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# Cx Housing

## Product Workshop

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# Agenda

- ▶ Save the date – Housing Community Day
- ▶ Information management module; supporting your GDPR journey
- ▶ Product vision & roadmap; tell us what you think
- ▶ Showcase of the new tenant portal & what's next
- ▶ Cx Contractor Workforce; overview and development update
- ▶ Cx Cases & Tasks; customer examples



## Save the date – Housing Community Day



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# Cx Information Management

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## Cx Information Management

Purpose:

**To provide Cx customers with the ability to easily control, process and manage data for both statutory and business requirements.**



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# Overview of Phase 1 Functionality

- ▶ Information Data Tags and Consent Types
- ▶ Manual recording when information has been shared with a third party
- ▶ Compliance dashboard view
- ▶ Standard Subject Access Request SSRS report
- ▶ Contact reference generation



# Consent Types

- ▶ Identify the rules relating to consent
- ▶ Can be assigned one or more Consent Category to allow for categorisation of consent to assist with viewing compliance
- ▶ Review configuration allows for rules to be defined relating to timescales for the consent to be reviewed

# Consent Type Configuration

13899

Orders

3600

Manage Queues

7

Authorise Invoices

Arrears Accounts

689

Cases and Tasks

0

Authorise Arrears Actions

4427

More Shortcuts

Logout

Home

Profile

civica

Default Functional U...

Contacts and assets search

Start Communication

New Case

Quick Menu...

Information Management Configuration

Save

Help

Menu

Dock

Close

Consent Types

Consent Outcomes

Information Data Tag Types

Information Data tags

New Consent Type

Consent Types

Menu

Companies	Description	Consent categories	Review calendar	Review period	Effective from	Effective to
Civica Housing	Internal use	Personal data, repairs data	All days, all hours	24 Months	Mon, 01 Jan 2017	
Civica Housing	Share with contractors	Repairs data, personal data	All days, all hours	24 Months	Mon, 01 Jan 2017	
Civica Housing	Share with Local Authority	Personal data	All days, all hours	12 Months	Mon, 01 Jan 2017	
Civica Housing	Special Purpose	Personal data, medical d...	All days, all hours	1 Months	Mon, 01 Jan 2017	

1

2

3

4

1 - 4 of 4

Consent Type

Help

Close

Description

Internal use

Companies

Civica Housing

Consent categories

Personal data, Repairs data

Review calendar

All days, all hours

Review period unit

Months

Review period

24

Effective from

Mon, 01 Jan 2017

Effective to

Confirm



# Information Data Tag Types

- ▶ Designed to be flexible to allow for usage for other purposes as well as Consent
- ▶ Can be assigned one or more Consent Types
- ▶ Can be assigned one or more Data Purposes to allow for identification of why data with an information data tag of this type is being held



# Information Data Tag Type Configuration

13899 Orders

3600 Manage Queues

7 Authorise Invoices

Arrears Accounts

689 Cases and Tasks

0 Authorise Arrears Actions

4427 More Shortcuts

**Information Management Configuration** Save Help Menu Dock Close

Consent Types Consent Outcomes **Information Data Tag Types** Information Data tags

**New Data Tag Type**

**Information Data Tag Types** Menu

Companies	Description	Consent types	Data purpose	Effective from	Effective to
Civica Housing	Personal identifiers	Internal use, Share with contractors,...	Tenancy Management, Repairs Ma...	Mon, 01 Jan 2017	
Civica Housing	Medical details	Internal use	Tenancy Management	Mon, 01 Jan 2017	

1 to 2 of 2

**CIVICA** Copyright Civica 2013 Information Management X

**Information Data Tag Type** Help | Close

Description **Personal Identifiers**

Companies **Civica Housing**

Consent type **Internal use, Share with Co...**

Data purpose **Tenancy Management, Rep...**

Effective from **Mon, 01 Jan 2017**

Effective to

**Confirm**

# Information Data Tag Types

- ▶ A way of grouping different data items to allow for rules to be applied to them
- ▶ Data items include:
  - Database columns
  - Contact reference types
  - Generic form fields
- ▶ Can be assigned one or more Information Data Tag Types



# Consent Outcomes

## ▶ 3 system consent outcomes

- Granted
- Refused
- Other

## ▶ Customers can then configure one or more outcomes for each system outcome to allow for local customisation of outcomes for consent recording



