Affordable Homes Programme 2011-15

Offer Summary Screens in IMS

Version 1.0

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Introduction

A. Purpose of this document

The purpose of this document is to provide an overview and general guidance on accessing and using the Offer Summary Screens within the Offers Section of IMS within the 2011-15 Affordable Homes Programme (AHP).

Please note: This document looks to provide a general guide on using the Offer Summary Screens to review changes that have occurred during the AHP programme. Users can use this document to assist in using the system but the tool is user friendly and providers will find ways of utilising it to best suit them.

B. IMS Themes

Please note: This guidance has been produced using screen shots of IMS viewed via the Luna Blue theme. To select this theme, select Tools menu > Themes > Luna Blue Theme > Save

C. User Support

For help accessing the IMS system or to report a problem, please contact the helpdesk on 01908 353604
For bid queries, please contact the appropriate HCA Regional Office:
http://www.homesandcommunities.co.uk/inyourarea

D. Related Documents

- 2011-15 Affordable Homes Programme – Framework
- Affordable Housing Capital Funding Guide
- IMS Help Page – contains IMS Users Guides
1  Accessing the Offer Summary Screens

The design of the Offer Summary screens is intended to make the understanding, and the assessment of changes and Programme Change Notifications made by Providers, easier to comprehend. This area of the system is available for both Provider and Funder users.

The key areas covered by the Offer Summary screens enable users to;

- Review the current approved version of an offer against the originally accepted version.
- Identify proposed changes made to the programme (Programme Change Notifications (PCNs)) so that the overall impact is understood and can be managed. The proposed version of the programme will include any changes that have been submitted by the provider that have not yet been approved.
- Allow Operating Area staff to more easily review the additional information provided on individual changes made at the offer line sub product level.

There are a number of areas of IMS where the Offers Summary screens can be opened.

- Offer
- Offer Line level
- Offer Line Sub Product Profile
- From the Scheme List
1.1 Accessing through Offer View

When in an Offer, the Offer Summary Screen is opened by selecting the icon on the right hand side; this is shown by an arrow in the screenshot below.
1.2 Accessing through Offer Line View

When in Offer Line view go to the Products tab and then choose Affordable Rent or Affordable Home Ownership as appropriate.

The Summary Report icon is then at the bottom left hand corner of the screen as shown overleaf.
1.3 Access at Offer Line Sub Product Profile Level

At the Offer Line Sub Product Profile level the Summary Report icon is on the right hand side of the screen; as shown below.
1.4 Access at Scheme View

Right clicking on a scheme in the scheme list view and selecting ‘Offer Line Summary Report’ (The screenshot below highlights the new option added to the list when you right click on a scheme)

2 Flexible or PCN View

2.1 The Filter Screen

When entering the ‘Offers Summary’ from the Offer Level users are presented with the following filter screen;
The default is to open in the flexible view and the filter screen provides six levels of information for the chosen provider, some of which have multiple options.

If the PCN view is chosen the filter screen revises to look as below. This time Level 2 is the only level with multiple options, users can also amend the HCA Operating Area.
2.2 The Flexible View

When selecting the Offer Summary screen through Offers, and using the flexible view, the screen opens in default to show the Proposed vs. Approved version.

Using the dropdown gives two other options in this view, Approved to Original Approved and Proposed to Original Approved. Each view provides a live snapshot comparing the level being viewed at each of these different stages.

For example, in the screenshot below, the Proposed to Original Approved option is displayed at the Offer level for a Provider’s complete 2011-15 programme. The changes in Units, Payment and Average Rents are shown in the Difference row highlighted in red.
2.3 The CSV Function

At any level, users are able to generate a CSV file of the results which can then be utilised in an Excel file. HCA users can save this CSV file to a local drive, while, for Provider users, the CSV file will be sent to the e-mail address registered to their user account. The user should contact their system administrator if they are in any doubt as to which e-mail address is registered to their user account before using this function.

2.4 Order by Version vs. Order by Offer Line

Each of the screenshots above of the flexible view are shown with the Order by Version box checked at the top as default. Users can check the alternate button to Order by Sub Product. A screenshot of this view is shown below;
The Parent/Child Detail bar which is on the left hand side can be minimised by using the toggle arrow. Pressing the arrow button when minimised will bring the detail bar back.

Each of the views in the above screenshots have been showing the summary tab within the Offers Summary. There are four other tabs namely; Mix, Starts, Completion and Expenditure. Each of these will break down the information provided in the Summary tab into finer detail depending on the view chosen.

2.5 The PCN View

When entering the Offer Summary screen choosing the PCN view will present a more limited number of levels to filter for the provider.

Utilising this view allows Funder users to more quickly understand the implications of Programme Change Notifications generated by IMS arising from material changes made by providers. Providers are able to use this view to see the net effect of changes made within their programme that may be discussed with their HCA lead.

When using the PCN view the user will be presented with the details of the offer lines / profiles / schemes under review, plus they will be able to view the details where PCNs are affecting other offer lines / profiles / schemes within the same offer.
Currently, if an offer line / profile / scheme is not subject to a PCN it will not be displayed at all. If a user wishes to see the whole programme they should use the flexible view accessed through the offer screen.

Any amendments to the funding requested or changes to the payment rate are not included in this phase of the release. This functionality will be built into a future release.