

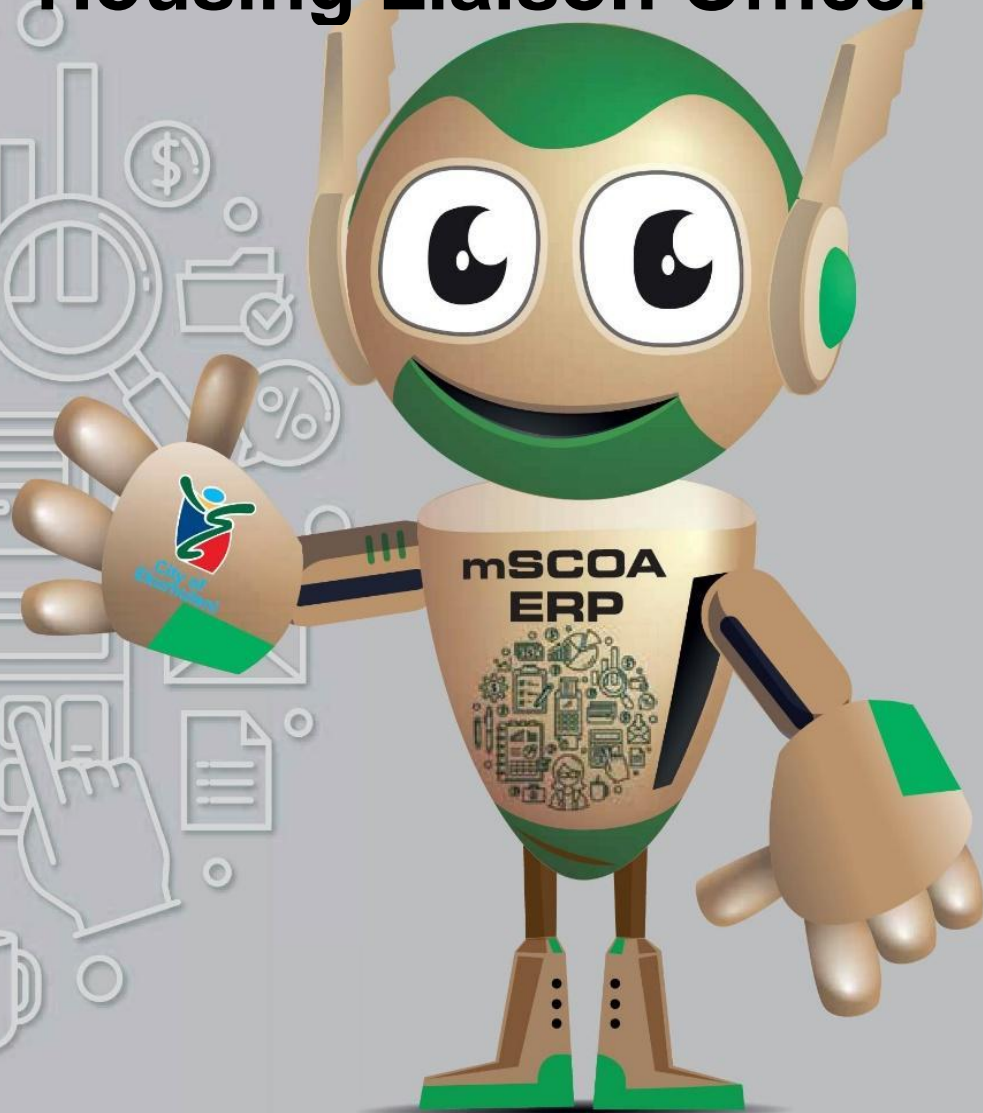
ERP Functional USER MANUAL

Training Manual

Property Lease Management

Human Settlement

Housing Liaison Officer



OUR JOURNEY
TO A SMART DIGITAL CITY



City of
Ekurhuleni

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1 OVERVIEW

• 1.1 INTRODUCTION

City of Ekurhuleni (COE) has a mandate to promote the Smart City concept for transformation, growth, development and ensure that all Ekurhuleni's citizens derive sustainable benefit from technology development. The Information and Communication Technology (ICT) department has a responsibility to ensure that ICT goals are aligned to and support the City's mission and strategic objectives of becoming a Smart, Creative and Developmental City, and that optimum business value is realized from ICT related investment services and assets. Information and Communication Technology (ICT) is one of the key strategic enabling department within the City. It uses and leverage on the implementation of technology to enable the City to deliver services effectively and efficiently.

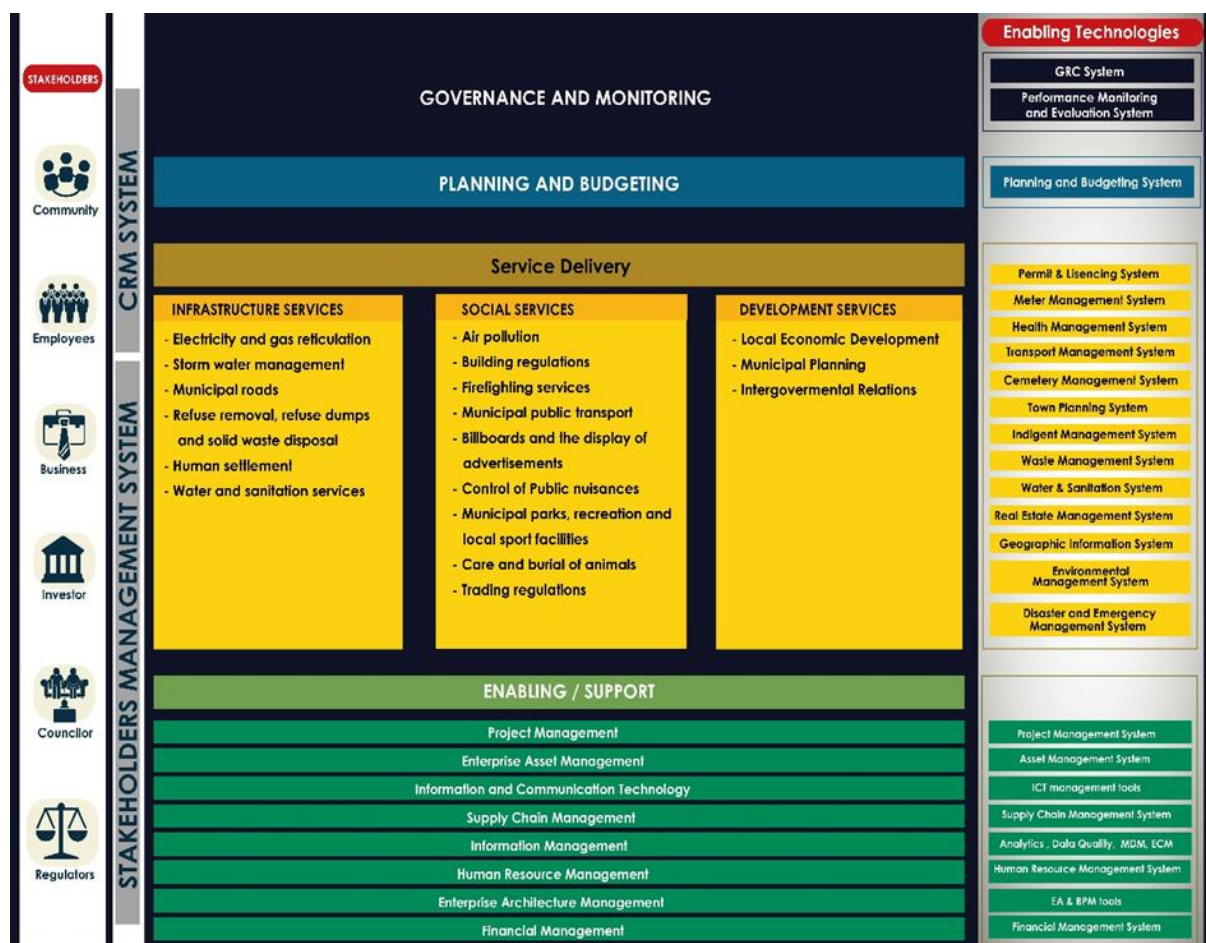


Figure 1: City Model

The municipal reference model has been set as a standard capability reference for all the departments. It illustrates the core, enabling/ support functions and its relevant systems, and the different stakeholders involved.

Governance and Monitoring is an overarching capability providing an oversight to all capabilities in the municipality.

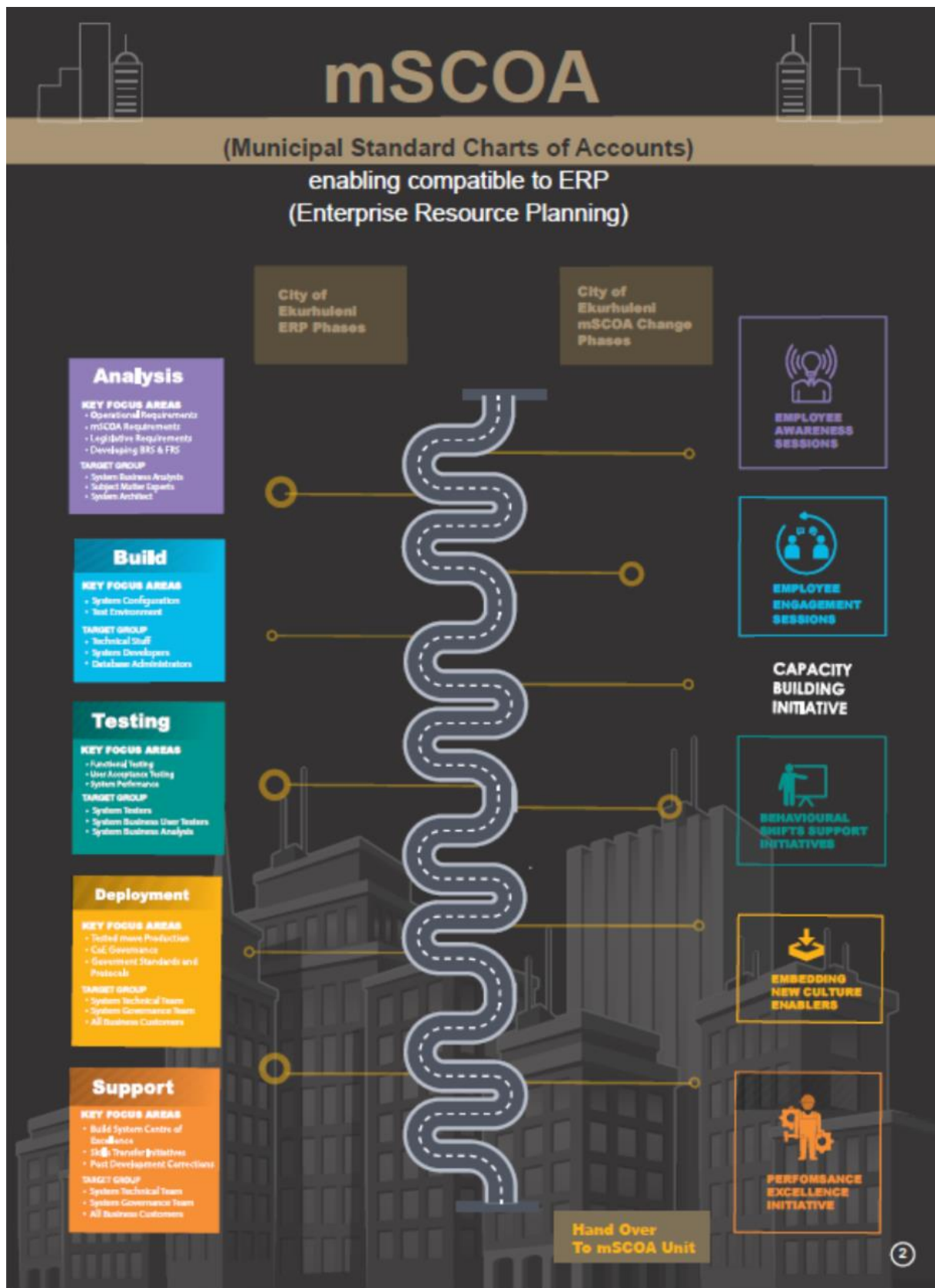
Strategy capability is responsible for all planning and budget related capability for the CoE municipality. Evaluating existing business unit strategy based on the company's strategy and eliminate unwanted/unnecessary resources/elements and re-consider necessary resources to meet the overall company's strategy.

Core capability is all the municipality business processes mandated by the municipal act, to provide all constitutionally mandated services as prescribed by the Section 4 B and Schedule 5 Part B of the constitution.

Enabling/Supporting capability is all the transversal function within the municipality, that provide support to core process with a view to deliver the municipal mandated services.

Enabling Technology is all the systems/ applications used by the municipality to support internal business process, each capability layer will comprise associated applications.

• 1.2 mSCOA ERP



2 GENERAL SYSTEM INFORMATION

Property Letting is one of the revenue generating streams within CoE. Human Settlement Department (HSD) - Community Services and Relationship Management is responsible for managing leasing of city owned properties reserved for the elderly (old age homes, cottages, and flats) and receiving pension or grant, as well as family units for those who have other sources of income. The division is also responsible for men and women hostels which are under the care of the city. HSD does not have any system to support their leasing function. Most of the processes are still managed manually using spreadsheets which has negative effect on operations and the reporting thereof. There is a need to implement a fully integrated system, that will support the Property Lease Management capability end to end for HSD.

3 LEARNING REQUIREMENTS

It is expected that learners have the following pre-requisites:

- Computer literacy
- A good understanding of the Property Lease Management (PLM), Human Settlement Department system.

This User Guide is intended for the following audience:

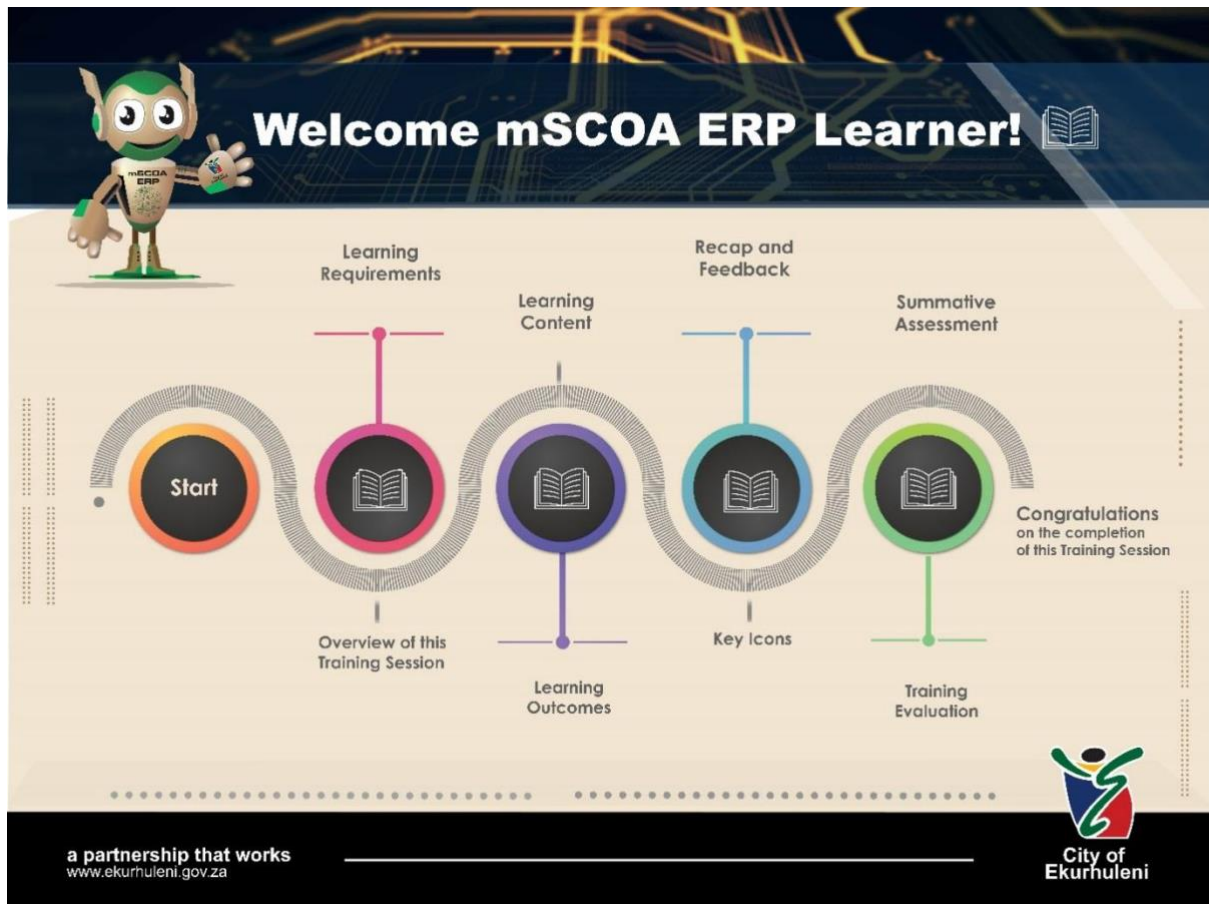
- Housing Liaison Officer

4 LEARNING EXPECTATIONS

Understand System Concepts:

- System Login
- Submit Applications
- Document Uploads
- Signing Lease Agreement
- Renewing a Lease Agreement
- Conducting Inspections
- Terminating a Lease Agreement

5 LEARNING JOURNEY



6 KEY AREAS OF LEARNING





1	LOGIN TO PLM
2	SUBMITTING A LEASE APPLICATION FORM
3	ADDING AN OCCUPANT TO THE LEASE
4	TRANSFERRING A LEASE
5	RECOMMENDING FOR LEASE RENEWAL
6	ACCEPTING A LEASE RENEWAL
7	RENEW LEASE
8	GENERATING A LEASE AGREEMENT
9	SIGNING AN AGREEMENT OF LEASE
10	FINALIZE LEASE AGREEMENT
11	TENANT SERVING NOTICE
12	NOTICED AGREEMENTS
13	CONDUCT UNIT INSPECTION
14	CONDUCT UNIT VACATED INSPECTION
15	AGREEMENT OF LEASE TERMINATION
16	SENDING OUT A COMMUNICATION
17	LOG OFF

7 LEARNING OUTCOMES

At the end of this module, you will be able to:

- Navigate the Property Lease Management (PLM) Human Settlement system.
- Learn how to access information in the system and actioning applications.

8 KEY ICONS WITHIN THE LEARNING MATERIAL

	Note
	Activity
	Information
	Learning Outcomes

9 LOGIN TO PLM



After completing this sub-section, you will be able to successfully login to Property Lease Management system.



The process begins when you as the Revenue Manager opens the Google chrome web browser and inputs the following link in the browser search pane: <https://propertylease.ekurhuleni.gov.za> , where you will be navigated to the City of Ekurhuleni Property Lease Management landing page.



User must be able to sign in, to work on the Property Lease Management system.

Navigate



On this screen:

- Click **Profile** dropdown arrow on the navigation panel.
- Click on the **Sign In** item.
- You will be navigated to the **Sign In** page.

