

Manage Account Data

CHRIS guide for community housing providers

OFFICIAL

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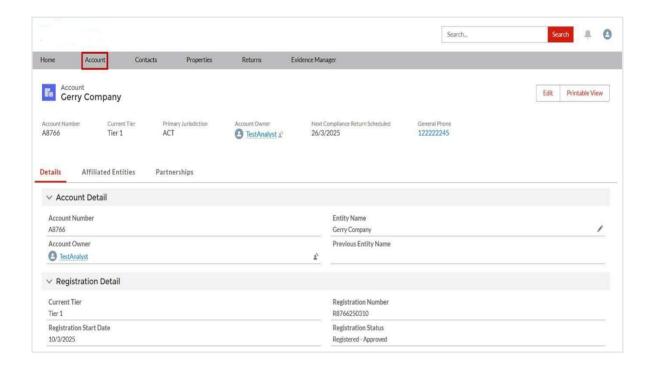
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Manage Account Data

This document provides detailed systems steps for the update of data held on the Account object. This includes:

- Entity details
- Address and contact details
- Main client groups and primary product and services
- Other regulatory bodies
- Affiliated entities
- · Partnerships links

To view the **Accounts** page, click on the object marked **Accounts**

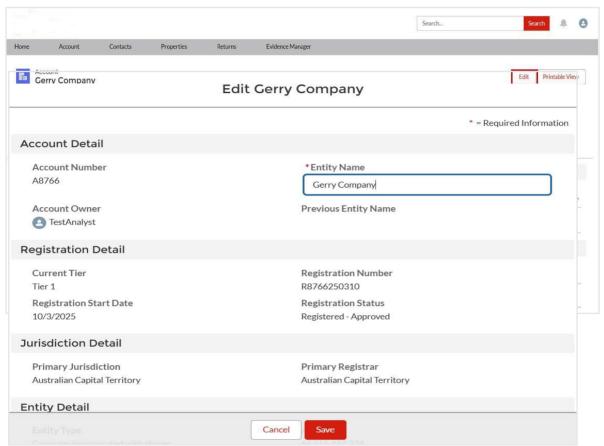


The Nominated Main Contact (NMC) can update the details on the Account page at any time.

Some details like jurisdiction, number of community housing assets registration and compliance details cannot be changed by the NMC and will be automatically updated by the system based on information submitted at registration or compliance assessments.

1.1 Editing provider details

1. To edit account details, click on the 'Edit' button located at the top right-hand corner of the Accounts page, OR click the pen icon to enable inline editing, make your updates, and click Save. All changes will be automatically applied.



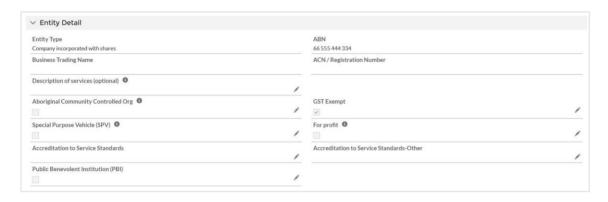
2. The Edit Account details page appears, update account details and click on the 'save' button. It is recommended that users save whenever they are entering new data changes as work may be lost if the tab or browser is closed.



Note: Navigate through the system by using the Menu bar links located at the top of the screen by clicking on Account, Contacts, Evidence Manager, or Returns, rather than clicking the back button on the browser. Pressing back will return you to the last completed action and start an endless loop or result in work being lost.

1.2 Entity Details

This section records the details of your organisation and assists in developing a more detailed profile of the provider.



Description of services –The information recorded includes a description of your organisation, including the main client group and context of the organisation.

Aboriginal Community Controlled Organisation (ACCO) – Select this box if your organisation is an Aboriginal or Torres Strait Islander Community Controlled Organisation (ATSICCO). This information is used for reporting trends and developing profiles of registered CHPs. When selecting this tick box your organisation will appear in the ACCO search on the National Provider Register.

Special Purpose Vehicle (SPV) – Select this box if your organisation is a Special Purpose Vehicle.

For Profit – Select this box if your organisation is not a charitable or other type of not-for profit organisation. This information is used for reporting trends and developing profiles of registered CHPs. When selecting this tick box your organisation will appear in the for-profit search on the WA Register.

