



Registrar of  
Community Housing

# **Navigating the Community Housing Regulatory Information System (CHRIS)**

## **Guidance for Providers**

## **NSW Local Scheme**

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# Getting Started

## Purpose

This document provides guidance to community housing providers on how to use the Community Housing Regulatory Information System, known as CHRIS.

This document is one in a series of guides available on the Registrar's website that have been developed to assist community housing providers through the registration and compliance process.

## What is CHRIS?

- CHRIS is an online system that providers use to complete the application process to become registered as a community housing provider.
- Registered providers continue to have access to CHRIS so they can keep particular details up-to-date and to complete the compliance process.
- CHRIS is accessed through a secure online portal to which the provider has a unique login username and password. All information is secure.
- CHRIS will operate on any standard IT hardware and will run on Mac and PC operating systems. It does not require special software – just internet access.
- It is recommended that you use the latest version of Google Chrome, Mozilla Firefox or Apple Safari. These are freely available on the internet. Older versions, especially Microsoft Internet Explorer, are not supported and you may experience issues with display or functionality.

## Nominated Main Contact - portal access

- Providers will receive login access for the person they identify as their Nominated Main Contact.
- The Nominated Main Contact will be sent an email with instructions for logging into CHRIS along with a unique username and temporary password. The username is in the following format:

firstname.lastname@chris.provider

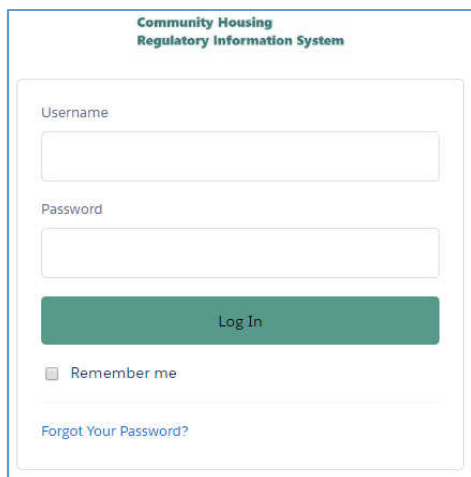
- All correspondence through CHRIS will be sent to the Nominated Main Contact person. Please contact your assigned Analyst if the Nominated Main Contact changes or is on leave for an extended period.
- When a provider is registered, the Nominated Main Contact continues to have portal access so they can keep the provider's details up-to-date.



If the Nominated Main Contact's username and password are shared with other staff within the organisation, they must not edit the same record at the same time otherwise some changes will not be saved and data will be lost.

## How to log in

- You can log into CHRIS through the Registrar's website where you will be taken to the following screen.

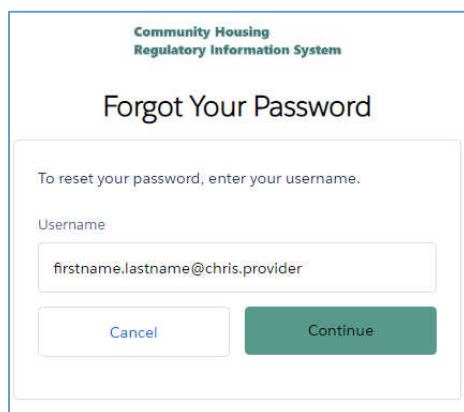


The image shows the login screen for the Community Housing Regulatory Information System (CHRIS). At the top, the title "Community Housing Regulatory Information System" is displayed. Below the title, there are two input fields: "Username" and "Password". A green "Log In" button is positioned below the password field. Underneath the button is a checkbox labeled "Remember me". At the bottom of the form, there is a link that says "Forgot Your Password?".

- Your session will be automatically terminated after 8 continuous hours of inactivity.

## Forgot your password?

- If you have 5 invalid login attempts, you will be locked out of CHRIS for 15 minutes.
- The login screen has a *Forgot Your Password?* link which can be used to set a new password. Note that the link requires you to enter your username.



