



# Evidence manager

CHRIS guide for community housing providers

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The information in this document is subject to change without notice.

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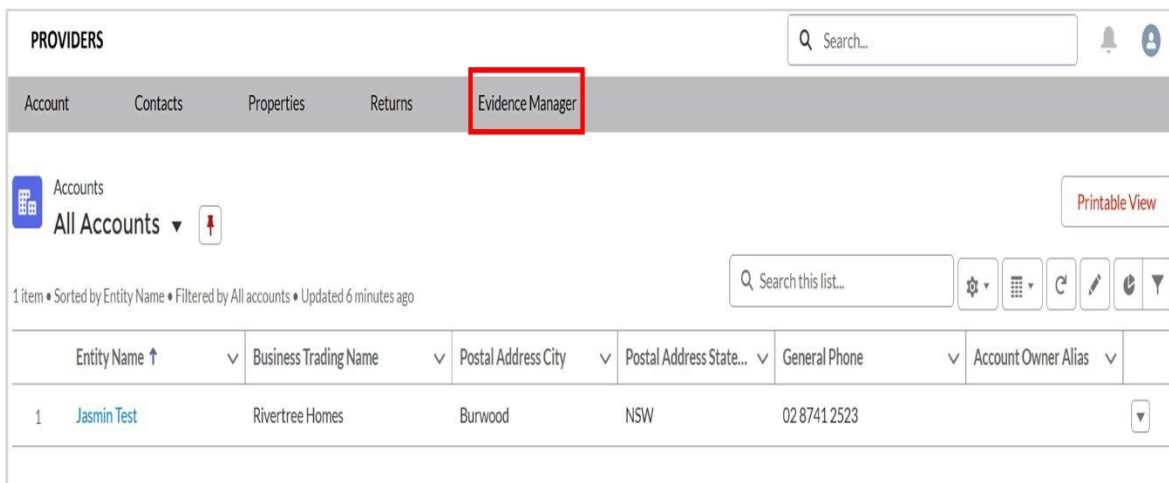
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# 1. Introduction

Evidence documents (referred to as files in Salesforce Lightning Experience) are unified into a single system for easier management, retrieval and collaboration. Files in the *Evidence Manager* object can be assigned to one or more returns improving document handling, organisation and accessibility.

## 2. Evidence manager overview

The *Evidence Manager* object contains a centralised repository of all evidence submitted by the provider. It is designed to streamline the management of documents and evidence submissions for Registration and Compliance Returns. To view and update the document library click on the object marked *Evidence Manager*.



PROVIDERS													
Account	Contacts	Properties	Returns	Evidence Manager									
<div>Accounts</div> <div>All Accounts ▾</div> <div>1 item • Sorted by Entity Name • Filtered by All accounts • Updated 6 minutes ago</div> <div>Search this list...</div> <div> <div>Entity Name ↑ ▾</div> <div>Business Trading Name ▾</div> <div>Postal Address City ▾</div> <div>Postal Address State... ▾</div> <div>General Phone ▾</div> <div>Account Owner Alias ▾</div> </div> <table border="1"> <tr> <td>1</td> <td>Jasmin Test</td> <td>Rivertree Homes</td> <td>Burwood</td> <td>NSW</td> <td>02 8741 2523</td> <td></td> </tr> </table>							1	Jasmin Test	Rivertree Homes	Burwood	NSW	02 8741 2523	
1	Jasmin Test	Rivertree Homes	Burwood	NSW	02 8741 2523								

The *Evidence Manager* object will contain a list of all evidence that the provider has uploaded, since the implementation of Salesforce Lightning, related to Registration and Compliance Returns.

Evidence attachments uploaded prior to the introduction of Salesforce Lightning will be visible in the *Evidence Document* tab under *Evidence Attachments* in the *Return* object. These documents have not been migrated to *Evidence Manager*. *Evidence Manager* provides a 'clean slate' for providers allowing you to effectively manage your documents.

PROVIDERS						
<div> <div>Account</div> <div>Contacts</div> <div>Properties</div> <div>Returns</div> <div><b>Evidence Manager</b></div> </div> <div> <div>Q Search...</div> <div> </div> </div>						
<div>Account &gt; Jasmin Test</div> <div> <div>Upload</div> <div>Export</div> </div>						
<div>Latest Evidence (7)</div> <div> <div>Q</div> <div>🔄</div> </div>						
Evidence Number	Filename	File Category	Performance Outcome	Review Date	Uploaded Date	
1	EV-202501-12	Annual Report.docx	Annual Report	PO2. Housing Assets	28/01/2026	31/01/2025
2	EV-202501-13	Business plan.docx	Business Plan	PO1. Tenant and Housing S...	23/06/2025	31/01/2025
3	EV-202501-14	evidence-guidelines.pdf	Engagement activities - co...	PO3. Community Engagem...	08/10/2025	31/01/2025
4	EV-202501-15	metrics-and-indicators.pdf	Delegations	PO4. Governance	27/01/2026	31/01/2025
5	EV-202501-16	Organisational Chart.docx	Structure - Corporate and c...	PO6. Management		31/01/2025
6	EV-202501-17	Policy document.docx	Policies and procedures	PO1. Tenant and Housing S...		31/01/2025
7	EV-202501-18	procedure.docx	Policies and procedures	PO1. Tenant and Housing S...	22/07/2026	31/01/2025
<div>All Evidence (7)</div> <div> <div>Q</div> <div>🔄</div> </div>						
Evidence Number	Filename	File Category	Performance Outcome	Review Date	Uploaded Date	
1	EV-202501-12	Annual Report.docx	Annual Report	PO2. Housing Assets	28/01/2026	31/01/2025

Evidence is sorted into two sections:

- **Latest Evidence** – This represents evidence documents that have been uploaded within the last 12 months for Tier 1 and Tier 2 providers. For Tier 3 providers, this will be evidence documents uploaded in the last 24 months, aligning with the standard compliance schedule.
- **All Evidence** – All files that have been uploaded to CHRIS by the provider

From *Evidence Manager* you can:

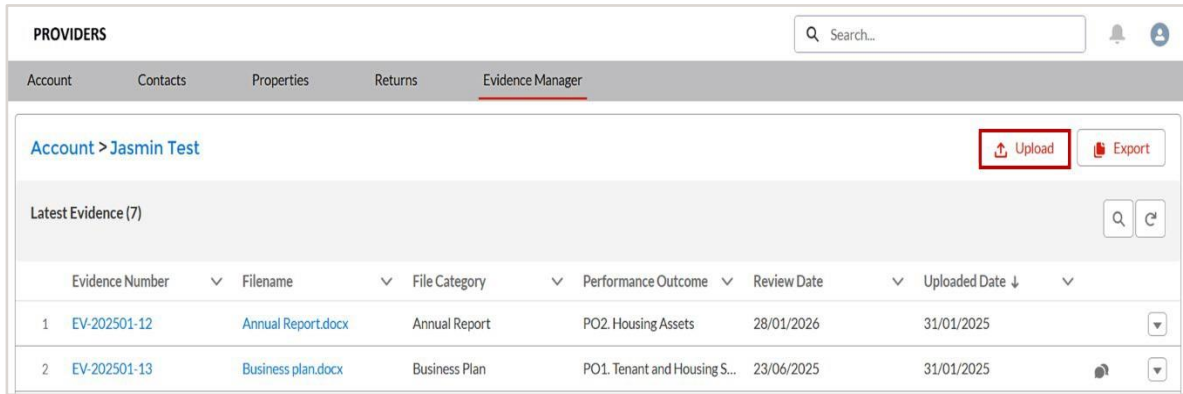
- Bulk upload new evidence
- Upload a new version of an evidence document
- Edit information related to a file
- Search and filter by *File Name* and *File Category* to locate evidence documents
- Download an evidence document
- Export list of evidence documents

## 3. Upload evidence documents

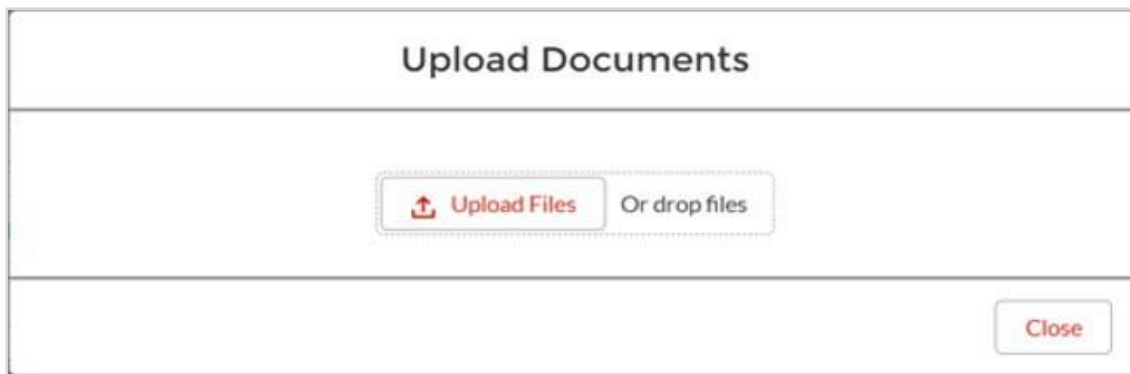
**Note:** If you are uploading a new version of an evidence document already saved, please refer to Section 4 of this document – Upload a new version of a document.

