

# **Agreement**

**Between**

**Shared Service Centre | Benefits**

**And**

**[Insert Landlord Name]**

**Dated**

**[Insert Date]**

## Index of Agreement

<b>1.0 Purpose</b>	<b>4</b>
<b>2.0 Definitions and Interpretations</b>	<b>5</b>
<b>3.0 Term</b>	<b>8</b>
<b>4.0 Confidentiality and Data Protection</b>	<b>9</b>
<b>5.0 Log-in ID Security</b>	<b>9</b>
<b>6.0 Portal Security</b>	<b>10</b>
<b>7.0 Specified Purposes</b>	<b>11</b>
<b>8.0 Portal Data and Information</b>	<b>12</b>
Appendix 1 – Nominated Users Form	14
Appendix 2 - Northgate Landlord Portal User Guide	15

**This Agreement** ('Agreement') is made on [insert date]

Between

**Shared Service Centre | Benefits** department of the London Borough of Haringey ('SSC | Benefits')

And

**[insert name of landlord]** [insert company registration details and address] ('the Landlord')

<b>SSC   Benefits Authorised Signatory</b>		<b>Landlord Authorised Signatory</b>	
Name:		Name:	
Position:		Position:	
Dated:		Dated:	

**This Agreement is valid from [insert date] to [insert date permitted under Clause 3.1]**

**OR**

**This Agreement is valid from [insert date] and is subject to the Term determined under Section 3.0**

## 1.0 Purpose

- 1.1 This Agreement permits access to and usage of the Northgate Landlord Portal (**'the Portal'**) in accordance with the Terms and Conditions, definitions, interpretations, requirements and clauses contained in this document (**'SLA'**).
- 1.2 Access to the Portal is only granted while the Agreement remains valid and only for the duration of the specified Term in accordance with **Section 3.0**.
- 1.3 The Agreement is between SSC | Benefits and the Landlord and both terms should be interpreted in accordance with the definitions in **Clause 2.1**.
- 1.4 The Agreement between SSC | Benefits and the Landlord shall be deemed invalid in any case of:
  - a. non-compliance with any of the Terms and Conditions, Sections and clauses of the SLA
  - b. inappropriate or improper access to the Portal or any data and information available via the Portal
  - c. misuse, inappropriate use or improper use of the Portal or any data and information available via the Portal
  - d. failure to comply with relevant Data Protection requirements
  - e. failure to ensure access to the Portal is controlled and remains secure
  - f. failure to prevent unauthorised use of the Landlord's unique Log-in ID or unauthorised access to the Portal
  - g. failure to adhere to password and security protocols
- 1.5 Where the Agreement is invalidated in accordance with one or more of the **sub-clauses 'a' to 'g' of Clause 1.4** the Landlord's Log-in ID will be disabled and access to the Portal revoked.
- 1.6 Where **Clause 1.5** is invoked access to the Portal will not be reinstated unless and until the Landlord:
  - a. demonstrates that steps have been taken to remedy the matter that invalidated the Agreement under **Clause 1.4**
  - b. has introduced appropriate measures to prevent a recurrence of the matter that invalidated the Agreement under **Clause 1.4**
  - c. satisfies SSC | Benefits that the remedy and measures are effective and robust
- 1.7 Where the Landlord satisfies SSC | Benefits that access should be reinstated in accordance with **Clause 1.6** access to the Portal shall be granted for a fixed-term probationary period not exceeding six months.
- 1.8 Where **Clause 1.7** applies any further invalidation of the Agreement during the fixed-term probationary period will lead to revocation of access to the Portal for a period to be determined by SSC | Benefits.

1.9 The minimum period determinable under **Clause 1.8** is six months. The maximum period is unlimited.

1.10 Where **Clause 1.7** applies and the Landlord completes the probationary period access will be granted for the duration of the Term specified (if any) when the Agreement was entered in to.