The image shows the "Forgot Your Password" screen for the Community Housing Regulatory Information System (CHRIS). The title "Forgot Your Password" is centered at the top. Below the title, there is a text prompt: "To reset your password, enter your username:". Underneath this prompt is a "Username" input field. The field contains the placeholder text "firstname.lastname@chris.provider". Below the input field are two buttons: a "Cancel" button and a green "Continue" button.

- Your username is linked to your email address. You will receive an email that contains a link to reset your password. The email you receive will be from:

noreply@salesforce.com  
on behalf of Community Housing Regulatory Information System

- The email contains a temporary link to reset your password. This link is for single use only. Any future logins should be via the Registrar's website.
- When the link is selected, the Change Your Password screen will open. This is where the new password is entered. Enter and confirm your new password and select *Change Password*.
- If you do not receive the reset password email, check your spam or junk mail folders and make sure you have entered the username on the reset password screen.

# Navigating CHRIS

## Tabs

- The following screen will be displayed when you successfully log in.




- There are 3 tabs across the top of the screen which provide access to your Account, Contacts and Returns.
- The first time you click on any of the tabs, you will need to click the Go! button. This will display the records located within the tab.
- The Accounts tab is where you will find details about your organisation and links to create and manage records for any Affiliated Entities and Partnerships.
- The Contacts tab is where you can create and manage records for key people in your organisation. A record has already been created for the Nominated Main Contact.
- The Returns tab is where you will find:
  - The Eligibility & Tier Form
  - The Application for Registration
  - Current and previous Compliance Returns
  - Determination Reports

## Help text



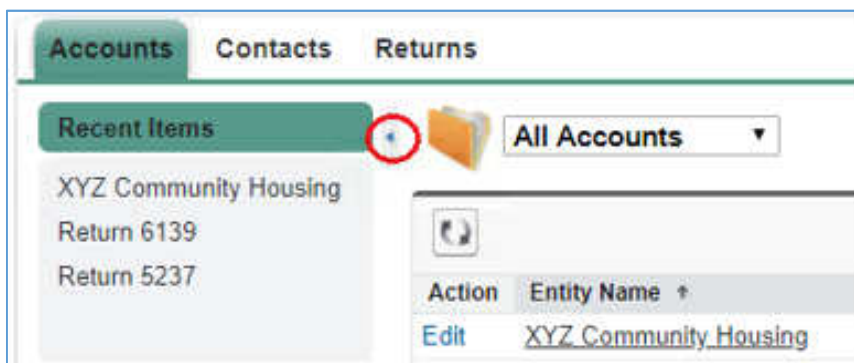
Further information and definitions are provided when you hover your cursor over the question mark icons.

Ready to submit form  ☐

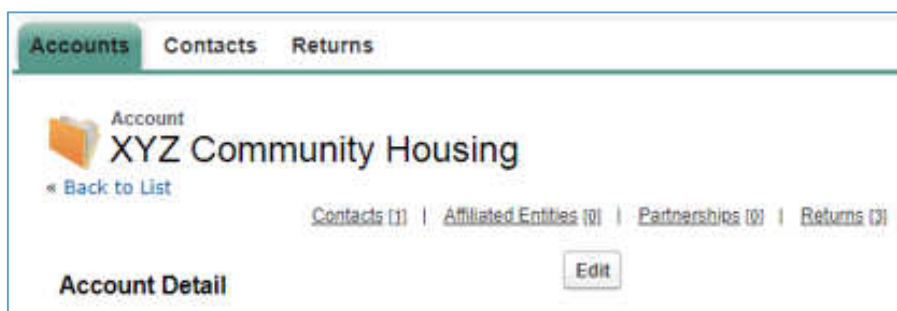
Tick this box and save before pressing the Submit for Approval button. Ticking this box will also check if all required fields have been completed, including Consent, Authorisation, and Declaration given.

## Basic navigation

- CHRIS has a sidebar which shows a list of recent items. You can open or close the sidebar by clicking on the small arrow on the left of the screen. You can navigate quickly to previously accessed records with only one mouse click.



- You can click on any item that is underlined to go directly to that record.
- When you click on your entity name, you will go to your account page where you will find links to Affiliated Entities and Partnerships as well as Contacts and Returns.



- Moving the cursor over these links will result in a pop up box where you can edit, view or create records.