1.3 Overview – Account details, Affiliated entities and partnerships tabs

On the account page there are 3 tabs

- Details Account details
- Affiliated Entities Affiliated Entities details
- Partnerships Partnership details

Clicking on these tabs, directs the user to those specific tab pages where they can update new account details, create new affiliated entities and partnerships, or edit existing details.

1.3.1 Deleting contacts, affiliated entities and partnerships

Providers cannot delete entries that have been created and saved. These are maintained to comply with audit requirements.

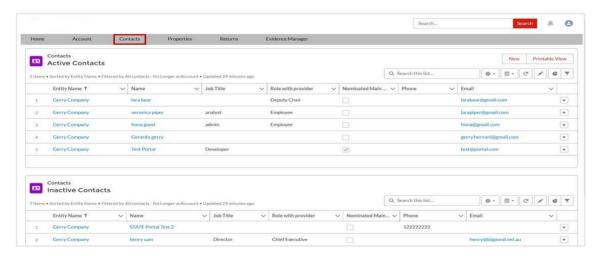


Where an affiliated entity or partnership is no longer in place they cannot be deleted but the arrangement can be edited to show its end date. Placing an end date against the arrangement will move the contact, affiliated entity or partnership from an active record to an inactive record.

If a contact, affiliated entity or partnership was created in error (e.g. a duplicate entry was made) you should contact your analyst who will organise for the entry to be deleted.

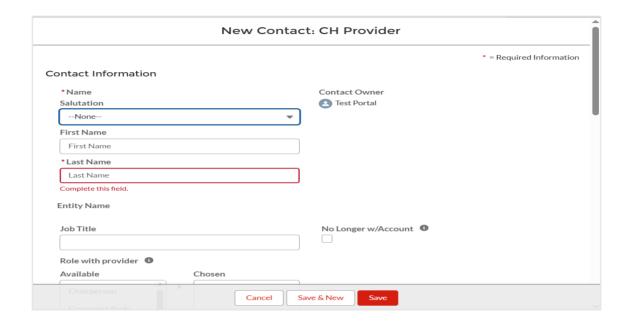
1.4 Contacts

The Contacts page provides information on contacts associated with the provider's account. Contacts are divided into two groups on the screen active and non-active.

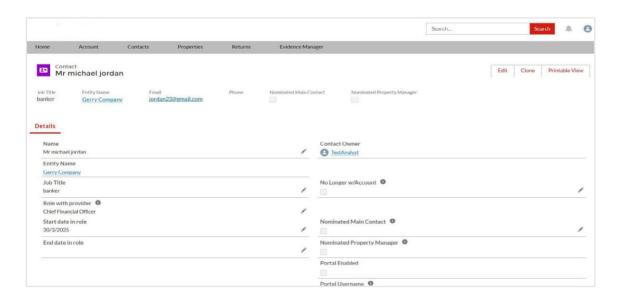


1.4.1 Create a new contact

- 1. Users can create a new contact by clicking on New button located on the top righthand side of the page.
- 2. The new Contact: CH provider pop up window appears, enter new contact details and click ono the Save Button.



3. The New contact details have been saved, and the user is navigated to the Contact Details page. The new Contact details will now appear within the Active Contacts list on the contacts page

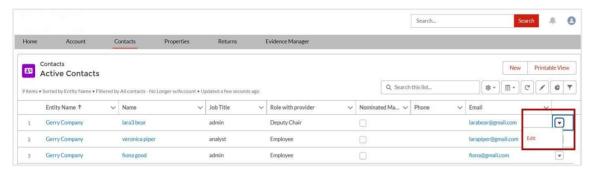


You can add as many contacts as you like however only **one person can be nominated as a contact person**. All correspondence and enquires through the system (CHRIS) will be sent to the nominated contact person (NMC).

