LIA Administration User Guide for Bulk and Manual Allocations

DHA
Defence Housing Australia

1.   Introduction

Defence Housing Australia (DHA) is contracted by Defence to provide an online self-service Living In Accommodation (LIA) Booking and Allocations Service (BAS). This tool enables active management of on-base room requirements whilst supported by a DHA Contact Centre. *The on-line service is available via the DHA website* [Online Services](#) *using any internet connection, it does not rely on the DPN.*

The BAS includes Permanent, Transit, Temporary and Bulk/Course accommodation type requirements and the associated contribution rates for occupancies in accordance with the living-in levels defined in Defence Pay and Conditions Manual (PACMAN).

Some camp accommodation is included in the BAS. This is not managed by DHA and access to camp bookings is restricted to those with Camp accommodation management access.

Non-duty (or non-work related) bookings for Defence members, Defence civilians, Defence employees and non-Defence personnel may attract charges in accordance with the set of rates published in Resource Costing Manual FINMAN 4 3.6 Meals, Messes Accommodation. The collection of these charges is not undertaken by DHA but arranged by the on base Housekeeping Service Provider.

Room allocations requested via the BAS are automated (where possible) as determined by the dates, gender, rank and type of the request and the associated building/room use variables determined within the Base Allocation Rules document. *Base authorities including the Base Services Manager (BSM) and Senior ADF Officer (SADFO) or their agreed representative have determined the allocation rules.*

Various Defence employees and base contractors have specific levels of access to Online Services enabling them to complete specific LIA administrative actions as relevant to their purposes e.g. course room management. *User level of access differs depending on the purpose their access is required and who has access is carefully controlled.*

This document outlines the responsibilities associated to the levels of access including: 'Base Authority', 'Base Management', 'Approving Authority', 'Unit Management' and 'Course Coordinator'.

Why are these different types of access so important?

The actions taken by people with the levels of access covered in this document are a vital component of the booking and allocations functions. Their actions directly enable room occupancy and vacancy activities for base housekeeping along with contribution accuracy.

Often these people hold positions that are relative to delegations outlined in the Defence Pay and Conditions Manual or have a responsibility for decision making to how buildings/rooms are used including prioritisation of use.

Additionally; the benefit of effective use of the BAS by these people provides both the base and the broader Defence community with visibility of its infrastructure for decision making associated to room occupancy levels and base development.

2.   Access and Responsibilities

Defence employees and base contractors can have different levels of access to the DHA Booking and Allocations Service, enabling them to complete specific actions as relevant to their on base accommodation requirements/involvement e.g. course room management, delegation authority or allocating Unit managed lines. *Access is usually for a single base* and 'who' has access is carefully controlled with incumbent/base authorisation only.*

The DHA BAS access levels are reflective of their purpose only; they are not intended to represent actual base or military rank. The 'who' is a guideline as relevant to decision making for LIA purposes or the delegate outlined in PACMAN.

Note: *A person may have more than one level of access assigned for a base or access at multiple bases e.g. course management can be common across bases.*

Level of Access Type	Who	Definition/Responsibilities/Functions provided in BAS
Base Authority	Typically the BSM or SADFO and/or agreed representative	*This person(s) is defined as responsible for the overall strategic management of base accommodation.* It is required that both a military and E&IG representative exist as they are the **co-authorities for the Base's Allocation Rules**. **There is no requirement to take any action for booking or allocating** – however; this access level does provide visibility: • Of all future occupancies and vacancies • Of all buildings/rooms status (infrastructure visibility) • Of all current occupant details - exportable • Of and functionality to take a building off-line or make them on-line
Base Management	Typically the BSM/SADFO agreed representative(s)	*This person(s) is defined as responsible for the operational management of base accommodation.* This person(s) is typically identified on the Base's Allocation Rules document as **holding authority for the dot points below indicating their decision and authority for these responsibilities within the BAS:** • De-conflicting booking priorities • Non-ADF/APS allocations (foreign or domestic) • Determining Reduced Activity Periods/Stand-down and or Exercise/Activity periods to restrict normal allocation rules – *known as Base Activity Periods (BAP) in the BAS* • Cancel/veto requests as relevant to decision making *The 'Unit Managed and/or Approving Authority' level of access may also be assigned if they also have these responsibilities.*

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Approving Authority	Commanding Officer, Officer Commanding or Executive Officer not below MAJ(E) at the base where the member is required to live in or in the member's direct chain of command	*This person(s) is defined as responsible for the CDF delegations in PACMAN as relevant to the unit. Assignment of this level of access is limited to the PACMAN authorised person – as indicated in the 'who' column.* **The BAS enables the person(s) to exercise their delegation by indicating their decision and authority within the system** directly influencing housing for the affected member. This includes: • Evicting a member including revoking a 'Licence to Live In' • Approving allocation for a member who has other suitable accommodation in the posting locality • Determining members as required to live on
Unit Management	Head Resident Unit (HRU) and/or their agreed representative(s) typically the WO or SGT(E) rank	*This person(s) is defined as responsible for the manual allocation of rooms restricted to a specific Unit control/management.* **The BAS allows and limits room allocation to users assigned this level of access for the specific unit, enabling the user to indicate their decision and authority** for: • Making/Amending both <u>Manual and/or Bulk Bookings</u> into designated* 'Unit Managed' or non-unit managed rooms – *Unit Managed rooms are defined as Unit lines and/or specifically used rooms e.g. VIP* • Cancel/veto requests as relevant to decision making • Determine and outline requirements for Unit Managed lines to base management authorities. • Changing rooms where an allocated room is no longer viable (pre or post occupation) **Designated refers to those rooms outlined in the Base Allocation Rules document – they are restricted to a particular unit which may also be the HRU.*
Course Coordinator	For base identified personnel administering course accommodation requirements.	*This person(s) is defined as being responsible for course accommodation and occupation requirements. They may be a course co-ordinator or administrative person for a range of courses a given base.* **The BAS enables this user indicate and manage their course requirements** by: • Making, amending or cancelling bulk bookings for courses in accordance with base allocation rules* • Adding course attendee names to enable contribution management and meet base WHS needs • Auto-allocate Transit for specialists e.g. instructor, special guest **Base allocation rules may dictate course coding that determines specific rooms/buildings for course purposes.*

Camp Accommodation Management	Personnel responsible for managing camp accommodation on a base	Full access for managing camp accommodation (only), limited to the base they are responsible for.

3.   Getting Access and Support

> **The BAS is accessed via Online Services - www.dha.gov.au/online**
> When assigned a level of access an email is sent to you with your username and password.
>
> NOTE: All automated emails from the BAS are sent to your Online Services **username.**
>
> **Is your username a personal email?**
> IMPORTANT: After logging in update your profile to reset it to your work email.

Getting Access - A current incumbent base user should raise an online services enquiry at the end of their tenure to advise DHA of their replacement. *All other requests can be managed via the relevant base authorities.*

The base authority can at any time seek advice from DHA about who currently holds access for their base.

Your Online Services access is now professional – On gaining a level of access for LIA administration on your base and you are an ADF member your spouse/partner may also access to Online Services for your personal housing needs e.g. Service Residences.

*To ensure the security of the information you are privy to as part of the performance of your duties, after logging in, designate your spouse/partner as **a delegate using this available functionality**.*

> The **Housing Contact Centre** operates during
> National business hours 08:30am to 5:00pm Monday to Friday, to provide support to base personnel.
> - **Online enquiry - www.dha.gov.au/online**
> - **Telephone** - 139 342 then select Option 1, then Option 3

Applying for LIA – Personal Transit/Permanent

Online Services provides the option to request your **own personal room requirements** on any base for any person with a Defence employee ID. *It also provides the additional service of **booking a room for someone else.***

How? After logging on to your Online Services account, you select the '**Apply for me'** and/or the **'Apply for Someone Else'** option from the LIA menu – *located at the top of your dashboard screen*.
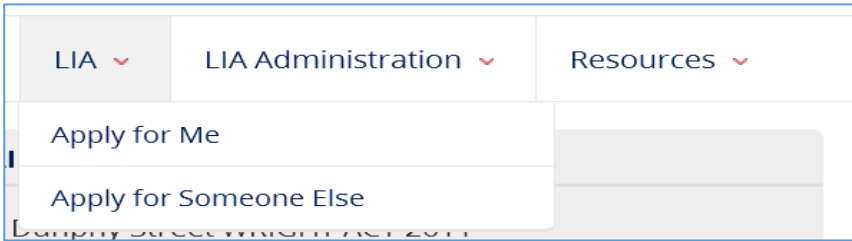
The **'Apply for me'** option:

- is available for Permanent (>6 months), Temporary (22 days to 6 months) and Transit (<21 days) requests
- displays in a box on your dashboard screen
- allows you to cancel or update
- enables for occupancies of 3 months or more the option to opt in for meals

The **'Apply for Someone Else'** option:

- is limited to Transit (<21 days)
- is allowed only if the person you are booking for has an employee id
- displays at the bottom of your dashboard screen under the 'Current Requests' section *(image below)*
- allows you the ability to Update or Cancel
- allows you to use the 'mail icon' if you want a room confirmation email sent to you – *noting it is automatically sent to the person who has the room allocated.*

On booking a room an email is automatically sent to you* and any other person
(*if you select mail icon on screen for someone else bookings)

This confirms room allocation and provides other occupation details for the base

Detailed Base information can be found in the Visitor Base Guides via the DPN

4.   LIA Administration Menus Defined

Different levels of access provide a different range of functions as relevant to purpose/responsibilities for LIA at the base(s) you have been assigned to. *As such, the screens and tabs available will differ.*

All base relevant LIA functions are available under the 'LIA Administration' menu.

The options then displayed are dependent on your level of access they could include:

LIA Administration ⌄

Dashboard

Bulk Booking Report

Create Allocation

Create Bulk Booking

Room Availability

Occupant Search

Base Activity Period

Your Bulk Bookings

Administrator Information

Dashboard

This option opens the dashboard tab for the base. The dashboard tab is one of a range of other tabs. *Refer to the Dashboard Base Tabs section for greater detail about these other tabs.*

The dashboard tab displays 'Individual and Bulk Incoming' i.e. for the current date or those dates in the past where they not yet been checked in, 'Outstanding Issues'. *Clicking on the row will access the 'Allocation Details' screen that may allow you to cancel/veto or modify the allocation or allocate the request.*

Does your work require access to multiple bases?

Typically for course management, you may have responsibility to book course accommodation across more than one (1) base. You may obtain the **Course Coordinator level of access** for each of the relevant bases. *This requires approval from the relevant base authorities and DHA will provide the contact details.*

With multiple base access, after logging in to Online Services and selecting the 'Dashboard' menu option, a field will be available at the top right of your screen.