Alternatively, clicking on these links takes you to the bottom of the account page where you can see all of your records. Here you can select records that you want to view or edit or you can create new records.

- Navigate around CHRIS by using the 'Back to List' link, or by clicking on items that are underlined such as Entity Name, Contact Name, Return Number.

## Avoid losing your data

- Save, save, save! The system does not auto save so you will need to frequently save your work by clicking the Save button, or in a Return, the Next button.
- Work on the current page will not be saved if you lose the internet connection, close the browser tab or navigate away from the page.
- Do not use the back button on the internet browser as that will take you back to the last completed action which can result in work being lost.



Remember - One person only should be logged on and editing a record. Do not edit the same record at the same time otherwise some changes will not be saved and data will be lost.

# Updating Information

## Editing provider (account) details

- To view and update your account details, click on your organisation's name then click the Edit button, make the changes and then click the 'Save' button.
- You can edit various entity details, main client groups, primary product or service, other income sources, other regulatory reporting bodies and address details.

- Some details like number of community housing assets and registration and compliance details cannot be changed by you and will be updated based on information submitted such as the CHAPR.
- The latest performance metrics section will show the most recent financial performance metrics and some non-performance metrics taken from your latest regulatory assessment.
- Double clicking on the pencil icon will enable you to edit an individual field without clicking the Edit button however, this only enables that particular field to be edited. Click the 'Save' button once editing is completed or before you move to another page.

## Creating and editing Contacts

- Providers are asked to create and maintain contact records for the key people in their organisation (e.g. Chair or equivalent).
- You can add as many contacts as you like however only one person must be selected as the Nominated Main Contact.
- You can edit most of the fields except for the contact name.



Contacts cannot be deleted and the contact name cannot be changed – please refer these changes to your assigned Analyst.



## Affiliated Entities

- The 'Affiliated Entities' link is located on the account page. This is where you can create and edit details about Affiliated Entities, if applicable.

**Accounts** Contacts Returns

Affiliated Entity Edit  
**New Affiliated Entity**

**Affiliated Entity Edit** Save Save & New Cancel

**Information**

Account XYZ Community Housing

Affiliation Type --None--

Assistance If you create an Affiliated Entity record in error and would like it to be removed, please contact your analyst by email with the reference number and the reason for removal.

**Details**

Affiliated Entity Name Affiliation Commenced [ 2/03/2020 ]

Affiliated Entity ABN Affiliation Ended [ 2/03/2020 ]

Attach relevant documents Attach relevant documents in accordance with the Affiliated Guidance note.

## Partnerships

- Details about certain partnerships need to be submitted as part of the Registration Application and Compliance Return. The types of arrangements are explained in more detail in the Return itself.
- The 'Partnerships' link is located on the account page.
- Click on the "New Partnership" button to create a new record, then use the drop down arrow to select the applicable option.

**Accounts** Contacts Returns

New Partnership  
**Select Partnership Record Type**

Select a record type for the new partnership.

**Select Partnership Record Type**

Record Type of new record [ a) Outsourced Service Partnerships ]

Continue Cancel

**Available Partnership Record Types**

Record Type Name	Description
a) Outsourced Service Partnerships	Relating to Performance Outcome 1, Outsourced Service Partnerships
b) Formal Support Partnerships	Relating to Performance Outcome 1, Formal Support Partnerships
c) Development: Engagements, Contracts and Agreements	Relating to Performance Outcome 2, Industry Partnership Engagements, Contracts and Agreements for Development
d) Community Engagement Partnerships	Relating to Performance Outcome 3, Community Partnerships

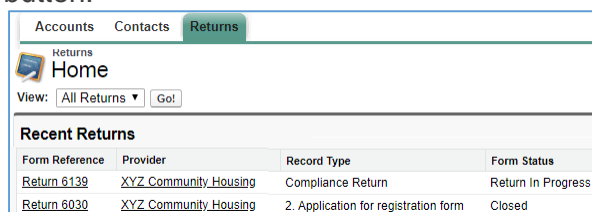
## Deleting Contacts, Affiliated Entities, Partnerships

- If a contact, Affiliated Entity or Partnership has been created in error (e.g. a duplicate record has been made), please let your assigned Analyst know so they can organise for the entry to be deleted.
- Where an existing contact has left, you can edit the entry to show the person is no longer associated with the organisation.
- Where an Affiliated Entity or Partnership is no longer in place, you can edit the record to show the end date of the arrangement.

