

# CORE Sales Log 2021/22

STRICTLY CONFIDENTIAL (WHEN COMPLETED)

## LOG SIGNATURES / INITIALS

Purchaser code

UPRN  
(Unique Property Reference Number)

DATE OF COMPLETION OF SALE (e.g. 05/08/21)

Day	Month	Year
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Providers should be able to find their UPRN from AddressBase data here:

<https://data.gov.uk/dataset/addressbase>

### PART A: HOUSEHOLD DETAILS

Complete for ALL sales types.

✓ one only

Purchaser(s) should be informed of use and permission sought at interview.

Please tick one if applicable:

- Purchaser(s) refused to answer some or all questions in Part A
- Purchaser(s) not interviewed

Please note that you should still complete all questions on the sales log even if a purchaser does not have a face to face interview.

Are there more than two joint purchasers of this property?

Yes  1 No  2 Don't know  3

This should be completed for all types of sales.

### 1. HOUSEHOLD CHARACTERISTICS

Enter all demographic details required for person 1. If joint purchaser, enter most economically active purchaser first.

	Age	Gender M/F/X/R	Relationship to Purchaser 1	Economic status	Ethnicity	Nationality
Purchaser 1	<input type="text"/>	<input type="text"/>	n/a	<input type="text"/>	<input type="text"/>	<input type="text"/>

	Age	Gender M/F/X/R	Relationship to Person 1	Economic status	Ethnicity	Nationality
Person 2 / Purchaser 2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Person 3	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Person 4	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Person 5	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Person 6	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

PLEASE ENTER RELEVANT CODE. PLEASE REFER TO CODE LISTS BELOW \*

Relationship to person 1

P = Partner  
C = Child (eligible for child benefit, under 16, or under 20 if still in full-time education)  
X = Other

#### Economic status

- |  |  |
|--|--|
| 1 Full time work (30 hrs or more per week)   | 5 Retired  |
| 2 Part-time work (less than 30 hrs per week) | 6 Not seeking work   |
| 3 Government training/ New deal              | 7 Full-time student  |
| 4 Job seeker                                 | 8 Unable to work because of long term sickness or disability |
|  | 9 Child under 16   |
|  | 0 Other adult  |

#### Ethnic Group

- |   |                                  |                              |
|---|----------------------------------|------------------------------|
| <b>A. White</b>                                     | <b>C. Asian or Asian British</b> | <b>E. Other Ethnic group</b> |
| 1 English, Scottish, Welsh, Northern Irish, British | 8 Indian                         | 19 Arab                      |
| 2 Irish   | 9 Pakistani                      | 16 Other                     |
| 18 Gypsy, Irish Traveller                           | 10 Bangladeshi                   |                              |
| 3 Other   | 11 Other                         |                              |
|   | 15 Chinese                       | <b>Refused</b>               |
|   |                                  | 17 Refused                   |

#### B. Mixed

- |                           |  |
|---------------------------|--|
| 4 White & Black Caribbean | <b>D. Black, African, Caribbean or Black British</b> |
| 5 White & Black African   | 12 Caribbean   |
| 6 White & Asian           | 13 African   |
| 7 Other                   | 14 Other   |

#### Nationality

- |   |  |   |
|---|--|---|
| 1 UK national resident in UK                    | 10 Slovenia                              | * Other EEA countries are Austria, Belgium, Cyprus, Denmark, Finland, France, Germany, Greece, Italy, Luxembourg, Malta, Netherlands, Portugal, Spain, Sweden, Iceland, Liechtenstein, Norway and Switzerland |
| 2 UK national returning from residence overseas | 14 Bulgaria                              |   |
| 3 Czech Republic                                | 15 Romania                               |   |
| 4 Estonia                                       | 16 Croatia                               |   |
| 5 Hungary                                       | 17 Ireland                               |   |
| 6 Latvia  | 11 Other EU Economic Area (EEA*) country |   |
| 7 Lithuania                                     | 12 Any other country                     |   |
| 8 Poland  | 13 Refused                               |   |
| 9 Slovakia                                      |  |   |

**Establishing demographic information is vital to government and housing stakeholders in understanding who is accessing Affordable Home Ownership.**

Please enter all demographic details required using the codes in the code lists. If joint purchasers, enter the most economically active (or oldest if the same) as person 1.