Entry of the base will provide an option to select for the base you need to create a booking at. *The base displayed in **bold text** by this field will be the dashboard you are viewing.*

HMAS Watson, NSW   Search... ▼

Bulk Booking Report

This option provides users with an alternative way to access the Bulk Booking tab's screen, r*efer to the Dashboard Base Tabs section for greater detail.*

Create Allocation

This option provides all users the ability to book a room for a person with an employee id to be **auto-allocated** to an available room in accordance with the Base Allocation Rules. If a room is not available, it will be identified as an 'Unallocated Request' and will be displayed on the Unallocated Request tab. *Refer to the Dashboard Base Tabs section for greater detail.*

Note: *Who created a booking and how it was allocated (i.e. manual or automatic) is displayed on the Request and Allocation screens. All actions within the BAS are recorded and reported to Defence for audit control purposes.*

Create Bulk Booking

This option provides the functionality to create a bulk booking (bulk bookings are defined as a booking requiring >1 room) – *refer to the Bulk Booking section 18 for details.*

Room Availability

This option provides a search tool using different variables to check room availability to complete a manual allocation or for de-conflicting activities. *Refer to the Manual Allocations section 7 and De-conflicting section 19 for greater details of use.*

Occupant Search

This option provides a search tool to find the status of a particular persons request e.g. has it been allocated, cancelled or currently unallocated. *Hint: Use the 'Show Inactive' box to see cancelled allocations.*

Search Results will provide the following key factors:

- **'Request' – accesses the Request Details screen** – displays the booking parameters, who created the booking and a timestamp. *This screen also allows you to veto/cancel the request or complete a manual allocation.*
- **'Allocation' – accesses the 'Allocation Details' screen** – displays if the room was manual or automatically allocated and who manually allocated with a timestamp with the name and contact number of the occupant. *This screen also allows you to change rooms or cancel/veto the allocation.*
- **Reference** – employee ID (if existing).
- **Type** – Permanent, Transit or Temporary.
- **Status** – if the request/allocation is 'Unallocated', 'Allocated', 'Cancelled' or 'Occupied'.

Base Activity Period (BAP)

This option allows users to view and set a Base Activity period – *refer to the Base Allocation Rules section 5 for details.*

Base activity periods are defined as Reduced Activity Periods (RAP), Stand-Down, Local and National Public holidays, Exercises or other Major Activities which impact and require base accommodation.

A BAP must be set in the BAS to ensure that rooms are not allocated that are either not available or serviced. A failure to set a BAP will require additional workload to manage these allocations.
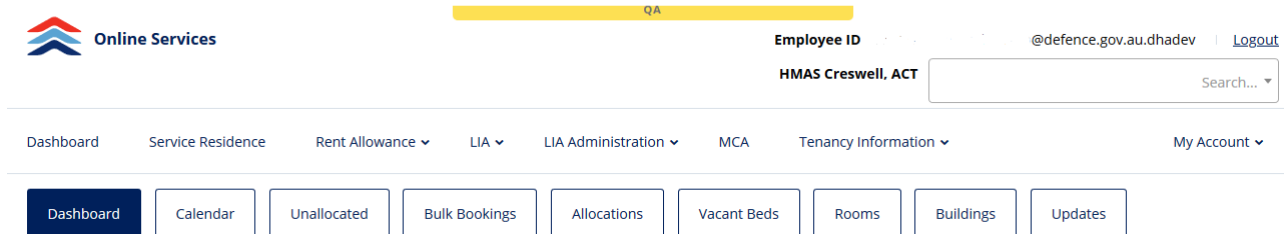
Your Bulk Bookings

This option provides users who manage a group of bulk bookings i.e. courses, a personal dashboard of your bulk bookings. Your bulk bookings are defined as those that you created or are identified as the Point of Contact for.

Administrator Information

This option is a primary resource for all users to access to the Service Provider, Bulk and Manual Allocations and the Exercises and other Major Events – Accommodation Management **User Guides**.

Dashboard Base Tabs

The dashboard menu option from LIA Administration accesses the base tabs at the top of the screen, refer to the table below for the services they offer.

Tab	Displays what?	What do you use it for?
Calendar	Status of buildings and rooms.	• Refer to legend below for the reflective colour for what is Allocated, Occupied, Offline, Vacant, Anonymous etc. Allocated ☐ Occupied ☐ Offline ☐ Vacant ☐ Vacant (Restricted) ☐ Anonymous Allocation ☐ Activity Period • Access the 'Room Details' screen (by clicking on a room/day) to see the available ablutions (male, female, ensuite), future/current allocations, applicable level/rank assigned to the room. On this screen you will also be able to complete manual allocations, taking the room offline or to return it online and identify the restrictions that determine allocation as detailed in the Base Allocation Rules. • Enables de-conflicting decision making. *Hint:* *Hovering on the calendar shows the allocation details.*
Unallocated	Requests not yet allocated	• Identifies requests for managing Unit Managed rooms i.e. unit lines particularly relevant to the Unit Management level of access. *Refer to the Unit Managed section below.* • Identifies where a possible manual allocation requirement may exist – most especially for bulk requests that do not automatically allocate to a room.

Tab	Displays what?	What do you use it for?
Bulk Bookings	All bulk bookings for the base	• Identifying all bulk bookings on the base • Identifies which buildings being used • Enables de-conflicting decision making – *a calendar format for this purpose is also available* • Manage rationing requirements as determined from the booking numbers, dates and attendee numbers. • Identifies where the requested number of rooms has not been allocated to a room(s) (Unallocated) • Identifies where attendees are anonymous or a name exists, (remember to add all attendee details prior to their arrival date).
Allocations	Future occupancies and vacancies	• Primarily this tab provides reporting for key and cleaning planning • Shows incoming and outgoing for up to 30 days – *use function at top of screen to select range.*
Vacant Beds	Vacant room numbers	• Provides vacant beds visibility for forecasting capability at the 'number of' level only.
Rooms	Room status i.e. vacant, offline	• Provides a drop down to view the rooms by building • Identifies basic occupant details and the occupation/vacation dates • Identifies the status of Occupied, Vacant or Offline • To access the 'Room Details' screen – *refer to the calendar row of this table for details* **Note:** *If you filter by a building, the export will only be for that building.*
Buildings	Building status i.e. offline	Access to take building offline.

Export options into Excel/CSV if available will display at the bottom of the screen – clicking the link and following screen prompts will provide a report – noting that CSV may provide a quicker response and can be saved in Excel format.
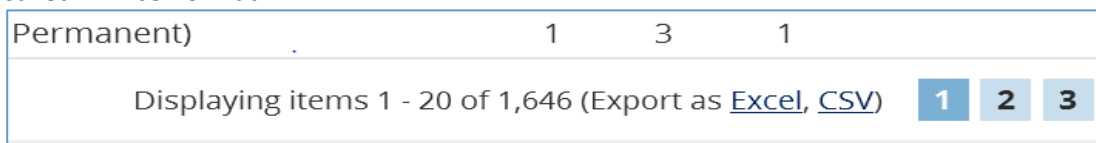
5.   Base Allocation Rules-Controls

> **Only the base users assigned with the Base Authority and/or Base Management level of access co-author and approve the Base Allocation Rules document**
>
> DHA will only make changes in accordance with this requirement.

This document outlines base expectations for room allocations.

This document also details the base personnel responsible for de-conflicting decision making and or responsible for manual allocations i.e. VIP/duty rooms or manage Unit lines.

This document captures the details of the base assets and provides the basis for the restrictions placed on rooms in the BAS that dictate auto and manual allocation capability. *Restrictions include but are not limited to, ablutions, gender, rank, purpose and course coding.*

The document is generally separated into various sections including:

- Permanent allocation rules
- Transit allocation rules
- Non-Resident Bulk Bookings
- Resident Bulk Bookings including courses
- Unit Managed rules
- Emergency room rules

> A copy of the base allocation rules is provided to all users when assigned a level of access in the BAS by DHA.
>
> **This ensures you are aware of base expectations when completing LIA Administrative actions.**
>
> It is the 'Users' responsibility to keep themselves informed of the base allocation rules.

Benefits of Rules? They clearly define base expectations for the use of rooms for all parties. They ensure that all users are aware of both who is responsible for decision making but; if this responsibility is yours. These rules are the best method to explore optimising room use and capturing base infrastructure status.

Base Activity Periods (BAP) – Exercises/Stand-down Defined

Base activity periods are defined as Reduced Activity Periods (RAP), Stand-Down, Local and National Public holidays, Exercises or other Major **Activities which impact and/or require base accommodation**.

> **Warning Message -** When attempting to manually allocate a warning message will display to authorised base users which can be overridden.
>
> **Error Message -** All other users or those applying for LIA via Online Services will get an error message and will not be able to make a booking.
>
> **All messages will display the BAP name and dates.**

Why? A BAP must be set in the BAS to ensure that rooms are not allocated that are either not available or serviced.

Risk - A failure to set a BAP will require additional workload to manage impacted incorrect allocations.

Hint - Early entry of BAPs avoids the need for de-conflicting decisions for existing future allocations.

Public Holidays are a good example of the use for BAP. The BAS automatically accounts for National public holidays, *so only local holidays need a BAP created.*

How do I know a BAP exists? The calendar will display with cross hatching – note image below. The menu option for BAP will also outline all BAPs.
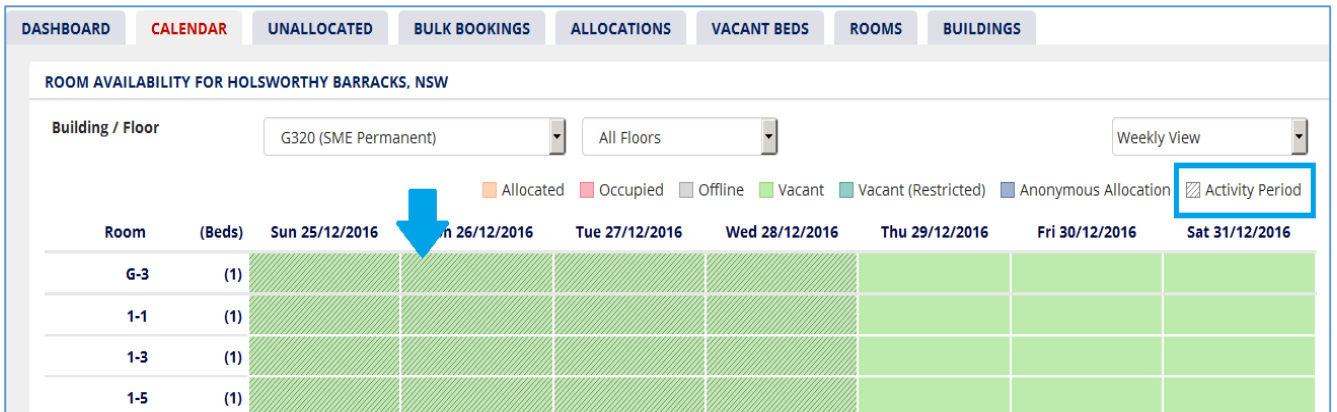
Creating a Base Activity Period (BAP)

To create a BAP, you must understand the different types of activity periods. The type dictates how the BAS will allocate/stop allocations.

BAP Type - Exercise

- Auto-allocations in the BAS will not occur within the defined period *except for requests from Toll Transitions.*
- DHA provides additional resources for you if an exercise is planned. *Refer to the Exercises and other Major Events – Accommodation Management guide under the 'Administrator Information' option.*
- .