# Completing a Return

## How to access the Return

- You can either click on the Returns tab, or go to your account page and click on the Returns link.
- The current Return and any previously completed Returns will be listed. If you don't see any records, click the Go! button.



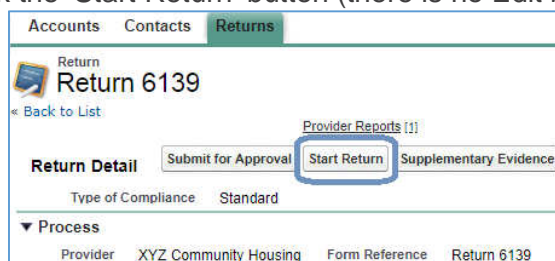
The screenshot shows the 'Returns' tab selected in the top navigation bar. Below the navigation bar, there's a 'Home' link and a 'View: All Returns' dropdown with a 'Go!' button. A table titled 'Recent Returns' lists two entries:

Form Reference	Provider	Record Type	Form Status
<u>Return 6139</u>	XYZ Community Housing	Compliance Return	Return In Progress
Return 6030	XYZ Community Housing	2. Application for registration form	Closed

- Select the applicable Return by clicking on the form reference that is underlined (e.g. Return 6139).
- The "Return Detail" page includes instructions such as how to edit and save the Return, where to seek assistance, how to attach evidence and how to submit the Return.

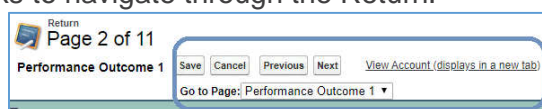
## How to edit the Return

- To edit the Return, click the 'Start Return' button (there is no Edit button).



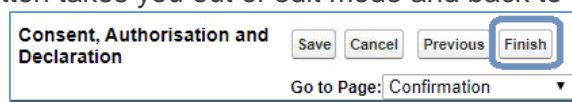
The screenshot shows the 'Return Detail' page for 'Return 6139'. The 'Start Return' button is highlighted with a blue box. Other buttons visible are 'Submit for Approval' and 'Supplementary Evidence'. The 'Type of Compliance' is set to 'Standard'. The 'Process' section shows the provider as 'XYZ Community Housing' and the form reference as 'Return 6139'.

- Use the buttons and links to navigate through the Return.



The screenshot shows the 'Return' page, 'Page 2 of 11'. It displays 'Performance Outcome 1' and navigation buttons: 'Save', 'Cancel', 'Previous', 'Next', and 'View Account (displays in a new tab)'. A 'Go to Page:' dropdown menu is set to 'Performance Outcome 1'.

- The 'Previous' and 'Next' buttons will automatically save data on the current page and take you to the previous or next page.
- If at any point you wish to stop completing the Return, pressing 'Save' then 'Cancel' will save data on the current page and take you to the Return Detail page.
- You can complete any of the pages in any order. The "Go to Page" drop down menu allows you to choose a particular page.
- Clicking the 'Finish' button takes you out of edit mode and back to the Return Detail page.



The screenshot shows the 'Consent, Authorisation and Declaration' page. It features 'Save', 'Cancel', 'Previous', and 'Finish' buttons. The 'Go to Page:' dropdown menu is set to 'Confirmation'.

## Introduction Page

- This page provides a brief summary on how to fill out and complete the Return. It is important that you read this page before moving to another page.

## Core Documents

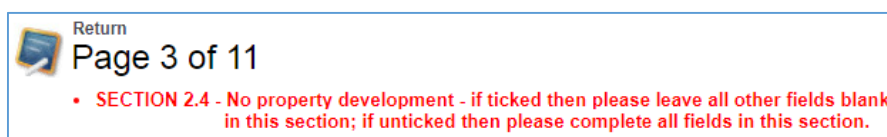
- A checklist is provided of the documents to be attached depending on the type of Return that is being completed. You can attach the core documents at this point or as you complete the relevant Performance Outcome pages.
- The Financial Performance Report (FRP) referred to in the core documents section is attached to the email invitation to commence an assessment.
- Providers are also reminded to check and update their contacts and account page details.