- Age** - Enter the age of each household member in years. Use whole numbers for the ages of children. For children aged 0-1 years enter "1" in the box.
- Gender** - Enter "M" for male, "F" for female, "X" for other and "R" for refused as defined by the individual.

#### Relationship to Person 1

- P for the partner (e.g. husband, wife, co-habitee or a partner of the same sex if the couple has entered into a civil partnership).
- C for dependant children (eligible for child benefit, aged under 16 or under 20 if still in full-time education). Whilst children are identified by relationship to person 1 due to the different age limits depending on circumstances, there is a validation to check compatible 'child relationship' with age.
- X for any other member of the household (e.g. elderly relatives, adult children, lodgers).

#### Economic Status

- Working full time – working 30 hours or more per week.
- Working part time – working less than 30 hours per week.
- Government training/New Deal – on a government training scheme e.g. youth training or is employed within the New Deal Programme **Note:** New Deal, has subsequently been replaced by The Work Programme. For further information please see: <http://www.dwp.gov.uk/docs/the-work-programme.pdf>
- Job seeker – claiming job seeker's allowance, actively seeking/available for work.
- Retired – retired fully from work; usually in receipt of a state and/or occupational pension.
- Not seeking work – those caring for small children or other dependants; those choosing to remain at home and who are therefore not available for work, and would not be registered as unemployed/jobseeker.
- Full-time student – aged 16 or over and still in full-time education whether at school, college, etc.
- Unable to work because of long-term sickness or disability.
- Child under 16 – all members of the household aged under 16.
- Other adult – other adult aged 16 years or over who does not fit into categories 1 to 8.

**Ethnicity and Nationality:** Whilst this information can often be sensitive please stress the anonymity of the log to seek to collect.



<p>8. Which relevant organisation(s) were the purchaser(s) registered with? <b>Tick ALL that apply</b></p> <p>Your PRP (HA) <input type="checkbox"/> Local Authority <input type="checkbox"/> Help to Buy Agent <input type="checkbox"/> Other PRP (HA) <input type="checkbox"/></p>	<p>If any of the purchasers were registered with a local authority, Help to Buy Agent and/or your own or another Private Registered Provider's waiting list/housing register, tick ALL the options that apply. For purchasers who use a housing mobility scheme either "Your PRP", or "Local Authority" should be ticked.</p>
<p>9. Does <u>any</u> household member consider him / herself to have a disability?</p> <p>Yes <input type="checkbox"/> 1 No <input type="checkbox"/> 2 Don't Know <input type="checkbox"/> 3</p>	<p>Tick the "Yes" box if a member of the household says they have a disability or long-term health condition that has an impact on their day-to-day lives. Tick "No" if no member of the household says they have a disability. Person 1 can answer on behalf of household members not present at the interview.</p>
<p>10. Does <u>any</u> member of the household use a wheelchair?</p> <p>Yes <input type="checkbox"/> 1 No <input type="checkbox"/> 2 Don't Know <input type="checkbox"/> 3</p>	<p>Please tick the "Yes" box if a member of the household uses a wheelchair. If a member of the household only uses a wheelchair outside their home you should still tick the "Yes" box. Tick the "No" box if no member of the household uses a wheelchair. If you are unsure, tick "Don't know".</p>