BAP Type - Stand-down

- Auto-allocation is treated like any normal weekend i.e. after 2pm of the day before the defined period auto-allocations will not occur *except for requests from Toll Transitions.*

Note: Manual allocations can occur during any BAP type by base users with the Base Authority/Management, Unit Management, Approving Authority access levels, they will however; view a warning message that outlines the BAP name, dates and requires the user to override…. In doing so they are acknowledging the BAP and their continued need for the room *(they will be identified as the person who completed the allocation on the Allocation Details screen, all allocations are recorded in the BAS).*

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8 Steps to setting Base Activity Periods:

Step 1. *Access the Base Activity Period menu option*

Step 2. Check existing BAPs and ensure a BAP for the activity has not already been created

Step 3. If no BAP exists; select the 'Create New' button

Step 4. Enter event name (this will display on BAP screen and messages)

Step 5. Select the 'type' (noting the above impact to allocations)

Step 6. Enter the 'dates'

Step 7. Indicate the POC noting this should be the person who is responsible for decision making related to the activity and or the period.

Step 8. Select 'Save'.

6.   Check In/Out – contributions

The check in and out function is important as it directly impacts room contribution accuracy.

Risk: Bookings without a name means that contribution management cannot occur. It is a Defence requirement (DEFGRAM 347/2020) that attendee details are added prior to arrival. The '**Service Provider' level of access** are responsible for check in and out functionality – this user may be held by a base contractor or a unit who are responsible to 'Check in and out' room occupants. *The 'Service Provider' level of access has its own User Guide available on the 'Administrator Information' Menu Option.*

Base contractors responsible for key issue may contact base management and or the POC identified on the Base Allocation Rules document for check in or out related issues.

Of note; are when a room occupant(s) has **failed to vacate or has not shown up** to collect keys or **names have not been added** to a bulk booking.

Your *assistance may be required with contacting the occupant or determining if the room(s) are still required.*

Base contractors also typically manage housekeeping services where the Unit with the Service Provider level of access often do not. *Housekeeping is an important service to room occupation and vacancy and good communication between different base users is also vital.*

What impact occurs when no-one has shown up to collect keys?

Preparation of rooms and key packs for future allocations are completed in advance of expected occupancy. Keys are also made available in after-hours locations. Where no-one has shown up to collect their room keys, this represents a waste of resources for this contractor. *Importantly it also risks that the room(s) allocated will be cancelled.*

Cause: It is acknowledged that dates and numbers of rooms required will change. The BAS offers base users and ADF/APS access to bookings to modify or cancel their requirements. *Users are encouraged to use this functionality to avoid incorrect cancellations*.

If the cause is due to the check in action not being completed, the person may incorrectly be receiving a system generated email to question where they are and for Permanent rooms they are advised of a Rent Allowance entitlement that may be inaccurate.

Risk: The room allocation will be cancelled*, the room could be allocated to another person and the requirement for the original person remains… *just for a later date*. The base may no longer have rooms available especially where room availability is limited thus; the person will need to seek alternative options

When does a room allocation cancel if no-one has collected keys or if not checked in?

*Room allocation cancellation occurs automatically within the BAS for:

Transit <3 days	Evening of the next working day
Transit 3+ days	Evening of the 3rd day after the start date
Permanent	Evening of the 6th day after the start date

Hint: Use the Occupant Search menu option to view cancelled allocations by ticking the 'Show Inactive' box.

What happens if a person fails to Vacate?

When a room has a vacate date entered against it, the BAS identifies the room as available for allocation to occur after or on the same date. If a person fails to vacate on their expected vacate date they could impact a future allocation into that room.

Cause: It is acknowledged that dates will change, the BAS offers base users and ADF/APS access to modify or cancel dates, if a person has not vacated, this functionality has not been used.

> **Base contractors responsible for housekeeping may contact base management and or the POC identified on the Base Allocation Rules about a failure to vacate.**
>
> Your *assistance may be required with contacting the occupant or determining if the room(s) are still being vacated or to update the end date – the Service Provider level of access does not allow this functionality*

Risk: A future allocation could be impacted (if no other room is available this risk could be significant), the base contractor responsible for housekeeping i.e. with staff prepared to clean the room and or key issue/collection are impacted, users needing to find an alternative room for the incoming booking are impacted.

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7.   Manual Allocations and Unallocated Requests

Booking requests made by ADF/APS using the **Applying for LIA** or **Applying for Someone Else** options on DHA's Online Services normally result in an auto allocation as per Base Allocation rules.

Manual allocations may be required when:

- Base Allocation Rules dictate that rooms cannot be auto allocated e.g. VIP or Unit Managed lines;
- Delegation or de-conflicting decision making is required; or
- A Base Activity Period occupancy or a post 2pm same day occupancy is required.
- No rooms identified for auto-allocation are available and the person has a requirement to live on.

Foreign or non-ADF visitors always require manual allocation by base users with the Base or Unit Management level of access, as they hold the authority for base access and security implications. *These occupants fall outside PACMAN provisions, (see FINMAN 4).*

Visibility of who made an allocation is displayed on the Allocation Details screen (refer to image). *This visibility is especially relevant where delegated authority has been applied.*

ALLOCATION DETAILS		ROOM DETAILS	
Reference	ALC-3655727	Base	Puckapunyal, VIC
Request Type	Transit	Building Name	A0818 (Tobruk Officers Mess Annex)
Allocation Type	Manual	Floor	G
Allocated By	@defence.gov.au	Room Number	1 (VIP)
Expected Start Date	Mon 28/11/2016		
Expected End Date	Fri 2/12/2016		
Emp Id/Reference	8213137		
Name	MAJ John		
Gender	Male		
Contact Phone	0417 54		
Cancelled	No		

How do I know a manual allocation is required by me?

The Base Allocation Rules document typically outlines who has the responsibility for manual allocations, which is determined by base/unit authorities. *Greater details about the Base Allocation Rules document are held in section 5.* Different sources will trigger the need to make a manual allocation – *refer to the 'How do I make a Manual Allocation' section for specific source to action details.*

Permanent Unit Managed Lines: The Base Allocation Rules determines which buildings/rooms and who is responsible for Unit Managed lines.

IMPORTANT: Unit Managed rooms are not rooms that have a designated Unit usage that can be auto-allocated for members belonging to that Unit, Unit Managed are rooms that are restricted to both the designated Unit and under designated Unit Management and therefore must be manually allocated – *refer*

also the Unit Managed section 11 for additional important details. Unless managed well, Unit Managed rooms pose the greatest risk to optimising room occupancy.

How do I make a manual allocation?

A successful manual allocation depends on the source of the request, and understanding which rooms can be allocated in accordance with base requirements and their availability.

Note: Unallocated Bulk Requests are not manually allocated; bulk request allocations should occur via the Bulk Booking Details screen. *Refer to the Bulk Booking section for management of bulk requests.*

Which Rooms to allocate? The Base Allocation Rules document determines which rooms/buildings are designated for use – *noting that rooms with a 'Unit Managed' restriction will require the Unit Management level of access for that 'Unit'.*

Have you just evicted a member from a room to allocate a person who is required to live on? *Refer to the unallocated request row 3 in the table below for manually allocating.*

Requests that are unallocated and required to live on as outlined in PACMAN are identified in the BAS as 'Mandatory' – they may have also been identified as an Outstanding Issue if an allocation has not occurred, *refer to the Outstanding Issues section for greater details about this trigger to action and row 2 of the table below for manually allocating.*

If a room is already allocated and you need that room, the person that has been allocated must be managed first - *refer to the Changing Rooms section 8.*

Complete a Manual Allocation:

Step One - The Source of the Request begins the process:

Row	Source of Request	Action
1	**General phone/email/in person**	Use the **Occupancy Search** function to check for an existing allocation for that person *i.e. a new booking is not required/dates just need modifying.* The **Occupancy Search** will also show if their allocation was cancelled or at Unallocated Request status: • <u>If an Unallocated Request exists</u> – Click on the 'Request' link to allocate an available room *as per row 3 of this table.* • <u>If an Allocation exists and needs to be changed</u> – *refer to the Change Room section 8 for details.* • <u>If no Request exists</u> – Complete a Manual Allocation as per steps below.
2	**Receipt of an Outstanding Issue or Unallocated Request Email**	*You can access the person who needs your decision and action directly by clicking on the link in the email (if you are not logged into DHA Online Services, the login screen will display)*
3	**Outstanding Issue or Unallocated Request from Dashboard/tab**	*Click on the 'reference link' to get to the Request Details screen.* *Available rooms will be displayed and you can use the associated 'Allocate' button.* ***Where no rooms are displayed*** *and you need to complete the allocation - Refer to process steps below using the room availability function.*

Step Two - Find a room (where one is not known else, go to Step Three):

A. Select the 'Room Availability' option from the 'LIA Administration' menu list.
B. Enter the details relevant to the proposed occupant.

> **Hints:** *Transit = (<21 days), Temporary = 22 days to 6 months and Permanent is >6months.*
>
> Rank (enter full spelling, not abbreviations).
>
> Unit will be required for Permanent requests.

C. Select the option to 'Search'.

Search results will display rooms that fit within Base Allocation rules for auto-allocation as per the parameters of your search field entry.

Where no room is available or the room you are wanting are under Unit Managed or other particular restrictions i.e. VIP they will not display and you need to expand your search – *refer to step D.*

D. **This step only applies if needing to view rooms that are not auto-allocated**, select the '*Expand search to rooms that can be manually allocated*'. Search results will now include all available rooms on base including the restrictions that apply to the room to enable your effective decision making.
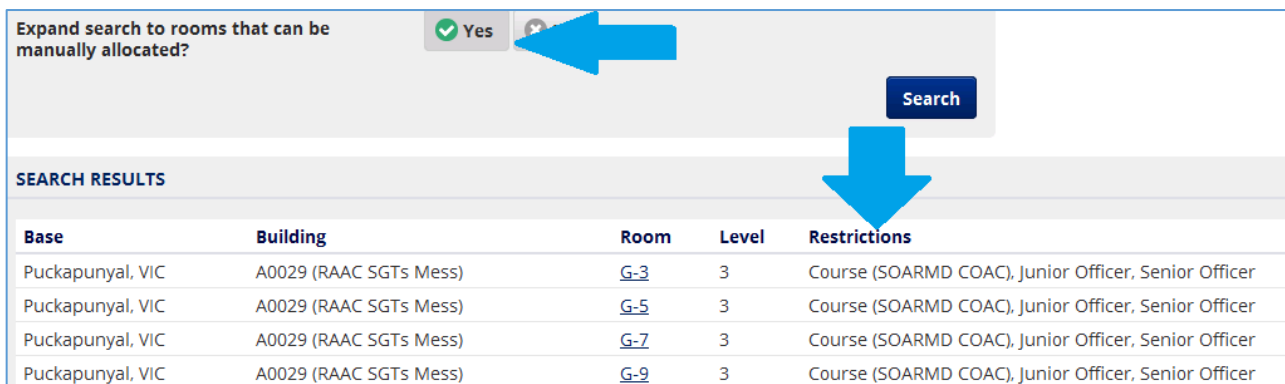
E. To select a room for manual allocation click on the room link e.g. G-3.