## Community Housing Asset Performance Report (CHAPR)

- Information regarding the provider's portfolio is entered in the Community Housing Asset Performance Report (CHAPR). If the provider does not currently own or manage properties enter zero (0).
- Any update on your portfolio or development plans must be reported on this page. It is important that the data reported here is verifiable.
- Once this page has been completed, tick the 'CHAPR Completed' checkbox at the end of the screen.

## Performance Outcomes

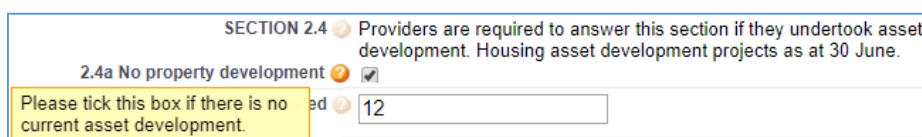
- Each Performance Outcome has its own page, which can be completed in any order.
- Performance Outcome Metrics are automatically calculated based on the figures you enter. The metrics will be displayed after saving the page.
- Each page has a checkbox at the end which must be ticked before being able to submit the Return. Error messages occur for incomplete/incorrect data. To remove the error message, untick the box. If you have not completed a page or are planning to add more data later, leave the box unticked as this will prevent error messages.



Return  
Page 3 of 11

- SECTION 2.4 - No property development - if ticked then please leave all other fields blank in this section; if unticked then please complete all fields in this section.

- Some sections have a checkbox that can be ticked to indicate that section does not apply. For example when "2.4a No property development" is ticked, the rest of that section must be left blank, otherwise an error message will occur. Explanations are included in the help text.



SECTION 2.4 Providers are required to answer this section if they undertook asset development. Housing asset development projects as at 30 June.

2.4a No property development ☒

Please tick this box if there is no current asset development.

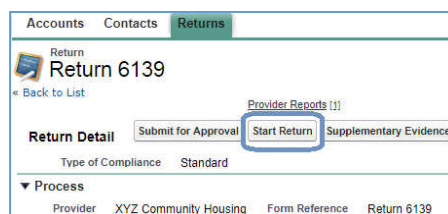
# Attaching Evidence

## Evidence previously submitted

- You can view the evidence submitted as part of a previously completed Registration or Compliance assessment by opening the relevant Return.
- There is no need to resubmit evidence that remains identical but if the provider does do this they should ensure they clearly specify where and what this evidence is on their new Return.

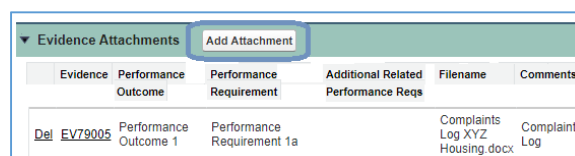
## How to add evidence attachments

1. Navigate to the applicable Return.
2. Click the Start Return button.



The screenshot shows the 'Return 6139' page. At the top, there are tabs for 'Accounts', 'Contacts', and 'Returns'. Below the tabs, the page title is 'Return 6139' with a 'Back to List' link. Under 'Return Detail', there are buttons for 'Submit for Approval', 'Start Return' (highlighted with a red box), and 'Supplementary Evidence'. Below this, it shows 'Type of Compliance: Standard'. At the bottom, there is a 'Process' section with 'Provider: XYZ Community Housing', 'Form Reference', and 'Return 6139'.

3. Navigate to a page that has the Evidence Attachments section, located at the bottom of the screen.
4. Click the Add Attachment button.



The screenshot shows the 'Evidence Attachments' section. At the top, there is a tab for 'Evidence Attachments' and a button for 'Add Attachment' (highlighted with a red box). Below this is a table with columns: 'Evidence', 'Performance Outcome', 'Performance Requirement', 'Additional Related Performance Reqs', 'Filename', and 'Comments'.

