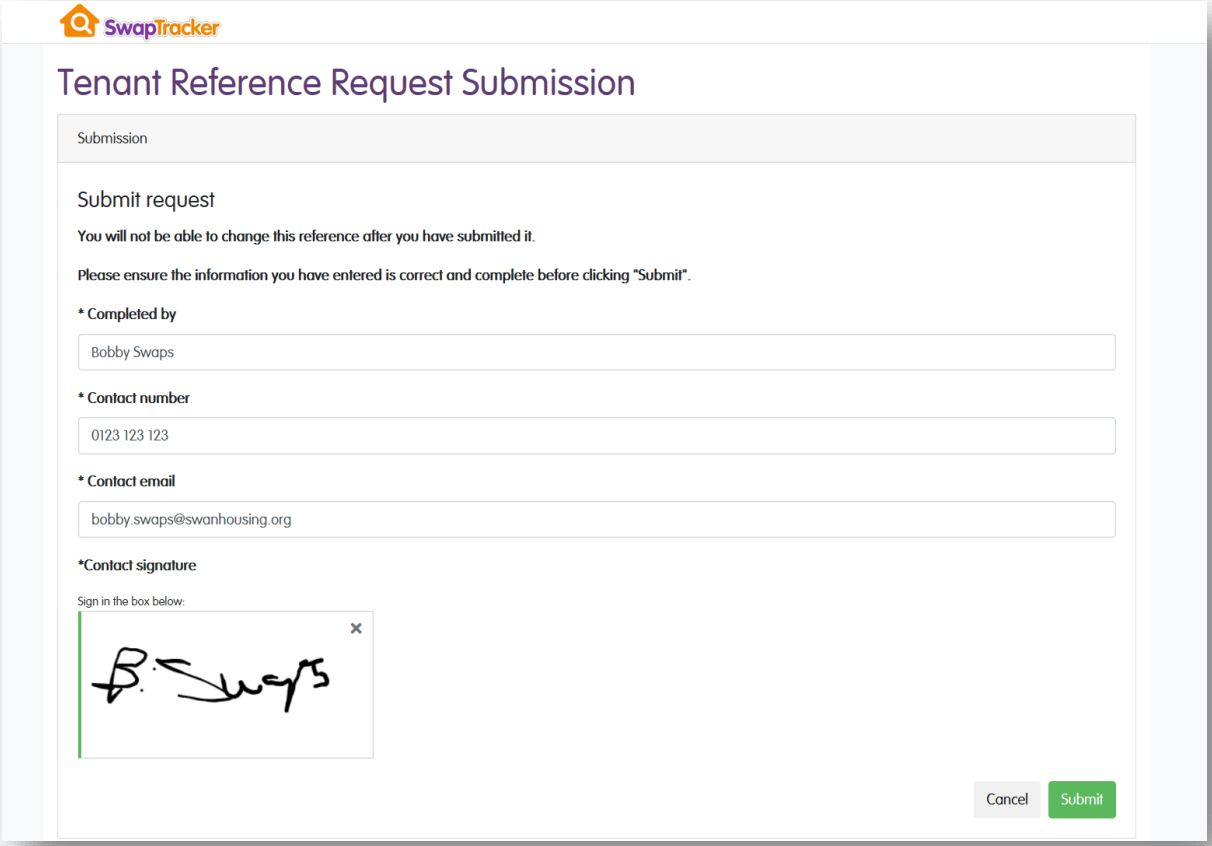
5. Other information

This section allows the landlord to enter any additional information about their tenant they believe may be relevant. This is optional.

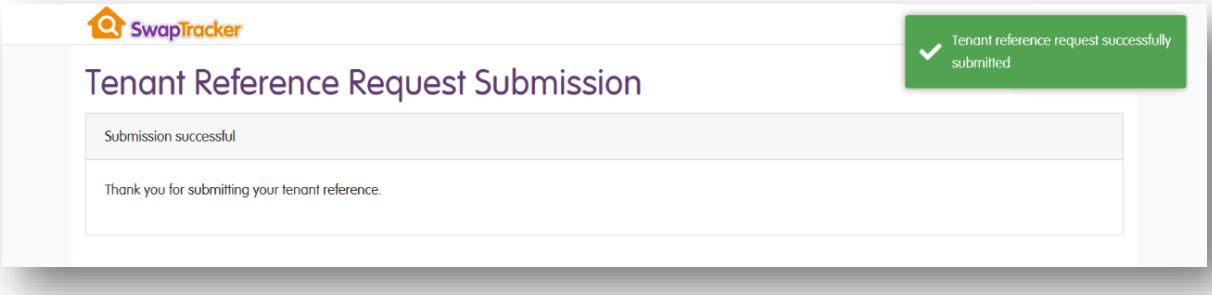


6. Tenant reference request submission

On the final page of the reference the landlord provides details of who completed the reference (including contact information) and signs the form.



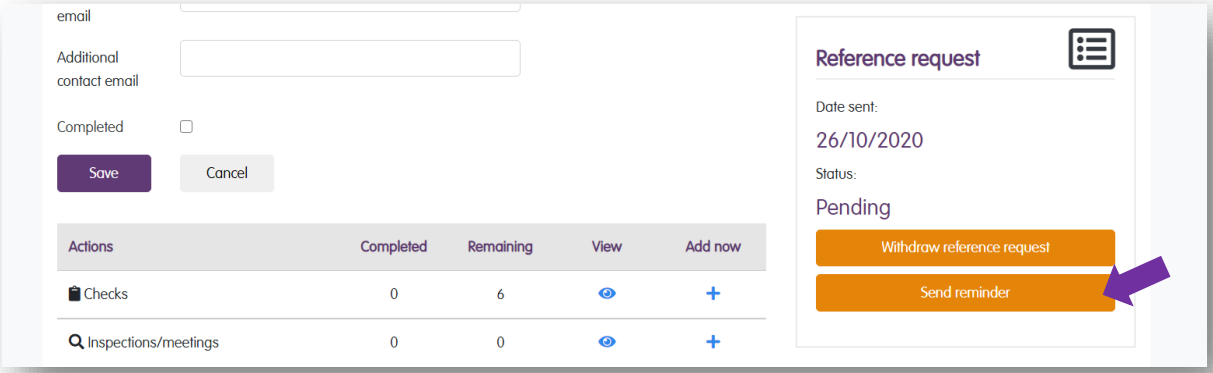
Clicking "Submit" will now lock the reference (to avoid any changes being made after it has been submitted back to you) and a "*Thank You*" message is shown.



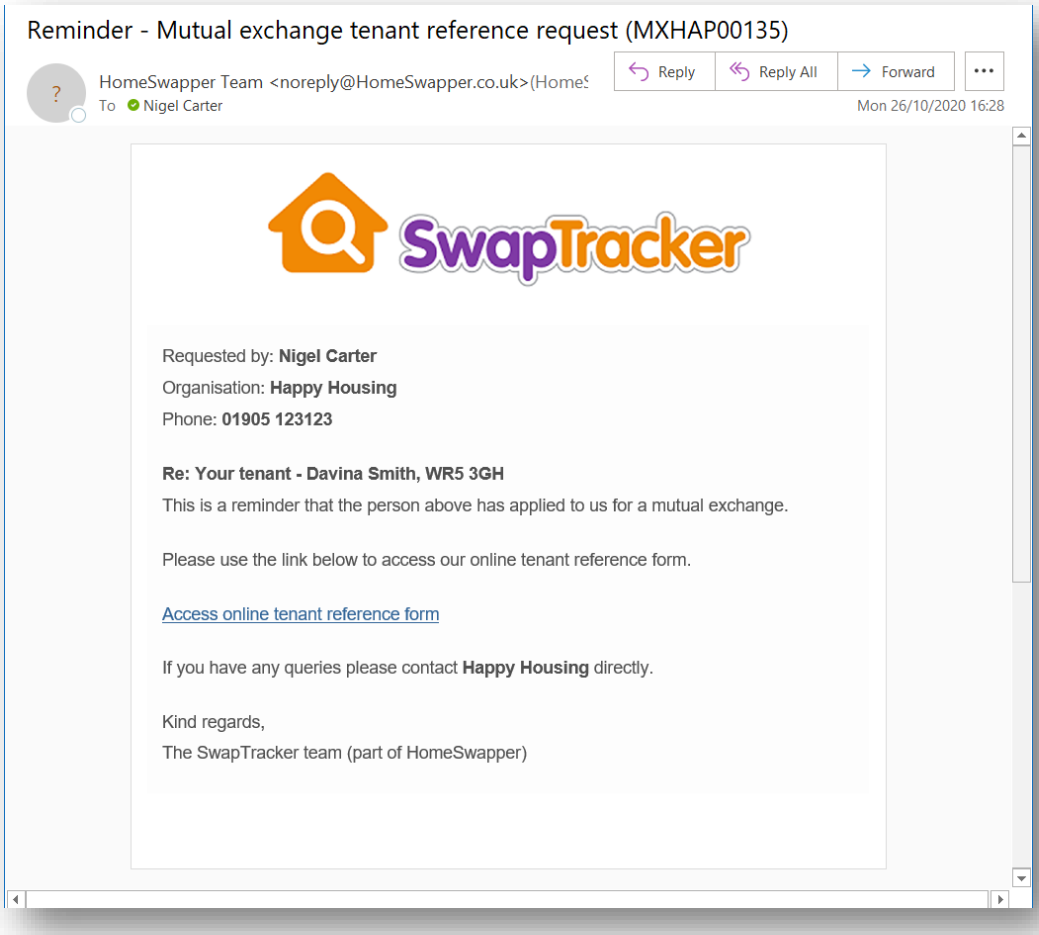
Sending a reminder

If it's been a while since you requested a reference, you may want to send a polite reminder.

You can do this by clicking the "*Send reminder*" button.

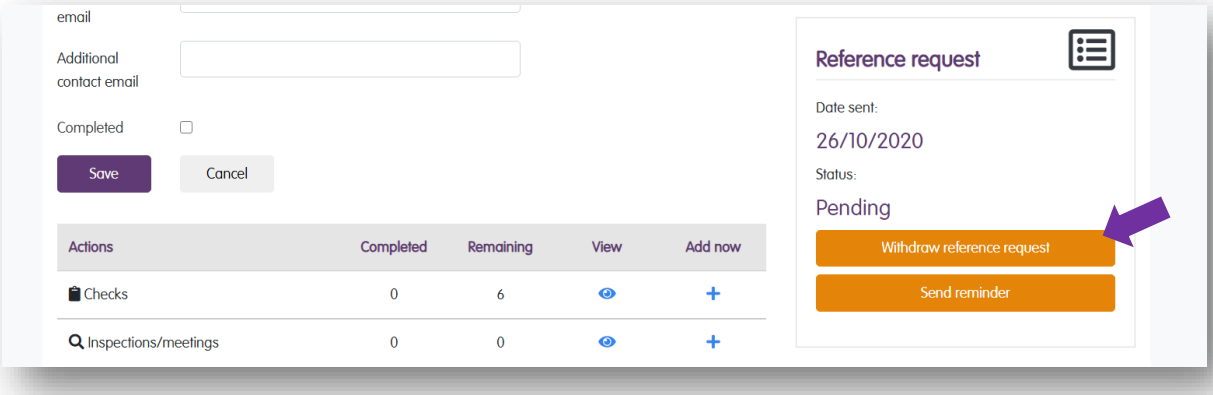


Doing this sends an email to the landlord reminding them of the reference request and includes another link to the form just in case.

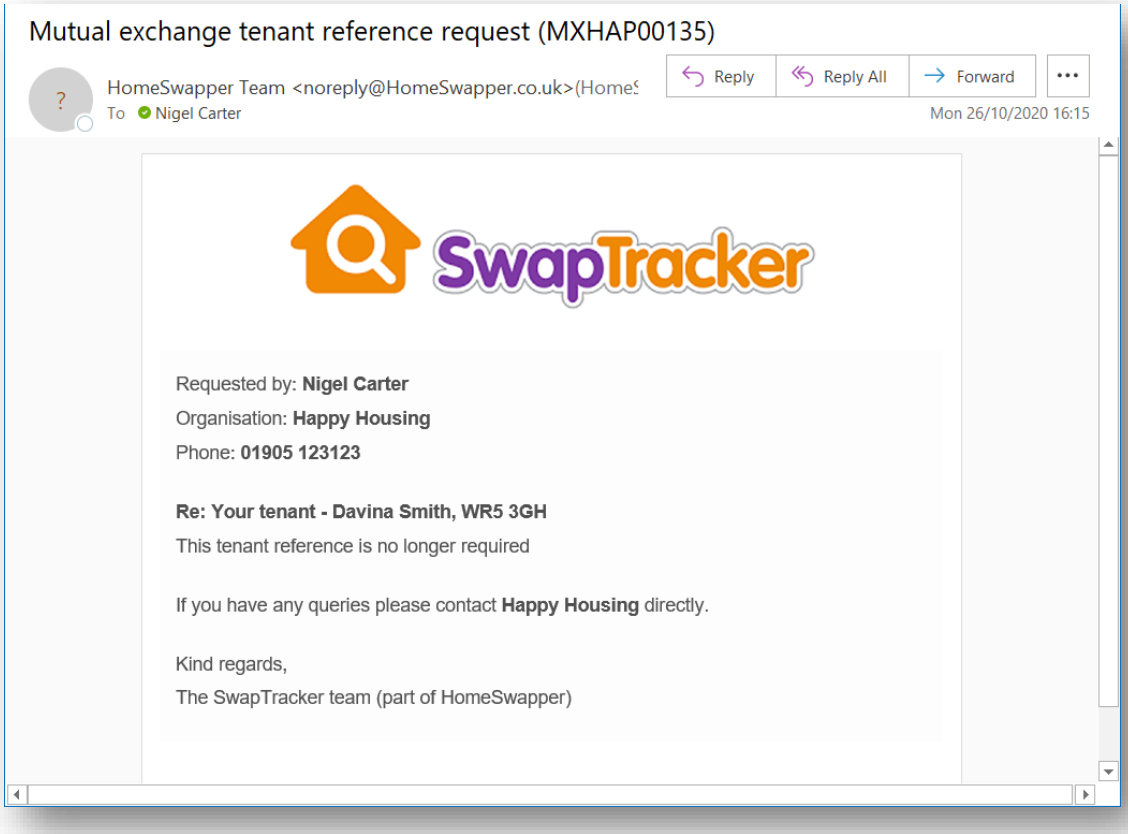


Withdrawing a reference request

If you need to withdraw a reference request, click the "*Withdraw reference request*" button.



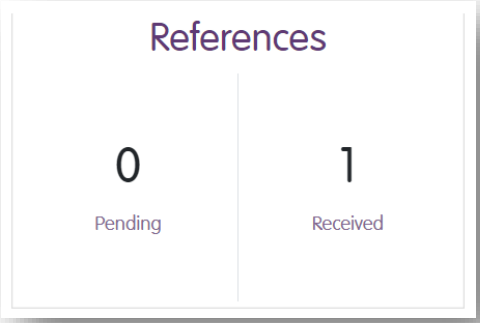
Doing this sends an email to the landlord informing them that the reference is no longer required.

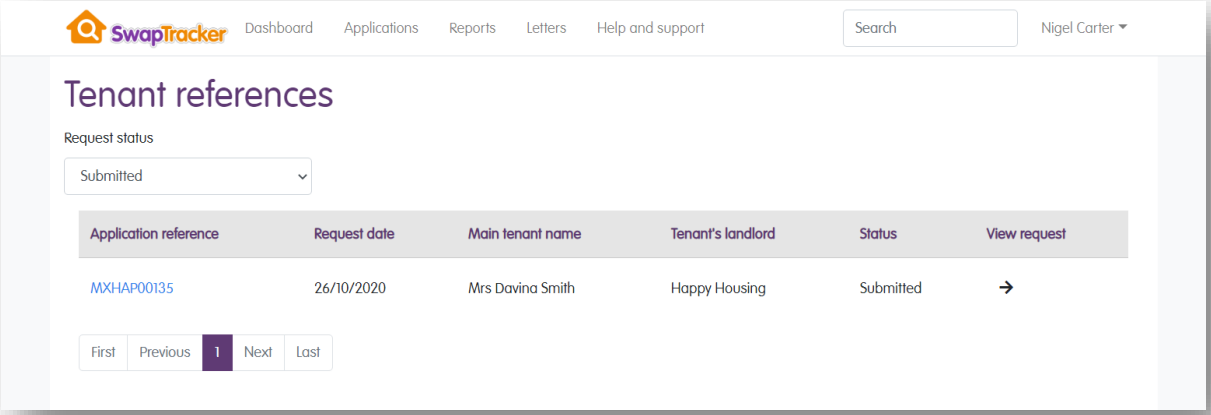


Reviewing a submitted request

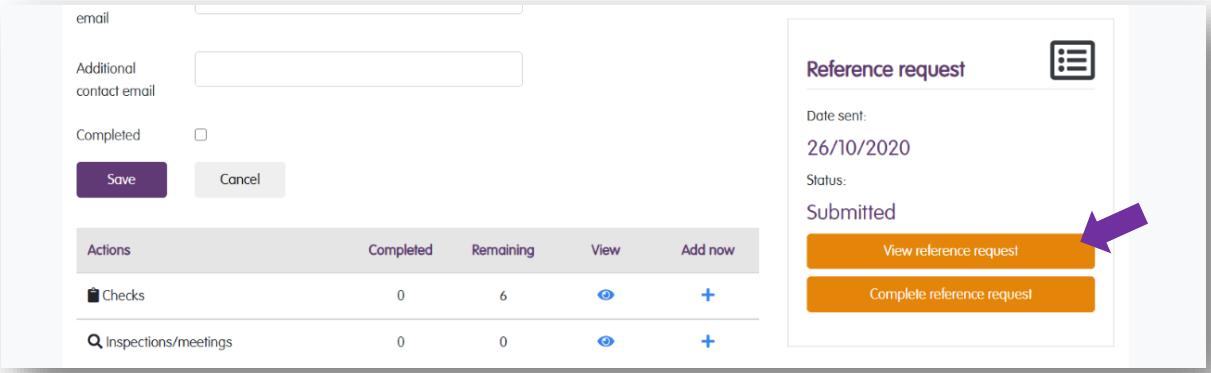
After a landlord has completed a reference and submitted it, a notification is sent to the contact email addresses for that application, letting you know it's ready to view.

You can access a list of references you have received by clicking the "*Received*" total on the References section of your Dashboard.