Step Three - Found a room, access the Room Details screen to complete the manual allocation:
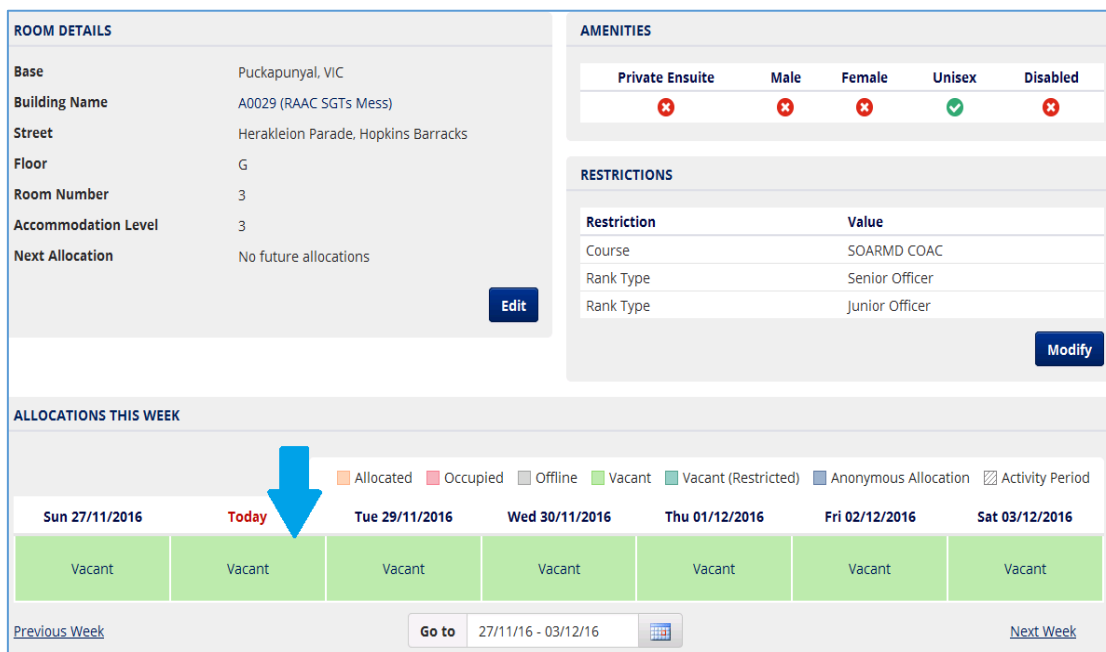
A. If you have not already; access the 'Room Details' screen – *Access may also be sourced from the Calendar or Rooms tab.*

B. On the 'Room Details' screen click anywhere on the coloured calendar row to access the 'Manual Allocation' screen.

C. **Are you allocating an existing unallocated Request?**
   - **If yes;** select the request displayed on the middle of the screen (refer to image below), go to step H.
   - **If no;** refer to step D.

D. At the bottom of the Manual Allocation screen, enter the 'Employee ID' and select 'Search – *refer to image*.

Note: If the person does not have an Employee ID i.e. a foreign officer or other non-ADF, use the Occupant Type drop down to select 'Other' and then select 'Continue'.

E. **If an Employee id was entered,** the screen will prepopulate their name, rank and will know their gender.

F. **If an Employee Id was not entered,** you will need to enter the persons' detail – *note: where the person is a foreign national include the country with and after the First Name and Rank with the Surname.* **Example:** John – USA, Smith – CAPT.

G. Enter the relevant dates, type, reason, unit and categorisation then select 'Confirm'.

Warning messages – may display at this point when completing a manual allocation due to gender, rank, base activity periods or other possible issues that impact your allocation.

Ensure you give due consideration and approval before overriding, noting that visibility of who made that decision is captured within the BAS and in reporting.

8. Changing Rooms

As a base stakeholder you may decide to change an allocated room due to a preference for better quality room, changed needs i.e. period of occupancy, de-conflicting other bookings, suitability or to meet specific unit/gender.

It is important to remember that rooms allocated as part of a bulk booking should be changed within the Bulk Booking itself. *Refer to the Bulk Booking section 18 for details.*

Has the room been occupied? If so; consideration and management for the vacancy also applies as *this has implications for housekeeping and contributions.*

Maximum 4 Steps to Change an Allocated Room:

1. **Find the room occupant -** Access their 'Allocation Details' screen using the 'Occupant Search' function and clicking on the 'Allocation' reference link.

2. Select the 'Change Room' button.

3. **Are you changing a room post occupancy?**
   If no; go to step 4.
   If yes; enter the vacancy details e.g. the end date and reason, then go to step 4.

4. Enter dates
   Select the type of request (*Transit = <21 days, Temporary = 21days to 6 months and Permanent = >6 months*)
   Selecting Permanent requires entry of the Members Unit.
   Select the categorisation – *if in doubt use 'Member Without Dependants'.*
   Type into the building, floor and room fields to view and select the new room.

The Allocation Details screen for the new room allocated will now be displayed, and an email will also be sent to the person (if they have an Employee ID).

9.   Cancelling/Modifying a Room Allocation/Request

Cancelling Requests and Allocations:

You may need to cancel a 'Request' for a room so the person is not allocated any room on base, or **just cancel an undesired room 'Allocation' i.e. the room is required for another purpose.**

Taking cancel action is typically part of de-conflicting activities when prioritising room usage or to make rooms available – *refer to section 19 for details.*

Bulk Requests should be cancelled via the Bulk Details screen – *refer to the Bulk Bookings section 18.*

Cancelling a Request vs an Allocation has a different result in the BAS:

After you cancel an Allocation	• **The room Request will automatically be re-allocated** to another available room. • **If a room cannot be allocated**, the Request will appear under the 'Unallocated Request' tab until a room becomes available or the Nil LIA timeline is triggered – *refer to the Nil LIA Timeline section 10 for details.*
After you cancel a Request	• **The Room Request will be removed altogether** from the system incurring a nil LIA result to the person. • **A Request cancellation email** will be sent to the person, advising to seek an alternative solution. • **Note:** A Request cannot be cancelled post occupation.

To cancel a non-bulk Request:

1. Access the Request/Allocation Details screen by using the 'Occupant Search' function and click on the Request link. *The Request Details screen can also be accessed from an Outstanding Issue email, the Un-allocated tab on the base dashboard or via any reference link indicating 'REQ'.*

2. Select the 'Cancel' or 'Cancel Request' (if on the Allocation Details screen – refer to image below) button.

To cancel a non-bulk Allocation:

1. As per image provided for cancelling a request, access the Allocation Details screen by using the 'Occupant Search' function and click on the Allocation link. *The Allocation Details screen can also be accessed from the base Dashboard or the Calendar tab.*

2. Select 'Cancel Allocation' option.

Modifying an Allocation:

Modifying a booking may be as result of a base stakeholder or member request usually related to where the stakeholder or member cannot take this action themselves in Online Services. *De-conflicting decision making event may cause or be a result of modifying a booking.*

To modify a booking

Access the Allocation Details screen and use the 'Modify Allocation' button – refer to table below.

Scenario	Action
If you are changing the start date of a booking	An on screen message will advise that the current room allocation will be cancelled with a new allocation to be made – *you will need to accept this limitation before proceeding – noting the same room may not be allocated.*
If you are changing the end date of a booking AND the occupant has already been checked in	The system will attempt to allocate into the same room and where the room cannot meet the new end date an onscreen message will display. *You will need to decide if the person can occupy another room for the extended period or if the same room must continue to be occupied.* Decision Making action: View the room calendar to determine why the room cannot be extended i.e. *offline or future allocation?* You can either: • Modify the end date to extend the person up until the future allocation needs to occupy (*where the future allocation has priority)* and/or • Use the 'Change Room' function to move the person into another room to enable the future allocation to occupy or • Use the Cancel Allocation function against the future allocation for them to be auto-allocated into another available room (*noting room availability and bulk limitations)*
If you are changing the end date of a booking AND the occupant has not been checked in	The system will attempt to allocate into the same room and where the room cannot meet the new end date an alternative room will be allocated. If no other room is available within Base Allocation Rules – an onscreen message will display. *Decision making activity as per above row will be needed.*

10. Nil LIA Timeline

When a Request Start Date falls within the Nil LIA timeframe and a room is not allocated a nil LIA notification is the result. The Nil LIA timeline differs depending on the source of the request.

If a nil LIA outcome has occurred consideration to changing dates should be given or contact DHA for support on 139342.

Risk – If a Request is for a member who is required to live on (they are identified in the BAS as Mandatory), and the Nil LIA timeline triggers - **they will be incorrectly advised of a nil LIA result and that they should seek an alternative accommodation** i.e. Rent Allowance.

Risk Mitigation - All '**Unallocated Requests**' for Permanent room requirements have an email sent to Base Users with the Unit Management level of access for the designated Unit to trigger attention. This also allows the Unit Managed Lines process – *refer to the Unit Managed section 11 for details.*

Note: An email is not sent to any base user for transit requests as they are not associated with a unit.

Unallocated Requests for a Permanent Mandatory Request is further risk mitigated by being identified as an '**Outstanding Issue'.** *Refer to the Outstanding Issue section 13 for details.*

Nil LIA Timelines by Request Source

Request Source	Nil LIA Timeline triggered	Outcome
Toll (permanent LIA request)	10 days before the member departs their losing location	*Email is automatically sent to member advising nil LIA and a Rent Allowance entitlement.*
Toll (transit LIA request)	12 days before the member departs their losing location.	DHA notify Toll who manage an alternative commercial arrangement and inform the member
Non-Toll transit and permanent	5 days before the request's expected start date.	*Email is automatically sent to member advising nil LIA and to seek alternative arrangements*
Bulk Bookings	5 days after the latest expected start date if no attendee is checked in	Whole Bulk booking cancels **Note:** Booking will not cancel if at least one attendee is checked in.

11. Unit Managed Rooms

Base Allocation Rules may determine that particular building/rooms have allocation decision making and control under a particular unit/base management – *often related to permanent lines or VIP rooms. Refer to the Base Allocation Rules section 5 for greater details.*

Unit v's Unit Managed restrictions - Rooms can have a designated 'Unit' identified that allows auto-allocation for only that Unit. Rooms can also be designated for use by a particular Unit but; also have a *'Unit Managed' restriction that stops the auto-allocation* and dictates unit/base manual allocation requirement.

Members may require a room as part of their relocation on posting or through choice or as part of their employment training – they may log on to DHA Online Services to make a Request or a Request may come from Toll Transitions – If their Unit is under Unit Managed rooms their Request will not be auto-allocated and will sit in Unallocated Requests until manually allocated or the nil LIA timeline triggers.

Unallocated Request emails are sent to base users with the 'Unit Management' level of access assigned for the 'Unit' associated with the unallocated permanent request.

Email receipt should trigger activity by the responsible person to approve and allocate a room.

> **To allocate into 'Unit Managed' restricted rooms you must have the 'Unit Management' role for the Unit name assigned to the room.**
>
> *Refer to the Manual Allocation section 7 to action.*

Risk – If room allocation isn't actioned **prior to the Nil LIA Timeline**, the 'RA Approval' email will be incorrectly sent to members by the BAS for members **that may actually be required to live on base**. *Refer to the nil LIA section 10 for details.*

If a member contacts DHA as a result of the incorrectly sent email, DHA will refer the member to the base user with the Unit Management level of access to manually allocate a room or confirm they should seek an alternative housing solution.