1. To upload single or multiple evidence documents, click on the **upload** button located on the top right-hand side of the **Evidence object page**.

**Note:** You can upload up to 10 documents at once.



The “Upload documents” pop up window appears



2. You have two options for uploading your evidence documents:

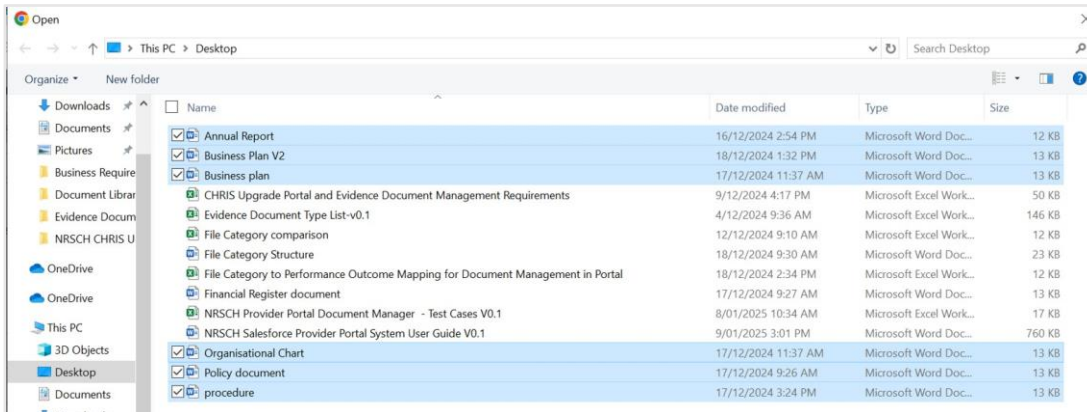
**Option 1: Drag and Drop Files** – Drag and drop the documents you want to upload:

- Open file explorer on your computer
- Select the files you want to drag and drop to the “or drop files” box. Release the mouse button to drop the files into the drop files area. You must drop the files within the dotted line box for this to work successfully.

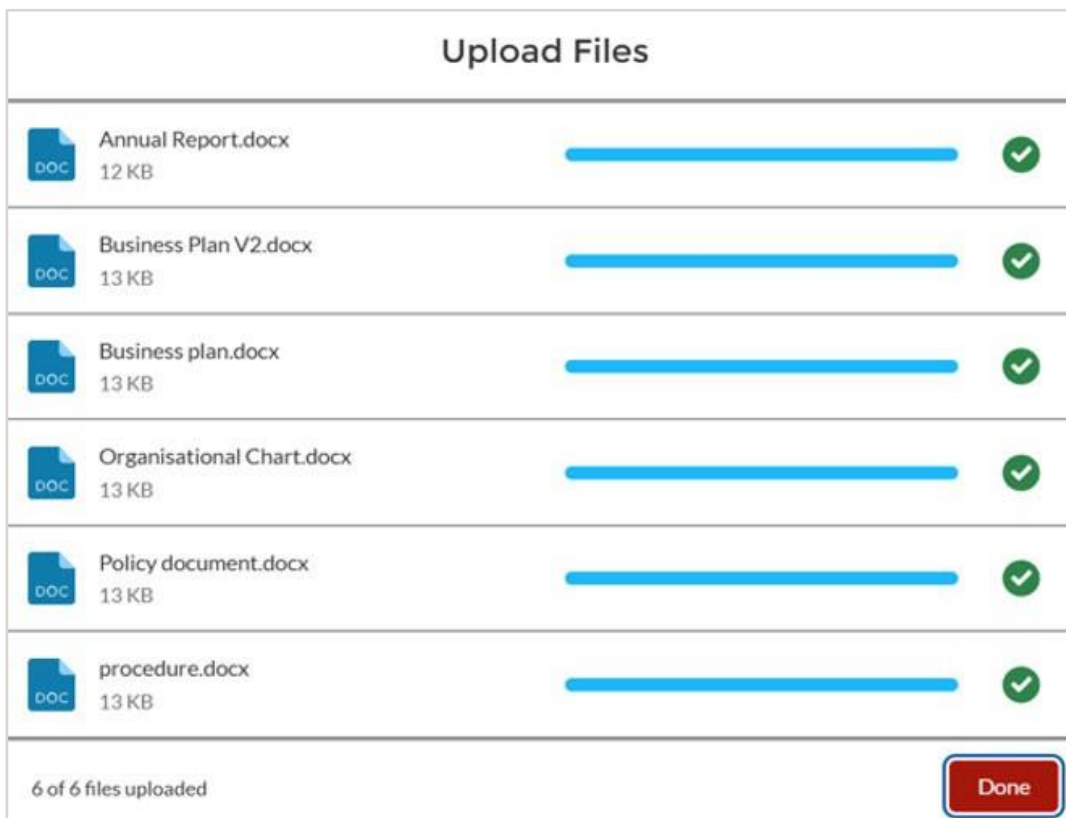
**Option 2: Upload Files**

- Click on the Upload Files button
- File explorer opens on your computer
- Select the files you want to upload (Maximum you can select is 10) and click on the Open button.

## CHRIS guide for community housing providers



3. The Upload Files window appears displaying a progress bar as the files are uploading.



4. Click on the Done button once all documents are uploaded. Files are upload when the blue bar is complete, and a green tick is shown against each file.

5. Documents have now been successfully uploaded to the Evidence list as displayed in the following image.

**PROVIDERS** Q Search... 🔔 👤

[Account](#) [Contacts](#) [Properties](#) [Returns](#) [Evidence Manager](#)

[Account > Jasmin Test](#) 📁 Upload 📄 Export

**Latest Evidence (7)** 🔍 🔄

	Evidence Number	Filename	File Category	Performance Outcome	Review Date	Uploaded Date ↓	
1	<a href="#">EV-202501-12</a>	<a href="#">Annual Report.docx</a>				31/01/2025	▼
2	<a href="#">EV-202501-13</a>	<a href="#">Business plan.docx</a>				31/01/2025	▼
3	<a href="#">EV-202501-14</a>	<a href="#">evidence-guidelines.pdf</a>				31/01/2025	▼
4	<a href="#">EV-202501-15</a>	<a href="#">metrics-and-indicators.pdf</a>				31/01/2025	▼
5	<a href="#">EV-202501-16</a>	<a href="#">Organisational Chart.docx</a>				31/01/2025	▼
6	<a href="#">EV-202501-17</a>	<a href="#">Policy document.docx</a>				31/01/2025	▼
7	<a href="#">EV-202501-18</a>	<a href="#">procedure.docx</a>				31/01/2025	▼

**All Evidence (7)** 🔍 🔄

	Evidence Number	Filename	File Category	Performance Outcome	Review Date	Uploaded Date ↓	
1	<a href="#">EV-202501-12</a>	<a href="#">Annual Report.docx</a>				31/01/2025	▼



The *Evidence manager* object enables providers to upload a new version of a document already saved. This allows all versions of a document, such as policies and procedures, to be maintained in one location improving access and the organisation of files.

- | Account > Jasmin Test |              |                            |                              |                     |               |            | <div> <div>Upload</div> <div>Export</div> </div> |  |
|-----------------------|--------------|----------------------------|------------------------------|---------------------|---------------|------------|--|--|
| Latest Evidence (7)   |              |                            |                              |                     |               |            | <div> <div></div> <div></div> </div>             |  |
| Evidence Number       | Filename     | File Category              | Performance Outcome          | Review Date         | Uploaded Date |            |  |  |
| 1                     | EV-202501-20 | metrics-and-indicators.pdf | Agreements and contracts ... | PO2. Housing Assets | 31/03/2026    | 31/01/2025 | <div> <div></div> <div></div> </div>             |  |

- PROVIDERS

Search...

Account | Contacts | Properties | Returns | Evidence Manager

File metrics-and-indicators.pdf

[Download](#)
[Upload New Version](#)
[Edit File Details](#)

Size 252KB	File Extension pdf	Owner <a href="#">Koala Bear</a>
---------------	-----------------------	-------------------------------------

**PREVIEW**

DETAILS

The NRSCH has established metrics and indicators for operational and financial measures. These do not determine compliance by themselves. Rather, they provide a starting point to assess performance.

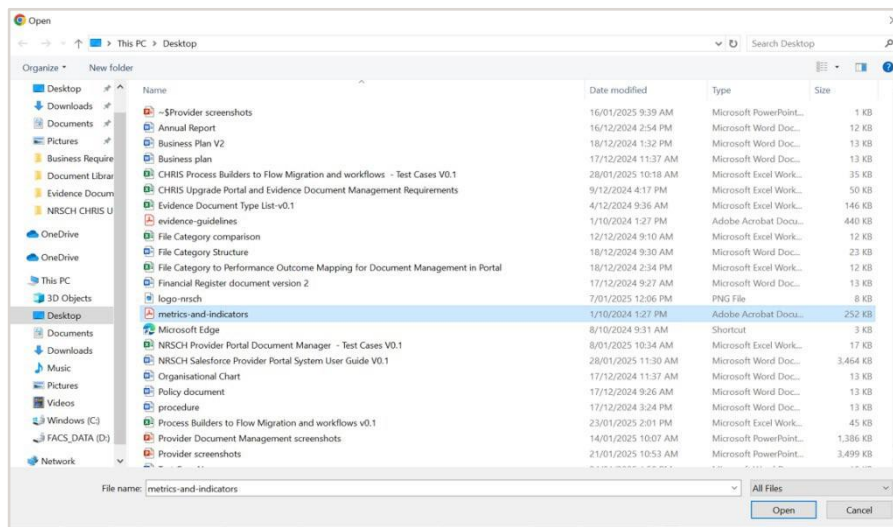
A red or orange traffic light does not mean the provider has 'failed' a performance requirement or outcome - instead, it indicates that the data does not meet the target range. The provider has the option to provide an explanation for each of the metrics outcomes. The Registrar seeks to understand contextual and other factors that contribute to the result.