Screen



Coe PLM Landing Page - Profile

Navigate



On this screen:

- Enter your active directory **Username** and **Password**
- Click on the **Sign In** button

Screen

Sign In Page

You have now successfully completed this sub-section

10 SUBMITTING A LEASE APPLICATION FORM



After completing this sub-section, you will be able to successfully submit a property lease application on the PLM system.



You have the functionality to capture and submit a lease application on behalf of a walk-in customer.

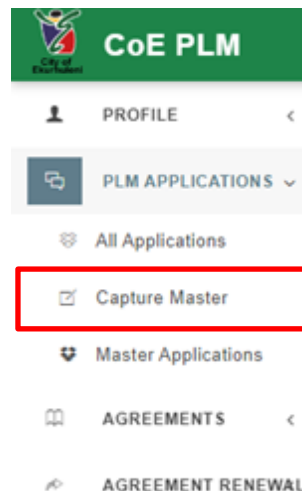
Navigate



On this screen:

- Click **PLM Applications** dropdown on the navigation panel.
- Click **Capture Master** to commence with capturing of the Lease Agreement.

Screen



Navigation Panel



- Under the **Tenant Information** tab, there will be multiple sub-sections which need to be capture, such as:
 - Tenants Details
 - Contact Details
 - Income Details
 - Current Address
- When **SASSA Grant** option is selected as the **Income Source**, the **SASSA Number** field will be unhidden for you to capture.

Navigate

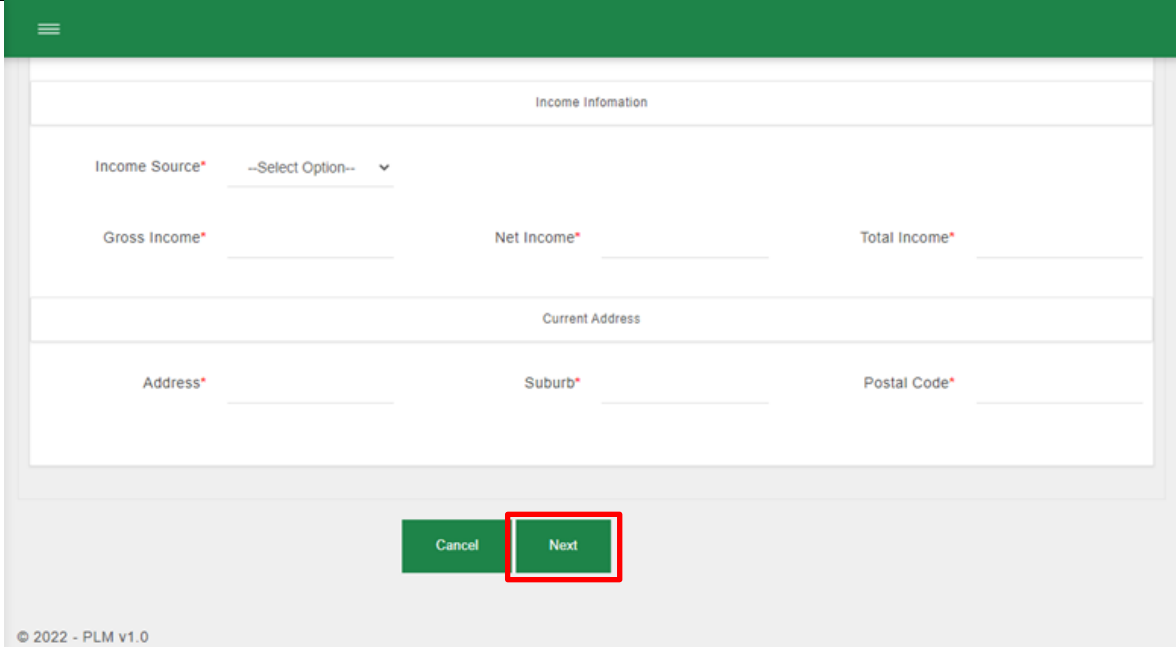




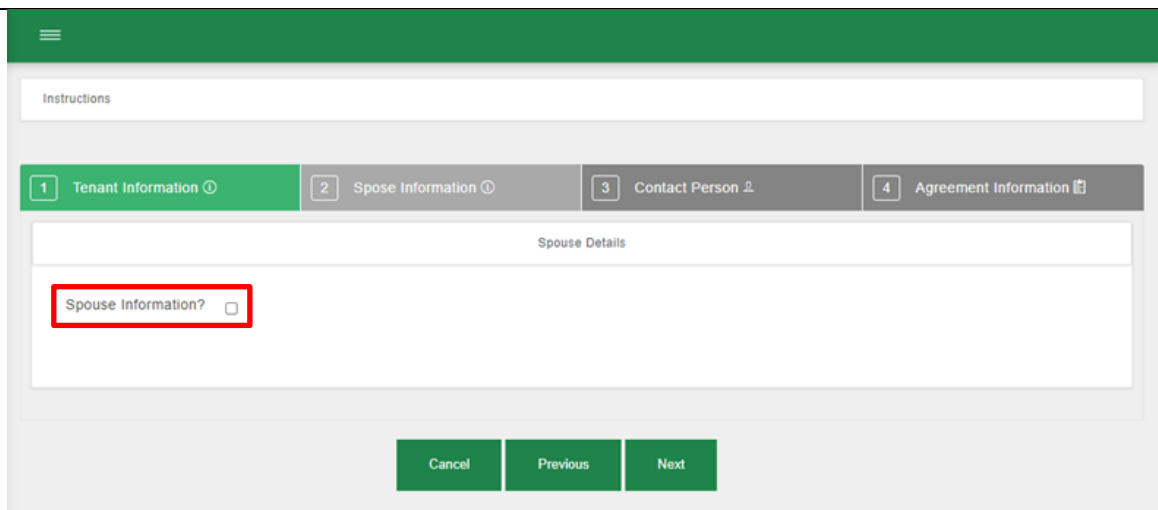
On this screen:

- The **Tenant Type** will automatically be **Individual Type**
- Capture the First Name, Surname and ID Number
- The **Date of Birth** will pre-populate once you have entered the **ID number**.
- Input the Mobile Number
- Input the Email Address
- Select an **Income Source** option from the dropdown list:
 - Pension
 - Salary
 - SASSA Grant
- Capture the Gross Income and Nett Income
- The **Total Income** will pre-populate.
- Capture the Address, Suburb and Postal Code
- Click **Next** to proceed to the **Spouse Information** tab.

Screen

Tenant Information

	<div data-bbox="256 152 1437 797">  </div> <p data-bbox="715 801 981 835" style="text-align: center;">Tenant Information</p>
	<ul style="list-style-type: none"> • The Spouse Information section is optional to complete. • Once selected, additional fields will be unhidden. • To skip this section, click Next.
Navigate	
	<p>On this screen:</p> <ul style="list-style-type: none"> • Click Profile dropdown arrow on the navigation panel. • Click on the Sign In item. • Capture First Name • Capture Last Name • Select Gender • Select Title • Select Nationality and additional fields will be unhidden. • Input your ID Number • Tick check box Nominate for Take-Over? if the applicant wants to transfer the lease over to the spouse at a later stage.
Screen	



Instructions

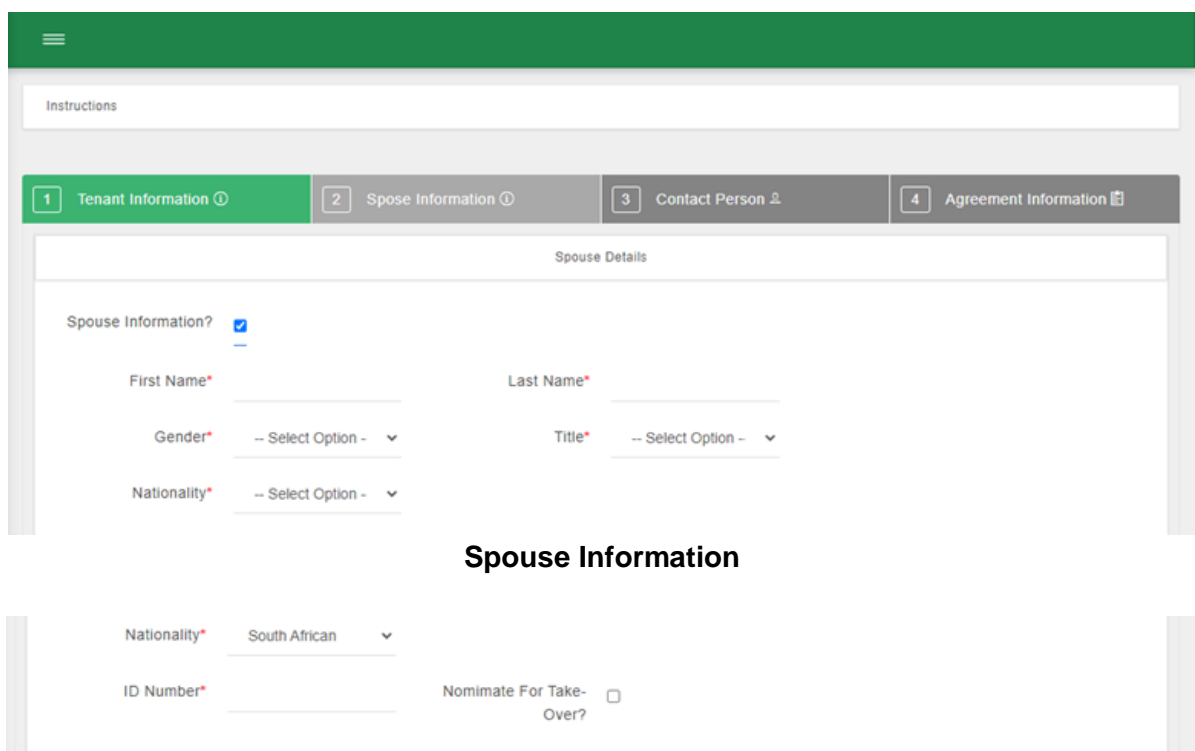
1 Tenant Information ⓘ 2 Spouse Information ⓘ 3 Contact Person ⓘ 4 Agreement Information ⓘ

Spouse Details

Spouse Information? ☐

Cancel Previous Next

Spouse Information



Instructions

1 Tenant Information ⓘ 2 Spouse Information ⓘ 3 Contact Person ⓘ 4 Agreement Information ⓘ

Spouse Details

Spouse Information? ☒

First Name* Last Name*

Gender* -- Select Option - v Title* -- Select Option - v

Nationality* -- Select Option - v

Nationality* South African v

ID Number* Nominate For Take-Over? ☐

Spouse Information

Addition Fields - Spouse Information



- Click **Profile** dropdown arrow on the navigation panel.
- Click on the **Sign In** item.
- When **SASSA Grant** option is selected as the **Income Source**, the **SASSA Number** field will be unhidden for you to capture.
- The **Total Income** from the applicant will reflect and will be automatically calculated with the spouse's income.

Navigate


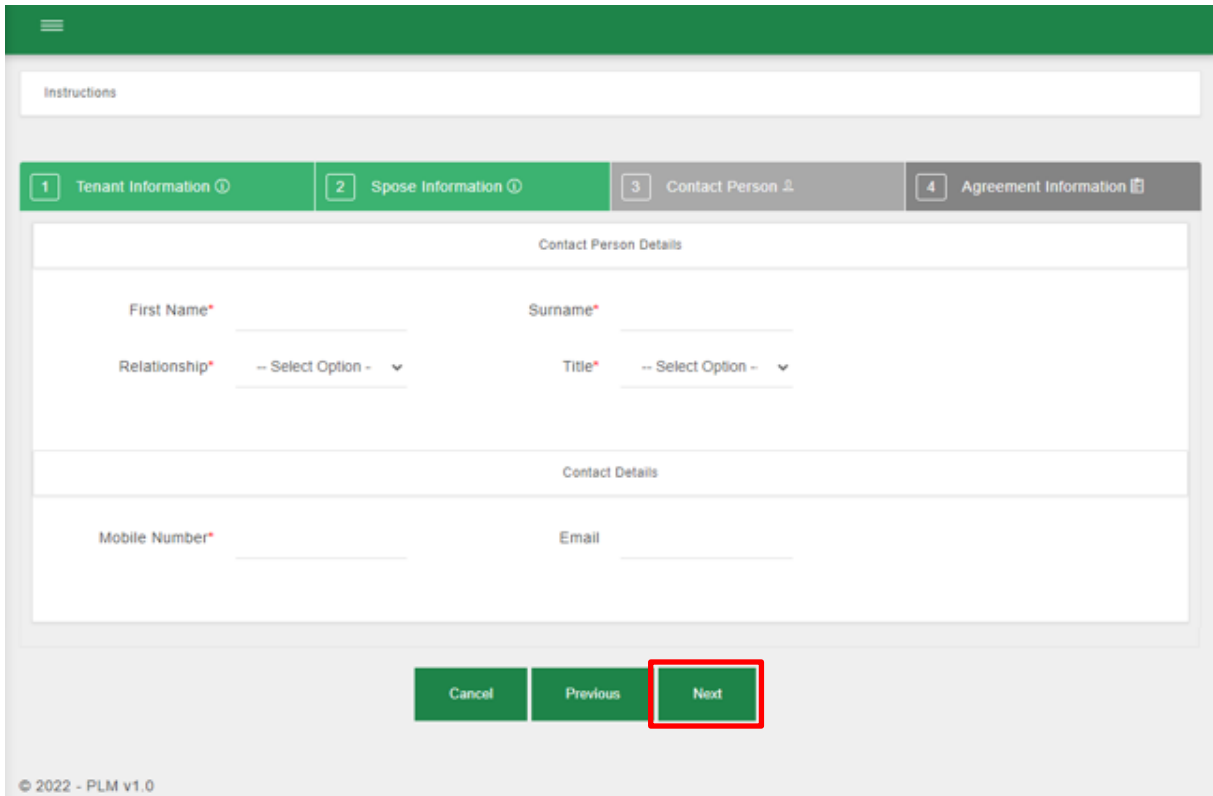



On this screen:

- Input the **Contact Number** and **Email Address**
- Select an **Income Source** option from the dropdown list:
 - Pension
 - Salary
 - SASSA Grant
- Click **Profile** dropdown arrow on the navigation panel.
- Click on the **Sign In** item.
- Capture the **Gross Income** and **Nett Income**
- The **Total Income** will be calculated.
- Under **Current Address**, capture the following:
 - Address
 - Suburb
 - Postal Code
- Click **Next** to proceed to the **Contact Persons** tab.

Screen

Spouse Information

Navigate	
	<p>On this screen:</p> <ul style="list-style-type: none"> Click Profile dropdown arrow on the navigation panel. Click on the Sign In item. Capture the First Name and Last Name Select the Relationship and Title from the dropdown list. Input the Mobile Number and Email Click Next to proceed to the Agreement Information tab.
Screen	
	 <p style="text-align: center;">Contact Person</p>
	<ul style="list-style-type: none"> Under the Agreement Information tab, there will be multiple sub-sections which need to be capture, such as: <ul style="list-style-type: none"> Space Unit Details Leasing Period Communication Billing Information
Navigate	



On this screen:

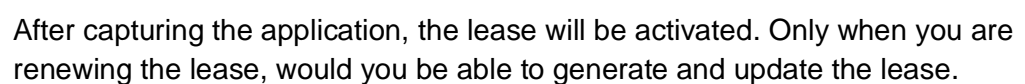
- Select the **Complex/Area** from the dropdown list
- Capture the **Space/ Unit No.**
- Capture the **Solar Ref.**
- Select the following:
 - Income Brackets (eg. R4000 to R5500)
 - Category (eg. Family Unit)
 - Typology (eg. 1 Bedrooms)
- Under the **Leasing Period**, capture the **Start Date**
- The **End Date**, **Renewal Notice** and **Termination Notice** dates will be automated.
- Tick the checkbox of the **Communication Method** which is either **Email** or **SMS**
- **Rental Amount** and **Deposit Amount** fields will be pre-populated based on the **Space Unit details** selected.
- Capture the following:
 - Store Rooms
 - Shade Port Parking
 - Open Parking
 - Open Parking Bay
- Click on the **Submit** button.
- You will be navigated to the **Master Applications** Page.
- A popup will display a **Successfully Captured** notification with the reference number.

Screen

Agreement Information

Agreement Information

Success Captured Notification



Page 19 of 93

11 ADDING AN OCCUPANT TO THE LEASE



After completing this sub-section, you will be able to add an occupant to the lease.



Adding an occupant to the lease is optional.

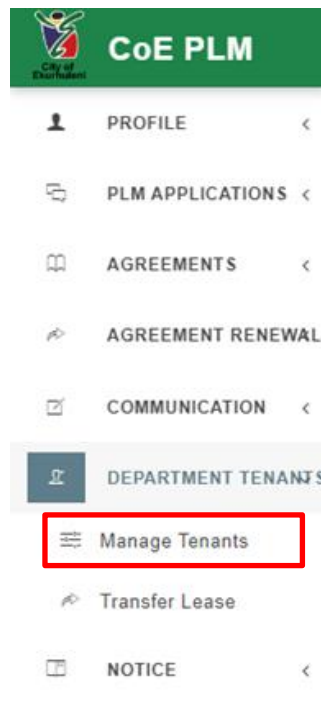
Navigate



On this screen:

- Click **Department Tenants** dropdown arrow on the navigation panel.
- Click **Manage Tenants**
- You will be navigated to the **Tenants Active Leases** page.
- Click on the **Manage** button on the line item of choice.
- You will be navigated to the **Tenant Management** page.

Screen



Navigation Panel

TENANTS ACTIVE LEASES					
Show 10 entries			Search:		
Lease Reference No.	Tenant Name	Application Type	Lease Date	Status	Action
HSD2022111100001	Freddy Sithole	Individual Application	2022/11/11 1:36:49 PM	Active Lease	Manage
HSD2022110800001	RYAN poonsamy	Individual Application	2022/11/08 10:43:45 AM	Active Lease	Manage
HSD2022110700003	shevek poonsamy	Individual Application	2022/11/07 2:22:42 PM	Termination Due To Tenant Notice	Manage
HSD2022110700002	shevek poonsamy	Individual Application	2022/11/07 1:14:07 PM	Active Lease	Manage
HSD2022110700001	Nicole poonsamy	Individual Application	2022/11/07 11:55:38 AM	Active Lease	Manage

Tenant Active Leases Page

Navigate



- On this screen:
- Capture the **First Name** and **Last Name**
 - Input the **Relationship** to the tenant
 - Tick checkbox **Nominated**
 - Input the **Identification Number**
 - Select the **Title** from the dropdown list.
 - Input the **Cell No.** and **Email**
 - Click on the **Add Occupant** button

Screen

1 Tenant Management

Add New Occupant

First Name* _____ Last Name* _____

Relationship* _____ Nominated ☐

Identification Number* _____ Title* -- Select Option -- ▾

Cell No. _____ Email _____

Add Occupant

Return To Manage

Tenant Management

Navigate



On this screen:

- A confirmation popup box will display, **Are you sure you want to add this occupant?** Click **Yes, I am sure!** to acknowledge.
- A success popup box will display, **Agreement Occupant Added Successfully.** Click **OK** to remove popup.

