# Landlord Portal
# User Notes

## Accessing the Landlord Portal

The starting point for using the Landlord Portal is the Home Page. From here you choose what you want to do first by clicking on one of the available links.

**Landlord Payments** – select this to view details of payments and payment schedules

**Claim Enquiry** – select this to view claim details for individual tenants

You can make your selection by clicking on one of the blue hyperlinks under each heading.



When you have selected either Claim Enquiry or Landlord Payments you will be taken to the following log in screen.

**Please note: The Landlord Portal is not currently supported by some mobile devices and needs to be accessed from a tablet, desktop or laptop PC. The software is supported by browsers Internet Explorer 11 and Chrome version 61 and higher.**

## First Log In

If this is the first time you are logging into the Landlord Portal, make sure you have your username and have contacted us for your password.

On your first log in you can leave the 'Answer to your Memorable Question' blank, this has not yet been set up.

Once you have logged into the Landlord Portal, you will be shown the preferences option automatically and you will be prompted to input a new password, and a memorable question and answer.

**\*\*\*Please DO NOT change your username\*\*\***

Your password must meet the below criteria;

- Minimum Length - 8 Characters
- Must contain a mixture of uppercase and lowercase letters
- Must contain at least one number 0-9
- Must contain at least one of these special characters !£$% &*_-+=#?/

Northgate Self Serve Home **First Login**

**Login**

| | |
|---|---|
| * Default username | |
| * Choose a new username | |
| * Re-enter current password | |
| * Choose a new password | |
| * Re-type new password | |
| * Type in a memorable question (you will be asked for the answer whenever you log in) | |
| * Type in the answer to your memorable question | |

Login

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You can edit the above details at any log in using the preferences button after log in.

Preferences  Log Off

If you want to change your memorable question or answer, overtype the existing details with the new ones. Remember that you will need to enter the answer exactly as you type it here, so in the example above you would need to enter FOREST next time you log in; forest or Forest would not work.
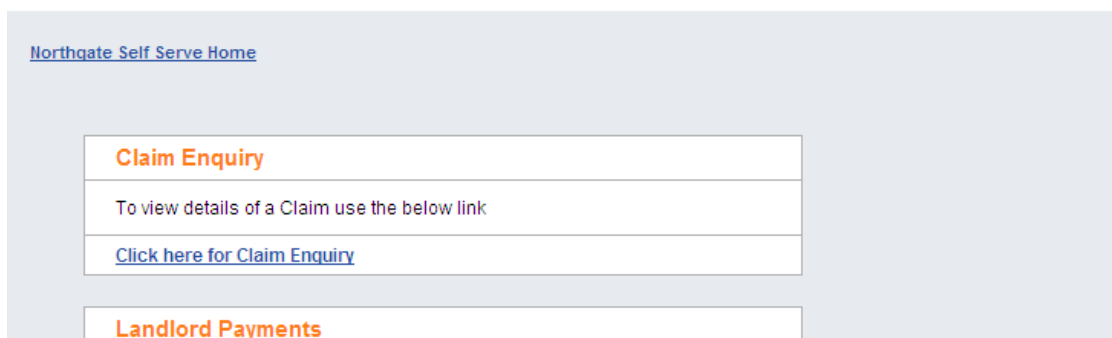
## Logging off

When you have finished using the Landlord Portal you should log off. You do this by clicking on the Log Off button next to the Preferences button as shown.
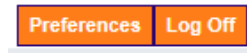


## Landlord Portal time out

The Landlord Portal will automatically log your account out if you have been idle for **20** minutes. You will need to log in again to access the Landlord Portal after this time.