### Metrics Information Sheet

Shared with (3)

  - Koala Bear Owner
  - Jasmin Test Set by Record
  - EV-202501-20 Set by Record[View All](#)

## File explorer opens on your device



3. Select the file you want to upload to replace the existing document and **click on the Open button**. The Upload New version window appears, **populate the “what changed?” field and click on the upload button**

The screenshot shows a window titled 'Upload New Version'. It displays a PDF icon and the filename 'metrics-and-indicators.pdf'. Below this is a text input field labeled 'What Changed? (optional)'. At the bottom right, there are 'Cancel' and 'Upload' buttons.

4. A new version of the document has now been uploaded.

5. To verify go to the File Details page and check the version history in the right-hand column. The new version and any previous versions will display here. You can view the current and previous versions by selecting the version hyperlink.

PREVIEW
DETAILS

**Metrics Information Sheet**

The NRSCH has established metrics and indicators for operational and financial measures. These do not determine compliance by themselves. Rather, they provide a starting point to assess performance.

A red or amber traffic light does not mean the provider has 'failed' a performance requirement or outcome - instead, it indicates that the data does not meet the target range. The provider has the option to provide an explanation for each of the metrics outcomes. The Registrar seeks to understand contextual and other factors that contribute to the result.

CHRIS REF	CHRIS Metrics	Indicator / Target range	Source Fields	Actual field references
<b>PO 1 - Tenancy management metrics</b>				
1.2a	Eviction rate	<=10% Green >10 - 12% Amber >12% Red	Tenants evicted as a percentage of the total number of exits for the year	"1.2.4 Evictions for the year"/"1.2.3 Tenancy exits for the year"
1.3a	Percentage of tenants responding to the survey out of total tenants	>=10% Green <10% Amber	Survey responses received as a percentage of the number of tenancies	"1.4.3 Number of surveys returned"/"1.2.1 Tenancies for the year"
1.3b	Survey return rate from number of surveys distributed	>=25% Green 5-24% Amber <5% Red	Survey responses submitted as a percentage of the number of surveys distributed	"1.4.3 Number of surveys returned"/"1.4.2 Number of surveys distributed"

Shared with (3+)

Test Portal  
Owner

Gerry Company  
Set by Record

EV-202501-78  
Set by Record

View All

Versions (2)

Version 2  
Test Portal | 28/1/2025, 11:50 am  
new version

Version 1  
Test Portal | 14/1/2025, 9:44 am

6. When a new version is updated the File details are unchanged. Providers should check the review date to ensure that it remains correct and relevant.



If the status of the Return is **"Return Submitted"** and you are attempting to upload a new version of an evidence document an error message will appear as displayed below, please refer to **Business Rule 4** located in **Section 11 – Evidence Manager Business Rules**.

Can't upload file

Your return has a status of Return Submitted you cannot upload a new version of this file. Please contact your analyst.

Got It

## 5. Edit document information

Now that you have successfully uploaded your files to the Evidence Manager you can edit and update the following information against each file:

**Filename** – Mandatory. Edit the name assigned to the file when it was created. Ensure you follow a logical structure with your naming conventions, use descriptive names, keep it short but meaningful, use underscore or dashes instead of spaces, include a consistent date format and version numbers. A few examples for good practice are:

- BudgetReport\_FY2025\_V2.xlsx
- Housing Policy -31-1-2025\_v1.pdf
- Eviction Notice\_Tenant\_NSW\_10-02-2024\_v1.docx

**File Category** – Mandatory. Each document file is assigned a file category. It's a classification used to organise and manage documents and is intended to help providers to quickly locate, sort and filter documents within the portal. Please refer to the *Guidance – Assigning File Categories*.

**Performance Outcome** – Mandatory. The National Regulatory Code set performance outcomes that must be met by registered community housing providers under the Community Housing Regulatory Framework.

**Review Date** – Optional. The review date can be used by providers to trigger a notification that the document is due to be updated or reviewed. This notification will trigger approximately two weeks prior to the review date. Only the nominated main contact can set the review date for a document. Setting a review date helps ensure that evidence documents remain current and reduces the burden at the time of compliance.

**Additional Comments** – Add any additional comments required against the document file. If a comment has been added, you will see this symbol against a document record.



Additional comments are required when there are significant changes to a document since the last submission. If there has been no significant change to the supporting documentation since submitting your last return, you can also include this in the comments.

**Note:** Providers are encouraged to update the document information at the time of upload. It is important that the details related to all uploaded documents are maintained and that they are assigned to the appropriate performance outcomes. The file category will also assist in the organisation and management of evidence documents.

1. To edit document information, click on the down arrow button located on the far-right hand side of the document row and select the *edit* button

PROVIDERS

Search...

Account   Contacts   Properties   Returns   Evidence Manager

Account > Jasmin Test

Upload   Export

Latest Evidence (7)

	Evidence Number	Filename	File Category	Performance Outcome	Review Date	Uploaded Date	
1	EV-202501-12	Annual Report.docx	Annual Report	PO2. Housing Assets		31/01/2025	▼
2	EV-202501-13	Business plan.docx	Business Plan	PO1. Tenant and Housing S...	23/06/2025	31/01/2025	Edit Delete More Details
3	EV-202501-14	evidence-guidelines.pdf	Engagement activities - co...	PO3. Community Engagem...	08/10/2025	31/01/2025	▼
4	EV-202501-16	Organisational Chart.docx	Structure - Corporate and c...	PO6. Management		31/01/2025	▼
5	EV-202501-17	Policy document.docx	Policies and procedures	PO1. Tenant and Housing S...		31/01/2025	▼
6	EV-202501-18	procedure.docx	Policies and procedures	PO1. Tenant and Housing S...	22/07/2026	31/01/2025	▼

2. The Edit Document window appears as shown below

**Edit Document**

Filename

\* File Category

Performance Outcome

Available

Chosen

Review Date

Additional Comments

Cancel   Save

### 3. Edit and complete the document information data fields.


File categories have been developed based on the \_

[https://www.wa.gov.au/system/files/2025-01/appendix\\_d\\_evidence\\_guidelines\\_0.pdf](https://www.wa.gov.au/system/files/2025-01/appendix_d_evidence_guidelines_0.pdf).

The *File Category* is linked to the applicable *Performance Outcomes*. For example, if the file category = annual report - POs 1-7 will be available for selection. Whereas if the file category = Structure – Governance - only PO4 is available for selection.

### 4. Use the directional arrows to move the correct performance outcome which applies to the document you uploaded from the *Available* window to the *Chosen* window.

**Note:** Filename, File Category and Performance Outcome data fields are mandatory when you are editing document details, if these fields are not populated when you click on the Save button an error message will appear.



### Edit Document

\* Filename

Complete this field.

\* File Category

--None--

Complete this field.

Performance Outcome

Available

▶

◀

Chosen

Review Date

📅

Additional Comments

Cancel

Save

5. Enter a review date (optional). The review date will trigger a notification to the provider that the document requires review.

### Edit Document

Filename

• File Category

Financial reports and statements ▼

• Performance Outcome

Available

PO2. Housing Assets

PO4. Governance

PO7. Financial Viability

▶  
◀

Chosen

PO6. Management

Review Date

22 July 2026 📅

Additional Comments

New version of Financial Register

Cancel
Save

- a. Once you have completed populating the data fields, **click on the Save button**. The portal validates the data entered; all saved information is automatically displayed in the corresponding row of the Evidence Manager records list as shown in the image below.

	Evidence Number	Filename	File Category	Performance Outcome	Review Date	Uploaded Date	
1	EV-202501-12	Financial Register Docume...	Financial reports and state...	PO6. Management	22/07/2026	31/01/2025	

## 6. Delete an uploaded document


This function is not available for an evidence document that is attached to a Return that has the status "Return Submitted" or "Closed".

Once an evidence document has been attached to a Return, and the Return has been submitted for approval, no changes can be made to the document while the Return is being assessed. This is to ensure that the assessment process is not compromised. Once a return has been approved and closed, you will be unable to remove the document link to the return or make changes to the document. You will however be able to upload a new version. This is to ensure a clear and auditable record of the submission.

Evidence documents that have been uploaded to the Evidence Manager and have not been attached to a Return can be deleted. You can also delete evidence documents that are attached to a Return which has the status "Return In Progress" and "Return Reopened"

If there are circumstances where you require a document to be deleted after you have submitted your return, please contact your analyst and they can request the deletion of the document.