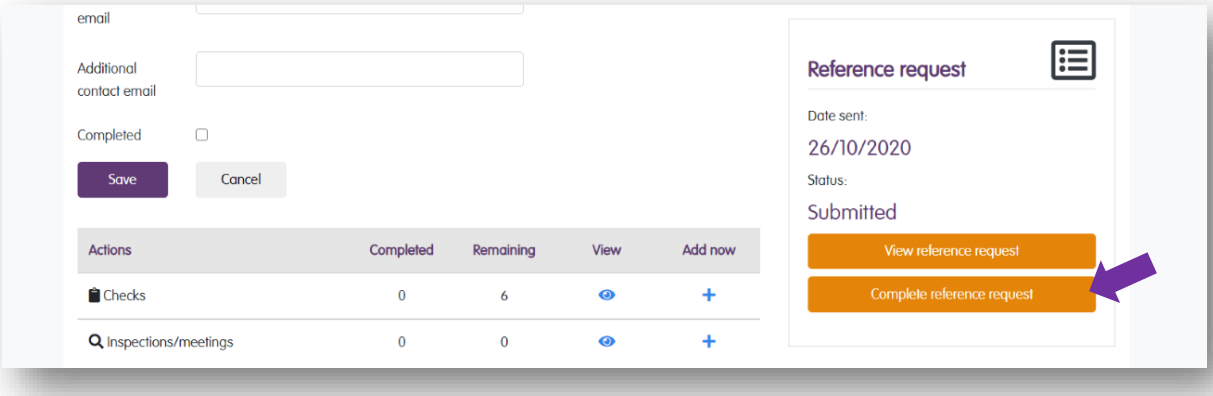




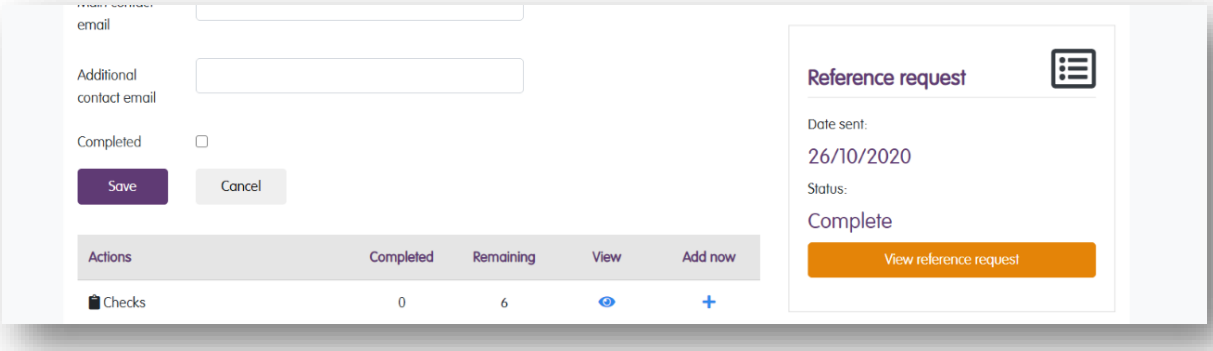
To look at the reference they've provided, simply click on the "*View reference request*" button.



After reviewing the reference, click the "*Complete reference request*" button.



This is good housekeeping, because it will set the reference request to "*Complete*" and remove it from your "*Received*" total on your dashboard.

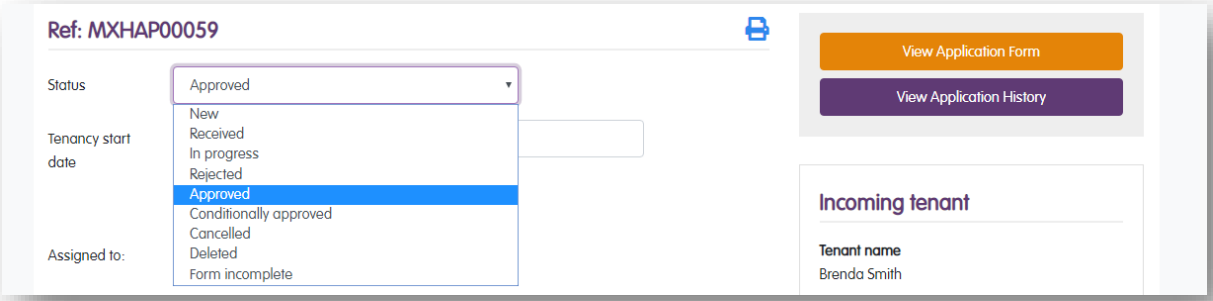


After setting the reference request to "*Complete*", you can still view the reference at any time by clicking the "*View reference request*" button.

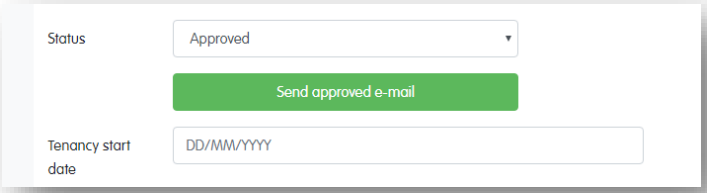
DECISIONS

Approving an application

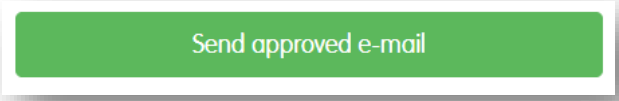
To set an application to "Approved" simply select that status from the list and click "Save".



A box to enter a Tenancy Start Date will then be shown. This can be entered at any time once the date has been agreed.



A button to send an Approval email to the tenant will also be displayed.



Note: An Approval email is not automatically sent out when the status of the application is changed.

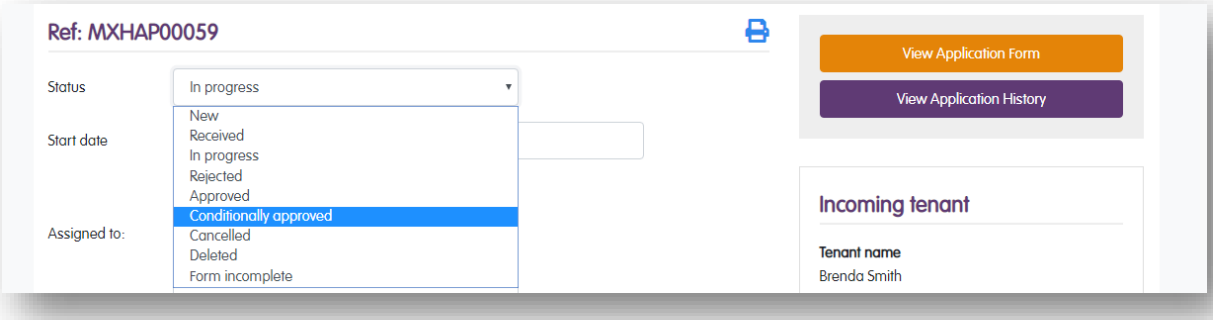
This is a manual process. For example, you would not want an email being sent to the tenant if the status had been selected by mistake.

An Approval letter can be created – see Creating Letters

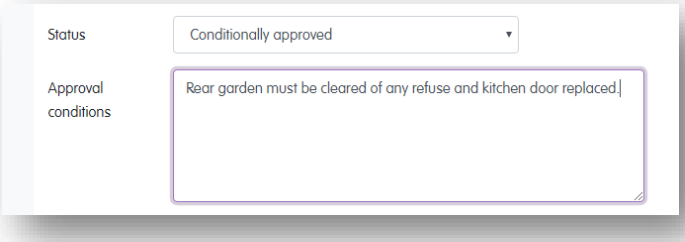
Important: the tenant will still be able to access their SwapTracker dashboard to view progress, see documents, etc, until you set the application to "Complete" – see Setting an Application to Complete

Conditionally Approving an application

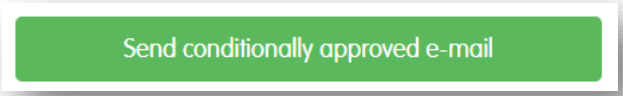
To set an application to "Conditionally Approved" simply select that status from the list.



You will then be prompted to enter details of the related "*Approval conditions*".



When the application is saved, a button to send a Conditional Approval email to the tenant will be displayed.



Note: A Conditional Approval email is not automatically sent out when the status of the application is changed.

This is a manual process. For example, you would not want an email being sent to the tenant if the status had been selected by mistake.

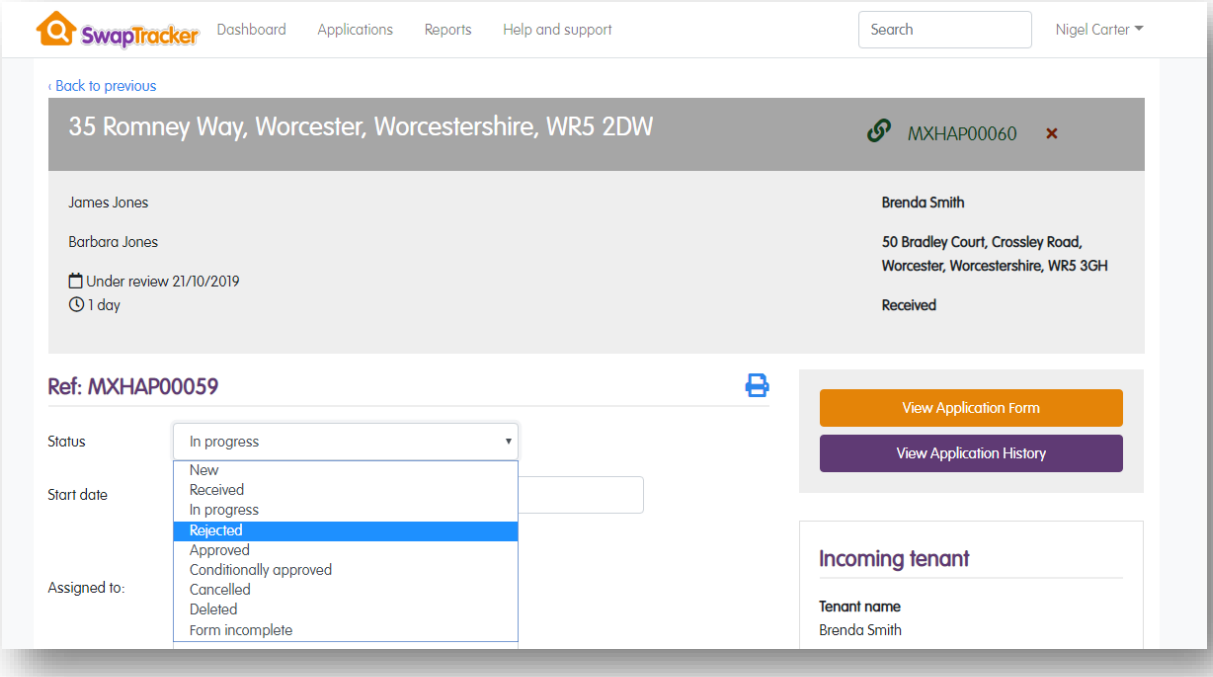
A box to enter a Tenancy Start Date will then be shown. This can be entered at any time once the date has been agreed.

A Conditional Approval letter can be created – see Creating Letters

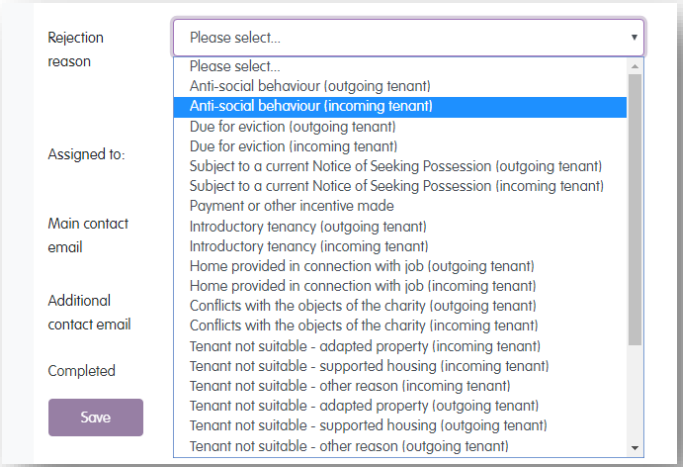
Important: the tenant will still be able to access their SwapTracker dashboard to view progress (including the approval conditions you have stated), see documents, etc, until you set the application to "Complete" – see Setting an Application to Complete

Refusing an application

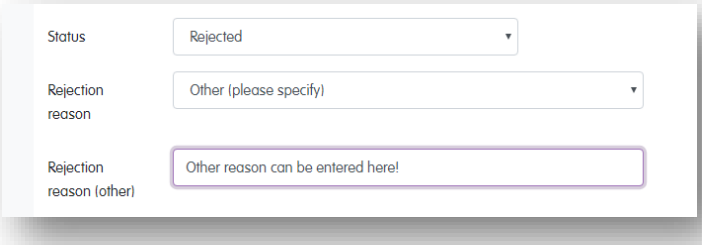
To set an application to "Rejected" simply select that status from the list.



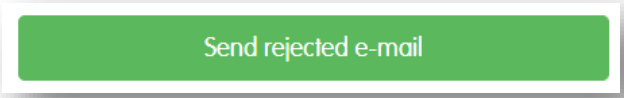
You will then be prompted to give a Rejection reason.



You can either select a standard reason from the list or select "*Other (please specify)*" and enter your own reason in the text box provided.



When the application is saved, a button to send a Rejection email to the tenant will be displayed.



Note: A Rejection email is not automatically sent out when the status of the application is changed.

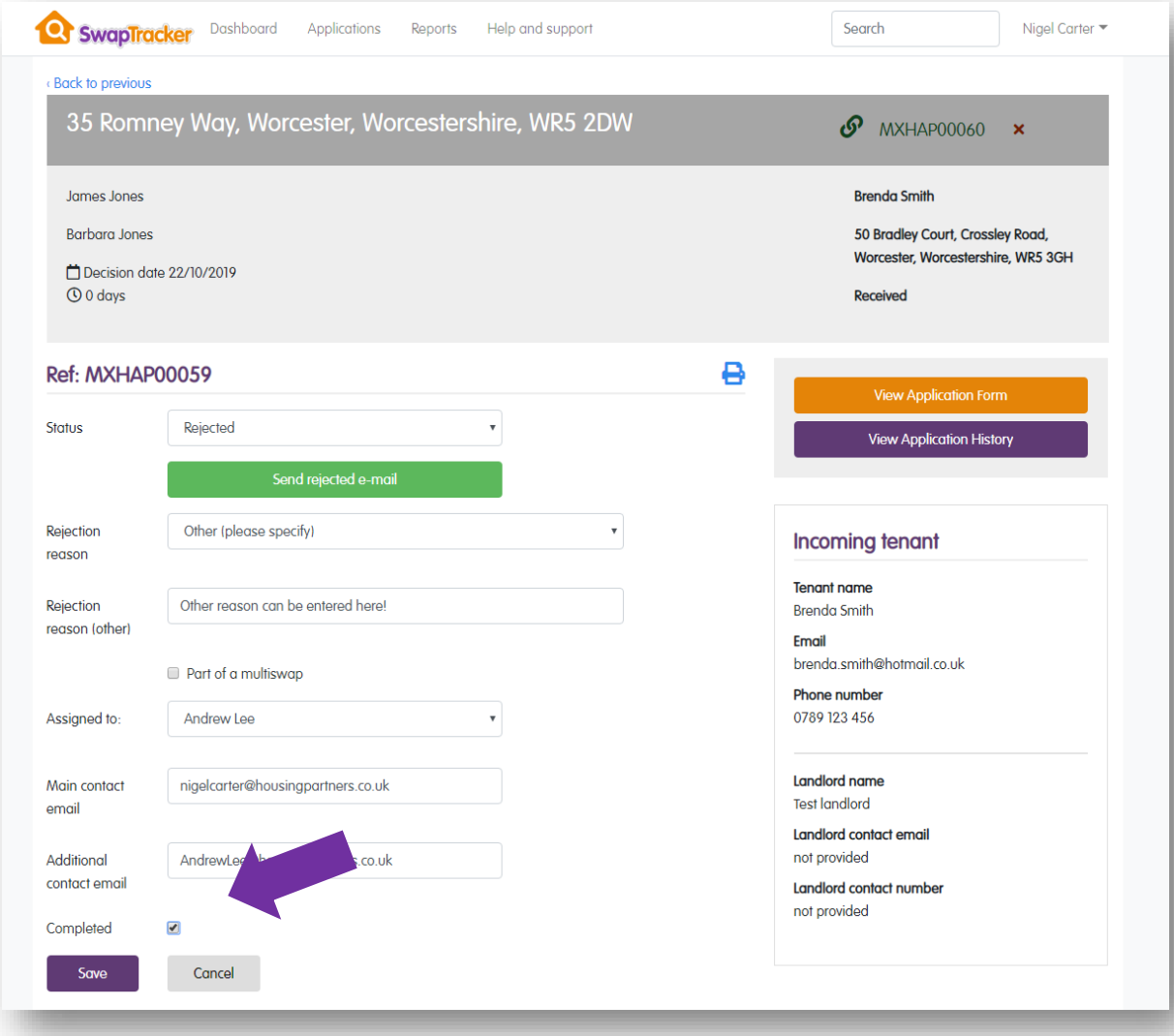
This is a manual process. For example, you would not want an email being sent to the tenant if the status had been selected by mistake.

A Rejected letter can be created – see Creating Letters

Important: when an application is set to "Rejected" the tenant is no longer able to access their SwapTracker dashboard for that application.

SETTING AN APPLICATION TO COMPLETE

When you are ready to set an application to complete (e.g. the decisions have been made and the tenancies signed-up) simply tick the "*Completed*" box at the bottom of the Application Summary page and click "*Save*".