# Recording Contact Data Consent

- ▶ New Data Consent tile on Contact Details Form
- ▶ Multi select from configured Information Data Tags
- ▶ Select the consent type(s) applicable to the selected Information Data Tags for this content
- ▶ Record the Consent Outcome applicable for this Contact
- ▶ Record who provided the Consent Outcome
- ▶ Filters by Information Data Tag, Consent Type, Consent Category
- ▶ View Consent History and manage Consent Reviews

# Recording Contact Data Sharing

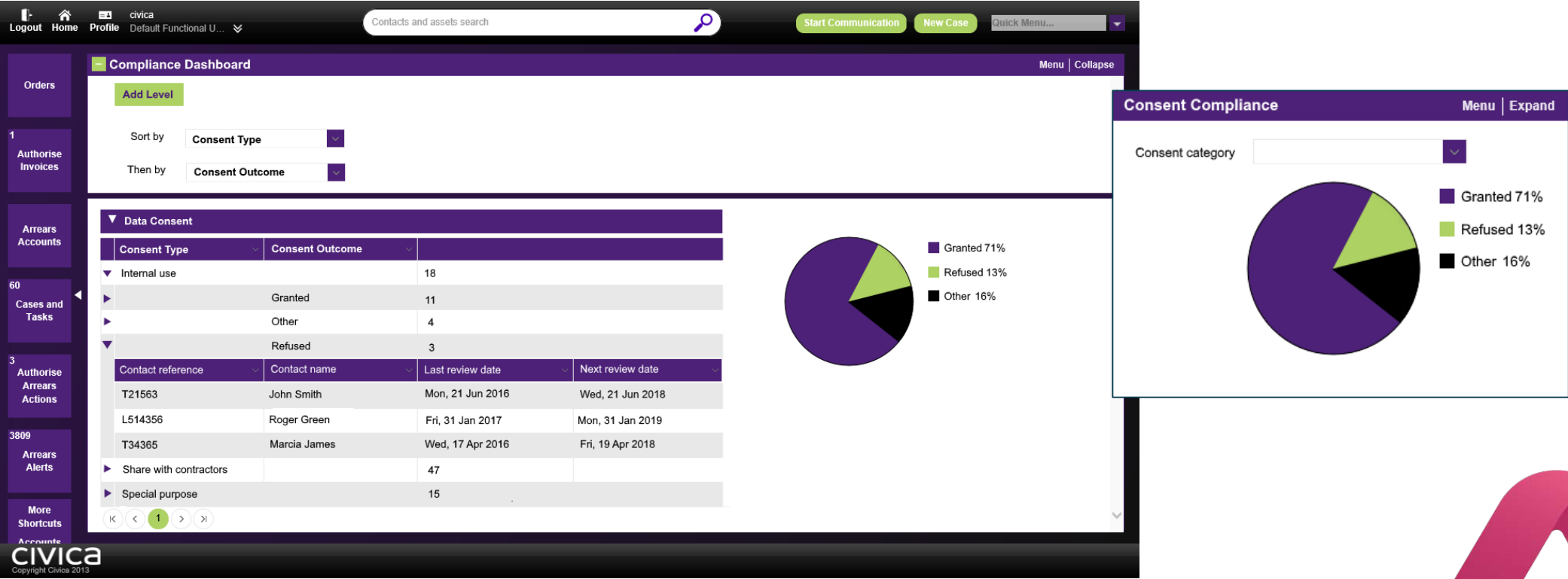
- ▶ New Data Sharing tile on Contact Details Form
- ▶ Initially allows for manual recording of when data has been shared
- ▶ Later phases will introduce some automatic recording of when data has been shared
- ▶ Records:
  - What has been shared – the Information Data Tags
  - Text summary of details shared
  - Who shared with
  - Reason shared
  - Date shared
  - Who shared the data

# Consent Compliance Dashboard

- ▶ Home Pane
- ▶ Initially provides high level information about overall data consent
- ▶ Pivot table style grid with variables for:
  - Data tag
  - Consent outcome
  - Consent category
  - Data purpose
- ▶ Expansion available within the grid to allow through application of multiple variables to ultimately reach a list of individual Contacts