Non-Permanent Unit Managed Rooms i.e. VIP rooms

VIP rooms are often under base/unit controlled allocation. This control is achieved via the Unit Managed restriction. The Base user identified in the Base Allocation Rules as being responsible for VIP room allocation must have the Unit Management level of access for the 'Unit' that is identified against the Unit Managed restriction.   The 'Unit' will usually be the Head Resident Unit for the base.

Transit Requests do not have a 'Unit' association hence an Unallocated Request email is not sent for unallocated transit Requests.

The trigger to action for VIP room occupancy is usually by direct request from the person/aid or DHA, which is completed by the POC from the Base Allocation Rules via the Manual Allocation process. All allocations display who made the allocation and is captured in reporting. *Refer to the Manual Allocation section 7 for details*.

12. Evictions

The **Approving Authority level of access only** has the delegated responsibility for evictions in accordance with PACMAN. PACMAN identifies the Approving Authority delegates as the Commanding Officer, Officer Commanding or Executive Officer not below MAJ(E) at the base where the member is required to live in or in the member's direct chain of command.

Why evict? Primarily, evictions are undertaken to provide rooms for members required to live on base and after completing an eviction you may need to take further action to allocate an unallocated mandatory member – after completing your eviction steps below, *refer to the manual allocation section 7 for details*. Your requirement to take action may have been triggered by receipt of an Outstanding Issue email – *refer to section 13 for details.*

Risk – Evictions hold a delegated responsibility for a reason, selection of the reason for eviction directly influences Commonwealth funds for removal and ongoing housing entitlements for the member.

PACMAN Delegation Enabled:
- When evicting, drop down reason options will display the relevant PACMAN references *for selection and one other* (refer to image below).

- Be mindful that if revoking the 'Licence to Live In' – the member loses eligibility for all subsidised housing support in their posting locality.

- <u>Removal Entitlement</u> - Most of the reasons have an associated removal entitlement however; if a member is just seeking approval to live off base or they have lost their 'Licence to Live in', ensure you select the appropriate reason that indicates no removal entitlement.
- <u>An Eviction email is automatically sent to the member</u> and informs of their requirement to vacate with the reason you selected, it outlines a removal entitlement (if applicable) and to contact Toll Transitions - it also outlines their eligibility for Rent Allowance and how to apply.

What steps should be taken to evict a member?

Step One - Identify the member to be evicted:

If you know which member is being evicted	• Simply use the 'Occupant Search' menu option to access the Allocation Details Screen – *refer to the LIA Administration Menu Options section 1 for details.*
If you don't know which member to evict	• Access the 'Rooms' tab, select the building from the drop down options to view the members of your Unit that occupy rooms. • Once you have decided, you can then click on the row for the room to access the Room Details screen. The members details should be displayed within the 'red' colored section of the calendar at the bottom of the screen - click on the calendar.

Step Two - Evict the member:

Select the 'Evict Occupant' button and then

Select the reason using the drop down options and

Select a date which they must vacate the room. **Note:** *The date should allow time for a removal to occur where applicable (at least 28 days is recommended).*

ALLOCATION DETAILS	
Reference	ALC-3132834
Request Type	Permanent
Allocation Type	Automatic
Expected Start Date	Fri 8/01/2016
Actual Start Date	Fri 8/01/2016
Expected End Date	
Emp Id/Reference	8261
Name	SGT Sco
Gender	Male
Contact Phone	0438 2!
Unit	1SECFOR [RICH]
Cancelled	No

View Request   Evict Occupant

Once a member has been evicted from a room, the system **allows the user 1 hour to re-allocate** the room before it becomes available for other requests. – *refer to the Manual Allocation section 7 for action.*

13. Outstanding Issues

Outstanding Issues are a particular status within the BAS that identifies a Request as needing immediate/authorised attention by a base/Unit user. They are defined as:

- Requests that require an approval/delegation decision* *i.e. Mandatory or where they have other suitable accommodation in locality*, or
- Occupations where the APS/ADF member has failed to vacate their room putting future allocations at risk.

*The **Approving Authority level of access** has the delegated responsibility in accordance with PACMAN. PACMAN identifies Approving Authority delegate as the <u>Commanding Officer, Officer Commanding or Executive Officer not below MAJ(E)</u> at the base where the member is required to live in or in the member's direct chain of command.

Risk – The BAS **will not auto-allocate a member who has other suitable accommodation** in the posting locality, *the delegate must make a decision.* If a decision is not made the Request will not be allocated and the nil LIA timeline will trigger. **If a room is simply not available for the member who is required to live** in i.e. Mandatory, the nil LIA timeline will also trigger and the member will incorrectly be advised to seek alternative accommodation. *A Delegate decision must be made* for the member required to live in e.g. do you need to evict another member in your Unit?

If your decision is to 'not allow' allocation - *use the 'Cancel' button on the Request Details screen to cancel the request, and the member will receive a nil LIA notification via email.*

The 'Failure to Vacate' cause is outlined in greater details under the *Check in/Out Section 6.*

How do you know if an Outstanding Issue needs your attention?

An Outstanding Issue email is sent to the person(s) holding the 'Approving Authority' level of access for the associated Unit to trigger their decision making and manual allocation action within the BAS. *Refer to the Manual Allocation section 7 for how to allocate which captures your decision/authority.*

You can directly access DHA Online Services via the email using the links provided. If you are not logged in, you will be taken to the Login screen – *if necessary refer to the Getting Access section 3 for details regarding log in.*

Visibility of all Outstanding Issues always exists via the base Dashboard and a yellow banner displays at the top of the screen after you have logged into DHA Online Services.

14. Room/Building Offline

The base calendar uses grey colouring to indicate an offline status.

| Allocated | Occupied | Offline | Vacant | Vacant (Restricted) | Anonymous Allocation | Activity Period |

A room may be taken offline by the **Service Provider** level of access due to:

- Cleaning or unfit for occupation due to hygiene or safety reasons
- Planned or emergency maintenance
- Non-return of the room key and room cannot be occupied
- Failure to vacate - *This reason should initially be set for 1 week with any extensions managed closely by the Service Provider, keeping Base Management informed.*

The **Base Authority/Management** level of access may also take rooms or buildings offline (*refer to instructions below*) for a range of reasons including the following:

- Decommissioning – *old building going offline and can no longer be allocated*
- New Building – *new building coming online soon not yet ready for allocation*
- Renovation/Upgrade – *allocation cannot occur during period*.
- Building Unsuitable – *unplanned maintenance required*
- Stand-down – *prior to using this option contact DHA on 139342.*
- Common Room; Office or Storage – *where new Base Allocation Rules determine this purpose.*

Risk – Future allocations may be impacted and may fall into an unallocated status and the person may ultimately be advised that of a nil LIA outcome. *Consideration of future allocations is recommended before/when taking rooms/buildings offline.*

What happens to future allocations if the room/building goes offline?

A future allocation means the proposed occupant has not yet collected keys to check in, if the room they are allocated to is no longer available i.e. offline, the Request will be automatically removed from the room and an alternative available room is allocated.

Where another room is not available the request will go to Unallocated Requests to await an available room for auto-allocation.

Risk – Future allocations that are part of a Bulk Booking will not automatically find another room, they must be manually allocated via the Bulk Booking Details Screen – *refer to the Bulk Booking section 18 for details.* When taking a room/building offline you must view future allocations.

How are current occupants affected by a room/building being taken offline?

A room or building going offline may impact a current room occupant or not depending on the dates of the offline period and the purpose. The purpose may be for an event in the future that can wait for when rooms are **naturally vacated or may require a forced vacation** of current occupants.

When taking a room or building offline; if the period encompasses existing room occupants – the system does not cancel their occupation nor is a vacate date added to their room to trigger vacancy processes. If a forced

vacation is required, this must be managed manually by the base authorities via the eviction or change room processes. *Refer to the Eviction section 12 or Change Room section 8 for details.*

Managing an offline Building/Room

When taking a room/building offline, the 'Offline End Date' entry is optional *but; entry of one is highly recommended.*
The length of time a room/building is offline depends on the purpose e.g. maintenance or cleaning. When necessary, the end date can and should be modified *as the room can be allocated for occupation the next working day after the offline end date.*

Risk: No end date entered means the room cannot be allocated and all future allocations will be impacted

How do I take a room/building offline?

Step one – check for future and existing occupants (as relevant)

A. **Find the room** via the 'Base Calendar' tab filter as necessary and click on the room to access the 'Room Details' screen then refer to step 2. **Buildings** refer to step B.

B. **Find the building** via the 'Buildings' tab filter as necessary (note this screen will display all buildings and their offline status too). Click on the building name to access the 'Building Details' screen.

C. **Check for current and future allocation(s)** particularly for same day occupancies and bulk request types to make any relevant decision relating to the offline purpose.

*Hints**: If taking a building offline you can right click your mouse on the 'View Calendar' option to display the calendar for the building in a different tab. Additionally; hovering on the calendar will quickly identify if a bulk request is impacted - the bulk booking name will display if the room occupant is not yet known or name has not yet been added.*

a. On either the room or building calendars click on the coloured row to view the 'Room Details' screen to see the 'Next Allocation' and date… **if a bulk request or current date refer to step b** else; refer to step two.

b. **Taking action for bulk requests** requires accessing the Bulk Booking to allocate another room – *refer to the bulk booking section 18 for details*. Whilst a future allocation may auto-allocate if necessary i.e. **if the allocation is due to occur on the current day**, you need to manually allocate another room – *refer also to the manual allocation section 7 for details*.
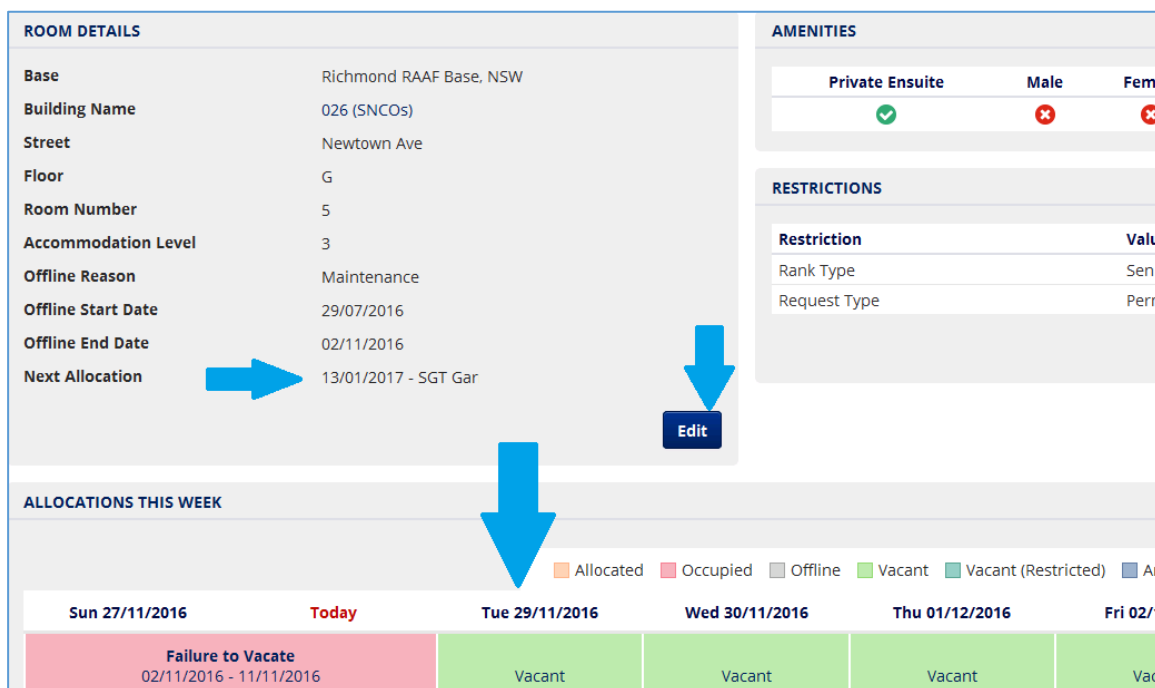
Step Two: Take the Room/Building offline

Select 'Edit' on the Room/Building Details screen and enter the requested information. Remember the Offline End Date is optional but highly recommended.