Screen

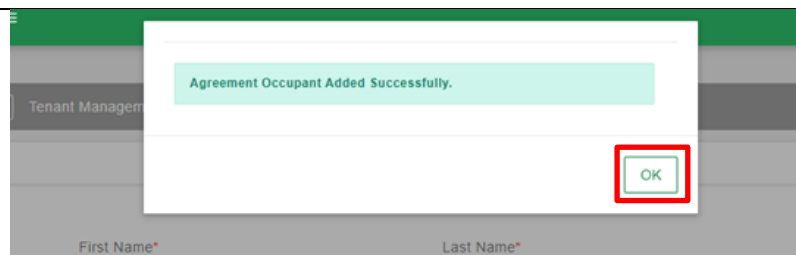
1 Tenant Management

Are you sure you want to add this occupant?

No! **Yes, I am sure!**

Add Occupant

Confirmation Popup



Success Notification



- The occupant details which were just saved will be display in the **List of Active Occupant/s**.
- An occupant can be deactivated on the lease by clicking on the **Deactivate** action button.

Navigate



On this screen:

- Click on the **Upload Documents** button.
- You will be navigated to the **Documents Upload** page.

Screen

1 Tenant Management

Add New Occupant

First Name* Last Name*

Relationship* Nominated ☐

Identification Number* Title* -- Select Option --

Cell No. Email

Add Occupant

LIST OF ACTIVE OCCUPANT/S

Show 1 entries Search:


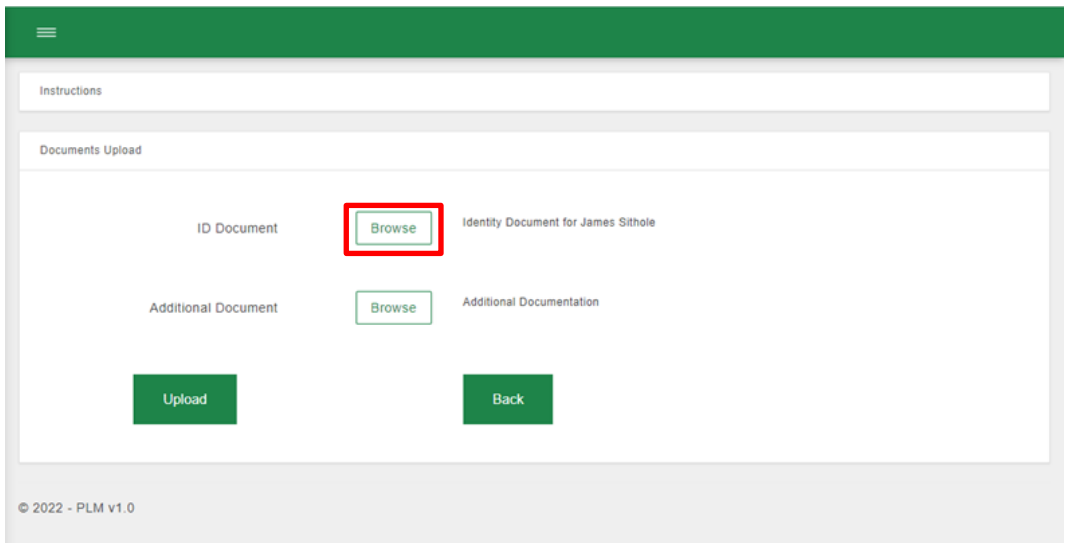
Full Name	Title	Relationship	Identity No.	Status	Action
James Sithole	Mr	Brother	9207095800084	Active Occupant	Deactivate

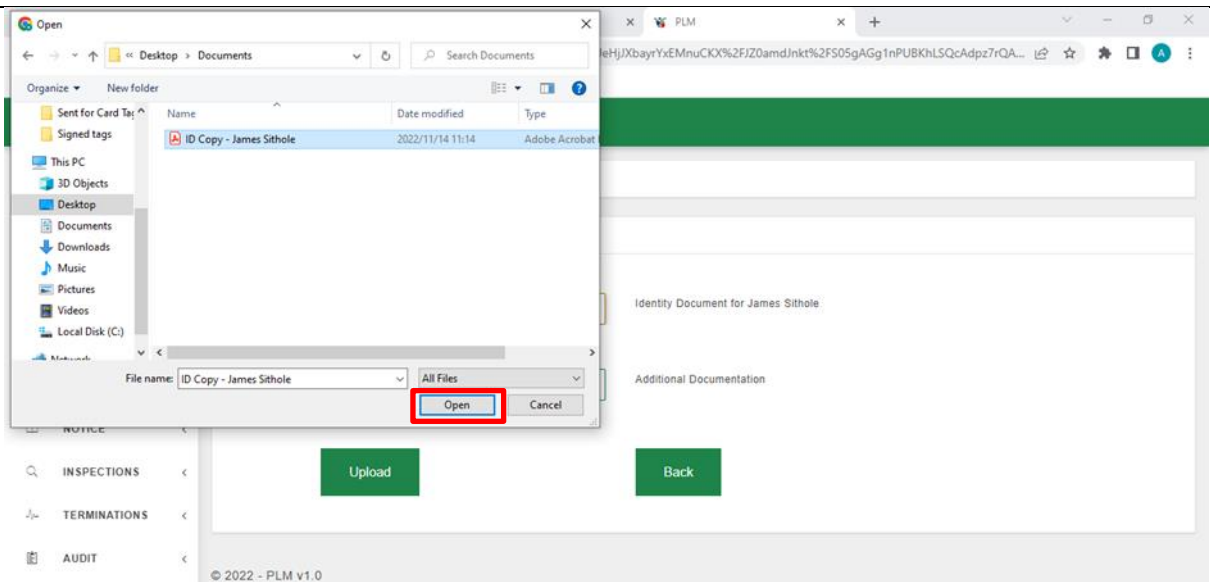
Showing 1 to 1 of 1 entries

Previous 1 Next

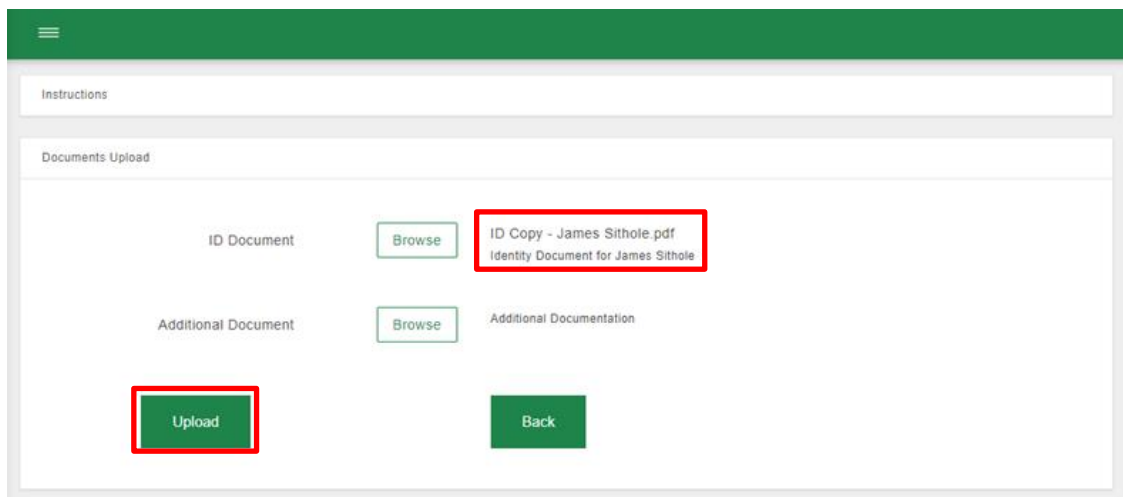
Return To Manage Upload Documents

Tenant Management Page

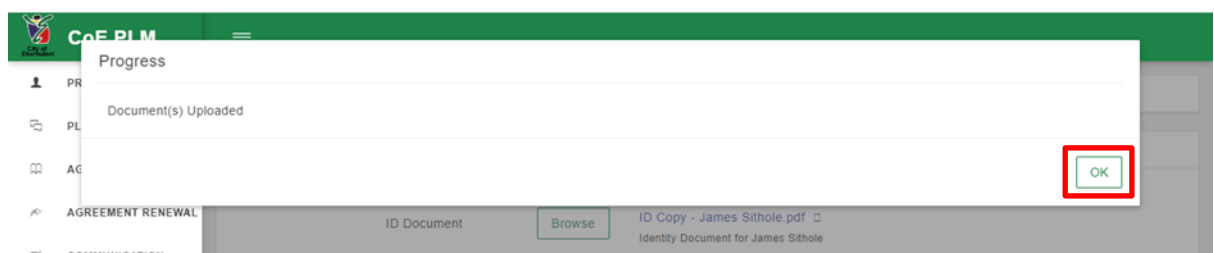
Navigate	
	<p>On this screen:</p> <ul style="list-style-type: none"> • Click on the Browse button. • Select the necessary document from your computer files. • Click on the Open button. • The document will be attached. (The document name will reflect next to the browse button) • Click Upload to proceed with the upload. • A popup notification will display: Document(s) Uploaded. • Click Ok to remove popup box. • The document name will change from black text to blue. • Repeat the above steps to upload an Additional Document (optional). • Click on the Back button. • You will be navigated to the Tenant Management page.
Screen	
 <p style="text-align: center;">Documents Upload Page</p>	



Selecting Document from Computer Files



Documents Attached



Progress Popup – Documents Uploaded

Instructions

Documents Upload

ID Document ID Copy - James Sithole.pdf x
Identity Document for James Sithole

Additional Document Additional Documentation

Uploaded Document

Navigate



On this screen:

- On the **Tenant Management** page, Click **Return to Manage**.
- You will be navigated to the **Tenants Active Leases** page.

Screen

LIST OF ACTIVE OCCUPANT/S

Show 10 entries Search:

Full Name	Title	Relationship	Identity No.	Status	Action
James Sithole	Mr	Brother	9207095800084	Active Occupant	<input type="button" value="Deactivate"/>

Showing 1 to 1 of 1 entries

Previous 1 Next

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Tenant Management Page

TENANTS ACTIVE LEASES					
Show 10 entries			Search:		
Lease Reference No.	Tenant Name	Application Type	Lease Date	Status	Action
HSD2022111400001	Siyanda Ngxongo	Individual Application	2022/11/14 10:02:17 AM	Active Lease	Manage
HSD2022111100001	Freddy Sithole	Individual Application	2022/11/11 1:36:49 PM	Active Lease	Manage
HSD2022110800001	RYAN poonsamy	Individual Application	2022/11/08 10:43:45 AM	Active Lease	Manage
HSD2022110700003	shevek poonsamy	Individual Application	2022/11/07 2:22:42 PM	Termination Due To Tenant Notice	Manage
HSD2022110700002	shevek poonsamy	Individual	2022/11/07	Active Lease	Manage

Tenants Active Leases

You have now successfully completed this sub-section

12 TRANSFERRING A LEASE



After completing this sub-section, you will be able to transfer the lease from the tenant to the spouse/ occupant.



A lease can be transferred in the event of:

- Unemployment/ Other Reasons (transferring to Spouse or another Person)
- Tenant Deceased

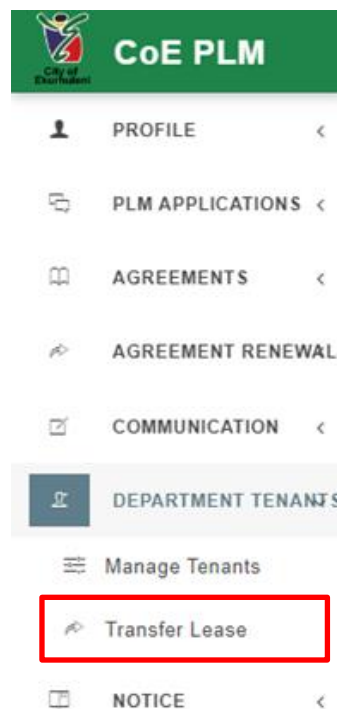
Navigate



On this screen:

- Click **Department Tenants** dropdown arrow on the navigation panel.
- Click **Transfer Lease**
- You will be navigated to the **Agreement of Lease Transfer** page.

Screen



Navigation Panel

Navigate



On this screen:

- Input the **Application Reference Number**
- Click **Submit**
- A confirmation popup box will display, **Are you sure you want to search this application?** Click **Yes, I am sure!** to acknowledge.
- You will be navigated to the **Application Lease Information** page.

Screen

Agreement of Lease Transfer Page

Confirmation Popup




Reason for Transfer:

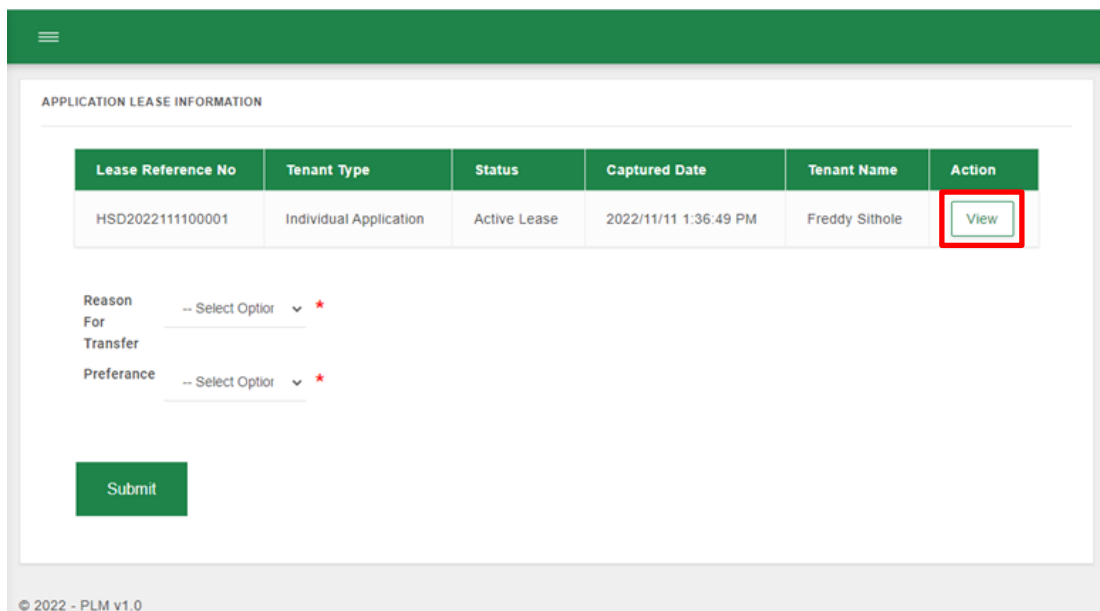
- If option Other is selected, an additional checkbox field (Make main tenant an occupant?) will appear.
- Ticking checkbox “Make main tenant an occupant?” signifies that the tenant will be noted as an occupant after submitting the transfer of the lease. (Not ticking the checkbox, means the initial tenant will not be on the occupant list)

	<p><u>Preference:</u></p> <ul style="list-style-type: none"> When an occupant other than the spouse is chosen and the contact number was not captured for this occupant, an additional field will appear for you to input the mobile number.
--	---

Navigate

	<p>On this screen:</p> <ul style="list-style-type: none"> Clicking on the View button gives you access to view information on the lease, such as: <ul style="list-style-type: none"> Application Details Applicant Details Renewals and Terminations History Documents Select a Reason for Transfer from the dropdown list, such as: <ul style="list-style-type: none"> Tenant Deceased Other Select a Preference Tick checkbox Make main tenant an occupant? Click on the Submit button
---	---

Screen



Application Lease Information Page

APPLICATION LEASE INFORMATION

Lease Reference No	Tenant Type	Status	Captured Date	Tenant Name	Action
HSD2022111100001	Individual Application	Active Lease	2022/11/11 1:36:49 PM	Freddy Sithole	<button>View</button>

Reason
For
Transfer

Other

Preference

James Sithole

Make main tenant an
occupant?
☒

Submit

Application Lease Information Page

Navigate



On this screen:

- A confirmation popup box will display: **Are you sure you want to submit this recommendation?** Click **Yes, I am sure!** to acknowledge.
- A success popup box will display, **Agreement of Lease Successfully Transferred to (New Tenants Name)**. Click **OK** to remove popup.

Screen

Lease Reference No	Tenant Type	Status	Captured Date	Tenant Na
HSD2022111100001	Individual Application	Active Lease	2022/11/11 1:36:49 PM	Freddy Sithole

Reason
For
Transfer

Other

Preference

James Sithole

Make main tenant an
occupant?
☒

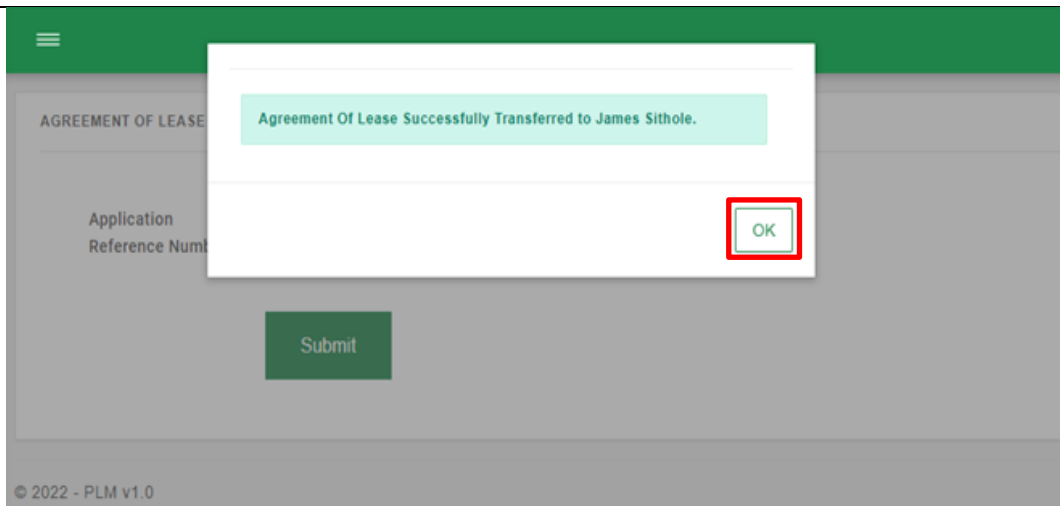
Submit

Are you sure you want to submit this recommendation?

No!

Yes, I am sure!

Confirmation Popup



Success Notification

You have now successfully completed this sub-section

13 RECOMMENDING FOR LEASE RENEWAL



After completing this sub-section, you will be able to recommend for a lease renewal.