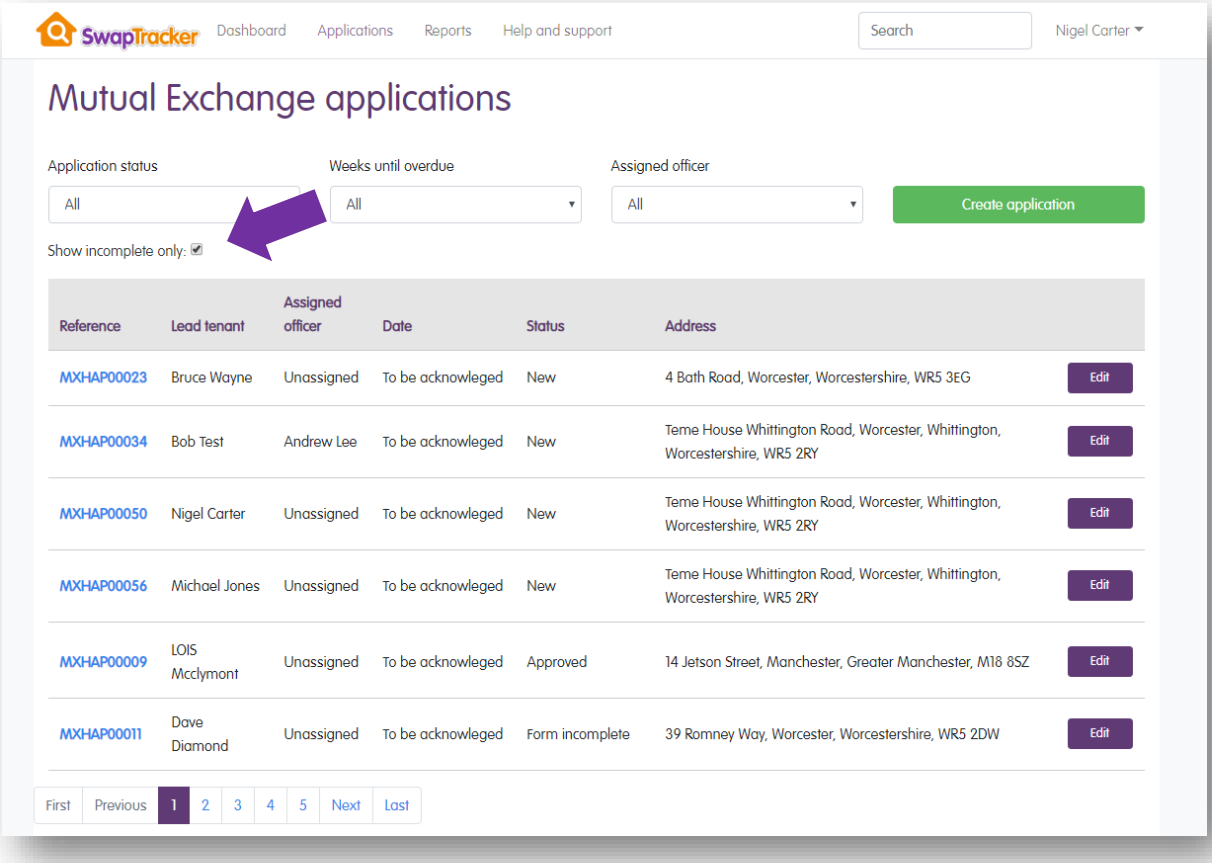


By default, applications that been set to "Complete" are not shown in the list of applications (or included in your Dashboard totals).

This is a convenient way of marking applications as not requiring anything more to be done on them so you can concentrate on only your active applications in SwapTracker.

Important: if the application was "Approved" or "Conditionally approved", the tenant can continue to access their SwapTracker dashboard until you set their application to "Complete". When this is done, they cannot access their dashboard and if their HomeSwapper account is set to "Swapped".

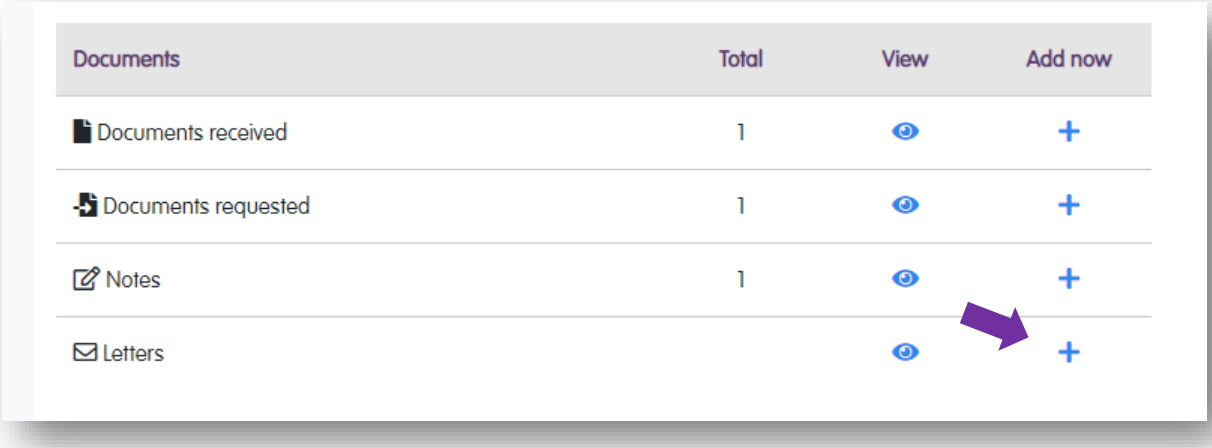
If you do want to include complete applications in any list, un-tick the "*Show incomplete only*" tick box.



LETTERS

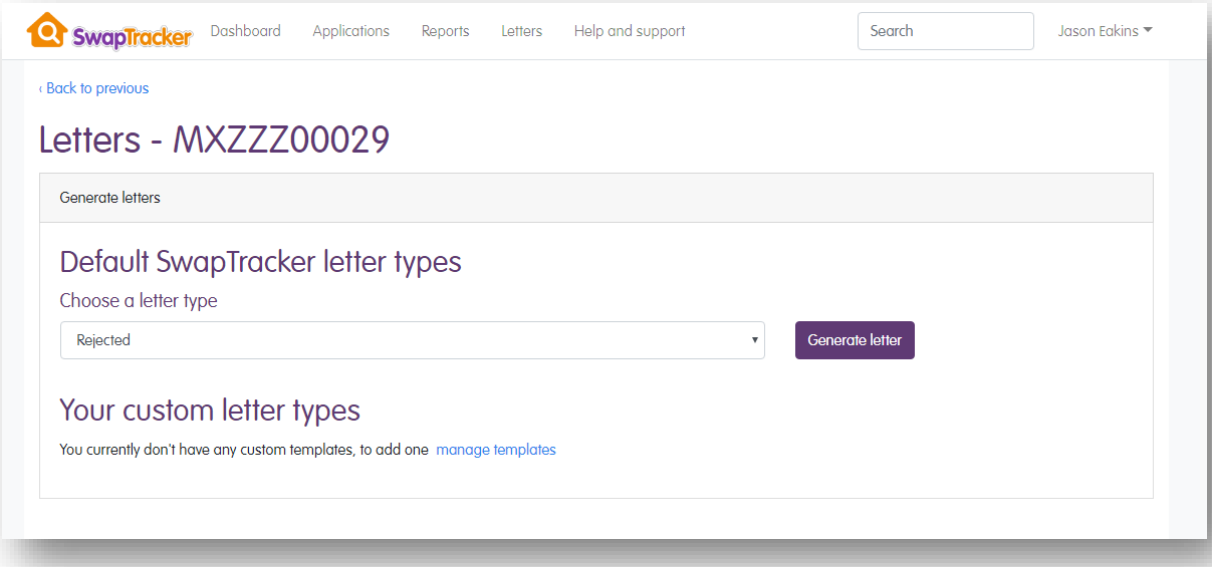
Creating letters for an application

Letters can be created for an application by clicking the "+" (Add now) icon on the Application Summary page:



You can either select from the default SwapTracker letters (approval, conditional approval and rejected) or use one of your own.

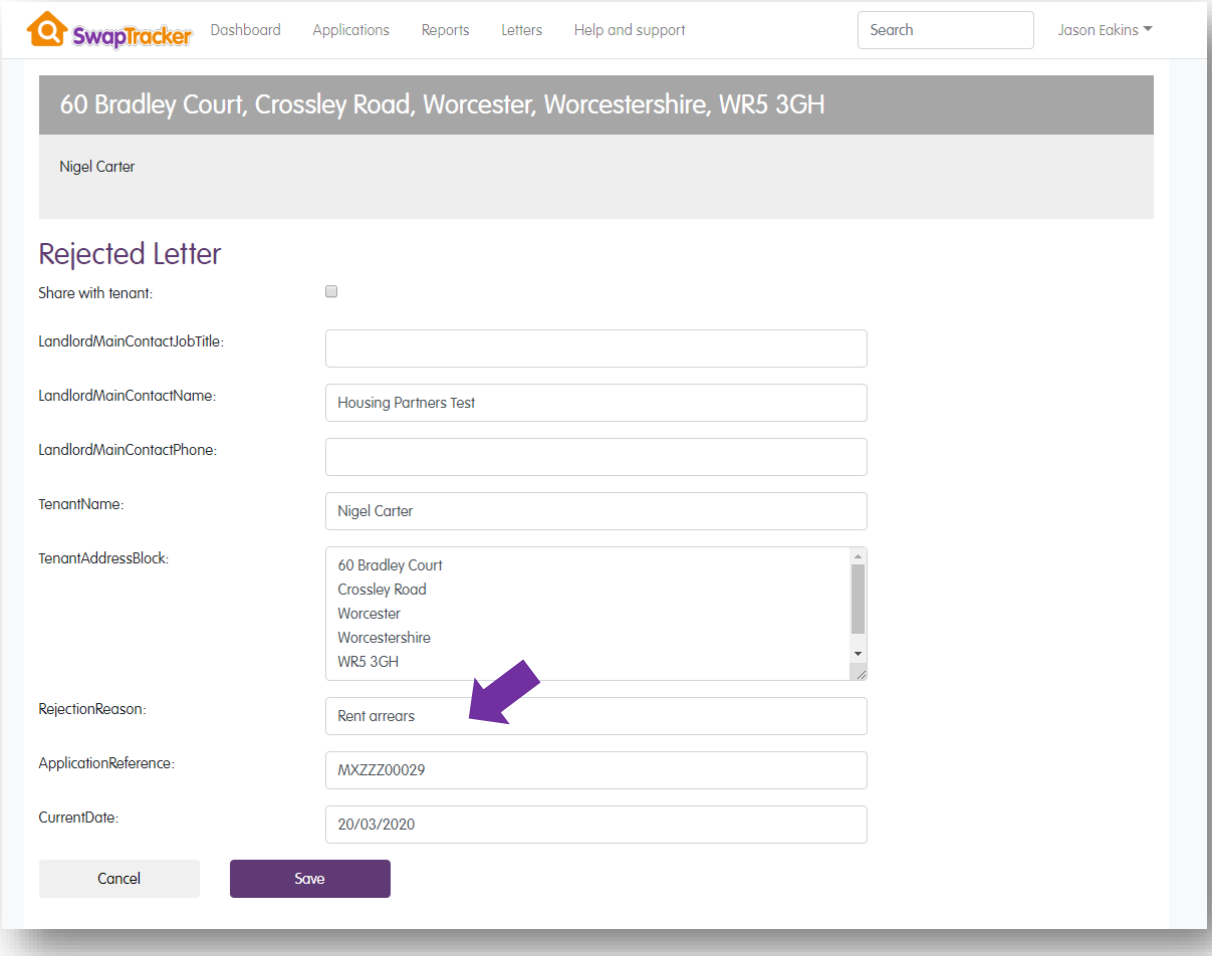
For more details on adding your own templates or amending the default ones, please refer to Letter Templates



For example, selecting the "*Rejected*" letter type and clicking "*Generate letter*" takes you to a page showing all the "merge fields" for that letter.

Wherever possible these fields will be pre-populated from the application you are creating the letter for.

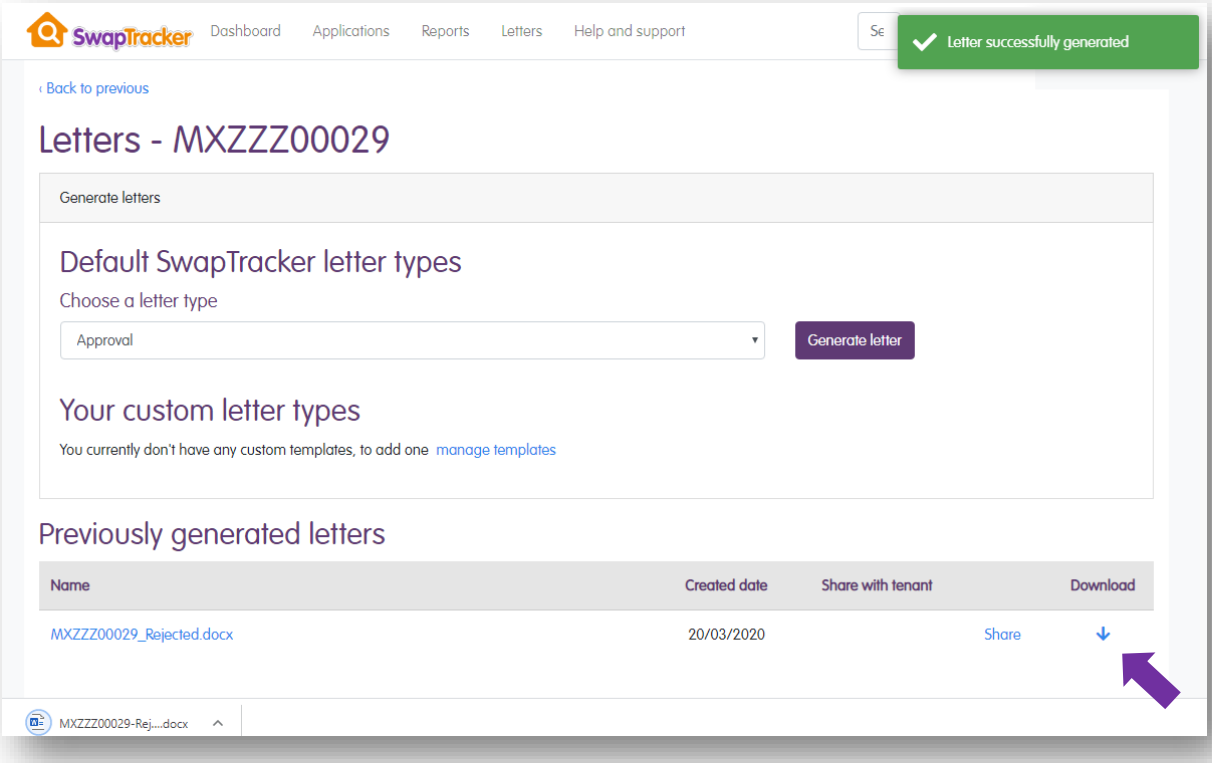
However, you can still amend any of these fields on this page before creating the letter, e.g. in this instance you might want to add some more information to the rejection reason that will be shown in the letter:



Clicking "Save" creates a Microsoft Word letter using the template and these merge field values.

The letter created is stored against the application.

Click the "*Download*" arrow to view the letter, print it, etc.



As you can see from the example of a "Rejected" letter below, the template automatically pulls in the relevant details for that application, e.g. tenant name, address, and reason for refusal.

Your organisation's logo is also included.

HAPPY HOUSING

Nigel Carter

60 Bradley Court
Crossley Road
Worcester
Worcestershire
WR5 3GH

Date: 20/03/2020

Our ref: MXZZZ00029

Dear Nigel Carter,

RE: Mutual Exchange Application – Refusal

We have now considered your recent application for a mutual exchange. I am sorry to advise that we have to refuse your request. The reason for our decision is:

Rent arrears

If I can be of any further help to you, please ring me on

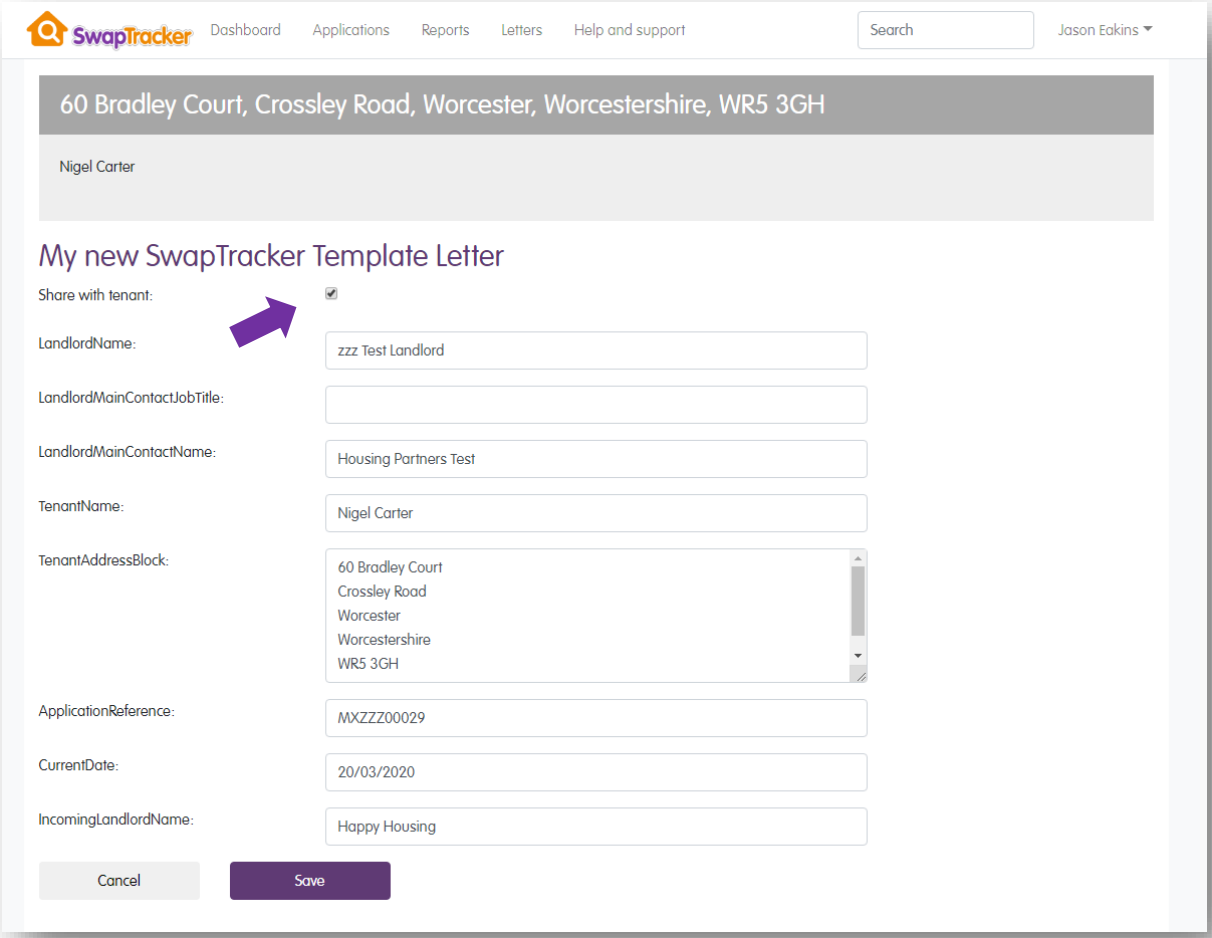
Yours sincerely,

Housing Partners Test

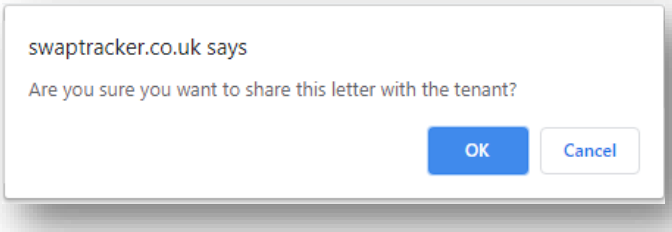
Sharing letters with tenants

If you want to provide more transparency and keep the tenant up to date, you can also choose to "share" the letters you create against their application.