1. To delete a document, **click on the down arrow button** located on the far-right hand side of the document row and **select the delete button**



PROVIDERS							Search...	🔔	👤
Account	Contacts	Properties	Returns	Evidence Manager					
Account > Jasmin Test							Upload	Export	
Latest Evidence (7)							🔍	🔄	
	Evidence Number	Filename	File Category	Performance Outcome	Review Date	Uploaded Date			
1	EV-202501-12	Financial Register Docume...	Financial reports and state...	PO6. Management	22/07/2026	31/01/2025	⋮		
2	EV-202501-13	Business plan.docx	Business Plan	PO1. Tenant and Housing S...	23/06/2025	31/01/2025	⋮		
3	EV-202501-14	evidence-guidelines.pdf	Engagement activities - co...	PO3. Community Engagem...	08/10/2025	31/01/2025	⋮		
4	EV-202501-16	Organisational Chart.docx	Structure - Corporate and c...	PO6. Management		31/01/2025	⋮		
5	EV-202501-17	Policy document.docx	Policies and procedures	PO1. Tenant and Housing S...		31/01/2025	⋮		

2. **Delete Document** confirmation window appears, confirming if you would like to delete the document, **click on the OK button to delete document**

Delete Document

Are you sure you want to delete this document?

Cancel
OK



3. A success message appears on the page confirming that the document has been successfully deleted from Evidence Manager and the document record no longer appears in the list.

**PROVIDERS**

Account   Contacts   Properties

**Success**  
Successfully deleted the document.

Search...

Account > Jasmin Test

Upload   Export

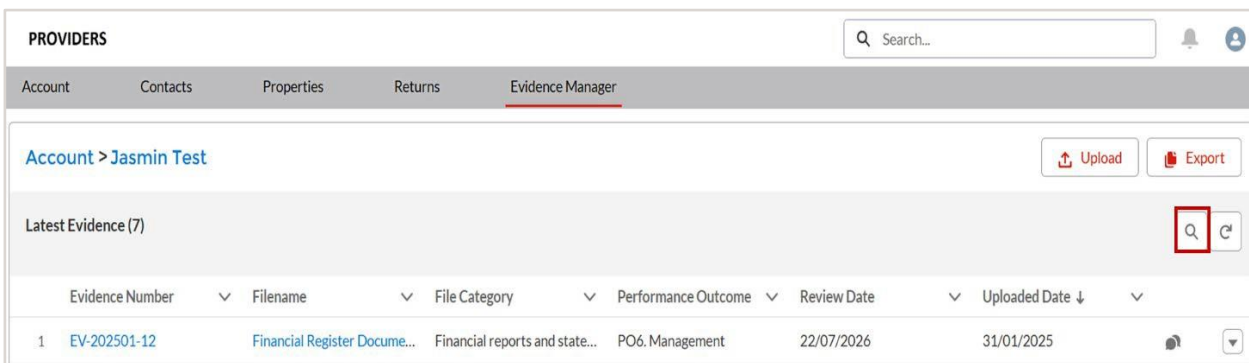
Latest Evidence (7)

Evidence Number	Filename	File Category	Performance Outcome	Review Date	Uploaded Date	
1 EV-202501-12	Financial Register Docume...	Financial reports and state...	PO6. Management	22/07/2026	31/01/2025	
2 EV-202501-13	Business plan.docx	Business Plan	PO1. Tenant and Housing S...	23/06/2025	31/01/2025	
3 EV-202501-14	evidence-guidelines.pdf	Engagement activities - co...	PO3. Community Engagem...	08/10/2025	31/01/2025	
4 EV-202501-16	Organisational Chart.docx	Structure - Corporate and c...	PO6. Management		31/01/2025	
5 EV-202501-17	Policy document.docx	Policies and procedures	PO1. Tenant and Housing S...		31/01/2025	
6 EV-202501-18	procedure.docx	Policies and procedures	PO1. Tenant and Housing S...	22/07/2026	31/01/2025	
7 EV-202501-20	metrics-and-indicators.pdf	Agreements and contracts ...	PO2. Housing Assets	31/03/2026	31/01/2025	

## 7. Search documents within Evidence Manager lists

1. To search for an existing document in the Evidence Manager list, click **on the magnifying glass** button located on the top right-hand side of the page. A search bar appears below the magnifying glass image as shown in the image below.

**Note:** Evidence Manager includes two lists: Latest Documents and All Documents. There are dedicated search bars for each list, the search bars operate independently to ensure a focused search within the respective lists.



PROVIDERS

Account Contacts Properties Returns Evidence Manager

Account > Jasmin Test

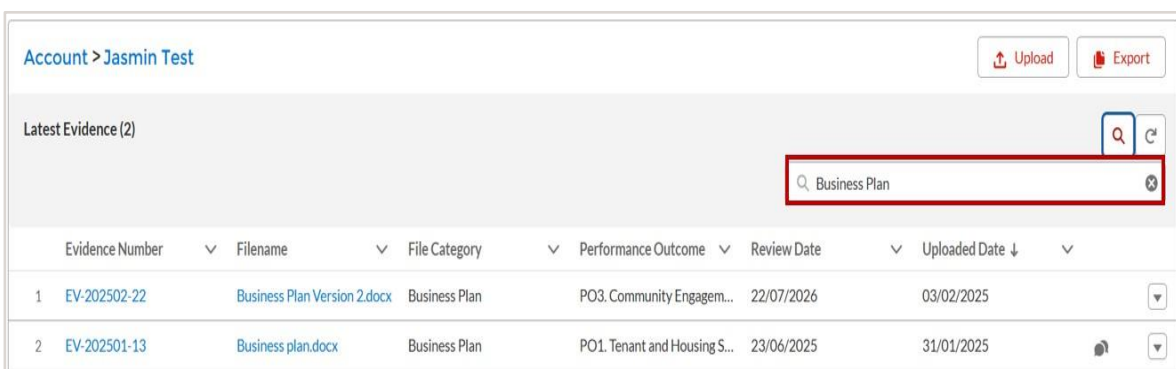
Upload Export

Latest Evidence (7)

Search

Evidence Number	Filename	File Category	Performance Outcome	Review Date	Uploaded Date
1 EV-202501-12	Financial Register Docume...	Financial reports and state...	PO6. Management	22/07/2026	31/01/2025

2. Enter a **Filename** or **File Category** within the search bar and click on the **enter button** or the **magnifying glass button**. Example "Business Plan". The portal will return results that match the entered criteria. As you can see in the example below, Business Plan was entered and only the Business Plan document records are displayed within the search results.



Account > Jasmin Test

Upload Export

Latest Evidence (2)

Search Business Plan



Evidence Number	Filename	File Category	Performance Outcome	Review Date	Uploaded Date
1 EV-202502-22	Business Plan Version 2.docx	Business Plan	PO3. Community Engagem...	22/07/2026	03/02/2025
2 EV-202501-13	Business plan.docx	Business Plan	PO1. Tenant and Housing S...	23/06/2025	31/01/2025

## 8. Preview and download document

1. To preview a document and view snapshot of key details, **locate the document record within the Evidence Manager list and click on the down arrow button located on the far-right hand side of the document row**
2. Click on the **More Details** button

PROVIDERS

Q Search...



Account

Contacts

Properties

Returns

Evidence Manager

Account > Jasmin Test

Upload

Export

Latest Evidence (8)

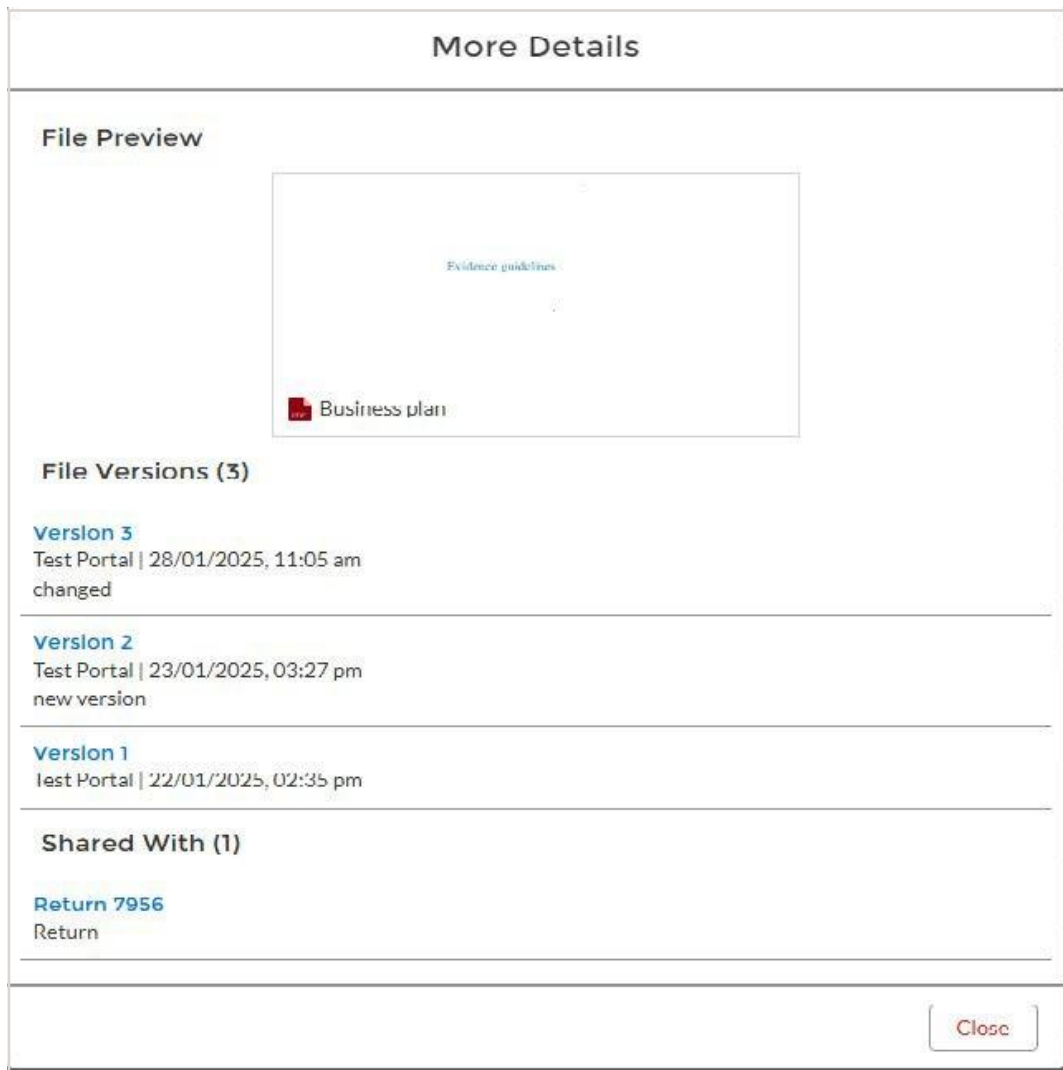
Q Search by file name or category...