A warning message will display if any future allocation is impacted – select confirm to continue with the offline process.

15. Back to Back/Weekend Allocations

Back to back room allocations on weekdays

The BAS **will allow** back to back allocations into a room on weekdays, as key and room cleaning preparations should be turned around on the same day.

If cleaning cannot be completed, the Service Provider, Base or Unit Management level of access may take a room offline – *refer to the Room Offline section 14 for the process.*

Back to back allocation on weekends or public holidays

The BAS **will not allow** room allocations on weekends or public holidays from 2pm of the day before the period starts.

Note - The Base and Unit Management level of access and DHA staff can make manual back to back allocations if required. *These users will view a warning message, and should confirm with the Service Provider base contractor for housekeeping before manually allocating.*

Risk - If a back to back booking is identified and **no agreed arrangements for weekend cleaning** have been confirmed, the Service Provider base contractor for housekeeping may contact Base management to discuss. The person with the Base/Unit Management level of access may need to cancel the Request, *refer to the Cancelling/Modifying Room Allocations/Requests section 9 for details.*

16. Short Notice Changes

Dates of a booking could be changed or cancelled at any time by users with the Base or Unit Management level of access**,** course coordinators, by members or DHA staff.

Risk - A room may not be clean or have key packs prepared if the change or cancellation is not known. *Whilst Base contractors or Units with the Service Provider level of access have visibility of these changes via the 'Updates' tab, it is highly recommended that contact is made with the base staff responsible for key issue and room cleaning when making a short notice change especially related to same or next day activities.*

17. Room Contributions and Meals

The Check In and Check Out actions taken as per details outlined in section 6, are the key drivers for contributions as defined in PACMAN. Timely action is important to avoid member debt or over-payment. *The Defence form (AD293) is no longer used for room contributions.*

Live in Meal (LIM) Contributions Permanent/Temporary occupancies

A member allocated a room for three months or more can elect/Opt in to commence fortnightly LIM contributions in DHA Online Services using the 'Apply for Living In Meals' button. *This removes the need for base staff to complete the AD293 for LIM.*

DHA will commence and then cease LIM in accordance with the room occupancy and vacancy – *any adjustment/cancellation during tenancy is not managed by DHA.*

Bulk/Group Meals/Rationing

Members attending courses or bulk/group occupancies of 3 months or more can also opt in to LIM contributions as per the above.

Short term occupancies and large group rationing does not have this option. The 'Bulk Booking' tab/report provides visibility to base contractors for rationing and meal considerations.

Leave With-Out Pay (LWOP)

Members occupying a room while on LWOP no longer fall under DHA management for contributions. *Approval for continued room occupancy and collection of any charges in accordance with FINMAN 4 are managed by the Service Provider/Base management.*

Change of Categorisation

Members are required to ensure their personal circumstances are kept up to date, their room contributions or eligibility for continued room occupancy may be impacted. *The member should be advised to contact DHA immediately if a change of categorisation occurs during occupancy.*

Defence Civilians & Reservists

Defence civilians and reservists with Employee IDs can book transit rooms via DHA Online Services using the Apply for me or Apply for Someone Else options (*refer to the Getting Access and Support section 3 for details how*). *Collection of any charges in accordance with FINMAN 4 are managed by the Service Provider/Base management.*
APS may also be manually allocated refer to section 7 by base users.

Foreign Nationals and Non-ADF bookings

Base Management has the responsibility for making room allocations for these proposed occupants. This responsibility is due to associated security and base access implications. *Refer to the manual allocation section 7 for details. Collection of any charges in accordance with FINMAN 4 are managed by the Service Provider/Base management.*
If the occupancy relates to a bulk booking, the same responsibility and reasoning applies and base users should ensure they have approval for these types of occupancies.

Note: As outlined in the Manual Allocation section 7, entry of the country of origin and rank is required next to the surname and given names. This must be updated prior to check-in.

Mess Fees

Mess fees are not managed by DHA. Questions relating to mess fees should directed directly to the relevant base.

Non-duty bookings

Online Services allows an APS/ADF members to book a transit room for non-duty purposes.

Risk - The declaration of 'non-duty' use is a member responsibility – it is not audited by DHA.

DHA does not collect public monies payable for occupying LIA for non-duty reasons. *Collection of any charges in accordance with FINMAN 4 are managed by the Service Provider/Base management.*

Visibility of 'Non-Duty' bookings *are on the export available on the 'Allocation' Tab under the 'Reason' heading (where this reason was declared).*

18. Bulk Bookings

Bulk bookings may be for Resident or Non-Resident purposes; these are defined as:

* **Resident** - refers to regular course or base specific activities including Cadets and
* **Non-resident** - refers to more random and ranging circumstances including but, not limited to: Sporting events, conferences or exercises which may or may not be required by base/unit resident sources e.g. external parties may wish to use rooms on base including DACC tasking.

Non-Resident requirements are most often the cause of de-conflicting decision making noting that resident purposes should always take priority.

Foreign or non-ADF visitors fall outside PACMAN provisions, and have base security/access implications. *Refer to Room Contributions and Meals section 17 for details relating to responsibilities for allocations including capturing the country of origin and rank.*

To create and manage everything for a bulk booking you must have the Unit Management, Course Coordinator or Camp Accommodation Management level of access, you have a responsibility to determine the number of rooms required and allocate those rooms in accordance with the Base Allocation Rules – *refer to section 5 for details.*

You also have a responsibility to add the names of the room occupants prior to arrival for room contribution management and base visibility and where relevant you must modify or cancel the booking or attendees to ensure that housekeeping and effective optimisation of room occupancy can be achieved. This is all managed on the Bulk Booking Details screen – *refer to the visibility and finding Bulk Bookings section below.*

You may also need to allocate buildings/rooms or select alternative options due to:
* de-conflicting decisions *as per section 19*
* results of taking a building/room offline *as per section 14*
* Other bookings may need to or have extended their room requirements
* A single building couldn't be auto-allocated
* Rank, Gender or Age restrictions

If rooms/buildings were allocated and became unallocated an email is triggered to the booking POC if they remain unallocated by COB.

Refer to the Selecting/Changing rooms and buildings sections below – DHA do not monitor unallocated requests.

When do I create a bulk booking?

Creating a 'shell' booking as early as possible provides visibility of the room requirements to inform supply and demand and prioritisation decision making by Base management if necessary. **Course** bookings should be made up to 12 months. This will ensure that subsequent booking allocation requests have little to no impact.

> **Updating** the 'shell' booking as soon as the details or **changes** to those details (Attendee numbers, names and dates) are known is critical to ensure that room allocation is optimised, contributions are managed and housekeeping activities enabled. It is a Defence requirement that all attendee details are added prior to check-in

Courses often have designated buildings/rooms defined in the Base Allocation Rules, which may have specific **'course codes'** assigned to enable specific room allocation.

Visibility and Finding Existing Bulk Bookings - The Bulk Booking Tab

You may need to find an existing bulk booking for various reasons including: due to taking a room/building offline, modifying or cancelling or evaluating the booking variables for de-conflicting purposes or to identify the designated POC for the booking.

You can access (only) the bulk bookings you are responsible for i.e. you are the POC or that you created by using the 'Your Bulk Bookings' menu option – *refer to the LIA Dashboard menu items section 4 for details.*

All bulk bookings that exist for a base are accessed via the 'Bulk Bookings' tab or 'Bulk Booking Report' menu option. The tab/report screen displays the bulk booking:
- reference number
- name and type
- start and end dates
- number of attendees (**anonymous attendee numbers are displayed in brackets i.e. no name added**)
- unallocated requests (building or room not allocated to an attendee) and the
- buildings allocated

The screen also offers the following options:
Search - enter the reference number or part of name to find matches
Export – CSV (best) and Excel options at the bottom of the screen.
Calendar View – Exportable into excel – select 'Download Bulk Booking Calendar' and the date range (3 months maximum) – *useful for de-conflicting refer to section 19 for details*.

Access the Bulk Booking Details Screen by clicking on the reference number link.

DASHBOARD	CALENDAR	UNALLOCATED	**BULK BOOKINGS**	ALLOCATIONS	VACANT BEDS	ROOMS	BUILDINGS	UPDATES

Download Bulk Booking Calendar

Search

Reference	Name	Type	Start ▲	End	Attendees (Anon.)	Unallocated Requests	Building(s)
BLK-44912	CSR5048 - GPYR augmentation of 1SECFOR SQN - RIC	Transit	01/07/2016	31/01/2017	15 **(15)**	0	027 (MALE OR Transit)
BLK-49299	IET - AMTDU - RAAFSALT - MOVEMENTS IET PHASE 2 CSE - SESSION 0036	Course	26/08/2016	05/11/2016	11	0	294A (IETS Building A)
BLK-45490	CSR5104 - Ex IRON EAGLE 16	Exercise	10/10/2016	15/10/2016	288 **(288)**	0	027 (MALE OR Transit) 031 032 (SNCO Transit) 033 (SNCO Transit) 071 (Officers Mess) 294A (IETS Building A) 295B (Building B - OR Transit) 338 (3WG Cadets) 345 (SPS/GAP Year)
BLK-45885	IET - AMTDU - UNIT EMPLANING OFFICER COURSE - SESSION 0065	Course	23/10/2016	12/11/2016	5 **(3)**	0	294A (IETS Building A)

The Bulk Booking Details Screen

Bulk Booking Details

Reference	BLK-114314	**Primary Point of Contact**	monica.duniam@dha.gov.au.dhadev
Base	HMAS Creswell, ACT	**Cancelled**	No
Course Type	NEOC_REOC_UEOC	**Created By**	monica.duniam@dha.gov.au *(29/07/2020 8:34 AM)*
Course Name	NEOC 63		
Start Date	17/07/2020		
End Date	28/11/2020		
Number of Attendees	174 (0 sole occupants)		

Finalise Booking   Modify   Export to PDF

The Bulk Booking Details screen is the primary resource for all things related to the bulk booking the following functions apply to this screen:

What	Function
Point of Contact	Visibility of the primary and secondary (if available) POC Use 'Modify' button to update them.
Modify/cancel	Use the 'Modify' button to update booking name, dates, attendee numbers Use the 'Cancel' button if rooms are no longer required.
Attendees	Visibility of unallocated requests (attendees with no rooms) Add or remove actual attendee names Stagger their start and end dates Swap rooms *Refer to the Adding Names to a Bulk Booking process in this section below.*

Buildings/Rooms	Visibility of allocated buildings and rooms Selecting or unselecting buildings and rooms where relevant. *Refer to the Selecting/changing Buildings section above for details*
PDF Export	Printable view of the booking details including rooms and attendees *Handy for key issue to the right member to the right room etc.*
Change History	Display of who and for what reason a change to the booking was made.
Finalising	This returns unused rooms to the pool – *available after one attendee is checked in.*

How do I make a bulk booking?