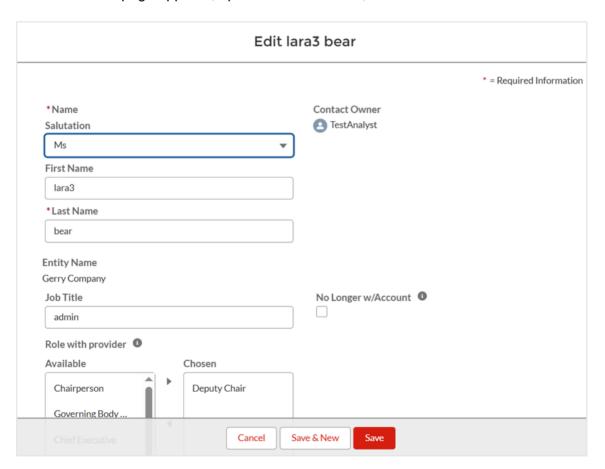
1.4.2 Edit a contact

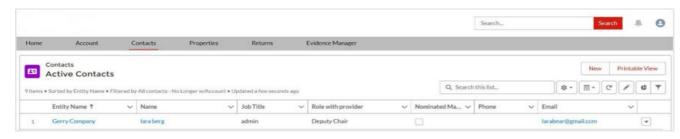
You can edit most of the fields **including the Name.** Contacts should include key persons in the organisation.

1. To edit a contact record, click on the arrow down button located on the right-hand side of the contact record, a menu will appear. Click on the **Edit** button and the user will be navigated to the edit contact page.



2. Edit contact page appears, update contact details, click on the Save button.

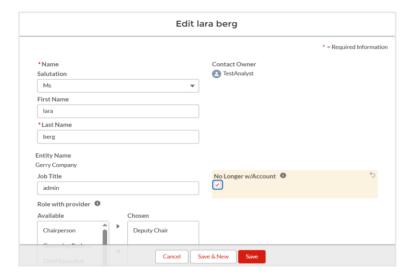




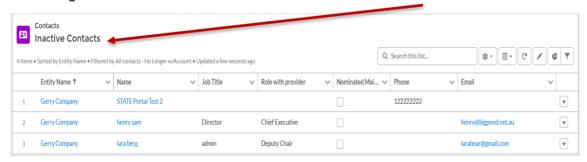
3. User is navigated to the Contact page where the contact record name has been updated.



4. Where an existing contact has left the providers employment you can edit the entry to show they are no longer associated with the organisation. In this example, "Lara Berg" is an Active Contact. Edit contact details and select the "No Longer w/Account" tick box and click on the Save button.



Lara Berg contact record is now located in the Inactive Contacts list



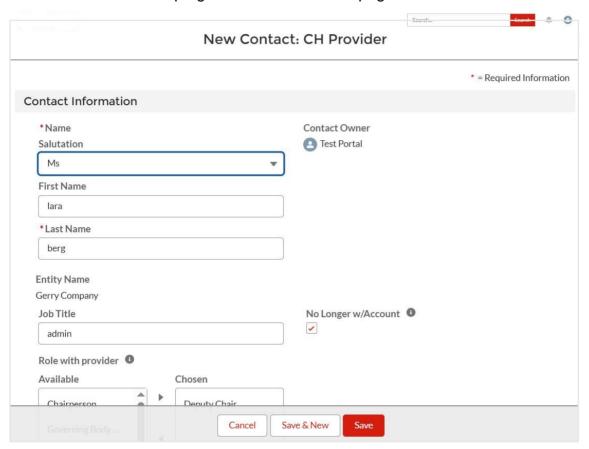
Contacts cannot be deleted from the list. This is to ensure an auditable history is maintained. You can edit the contact's name.

1.4.3 Create multiple contacts - clone a record

If you have multiple contacts with similar details, you can select *Clone* on an existing contact record.

Please use caution when using the Clone function to ensure that the record is updated correctly.

1. Navigate to the Contact Records details page and click on the **Clone button** located on the top right-hand corner of the page

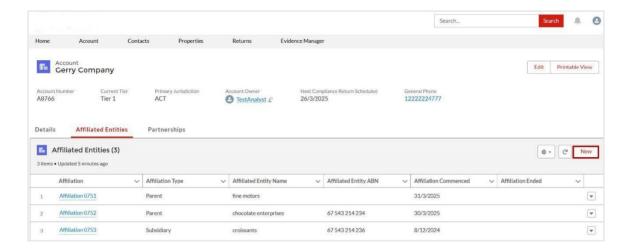


This will open the cloned record in **Edit** mode, and you can update the details as necessary and **save.**.