**PART B: PROPERTY DETAILS TO BE COMPLETED FOR ALL TYPES OF SALES ABOUT THE PROPERTY BEING PURCHASED**

<p>11. Number of bedrooms <input type="text"/></p> <p>12. Property type <input checked="" type="checkbox"/> one only</p> <p>Flat / maisonette <input type="checkbox"/> 1 House <input type="checkbox"/> 3 Other <input type="checkbox"/> 9</p> <p>Bedsit <input type="checkbox"/> 2 Bungalow <input type="checkbox"/> 4</p>	<p>Enter the number of bedrooms in the property being purchased. For bedsits enter one bedroom. Tick the relevant box for flat/maisonette, bedsit, house or bungalow. Tick "Other" for any other kind of property.</p>
<p>13. Building type <input checked="" type="checkbox"/> one only</p> <p>Purpose built <input type="checkbox"/> 1</p> <p>Converted from previous residential or non-residential <input type="checkbox"/> 2</p>	<p><b>Purpose built</b> – if the property was built for its current housing purpose and layout. <b>Converted</b> - If the property has been converted into residential use from a non-residential property or has been remodelled to create a different number of units in an existing residential property.</p>
<p>14. Property Location</p> <p>Name of local authority <input type="text"/></p> <p>ONS LA code <input type="text" value="E"/></p> <p>Full postcode <input type="text"/></p>	<p>Enter the name of the local authority in which the property is located. Enter the relevant ONS local authority code (an 8 digit code prefixed by E) in the boxes provided using the codes given in Appendix F of the CORE manual. Enter the FULL postcode of the property, with spaces.</p>
<p>15. Is the property built / adapted for wheelchair standards?</p> <p>Yes <input type="checkbox"/> 1 No <input type="checkbox"/> 2 Don't know <input type="checkbox"/> 3</p>	<p>Wheelchair-accessible housing : suitable for someone who uses a wheelchair and offers full use of all its rooms and facilities; designed or converted according to standards set out in the Housing Corporation Design Quality Standards 2007 or the Wheelchair Housing Design Guide.</p>

**PART C – COMPLETE ONLY ONE SECTION – EITHER SECTION 1, 2 OR 3**

**SECTION 1: SHARED OWNERSHIP SCHEMES**

<p>16. TYPE OF SHARED OWNERSHIP SALE <input checked="" type="checkbox"/> one only</p> <p>Shared Ownership <input type="checkbox"/> 2</p> <p>Older Persons Shared Ownership <input type="checkbox"/> 24</p> <p>Social HomeBuy (shared ownership purchase) <input type="checkbox"/> 18</p> <p>Home Ownership for people with Long Term Disabilities (HOLD) <input type="checkbox"/> 16</p> <p>Rent to Buy – Shared Ownership <input type="checkbox"/> 28</p> <p>Right to Shared Ownership <input type="checkbox"/> 29</p> <p>Shared Ownership – 2021 model lease <input type="checkbox"/> 30</p>	<p>The purchaser buys up to 75% of the property value and pays rent to the Private Registered Provider shared owner on the remaining portion. There are variations on the basic shared ownership: Social HomeBuy on shared ownership terms, Older Persons Shared Ownership, Home Ownership for people with Long Term Disabilities (HOLD). Rent to Buy are lettings provided at intermediate rent for a period of between 6 months and 5 years. During or after that rental period, if the property is sold on shared ownership terms it should be captured here</p>
<p>16a. How long has the purchaser(s) been living in the property prior to purchase? (in years) <input type="text"/></p>	<p>Enter the numerical value, rounding to the nearest year</p>
<p>17. Is this a resale? Yes <input type="checkbox"/> 1 No <input type="checkbox"/> 2</p>	<p>If the social landlord has previously sold the property to another purchaser and is now reselling the property tick "Yes" and code as the original sale type in Q16. If this is the first time the property has been sold tick "No".</p>
<p>17a. Is this a staircasing transaction?</p> <p>Yes <input type="checkbox"/> 1 No <input type="checkbox"/> 2 Don't know <input type="checkbox"/> 3</p>	<p>A staircasing transaction is when the household purchases more shares in their property, increasing the proportion they own and decreasing the proportion the housing association owns. Once the household purchases 100% of the shares, they own the property outright.</p>