Note: When finished making a shell bulk booking – you may need to allocate the buildings – *refer to this section below.*

Use the 'Create Bulk Booking' option from the LIA menu.

LIA Administration ˅

Dashboard

Bulk Booking Report

Create Allocation

Create Bulk Booking

Refer to table below for considerations at the various data entry points then select the 'Submit Request' button:

Entry Point	Details
Type	**Select relevant 'Type' from the drop down.**
If selecting 'Course'	<u>Enter the 'Course Code'</u> as outlined on the Base Allocation Rules. If no code exists complete brief logical text entry (*noting course name entry is next*). <u>Enter the 'Course Name'</u> – *Use numbers or other to separate from other similar bookings.*
If not selecting 'Course'	Enter 'Booking Title' – *relevant to activity and unique to separate it from other similar bookings.*
Start Date	Should reflect the expected occupancy period *(if attendees are arriving on different dates, this can be adjusted for individuals later).*
End Date	To equal the room vacancy. Note that check out should occur prior to 10am on the End Date. *Adding an extra day for should be considered if the room is required beyond 10:00am on day of check out.*
Number of Attendees	As reasonably expected this can be modified once confirmed
Sole Occupants	Only populate if rooms have more than one bed and your attendees cannot share – *noting you can indicate this rule for just some of the attendees.*

| Point of contact | Entry only required if this is NOT you, OR your name has not populated. A secondary POC is recommended |

Selecting/Changing buildings for a bulk booking

On creation, a bulk booking will attempt to auto-allocate a <u>single building</u> in accordance with the Base Allocation Rules i.e. those identified for 'bulk' use or defined by 'course codes'. If a single building cannot be allocated no building will be allocated – *considering the below details refer to the select/change building section below.*

Allocated building(s) are displayed with a white tick in a green circle – *refer to image below.*
Unallocated Requests i.e. a building may not be allocated are displayed in a yellow banner on screen.

Course Code selection during booking creation will dictate allocation and the screen will only display those buildings/rooms with that course code restriction applied – *other buildings can be selected where the Base Allocation Rules allow by using the 'Show all non-leap buildings on base, including non-bulk buildings link'.*

Rank/Gender split required? Multiple building selection may be required to meet rank or gender requirements and should be completed as soon as possible. *Example: Your booking may have 20 attendees = 10 SOFF, 5 SNCO and 5 OR and your Base Allocation Rules dictate a requirement for rank segregation into different buildings/floors.*

Risk – Building or room selection for rank or gender splits can be done when adding names – the risk here is room availability can be reduced. *It is recommended that where a possible rank or gender split can be identified early that rooms are selected to accommodate the requirement.*

To select or change a building:

Hint: If uncertain refer to the troubleshooting section below.

Where no buildings are allocated	• Select a building(s) by clicking on the displayed building option(s) in blue boxes then • Select the 'Change Reason' from the drop down options then • Select the 'Change Building' button
To change allocated buildings	• First click on the allocated building(s) to untick then • Select other building(s) by clicking on the other displayed option(s) then • Select the 'Change Reason' from the drop down options (Note: the reason will display on screen with your name) then • Select the 'Change Building' button

Troubleshooting Bulk Building Selection

Bulk Unallocated Requests

May apply to just some or all of the required rooms. Unallocated requests are displayed on the 'Unallocated'

> The **bulk booking POC** will receive an automatically generated email from DHA that informs them of any Unallocated Requests or if any allocated rooms are no longer allocated.

and 'Bulk Bookings' tabs from the base Dashboard and the Bulk Booking Details screen (via a yellow banner).

Unallocated requests may occur due to:
- De-conflicting decisions, room offline or where a person has failed to vacate the room
- No 1 building was able to accommodate all the attendees at creation or
- No buildings were/are available in the date range requested or to meet any 'sole' occupancy or the attendee number requirement.

Risk: Bulk requests do not automatically allocate post initial creation. *This is relevant to note when de-conflicting bookings. They must be manually re-allocated and this action should be taken immediately refer to the Selecting Rooms or building processes in this section above as relevant.*

**If the building you wish to use is not displayed**

Usually this reflects that the building is not designated to use for bulk requests in the Base Allocation Rules.
You can view and allocate if you have authority to do so. Select 'Show all non-LEAP buildings on base...' link to expand your screen display.
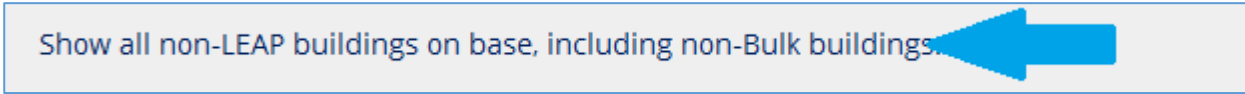
Text displayed against buildings

This text represents the allocation elements determined by the Base Allocation Rules (*refer to section 5 for details*) that are pertinent to that building/rooms as well as the number of vacant rooms:

- Rank group (SOFF, JOFF, SNCO and OR),
- Gender (female, Male only)
- Unit restrictions e.g. image shows the rooms are designated to 176 AD SQN at RAAF Base Richmond.
- Intended use purpose i.e. permanent, transit, temporary bulk or course
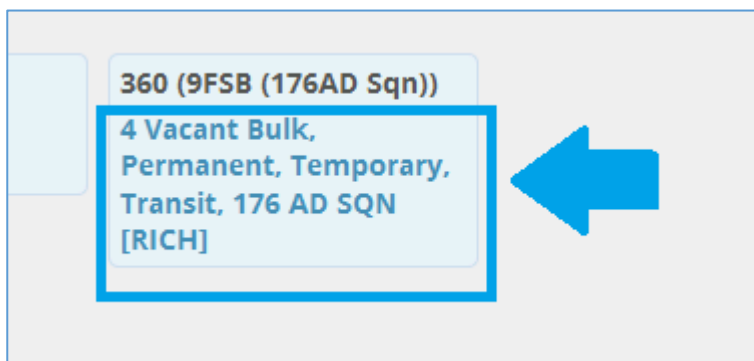
Building displayed is yellow

This indicates that one of the available rooms if used, will cause a back to back booking on base. Back to back bookings should be avoided – *refer to the Back to Back section 15 for details*.

No buildings are available

This could be for a range of reasons, including because the number of attendees cannot be accommodated or the date range is heavily booked. *Consider changing the attendee number or dates (if possible).* If the booking is well in the future, this issue may not be cause for immediate alarm.
If your booking is imminent i.e. within the next few months, and is urgent, you should initially contact DHA on 139342 for assistance.

The responsibility for **de-conflicting decisions** is defined on the Base Allocation Rules *refer to section 5 for details.*

No Vacant Beds displayed – but you know they are available

This is usually due to room restrictions associated to the 'Unit Managed' rule. Only base users with the Unit Management level of access assigned for that Unit will be able to allocate those beds as part of a bulk booking.

Use of Unit Managed rooms usually requires approval from the relevant unit or base management/authority as outlined on the Base Allocation Rules. Contact DHA on 139342 for assistance if required, although DHA do not have authority to allocate into Unit Managed rooms.

Cadet requirements

Cadets include both adult and children. The Base Allocation Rules usually define the specific rules for room and building allocations to cadets, especially where cadets commonly use rooms on base.

Hint: *If the booking is for children it is recommended that reference to this aspect be included in the name of the booking.*

The following rules usually apply:

- Gender separation for children
- Building allocated to cadets should not be used by any other group.

Modifying rooms for a bulk booking

Room selection may occur before or after adding names to your booking, it is usually relevant to gender or rank grouping requirements.

Access the Bulk Booking Details screen then:

1. Select the building first to allow room selection or if using an existing building go to step 2.
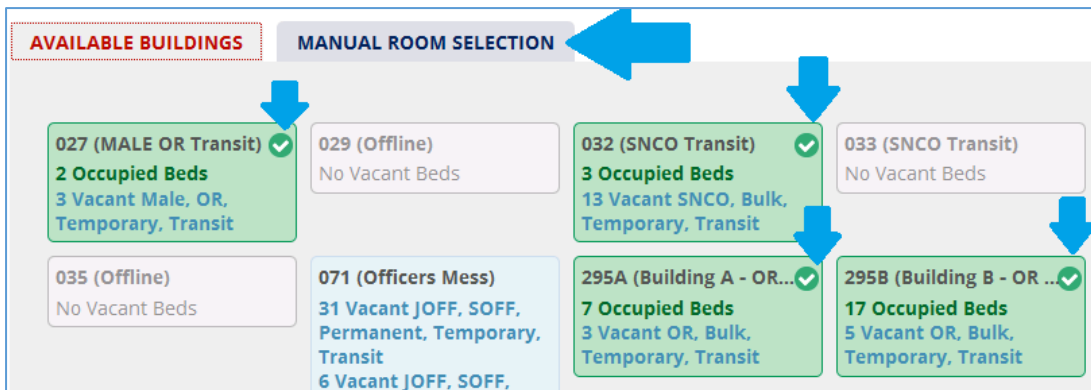
2. Access the 'Manual Room Selection' tab.
3. Un-tick first and then tick required beds as relevant refer to the image below.
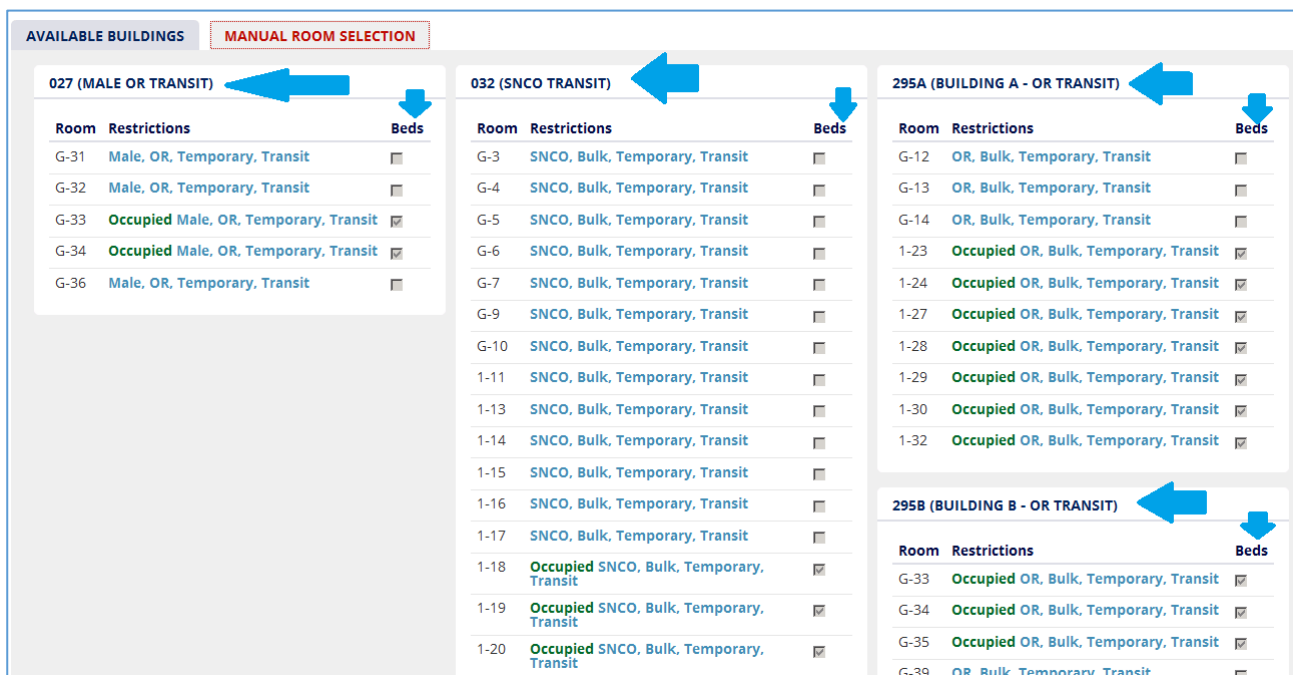
VIP Room Allocation for a Bulk Booking