To share a letter with a tenant simply tick the "Share with tenant" box when generating it:



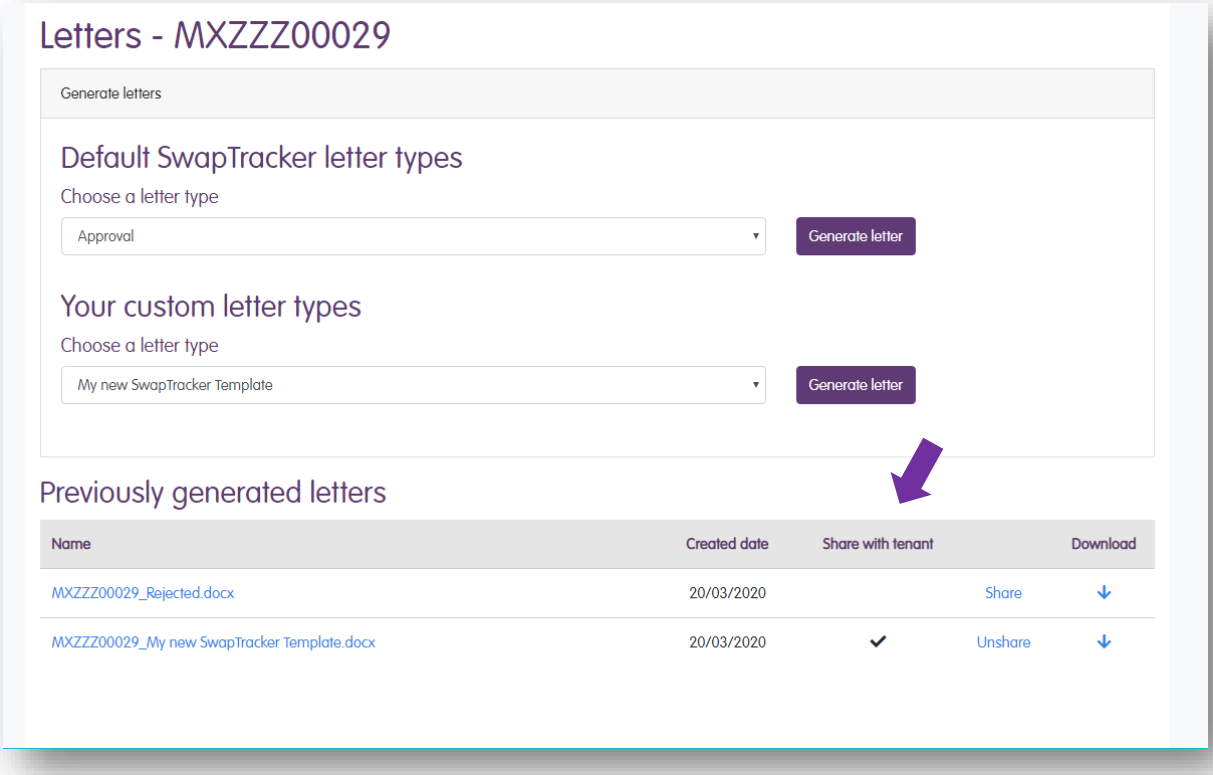
When you click "Save" you will then be asked to confirm you wish to share it:



Sharing letters allows the tenant to see them on their SwapTracker.

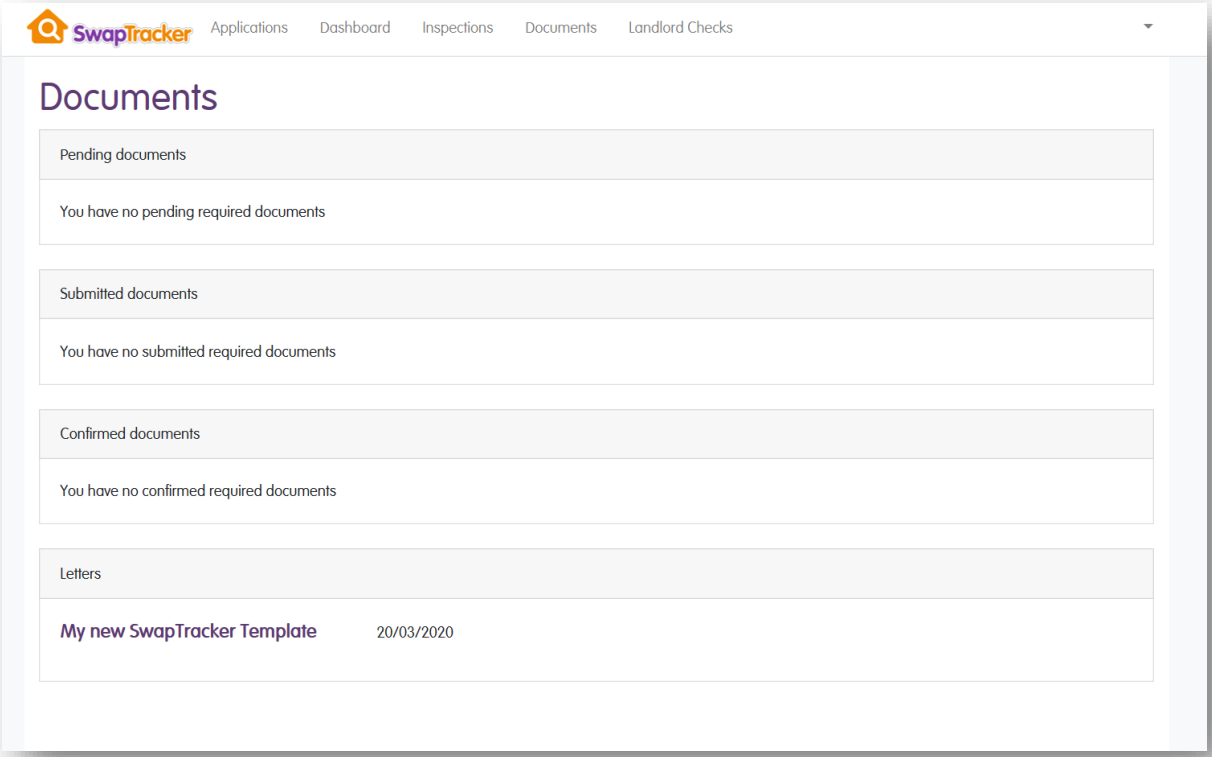
Note: by default, letters are NOT shared with tenants.

On the list of letters for an application you can see which are shared and which are not.

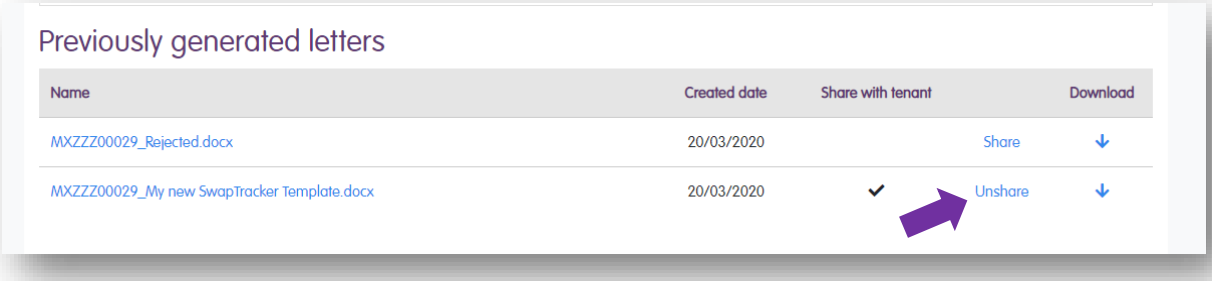


When you do share a letter, the tenant receives an email notifying them of this.

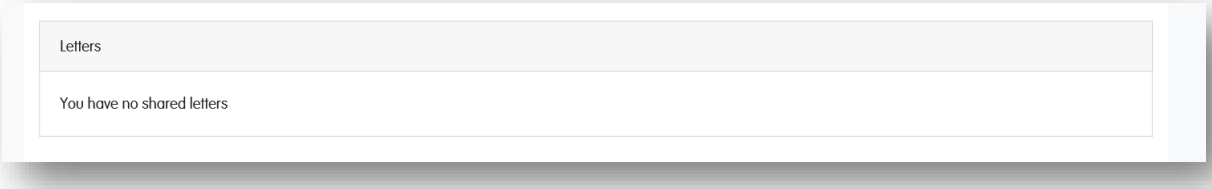
When they log into SwapTracker, they can then see details of their letters in the "Documents" section:



If you need to un-share a letter, simply click the "Unshare" link next to it.



The letter will then be hidden from the tenant's SwapTracker.



As with un-sharing, you can also share an existing letter, by clicking the "Share" link next to it. Again, the tenant is emailed and will be able to see that letter in their SwapTracker.

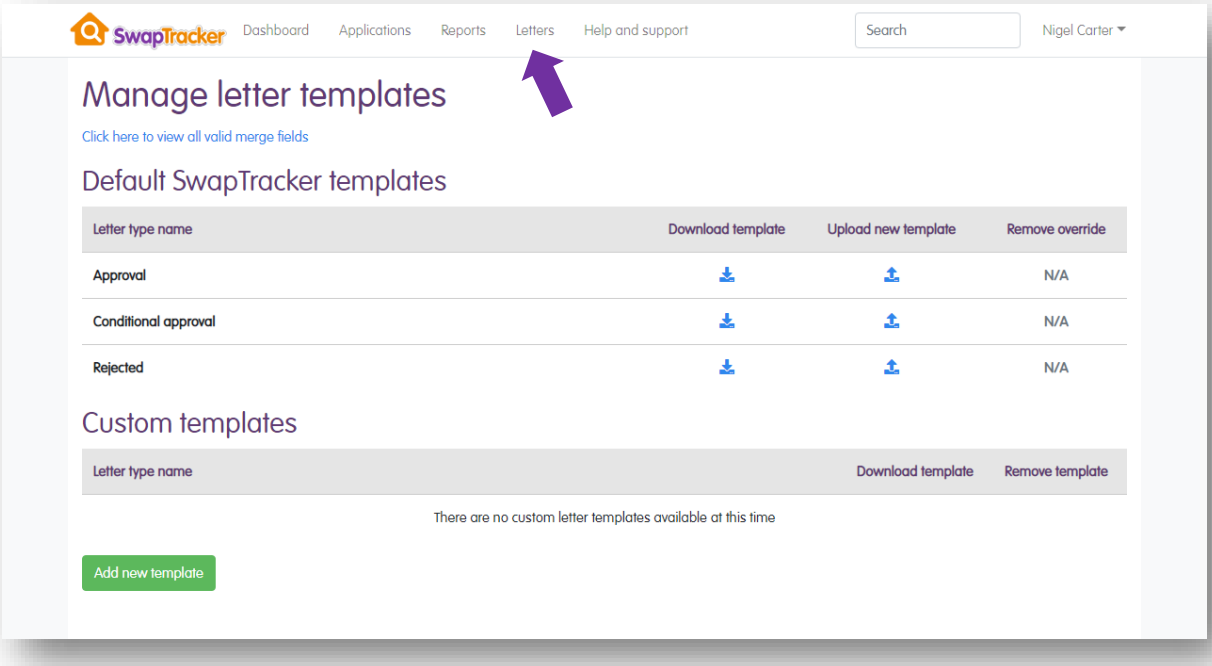
Note: all letters that are shared can be seen by the tenant in the their "Documents" section.

For this reason, you should always be careful not share any letters you would not want the tenant to see!

LETTER TEMPLATES

You can add/amend your SwapTracker letter templates in the "*Letters*" section.

This can be accessed by clicking on "*Letters*" in the top menu.



Adding your own templates

To add your own templates, you must first create one in Microsoft Word (or you may already have similar templates you are using now).

When creating templates, you can use any text and formatting you wish as well as including images. To pull in information automatically from the application (e.g. tenant name) you can also add "merge fields" to your templates.

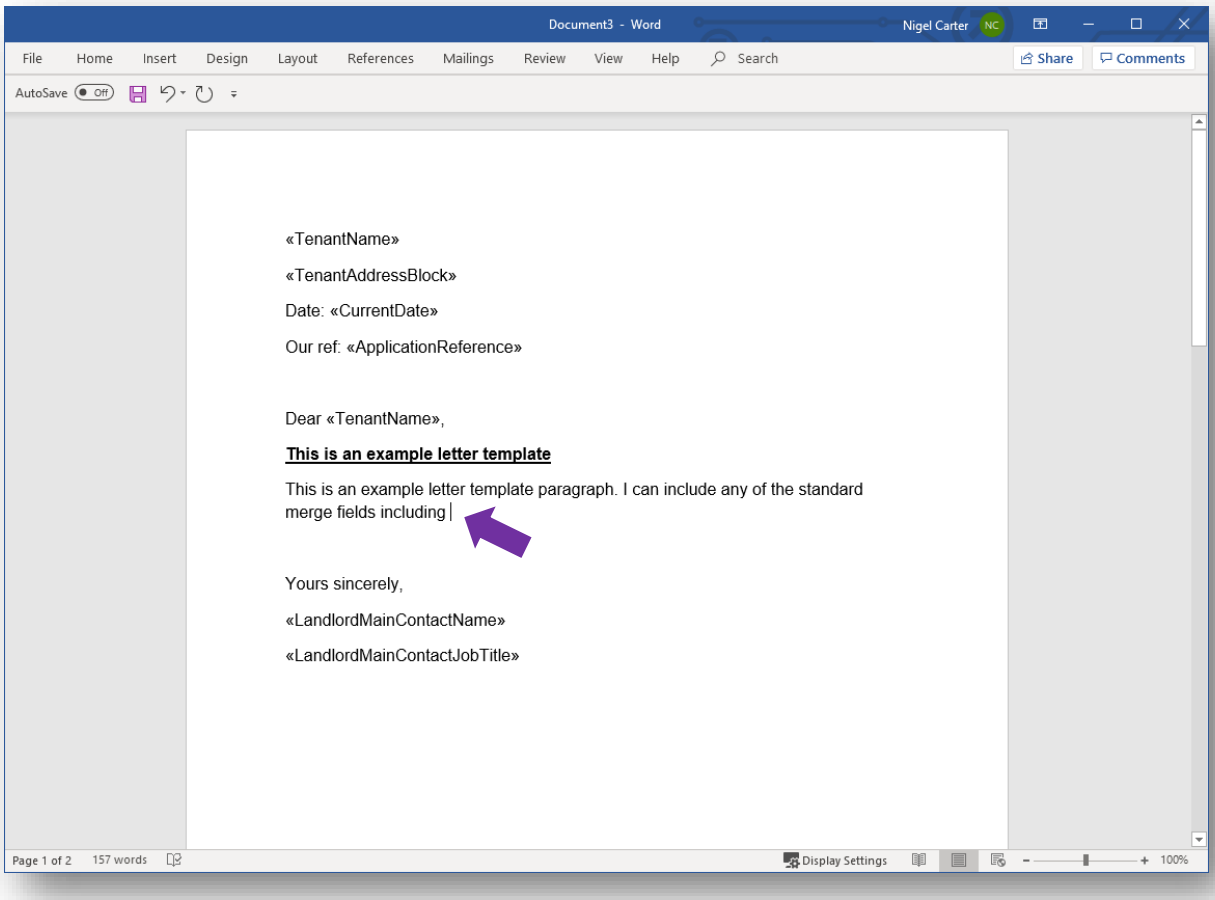
Adding "Merge fields"

"Merge fields" are placeholders in your letter template which will be automatically populated when you create that letter against the SwapTracker application, e.g. the tenant name.

A full list of merge fields can be found in Appendix One – SwapTracker Merge Fields

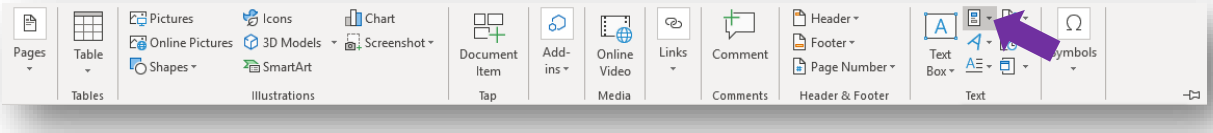
To insert a merge field in your templates, follow these steps:

1. Click in the word document where you want to add it, e.g.

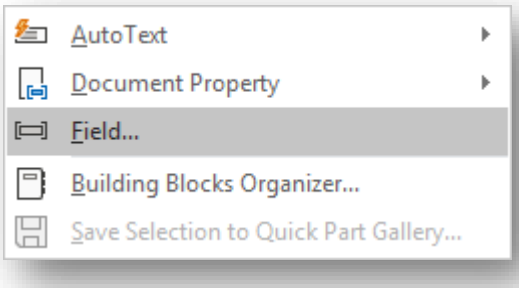


2. In the top menu, click on "Insert".

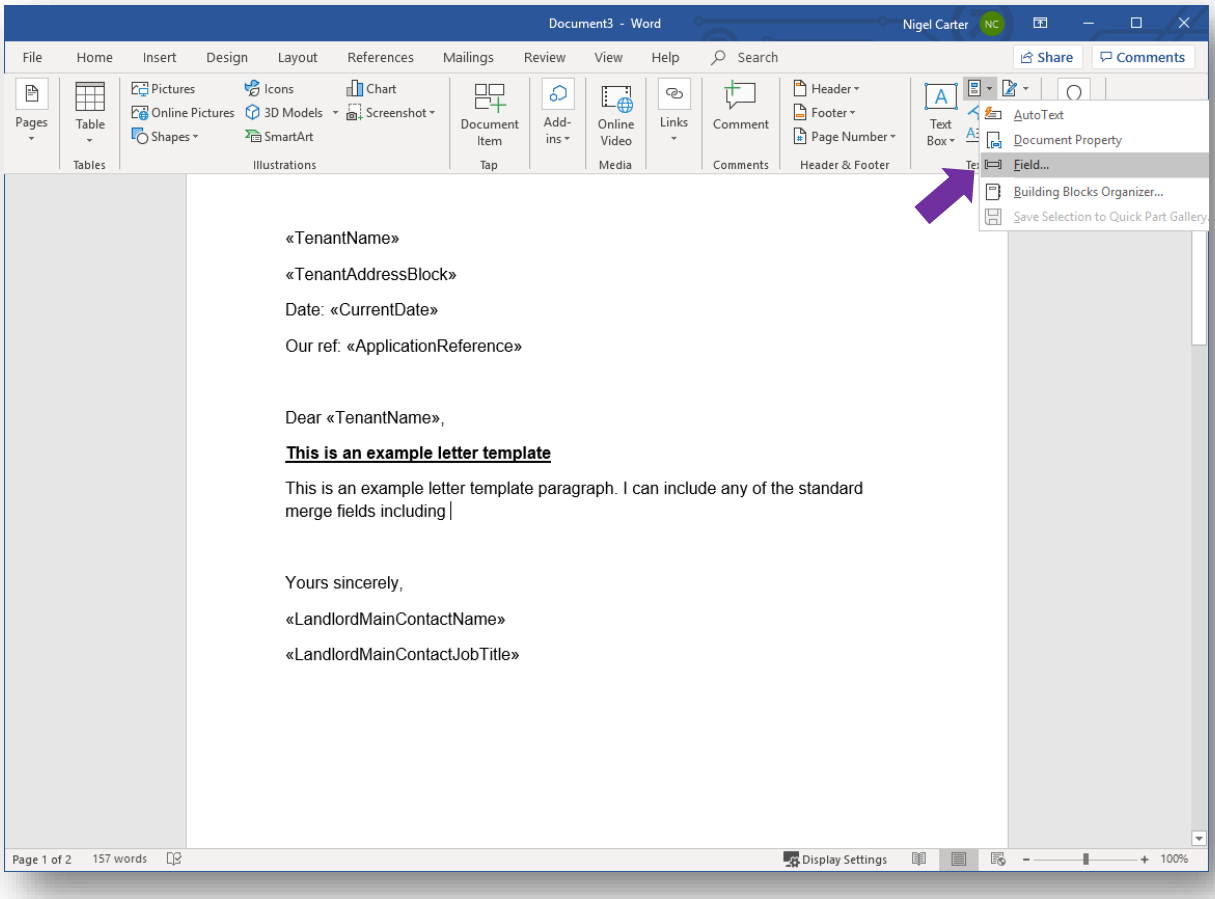
3. In the "Insert" sub-menu that is shown, click on the "Quick Parts" tool:



4. A list of options will be shown:

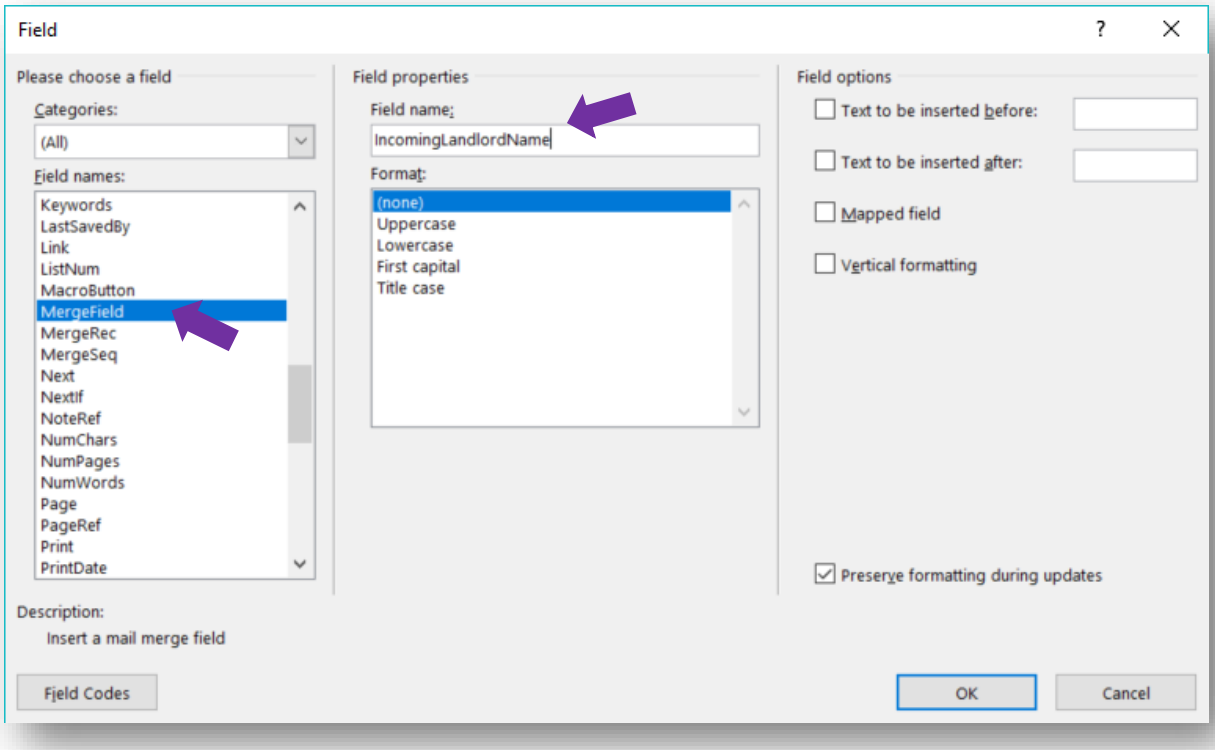


5. Click on "Field":

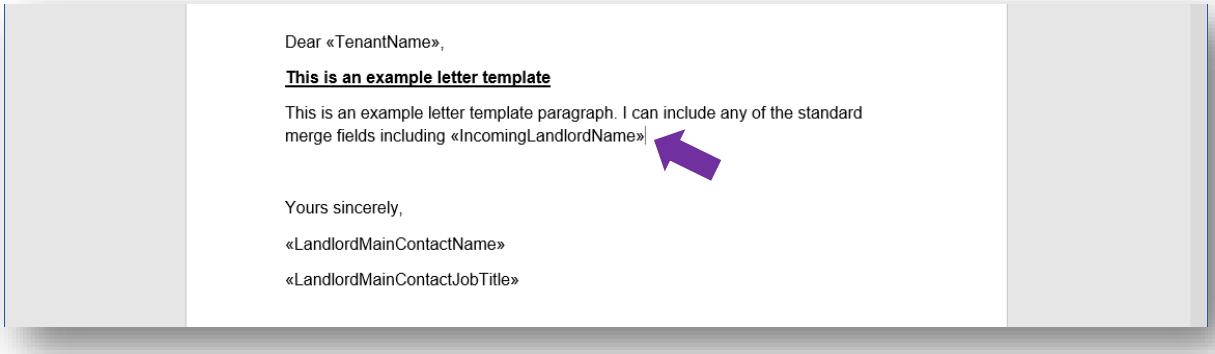


6. A box will now appear for you to enter details of the field you wish to insert.

- In the "*Field names*" list select "MergeField"
- In the "*Field name*" box enter the name of the SwapTracker merge field, e.g. "IncomingLandlordName". A full list of merge fields can be found in Appendix One – SwapTracker Merge Fields
- Click "Okay"

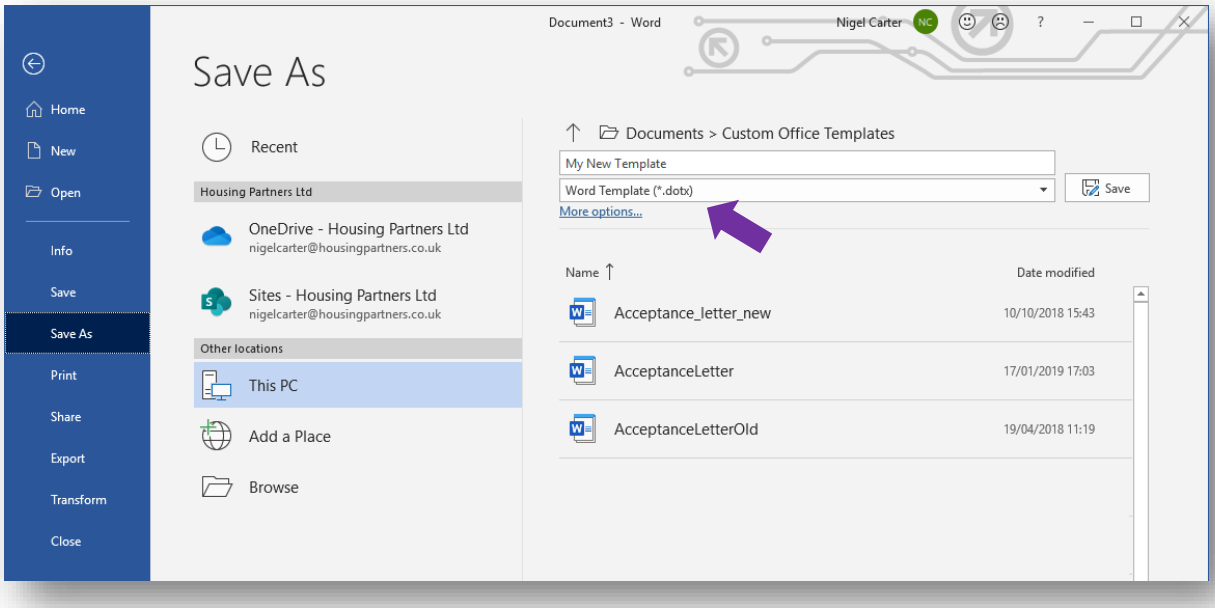


7. The merge field is now inserted in the document:



Later, when you use this template your merge field will automatically pull in the that information from the tenant's application, e.g. the incoming landlord's name:

8. When you have finished creating your template click "Save" but make sure it is saved as a **"Microsoft Word Template (.dotx")**

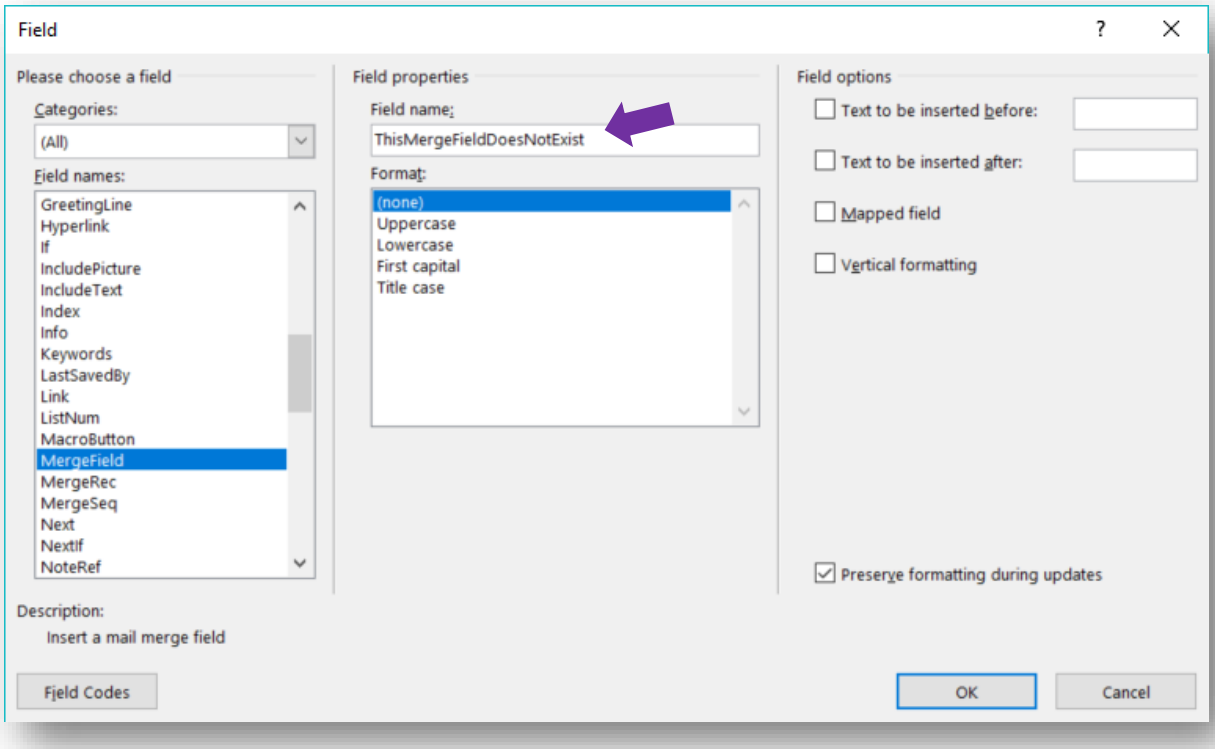


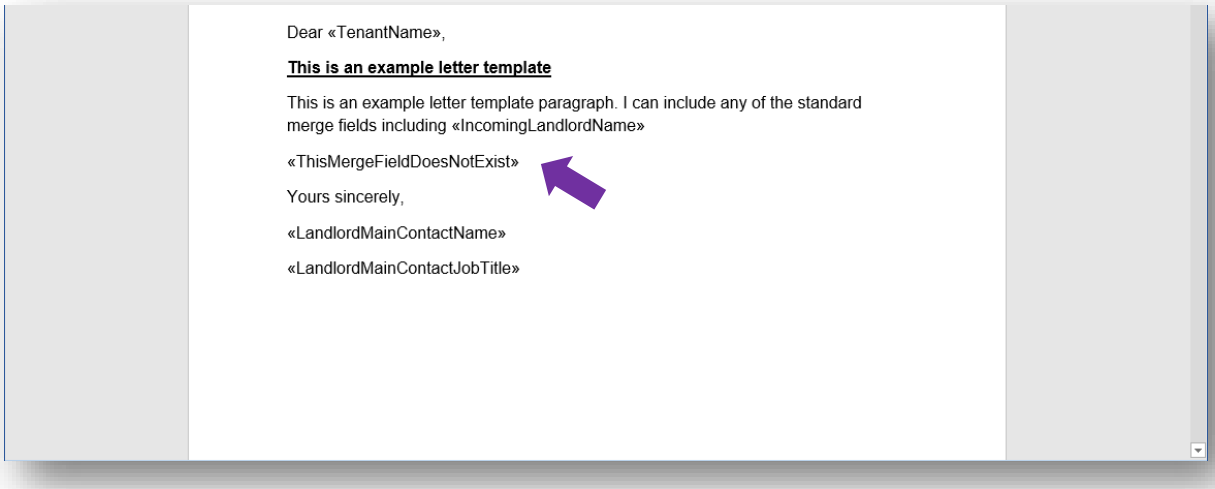
Adding your own merge fields

As well as the standard merge fields (Appendix One – SwapTracker Merge Fields) that are automatically populated, you can also add your own in any letter template.

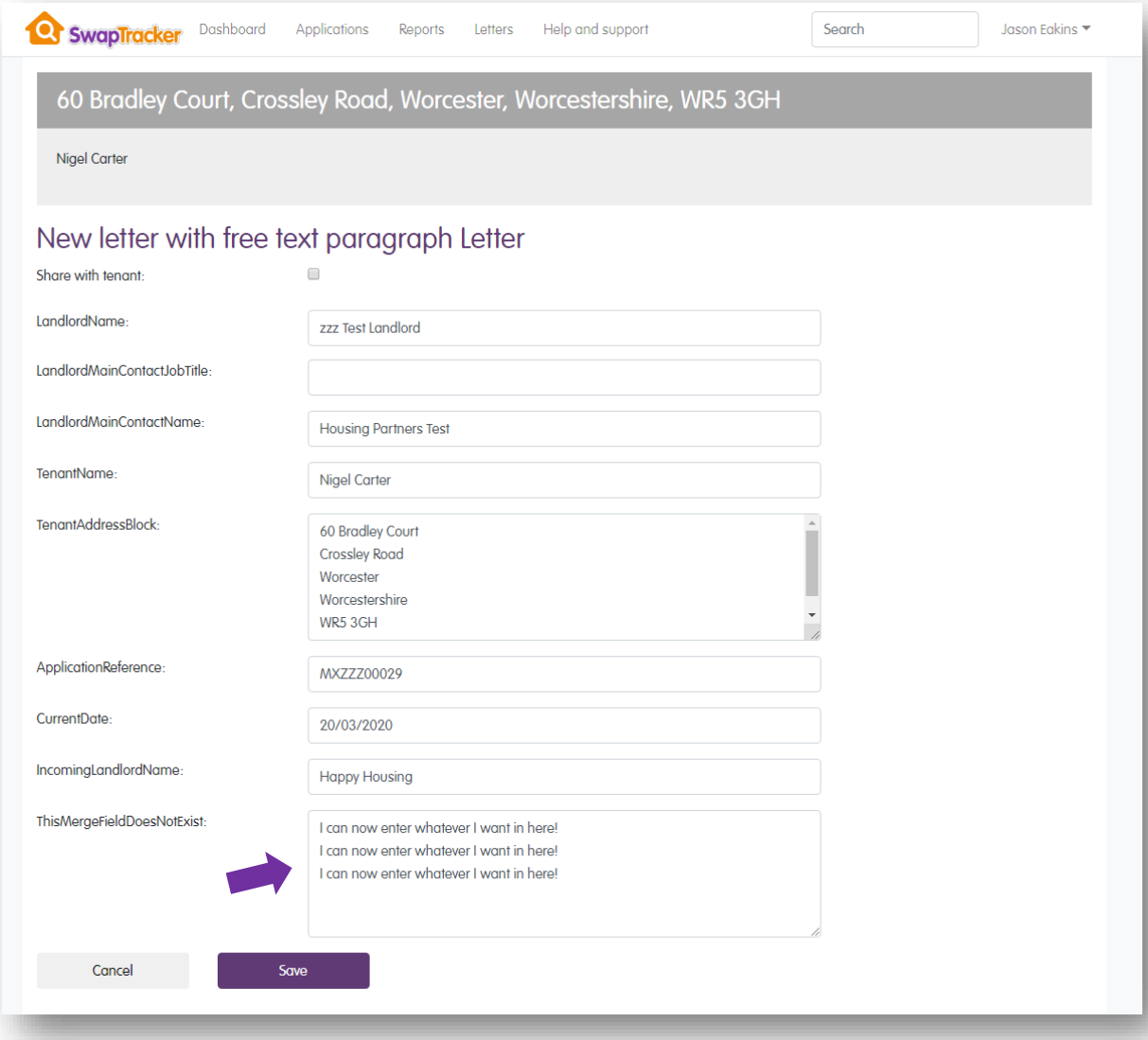
These will not be automatically populated with information from the application but are very useful if you have letters where you need to change the content of some paragraphs every time you create the letter.