# Consent Compliance Dashboard

\* Actual design subject to technical review





# Subject Access Request Report

- ▶ Standardised out of the box report configured using SSRS
- ▶ Allows for inclusion in a Communication Definition which could be combined with a case for automatic generation
- ▶ Alternative to standard would be define bespoke SSRS report in house or through Cx Consultancy

# Contact Referencing

- ▶ Allows for configuration and generation of contact references through Reference Number configuration
- ▶ For each contact created, a unique reference will be generated which will be a visible unique identifier for contacts within Cx



# Future Development

- ▶ Retention/Disposal/Archiving
- ▶ Redaction
- ▶ Pseudonymisation
- ▶ Right to Be Forgotten



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# Cx Roadmap

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# Cx Roadmap

## Purpose:

**Our vision is to provide the market leading digital Housing Management platform, enabling flexible and efficient working for partners and their customers. Accessible anytime, anywhere to provide exceptional customer service at the point of contact and target services through true customer insight.**



## PRODUCT ROADMAP SUMMARY FOR Cx Housing

ROADMAP	2017				2018				2019				2020			
Key Deliverables	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4	Q1	Q2	Q3	Q4
<b>Digital</b> 					Contractor Portal Phase 2											
						Statistical Arrears										
						System Wide Appointments Phase 2										
												Resident Involvement				
<b>Mobile</b> 																
<b>Integration</b> 																
<b>Analytics</b> 																
<b>Cloud</b> 																
<b>Automation</b> 																
<b>Compliance &amp; Enhancement</b> 																

# Cx Roadmap

## Q1 2018

### ► Information Management Phase 1

- See detailed section on Information Management

### ► Contractor Portal Phase 2

- Create/view statements & invoices
- Add attachments to repair entities
- Forgotten password / Change password process
- Add link to generic forms
- Ability to submit delays
- Make asbestos data available on order screen
- Alter variation and update status flows
- Add equipment grid to order screen

### ► Tenant Portal

- See detailed section on Tenant Portal – to be released incrementally



# Cx Roadmap

## Q2 2018

### ► ECT Home buy

- The enhanced cases and tasks functionality builds on the existing Cx Home Buy capabilities. It adds a graphical designer, decision based routing, conditional delays and a comprehensive notification capability. Organisations will be able to map their business processes to workflows built in Cx, providing them with automation of activities and true control of SLAs.

### ► Choice Based Lettings Integration

- This will build on the existing integration and provide a single source of data from both Cx Housing and Keystone to feed in to CBL software. Adverts can be more detailed as asset management information will be available as well as directly from Cx housing.
- Also enhancing the capability to use Cx as the source software for housing register applicants and for these to feed to Abritas. Following bidding outcomes offers and tenancies can then be created in Cx.



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# Cx Roadmap

## Q2 2018

### ► Generic forms Phase 2

- Calculated fields
- Conditional field logic
- CSS stylesheet styling
- More standard Cx fields
- Geolocation tagging
- Pages with groups /sections of questions
- Navigation within a form
- Offline form save / submission within a mobile app

# Cx Roadmap

## Q3 2018

### ► Income Plus

- Leveraging data to target specific accounts
- Better prioritisation of case load
- Integrated to cases and tasks for more complex arrears stages

### ► Homelessness Reduction Act

- The Act places a new duty on local authorities to help prevent the homelessness of all families and single people, regardless of priority need, who are eligible for assistance and threatened with homelessness. Following a gap analysis, it has been concluded that the flexibility of configuration within Cx can already provide for the proposed changes to processing. Amendments will be required to support new standard reporting and consultation with Department for Communities and Local Government is underway with the expectation of a schema being provided shortly.

Key Features:

- Statutory changes
- Build on existing flexible functionality



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# Cx Roadmap

## Q4 2018

### ► System Wide Appointments

- Add appointments to additional entity types:
  - Allocation Application
  - Match List
  - Allocation Offer
  - Case for all case based modules
  - Task for all case based modules
- Appointments building block for cases
- Updating repairs appointments so that they appear in the contact appointment tile.
- Contact Summary 360 tile for appointments
- Amendments to the appointments home pane
- Communications engine amendments
- CRM Script Action button for New Appointment



# Cx Roadmap

## Q4 2018

### ► ECT System Actions

- The new system action building block will deliver closer links between existing Cx functions including wizards and enhanced cases and tasks. This will save time for users when completing workflows and also deliver a powerful building block which can be given different purposes depending on customer requirements.