- The tenant lease is due to lapse in the next 3 months, and the tenant qualifies for renewal.
- Lease Status: In Awaiting Agreement of Lease Renewal Review

Navigate



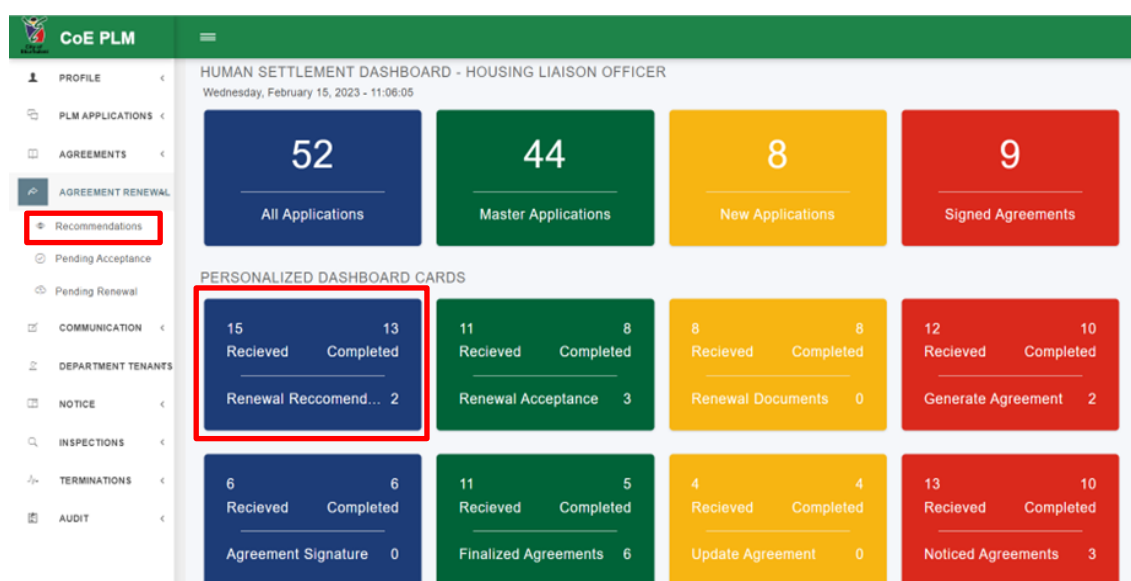
On this screen:

- Click **Renewal Recommendation** on the Dashboard.
- You will be navigated to the **Awaiting Agreement Recommendation** page.


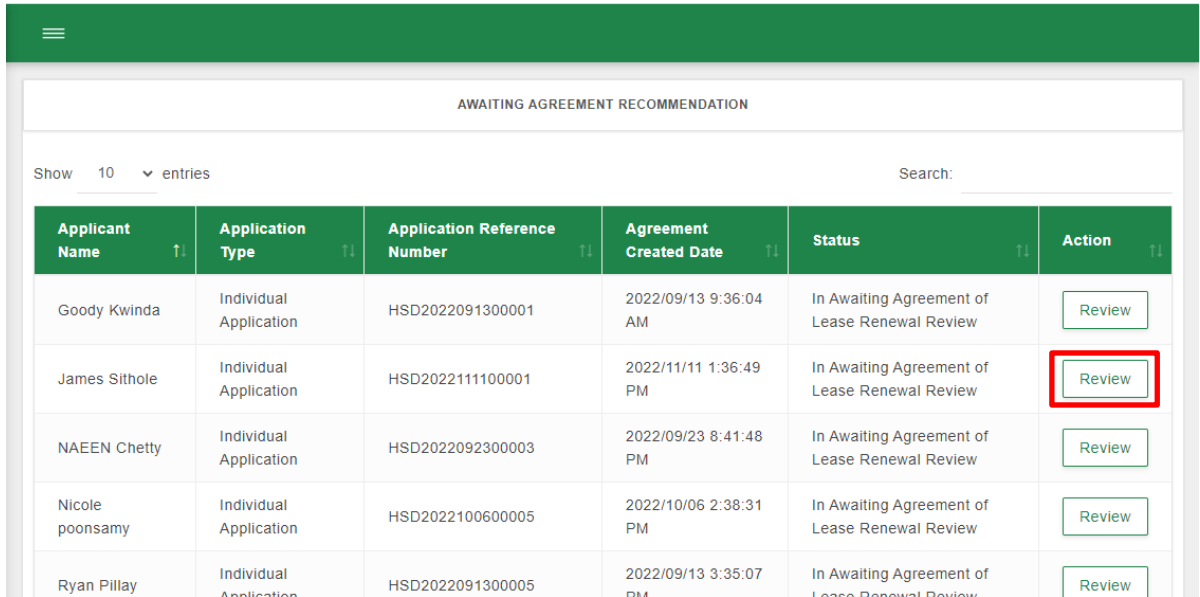


OR

- Click **Agreement Renewal** dropdown arrow on the navigation panel.
- Click **Recommendations**
- You will be navigated to the **Awaiting Agreement Recommendation** page.

Screen



Navigation Panel and Dashboard

Navigate	
	<p>On this screen:</p> <ul style="list-style-type: none"> Click Review button on the line item of choice. You will be navigated to the respective page.
Screen	
 <p style="text-align: center;">Awaiting Agreement Recommendation Page</p>	
	<ul style="list-style-type: none"> Under Evaluating Application sub-section, you are able to view the following information, such as: <ul style="list-style-type: none"> Application Details Applicant Details Renewals and Terminations History Documents Tenant Account Balance and Complaints Against Tenant sub-sections are also viewable.
Navigate	
	<p>On this screen:</p> <ul style="list-style-type: none"> Select an Outcome from the dropdown list: <ul style="list-style-type: none"> Not Renew Renew for 24 months

- Input a **Comment** in the field provided.
- Click on the **Submit** button

Screen

EVALUATING APPLICATION

Show 10 entries Search:

Applicant Name	Application Type	Application Reference Number	Agreement Created Date	Status	Action
James Sithole	Individual Application	HSD2022111100001	2022/11/11 1:36:49 PM	In Awaiting Agreement of Lease Renewal Review	View

Showing 1 to 1 of 1 entries Previous 1 Next

TENANT ACCOUNT BALANCE

Deposit Amount Paid	Amount Due
---------------------	------------

Recommend for Lease Renewal

COMPLAINTS AGAINST TENANT

Complaint Date	Comment	Complaint By
----------------	---------	--------------

Outcome -- Select Option *

Comment *

[Submit](#)

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Recommend for Lease Renewal

Navigate



On this screen:

- A confirmation popup box will display, **Are you sure you want to submit this recommendation?** Click **Yes, I am sure!** to acknowledge.
- You will be navigated to the **Awaiting Agreement Recommendations** page.

Screen	
<div><div><div>PLAINTS AGAINST TENANT</div><div><div>Complaint Date</div><div>Complaint By</div><div>Outcome</div><div>Renew</div><div>Comment</div><div>Happy lease</div><div>Submit</div></div></div><div><div>i</div><div>Are you sure you want to submit this recommendation?</div><div>No! Yes, I am sure!</div></div></div> <div>Confirmation Popup</div>	
	The lease will be sent to the Senior Housing Specialist for viewing and actioning.
You have now successfully completed this sub-section	

14 ACCEPTING A LEASE RENEWAL



After completing this sub-section, you will be able to Accept the Lease Renewal on behalf of the tenant (walk-in).



Once the lease renewal is approved by the regional manager, the lease renewal will be sent to the Housing Liaison Officer to accept the lease renewal.



- The customer/tenant is required to Accept/ Reject the Renewal of the Lease Agreement by either using SMS with the OTP or the Email with the link.
- Should you customer not be able to action the Renewal Lease Agreement using the self-service, she or he will need to visit the offices and the Housing Liaison Officer will action it on the system on their behalf.

Navigate



On this screen:

- Click **Renewal Acceptance** on the Dashboard.
- You will be navigated to the **Awaiting Renewal Acceptance** page.

OR

- Click **Agreement Renewal** dropdown arrow on the navigation panel.
- Click **Pending Acceptance**
- You will be navigated to the **Awaiting Renewal Acceptance** page.

Screen

PROFILE

PLM APPLICATIONS

AGREEMENTS

AGREEMENT RENEWAL

Pending Acceptance

Pending Renewal

COMMUNICATION

DEPARTMENT TENANTS

NOTICE

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AUDIT

HUMAN SETTLEMENT DASHBOARD - HOUSING LIAISON OFFICER

Wednesday, February 15, 2023 - 11:05:22

52

All Applications

44

Master Applications

8

New Applications

9

Signed Agreements

PERSONALIZED DASHBOARD CARDS

15

Recieved

13

Completed

Renewal Reccomend...

2

11

Recieved

8

Completed

Renewal Acceptance

3

8

Recieved

8

Completed

Renewal Documents

0

12

Recieved

10

Completed

Generate Agreement

2

6

Recieved

6

Completed

Agreement Signature

0

11

Recieved

5

Completed

Finalized Agreements

6

4

Recieved

4

Completed

Update Agreement

0

13

Recieved

10

Completed

Noticed Agreements

3

Navigation and Dashboard

Navigate



On this screen:

- Click **Review** button on the line item of choice.
- You will be navigated to the respective page.

Screen

AWAITING RENEWAL ACCEPTANCE					
Show 10 entries			Search:		
Applicant Name	Application Type	Application Reference Number	Agreement Created Date	Status	Action
Comfort v Maja	Individual Application	HSD202211020002	2022/11/02 10:18:35 AM	In Awaiting Tenant Renewal Acceptance	Review
James Sithole	Individual Application	HSD2022111100001	2022/11/11 1:36:49 PM	In Awaiting Tenant Renewal Acceptance	Review
Shevek Poonsamy	Individual Application	HSD2022091500002	2022/09/15 9:28:41 AM	In Awaiting Tenant Renewal Acceptance	Review
shevek poonsamy	Individual Application	HSD2022092600004	2022/09/26 10:48:25 AM	In Awaiting Tenant Renewal Acceptance	Review
shevek poonsamy	Individual Application	HSD2022092600006	2022/09/26 2:26:56 PM	In Awaiting Tenant Renewal Acceptance	Review
shevek	Individual		2022/09/29 2:20:49	In Awaiting Tenant	Review

Awaiting Renewal Acceptance Page



- Under **Evaluating Application** sub-section, you are able to view the following information, such as:
 - Application Details
 - Applicant Details
 - Renewals and Terminations
 - History
 - Documents

Navigate



On this screen:

- Select **Action** as **Approved**
- Input the **One Time Pin** provided by the customer
- Click on the **Verify** button

Screen

EVALUATING APPLICATION

Show 10 entries Search:

Applicant Name	Application Type	Application Reference Number	Agreement Created Date	Status	Action
James Sithole	Individual Application	HSD2022111100001	2022/11/11 1:36:49 PM	In Awaiting Tenant Renewal Acceptance	View

Showing 1 to 1 of 1 entries Previous 1 Next

ACTION -- Select Option *

ONE TIME PIN *

Verify

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Accepting a Lease Renewal

Navigate



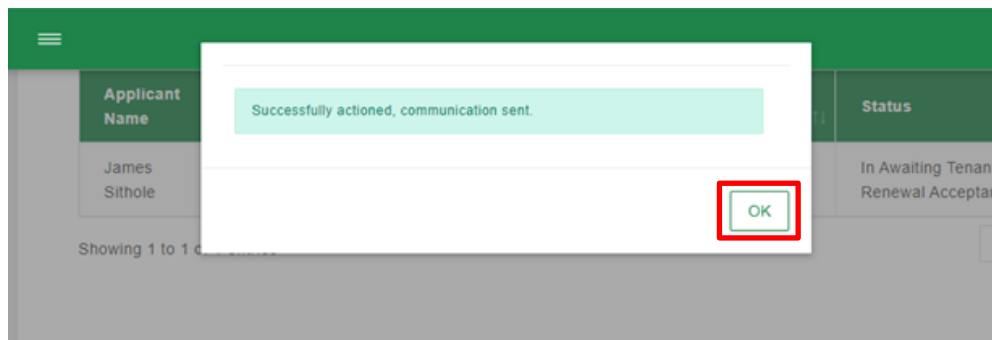
On this screen:

- A confirmation popup box will display, **Are you sure you want to submit this action?** Click **Yes, I am sure!** to acknowledge.
- A success popup box will display, **Successfully actioned, communication sent.** Click **OK**.
- You will be navigated to the **Awaiting Renewal Acceptance** page.

Screen



Confirmation Popup



Success Notification



The status will be updated to “In Awaiting Agreement of Lease Renewal” and the lease will move to the Awaiting Agreement Renewal queue.

You have now successfully completed this sub-section

15 RENEW LEASE



After completing this sub-section, you will be able to renew a lease by uploading all documents.



To upload renewal documents, the status must be "In Awaiting Agreement of Lease Renewal".

Navigate



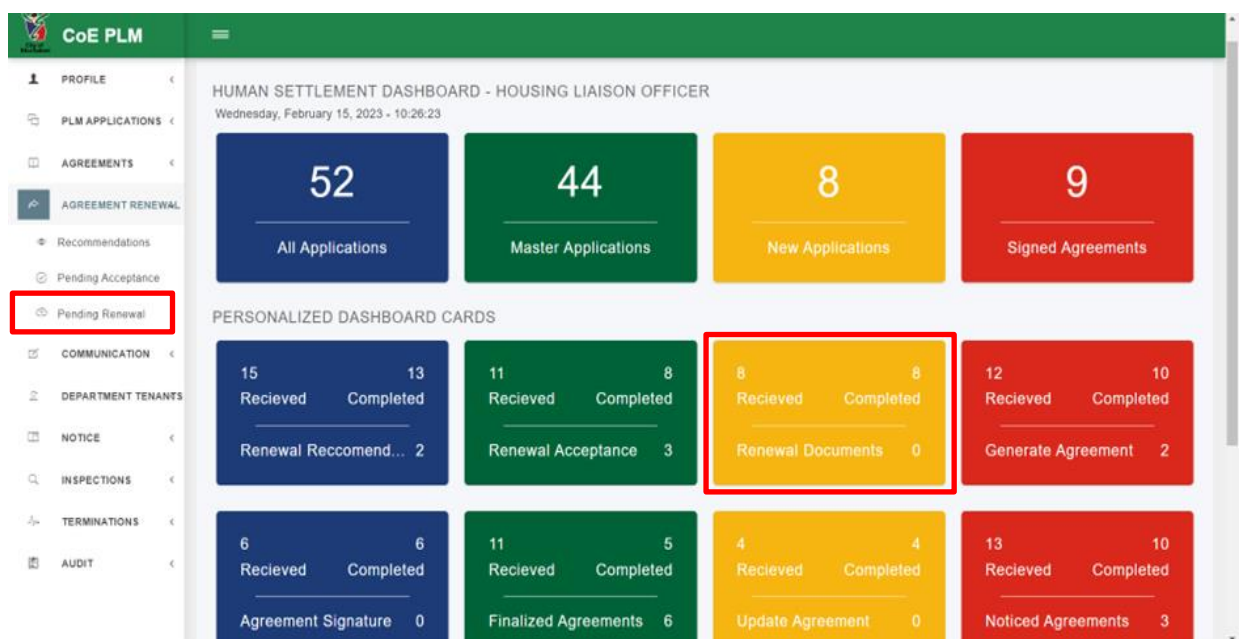
On this screen:

- Click **Renewal Documents** on the Dashboard.
- You will be navigated to the **Awaiting Agreement Renewal** page.

OR

- Click **Agreement Renewal** dropdown arrow on the navigation panel.
- Click Pending Renewal
- You will be navigated to the **Awaiting Agreement Renewal** page.

Screen



Navigation Panel and Dashboard

Navigate



On this screen:

- Click **Renewal Documents** button on the line item of choice.
- You will be navigated to the respective page.

Screen

Applicant Name	Application Type	Application Reference Number	Agreement Created Date	Status	Action
James Sithole	Individual Application	HSD2022111100001	2022/11/11 1:36:49 PM	In Awaiting Agreement of Lease Renewal	Renewal Documents

Showing 1 to 1 of 1 entries

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Awaiting Agreement Renewal Page



- Under **Evaluating Application** sub-section, you are able to view the following information, such as:
 - Application Details
 - Applicant Details
 - Renewals and Terminations
 - History
 - Documents

Navigate



On this screen:

- Click on the **Browse** button.
- Select the necessary document from your computer files.
- Click on the **Open** button.
- The document will be attached. (The document name will reflect next to the browse button)
- Click **Upload** to proceed with the upload.

- A popup notification will display: **Document(s) Uploaded.**
- Click **Ok** to remove popup box.
- The document name will change from black text to blue.
- Repeat the above steps to upload all documents.
- Click on the **Finish** button.
- You will be navigated to the **Awaiting Agreement Renewal** page.

Screen

The screenshot shows the 'EVALUATING APPLICATION' page. At the top, there's a green header with a menu icon. Below it, a table lists application details. The table has columns: Applicant Name, Application Type, Application Reference Number, Agreement Created Date, Status, and Action. One entry is visible for James Sithole. Below the table, there's a 'Documents Upload' section with two rows: 'Identity Document' and 'Payslip/Proof of Pension Grant'. Each row has a 'Browse' button. The 'Identity Document' 'Browse' button is highlighted with a red box.

Applicant Name	Application Type	Application Reference Number	Agreement Created Date	Status	Action
James Sithole	Individual Application	HSD2022111100001	2022/11/11 1:36:49 PM	In Awaiting Agreement of Lease Renewal	View

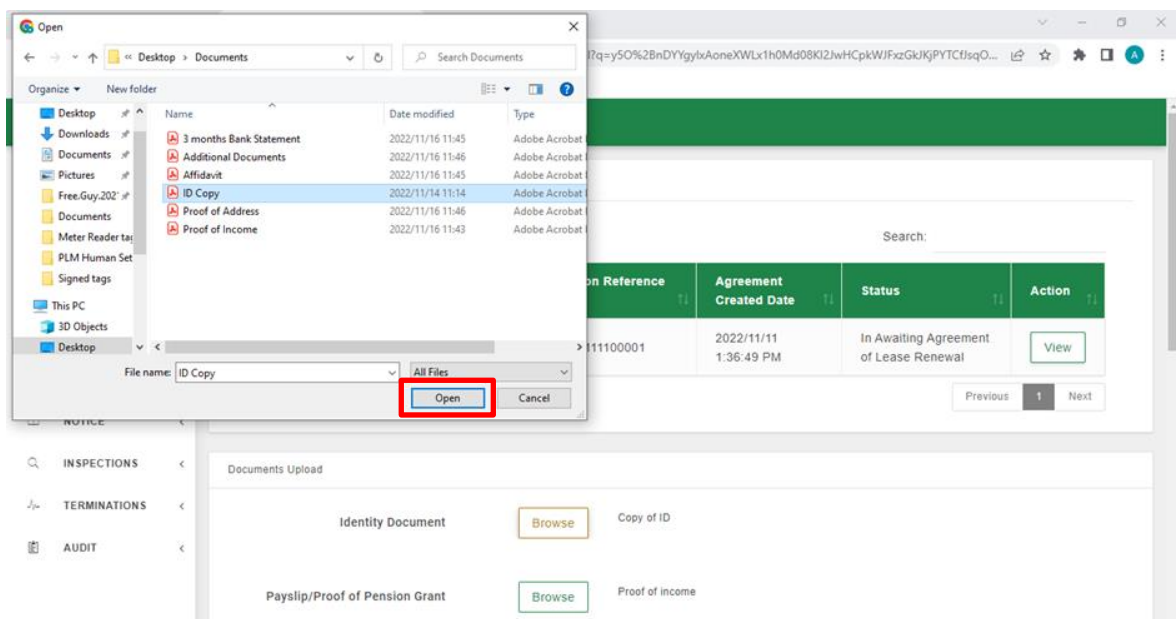
Showing 1 to 1 of 1 entries

Documents Upload

Identity Document [Browse](#) Copy of ID

Payslip/Proof of Pension Grant [Browse](#) Proof of Income

Documents Upload



Selecting Document from Computer Files

Documents Upload

Identity Document	Browse	ID Copy.pdf Copy of ID
Payslip/Proof of Pension Grant	Browse	Proof of income
Confirmation of Employment	Browse	Proof of employment
Affidavit Document	Browse	Affidavit
Proof of Residential Address	Browse	Copy of Proof of Address
Additional Document	Browse	Additional Documentation
Upload		Finish

Documents Attached

CoE PLM

Progress

Document(s) Uploaded

[OK](#)

AGREEMENT RENEWAL

COMMUNICATION

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NOTICE

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TERMINATIONS

Proof of Residential Address

[Browse](#)

Copy of Proof of Address

Additional Document

[Browse](#)

Additional Documentation

[Upload](#)

[Finish](#)

Progress Popup – Documents Uploaded

Documents Upload

Identity Document	Browse	ID Copy.pdf ✕ Copy of ID
Payslip/Proof of Pension Grant	Browse	Proof of Income.pdf ✕ Proof of income
Confirmation of Employment	Browse	Proof of Employment.pdf ✕ Proof of employment
Affidavit Document	Browse	Affidavit.pdf ✕ Affidavit
Proof of Residential Address	Browse	Proof of Address.pdf ✕ Copy of Proof of Address
Additional Document	Browse	Additional Documents.pdf ✕ Additional Documentation
Upload		Finish

Uploaded Document

AWAITING AGREEMENT RENEWAL					
Show 10 entries			Search:		
Applicant Name	Application Type	Application Reference Number	Agreement Created Date	Status	Action
No data available in table					
Showing 0 to 0 of 0 entries					<div>Previous</div> <div>Next</div>
© 2022 - PLM v1.0					

Awaiting Agreement Renewal Page



The lease agreement will move to the Generate Lease Agreement queue.