Evidence	Performance Outcome	Performance Requirement	Additional Related Performance Reqs	Filename	Comments
Del EV79005	Performance Outcome 1	Performance Requirement 1a		Complaints Log XYZ Housing.docx	Complaints Log

5. The Evidence Attachment section opens to edit mode.

For each evidence attachment:

- Select the relevant Performance Outcome and Performance Requirement;
- In the comments section, include a clear description of the attachment – this will help the Analyst when assessing the Return and it will also help you to ensure all necessary evidence has been attached before submitting the Return.
- Click the Choose File button and select the file you wish to attach from your computer.



You can upload three files in this way before clicking the Attach button.

6. Click the Attach button when you are ready to save the evidence attachment(s). This will take you back to the Return page where you can continue editing or upload further evidence.

## How to edit or delete attached evidence

Evidence you have successfully attached to the Return will be visible in the Evidence Attachments section at the end of each page.

- Click Del to entirely delete the evidence attachment if needed.

Evidence Attachments <span>Add Attachment</span>			
Evidence	Performance Outcome	Performance Requirement	Additional Related Performance Reqs
<a href="#">Del</a> <a href="#">EV79005</a>	Performance Outcome 1	Performance Requirement 1a	

- You can edit the evidence record by clicking the Evidence number. Additional performance requirements can be selected if the evidence attachment is being submitted for multiple performance requirements.

### Edit Evidence Attachment

**Evidence Attachment**
OK
Cancel

**Edit Attachment Details**

Performance Outcome: Performance Outcome 1 ▼  
Performance Requirement: Performance Requirement 1a ▼  
Additional Related Performance Reqs:

**Available**

- Performance Requirement 1a
- Performance Requirement 1b
- Performance Requirement 1c
- Performance Requirement 1d
- Performance Requirement 1e
- Performance Requirement 1f

**Chosen**

Comments: Complaints Log

## Evidence Attachment Section – Edit Mode

Accounts
Contacts
Returns

### Create Evidence Attachment

1) Please select performance outcome and performance requirement and enter comments relating to the attachment. Please indicate in the comments, if the attachment is relating to more than 1 performance outcome or performance requirement.  
2) Use the Choose File button to select the Attachment File  
3) Use the Attach button to save  
Note:  
i. If performance outcome and requirement are not completed, an error will occur and you will need to reselect the file for attachment. If more than 1 file was attached, all files will need to be reselected.  
ii. You can attach up to 3 files with a limit of 10MB per file.

**Evidence Attachment**
Attach
Cancel

**Enter Attachment Details and Select File**

Performance Outcome	Performance Outcome 1 ▼	Performance Requirement	--None-- ▼	Comments	<input type="text"/>	<span>Choose file</span> No file chosen
Performance Outcome	Performance Outcome 1 ▼	Performance Requirement	--None-- ▼	Comments	<input type="text"/>	<span>Choose file</span> No file chosen
Performance Outcome	Performance Outcome 1 ▼	Performance Requirement	--None-- ▼	Comments	<input type="text"/>	<span>Choose file</span> No file chosen

# Submitting the Return

## Step 1 – Finalise the Return

Check that all data fields have been completed and all required evidence has been attached.

1. Ensure all pages have the checkbox at the end of the page ticked which indicates the page has been completed. Check there are no error messages on any pages.

Checkbox examples:

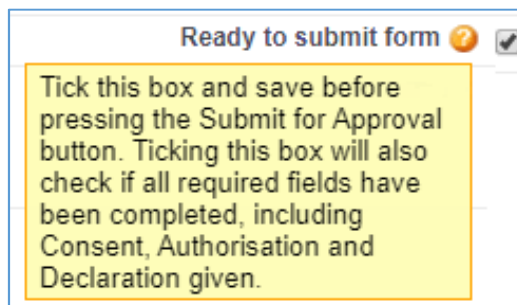
CHAPR completed

Performance Outcome 1 completed

2. Complete all questions on the Confirmation page.

This is the final page that must be completed before the Return can be submitted to the Registrar – please see the instructions on the page.