<p>18. Key Dates <span style="float:right">LEAVE KEY DATES BLANK FOR RESALES</span></p> <table style="width:100%; border-collapse: collapse;"> <tr> <td style="width:25%;"></td> <td style="width:12.5%; text-align:center"><b>Day</b></td> <td style="width:12.5%; text-align:center"><b>Month</b></td> <td style="width:12.5%; text-align:center"><b>Year</b></td> </tr> <tr> <td>Practical completion / handover date</td> <td style="border:1px solid black; text-align:center"> </td> <td style="border:1px solid black; text-align:center"> </td> <td style="border:1px solid black; text-align:center"> </td> </tr> <tr> <td>Exchange of contracts date</td> <td style="border:1px solid black; text-align:center"> </td> <td style="border:1px solid black; text-align:center"> </td> <td style="border:1px solid black; text-align:center"> </td> </tr> </table>		<b>Day</b>	<b>Month</b>	<b>Year</b>	Practical completion / handover date				Exchange of contracts date				<p><b>Practical completion/handover date</b> – the date on which the building contractor hands over responsibility for the completed property to the PRP.</p> <p><b>Exchange of contracts date</b> – the date on which the sale becomes legally binding with an exchange of signed contracts between the vendor and the buyer. Where properties are sold “off plan”, that is, while the property is still being built, the exchange of contracts date may precede practical completion/handover.</p>
	<b>Day</b>	<b>Month</b>	<b>Year</b>										
Practical completion / handover date													
Exchange of contracts date													

<p>19. Was the household rehoused under an LA Nominations Agreement?          Yes <input type="checkbox"/> 1      No <input type="checkbox"/> 2      Don't know <input type="checkbox"/> 3</p>	<p>A local authority Nominations Agreement is a written agreement between a LA and PRP that a proportion or all of its sales vacancies are offered to LAs to nominate applicants for rehousing.</p>
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<p>IF THE PURCHASER WAS AN PRP (HA) OR LA TENANT GIVE DETAILS OF PROPERTY BEING <u>VACATED</u> (QUESTIONS 20 &amp; 21)</p> <p>20. Number of bedrooms <input style="width:40px;" type="text"/></p> <p>21. Property type <input checked="" type="checkbox"/> one only          Flat / maisonette <input type="checkbox"/> 1    House <input type="checkbox"/> 3    Other <input type="checkbox"/> 9          Bedsit <input type="checkbox"/> 2    Bungalow <input type="checkbox"/> 4</p>	<p>Enter the number of bedrooms of the property being vacated. For bedsits enter one bedroom.</p> <p>Tick the relevant box for the property being vacated: flat/maisonette, bedsit, house or bungalow. Tick “Other” for any other kind of property.</p>
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<p>22. Full Purchase Price (market value before any discount)    £ <input style="width:100px;" type="text"/></p>	<p>Enter the full purchase price (market value before any discount) of the property before any discounts are applied. For shared ownership, enter the full purchase price paid for 100% equity – this is equal to the value of the share owned by the PRP plus the value bought by the purchaser.</p>
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<p>23. Initial % equity stake purchased <input style="width:60px;" type="text"/> %</p>	<p>Enter the amount of initial equity held by the purchaser e.g. 25%, 50%.</p>
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<p>24. Amount of mortgage    £ <input style="width:100px;" type="text"/></p>	<p>Enter the amount of the mortgage the purchaser has agreed with the mortgage lender, excluding any deposits or other cash payments. Enter the name of the lender from the dropdown list.</p>
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<p>24a. Name of mortgage lender <input style="width:100%; height:30px;" type="text"/></p>	<p>The mortgage (Q24) plus deposit (Q26) should equal the equity stake purchased which is calculated as value (Q22) multiplied by equity stake percentage (Q23/100). You will be queried when submitting online if not. Issues may arise because;</p> <ul style="list-style-type: none"> <li>• a field is wrongly left blank,</li> <li>• fields use incorrect units (e.g. £ instead of £'000s),</li> <li>• the equity stake percentage is inputted as the stake held by the landlord rather than the initial equity stake purchased (as should be).</li> </ul>
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<p>24b. Length of mortgage (in years) <input style="width:60px;" type="text"/></p>	
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<p>25. Does this include any extra borrowing?          Yes <input type="checkbox"/> 1      No <input type="checkbox"/> 2      Don't know <input type="checkbox"/> 3</p>	<p>If the mortgage includes borrowing beyond the purchase price of the property tick the ‘Yes’ box, if not tick the ‘No’ box.</p>
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<p>26. Cash deposit paid on property (full cash amount paid by purchaser)    £ <input style="width:100px;" type="text"/></p>	<p>Enter the total cash sum paid by the purchaser towards the property that was not funded by the mortgage i.e. the difference between the cost of the equity stake purchased and the mortgage.</p>
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<p>27. Cash amount of discount given for Social HomeBuy    £ <input style="width:100px;" type="text"/></p>	<p>Enter the total cash discount given on the property being purchased via the Social HomeBuy scheme.</p>
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<p><b>MONTHLY HOUSING COSTS (Excluding mortgage payments)</b></p> <p>28. Basic monthly rent (rent element only)    £ <input style="width:100px;" type="text"/></p> <p>29. Monthly charges (include service charges, management charges, exclude rent)    £ <input style="width:100px;" type="text"/></p>	<p><b>Q28</b> - Enter Basic monthly rent. <b>Q29</b> - Enter any monthly charges payable on leasehold or shared ownership sales. Include service charges and management charges which may cover: day-to-day repairs , transfers to a cyclical maintenance fund, building insurance , cleaning, gardening and lighting (communal areas), audit fees, wardens/scheme managers . Exclude rent.</p>
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**SECTION 2: FULL OWNERSHIP SCHEMES**