The types of system actions will be:

- Launch a Popup
- Launch a Form
- Process
- Stored Procedure
- Web Service
- And an example is ending a tenancy. As now it will be possible to build cases and tasks to manage the activities around the business process with the benefit of launching any forms or wizards needed at the appropriate point for the user to complete.
- Data completed earlier in a task path will also be available to inform the system actions, for example data is collected in a form and can then be used to update data in Cx.

# Cx Roadmap

## Q4 2018

### ► Cx Mobile

- Native Mobile application supporting iOS, Android and Windows Phone.
- Secure data storage and easy to use.
- Empowering users to work offline with key functionality
- Cx data set synchronisation for read only access
- Cx Form synchronisation
- Cx Workforce job management



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# CIVICA

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# Tenant Portal

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## Tenant Portal

Purpose:

**To provide a rich, engaging and intuitive platform which drives digital to become the 'method of choice' for customer interaction.**



# Tenant Portal Workshop

- ▶ Please connect to: <https://goo.gl/tAuUQE>
- ▶ Username: `julie.swift@civica-cx.co.uk`
- ▶ Password: `Tester123!`





# Tenant Portal – future planned development

- ▶ Cancelling/Re-arranging appointments
- ▶ Viewing of communications
- ▶ Targeted campaign alerts – this could be used to provide specific updates to users in the tenant portal. Such as “We are aware there is a power cut in your area today” or “Did you know there is a resident’s open day near you next week?”
- ▶ Integration with Keystone to show Asset information. E.g. Planned Works
- ▶ Ability to push a form out to Tenant Portal as part of an ECT path

# Tenant Portal – future planned development

- ▶ Non-tenant functionality. E.g. Reporting of ASB
- ▶ Payment service integration/Direct Debits
- ▶ Additional security such as allowing limited read-only access to non-responsible tenants
- ▶ User interface for configuration / administration
- ▶ Ability to set Tenant Portal as a communication preference