## Claim Enquiry

When you select Claim Enquiry you are directed to the claim search page where you can choose a claim to look at. Here you can enter a claim reference to look at or search through all claims being paid to you, selecting one to look in detail at, at a time.
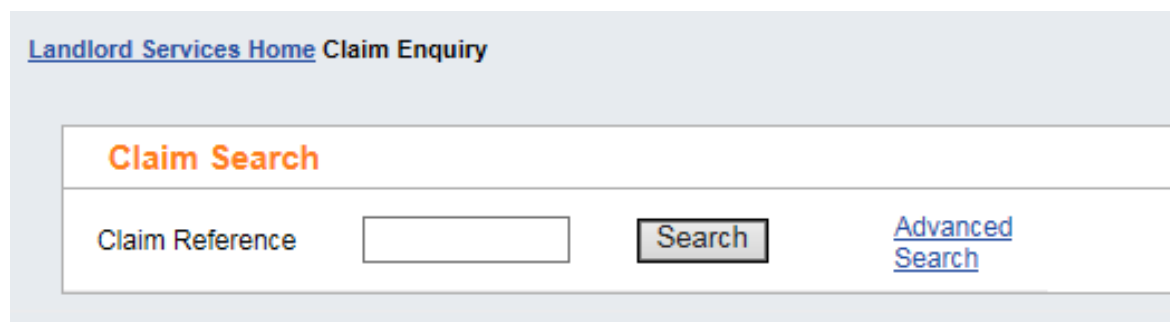


To find a single claim when you know the claim reference, enter the full claim number in the Claim Reference box and either click the Search button on press Enter on your keyboard.

If you do not have the full claim number then click the Advanced Search Button to open the full claim search. Here you have many more search fields to help you to identify the claim(s) that you want to look at.

**Search Criteria**

| Claim | Rent Reference | Current Only ☑ | Active Only ☑ |
|---|---|---|---|
| Surname | Forename | Initials | Title (Any) ▾ |
| Address | Postcode | | |

Note: Use "%" for wildcard search

[ Search ] [ Clear ]

Most of the fields relate directly to claim details, but the 'Current Only' box, when ticked, will find just the claims where you are the current payee whether currently in payment or not. When not ticked, the search returns both the claims where you are the current payee and claims where historically you received payments.

'Active Only' when ticked, will find just claims that are active. When not ticked the search returns both the claims that are currently active and those that are not.

You must enter search criteria in at least one field and you can enter as many fields as you want to and then click the Search button to start the search.

The search is not case sensitive, but it will only find claims that match all the criteria entered. One way to avoid this problem is to use the wildcard character, which on the Landlord Portal is the %. If no claims are found from your searches the search results region will display 'No data Found'

When the claim has been found you have choices on what you can see.

**Claim Summary**
This contains a summary of the claim details as follows:

**Claim Number** – the Housing Benefit claim reference

**Name** – the Housing Benefit claimant

**Address** – the address that the claim has been made for (the tenant's address)

**Status** – the Housing Benefit claim may be **Active** (live), **Cancelled** (ended), **Expired** (ended), **Ineligibl**e (claim refused), **Registered** (claim not yet processed) or **Claim not in payment to you** – limited information available (when today's date is not in the landlords "period of interest")

**Suspended Date** – payments of Housing Benefit may be suspended by the LA; if so, the date they are suspended from shows here

**Rent Reference** – the tenant's tenancy reference if currently held on our system.

**Property Reference Number** – the number that the property is known by to the LA.

**Weekly Recovery Rate** – if there are overpayments being recovered from the ongoing HB payments then this is the weekly amount being recovered.

**Next Payment\*** – the amount of the next payment due, not displayed when today's date is not in the landlords "period of interest"

\* claims that have just been processed may sometimes have a payment due that is in excess of their normal four weekly payment. These are known as 'arrears' of Housing Benefit owed. In these circumstances the 'arrears' part of the total payment due will be made on the next payment.

**Change of circumstances**
This is not currently in use by the authorities and will display "No data found"

**Entitlements**
This shows the weekly entitlement to Housing Benefit for the periods where payment has been made to you. The start and end dates of each entitlement are shown, along with the date it was calculated by the authority. This region is not displayed if the claim is no longer in your "period of interest".