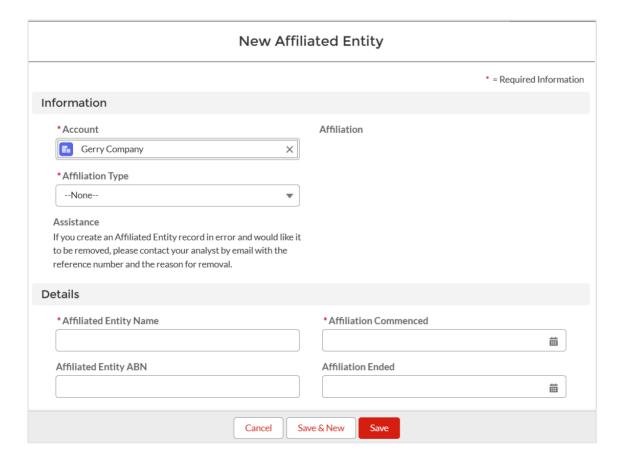
1.5 Affiliated Entities

The 'Affiliated Entities' tab located on the Accounts page is where all affiliated entities are listed.

1. Create a new entry by clicking on the New button.



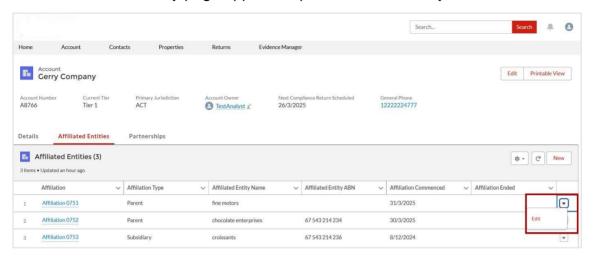
2. Complete new affiliated entity details and click on the Save button

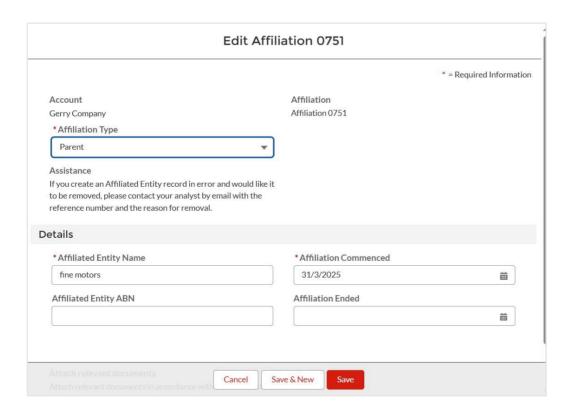


1.5.1 Edit an affiliated entity

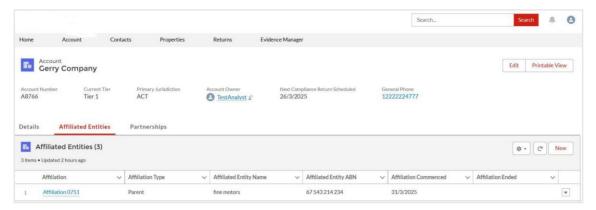
Edit details about an existing affiliated entity listing by clicking on the arrow down button located on the right-hand side of the affiliated entity record, a menu will appear.

- 1. Click on the Edit button. You will be navigated to the edit affiliated entity page
- 2. Edit affiliated entity page appears, update affiliated entity details, click on the Save button



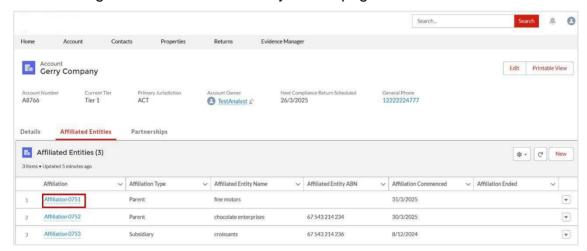


3. User is navigated to the affiliated entity page where, in this example, the affiliated entity record has been updated with an ABN.

