

Policy	Onboarding Policy
Policy Ref:	PHL POL43
Approved by:	
Date Approved	
Updated	First Issue
Lead Officer/post	Extra Care Operations Manager

1. Introduction

Preferred Homes Limited ('PHL') is committed to delivering a first-class service to all customers moving into their new homes. This policy will work in conjunction with the development process to support a seamless transition and preparation for customers moving into their home.

PHL will work with its Management Providers and other Stakeholders to ensure principles within this policy are adopted across each extra care scheme. PHL works in conjunction with the eligibility criteria to ensure that all applications into extra care housing meet the criteria.

2. Aims

The onboarding policy aims to deliver:

- Reassures the customer through providing comprehensive information about the property, their tenancy and who to contact for any future enquiries.
- Minimal void loss time by preparing the customer for when the property is ready.
- Support effective communication with all prospective customers, partners, stakeholders.
- A dedicated tailored approach to support individual's needs.
- Support with an effective mobilisation plan to ensure minimal void loss.
- To support all health and safety and legislation requirements
- To ensure safe mobilisations for all customers, contractors, staff, partners and visitors.
- Eliminate or reduce any hazards for customers, visitors and contractors during the mobilisation phase.
- A partnership approach to ensure effective allocation of properties to support individuals needs that meet the eligibility criteria.
- To complement the allocations procedure in relation to eligibility assessment

3. Eligibility Criteria for Extra Care Housing

Extra Care Housing is a model of housing that supports individuals to live independently with the additional benefit of security, care and support and social inclusion to support with overall well-being.

To ensure that the model of housing meets the needs of individuals an eligibility criteria is in place which includes:

- Age – for individuals over the age of 55
- Local Connection to the area
- Support or Care Need
- Housing need that is affecting their overall health and wellbeing

4. Applications and Expression of Interest

Applications can be made direct via an initial contact assessment form (Appendix 1) To support with the next stage of the process; an application form is sent to the applicant.

The application form captures further information including:

- Current property details (Tenure)
- National Insurance Number
- Date of Birth
- Reasons for the request to move
- Health and care needs
- Benefit details
- Status of entry into the UK
- Pets
- Household occupants

The application form supports the team to identify if the individual meets the eligibility criteria for extra care housing.

Referrals and applications via the local authority will also form part of the process and they will support the requirement for any care assessments that are required, the applicant will also be required to complete an application form.

5. Waiting List

The housing management team will support the management of a waiting list which is regularly updated and shared securely with the allocation panel team. A template waiting list is included in this document (Appendix 2)

6. Risk Management

It is essential to identify any risks prior to allocation of property for example fire safety, safeguarding, financial affordability. Throughout the application process including panel

meetings individuals risks that have been identified are discussed to support with effective allocation.

7. Panel Meetings

Partnership working and effective communication is essential to support with effective on boarding. Representatives from PHL, Housing Management Organisation, Care Provider, Social Worker Team Manager and the Local Authority will be in attendance. Panel Meetings will commence approximately 12 weeks prior to completion.

8. Allocation Outcome

Following the panel meeting arrangements are made to view the property with the applicant. During the viewing applicants have an opportunity to ask questions and gain a greater understanding about extra care housing. It is also an opportunity for the member of staff conducting the viewing to gain more information about the applicant.

Following the viewing an Allocation Decision Record (ADR) is completed and submitted to the panel (Appendix 3). This is used in conjunction with the allocation scoring matrix (Appendix 4). A joint decision is required to support approved and unsuccessful applications; applicants are then contacted in writing about the decision. There is also an opportunity for individuals to appeal decisions that have not been accepted.

9. Prior to Sign up

Prior to sign up of a property the following areas will also need to be established by the housing management team:

- Proof of Identification
- Proof of Benefits
- If self-funding evidence of affordability (means to pay)
- If there is a house to sell and how the rent of the apartment is funded during the house sale
- Any risks that have been identified at the allocation panel and how they are managed.
- If a financial assessment is required
- If a care assessment is required
- If any adaptations are required
- Are there any pets
- Individual needs in relation to evacuation in the event of a fire
- Who is supporting with the house move
- If the applicant has a car
- If the applicant has a mobility scooter
- If the applicant is on oxygen

10. Mobilisation Key Stages

Site Visits

PHL will begin site mobilisation visits prior to the expected completion date to support with effective mobilisation for all parties involved in customer onboarding. PHL expects all parties to engage fully in site mobilisation to support effective onboarding for customers. All visitors must comply with the health and safety regulations and site requirements, no unauthorised site visits will be permitted. All visitors to site must be equipped with appropriate PPE.