You have now successfully completed this sub-section

16 GENERATING A LEASE AGREEMENT



After completing this sub-section, you will be able to generate a lease agreement.



The status must be "In Awaiting Lease Agreement".

Navigate



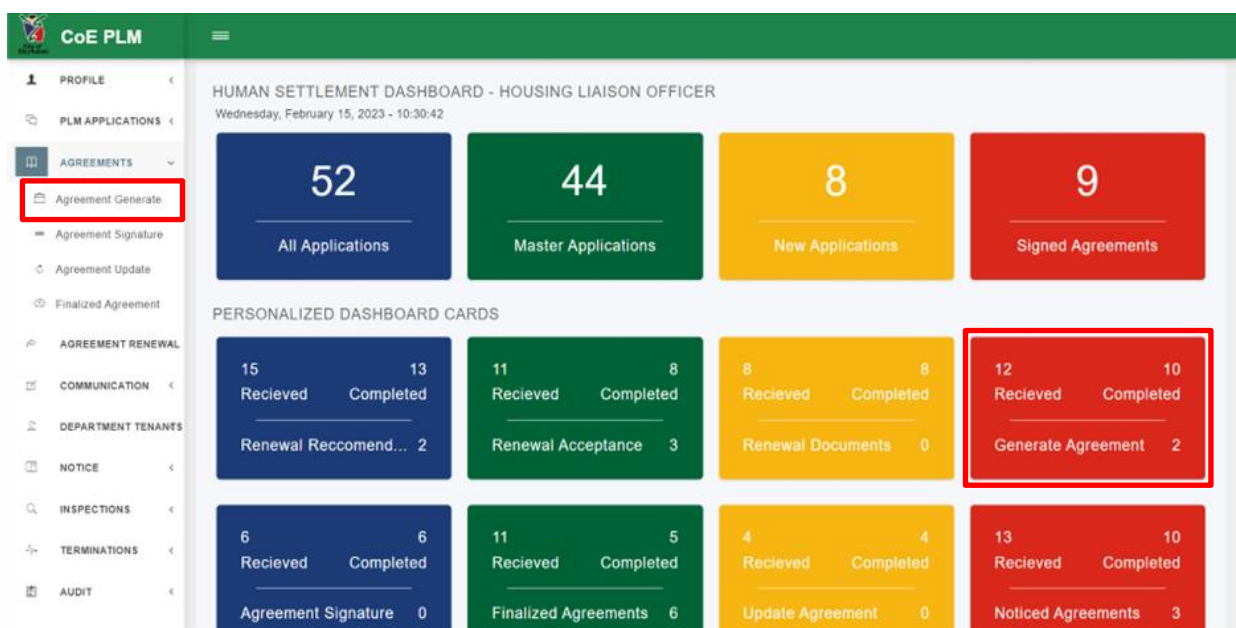
On this screen:

- Click **Generate Agreement** on the Dashboard.
- You will be navigated to the **Generate Lease Agreement** page.

OR

- Click **Agreements** dropdown arrow on the navigation panel.
- Click Agreement Generate
- You will be navigated to the **Generate Lease Agreement** page.

Screen



Navigation Panel and Dashboard

Navigate



On this screen:

- Click **Generate Lease Agreement** button on the line item of choice.
- You will be navigated to the respective page with a popup notification displaying, **Agreement of lease Successfully Generated**.
- Click **Ok**, to remove popup.

Screen

GENERATE LEASE AGREEMENT

Show 10 entries Search:

Applicant Name	Application Type	Application Reference Number	Application Created Date	Status	Action
James Sithole	Individual Application	HSD2022111100001	2022/11/11 1:36:48 PM	In Awaiting Lease Agreement	Generate Lease Agreement

Showing 1 to 1 of 1 entries Previous 1 Next

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Generate Lease Agreement Page

Agreement of Lease Successfully Generated!

OK

Notification Popup

Navigate



On this screen:

- Under **Generate Lease Agreement** sub-section, click on the **View** button to download the document.
- Open the downloaded **Lease Agreement** for viewing.
- Click **Finish**.
- You will be re-directed to the **Generate Lease Agreement** page.

Screen

EVALUATING APPLICATION

Show 10 entries

Search:

Reference Number	Applicant Type	Status	Captured Date	Customer Name	Action
HSD2022111100001	Individual Application	In Awaiting Lease Agreement	2022/11/11 1:36:48 PM	James Sithole	View

Showing 1 to 1 of 1 entries

Previous

1

Next

GENERATED LEASE AGREEMENT

Document Type	Document
Agreement Of Lease	View

Generating a Lease

ANNEXURE E

1 / 9 | 100% +

1

2

3

AGREEMENT OF LEASE

MADE AND ENTERED INTO BY AND BETWEEN:

EKURHULENI METROPOLITAN MUNICIPALITY

(Hereinafter referred to as the **LESSOR** on the one part)

And

James Sithole

ID NUMBER: 9207095800084

Hereinafter referred to as the **LESSEE** on the other part

NOW, THEREFORE THE PARTIES AGREE AS FOLLOWS:

- That the **LESSOR** is the registered owner of Unit no. 12 Andries Scribante Old Age Home, Southern (hereinafter called **THE UNIT**)
- That the **LESSOR** is prepared to let the unit to the **LESSEE**, and the **LESSEE** is

Agreement of Lease

GENERATED LEASE AGREEMENT

Document Type	Document
Agreement Of Lease	View

Finish

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Completed Generating a Lease Agreement

Page 48 of 93

GENERATE LEASE AGREEMENT

Show 10 entries

Search:

Applicant Name	Application Type	Application Reference Number	Application Created Date	Status	Action
No data available in table					

Showing 0 to 0 of 0 entries

Previous

Next

© 2022 - PLM v1.0

Generate Lease Agreement Page



The lease agreement will be routed to the Senior Housing Specialist for reviewing and actioning.

You have now successfully completed this sub-section

17 SIGNING AN AGREEMENT OF LEASE



After completing this sub-section, you will be able to sign an agreement of lease.



Once the Regional Manager has approved the Agreement of Lease, the tenant will need to sign the Lease Agreement.



- The customer/tenant is required to Accept/ Reject the Agreement of Lease by either using SMS with the OTP or the Email with the link.
- Should the tenant not be able to action the Agreement of Lease using the self-service, he or she will need to visit the offices and the Housing Liaison Officer will action it on the system on their behalf.

Navigate



On this screen:

- Click **Agreement Signature** on the Dashboard.
- You will be navigated to the **Awaiting Applicant's Signature** page.

OR

- Click **Agreements** dropdown arrow on the navigation panel.
- Click Agreement Signature
- You will be navigated to the **Awaiting Applicant's Signature** page.

Screen

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Agreement Generate

Agreement Signature

Agreement Update

Finalized Agreement

AGREEMENT RENEWAL

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HUMAN SETTLEMENT DASHBOARD - HOUSING LIAISON OFFICER

Wednesday, February 15, 2023 - 10:41:35

52

All Applications

44

Master Applications

8

New Applications

9

Signed Agreements

PERSONALIZED DASHBOARD CARDS

15

Recieved

13

Completed

Renewal Reccomend... 2

11

Recieved

8

Completed

Renewal Acceptance 3

8

Recieved

8

Completed

Renewal Documents 0

12

Recieved

10

Completed

Generate Agreement 2

6

Recieved

6

Completed

Agreement Signature 0

11

Recieved

5

Completed

Finalized Agreements 6

4

Recieved

4

Completed

Update Agreement 0

13

Recieved

10

Completed

Noticed Agreements 3

Navigation Panel and Dashboard

Navigate



On this screen:

- Click **Signature** button on the line item of choice.
- You will be navigated to the respective page.

Screen

AWAITING APLICANTS SIGNATURE					
Show 10 entries			Search:		
Applicant Name	Application Type	Application Reference Number	Application Created Date	Status	Action
James Sithole	Individual Application	HSD2022111100001	2022/11/11 1:36:48 PM	In Awaiting Applicant Signature	Signature
RYAN poonsamy	Individual Application	HSD2022103100001	2022/10/31 12:34:47 PM	In Awaiting Applicant Signature	Signature
shevek poonsamy	Individual Application	HSD2022091300002	2022/09/13 12:19:03 PM	In Awaiting Applicant Signature	Signature
Shevek Poonsamy	Individual Application	HSD2022091400002	2022/09/14 3:16:10 PM	In Awaiting Applicant Signature	Signature
shevek	Individual	HSD2022101400004	2022/10/14 11:47:21	In Awaiting Applicant	Signature

Awaiting Applicant's Signature Page



- Under **Evaluating Application** sub-section, you are able to view the following information, such as:
 - Application Details
 - Applicant Details
 - Renewals and Terminations
 - History
 - Documents

Navigate



On this screen:

- Under **Generated Agreement of Lease** sub-section, click on the **View** button to download the document.
- Open the downloaded **Agreement of Lease** for viewing.
- Click on the **Signature** dropdown and make a selection.
- Select **Approval Action** as **Approved**
- Input the **One Time Pin** provided by the customer
- Click on the **Verify** button

Screen

EVALUATING APPLICATION

Show 10 entries Search:

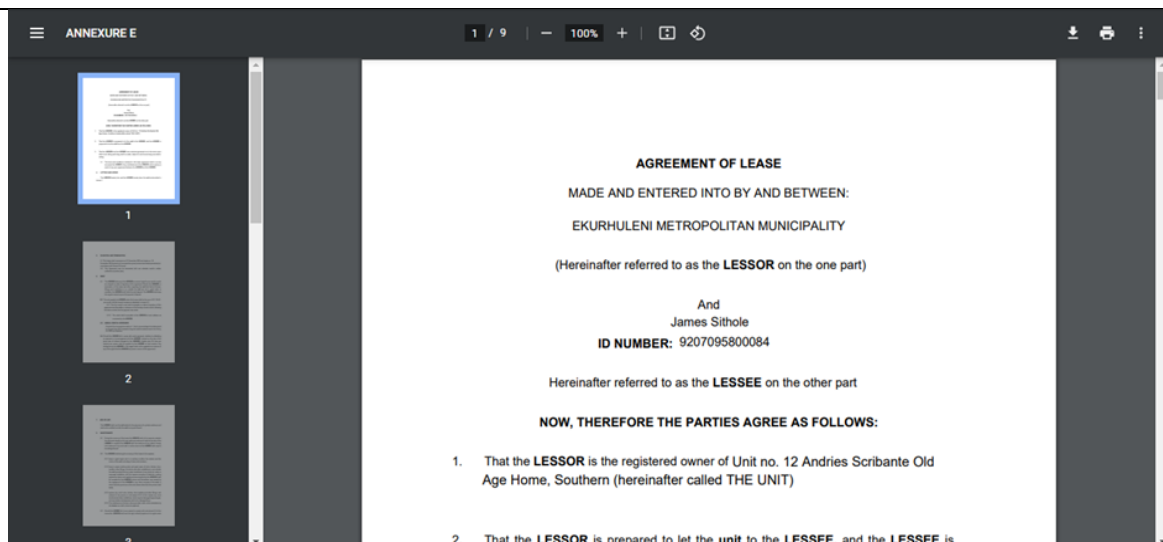
Reference Number	Applicant Type	Status	Captured Date	Customer Name	Action
HSD2022111100001	Individual Application	In Awaiting Applicant Signature	2022/11/11 1:36:48 PM	James Sithole	View

Showing 1 to 1 of 1 entries Previous 1 Next

GENERATED AGREEMENT OF LEASE

Document Type	Document	Action
Agreement Of Lease	View	Signature -- Select Option --

Signing an Agreement of Lease



Agreement of Lease

GENERATED AGREEMENT OF LEASE

Document Type	Document	Action
Agreement Of Lease	View	Signature -- Select Option -- *

Approval Action -- Select Option -- *

One *

Time Pin

[Verify](#)

Signing an Agreement of Lease

GENERATED AGREEMENT OF LEASE

Document Type	Document	Action
Agreement Of Lease	View	Signature Approve *

Approval Action Approve *

One 8201 *

Time Pin

[Verify](#)

Signing an Agreement of Lease

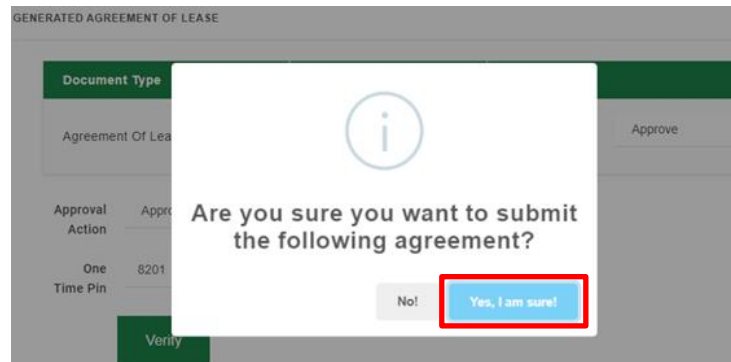
Navigate



On this screen:

- A confirmation popup box will display, **Are you sure you want to submit the following agreement?** Click **Yes, I am sure!** to acknowledge.
- You will be navigated to the **Awaiting Agreement Recommendations** page.

Screen



Confirmation Popup

Applicant Name	Application Type	Application Reference Number	Application Created Date	Status	Action
RYAN poonsamy	Individual Application	HSD2022103100001	2022/10/31 12:34:47 PM	In Awaiting Applicant Signature	<button>Signature</button>
shevek poonsamy	Individual Application	HSD2022091300002	2022/09/13 12:19:03 PM	In Awaiting Applicant Signature	<button>Signature</button>
Shevek Poonsamy	Individual Application	HSD2022091400002	2022/09/14 3:16:10 PM	In Awaiting Applicant Signature	<button>Signature</button>
shevek poonsamy	Individual Application	HSD2022101400004	2022/10/14 11:47:21 AM	In Awaiting Applicant Signature	<button>Signature</button>

Awaiting Applicant's Signature Page



The lease agreement will move to the Finalized Agreement queue.

You have now successfully completed this sub-section

18 FINALIZE LEASE AGREEMENT



After completing this sub-section, you will be able to finalize the lease agreement.



To finalize the lease agreement the status will be “In Awaiting Upload Final Agreement of Lease”.

Navigate



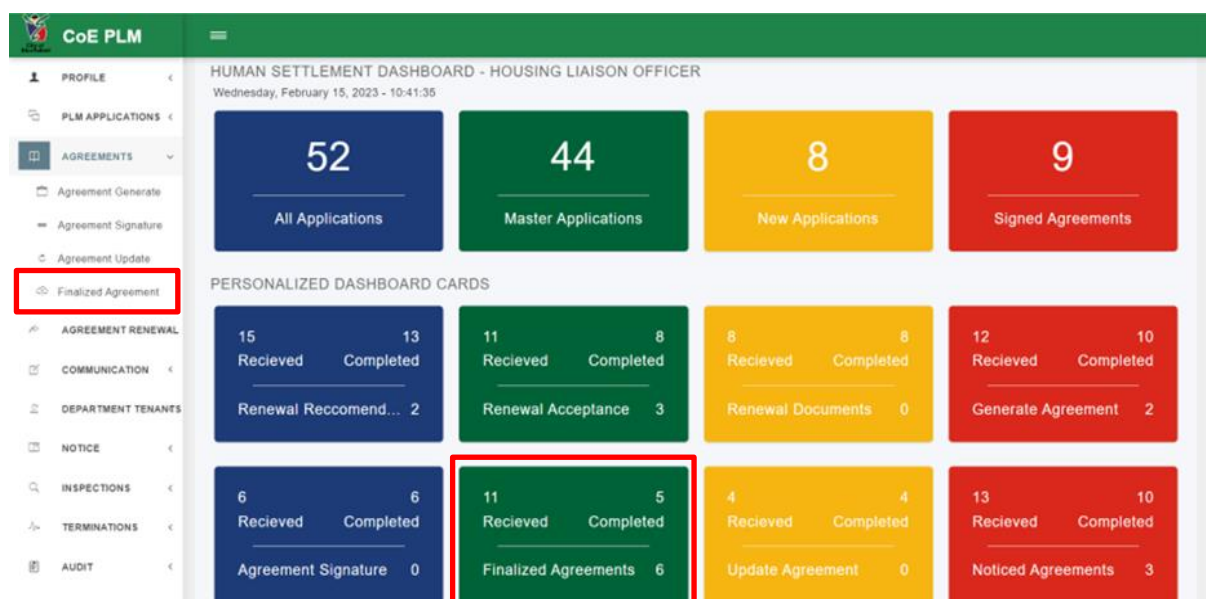
On this screen:

- Click **Finalized Agreement** on the Dashboard.
- You will be navigated to the **Finalized Agreement of Lease** page.

OR

- Click **Agreements** dropdown arrow on the navigation panel.
- Click Finalized Agreement
- You will be navigated to the **Finalized Agreement of Lease** page.

Screen



Navigation Panel and Dashboard

Navigate



On this screen:

- Click **Upload Final Agreement** button on the line item of choice.
- You will be navigated to the respective page.

Screen

Finalized Agreement of Lease Page



- Under **Evaluating Application** sub-section, you are able to view the following information, such as:
 - Application Details
 - Applicant Details
 - Renewals and Terminations
 - History
 - Documents
- Under **Generated Agreement of Lease** sub-section, you are able to download and view the Agreement of Lease.