Q

↺

	Evidence Number	▼	Filename	▼	File Category	▼	Performance Outcome	▼	Review Date	▼	Uploaded Date	↓	▼
1	EV-202502-22		Business Plan Version 2.docx		Business Plan		PO3. Community Engagem...		22/07/2026		03/02/2025		▼
2	EV-202501-13		Business plan.docx		Business Plan		PO1. Tenant and Housing S...		23/06/2025		31/01/2025		▼
3	EV-202501-14		evidence-guidelines.pdf		Engagement activities - co...		PO3. Community Engagem...		08/10/2025		31/01/2025		▼
4	EV-202501-16		Organisational Chart.docx		Structure - Corporate and c...		PO6. Management				31/01/2025		▼
5	EV-202501-12		Financial Register Docume...		Financial reports and state...		PO6. Management		22/07/2026		31/01/2025		▼
6	EV-202501-18		procedure.docx		Policies and procedures		PO1. Tenant and Housing S...		22/07/2026		31/01/2025		▼
7	EV-202501-20		metrics-and-indicators.pdf		Agreements and contracts ...		PO2. Housing Assets		31/03/2026		31/01/2025		▼
8	EV-202501-17		Policy document.docx		Policies and procedures		PO1. Tenant and Housing S...				31/01/2025		▼

3. The **More Details** window appears displaying a snapshot of the file and its key details:
  - **Version History hyperlink** – Click on the version history hyperlinks displayed in blue e.g. “Version 3” to download that version of the document
  - **Return hyperlink** – Click on the Return hyperlink displayed in blue to navigate to the Returns page

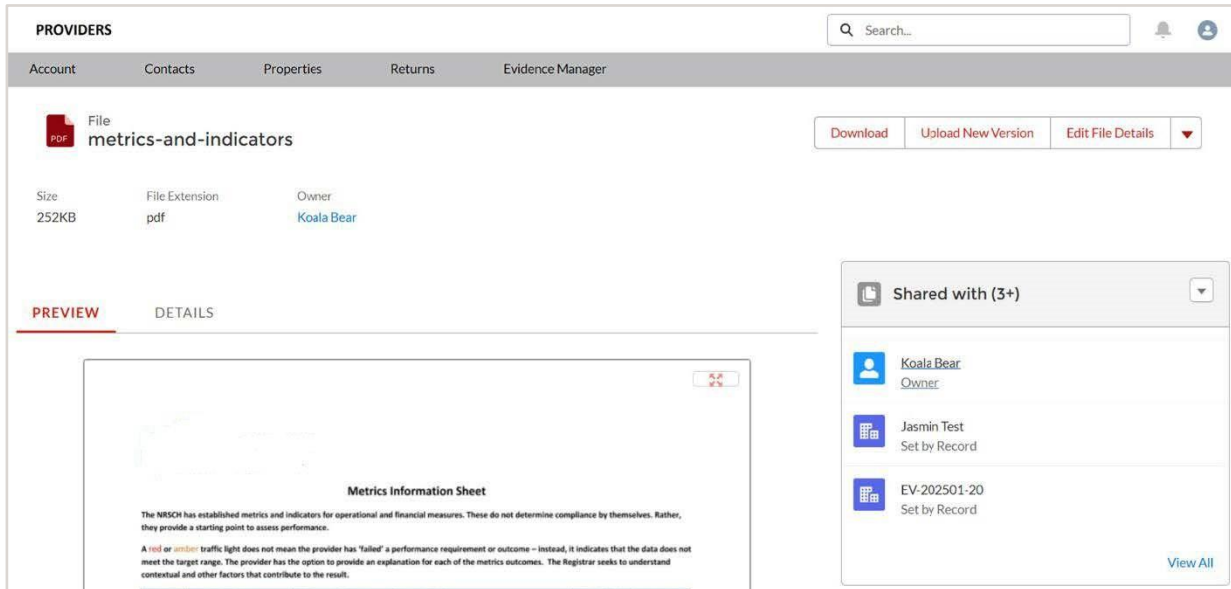


You can also preview a document by locating the document record within the Evidence Manager list and clicking on the filename link.

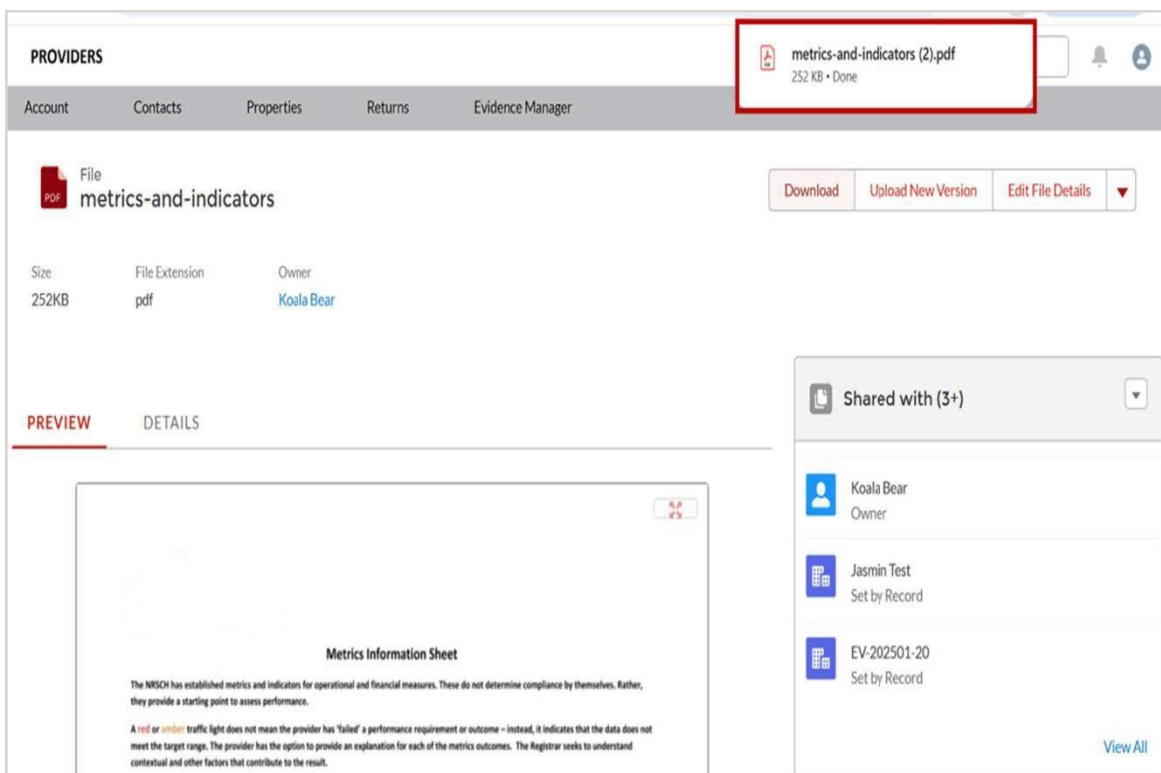
Account > Jasmin Test							Upload	Export
Latest Evidence (8)								Q
Evidence Number	Filename	File Category	Performance Outcome	Review Date	Uploaded Date			
1	EV-202502-23	metrics-and-indicators.pdf	Monitoring systems and m...	PO1. Tenant and Housing S...	16/07/2026	03/02/2025		

You will be navigated to the File Preview screen where you can perform the following functions:

- Preview document
- Download document
- Upload new version of the document
- Edit file details



4. To view the details of the document, **click on the Details tab** located next to the Preview tab as shown in the image above.
5. To download the document, **click on the download button** located on the top right-hand side of the menu bar on the document file details page



## 9. Supplementary Evidence

If the evidence submitted is not sufficient the regulator may seek further clarification through lines of enquiry and/or request supplementary evidence to reach a decision about registration or compliance. The scope of this activity will be consistent with the performance outcome(s) and of a type that is best suited to gathering the evidence with the minimum burden to the provider.