**2.0 Definitions and Interpretations**

2.1 In this SLA the following terms shall be defined and interpreted as detailed in **Clause 2.1**.

<b>Agreement</b>	the agreement between SSC   Benefits and the Landlord that access to the Portal is solely permitted on the basis of the Landlord’s acceptance of and adherence to the Terms and Conditions, definitions, interpretations, requirements and clauses detailed in this SLA
<b>access</b>	access to the Portal granted by SSC   Benefits subject to compliance with the Agreement for the specified Term (if any)
<b>access rights</b>	the level of access attributed to a unique Log-in ID under <b>Clause 5.3</b>
<b>anti-virus</b>	computer software intended to prevent, detect and remove computer viruses and malicious software
<b>confidential information</b>	this Agreement, any data or information that might reasonably be considered confidential, any data or information about or available via the Portal (including data or information viewed on screen and, if permitted by SSC   Benefits, printed copies of data or information held on the Portal), any data or information that might reasonably be considered the Intellectual Property Right of Northgate Public Services and any data or information covered by Data Protection requirements including any data or information which can be construed as personal data
<b>data or information</b>	the content in this document and any details available via the Portal (whether on screen or, if permitted by SSC   Benefits, printed copies of details held on the Portal)
<b>Data Protection requirements</b>	the Data Protection Act 1998 and any statute, regulation or policy regarding access, use and protection of data and information
<b>firewall</b>	a computer security system preventing unauthorised access to a network
<b>Haringey</b>	London Borough of Haringey
<b>Intellectual Property Rights</b>	any trademark, service mark, logo, design, domain, database or functionality directly or indirectly attributable to Haringey, Northgate Public Services or the Portal or any trademark, service mark, logo, design, domain, database or functionality that might reasonably be attributable to Haringey, Northgate Public Services or the Portal

<b>liability</b>	includes but is not limited to actions, claims, costs, damages, expenses and losses incurred directly or indirectly as a consequence of non-compliance
<b>Log-in ID</b>	The unique credentials granted by SSC   Benefits to the Landlord for the purposes of accessing the Portal
<b>Log-in ID Security</b>	shall be interpreted in accordance with <b>Section 5.0</b>
<b>misuse, inappropriate use, improper use, inappropriate access, improper access</b>	accessing or using or attempting to access or use the Portal to obtain or attempt to obtain data or information which the Landlord would not otherwise be entitled to obtain from SSC   Benefits and using or attempting to use data and information available via the Portal for reasons not specified in <b>Clause 7.2</b> and providing or obtaining or attempting to provide or obtain data and information available via the Portal to a person, company or organisation other than the Landlord and access or use or attempted access or use of the Portal by a person, company or organisation using the Landlord's unique Log-in ID without the Landlord's permission, authorisation or designation and access or use or attempted access or use of the Portal by a person, company or organisation using the Landlord's unique Log-in ID with the Landlord's permission, authorisation or designation who has not identified to SSC   Benefits as a nominated user
<b>month</b>	a calendar month
<b>nominated user</b>	a named employee, representative or agent of the Landlord who has been identified to SSC   Benefits as having the Landlord's permission, authorisation or designation to use the Landlord's unique Log-in ID for the purposes of accessing and using the Portal and data and information available via the Portal for or on behalf of the Landlord
<b>Northgate Public Services</b>	the provider of the Northgate Landlord Portal and Intellectual Property Rights owner of any trademark, service mark, logo, design, domain, database or functionality directly or indirectly attributable to the Portal
<b>non-compliance</b>	direct or indirect failure by the Landlord or by the Landlord's permitted, authorised or designated employee, representative or agent to comply with the Terms and Conditions, definitions, interpretations, requirements and clauses outlined in the SLA
<b>permitted, authorised or designated employee, representative or agent</b>	a staff member or third party permitted, authorised or designated by the Landlord to use the Landlord's unique Log-in ID for the purpose of accessing the Portal on or on behalf of the Landlord
<b>personal data</b>	has the meaning assigned in the Data Protection Act 1998
<b>Portal Data and Information</b>	any data and information available via the Portal on-screen or if permitted by SSC   Benefits (in accordance with Data Protection requirements) any stored, printed and electronic copies or images of data and information obtained from the Portal
<b>Portal Security</b>	shall be interpreted in accordance with <b>Section 6.0</b>
<b>Section</b>	means a section of the SLA