Navigate

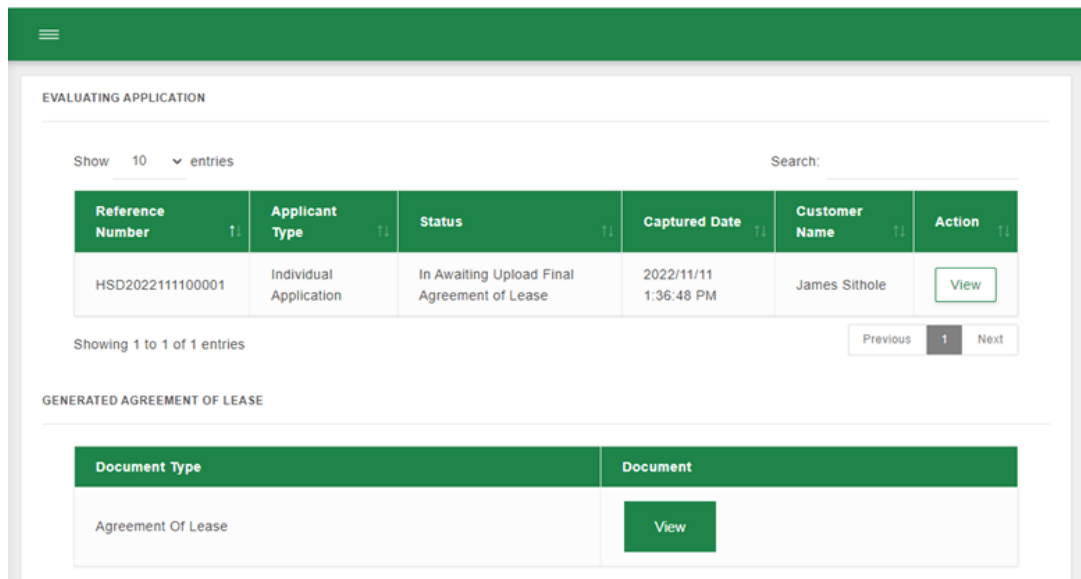


On this screen:

- Click on the **Browse** button.
- Select the necessary document from your computer files.
- Click on the **Open** button.
- The document will be attached. (The document name will reflect next to the browse button)

- Click **Upload** to proceed with the upload.
- A popup notification will display: **Document(s) Uploaded.**
- Click **Ok** to remove popup box.
- The document name will change from black text to blue.
- Select **Approval Action** as **Approved**
- Click on the **Submit** button.

Screen



EVALUATING APPLICATION

Show 10 entries Search:

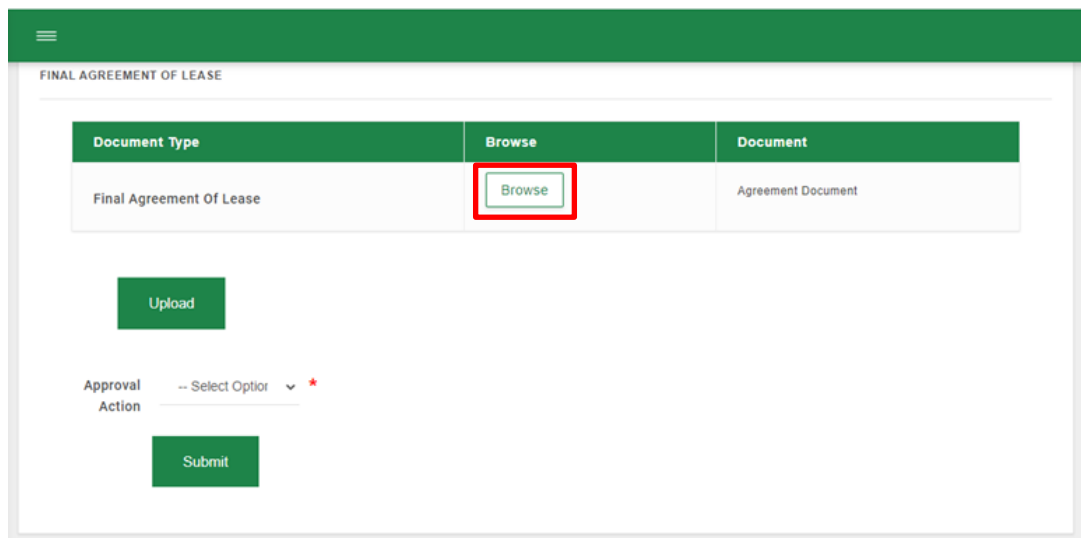
Reference Number	Applicant Type	Status	Captured Date	Customer Name	Action
HSD2022111100001	Individual Application	In Awaiting Upload Final Agreement of Lease	2022/11/11 1:36:48 PM	James Sithole	View

Showing 1 to 1 of 1 entries Previous 1 Next

GENERATED AGREEMENT OF LEASE

Document Type	Document
Agreement Of Lease	View

Final Agreement of Lease



FINAL AGREEMENT OF LEASE

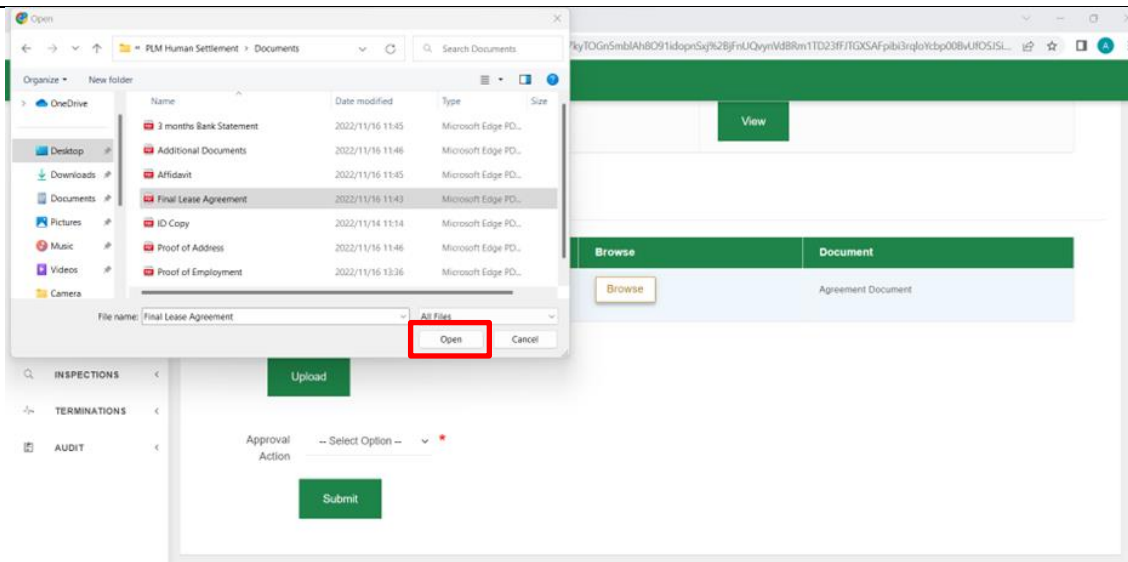
Document Type	Browse	Document
Final Agreement Of Lease	Browse	Agreement Document

[Upload](#)

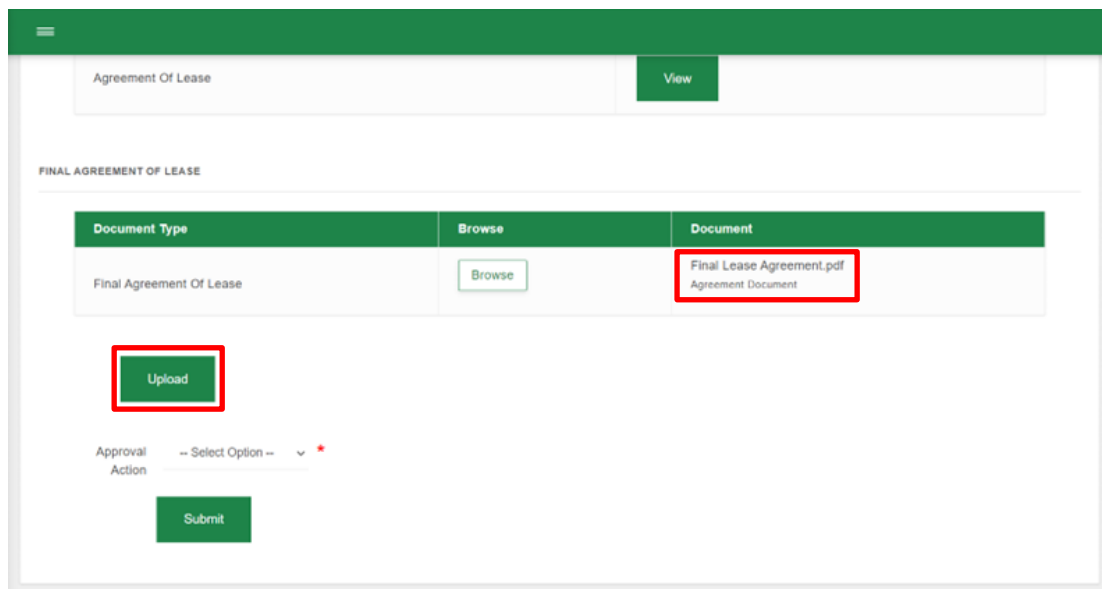
Approval Action -- Select Option *

[Submit](#)

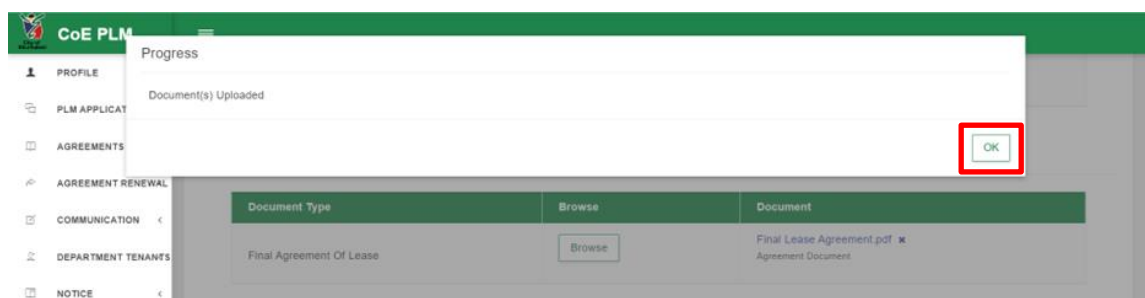
Final Agreement of Lease



Selecting Document from Computer Files



Document Attached



Progress Popup – Documents Uploaded

Agreement Of Lease

View

FINAL AGREEMENT OF LEASE

Document Type	Browse	Document
Final Agreement Of Lease	Browse	Final Lease Agreement.pdf Agreement Document

Upload

Approval

-- Select Option --

Action

Submit

Uploaded Document

Agreement Of Lease

View

FINAL AGREEMENT OF LEASE

Document Type	Browse	Document
Final Agreement Of Lease	Browse	Final Lease Agreement.pdf Agreement Document

Upload

Approval

Approve

Action

Submit

Finalize Agreement of Lease

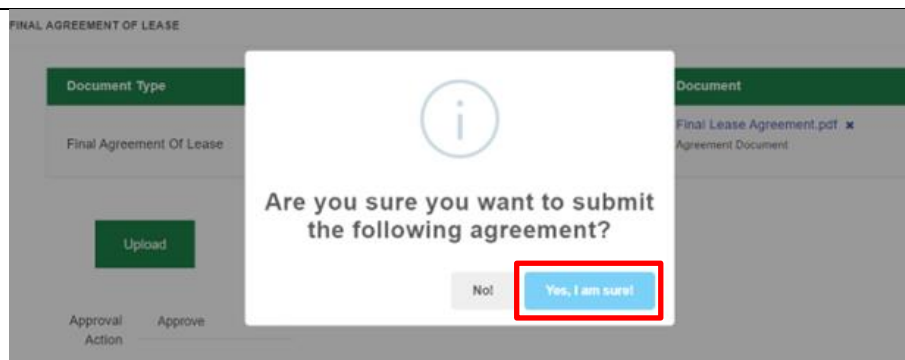
Navigate



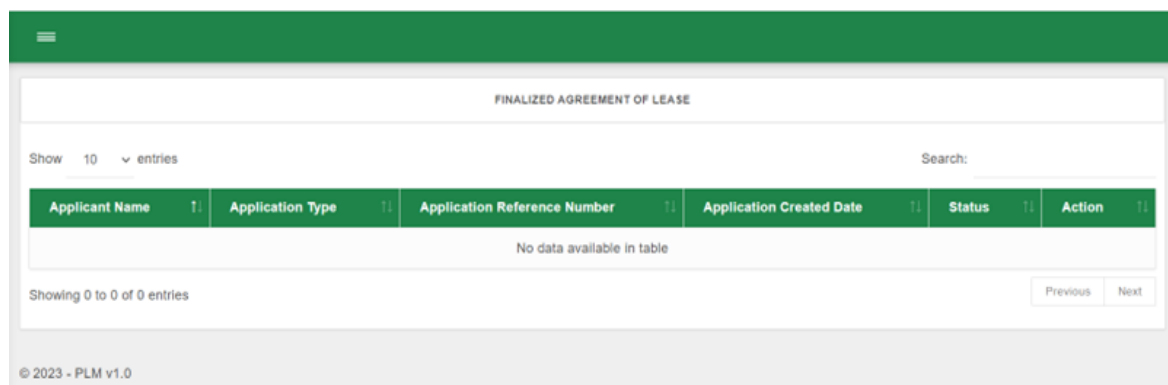
On this screen:

- A confirmation popup box will display, **Are you sure you want to submit the following agreement?** Click **Yes, I am sure!** to acknowledge.
- You will be navigated to the **Finalized Agreement of Lease** page.

Screen



Confirmation Popup



Finalized Agreement of Lease Page

You have now successfully completed this sub-section

19 TENANT SERVING NOTICE



After completing this sub-section, you will be able to assist the tenant in serving notice of the lease termination.

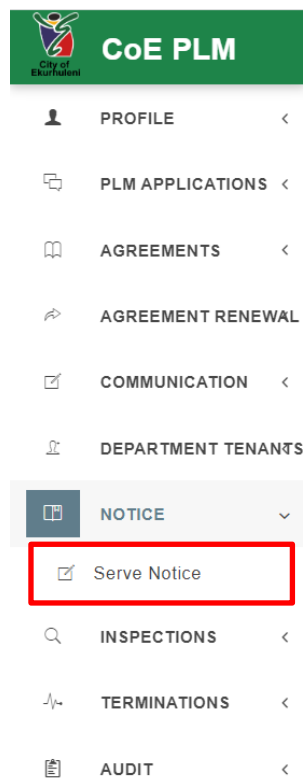
Navigate



On this screen:

- Click **Notice** dropdown arrow on the navigation panel.
- Click **Serve Notice**
- You will be navigated to the **Serve Agreement Termination Notice** page.

Screen



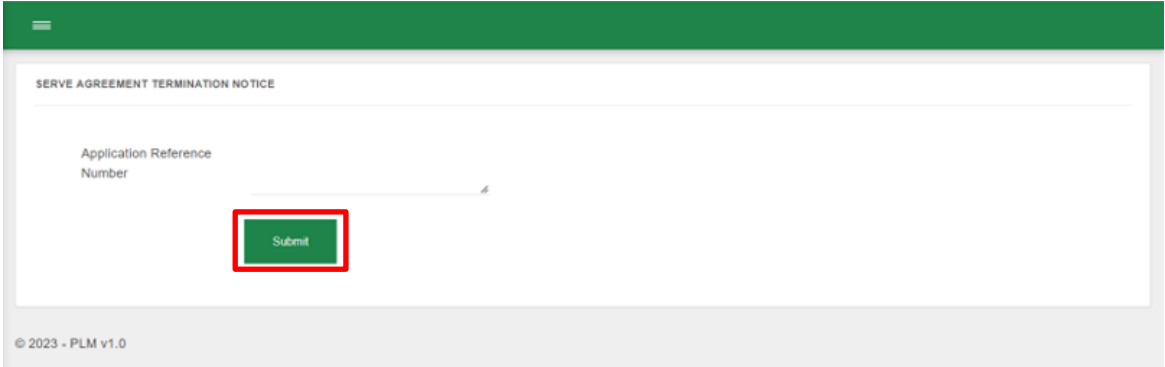
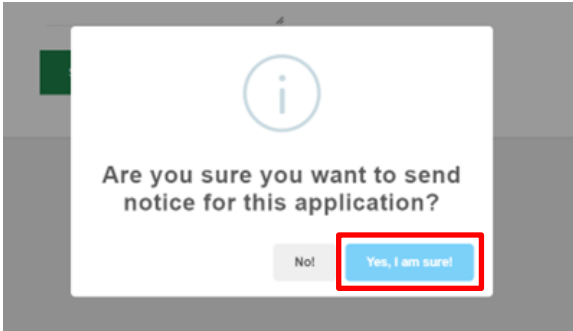


Navigation Panel and Dashboard

Navigate



On this screen:

- Input the **Application Reference Number**

	<ul style="list-style-type: none"> Click Submit A confirmation popup box will display, Are you sure you want to send notice for this application? Click Yes, I am sure! to acknowledge. You will be navigated to the respective page.
Screen	
 <p style="text-align: center;">Serve Agreement Termination Notice Page</p>  <p style="text-align: center;">Confirmation Popup</p>	
	<p>Please select full calendar month. (The Notice Date has to be the last day of the full calendar month)</p>
Navigate	
	<p>On this screen:</p> <ul style="list-style-type: none"> Select the Notice Date from the Calendar A confirmation popup box will display, Are you sure you want to send notice for this application? Click Yes, I am sure! to acknowledge. You will be navigated to the Serve Agreement Termination Notice page, with a Success notification displayed. Click Ok to remove popup.

Screen

EVALUATING APPLICATION

Show 10 entries Search:

Applicant Name	Application Type	Application Reference Number	Agreement Created Date	Status	Action
Siyanda Nxongo	Individual Application	HSD2023020800001	2023/02/08 2:17:50 PM	Active Lease	View

Showing 1 to 1 of 1 entries

Previous 1 Next

Notice Date yyyy/mm/dd

Submit

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Serve Agreement Termination Notice

Are you sure you want to send notice for this application?

Not **Yes, I am sure!**

Confirmation Popup

Success!

OK

Success Notification



The Lease Agreement will move to the Noticed Agreements queue for the next step.

You have now successfully completed this sub-section

20 NOTICED AGREEMENTS



After completing this sub-section, you will be able to action the noticed agreement.

Navigate



On this screen:

- Click **Noticed Agreements** on the Dashboard.
- You will be navigated to the **Noticed Agreement Terminations** page.

OR

- Click **Terminations** dropdown arrow on the navigation panel.
- Click **Terminate Agreement**
- You will be navigated to the **Noticed Agreement Terminations** page.

Screen

The screenshot displays the CoE PLM Human Settlement Dashboard for a Housing Liaison Officer. The dashboard includes a navigation panel on the left with options like Profile, PLM Applications, Agreements, Agreement Renewal, Communication, Department Tenants, Notice, Inspections, Terminations, and Audit. The 'Terminate Agreement' option under Terminations is highlighted. The main dashboard area shows a 'HUMAN SETTLEMENT DASHBOARD - HOUSING LIAISON OFFICER' with a date and time. It features four large cards at the top: All Applications (53), Master Applications (45), New Applications (8), and Signed Agreements (9). Below these are 'PERSONALIZED DASHBOARD CARDS' showing various metrics like Received, Completed, Renewal Recommendation, Renewal Acceptance, Renewal Documents, Generate Agreement, Agreement Signature, Finalized Agreements, Update Agreement, and Noticed Agreements. The 'Noticed Agreements' card is highlighted with a red box.