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# Cx Contractor

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# Contents

- ▶ Rationale
- ▶ Cx as a framework
- ▶ Overview of features
- ▶ Next steps

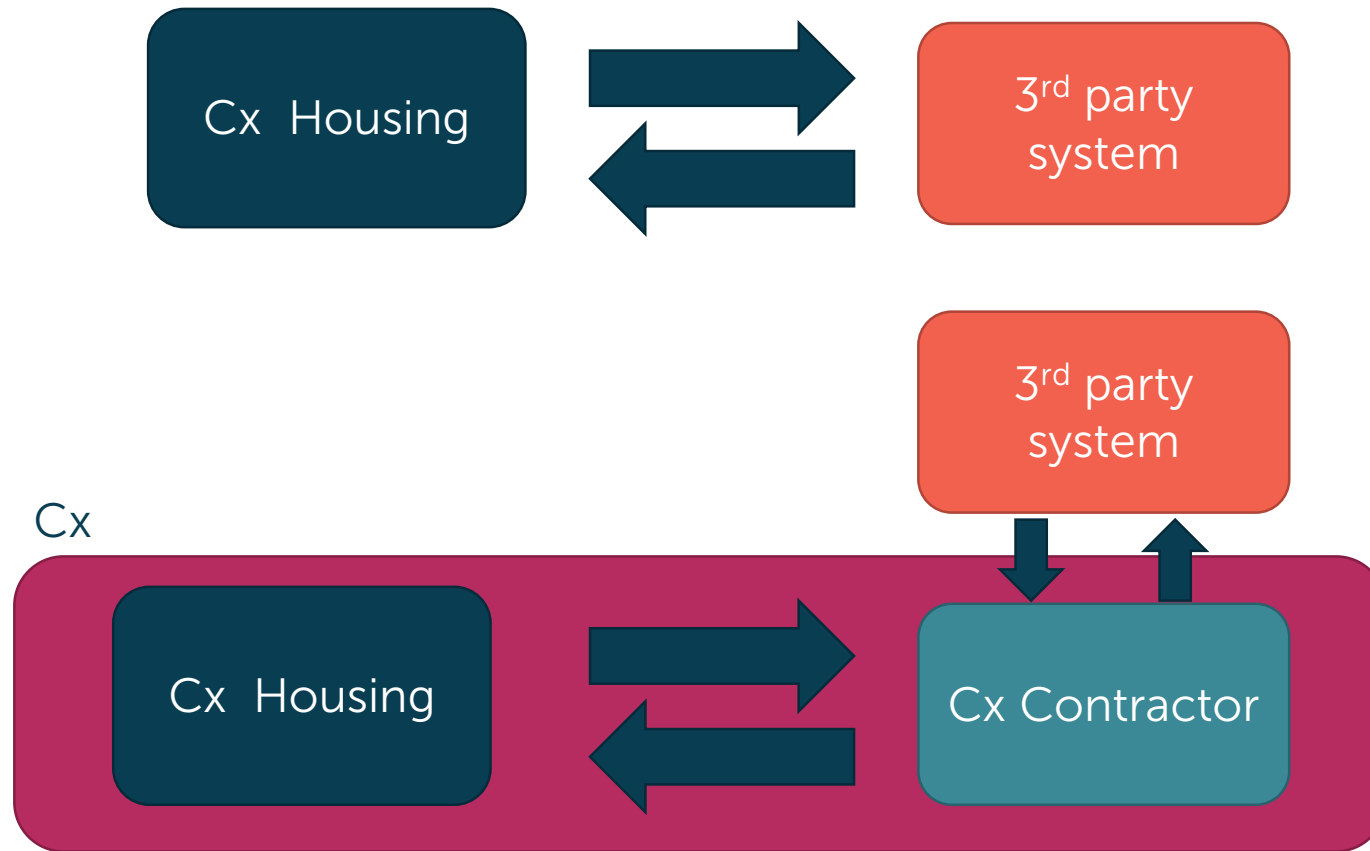


# Cx Contractor Rationale

- ▶ Cx Housing provides 'Client side' repairs module
- ▶ Extending the Cx family
- ▶ To provide operational repairs management
- ▶ Seamless integration between Cx Housing and Cx Contractor