In the example below, a merge field is inserted in the letter template called "*ThisMergeFieldDoesNotExist*"

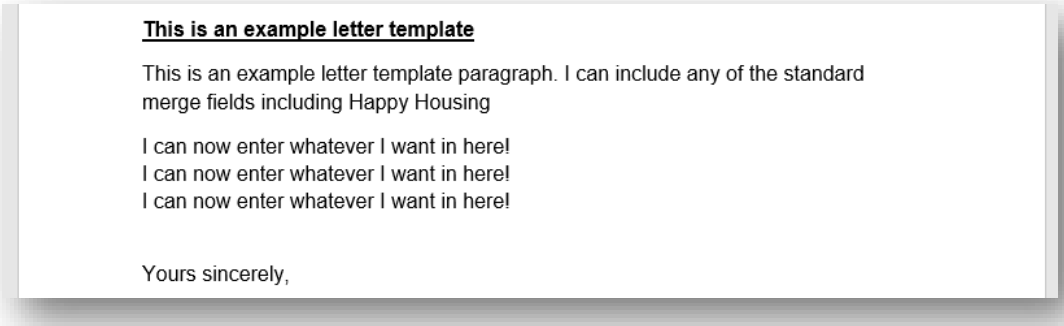




Now, when we generate this letter for any SwapTracker application the custom merge field "*ThisMergeFieldDoesNotExist*" allows us to enter any text we want…



…and the letter that is created includes this text:



This is an example letter template

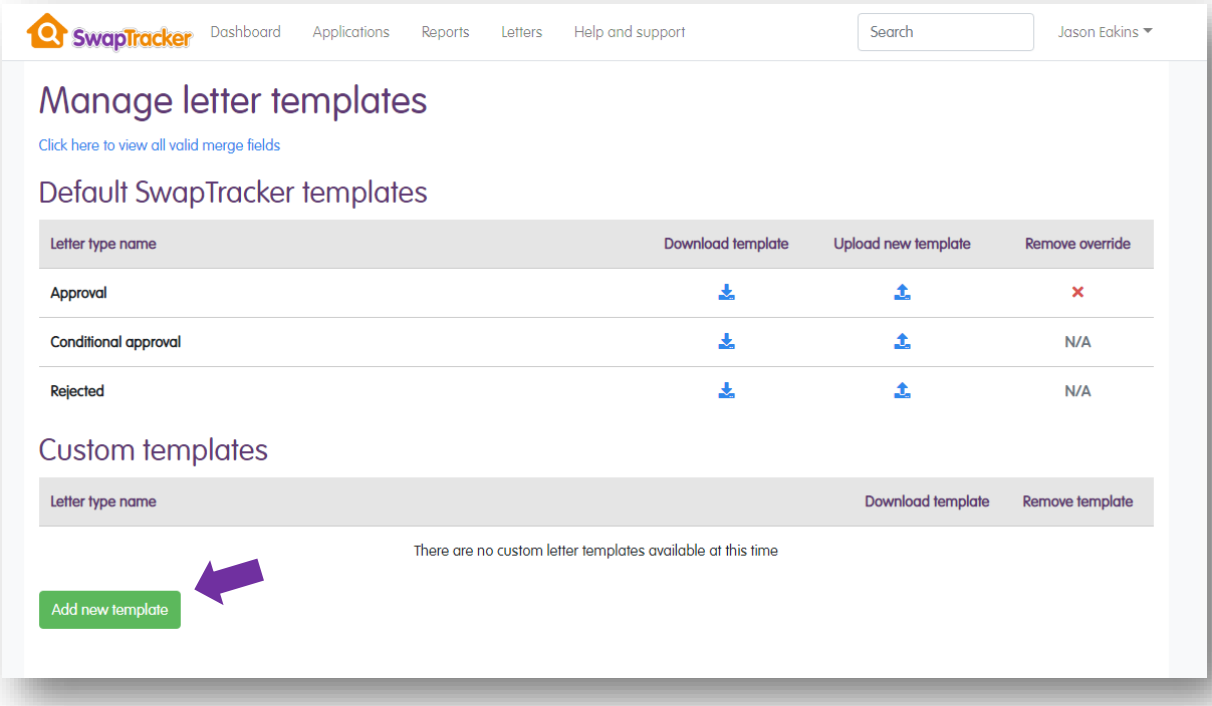
This is an example letter template paragraph. I can include any of the standard merge fields including Happy Housing

I can now enter whatever I want in here!
I can now enter whatever I want in here!
I can now enter whatever I want in here!

Yours sincerely,

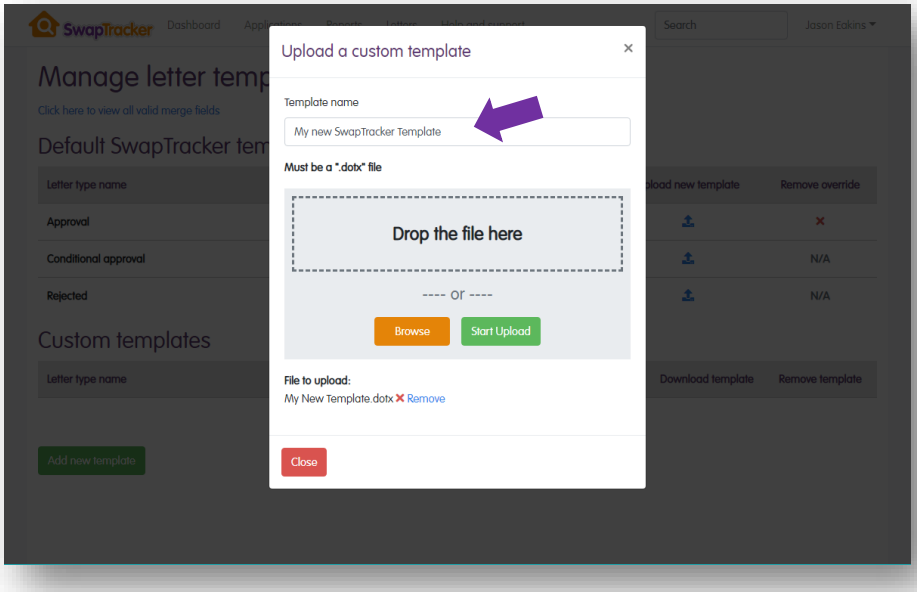
Uploading your template

To upload your template, go to the "Letters" section and click on "*Add new template*".

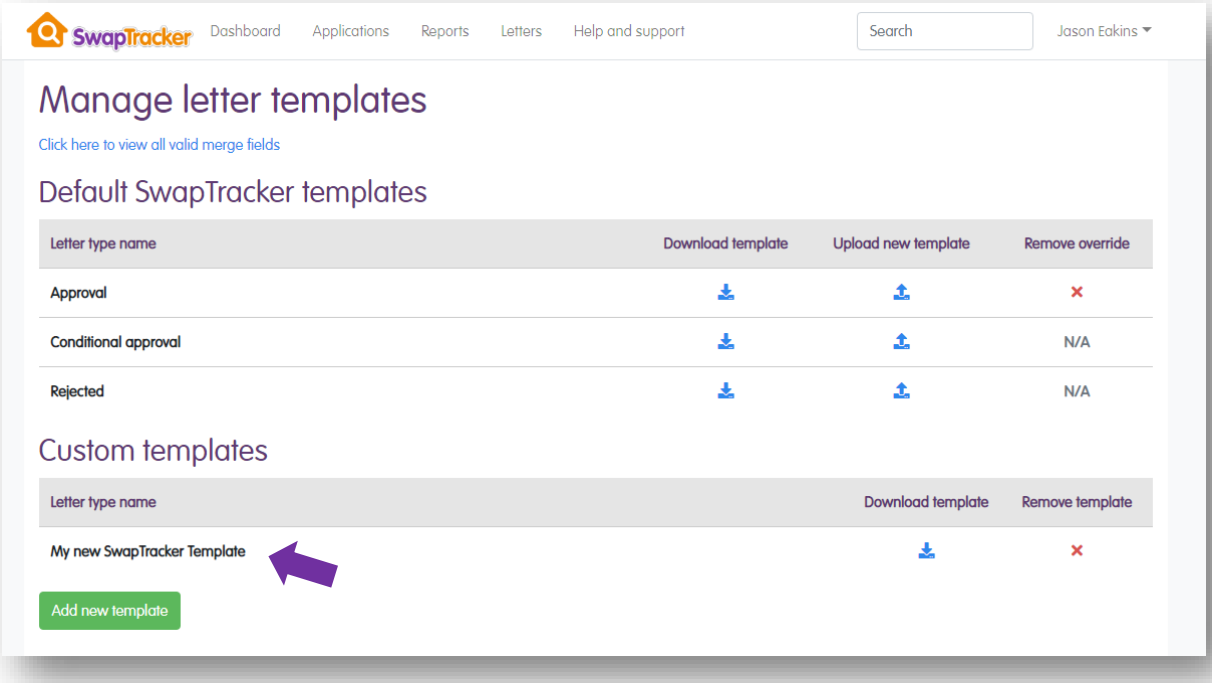


You will now be prompted to provide a name for your template. Choose something short but helps describe the letter type. This name will appear in future lists of your letters so should be easily identifiable.

Next, click "Browse", select your ".dotx" file on your device and then click "Start upload" to upload the new template:

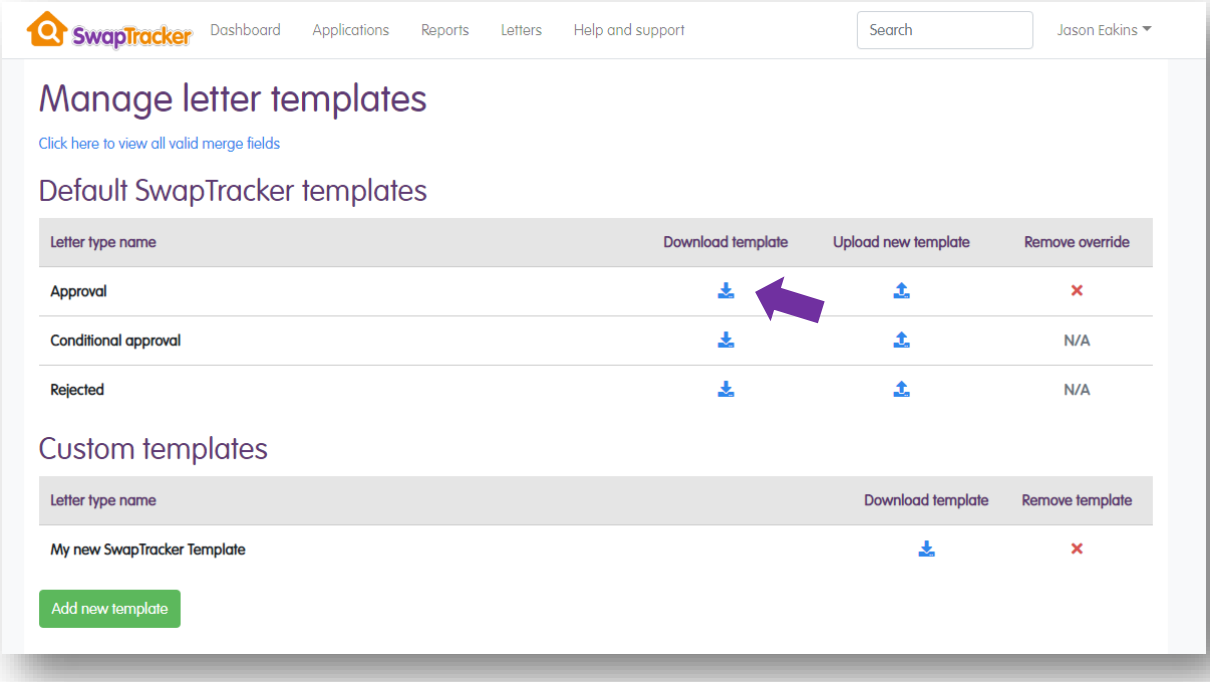


Your new template will now have been uploaded to your "*Custom templates*" and is ready to use!



Amending a template

To amend an existing template (including the standard Approval, Conditional Approval and Rejected letters that come with SwapTracker), first download the template you want to change by clicking the icon next to it:



With the template opened in Microsoft Word, make your changes to the text by editing the document.

Please note: you can also change fonts, formatting and even add images.

You can also add "Merge Fields" (e.g. to include the tenant's name or something specific to the application or your organisation).

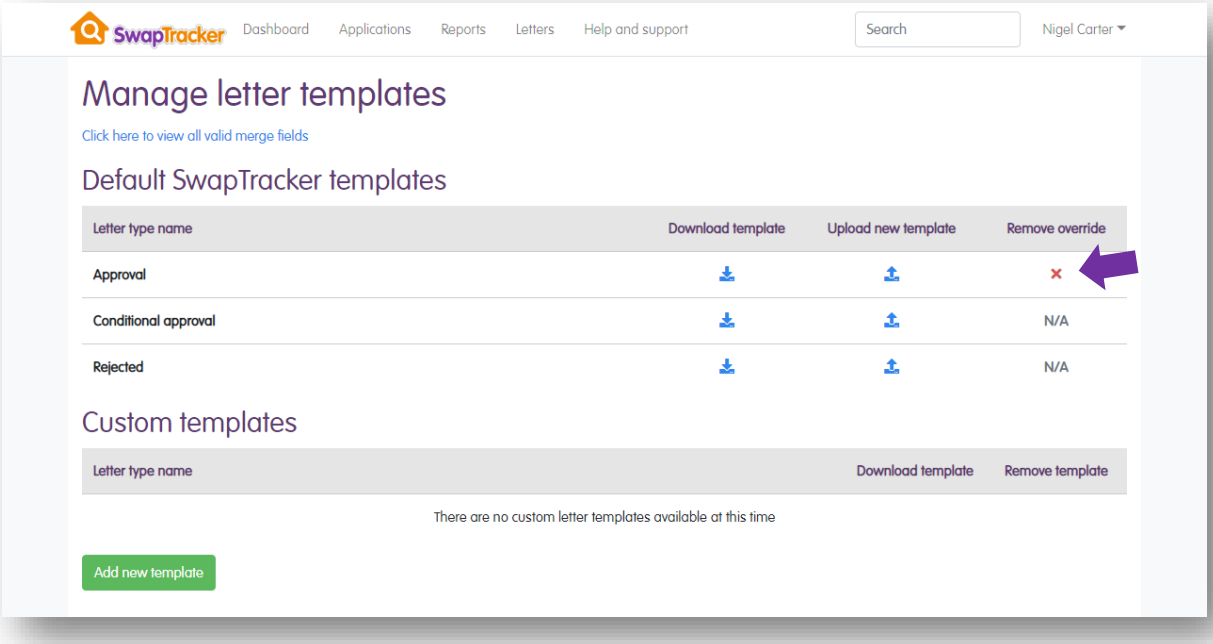
For full details on amending templates in Microsoft Word and adding merge fields, please refer to Adding your own templates

When you have finished changing the template, save the amended document. Remember – the template must always be saved as a **Microsoft Word Template ("**.dotx**") file.**

Finally, to re-upload the amended version, click the "*Upload*" icon ( ) next to the template in SwapTracker.

You will now be prompted to select your new template and upload it.

If you are changing one of the default templates, a red cross will appear to indicate that you have overridden the original standard version with your own.

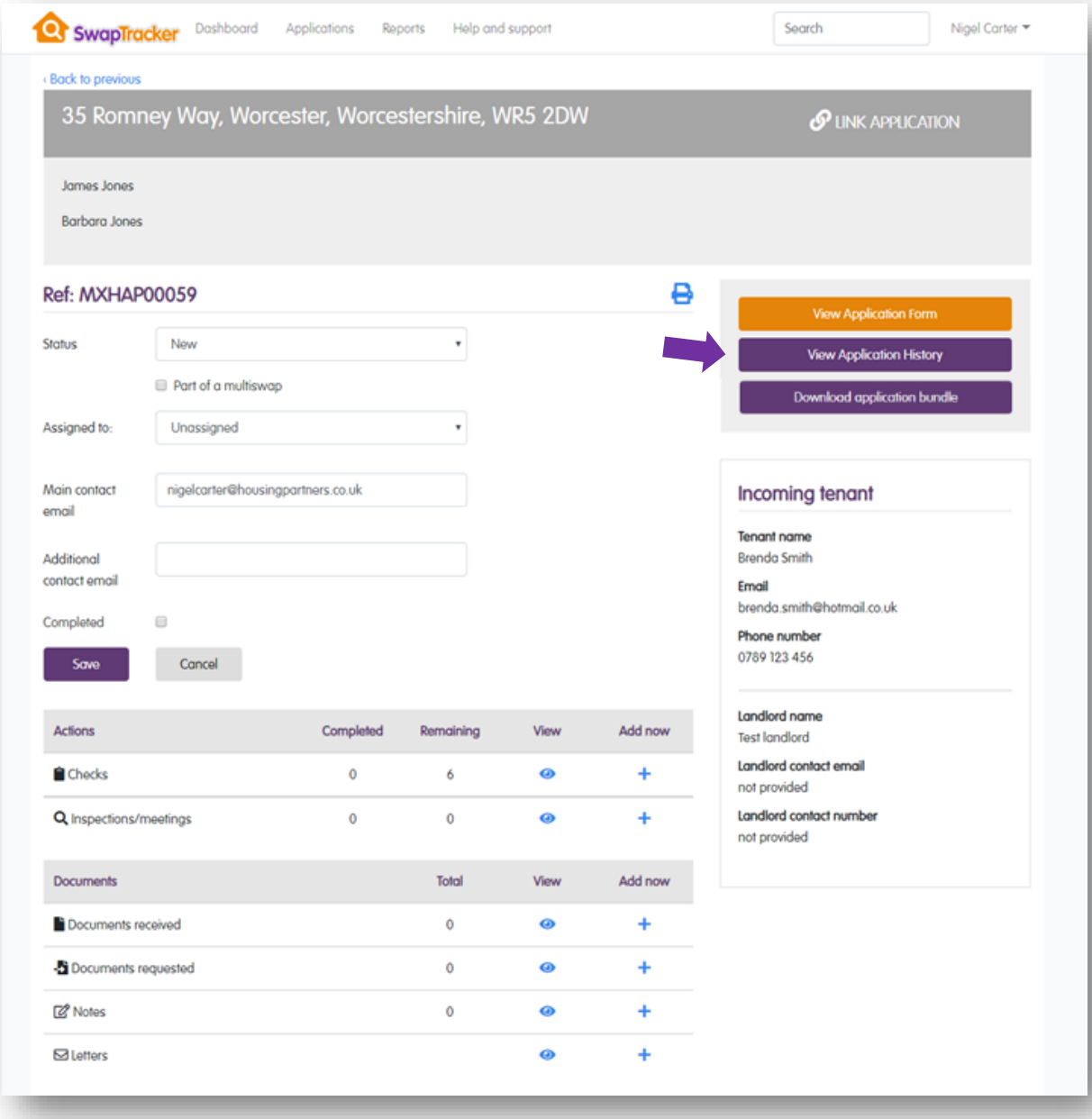


If you ever need to revert to the original template, simply click that red cross to remove the override.