Navigation Panel and Dashboard

Navigate



On this screen:

- Click **Terminate Agreement** button on the line item of choice.

- You will be navigated to the respective page.

Screen

NOTICED AGREEMENT TERMINATIONS					
Show 10 ▾ entries			Search:		
Applicant Name ↑	Application Type ↑	Application Reference Number ↑	Application Created Date ↑	Status ↑	Action ↑
ryan poonsamy	Individual Application	HSD2022112300002	2022/11/23	Applicant Vacated The Unit	Terminate Agreement
shevek poonsamy	Individual Application	HSD2023010500004	2023/01/05	In Awaiting Vacating Confirmation	Terminate Agreement
shevek poonsamy	Individual Application	HSD2023010500005	2023/01/05	Property Lease Application Completed	Terminate Agreement
Siyanda Ngxongo	Individual Application	HSD2023020800001	2023/02/08	Property Lease Application Completed	Terminate Agreement
Showing 1 to 4 of 4 entries					Previous 1 Next

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Noticed Agreement Terminations Page



- Under **Evaluating Application** sub-section, you are able to view the following information, such as:
 - Application Details
 - Applicant Details
 - Renewals and Terminations
 - History
 - Documents

Navigate



On this screen:

- The **Notice Date** will be displayed.
- Select the **Termination Date** from the **Calendar**
- Select the **Termination Reason** from the dropdown list, as **Tenant Notice**
- Click **Submit**

Screen

EVALUATING APPLICATION

Show 10 entries

Search:

Applicant Name	Application Type	Application Reference Number	Agreement Created Date	Status	Action
Siyanda Ngxongo	Individual Application	HSD2023020800001	2023/02/08 2:17:50 PM	Active Lease	<button>View</button>

Showing 1 to 1 of 1 entries

Previous

1

Next

Notice Date

2023-03-31

Termination Date

yyyy/mm/dd

*

Termination Reason

-- Select Option --

*

Submit

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Notice Agreement Terminations

EVALUATING APPLICATION

Show 10 entries

Search:

Applicant Name	Application Type	Application Reference Number	Agreement Created Date	Status	Action
Siyanda Ngxongo	Individual Application	HSD2023020800001	2023/02/08 2:17:50 PM	Active Lease	<button>View</button>

Showing 1 to 1 of 1 entries

Previous

1

Next

Notice Date

2023-03-31

Termination Date

2023/03/31

*

Termination Reason

Tenant Notice

*

Submit

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Notice Agreement Terminations

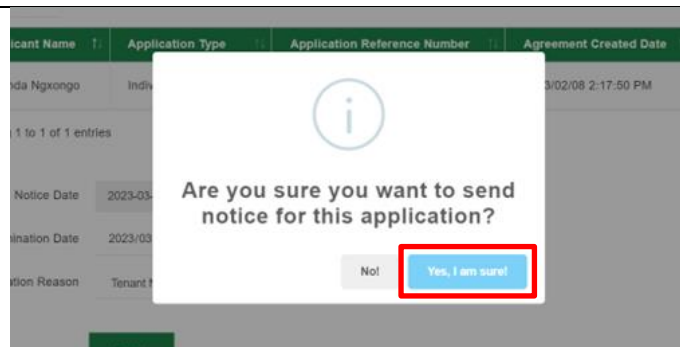
Navigate



On this screen:

- A confirmation popup box will display, **Are you sure you want to send notice for this application?** Click **Yes, I am sure!** to acknowledge.
- You will be navigated to the **Notice Agreement Terminations** page.

Screen



Confirmation Popup

NOTICED AGREEMENT TERMINATIONS					
Show 10 entries			Search:		
Applicant Name	Application Type	Application Reference Number	Application Created Date	Status	Action
ryan poonsamy	Individual Application	HSD2022112300002	2022/11/23	Applicant Vacated The Unit	<button>Terminate Agreement</button>
shevek poonsamy	Individual Application	HSD2023010500004	2023/01/05	In Awaiting Vacating Confirmation	<button>Terminate Agreement</button>
shevek poonsamy	Individual Application	HSD2023010500005	2023/01/05	Property Lease Application Completed	<button>Terminate Agreement</button>
Showing 1 to 3 of 3 entries					Previous 1 Next
© 2023 - PLM v1.0					

Noticed Agreement Terminations Page

You have now successfully completed this sub-section

21 CONDUCT UNIT INSPECTION



After completing this sub-section, you will be able to conduct a unit inspection.



Post Inspections are conducted:

- When a Tenant is Serving Notice
- Under Agreement of Lease Termination.

Navigate



On this screen:

- Click **Post Inspection** on the Dashboard.
- You will be navigated to the **In Awaiting Exit Inspection** page.

OR

- Click **Inspections** dropdown arrow on the navigation panel.
- Click **Post-Inspection**
- You will be navigated to the **In Awaiting Exit Inspection** page.

Screen

The screenshot displays the CoE PLM dashboard. On the left is a navigation panel with a search icon and a list of menu items: PROFILE, PLM APPLICATIONS, AGREEMENTS, AGREEMENT RENEWAL, COMMUNICATION, DEPARTMENT TENANTS, NOTICE, INSPECTIONS, POST-INSPECTION (highlighted with a red box), TERMINATIONS, and AUDIT. The main area shows 'PERSONALIZED DASHBOARD CARDS' with a grid of 11 cards. The bottom-right card, titled 'Post Inspection', shows 17 'Recieved' and 10 'Completed' items, with a 'Post Inspection' count of 7. This card is highlighted with a red box.

Card Title	Recieved	Completed	Additional Info
Renewal Reccomend...	15	13	2
Renewal Acceptance	11	8	3
Renewal Documents	8	8	0
Generate Agreement	12	10	2
Agreement Signature	6	6	0
Finalized Agreements	12	6	6
Update Agreement	4	4	0
Noticed Agreements	14	11	3
Pending Take-Off	9	6	3
Post Inspection	17	10	7

Navigation Panel and Dashboard

Navigate



On this screen:

- Click **Exit Inspection** button on the line item of choice.
- You will be navigated to the respective page.

Screen

IN AWAITING EXIT INSPECTION					
Show 10 entries			Search:		
Applicant Name	Application Type	Application Reference Number	Agreement Created Date	Status	Action
Nicole poonsamy	Individual Application	HSD2023011000001	2023/01/10 3:51:22 PM	In Awaiting Exit Inspection	Exit Inspection
shevek poonsamy	Individual Application	HSD2023010500005	2023/01/05 2:06:05 PM	In Awaiting Exit Inspection	Exit Inspection
shevek poonsamy	Individual Application	HSD2023010600001	2023/01/06 9:21:48 AM	In Awaiting Exit Inspection	Exit Inspection
shevek poonsamy	Individual Application	HSD2023010600002	2023/01/06 9:26:02 AM	In Awaiting Exit Inspection	Exit Inspection
Siyanda Ngxongo	Individual Application	HSD2023010500003	2023/01/05 12:54:04 PM	In Awaiting Exit Inspection	Exit Inspection
Siyanda Ngxongo	Individual Application	HSD2023020800001	2023/02/08 2:17:50 PM	In Awaiting Exit Inspection	Exit Inspection
Showing 1 to 6 of 6 entries					Previous 1 Next

In Awaiting Exit Inspection Page



- Under **Evaluating Application** sub-section, you are able to view the following information, such as:
 - Application Details
 - Applicant Details
 - Renewals and Terminations
 - History
 - Documents

Navigate



On this screen:

- Under **Conduct Exit Inspection Template** sub-section, click on the **Download** button, to download the **Post-Inspection Template**.
- Select the template from your downloaded computer file for viewing and print.

Screen

EVALUATING APPLICATION

Show 10 entries Search:

Applicant Name	Application Type	Application Reference Number	Agreement End Date	Status	Action
Siyanda Ngxongo	Individual Application	HSD2023020800001	2023/03/31 12:00:00 AM	In Awaiting Exit Inspection	View

Showing 1 to 1 of 1 entries Previous 1 Next

CONDUCT EXIT INSPECTION TEMPLATE

Document Type	Link	Description
Post-Inspection Template	Download	Post-Inspection Uploaded On 2022-10-03 13:43:58

UPLOAD COMPLETED EXIT INSPECTION

Document Type	Browse	Document
---------------	--------	----------

Post Inspection

UNIT INSPECTION CHECKLIST.pdf 1 / 1 100% + -





Ekurhuleni
METROPOLITAN MUNICIPALITY

INSPECTION CHECK LIST

FLAT/UNIT NO.: _____

COMPLEX: _____

ITEMS	GOOD/POOR	REMARKS
WALLS		
DOORS & HANDLES		
CURTAIN RAILS		
FLOORS		
PLUGS/SWITCHES/LIGHTS		
TAPS		
GLOBES		
BATH		
HAND BASIN		
KITCHEN SINK		

Post-Inspection Template



After completing the Inspection Check List, it will need to be uploaded and saved on the PLM system.

Navigate



On this screen:

- Click on the **Browse** button.
- Select the necessary document from your computer files.

- Click on the **Open** button.
- The document will be attached. (The document name will reflect next to the browse button)
- Click **Upload** to proceed with the upload.
- A popup notification will display: **Document(s) Uploaded.**
- Click **Ok** to remove popup box.
- The document name will change from black text to blue.
- Repeat the above process to upload an **Additional Document** (Optional).

Screen

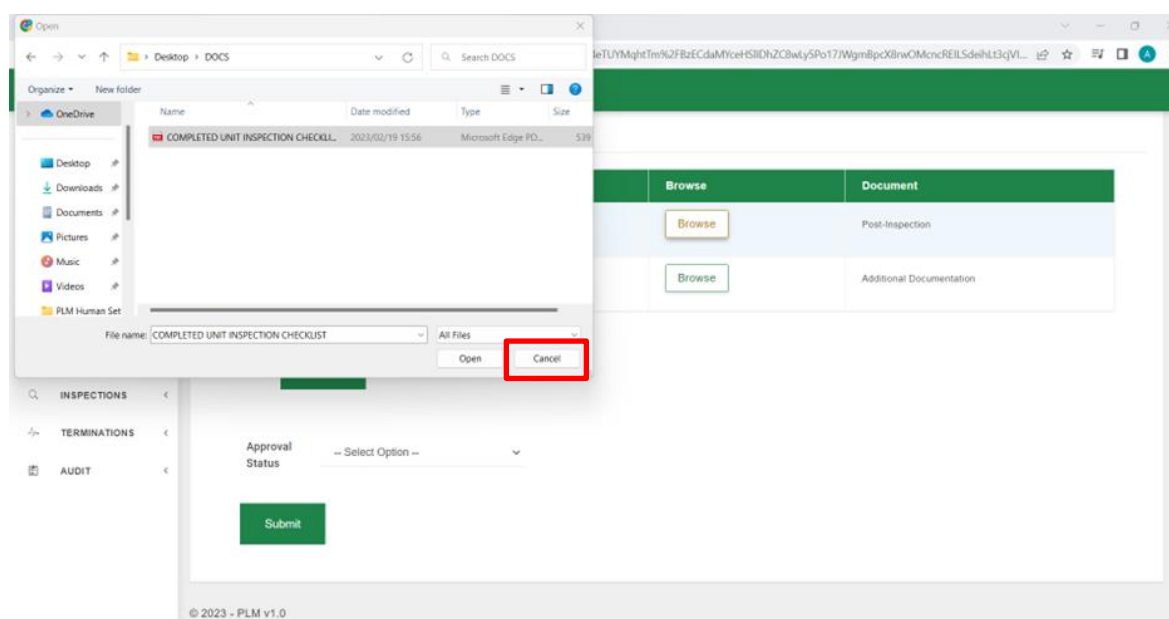
Document Type	Browse	Document
Completed Post-Inspection Document	Browse	Post-Inspection
Additional Document	Browse	Additional Documentation

Upload

Approval Status: -- Select Option --

Submit

Upload Completed Post-Inspection Document



Selecting Document from Computer Files

UPLOAD COMPLETED EXIT INSPECTION

Document Type	Browse	Document
Completed Post-Inspection Document	<input type="button" value="Browse"/>	COMPLETED UNIT INSPECTION CHECKLIST.pdf Post-Inspection
Additional Document	<input type="button" value="Browse"/>	Additional Documentation

Approval Status -- Select Option --

Document Attached

CoE PLM

Progress

Document(s) Uploaded

Progress Popup – Documents Uploaded

UPLOAD COMPLETED EXIT INSPECTION

Document Type	Browse	Document
Completed Post-Inspection Document	<input type="button" value="Browse"/>	COMPLETED UNIT INSPECTION CHECKLIST.pdf Post-Inspection
Additional Document	<input type="button" value="Browse"/>	Additional Documentation

Approval Status -- Select Option --

Uploaded Document



There are 3 types of Inspection Outcomes:

1. Habitable – Minor Defects, meaning maintenance can be conducted while continuing with the leasing process of the unit.
2. Habitable – No Defects, meaning there is no need for maintenance and can continue with the leasing process.
3. Not Habitable, meaning the unit is not suitable for living and maintenance will need to be conducted in the unit it is suitable for the tenant to view again. The application will be In Awaiting Maintenance Job Sheet.

Navigate



On this screen:

- Select **Approval Status** (eg. Habitable – No Defects)
- Click **Submit**
- A confirmation popup box will display, **Are you sure you want to submit the following document approval?**, Click **Yes, I am sure!** to acknowledge.

Screen

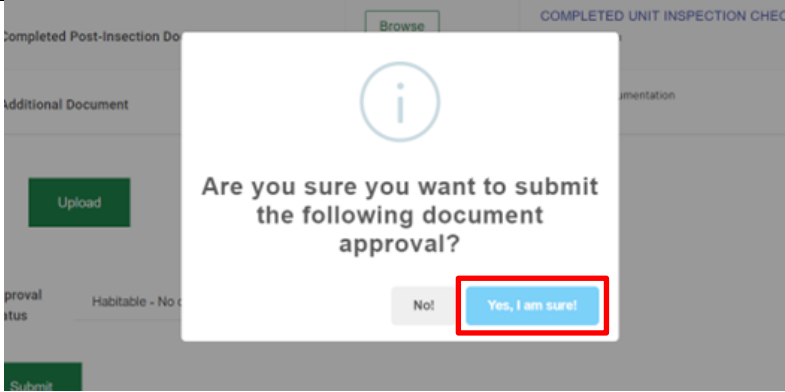

UPLOAD COMPLETED EXIT INSPECTION

Document Type	Browse	Document
Completed Post-Inspection Document	<input type="button" value="Browse"/>	COMPLETED UNIT INSPECTION CHECKLIST.pdf <input type="button" value="x"/> Post-Inspection
Additional Document	<input type="button" value="Browse"/>	Additional Documentation

Approval Status: Habitable - No defects

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Post Inspection

	 <p style="text-align: center;">Confirmation Popup</p>
	<p>Once the Completed Inspection Check List has been submitted, the next step of the Termination process is Pending Take-Off.</p>
<p style="text-align: center;">You have now successfully completed this sub-section</p>	

22 CONDUCT UNIT VACATED INSPECTION



After completing this sub-section, you will be able to conduct a unit vacated inspection.



- Unit Vacated Inspections are conducted when a tenant is serving Notice or under Agreement of Lease Termination.
- You are required to conduct a unit inspection of whether the tenant has vacated the unit or not and log it on the PLM system.

Navigate



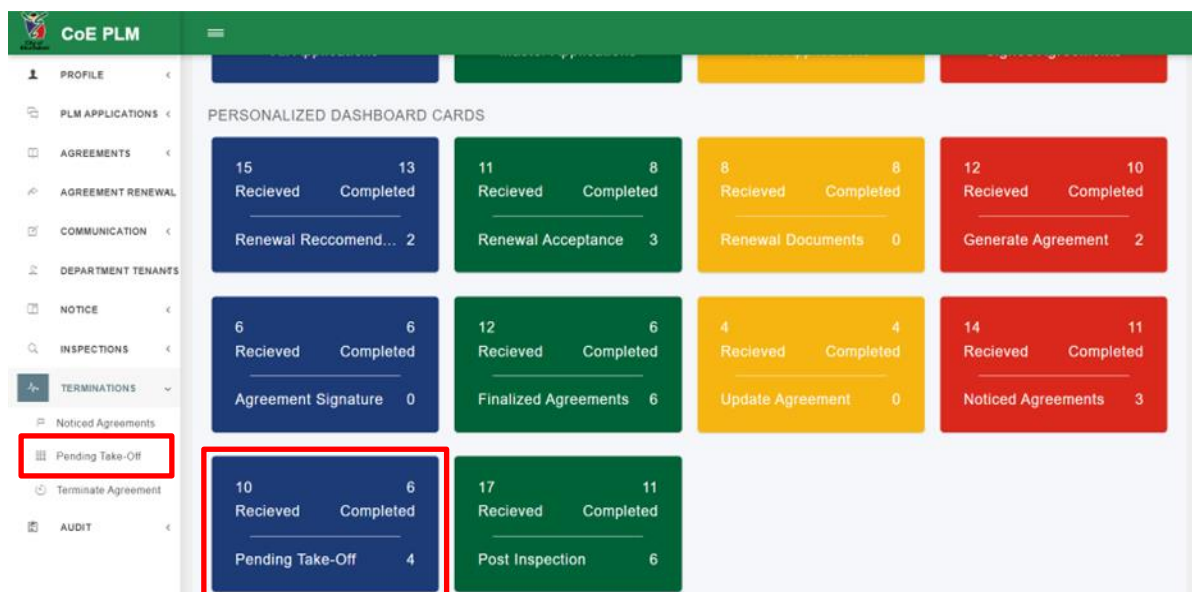
On this screen:

- Click **Pending Take-Off** on the Dashboard.
- You will be navigated to the **Awaiting Take-Off Confirmation** page.