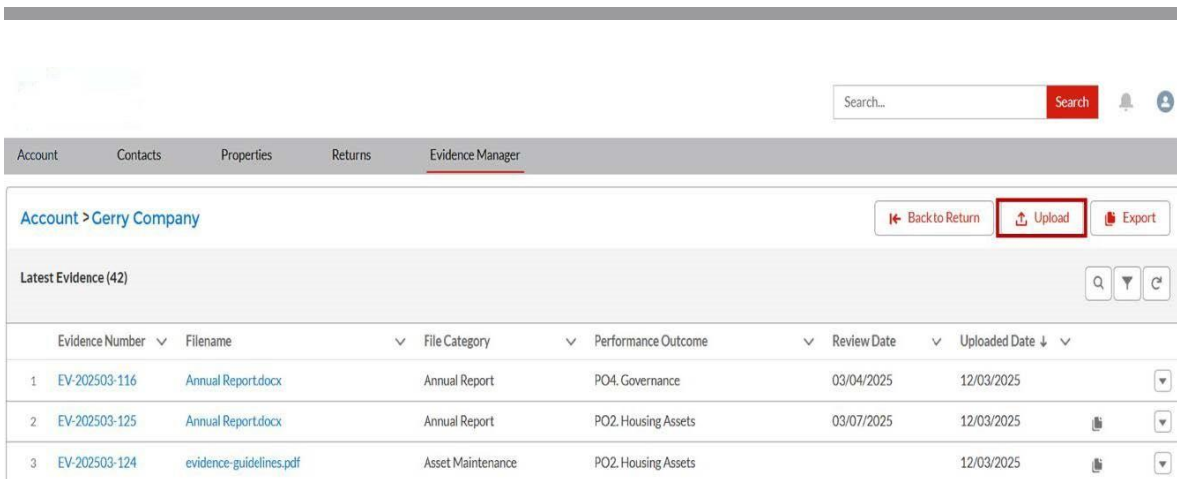
1. To add Supplementary evidence documents to a Return, **click on the Add Supplementary button**

The screenshot shows the 'Evidence Manager' tab in a web application. At the top, there's a search bar and navigation tabs: Account, Contacts, Properties, Returns, and Evidence Manager. Below the tabs, a 'Return' for 'Gerry Company' is displayed with details like Form Reference (Return 7956), Tier, Return Due Date (2/7/2024), Return Submitted Date, and Form Status (Return Submitted). There are 'Printable View' and 'Edit Return' buttons. Below this, there are tabs for 'Details', 'Evidence Documents' (which is active), and 'Provider Report'. Under 'Evidence Documents', there's a table with 6 items. The table has columns: Evidence Number, Filename, File Category, Performance Outcome, and Supplementary. The first two items are: 1. EV-202503-112, Draft determination report.docx, Assets Management, PO2. Housing Assets, and 2. EV-202502-109, Business Plan V2.docx, Annual Report, PO1. Tenant and Housing Services. An 'Add Supplementary' button is highlighted with a red box in the top right corner of the table area.

2. The Select Documents page will appear, displaying a list of all supplementary evidence documents that have already been uploaded to Evidence Manager. **Click on the New Document button**

The screenshot shows the 'Select Documents' page. It has a search bar at the top with the placeholder text 'Search by file name or category...'. Below the search bar is a table with columns: Evidence Number, Filename, File Category, Performance Outcome, Review Date, and Uploaded Date. The table contains two items: 1. EV-202503-124, evidence-guidelines.pdf, Asset Maintenance, PO2. Housing Assets, and 2. EV-202503-125, Annual Report.docx, Annual Report, PO2. Housing Assets, 03/07/2025, 12/03/2025. At the bottom left, there is a 'New Document' button. At the bottom right, there are 'Cancel' and 'Add' buttons.

3. The Evidence Manager page will appear, **click on the Upload button**, to upload new supplementary documents to Evidence Manager



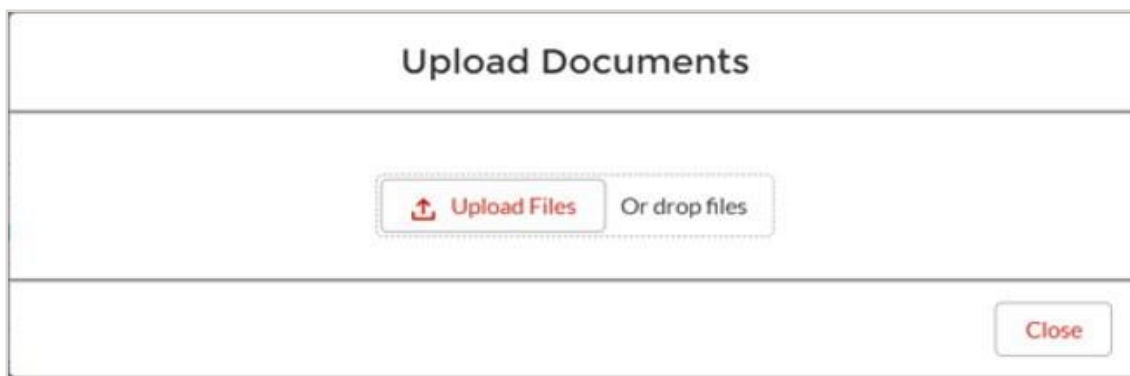
Account > Gerry Company

Back to Return Upload Export

Latest Evidence (42)

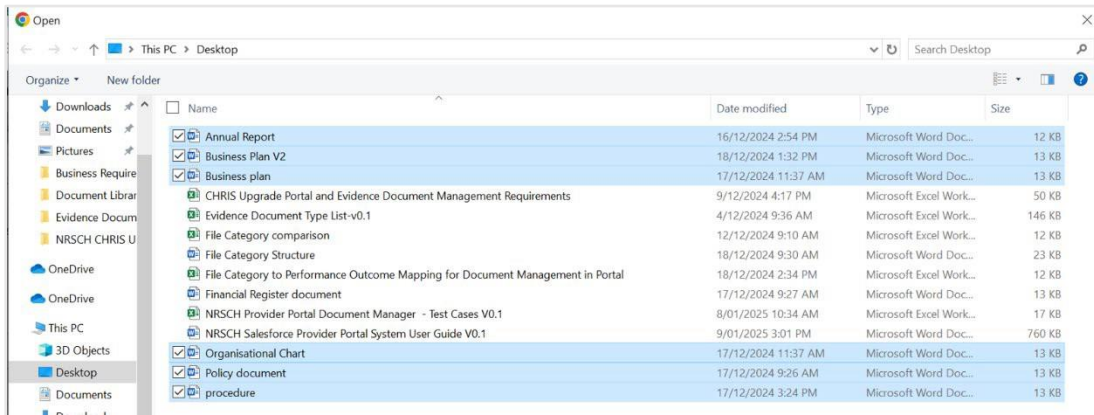
Evidence Number	Filename	File Category	Performance Outcome	Review Date	Uploaded Date
1 EV-202503-116	Annual Report.docx	Annual Report	PO4. Governance	03/04/2025	12/03/2025
2 EV-202503-125	Annual Report.docx	Annual Report	PO2. Housing Assets	03/07/2025	12/03/2025
3 EV-202503-124	evidence-guidelines.pdf	Asset Maintenance	PO2. Housing Assets		12/03/2025

The “Upload documents” pop up window appears.