<p>30. TYPE OF SALE <span style="float:right">✓ one only</span></p> <p>Right to Acquire (RTA) <input type="checkbox"/> 8</p> <p>Preserved Right to Buy (PRTB) <input type="checkbox"/> 14</p> <p>Voluntary Right to Buy (VRTB) <input type="checkbox"/> 27</p> <p>Right to Buy (RTB) <input type="checkbox"/> 9</p> <p>Rent to Buy – Full ownership <input type="checkbox"/> 29</p> <p>Social HomeBuy for outright purchase <input type="checkbox"/> 21</p> <p>Any other Equity loan scheme <input type="checkbox"/> 22</p>	<p><b>RTA, RTB, PRTB, VRTB:</b> Sitting tenants are offered a discount on the value of the property they purchase.</p> <p><b>Social HomeBuy (for outright purchase):</b> This is an Affordable Home shared ownership scheme which is available only to sitting tenants, who may buy their home outright based on the local Right to Acquire Discount.</p> <p><b>Equity loan schemes:</b> The purchaser buys a proportion of the property and obtains a loan from the PRP to fund the remaining portion.</p> <p><b>Rent to Buy:</b> are lettings provided at intermediate rent for a period of between 6 months and 5 years. During or after that rental period, if the property is sold on full ownership terms it should be captured here.</p>
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<p>30a. How long has the purchaser(s) been living in the property prior to purchase? (in years) <input style="width:100px;" type="text"/></p>	<p>Enter the numerical value, rounding to the nearest year</p>
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<p>31. Full purchase price (market value before any discount) £ <input type="text"/></p>	<p>Enter the full purchase price (market value before any discount) of the property before any loans, grants, discounts or subsidies are applied. For RTB or PRTB sales, enter the full price of the property without any percentage discount.</p>
<p>32. Loan / grant / discount / subsidy given (all schemes except RTB, PRTB, VRTB and Rent to Buy) £ <input type="text"/></p>	<p>Enter the amount of loan, grant, discount or subsidy given on the property being purchased.</p>
<p>33. Enter % discount given (RTB, PRTB &amp; VRTB) (if discount capped, enter capped %) <input type="text"/> %</p>	<p>If the property is being sold to an existing tenant under the RTB, PRTB &amp; VRTB, enter the % discount from the full market value that is being given. For sales where the discount is capped, the capped amount should be entered, e.g., if the purchaser is entitled to a 50% discount but the discount is capped at 35%, the discount to be entered is 35%.</p>
<p>34. Amount of mortgage £ <input type="text"/></p>	<p>Enter the amount of the mortgage the purchaser has agreed with the mortgage lender, excluding any deposits or other cash payments. For HomeBuy do not include any equity or interest free loans.</p>
<p>34a. Name of mortgage lender <input type="text"/></p> <p>If "Other" please enter name here: <input type="text"/></p>	<p>The mortgage (Q34) plus deposit (Q36) plus grant (Q32) should equal the purchase price minus the discount, i.e. multiplying the value (Q31) by (1-Q33/100), where Q33 is the discount as a percentage. You will be queried when submitting online if;</p> <ul style="list-style-type: none"> <li>• a field is wrongly left blank,</li> <li>• fields use incorrect units (e.g. £ instead of £'000s),</li> <li>• the discount percentage is input as the proportion the purchaser is buying rather than the discount given (as it should be).</li> </ul>
<p>34b. Length of mortgage (in years) <input type="text"/></p>	<p>Enter the name of the lender from the dropdown list. Enter the length of mortgage as a numerical value in years, rounding to the nearest year.</p>