3. Tick the checkbox “Ready to submit form” (or Ready to submit ETF).



Ready to submit form ☒

Tick this box and save before pressing the Submit for Approval button. Ticking this box will also check if all required fields have been completed, including Consent, Authorisation and Declaration given.

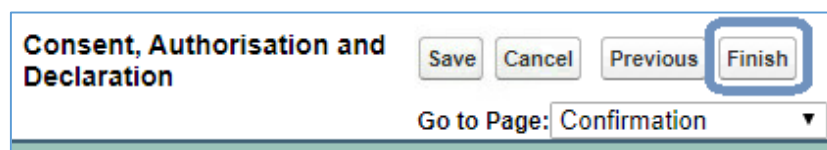


Error messages:

If you receive any error messages when you tick the Ready to submit checkbox, untick the box and review the Return to locate and address all error messages.

4. Click the Finish button.

This will save the Return and take you back to the Return Detail page. The Return may still be edited at this point by clicking Start Return.



**Consent, Authorisation and Declaration**

Save Cancel Previous **Finish**

Go to Page: Confirmation ▼

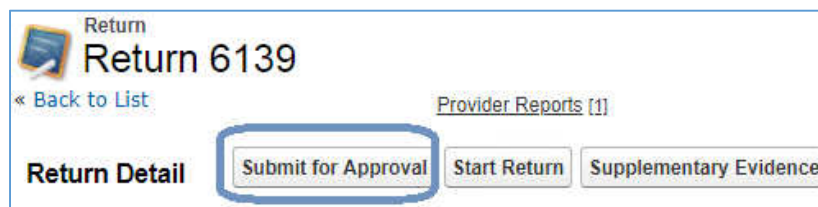


A copy of the Return can be printed at any time from the Return Detail page using the Printable View link.

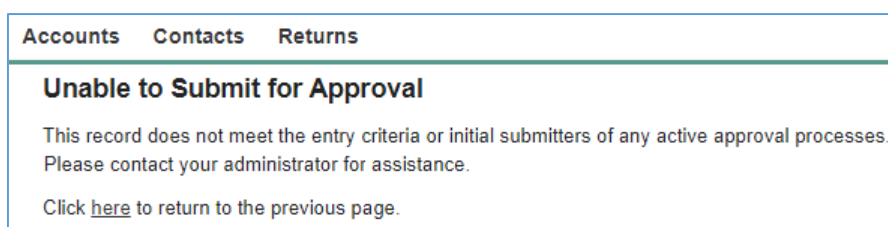
## Step 2 – Submit the Return

When you are ready to send the Return to the Registrar's office.

1. Go to the Return Detail page and click the Submit for Approval button.

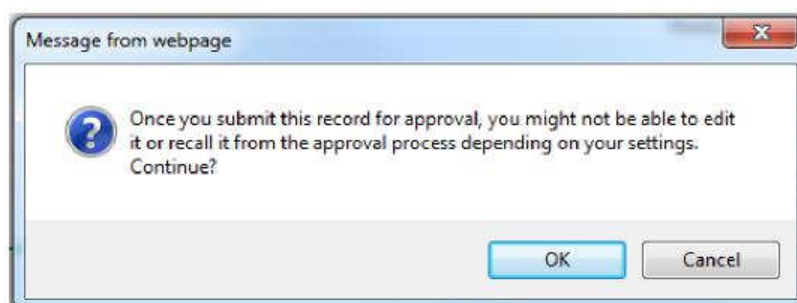


Error message:



If you receive an error message “Unable to submit for Approval” when you click the Submit for Approval button, it is most likely that the Ready to submit form (or Ready to submit ETF) checkbox has not been ticked. You can see the checkbox at the top of the Return Detail page. If necessary, repeat Step 1 – Finalise the Return.

2. If there are no error messages, the following window will pop up. Click OK if you wish to continue to lodge the Return.



## Confirmation

- You will receive an automatic email notification confirming the Return has been submitted. Your Analyst will also receive a notification.
- The Return will be locked from editing.



**Start Return**

- If the Return needs to be modified, please contact your Analyst so they can reopen the Return.