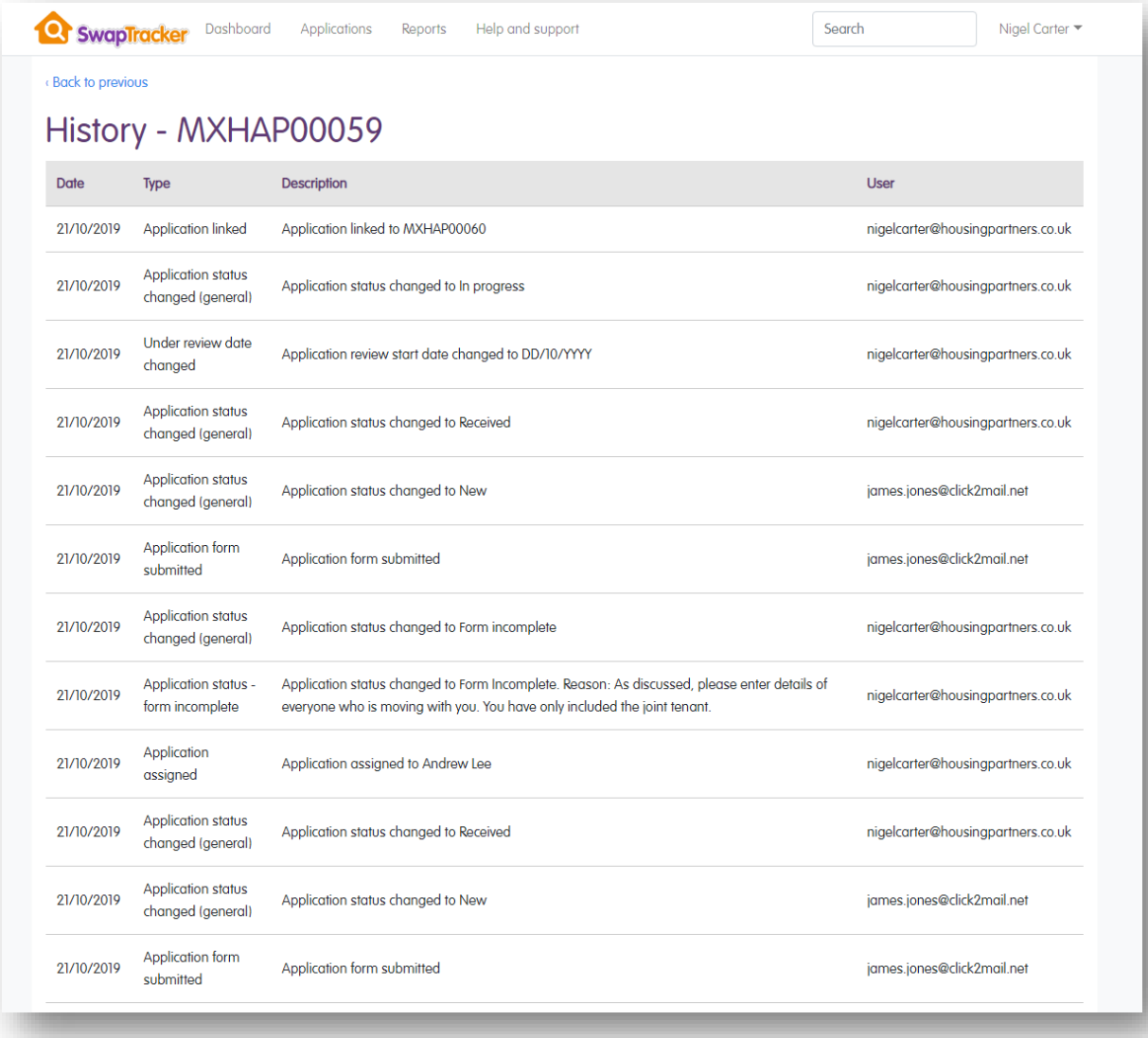
APPLICATION HISTORY

A complete history of all events relating to an application (including who performed the action) is shown in the "*History*" section.

This is accessed by clicking the "*View Application History*" button on the Application Summary page.



The History list shows all the key events for the application, the date they occurred and the user who performed them.



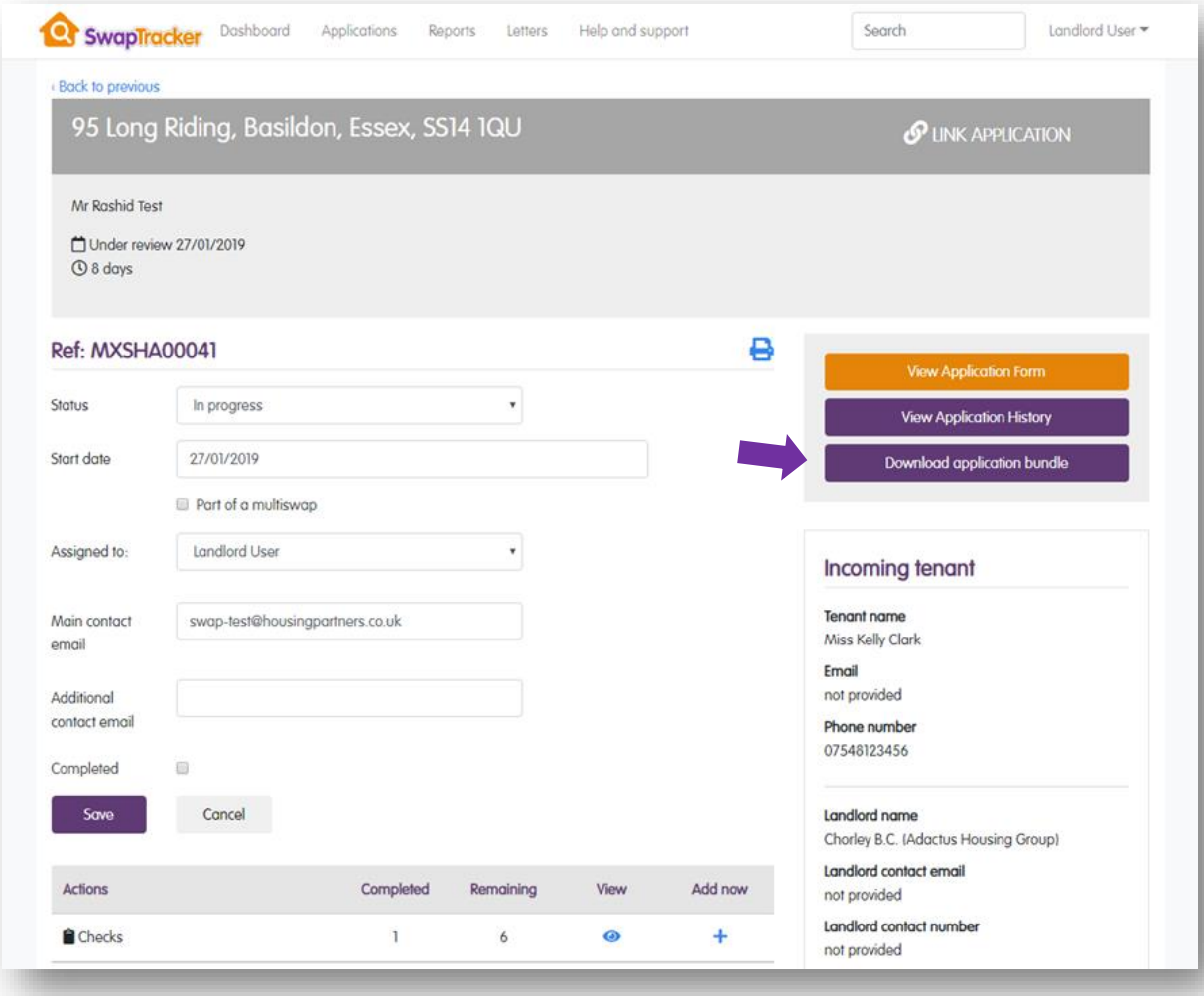
Date	Type	Description	User
21/10/2019	Application linked	Application linked to MXHAP00060	nigelcarter@housingpartners.co.uk
21/10/2019	Application status changed (general)	Application status changed to In progress	nigelcarter@housingpartners.co.uk
21/10/2019	Under review date changed	Application review start date changed to DD/10/YYYY	nigelcarter@housingpartners.co.uk
21/10/2019	Application status changed (general)	Application status changed to Received	nigelcarter@housingpartners.co.uk
21/10/2019	Application status changed (general)	Application status changed to New	james.jones@click2mail.net
21/10/2019	Application form submitted	Application form submitted	james.jones@click2mail.net
21/10/2019	Application status changed (general)	Application status changed to Form incomplete	nigelcarter@housingpartners.co.uk
21/10/2019	Application status - form incomplete	Application status changed to Form Incomplete. Reason: As discussed, please enter details of everyone who is moving with you. You have only included the joint tenant.	nigelcarter@housingpartners.co.uk
21/10/2019	Application assigned	Application assigned to Andrew Lee	nigelcarter@housingpartners.co.uk
21/10/2019	Application status changed (general)	Application status changed to Received	nigelcarter@housingpartners.co.uk
21/10/2019	Application status changed (general)	Application status changed to New	james.jones@click2mail.net
21/10/2019	Application form submitted	Application form submitted	james.jones@click2mail.net

APPLICATION DATA EXTRACT ("BUNDLE")

A full data extract of all information related to an application (including Documents and Letters) can be downloaded from SwapTracker.

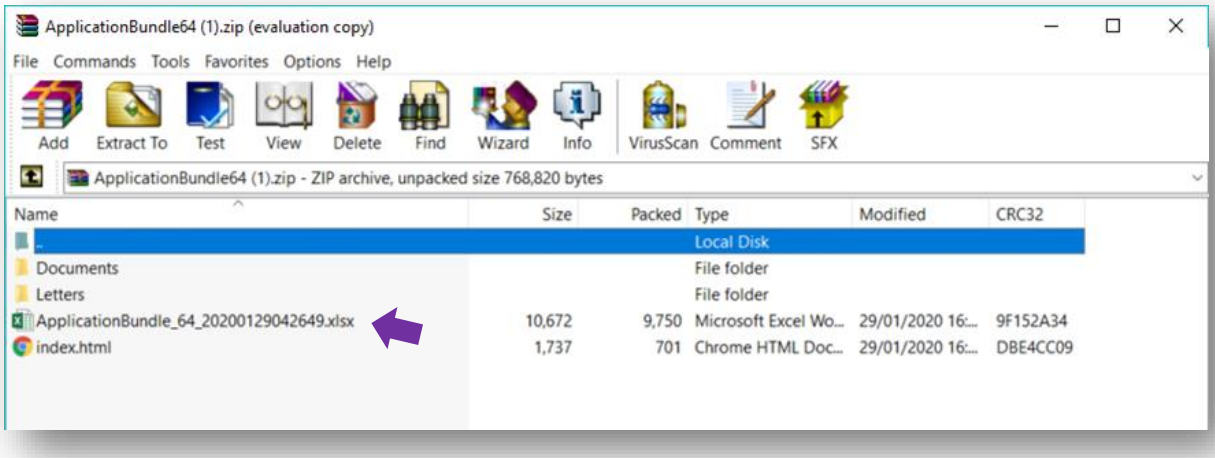
This can be used for attaching to a tenancy created in your Housing Management system or for a GDPR data access request.

This is downloaded by clicking the "*View Application bundle*" button on the Application Summary page.

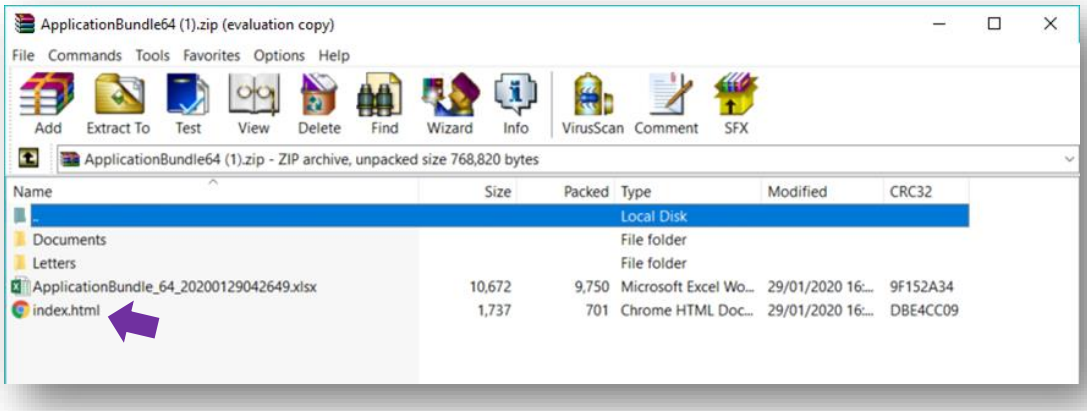


The "data bundle" downloaded comes in the form of a "ZIP" file.

This includes an Excel file which includes all the information against the application as well as the answers given on the application form.

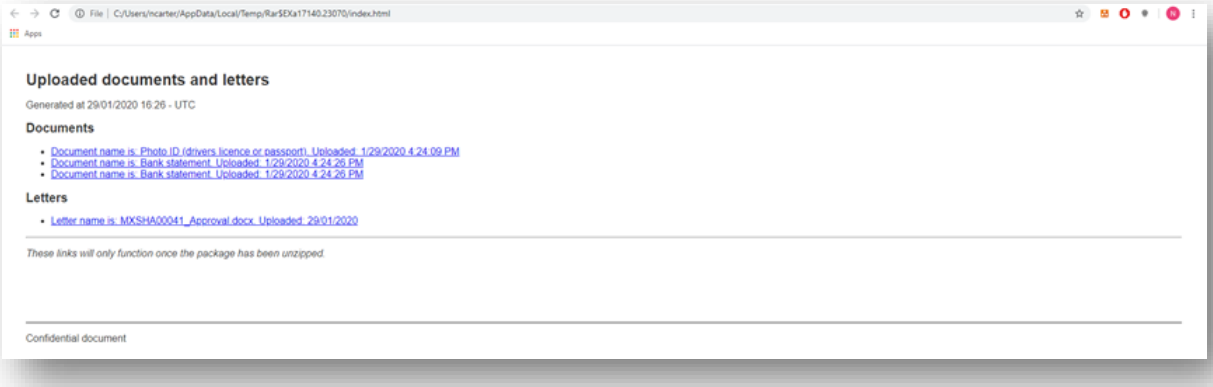


The bundle also includes an "index.html" file.

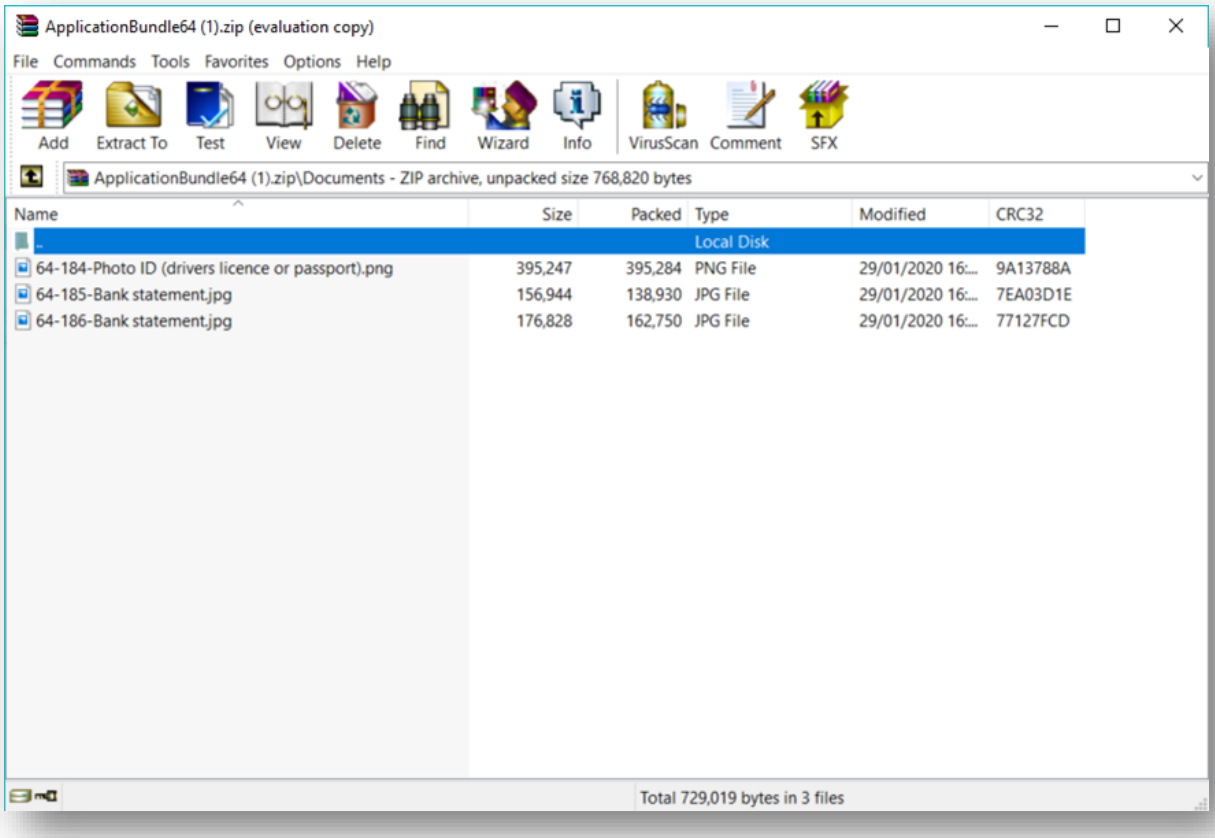


Opening this gives you a list of the document and letter files in the extract.

Click on any of these links to open the actual file.



Alternatively, simply click into one of the directories ("Documents" or "Letters") to see the list of files, e.g.



REPORTING

The Reports section is accessed by clicking the "*Reports*" link in the SwapTracker header bar.

