Affordable Homes Programme 2015-18

Provider Reports in IMS

IMS System Guidance v 1.1

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<tr>
<th>Version</th>
<th>Date Issued</th>
<th>Details</th>
</tr>
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<tbody>
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<td>1.1</td>
<td>24/08/2015</td>
<td>Security Permissions added</td>
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A set of Provider Reports have been created in IMS to help improve external reporting. These reports will allow real-time access to data on the progress of profiles, allocations, schemes and forecasting in Excel spreadsheet format. These reports will be visible on screen and can be emailed to the address of the user.

Provider Reports are accessed from the main menu of IMS as seen above on the far right-hand side of the available options.

Access to Provider Reports is given via permissions assigned by an organisation’s security administrator. If a user is receiving the above security error message when trying to open Provider Reports they should contact their security administrator to request access. The two different permissions are displayed above dependent on the type of provider (Unregistered Body or Registered Provider).
Provider Reports initially opens to the **Forecast Milestones Report**. Alternative options in the left hand column are **Current Programme Report** and **NAHP Schemes Report**.
For the Forecast Milestones Report the options available for the sub type are shown above. This report is intended to identify start on site, interim and completion forecasts.

When selecting the Approaching Milestones option another dropdown field is displayed where Providers are able to select the appropriate criteria. The options are;

- Current month and next month
- Current month and next two months
- Current month and next three months

For all of the Provider Reports, an HCA Operating Area can be selected, alternatively, leaving this field blank will mean that the National position for a Provider is displayed.
Once a report sub type, Operating Area and approaching criteria (for the Approaching Milestones report) are selected users can click on **Generate Report** at the bottom of the screenshot above and the report will initially be displayed on screen.
As the report is being generated the whirring display above will be shown as the report is generated in the background.
A completed report is shown above. If a user wants to have a saved copy of the report there are two options available. Export as an Excel document, or, Export as a CSV file. Both options will mean that a saved copy will be sent to the email address stored in IMS for the user.
Once a report has been sent via an email, a message similar to that above will be displayed. If the email address is incorrect or the email is not received please check with your organisation’s security administrator to check the saved email address is correct.
The **Current Programme Reports** work in a very similar way to those described for Forecast Milestones in the previous pages. The Analysis type options are Expenditure, Unit Starts and Unit Completions. Selecting one of these along with an HCA Operating Area will identify all actuals and remaining forecasts for the current financial year month by month. It will also show forecasts for the following two years as annual totals.
The final available report is the **National Affordable Housing Programme (NAHP) Outstanding Schemes Report**. This report does not have any parameters to amend; pressing the Generate Report button will identify any outstanding scheme forecasts for a Provider’s NAHP schemes.