# Cx Contractor Rationale

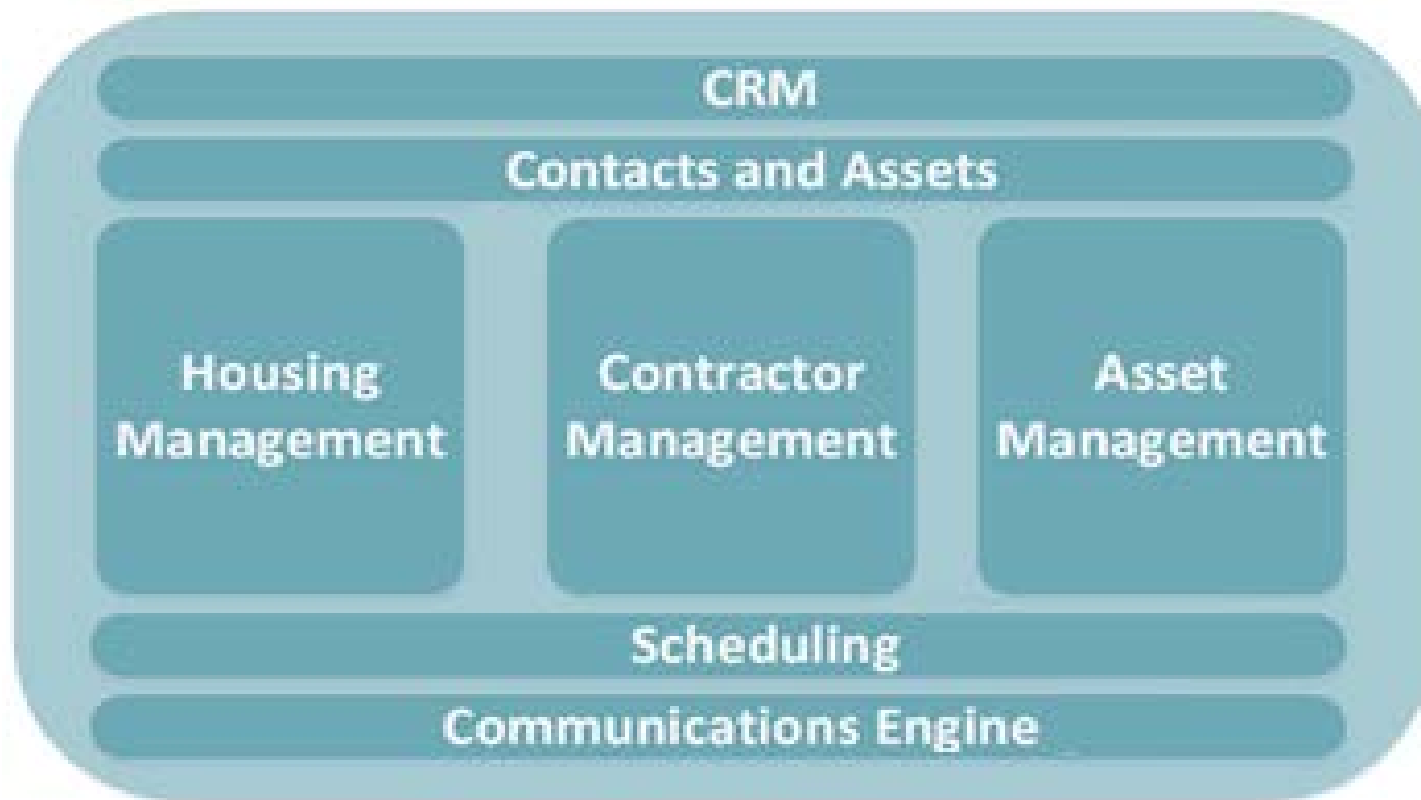


# Cx as a Framework

- ▶ Build on Cx development to date
- ▶ Leverage and benefit from core modules:
  - Comms Engine
  - Forms Engine
  - Security
  - Contacts & assets
  - CRM
- ▶ Cohesive look and feel



## Cx as a Framework





# Cx Contractor Overview & Features

- ▶ Modern contractor system
- ▶ Resource/Operative management
- ▶ Cx Scheduler – will be stand alone
- ▶ Materials & Store management
- ▶ Sub Contractor management
- ▶ Price Books & Cost catalogues



# Cx Contractor Overview & Features

- ▶ Web service API's for 3<sup>rd</sup> parties
- ▶ Job Costing
- ▶ Charging & invoicing
- ▶ Mobile



# Cx Contractor Next Steps

- ▶ Phase 1 : Mid 2018: Initial release, for use alongside Cx Housing including Cx Scheduler in an integrated environment
- ▶ Phase 2: Separate operation, for client/contractor split
- ▶ Phase 3: Large Multi client



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# Cases and Tasks In Use

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# Prospect Community Housing

## Rent Statement Generation

- ▶ Generic case that opens then automatically prints/sends a rent statement then closes
- ▶ Optimal route for users who do not routinely navigate to rent accounts



# Prospect Community Housing

## Small alteration approvals – where automatic approval is granted

- ▶ Individual generic case types for laminate flooring, outside taps, paving slabs, satellite dishes and garden sheds automatically generate permission and guidance communications and then close the case.
- ▶ The user doesn't need to do anything except create the case. This saves lots of time and they no longer need to record these on a spreadsheet.