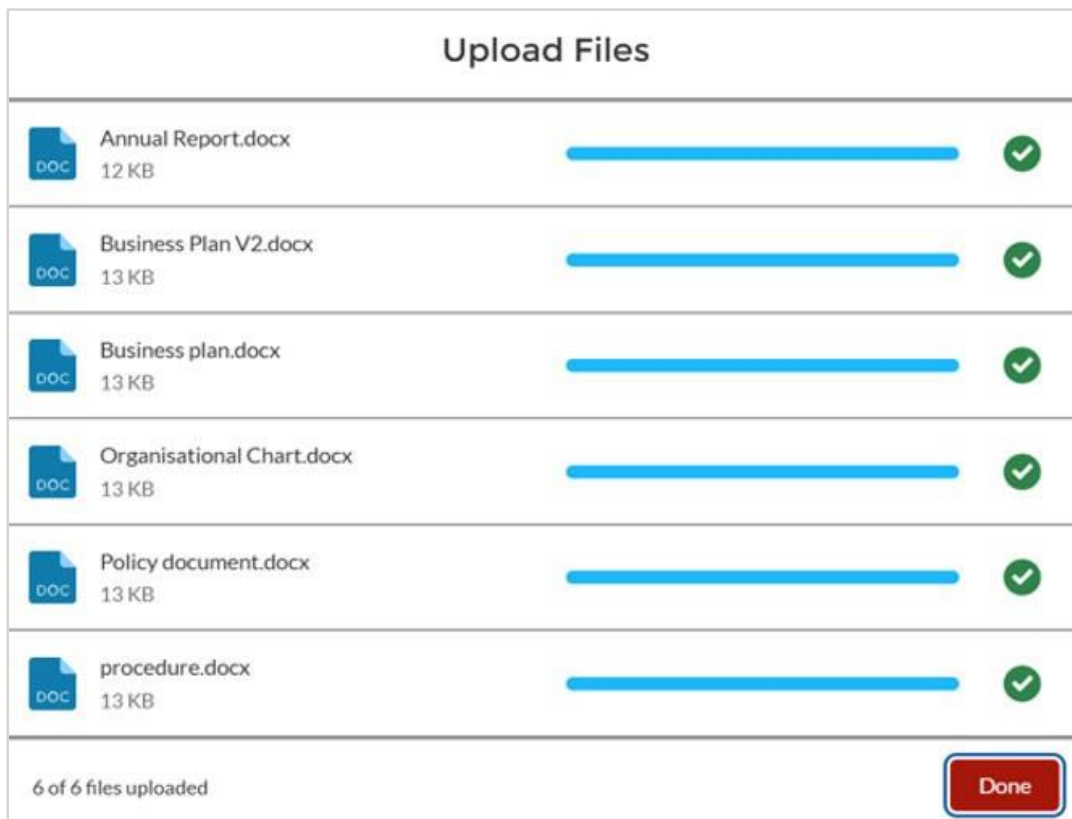


4. You have two options for uploading your supplementary evidence documents:

- **Option 1: Drag and Drop Files** – Drag and drop the documents you want to upload:
  - Open file explorer on your computer
  - Select the files you want to drag and drop to the “or drop files” box. Release the mouse button to drop the files into the drop files area. You must drop the files within the dotted line box for this to work successfully.
- **Option 2: Upload Files**
  - Click on the Upload Files button
  - File explorer opens on your computer
  - Select the files you want to upload (Maximum you can select is 10) and click on the Open button.



- The Upload Files window appears displaying a progress bar as the files are uploading.



- Click on the **Done** button once all supplementary documents are uploaded. Files are uploaded when the blue bar is complete, and a green tick is shown against each file.
- Supplementary Documents have now been successfully uploaded to the Evidence list as displayed in the image below. If a supplementary document has been added, you will see this symbol against a document record.





<div> <div>Search...</div> <div>Search</div> <div></div> <div></div> </div>						
<div> <div>Account</div> <div>Contacts</div> <div>Properties</div> <div>Returns</div> <div><u>Evidence Manager</u></div> </div>						
<div> <div>Account &gt; Gerry Company</div> <div> <div>Back to Return</div> <div>Upload</div> <div>Export</div> </div> </div>						
<div> <div>Latest Evidence (48)</div> <div> <div></div> <div></div> <div></div> </div> </div>						
Evidence Number	Filename	File Category	Performance Outcome	Review Date	Uploaded Date	
1 EV-202503-128	Business plan.docx	Business Plan	PO2. Housing Assets	26/02/2026	14/03/2025	
2 EV-202503-127	Business Plan V2.docx	Business Plan	PO3. Community Engagement	31/12/2025	14/03/2025	
3 EV-202503-126	Annual Report.docx	Annual Report	PO2. Housing Assets		14/03/2025	
4 EV-202503-131	procedure.docx	Policies and Procedures	PO4. Governance	22/08/2025	14/03/2025	
5 EV-202503-130	Policy document.docx	Policies and Procedures	PO3. Community Engagement		14/03/2025	
6 EV-202503-129	Organisational Chart.docx	Delegations	PO4. Governance		14/03/2025	

8. Click on the **Back to Return** button, user is navigated back to the Returns – Evidence Documents page, click on the **Add Supplementary** button

9. The **Select Documents** page will appear, displaying a list of all supplementary evidence documents uploaded in Evidence Manager. Select the documents you want to add to the return by clicking on the checkboxes beside the document record. **Click on the Add button to add the documents to the Return**

Select Documents						
<div> <div>Q. Search by file name or category...</div> </div>						
<input type="checkbox"/>	Evidence Number	Filename	File Category	Performance Outcome	Review Date	Uploaded Date
<input checked="" type="checkbox"/>	1 EV-202503-131	procedure.docx	Policies and Procedures	PO4. Governance	22/08/2025	14/03/2025
<input checked="" type="checkbox"/>	2 EV-202503-129	Organisational Chart.docx	Delegations	PO4. Governance		14/03/2025
<input checked="" type="checkbox"/>	3 EV-202503-130	Policy document.docx	Policies and Procedures	PO3. Community Engagement		14/03/2025
<input checked="" type="checkbox"/>	4 EV-202503-126	Annual Report.docx	Annual Report	PO2. Housing Assets		14/03/2025
<input checked="" type="checkbox"/>	5 EV-202503-127	Business Plan V2.docx	Business Plan	PO3. Community Engagement	31/12/2025	14/03/2025
<input checked="" type="checkbox"/>	6 EV-202503-128	Business plan.docx	Business Plan	PO2. Housing Assets	26/02/2026	14/03/2025
<input type="checkbox"/>	7 EV-202503-125	Annual Report.docx	Annual Report	PO2. Housing Assets	03/07/2025	12/03/2025
<input type="checkbox"/>	8 EV-202503-124	evidence-guidelines.pdf	Asset Maintenance	PO2. Housing Assets		12/03/2025
<div> <div>New Document</div> <div>Cancel</div> <div>Add</div> </div>						

**10.**Supplementary documents have now been added to the Return

Account

Contacts

Properties

Returns

Evidence Manager

Return

Gerry Company

Printable View

Edit Return

Form Reference

Tier

Return Due Date

Return Submitted Date

Form Status

Return 7956

2/7/2024

Return Submitted

Details

**Evidence Documents**

Provider Report

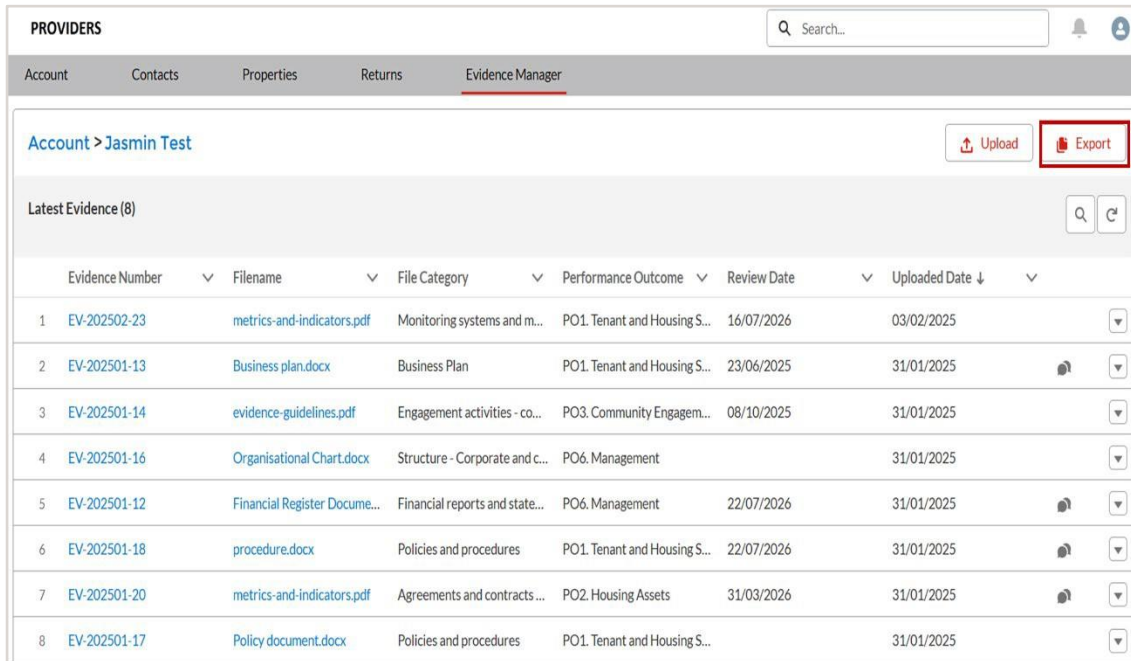
Evidence (12)

Add Supplementary

	<input type="checkbox"/> Evidence Number	<input type="checkbox"/> Filename	<input type="checkbox"/> File Category	<input type="checkbox"/> Performance Outcome	<input type="checkbox"/> Supplementary
1	<input type="checkbox"/> EV-202503-131	<a href="#">procedure.docx</a>	Policies and Procedures	PO4. Governance	<input checked="" type="checkbox"/>
2	<input type="checkbox"/> EV-202503-126	<a href="#">Annual Report.docx</a>	Annual Report	PO2. Housing Assets	<input checked="" type="checkbox"/>
3	<input type="checkbox"/> EV-202503-127	<a href="#">Business Plan V2.docx</a>	Business Plan	PO3. Community Engagement	<input checked="" type="checkbox"/>
4	<input type="checkbox"/> EV-202503-128	<a href="#">Business plan.docx</a>	Business Plan	PO2. Housing Assets	<input checked="" type="checkbox"/>
5	<input type="checkbox"/> EV-202503-129	<a href="#">Organisational Chart.docx</a>	Delegations	PO4. Governance	<input checked="" type="checkbox"/>
6	<input type="checkbox"/> EV-202503-130	<a href="#">Policy document.docx</a>	Policies and Procedures	PO3. Community Engagement	<input checked="" type="checkbox"/>

