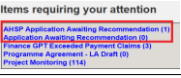

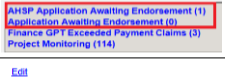



How to carry out an appraisal of an application and create a Funding Offer on HARP

Step	User	Step Description	
1	Housing Inputter	Log on to the system	
2		Select AHSP Application Awaiting Recommendation or Application Awaiting Recommendation from the 'Items requiring your attention' list	Items requiring your attention 
3		Select Edit against the relevant application - your Project Ref Number is detailed on this	Edit
4		Check that all the details of the application are correct by working your way through the tabs at the top of the screen	
5		Select +Funding Offer tab just above Main Details on the AHSP Application tab	Funding Offers
6		Select +Add New	Add New
7		Input the remaining Funding Offer Information noting the mandatory fields marked with an asterisk* Status - pre-populated within the system to read Draft Project Funding Offer Template* - pre-populated within the system Amount* - amount of funding awarded for the relevant Programme Accepted OBO (on behalf of) - leave blank, this is only to be used when individual organisation's business processes dictate Select Save	Enter numeric value Save
8		Select View Document and check that details are correct - at this stage the offer can be amended to reflect the relevant details.	View Document
9		Select File Details	File Details
10		Select Open	Open
11		The document will now be open and can be edited. Once in the finalised format, select Save As and save this into your drive.	
12		Select Browse	Browse...
13		Select the saved document and click Open	Open
14		Select Save - the edited document will now be saved to the record	Save
15		Select Back	Back
16		Select AHSP Applications	AHSP Applications
17		Select Edit against the draft application you are working on	Edit
18		If you are content then Select Submit to Awaiting Endorsement	Submit to Awaiting Endorsement
19		Enter your Awaiting endorsement Comment - if you are recommending that the funding offer be less or more than the application has requested this should be detailed here	
20		Select Confirm	Confirm
21		If you are not content with recommending the application for endorsement Select Awaiting Rework	Awaiting Rework
22		Enter your Awaiting Rework Comment - detailing reasons for passing back to applicant.	Enter text
23		Select Confirm which will now pass the application back to the applicant for rework. You should also notify the applicant by email or phone that you are sending the application back to them as they will not be automatically notified of this through the system.	Confirm

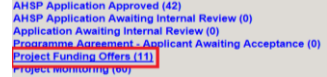
How to endorse an application

1	Housing Endorser	Log-in	
2		Select AHSP Application Awaiting Endorsement or Application Awaiting Endorsement from the 'Items requiring your attention' list	Items requiring your attention 
3		Select Edit against the Application you wish to endorse	Edit
4		Check that all the details of the application are correct by working your way through the tabs at the top of the screen including the Funding Offer tab where you can view and edit the funding offer as required. If you amend the funding offer you will need to upload the amended version.	
5		Select Submit to 'Awaiting Approval'	Submit to Awaiting Approval
6		Enter Awaiting Approval Comment	Enter text as required
7		Select Confirm	Confirm
8		You will note that the Status in the Main Details has now changed to Awaiting Approval	
9		Select Logout from top right hand of the HARP screen	
10		If you are not content to endorse the application at this time the select Rework to Awaiting Recommendation and it will be returned to the Housing Inputter	Rework to Awaiting Recommendation

How to Approve an Application or AHSP Application and Issue a Funding Offer

1	Housing Approver	Log on to the system	
2		Select AHSP Application Awaiting Approval or Application Awaiting Approval from the 'Items requiring your attention' list	Items requiring your attention 
3		Select 'Edit' against the Application	Edit
4		Check that all the details of the application are correct by working your way through the tabs at the top of the screen	
5		Select +Funding Offer	Funding Offers
6		Select Edit or View Document and check that details are correct - Edit if you wish to make any amendments at this stage the offer can be amended. If you make any changes to the document you will need to upload the amended version.	Edit View
7		Select Issue	Issue
8		A comments box will be presented for you to input any comments you have for the Applicant	
9		Select Confirm once you have input your comments or select Cancel if you do not wish to proceed. If confirmed this will send the Funding Offer through HARP to the recipient	Confirm Cancel

How to accept a Funding Offer

1	Applicant Approver	Log on to the system	
2		Select Project Funding Offers from the 'Items requiring your attention' list - you will see a list of offers requiring your attention.	
3		Select Edit against the Funding Offer you want to review	Edit
4		View Document to check it is acceptable.	View Document
5		Select Approve	Approve
6		Enter Comment	
7		Select Confirm	Confirm
8		Before logging out print a copy of the document for signature by your authorised signatory and return to SG by post	

How to update on HARP that the signed copy of the Funding Offer has been received

1	Housing Approver	Log on to the system	
2		Insert the number of the Project you previously created into the Quick Search field (at the top right hand corner of the screen)	
3		Select Edit against the Project	Edit
4		Select Funding Offers tab	Funding Offers
5		Select Edit against the Funding Offer previously created	Edit
6		Update Date Signed Copy Received with relevant date	
7		Select Save	Save
8		Select Back	Back
9		Select Project tab and you will see the Project status is now live	Project

How to update the GPT on HARP to allow payments to be paid (this will be agreed in principle when agreeing projects but for the purpose of the training packs the GPT should be put on at this stage)

1	Housing Endorser or Approver	Log on to the system	
2		Insert the number of the Project you previously created into the Quick Search field (at the top right hand corner of the screen)	
3		Select Edit against the Project	Edit
4		Select Grant Planning Target tab	Grant Planning Target
5		Update the Project Grant Planning Target, the Financial Year will default to the current one	
6		Select Save	Save
7		Select Back	Back
8		Log out	