# Prospect Community Housing

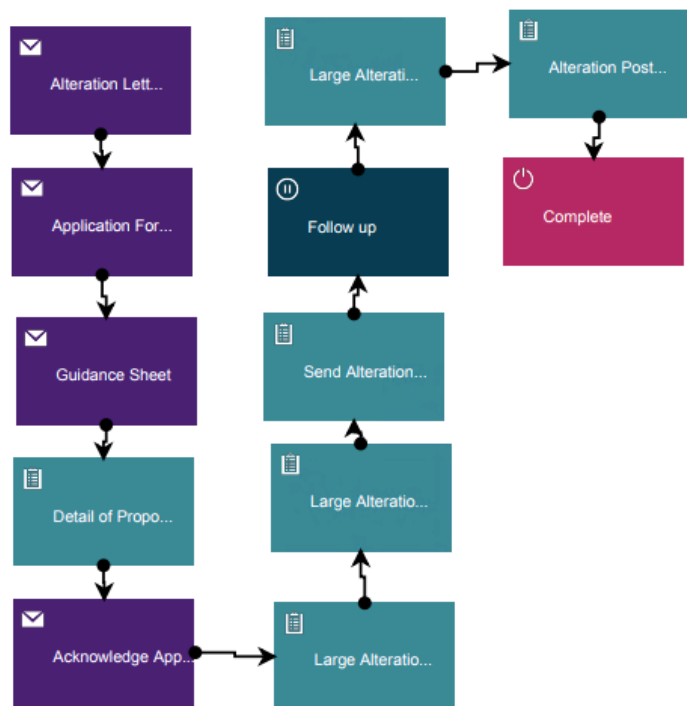
## Large alteration approvals

- ▶ A longer procedure within a generic case that is allocated to the repairs team.
- ▶ Includes all communications and delays built in to allow for applications to be returned.
- ▶ We no longer need to keep these on a spreadsheet and create mail merge documents for the letters and application forms.



# Prospect Community Housing

## Large alteration approvals



- ▶ Sends out alteration Letter, Application Form and Guidance Sheet
- ▶ Prompts user to record details of application as a case note
- ▶ Sends acknowledgement letter
- ▶ Leads repairs team through inspection and issue of permission
- ▶ Delay of 8 weeks to carry out work
- ▶ Post inspection
- ▶ Automatic case completion



# Prospect Community Housing

## Call back Requests

- ▶ Due to size of organisation it is possible to have individual Generic Case Types set up for a call back for each user
- ▶ The case type is allocated to that user and is for a Contact Entity. The contact requiring the call back is selected as the case entity.
- ▶ The path has a 5 minute delay before sending a communication to the case owner to notify them they have a call back
- ▶ Details of the request are included in the case notes.

# Prospect Community Housing

## Call back Requests

Create Generic Case - Select Case Type Help | Close

Company Prospect Community ...

Case type leigh Enter Category, Case Type or Keywords

▼ Search Results Menu

Category	Case type	Information	Entity type
Call Back	Leigh Call Back	Leigh Please Call Back	Contact

1 - 1 of 1

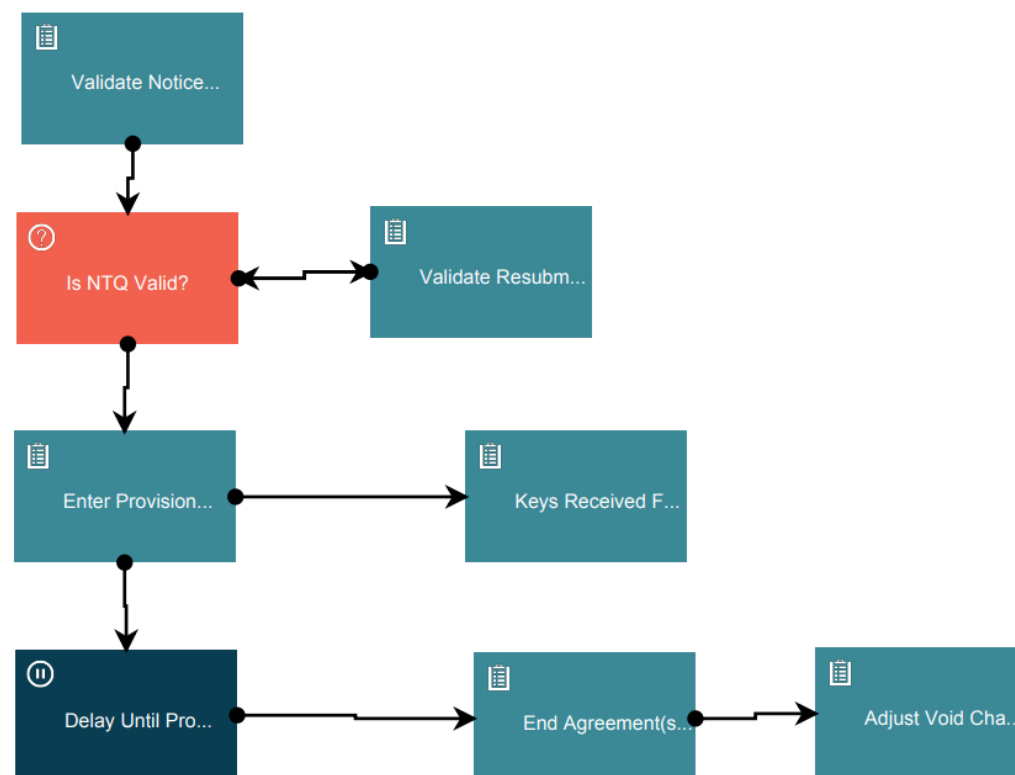
Next

“Staff love it – they just type the name of the staff member and that’s it they know they have a call back.” - Leigh