These rooms are often identified for allocation control by the base or unit responsible. The rooms are restricted to 'Unit Management', with the 'unit' identified.

Where allocation control is at a base level the 'unit' assigned is usually as relevant to general base management/administration i.e. *RAAF ABCP unit name may be used although the room is available to all units.*

The person designated with this responsibility is identified on the Base Allocation Rules document and will have the 'Unit Management' level of access assigned to allow the allocation.

***If another room has already been allocated under the bulk booking**, the user can use the 'Change Room' functionality to put the attendee into a VIP room.*

***If a room has not been allocated** the user can access the bulk booking and they will be able to view VIP rooms and allocate them.*

Adding names to a bulk booking

Where actual names are not added to the booking, room occupants are called 'Anonymous Attendees'.

Anonymous attendees are identified by blue colouring on the base calendar and on the 'Bulk Bookings' tab/report they are displayed in bold brackets against the total attendees.

Adding names to all bookings is a Defence requirement:

- Ensures accurate contribution management;
- Provides visibility of occupancy details;
- Assists with occupant safety and base security in the event of emergency; and
- Ensures that the occupant is responsible for room condition and not the booking POC.

Adding names is the responsibility of the booking POC and <u>must</u> be completed prior to arrival. *The POC will receive 3 emails at 14, 7 and 5 days prior to scheduled arrival to remind them to add names or to cancel the booking if it is no longer required.*

*reminder emails will not be sent fr camp accommodation bookings.

Adding names should occur before the start date. If attendees have been checked in as anonymous, the POC will need to request the service provider to 'undo' the check-in so that the attendee names can be added and then request the check-in process is completed once names are added. This ensures contributions are applied correctly.

Risk - Nil LIA timeline will trigger if attendees are not checked in within the applicable timeframes – *refer to Nil LIA Timeline section 10 for details.*

Room check in should only occur after names have been added.

How do I add names?

Names can be added in bulk or individually.

Entry	How
All names at once	<u>If Employee ID exists:</u> Copy and paste Employee IDs from another source i.e. excel sheet or email, and paste into the 'Attendees' section of the Bulk Booking Details screen, then select 'Search'. <u>If no Employee ID exists:</u> Copy and paste title, First Name, Surname and Gender from another source i.e. excel sheet or email, and paste into the 'Attendees' section of the Bulk Booking Details screen, then select 'Add Attendees'.
Individually	<u>If Employee ID exists:</u> Use same process as above. <u>If no Employee ID exists:</u> Use the 'Attendee Type' drop down to select 'Other', then enter details as indicated and use the 'Add Attendee' button. **Note:** Where the person is a foreign national include the country with and after the First Name and Rank with the Surname. **Example:** John – USA, Smith – CAPT.

ATTENDEES

Attendee Type   Member

❓ Employee IDs

Search

Sole Occupant attendees

If 'sole occupancy' was indicated for some of the attendees during the bulk booking creation, then when adding the attendee names **you will need to indicate 'yes' when adding the 'sole occupants' names** and they will need to be entered separately to the non-sole occupants.

Indicating 'yes' will ensure those occupants will not share a room *(this is important to note if only 'some' attendees are 'sole occupants'.*

***Removing sole occupancy** can be completed using the available button on the Request Details screen for a particular individual or from the whole booking by using the 'modify' option on the Bulk Booking Details screen.*

Switching rooms

This function does not relate to selecting different rooms for your booking – *refer to the 'Selecting rooms for a bulk booking' process in this section above for this requirement.*

Switching rooms applies where you have the correct rooms allocated to your booking but; when adding your attendee names the rooms people have been allocated need to be swapped around.

Switching rooms one by one – *Use the 'switch rooms' button on the right in the Attendees section on the Bulk Booking Details screen to indicate which attendees to swap.*

Switching rooms in bulk – select the relevant attendees (on the left by checking the box or select all by checking the box at the top of the column. Then select the blue 'Reallocate Rooms' button. This will allow you to change attendee rooms by dragging and dropping each attendee into the desired room.

Note: The bulk reallocate room function is only available for attendees who have not been checked in. If you need to change rooms for attendees that have already been checked in, you will need the base service provider or DHA contact centre staff to 'undo' the check-in before you can switch attendees. This ensures that contributions are calculated correctly for all attendees. Once you have finish swapping or reallocating rooms, ensure that the attendees are checked-in appropriately.

Unallocated Requests when adding names

When adding names, a **yellow message banner** may indicate your attendees have gone to the unallocated requests section.

This is usually due to the room(s) allocated to the booking having restrictions relevant to rank group, gender or ablutions that do not match to the attendee(s) applicable rank/gender etc. Example: Yo*ur member is SOFF but the room is restricted to JOFF or SNCO.*

Scenario	Action
If the rooms allocated are to be used	If you are authorised to or have permission from the relevant base authority, you and force the attendees into the rooms by overriding the conflicts. To allocate these attendees into the selected rooms select *the 'Allocate Attendees' option at the bottom right section of the Bulk Booking Details screen. You will be prompted with a warning confirming that you wish to override the conflict. Select confirm to force the allocation*
If the rooms selected should not be used	You may need to rethink the room(s) selected and review available options displayed. If you wish to switch attendees using the currently selected rooms, select all attendees and then select 'reallocate rooms' button. You can then switch attendee rooms by dragging and dropping. *If you need to change rooms that are allocated to the booking because the current rooms are no longer suitable, access the Manual Room Selection tab on the Bulk Booking Details screen to view alternative available rooms in the selected building.* **To change rooms:** *Untick allocated room(s) and tick new room(s) – If rank or gender conditions are met, the unallocated requests will then automatically allocate.* **Note:** If you need to also change the building you will need to untick and tick the new building first before selecting new rooms.

Your Attendees have different Start and End dates

Generally, this level of knowledge applies to bookings where names have been added.

To enter unique start or end dates:
1. *Access the Bulk Booking Details screen.*
2. *Select the box against the relevant attendee*
3. *Select 'Modify Selected' button*
4. *Enter the unique dates as relevant and select 'Save'*

> If you **modify the whole bulk booking dates** any attendees that have different start or end dates will have their dates revert back to the new whole booking date.
> If they remain different, they will again need to be individually updated.

ATTENDEES

Reference
- ☐ 822
- ☐ 857
- ☐ 85
- ☐ 84
- ☐ 822
- ☐ 8   38
- ☐ 85   36
- ☐ 86   2

Modify Selected

Modify, cancel or finalise a bulk booking

Early creation of a bulk booking is important to indicate room needs. Just as important is modifying or cancelling the booking *as the details are known*.

How do you know a change has occurred?
An automatically generated email is sent to the bulk booking POC up to 14 days prior to the booking's earliest start date, <u>as a reminder to check their booking and add names</u>.

An email is also automatically sent where a room(s) has been unallocated against a booking and the bulk request remains unallocated - <u>manual allocation of a new room will be required</u> – *refer to the 'Selecting rooms for a bulk booking' process in this section above for details.*

> Both emails offer the ability to click on the booking name to directly access the booking.
>
> This includes bulk booking POCs who do not have a direct level of access at the base in the BAS
> – **These people can access only that booking and can only add names or cancel.**

To modify or cancel a booking:
1. *Access the Bulk Booking Details screen.*
2. *Click on the 'Modify' or 'Cancel Booking' button as relevant*
3. *If modifying, enter new dates, numbers, POC or booking name as required, and select 'Save'.*

Finalising a booking – are all rooms being used?

Finalising a booking is not mandatory however; it ensures the where some rooms on a booking have ended up not in use they can quickly be released back into the pool for use which enables optimisation of room occupancy.

The functionality is only available after the rooms have been checked in – the Cancel Booking button is replaced with the Finalise Booking button.

The base user with the Service Provider level of access can take this action.

Note: In some scenarios rooms may not actually be occupied but; <u>should not be used by any other booking</u> either, for example a cadet booking cannot share the floor and or building with other bookings.

In this scenario the check in action should occur for all rooms. *If your booking falls into this scenario it is highly recommended that you inform the base contractor of the requirement.*

19.   De-conflicting Bookings

De-conflicting is defined as the requirement for **a decision** to be made about **which booking has priority** over another. This may be for bulk bookings or individual transit.

Hint: Early course booking creation both identifies room requirements and avoids other non-vital bookings taking up room real estate.

If a de-conflicting decision is required, the Base Allocation Rules provides the escalation point of contact on base that has the responsibility. *Refer to the Base Allocation Rules section 5 for details.*

Action taken by this person is captured in the BAS identifying 'who' made the decision and 'when'; this enables future clarity about the decisions made.

The 'Change History' section of the Bulk Booking Details screen also shows what activity has been taken and *provides clear visibility of action/authority*.

Individual transit bookings, especially Non-Duty requests, are usually the first type of bookings affected by de-conflicting decision making. *Refer to the Cancel/Modify and Change Room sections 7 and 8 for details.*

Bulk Booking Calendar Tool

This de-conflicting tool is designed to assist you to identify gaps or booking splits across buildings and any opportunity to fill gaps or consolidate bookings.

Each booking is uniquely coloured displaying the booking reference number, name, and attendees by names added vs (anonymous) in brackets.

Available on the Bulk Booking tab, select 'Download Bulk Booking Calendar'.

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Indicate the 3-month time period you wish to view

Select 'Download' and 'open' on the pop up window to produce the calendar in an Excel spreadsheet export.

Hint: This is also a great tool for course management and visibility.