If there are more entitlement records than fit on the screen, a Next link appears with an arrow beside it. To see more records, click Next.

All of the column headings are blue and underlined, e.g. Start Date. This means that you can sort all of the information by that column, e.g. click on Amount and the entitlements are sorted with the lowest amount at the top going down to the highest. If you click it again, the sort goes the other way, from highest to lowest.

**Payments**
This shows the payments that have been made to you on this claim. Discretionary Housing Payments are shown on a separate line to Housing Benefit payments. This may mean that you will see two or more payment for a claim on the payment screen.

If there are more payment records than fit in the region, a Next link appears with an arrow beside it. To see more records, click Next.

Alternatively, click the Export to Excel link to export all payment records into a spreadsheet. You can save the spreadsheet to your own PC or network, but it will not of course be updated as further payments are made.

Both of the column headings are blue and underlined, this means you can sort all of the information by that column, as detailed above.
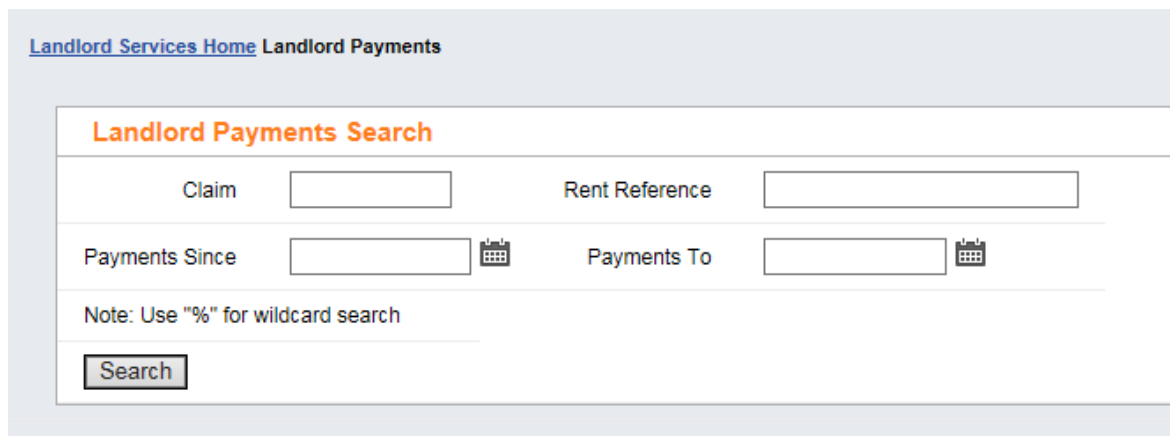
**Notes**
This is not currently in use by the authorities and will display "No data found"

## Landlord Payments

### Searching
You can search for Landlord Payments against claim number, rent references and / or a certain period of time. You are not limited to searching against one option per search.

Landlord Services Home **Landlord Payments**

**Landlord Payments Search**

| Claim | | Rent Reference | |
|---|---|---|---|
| Payments Since | 🗓 | Payments To | 🗓 |

Note: Use "%" for wildcard search

[ Search ]

The search fields are as follows

**Claim** – here you can enter the full or part claim number using wildcards (%). If left blank the search will return all claims that match the criteria entered in the other fields.

**Rent Reference –** this is the rent account or tenancy reference number.

**Payments Since –** here you can enter (or click the calendar icon and select from the pop up calendar) the earliest payment date that you want to see payments for; this is useful if you have been receiving payments for a long time and only want to see recent payments or those in a specific period.

**Payments To –** here you can enter (or click the calendar icon and select it from the pop up calendar) the latest payment date that you want to see payments for; this is useful if you have been receiving payments for a long time and only want to see recent payments or those in a specific period
To execute your query click the search button. The page refreshes to show your search results.