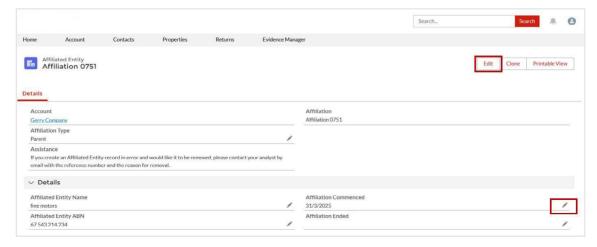


OR

4. Click on the affiliated entity hyperlink located on the affiliated entity page, user will be navigated to the affiliated entity details page

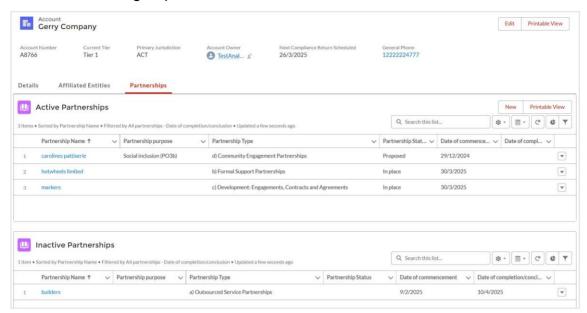


5. Click the edit button to open the Edit affiliated entity window, where you can update affiliated entity details and save your changes. Alternatively, click the pen icon to enable inline editing, make your updates, and click Save. All changes will be automatically applied.



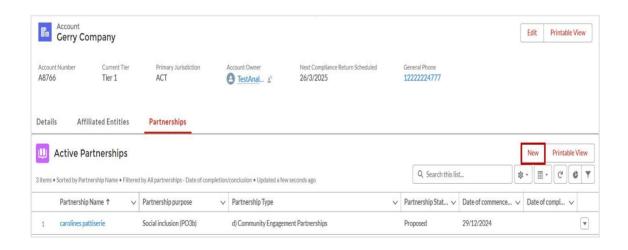
1.6 Partnerships

The Partnerships tab located on the Accounts page provides information on partnerships that have an agreement in place with the Provide. Partnerships are divided into two groups on the screen, Active and Inactive.

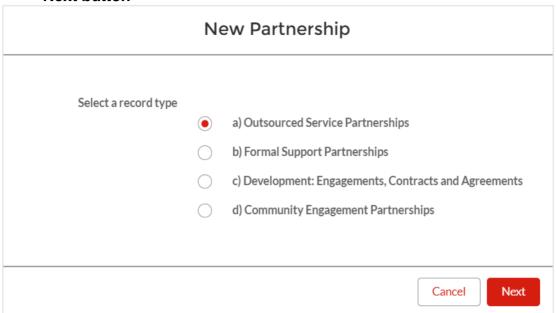


Partnership types include:

- · Outsourced service partnerships
- Formal support partnerships
- Development: Engagements, contracts and agreements
- Community engagement partnerships
- 1. Create a new partnership by clicking on the **New** button located on the top right-hand side of the page

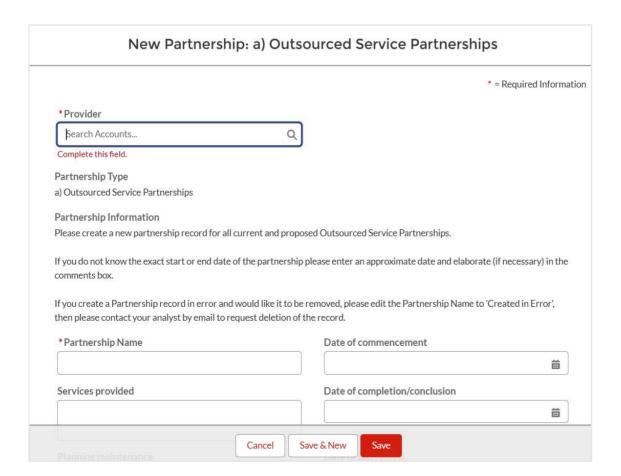


The New Partnership pop up window appears, select a partnership record type and click on the Next button

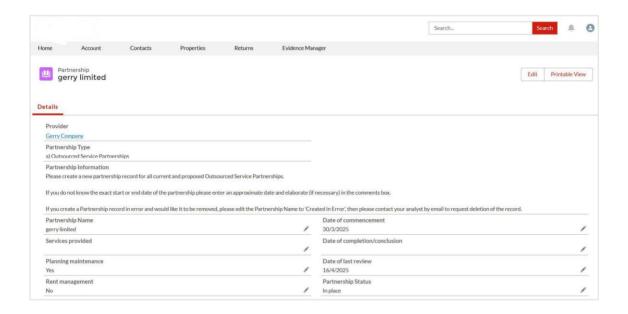


3. The New Partnership record type window appears, enter new partnership details and click on the

Save button



4. The New partnership details have been saved, and the user is navigated to the Partnership Details page. The new partnership details will now appear within the Active Contacts list on the partnership page