Time Frame	Action	Outcome	Key stakeholders
Six months prior to completion	PHL Development Team to showcase the development and site progress.	To gain a good understanding about the development and raise any queries.	PHL Team Local Authority Key stakeholders
Prior to completion (x 2 visits)	Site Meetings arranged prior to completion.	To gain a good understanding about onboarding and practical operational matters	Housing Management Care Management Local Authority PHL Operations PHL Development
Monthly Weekly Meetings	Meetings to provide an update on progress/delays	To support with effective allocations	PHL Housing Management Provider Care Management
After completion of Show Apartment	To arrange safe site visits for prospective customers.	To support prospective customers to visit a show apartment.	Contractor Housing Management Provider PHL Operations
Property Handover (1 st week)	Final handover HUG Pack for all properties	To support next steps of onboarding	PHL Housing Management Care Management
Equipment Training	Train Staff on equipment Fire Safety	To meet H&S Standards to operate equipment safely.	Housing Management Care Team PHL Operations

Show Apartment

For developments where there is a show apartment, arrangements will be made by the Housing Management Team to support with viewings of a show apartment prior to allocation. This will support with individuals wishing to proceed. During the viewing further information will be captured and a viewing record will be completed (Appendix 3)

Pre-Move In

Key Information

It is essential to support effective communication prior to a customer's move in date. This will include sharing key information including rent, service charges, type of tenancy agreement, specific information about the apartment for example room sizes, window sizes. There may be times when prospective customers require advice on benefits, removal companies, utilities and staff on site will support with signposting.

Time Frame	Action	Outcome	Responsibility
Post Allocation	To update customers who have been allocated an apartment timeframe for completion.	Customers are fully informed throughout the onboarding journey.	Housing management provider
Floor Plan of apartment	To issue a copy of the floor plan.	To support with customers to plan for furniture	Housing management provider

Viewings

It is beneficial for customers to view the property before they accept or reserve a home. If there is a show apartment available arrangement will be made to support a viewing. All prospective customers will be advised that not all apartments are the same as the show apartment and their new home may vary in layout and size.

It may not be possible to view a property until the ready to let stage, therefore a customer may only view the property at the point of sign up. We will support to facilitate viewing to minimise potential letting delays or rejections. All viewings will be completed during the later stages of build or void works and all health and safety procedures must be adopted.

Prior to sign up/property handover

Prior to handing over the keys at sign up, the following will be in place:

Time Frame	Action	Outcome	Responsible
Prior to Allocation	Arrange viewing with applicant Application Form	Property is suitable	Housing Management Team

Prior to allocation	Panel Meetings Risks Safeguarding ADR completion	Successful allocation	Allocation Panel
Prior to Sign up of tenancy	Right To Rent References Evidence of benefits Proof of Identification	To ensure applicant can afford to live at the scheme	Housing Management Team
Prior to Handover	Snagging/defect	Property is ready to let	Property maintenance
Prior to construction Handover	Home User Guide (HUG Pack)	All equipment instructions are available in the property	Housing Management Provider
Post Construction Handover	Toilets Flushed Shower Tested Lights tested. Pull cord emergency alarm tested. Keys tested. Meter reading	Property is ready to let	Housing Management onsite team
Week prior to sign up	Sign up date arranged. Sign up pack ready. PEEP/PCFRA	Property is ready to let	Housing Management team

Handover of property

The day when keys are handed over can be a stressful time for customers and it is essential that all steps prior to sign up have been completed.

Staff on site will support with home demonstrations for new customers moving in, this will be conducted room by room for example how to use the heating.

Key documentation will be given to customers by onsite housing management staff on the day of handover which include:

- Tenancy Agreement
- Property Health and Safety
- Equipment instructions and warranties
- Meter readings
- Confirmation of keys

- Welcome letter/booklet.
- Home User Guide (HUG)

11. Keys and Key Safe

All customers will be issued with 2 sets of keys for their front door and 2 sets of keys for their patio where appropriate and a set of window keys. They will also be issued with a fob for the main entrance doorway. Once keys are handed over to the customer, they are responsible for the safe keeping of their keys. In the event of keys being lost, it is the responsibility of the customer to update the housing management team and a charge will be incurred for replacement keys.

The housing management team will arrange the installation of key safes to support with any potential access requirements.

12. Post Move in

To support with an effective on-boarding journey, it is essential to complete a visit to customers to ensure they are settled into their new home. It is recommended that all customers have a six week check in post move that is completed by the onsite housing management team. A member of the PHL Operations team will also meet with new customers to support with customer satisfaction.

13. Quality Assurance

PHL will support effective quality assurance measures throughout the onboarding process which include the following:

- New Letting surveys (six weeks post tenancy sign up)
- Effective Complaint Handling.

14. Appendices

Appendix 1	Initial Contact Assessment Form
Appendix 2	Waiting List Template
Appendix 3	Allocation Decision Record
Appendix 4.	Extra Care Housing Risk Scoring Matrix

15. Associated Policies

Allocations Policy
Nominations Agreement
Defects Management Policy
Handover Process
Service Level Agreement Housing Management

Health and Safety
Safeguarding Policy
Equality Diversity and Inclusion Policy
Hoarding Policy