# 10. Export Evidence Manager List

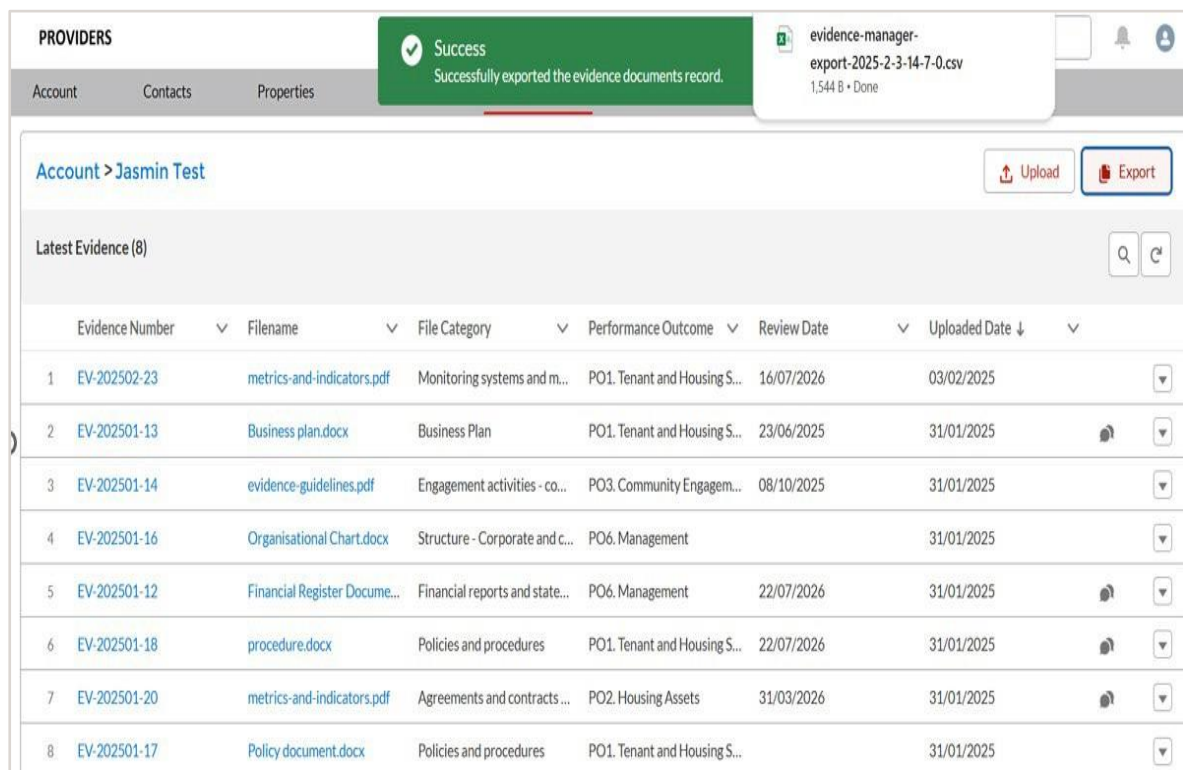
1. To export the list of evidence, **click on the Export Button** located on the top right-hand side of the **Evidence Manager** list page.



The screenshot shows the 'PROVIDERS' interface with the 'Evidence Manager' tab selected. The breadcrumb is 'Account > Jasmin Test'. In the top right corner, there are 'Upload' and 'Export' buttons. The 'Export' button is highlighted with a red rectangle. Below the buttons, there is a table titled 'Latest Evidence (8)' with 8 rows of evidence records. Each row contains columns for Evidence Number, Filename, File Category, Performance Outcome, Review Date, and Uploaded Date.

Evidence Number	Filename	File Category	Performance Outcome	Review Date	Uploaded Date
1	EV-202502-23	metrics-and-indicators.pdf	Monitoring systems and m...	PO1. Tenant and Housing S...	16/07/2026
2	EV-202501-13	Business plan.docx	Business Plan	PO1. Tenant and Housing S...	23/06/2025
3	EV-202501-14	evidence-guidelines.pdf	Engagement activities - co...	PO3. Community Engagem...	08/10/2025
4	EV-202501-16	Organisational Chart.docx	Structure - Corporate and c...	PO6. Management	
5	EV-202501-12	Financial Register Docume...	Financial reports and state...	PO6. Management	22/07/2026
6	EV-202501-18	procedure.docx	Policies and procedures	PO1. Tenant and Housing S...	22/07/2026
7	EV-202501-20	metrics-and-indicators.pdf	Agreements and contracts ...	PO2. Housing Assets	31/03/2026
8	EV-202501-17	Policy document.docx	Policies and procedures	PO1. Tenant and Housing S...	

2. The Evidence Manager export csv file displaying all document records will be downloaded to your desktop and a success message will appear advising that you have successfully exported the documents record



The screenshot shows the 'PROVIDERS' interface with the 'Evidence Manager' tab selected. A green success message banner is displayed at the top, stating 'Success Successfully exported the evidence documents record.' and 'evidence-manager-export-2025-2-3-14-7-0.csv 1,544 B • Done'. The breadcrumb is 'Account > Jasmin Test'. In the top right corner, there are 'Upload' and 'Export' buttons. The 'Export' button is highlighted with a red rectangle. Below the buttons, there is a table titled 'Latest Evidence (8)' with 8 rows of evidence records. Each row contains columns for Evidence Number, Filename, File Category, Performance Outcome, Review Date, and Uploaded Date.

Evidence Number	Filename	File Category	Performance Outcome	Review Date	Uploaded Date
1	EV-202502-23	metrics-and-indicators.pdf	Monitoring systems and m...	PO1. Tenant and Housing S...	16/07/2026
2	EV-202501-13	Business plan.docx	Business Plan	PO1. Tenant and Housing S...	23/06/2025
3	EV-202501-14	evidence-guidelines.pdf	Engagement activities - co...	PO3. Community Engagem...	08/10/2025
4	EV-202501-16	Organisational Chart.docx	Structure - Corporate and c...	PO6. Management	
5	EV-202501-12	Financial Register Docume...	Financial reports and state...	PO6. Management	22/07/2026
6	EV-202501-18	procedure.docx	Policies and procedures	PO1. Tenant and Housing S...	22/07/2026
7	EV-202501-20	metrics-and-indicators.pdf	Agreements and contracts ...	PO2. Housing Assets	31/03/2026
8	EV-202501-17	Policy document.docx	Policies and procedures	PO1. Tenant and Housing S...	

# 11. Evidence Manager Business Rules

**Scenario 1:** The Provider has uploaded new evidence documents to the Evidence Manager but has not been yet attached them to a Return. Within the portal, the provider can edit, delete, or upload a new version of the document in the Evidence Manager

**Business Rule 1:** Providers can edit, delete, or upload a new version of evidence documents if the documents have not been associated to a return

**Scenario 2:** The Provider has started editing the Return the status is “Return in Progress”, the Provider is able to edit, delete and upload new versions of the evidence documents.

**Business Rule 2:** The provider can edit, delete, and upload new versions of evidence documents whilst the Return has a status of ‘Return in progress’.

**Scenario 3:** If an analyst has rejected a Return the status changes from “Return Submitted” too “Return Reopened” the provider is again permitted to edit, delete, and upload new versions of the evidence documents

**Business Rule 3:** The provider can edit, delete, and upload new versions of the evidence documents whilst the Return has a status of ‘Return reopened’.

**Scenario 4:** Provider has attached all evidence documents from the Evidence Manager to a Return and has submitted it for approval. Status of Return changes to “Return Submitted”, Providers can no longer edit, delete or upload a new version of those evidence documents within the Evidence Manager

**Business Rule 4:** To maintain the integrity, accuracy, and compliance of submitted returns, providers cannot edit, delete or upload a new version of the evidence document once the document has been attached to a return and submitted for approval, that is the Return status is ‘Return submitted’.

**Scenario 5:** The analyst has approved the Final Determination Report and the status of the Return changes from “Return Submitted” to “Closed”. The Provider cannot delete the evidence documents that are attached to the Return that has been approved and now has the status of “Closed”. They will still be able upload a new version of the document and edit document details

**Business Rule 5:** The Provider cannot delete the evidence documentation attached to the return once the return is approved and closed. This is to ensure a clear and auditable record of the return submission is maintained. Providers can still upload a new version of the document and edit document details

**Scenario 6: Once a Return has been submitted for approval and the status changes from “Return in Progress” too “Return Submitted” the Provider is no longer able to disassociate an evidence document from the Return. This restriction also applies when the Return has been approved and is marked with status “Closed”**

**Business Rule 6:** Providers cannot disassociate evidence documents from the return when the return status is 'Return submitted' or 'Closed'. Evidence documents must remain linked to ensure integrity and traceability of submitted and approved returns.

Document Owner: Community Housing Registration Office (CHRO)

Objective TBC

Classification: Guidance

Applicability: Providers seeking registration or registered under the Community Housing Regulatory Framework

Document History

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