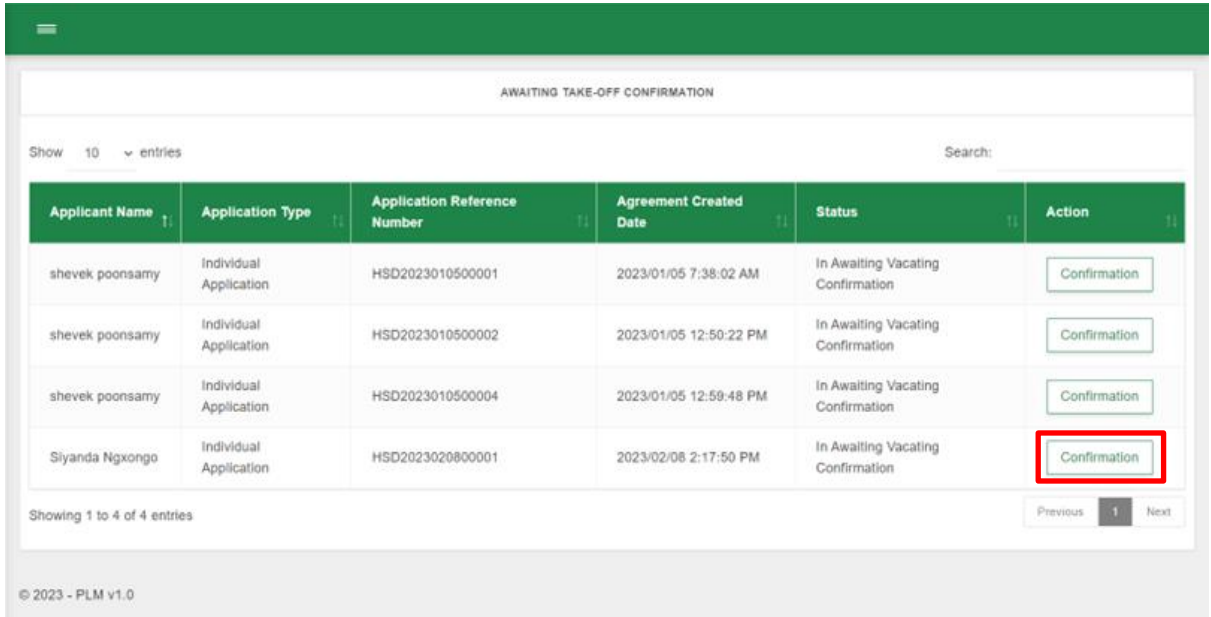


OR

- Click **Terminations** dropdown arrow on the navigation panel.
- Click **Pending Take-Off**
- You will be navigated to the **Awaiting Take-Off Confirmation** page.

Screen



Navigation Panel and Dashboard

Navigate	
	<p>On this screen:</p> <ul style="list-style-type: none"> Click Confirmation button on the line item of choice. You will be navigated to the respective page.
Screen	
 <p style="text-align: center;">Awaiting Take-Off Confirmation Page</p>	
	<ul style="list-style-type: none"> Under Evaluating Application sub-section, you are able to view the following information, such as: <ul style="list-style-type: none"> Application Details Applicant Details Renewals and Terminations History Documents If the tenant has not vacated the premises, they will still be billed.
Navigate	
	<p>On this screen:</p> <ul style="list-style-type: none"> Select Tenant Vacated from the dropdown Click Submit
Screen	

EVALUATING APPLICATION

Show 10 entries

Search:

Applicant Name	Application Type	Application Reference Number	Agreement End Date	Status	Action
Siyanda Nxongo	Individual Application	HSD2023020800001	2023/03/31 12:00:00 AM	In Awaiting Vacating Confirmation	View

Showing 1 to 1 of 1 entries

Previous

1

Next

VACATING APPLICANT ACTION

Tenant

-- Select Option --

Vacated

Submit

Unit Vacated Inspection

Navigate



On this screen:

- A confirmation popup box will display, **Are you sure you want to confirm this applicant vacating?** Click **Yes, I am sure!** to acknowledge.
- You will be navigated to the **Awaiting Take-Off Confirmation** page.

Screen

Applicant Name	Application Type	Application Reference Number	Agreement End Date	Status
Siyanda Nxongo	Individual Application	HSD2023020800001	2023/03/31 12:00:00 AM	In Awaiting Vacating Confirmation

Showing 1 to 1 of 1 entries

VACATING APPLICANT ACTION

Tenant

-- Select Option --

Vacated

Are you sure you want to confirm this applicant vacating?

No!

Yes, I am sure!

Confirmation Popup

ion

AWAITING TAKE-OFF CONFIRMATION

Show 10 entries

Search:

Applicant Name	Application Type	Application Reference Number	Agreement Created Date	Status	Action
shevek poonsamy	Individual Application	HSD2023010500001	2023/01/05 7:38:02 AM	In Awaiting Vacating Confirmation	Confirmation
shevek poonsamy	Individual Application	HSD2023010500002	2023/01/05 12:50:22 PM	In Awaiting Vacating Confirmation	Confirmation
shevek poonsamy	Individual Application	HSD2023010500004	2023/01/05 12:59:48 PM	In Awaiting Vacating Confirmation	Confirmation

Showing 1 to 3 of 3 entries

Previous

1

Next

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Awaiting Take-Off Confirmation Page

You have now successfully completed this sub-section

23 AGREEMENT OF LEASE TERMINATION



After completing this sub-section, you will be able to send a notice for an agreement of lease termination.

Navigate



On this screen:

- Click **Terminations** dropdown arrow on the navigation panel.
- Click **Terminate Agreement**
- You will be navigated to the **Agreement of Lease Termination** page.

Screen



Navigation Panel

Navigate

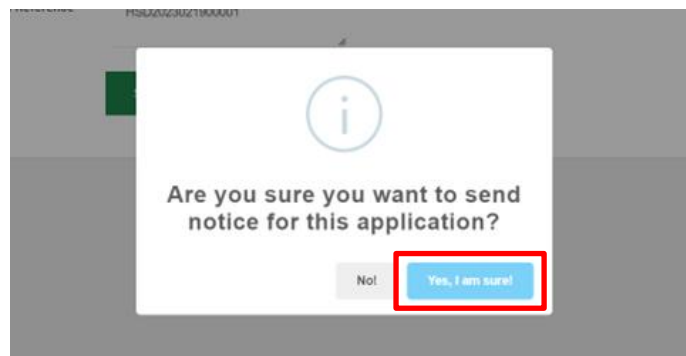


On this screen:

- Input the **Application Reference Number**
- Click **Submit**
- A confirmation popup box will display, **Are you sure you want to send notice for this application?** Click **Yes, I am sure!** to acknowledge.
- You will be navigated to the respective page.

Screen

Application of Lease Termination Page



Confirmation Popup



- Under **Evaluating Application** sub-section, you are able to view the following information, such as:
 - Application Details
 - Applicant Details
 - Renewals and Terminations
 - History
 - Documents

Navigate



On this screen:

- Select the **Termination Date** from the **Calendar**
- Select the **Termination Reason** from the dropdown list
- Click **Submit**

Screen

EVALUATING APPLICATION

Show 10 entries Search:

Applicant Name	Application Type	Application Reference Number	Agreement Created Date	Status	Action
Phumzile Buthelezi	Individual Application	HSD2023021900001	2023/02/19 8:21:22 PM	Active Lease	View

Showing 1 to 1 of 1 entries

Previous 1 Next

Termination Date yyyy/mm/dd

Termination Reason -- Select Option --

Submit

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Agreement to Terminate Lease

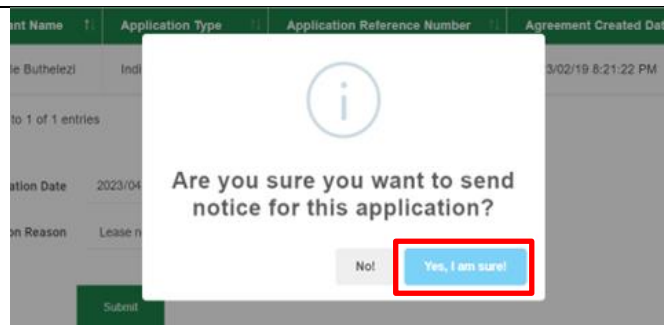
Navigate



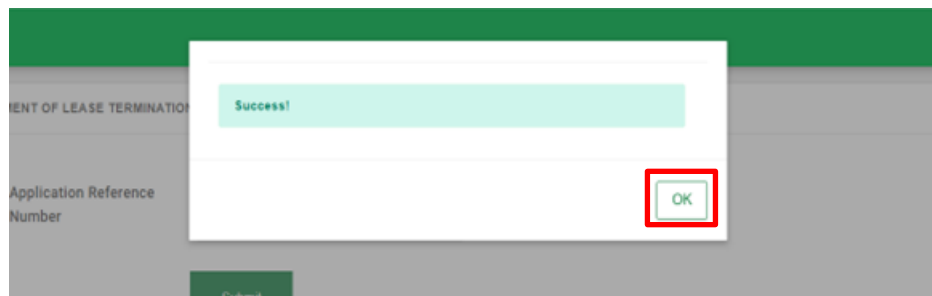
On this screen:

- A confirmation popup box will display, **Are you sure you want to send notice for this application?** Click **Yes, I am sure!** to acknowledge.
- You will be navigated to the **Agreement of Lease Termination** page, with a **Success** notification displayed.
- Click **Ok** to remove popup.

Screen



Confirmation Popup



Success Notification

You have now successfully completed this sub-section

24 SENDING OUT A COMMUNICATION



After completing this sub-section, you will be able to send out communications to tenants.



Communication can be sent to:

- An Individual Tenant
- Per Complex

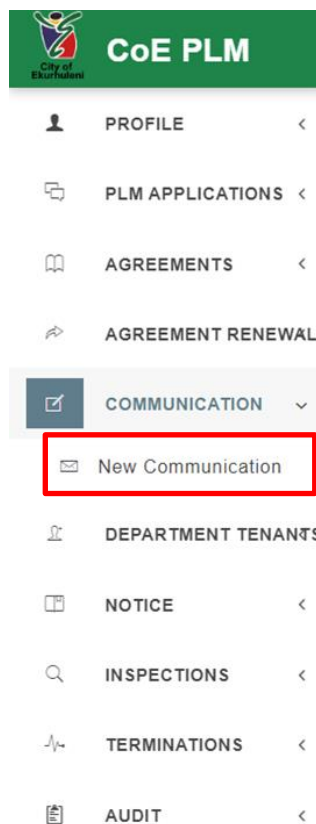
Navigate



On this screen:

- Click **Communications** dropdown arrow on the navigation panel.
- Click **New Communication**
- You will be navigated to the **New Communication** page.

Screen



Navigation Panel



- Clicking on the **Communication Type** radio button enables additional fields to appear.
- **Communication Method** is automatically defaulted with all 3 ticked, however you can select which method of communication you prefer.

Navigate



On this screen:

- Select the **Communication Type** radio button of choice.
- Tick/ Untick **Communication Method**
- Based on the **Communication Type**, you have to select the **To Tenant** name/ **Per Complex** name.
- Capture the **Message Title**
- Capture the **Message Body**
- Click **Send Message**

Screen

New Communication

Send Tenant Communication

Communication Type ☐ Individual ☐ Per Complex

Send Message/s

New Communication Page

New Communication

Send Tenant Communication

Communication Type ☒ Individual ☐ Per Complex

Communication Method ☒ SMS ☒ EMAIL ☒ POSTAL

To Tenant Select Tenant Name *

Message Title *

Message Body *

Send Message/s

New Communication

New Communication

Send Tenant Communication

Communication Type ☒ Individual ☐ Per Complex

Communication Method ☒ SMS ☒ EMAIL ☒ POSTAL

To Tenant Phumzile Buthelezi

Message Title Test

Message Body Test

Send Message/s

New Communication

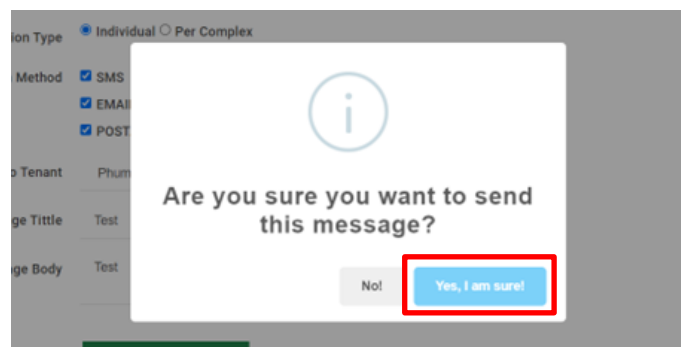
Navigate



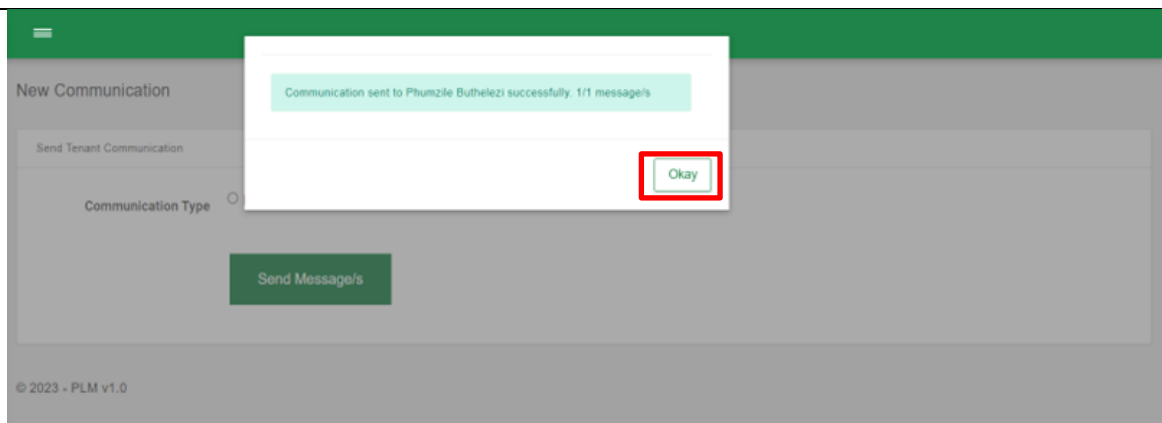
On this screen:

- A confirmation popup box will display, **Are you sure you want to send this message?** Click **Yes, I am sure!** to acknowledge.
- A **Communication Sent** notification will display.
- Click **Ok** to remove popup.

Screen



Confirmation Popup



Communication Sent Notification

You have now successfully completed this sub-section

25 LOG OFF



After completing this sub-section, you will be able to logout of the PLM system.

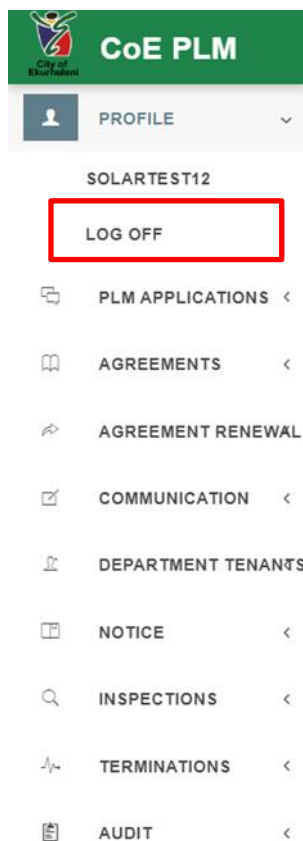
Navigate



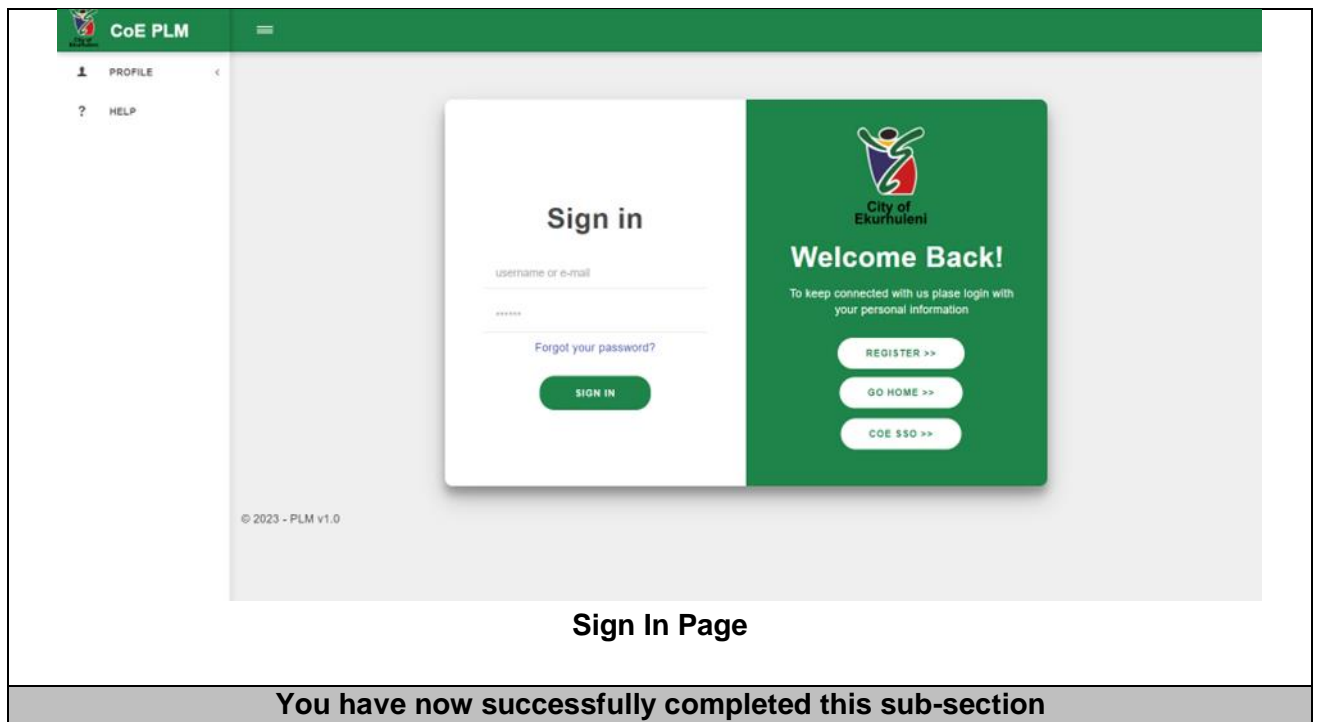
On this screen:

- Click **Profile** dropdown arrow on the navigation panel.
- Click **Log Off**
- You will be navigated to the **Sign In** page.

Screen









Navigation Panel



26 HELPFUL HINTS



- Be able to find useful guidelines throughout the application:

Screen	Navigate
	Clicking on COE PLM, refreshes the current page.
	The navigation bar allows you to expand or compress the left navigation panel.
* Red Asterisks	The Red Asterisks next to a specific field, means that it is mandatory to complete that field.
	The Browse button allows you to search your computer to find the relevant document that you would like to upload.
	The Search functionality enables you to filter the table with the results of what you are looking for.
	The View button allows you to view the attached/generated document.
 USER MANUAL <	Clicking on the User Manual item on the navigation panel, gives to access to view the guidelines of how to navigate the PLM system.

27 ASSESSMENTS OF SPECIFIC LEARNING OUTCOMES

Description of Learning Outcomes		
Were you able to?	Yes Tick ✓	No Tick ✓
LOGIN TO PLM		
SUBMITTING A LEASE APPLICATION FORM		
ADDING AN OCCUPANT TO THE LEASE		
TRANSFERRING A LEASE		
RECOMMENDING FOR LEASE RENEWAL		
ACCEPTING A LEASE RENEWAL		
RENEW LEASE		
GENERATING A LEASE AGREEMENT		
SIGNING AN AGREEMENT OF LEASE		
FINALIZE LEASE AGREEMENT		
TENANT SERVING NOTICE		
NOTICED AGREEMENTS		
CONDUCT UNIT INSPECTION		
CONDUCT UNIT VACATED INSPECTION		
AGREEMENT OF LEASE TERMINATION		
SENDING OUT A COMMUNICATION		
LOG OFF		

28 NEXT STEPS

You will be required to complete the following:

	Training Evaluation
	Assessment



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Published by:
Communications and Brand Management
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