“Using generic cases means far less clicks and has streamlined many processes” - Sharon

# Bristol City Council

## End Tenancy (Notice to Quit) – The Path



# Bristol City Council

## End Tenancy (Notice to Quit) – The Path

- Task script on 1<sup>st</sup> task with logic to advise user of the outcome

**Task Script** [Help](#) [Close](#)

**NOTICE TO QUIT VALIDATION CHECKLIST**

When a notice is submitted by a tenant, it must be checked and validated against our Housing Management System to ensure it is legally compliant to accept. Using this 'NTQ Validation Checklist' we determine whether the notice is valid and accepted or returned to the tenant due to the NTQ containing errors.

1. Does the name and address of the tenant submitting the notice match our Housing management system records? (Should be: RentAgreement.ResponsibleContactName at [redacted] House, Phipps Street, Southville, Bristol [redacted])

2. Is the notice signed by the tenant(s) - if it is a joint tenancy do you have both signatures?

For a NTQ to be valid, the start date of the notice must be after the date we received it- the exception being where the notice is received by 12 noon on the Monday. A NTQ cannot be backdated. All tenancies start and end at 12 noon on a Monday.

3. Is the start date of the notice after the date we received it?

4. Is the notice provided within our NTQ Template? Complete the UDF confirming the authority to dispose has been signed & received.

5. The Housing Officer will have to carry out a visit in the next fortnight to discuss with the tenant the practicalities of moving out. Are there any dates / days / times not suitable?

6. Has the tenant brought the keys to the property along with the NTQ?

# Bristol City Council

## End Tenancy (Notice to Quit) – The Path

► Information tab to record the outcome which links to a path decision

Summary

Information

Related Tasks \*

Attachments 0

User Defined

Is Notice To Quit Valid?

Reason for leaving?

Is the tenant leaving BCC?

Configure Decision

Help | Close

Name

Is NTQ Valid?

▼ Conditions

Menu

Description	Effective from	Criteria	E
NTQ Valid	Tue, Dec 19 2017	Validate Notice To Quit.VNTQValid = (1) Yes	
Else	Tue, Dec 19 2017		

1 - 2 of 2

1

New Condition

Confirm

# Bristol City Council

## End Tenancy (Notice to Quit) – The Path

- ▶ Conditional delay – auto completing when the Agreement proposed end date is reached

**Configure Delay** Help | Close

Name: Delay Until Provisional Void I

Delay type: Conditional

Condition: System.Date >= RentAgreement.ProposedEndDate

Maximum delay:   
unit:   
Maximum delay:   
period:

Mandatory: ☐

Define Condition Confirm

# Bristol City Council

## End Tenancy (Notice to Quit) - Further areas to build on

- ▶ Additional information field on 1<sup>st</sup> task about keys received Y/N followed by task to manage keys ;
- ▶ Task / notification to Housing Officer if the reason for notice is for instance 'going to care home' or domestic abuse / harassment
- ▶ Add in the communications as blocks

# Bristol City Council

## End Tenancy (Notice to Quit) – The Benefits

- ▶ BCC has a webform for tenants to give notice – the output of the webform is automatically picked up and turned into a CRM Communication (1 point for checking out inbound comms rather than multiple mailboxes)
- ▶ We had issues with invalid NTQ – the task script is guiding the user in deciding if valid or not = will reduce errors / rework



# Bristol City Council

## End Tenancy (Notice to Quit) – The Benefits

- ▶ Conditional delay will release the keys task + end agreement once the provisional end date is met = we will minimise instances of agreements running after end date and help users have visibility of void keys
- ▶ All of this functionality will enable staff to be more flexible and manage the majority of the cases without support due to the ability to provide guidance, prompts and scripts



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