# After the Return is Submitted

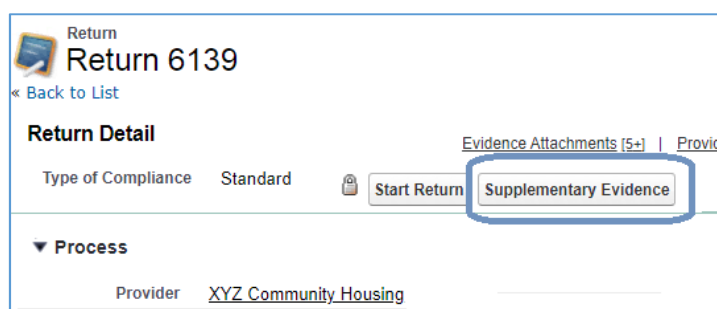
## Initial check by Analyst

- Your assigned Analyst will carry out an initial check to see whether all supporting evidence has been attached – essentially the core documents – and whether the Return appears to have been fully completed.
- If the Return is incomplete, the Analyst will send an email detailing the required information and they will unlock the Return so you can make any necessary changes. Follow the same process used to: complete the Return; attach evidence if applicable; and submit the Return.

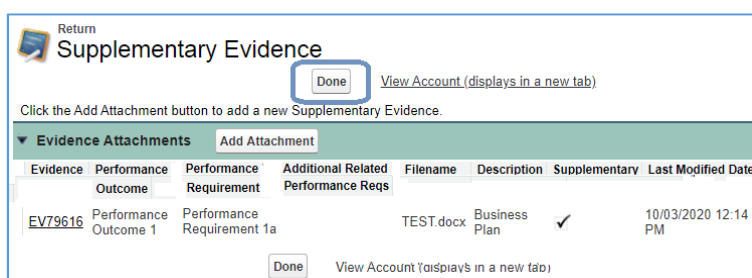
## Supplementary Evidence

During the assessment process, the Analyst may identify that additional information/evidence is required. The Analyst will send an email asking you to attach the additional information as Supplementary Evidence. The Return will remain locked from editing. To attach supplementary evidence:

1. Navigate to the applicable Return.
2. Click the Supplementary Evidence button.



3. Refer to “Attaching Evidence” section, steps 4 and 5.
4. Click the Done button when you are ready to save the evidence attachment(s). This takes you to the Return Detail page where you can click the Supplementary Evidence button to continue uploading further evidence.

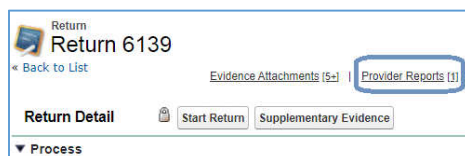


- Each attachment will be automatically ticked as supplementary evidence.
- Supplementary evidence can be edited/deleted using the process outlined in the Attaching Evidence section.

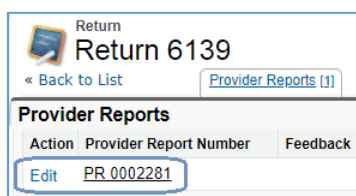


## Draft Determination Report – Provider Comment

- When the assessment has been completed, you will be sent an email notifying the draft determination report is available for comment.
  - You will have 14 days from the date the email was sent to provide comment on the draft determination.
  - To provide comment, you need to log into CHRIS and use the Provider Reports section.
1. Log into CHRIS and navigate to the applicable Return.
  2. Click, or hover over, the Provider Reports link.



3. Click Edit or click the Provider Report Number (e.g. PR 0002281) and then click the Edit button.



4. Enter comments in the Feedback box.
5. Tick the checkbox Feedback Completed?
6. Click the Save button.
7. Use the Notes and Attachments link on the Provider Reports page to attach additional evidence if applicable.
8. Click the Submit for Approval button when you are ready to send your feedback to the Analyst.

- You will receive an automatic email notification confirming your feedback has been submitted. Your Analyst will also receive a notification.
- The Provider Reports page will be locked from editing. Please contact your Analyst if you need further access.

## Final Determination Report

The release of the Final Determination Report signifies that the assessment process has been completed. You will receive an email from your Analyst advising the final determination report is available in the Provider Reports section in CHRIS.