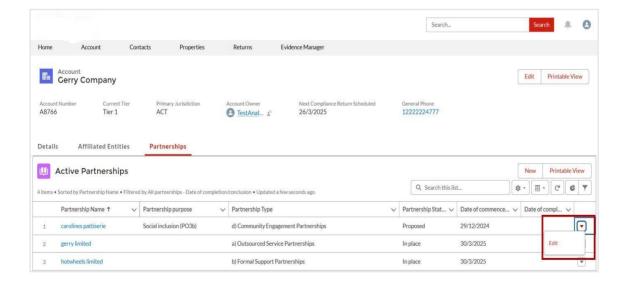




Some providers have many support partners. You only need to record those support partners whose size and significance are such that you consider them to have a material influence on your performance outcomes.

1.6.1 Edit partnership details

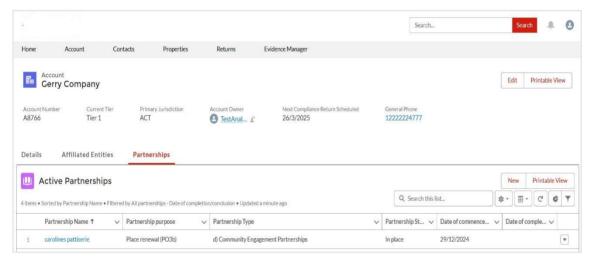
 To edit a partnership record, click on the arrow down button located on the righthand side of the partnership record, a menu will appear. Click on the **Edit** button and the user will be navigated to the edit partnership page



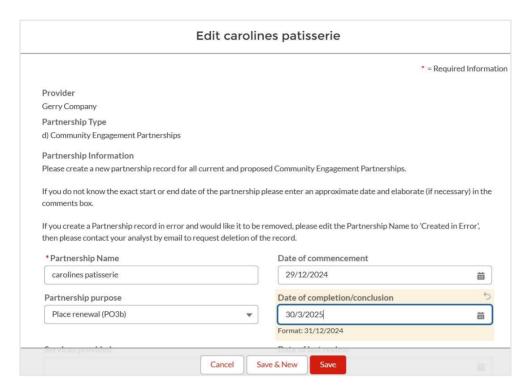
2. Edit partnership page appears, update partnership details, click on the **Save** button Edit carolines pattiserie

			* = Required Inform
Provider			
Gerry Company			
Partnership Type			
I) Community Engagement Partnerships			
Partnership Information			
Please create a new partnership record for all curre	nt and propos	ed Community Engagement Partnerships	3
f you do not know the exact start or end date of the comments box. If you create a Partnership record in error and would then please contact your analyst by email to request	d like it to be r	emoved, please edit the Partnership Nam	2000cc 2000 5005 40
f you create a Partnership record in error and would	d like it to be r	emoved, please edit the Partnership Nam	2000cc 2000 5005 40
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f you create a Partnership record in error and would hen please contact your analyst by email to request *Partnership Name carolines pattiserie	d like it to be r t deletion of th	emoved, please edit the Partnership Nam he record. Date of commencement 29/12/2024	e to 'Created in Error',

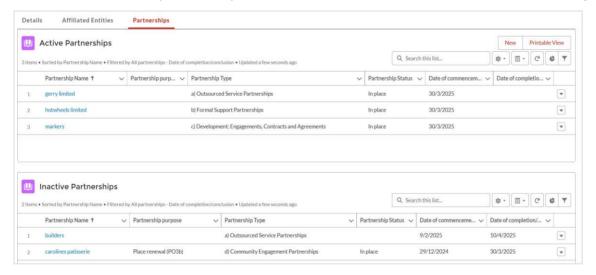
3. User is navigated to the Partnership page where the partnership details have been updated



4. Where an existing partnership has ended with the Provider you can edit the entry to show they **are no longer associated** with the organisation. "Carolines Patisserie" is an Active Partnership, edit partnership details, enter a date within the "Date of completion/conclusion" date field and click on the Save button



Carolines Patisserie partnership record is now located in the Inactive Partnerships list



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