

PYRAMID



Quarterly Pyramid Newsletter

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Introducing Pyramid G2

As of Monday the 16th of October 2023, BHT Sussex has moved away from Pyramid G1 to Pyramid G2, from a 25 year old software to a web app, we will be going over what has changed and how to work your way around the new system.

What's Changed

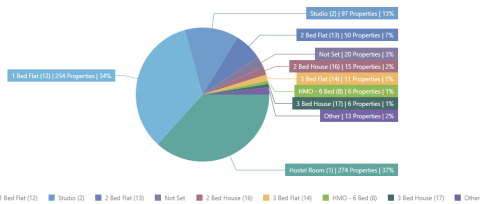
Aside from the new look, many features have new functionality, for example:

- Tenant keys are now automatically generated upon creation.
- Moving a tenant now automatically applies charges to the tenant/void.
- Properties and tenants may now be searched by name through the rent ledger.
- The new dashboard feature shows breakdowns of Accommodation Types, Void Analysis & rent charges by Housing Group.

For a closer look into the functionality of Pyramid G2, there is an [overview video](#) created by Omniledger on the homepage.

Accommodation Types

Units:	060 Residential / 60 Void / 104 Communal / 236 Obsolete
Accommodation:	274 x Hostel Room (1)
	254 x 1 Bed Flat (12)
	97 x Studio (2)
	50 x 2 Bed Flat (13)
	20 x Not Set
	15 x 2 Bed House (16)
	11 x 3 Bed Flat (14)
	6 x HMCO - 6 Bed (8)
	6 x 3 Bed House (17)
	5 x Bedset (3)



Breakdown of Accommodation Types within BHT Sussex

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Tenant Administration

Creating a Tenant

To create a tenant, you must first navigate to the rent ledger, this can be found at the top of the screen, underneath the Housing & Support tab, everything covered in this issue will be under this menu, excluding reports.

From the rent ledger, there is an Actions tab, from here, hover over Create and click on Create Tenant to the left of the menu, this will bring up a menu with fields to be filled with contact information, once complete, clicking Submit will create the tenant and generate a tenant key.

Create Tenant
 Create Tenant contact information - name, date of birth, phone numbers and email

Booking Property:	Booking Property	
Title:	Select...	0/4
Forename:	Forename	0/15
Initials:	Initials	0/6
Surname:	Surname	0/20
Date of Birth:	Date of Birth	
Home Phone:	Home Phone	0/20
Work Phone:	Work Phone	0/20
Mobile Phone:	Mobile Phone	0/20
Email:		0/50
National Insurance:	National Insurance	0/10

Cancel

The new tenant creation menu

Cloning a Tenant

While the location has changed, cloning a tenant remains very simple, all that needs to be done is going to Actions under the tenant’s account and selecting the Clone Tenant option, from there it will prefill the tenant to be cloned and generate a tenant key, they can then immediately be moved into a property.

Moving a Tenant

Once the tenant has been successfully created, they will be ready to be moved into a new property, to do this, change the lookup tab from Tenants to Properties and search for the property the tenant will be moving into under the Address field.

From there, the fields are very similar to the fields in G1, the only difference being the Automatic Prorata option, which should always say yes.

The process for moving a tenant out follows the same format, simply find the property the tenant currently resides in and move empty in.



Assignments

Creating and Adjusting an Assignment

Once a tenant has been moved in to a property, they will immediately be charged rent for the days they have been in the property, up until the end of the week, this rent is all automatically allocated to tenant contribution, which is very rarely the case within BHT.

To change this, the assignment must be adjusted to reflect how much of the rent will be covered by third party sources, such as Housing Benefit or Adult Social Care, this can be done by going to details under the tenant’s account and clicking the pen next to the Rent Funding & Assignments menu.

In most cases, only one assignment will be in use at one time, this means only Assignment 1 should be edited, clicking on the drop down underneath Assignment 1 brings up options for each third party, once the correct one has been selected, change the Assignment 1 Paid Via field to Direct and the value to however much the third party should be paying per week.

While Universal Credit is an option, please do not use this as UC is now worked out as part of Tenant Contribution.

Rent Funding & Assignments

Assignments	Value	Balance
Tenant	£91.09	£387.28 Arr
Housing Bene	£11.28	£33.84 Arr
	£0.00	£0.00
	£0.00	£0.00
	£0.00	£0.00
	£0.00	£0.00
Total Charges	£102.37	£421.12 Arr

Example Assignment menu

Backdating an Assignment

Once the assignments are all correct, previous rental charges will need adjusting to make sure they are also allocated at the correct rate, third parties may also backdate their claims which will need reflecting.

To do this, click Actions in the tenant’s accounts and go to Assignment Adjustment under posting, from there, select the Assignment type and input the amount the third party will be paying per week in the New Value field, if you are entering this for a new tenant, change the start date to the date they moved in and the end date to the end of the current week (Sunday).

For backdated claims, you must instead change the New Value to the Weekly amount the third party has agreed to pay, if this change to assignment is a fixed amount of time, input the dates given as start and end dates, if the change is indefinite, change the move out date to the end if the current week.

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Reports & Other Features

Generating a Report

While the reports menu has moved, the reports themselves have stayed the same, all reports are now accessed through the Reports tab at the top of the screen, from there, click Housing & Support and each report will be listed with a description.

The most commonly generated Assignment Arrears report is found on this menu and can still be directly imported into the Arrears Monitoring Report, the parameters for its generation have not changed so the process for updating the report is still the same.

Tenant Notes

Adding notes to tenant accounts is now done by clicking the Ten Hist button underneath the Tenant Summary, to view previous notes, go to the Tenant History tab and click on the date header to sort the notes by newest to oldest.

Column Filtering

A new feature of Pyramid G2 is the ability to customise the columns when viewing menus, however you choose to arrange and sort these columns is remembered and will be in place the next time you view this menu.

Using the Rent Ledger as an example, you could choose to have it arranged from right to left as Tenant Key, Tenant Name, Property Key, Move In Date, Address & Balance, so every time you check a tenant, a snapshot of important information will be visible.

A column can be added by clicking the filing cabinet symbol to the left of the search box to open the Column Chooser and dragging boxes from the list into the existing columns, similarly, removing a column can be done by dragging an existing column into the Column Chooser, columns can then be moved simply by dragging them to the desired location.



That's it for this issue, please let us know at rentofficers@bht.org.uk if there is anything you would like to see covered next time.