<p>35. Does this include any extra borrowing?</p> <p>Yes <input type="checkbox"/> 1      No <input type="checkbox"/> 2      Don't know <input type="checkbox"/> 3</p>	<p>If the ownership of the property includes extra borrowing tick the 'Yes' box, if not tick the 'No' box, where unsure tick the 'Don't Know' box.</p>
<p>36. Cash deposit paid on property (exclude any grant or loan) £ <input type="text"/></p>	<p>Enter the total cash sum paid by the purchaser towards the property that was not funded by the mortgage, that is, the difference between the cost of the property (after any loan or discount has been applied) and the mortgage.</p>
<p><b>SECTION 3: OUTRIGHT SALES / OTHER SALES</b></p>	
<p>37. Monthly charges (where applicable i.e. leasehold, include service and management charges) £ <input type="text"/></p>	<p>Enter any monthly charges payable on leasehold sales. The figure should include service charges and management charge.</p>
<p>38. TYPE OF SALE <input checked="" type="checkbox"/> one only</p> <p>Outright sales (New build or converted) <input type="checkbox"/> 10</p> <p>Other sale <input type="checkbox"/> 12</p> <p>If Other sale, please enter type of scheme: <input type="text"/></p> <p>Note: There is no Q39</p>	<p>Please <b>do not</b> record Right to Acquire (RTA), Right to Buy (RTB), Preserved Right to Buy (PRTB) or Rent to Buy sales in this section as they should be recorded in Question 30. Properties that were previously Rent to Buy but were not purchased at the end of the agreement and subsequently sold on the open market should be recoded as Other sale and type of scheme as "previously Rent to Buy"</p> <p><b>Outright Sales:</b> where the property is sold outright. Please do not record non-social use disposals or auctions as Outright Sales; disposals and auctions should not be recorded as CORE only records sales to qualifying households as Affordable Home Ownership Schemes.</p> <p><b>Other Sales:</b> any other social sale of property which does not fall into specified categories in Sections 1 &amp; 2 of the log</p>
<p>40. Full purchase price £ <input type="text"/></p>	<p>Enter the full purchase price of the property.</p>
<p>41. Amount of mortgage £ <input type="text"/></p>	<p>Enter the amount of the mortgage the purchaser has agreed with the mortgage lender, excluding any deposits or other cash payments. Enter the name of the lender from the dropdown list.</p>
<p>41a. Name of mortgage lender <input type="text"/></p> <p>If "Other" please enter name here: <input type="text"/></p>	<p>The mortgage (Q40) plus deposit (Q42) should equal the purchase price (Q39). You will be queried when submitting online if not. Issues may arise because;</p> <ul style="list-style-type: none"> <li>• a field is wrongly left blank,</li> <li>• fields use incorrect units (e.g. £ instead of £'000s).</li> </ul>
<p>41b. Length of mortgage (in years) <input type="text"/></p>	<p>Enter the numerical value, rounding to the nearest year</p>
<p>42. Does this include any extra borrowing?</p> <p>Yes <input type="checkbox"/> 1      No <input type="checkbox"/> 2      Don't know <input type="checkbox"/> 3</p>	<p>If the mortgage includes borrowing beyond the purchase price of the property tick the "Yes" box, if not tick the "No" box. Additional borrowing would include money for home improvements.</p>
<p>43. Cash deposit paid on property (Full cash amount paid by purchaser) £ <input type="text"/></p>	<p>Enter the total cash sum paid by the purchaser towards the property that was not funded by the mortgage, that is, the difference between the cost of the property (after any discount has been applied) and the mortgage.</p>
<p>44. Monthly charges (where applicable i.e. leasehold, include service and management charges) £ <input type="text"/></p>	<p>Enter any monthly charges payable on leasehold sales. The figure should include service charges and management charges.</p>