If there are more payment records than fit in the region, a Next link appears with an arrow beside it. To see more records, click Next.

Alternatively, click the Export to Excel link to export all payment records into a spreadsheet. You can save the spreadsheet to your own PC or network, but it will not of course be updated as further payments are made.

All of the column headings are blue and underlined, e.g. Payment Date. This means that you can sort all of the information by that column, e.g. click on Amount and the payments are sorted with the lowest amount at the top going down to the highest. If you click it again, the sort goes the other way, from highest to lowest.

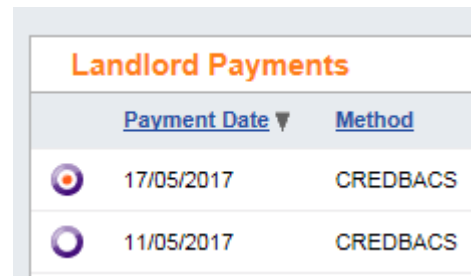The columns of payment information are as follows:

**Payment Date** – the date that the payment was posted on the R&B system. Normally the date the payment run was done. Please note that it may take up to five working days for the payment to arrive in your bank account.

**Method** – the payment method, e.g. CREDBACS is a payment by BACS

**Amount** – the total amount of the payment; note that if you receive combined payments for multiple claims this will be for all claims paid on that payment, even if you searched for a specific claim.

**Viewing payment transaction details**

You can see details of how the payment amount was arrived at by clicking the select radio button to the left of the individual payment. The page refreshes and Landlord Payment Transactions opens beneath the Landlord Payments.

Discretionary Housing Payments are shown on a separate line to Housing Benefit payments. This may mean that you will see two or more payment for a claim on the payment screen. The functions from the previous screen are available as above.

**Each transaction shows the following information:**

**Claim Reference** – the claim that this transaction relates to; this is also a link to the Claim Enquiry page for this claim, so you can go and enquire in more detail on a single claim before returning to Landlord Payments again via a link called Return to List on the top right above the Claim Summary region.

**Claimant** – the name of the claimant that this transaction is for

**Address** – the claim address

**Rent Reference** – the rent account that this payment relates to

**Start** – the start date of the period that the transaction relates to

**End Date** – the end date of the period that the transaction relates to

**Benefit** – the amount of Housing Benefit for the transaction period

**Adjustments** – the amount of any adjustment made to the benefit amount, e.g. if deductions are being made to repay overpaid Housing Benefit

**Total** – the total payment made is respect of the claim in that payment

## To access your latest landlord payment schedule

Housing Benefit payments are produced and received into bank accounts on the below days for each authority.

| Authority | Payment Run | Payment Received |
|---|---|---|
| Ipswich | Wednesday | Monday |
| Ipswich | Friday | Wednesday |
| Babergh / Mid Suffolk | Thursday | Monday |
| Babergh / Mid Suffolk | Monday | Wednesday |

If you have any payments of HB due to you for your tenants on the payment run you will be able to view the payment schedule on the day of production. The information is usually available on the Landlord Portal within an hour of the schedule being produced. Please remember that the actual payment of Housing Benefit will not be in your bank account until a few days later, as above.

You can view this schedule, when you choose Landlord Payments and select a date prior to the creation of the payment.

**Payments Since –** enter a date prior to the latest payment, for example a payment received by you on the 15th May 2017 would have been created on either 10th or 11th May 2017 we would recommend always enter the payment date you are looking for -7.

And click search. If a payment has been produced for any of your tenants in that period, the payment created date, method and amount will be displayed for you to open.

## Leaving the Landlord Payments page

When you want to change to a different page, e.g. switch from Landlord Payments to Claim Enquiry, click the **Landlord Services Home** link (top left) to return to the Home page and make your next selection from there.

Alternatively if you have finished with the Landlord Portal, click the Log Off button in the top right hand corner of the page and your session will be ended.