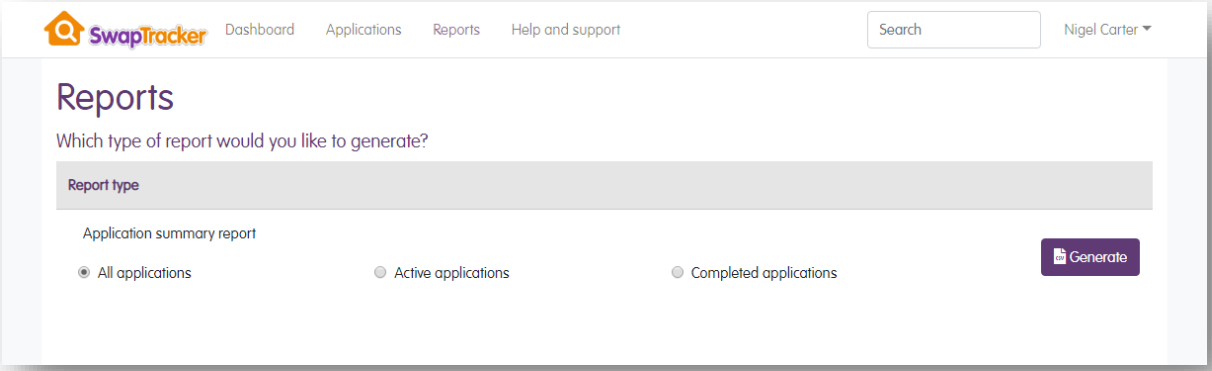
Application summary report

There are 3 options you can choose:

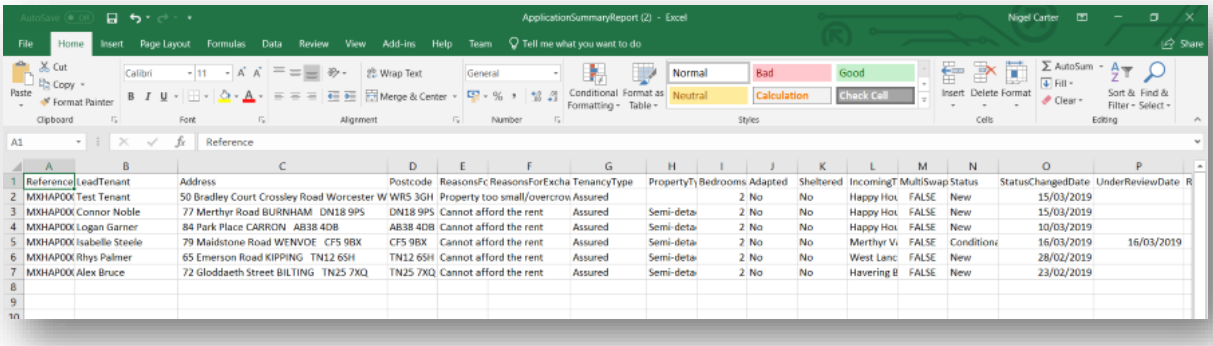
1. All applications – this returns all applications regardless of their status (excluding deleted)

2. Active applications – this returns only applications that are in progress

3. Completed applications – this returns only complete applications (see Setting an Application to Complete)



This generates a report of all your applications including the number of days taken to make the final decision (if applicable).



Reference	LeadTenant	Address	Postcode	ReasonsFc	ReasonsForExcha	TenancyType	PropertyTy	Bedrooms	Adapted	Sheltered	IncomingT	MultiSwap	Status	StatusChangedDate	UnderReviewDate
MXHAP00(	Test Tenant	50 Bradley Court Crossley Road Worcester W	WR5 3GH	Property too small/overcrow		Assured		2	No	No	Happy Hou	FALSE	New	15/03/2019	
MXHAP00(	Connor Noble	77 Merthyr Road BURNHAM DN18 9PS	DN18 9PS	Cannot afford the rent		Assured	Semi-deta	2	No	No	Happy Hou	FALSE	New	15/03/2019	
MXHAP00(	Logan Garner	84 Park Place CARRON AB38 4DB	AB38 4DB	Cannot afford the rent		Assured	Semi-deta	2	No	No	Happy Hou	FALSE	New	10/03/2019	
MXHAP00(	Isabelle Steele	79 Maidstone Road WENVOE CF5 9BX	CF5 9BX	Cannot afford the rent		Assured	Semi-deta	2	No	No	Merthyr Vi	FALSE	Conditiona	16/03/2019	16/03/2019
MXHAP00(	Rhys Palmer	65 Emerson Road KIPPING TN12 6SH	TN12 6SH	Cannot afford the rent		Assured	Semi-deta	2	No	No	West Lanc	FALSE	New	28/02/2019	
MXHAP00(	Alex Bruce	72 Gloddaeth Street BILTING TN25 7XQ	TN25 7XQ	Cannot afford the rent		Assured	Semi-deta	2	No	No	Havering B	FALSE	New	23/02/2019	

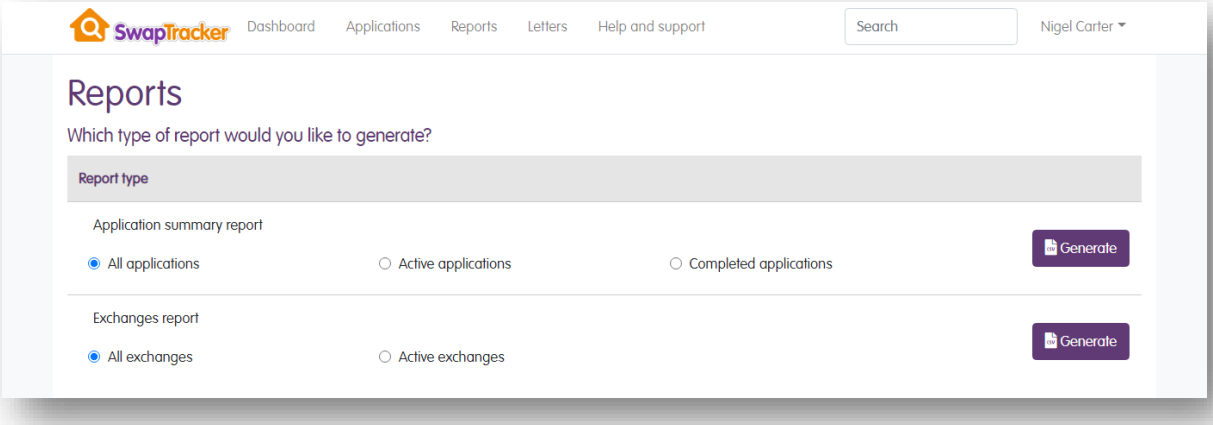
Exchanges report

The Exchanges report allows you report on the overall exchanges, not just individual applications.

There are 2 options you can choose:

1. All exchanges – this returns all your exchanges

2. Active exchanges – this returns only exchanges that do not have any applications in them which have been set to "complete".



This generates a report of your exchanges, including details of the applications they include as well as any "placeholders".

See Linking Applications / Multiswaps for more details.

The fields in the report are:

- Exchange name
- Date Created

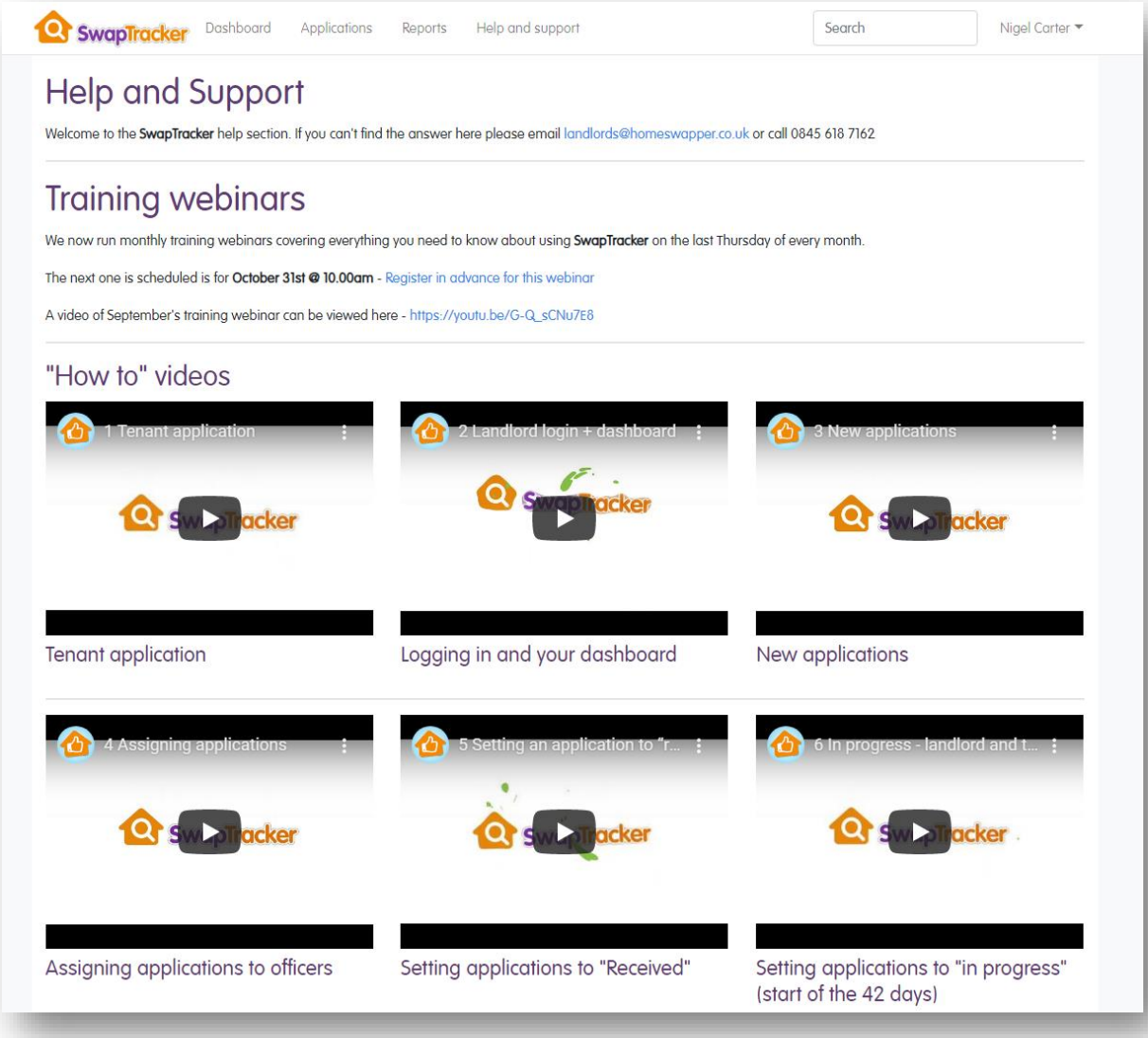
The following is then repeated for each application in the Exchange:

- Reference, i.e. application reference or "PLACEHOLDER"
- Application status
- Main tenant name
- Joint tenant name
- Property address
- Property, i.e. Number of bedrooms + Property type
- Landlord name
- Landlord contact email
- Landlord contact phone

Note: the report only shows the first **10** links. If an exchange contains more than 11 links, 11 onwards are not included.

HELP & SUPPORT

The SwapTracker "*Help and support*" area contains contact details for our dedicated Customer Support team, the SwapTracker User Guide, links to our monthly Training Webinar and other helpful resources.



APPENDIX ONE – SWAPTRACKER MERGE FIELDS

Listed below are the standard merge fields which when included in your letter templates will be automatically populated with the details from the application.

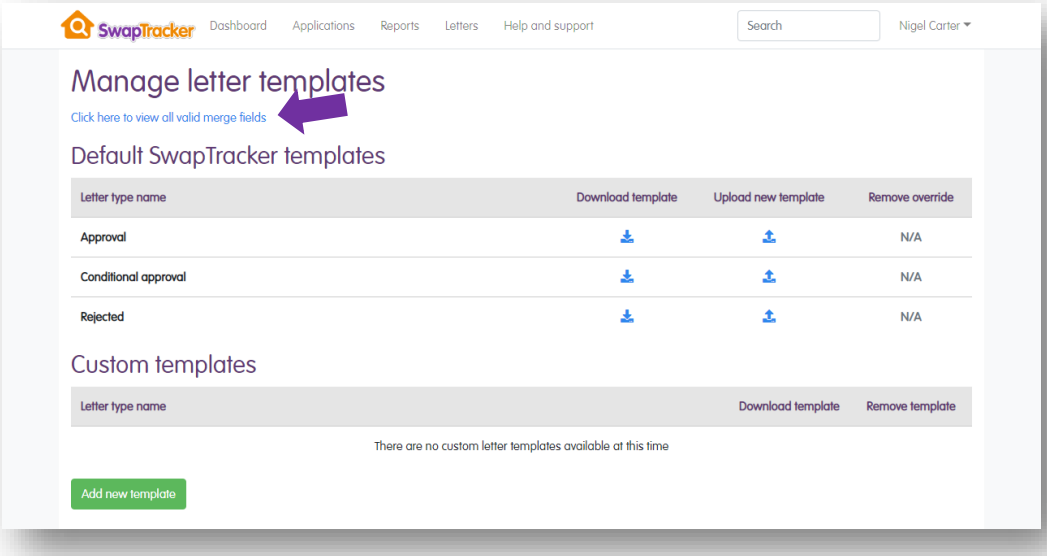
Merge field	Description
General Application Information	
ApplicationReference	The SwapTracker MX application reference number
ApplicationStatus	The status of the application, e.g. In progress, Approved, etc.
ApprovalConditions	Any conditions attached to the approval (applies only to Conditionally Approved applications)
AssignedOfficerName	The name of the person assigned to the application.
RejectionReason	Reason the application has been rejected (applies only to Rejected applications)
TenancyStartDate	Tenancy start date (applies only to Conditionally Approved and Approved applications) - dd/mm/yyyy format
DeadlineForDecisionDate	The date a decision is due by - dd/mm/yyyy format
ContactEmail	The contact email for the application.
TenantLandlordName	The name of the applicant's landlord.
TenantLandlordAddress	The address of the applicant's landlord (in one line)
TenantLandlordAddressBlock	The address of the applicant's landlord (in multiple lines)
Main Tenant Details	
MainTenantFirstName	The main tenant's first name.
MainTenantLastName	The main tenant's last name.
MainTenantTitle	The main tenant's title, e.g. Mrs, Mr, etc.
TenantAddress	The tenant's address (in one line).
TenantAddressBlock	The tenant's address (multiple lines).
TenantEmail	The tenant's email address.
TenantName	The tenant's full name.
TenantPhone	The tenant's phone number.
Joint Tenant Details	
JointTenantTitle	The joint tenant's title, e.g. Mrs, Mr, etc.
JointTenantFullName	The joint tenant's full name.
JointTenantFirstName	The joint tenant's first name.
JointTenantLastName	The joint tenant's last name.
Main + Joint Tenant Details	
TenantsFullNamesWithTitles	If there is no joint tenant this will be the main tenant's title, first name and last name only, e.g. *Mr Bob Smith* If there is a joint tenant this will be the main tenant's name **and** the joint tenant's, e.g. *Mr Bob Smith and Mr Barry Jones*
TenantSalutations	If there is no joint tenant this will be the main tenant's title and last name only, e.g. *Mr Smith* If there is a joint tenant this will be the main tenant's title and last name **&** the joint tenant's title and last name, e.g. *Mr Smith & Mr Jones*

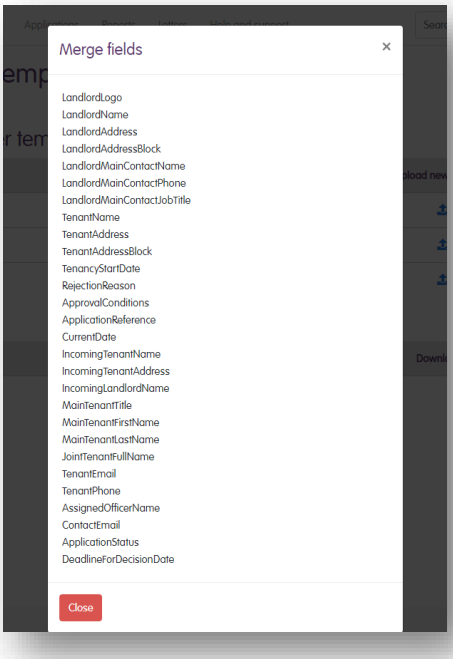
	If they both have the same last name, they will be combined e.g. *Mr & Mrs Davis*

Incoming Tenant Details	
IncomingLandlordName	The name of the landlord of the incoming tenant.
IncomingTenantAddress	The address of the incoming tenant (in one line).
IncomingTenantAddressBlock	The address of the incoming tenant (multiple lines).
IncomingTenantTitle	The title of the incoming tenant, e.g. Mrs, Mr, etc.
IncomingTenantName	The full name of the incoming tenant.
IncomingJointTenantTitle	The title of the incoming Joint tenant, e.g. Mrs, Mr, etc.
IncomingJointTenantFullName	The full name of the incoming Joint tenant.
IncomingJointTenantFirstName	First name of the incoming Joint tenant.
IncomingJointTenantLastName	Last name of the incoming Joint tenant.
IncomingLandlordAddress	The address of the incoming tenant's landlord (in one line).
IncomingLandlordAddressBlock	The address of the incoming tenant's landlord (multiple lines).
IncomingTenantsFullNamesWithTitles	If there is no incoming joint tenant this will be the incoming main tenant's title, first name and last name only, e.g. *Mr Bob Smith* If there is an incoming joint tenant this will be the incoming main tenant's name **and** the joint tenant's, e.g. *Mr Bob Smith and Mr Barry Jones*

Miscellaneous	
CurrentDate	Today's date - dd/mm/yyyy format
LandlordAddress	Your organisation's address (in one line).
LandlordAddressBlock	Your organisation's address (multiple lines).
LandlordMainContactJobTitle	The main contact for your organisation's job title.
LandlordMainContactName	The main contact for your organisation.
LandlordMainContactPhone	The main contact phone number for your organisation.
LandlordName	Your organisation's name.

As a useful reminder, a full list of SwapTracker merge fields available to use, can be viewed by clicking "*Click here to view all valid merge fields*".





APPENDIX TWO – TENANT REFERENCE FORM

Listed below are the questions asked in the tenant reference request form.

Tenant's household details

This section captures details of the tenant's household, i.e. anyone who will be moving with them.

This section is optional and by default we do not ask for this information.

If you do want this as part of your reference request form, please contact Housing Partners.

Tenancy/Property

Tenancy start date

Tenancy type

Property type

Number of bedrooms

Current weekly rent charged

Is the property specially adapted?

If Yes - Please give details

Are there any pets in the household?

If Yes - Please give details

Condition of property

Date of inspection

Tenant Details

Is the tenant in receipt of Housing Benefit or UC?

If Yes - Weekly amount received

If Yes - Please give details

Has the tenancy been conducted in a satisfactory manner?

If No - Please give details

Rent account status

Rent account balance

Has the tenant kept their rent account up to date in the past?

If No - Please give details

Has Succession Rights been used during the current tenancy?

Right to Buy / Right to Acquire Status

Do we consider any member of the household to be a Cautionary Contact?

If Yes - Please give details

Reports of Anti-social behaviour in relation to the tenant, household or visitors & details of this (if applicable)

Has a Notice of Seeking Possession been served?

If Yes - Please give details

Is there a current Notice served for rent arrears?

If Yes - Please give details

Is there a current Notice served for any other tenancy breach, e.g. anti-social behaviour / MAPA / RSO?

If Yes - Please give details

Other information

Please provide any other information relevant to the tenancy