<b>SLA</b>	the Terms and Conditions, definitions, interpretations, requirements and clauses of the Agreement that the Landlord and any permitted, authorised or designated employee, representative or agent must comply with to obtain and retain access to the Portal for the duration of the specified Term (if any)
<b>specified purposes</b>	access to and use of the Portal and any data or information available via the Portal is only granted where the Landlord would otherwise be entitled to obtain that data or information from SSC   Benefits and is limited to the purposes listed in <b>Clause 7.2</b>
<b>SSC   Benefits</b>	Haringey benefits service
<b>Term</b>	subject to compliance with the SLA the period during which the Agreement remains valid in accordance with <b>Section 3.0</b>
<b>the Landlord</b>	the person, company or organisation agreeing to the Terms and Conditions, definitions, interpretations, requirements and clauses of the Agreement and any permitted, authorised or designated employees, representatives or agents acting for or on behalf of the Landlord who have been identified to SSC   Benefits as nominated users
<b>the Portal</b>	the Northgate Landlord Portal
<b>unauthorised access or use</b>	direct or indirect failure by the Landlord to protect access or use of the Landlord's unique Log-in ID or direct or indirect failure by the Landlord to restrict access or use of the Portal for specified purposes only or direct or indirect failure by the Landlord to prevent access to or use of the Landlord's unique Log-in ID or the Portal by a person, company or organisation who does not have the Landlord's permission, authorisation or designation
<b>usage</b>	usage of the Portal granted by SSC   Benefits subject to compliance with the SLA during the specified Term in accordance with <b>Section 3.0</b>
<b>vary</b>	to amend any term or condition of the SLA by increasing, decreasing, permitting, limiting, restricting or revoking access to or use of the Portal or data or information available via the Portal on grounds including, but not limited to, statutory requirement, security, Data Protection, the interests of Haringey or SSC   Benefits, non-compliance, compliance or any basis which would reasonably require SSC   Benefits to amend any term or condition of the SLA

2.2 Except where the context otherwise requires terms set out in the SLA shall be taken to have the meaning, interpretation or definition which is assigned, inferred, implied or specified in **Clause 2.1**.

2.3 This Agreement is not intended as a representation of any Act, statutory requirement, edict, regulation or code of practice and should not be taken as such.

### 3.0 Term

- 3.1 Subject to **Clause 3.6** this Agreement shall remain valid:
- a. for the duration specified by SSC | Benefits (if any) when the Agreement was entered in to
  - b. where **sub-clause 'a' of Clause 3.1** does not apply for a period not exceeding 3 years
- 3.2 Where the Agreement remains valid for the maximum period permitted by **sub-clause 'a' or 'b' of Clause 3.1** SSC | Benefits may:
- a. treat the Term of the Agreement granted under **sub-clause 'a' or 'b' of Clause 3.1** as having been extended or continued
  - b. require the Landlord to renew the Agreement at the end of the Term
- 3.3 Where SSC | Benefits extends or continues the Term of the Agreement under **sub-clause 'a' of Clause 3.2** the Landlord shall be treated as having renewed the Agreement and all existing Terms and Conditions, definitions, interpretations, requirements and clauses.
- 3.4 SSC | Benefits reserves the right to:
- a. vary, restrict or limit any Term granted in accordance with **Clause 3.1, Clause 3.2 and Clause 3.3**
  - b. require the Landlord to regularly renew the Agreement regardless of any Term granted in accordance with **Section 3.0**
  - c. where **Clause 3.6** applies further vary, restrict or limit any existing, extended, continuing or renewed Term
- 3.5 Failure to adhere to **Clause 1.4** will invalidate the Agreement including any Term provided for in accordance with **Section 3.0**.
- 3.6 Any Term granted under **Section 3.0** shall cease to apply for the duration of any fixed-term probationary period imposed in accordance with **Clause 1.7**.
- 3.7 Where a Term has been granted, extended, continued or renewed in accordance with **Section 3.0** the Landlord and the Landlord's permitted, authorised or designated employee, representative or agent retain access to the Portal.
- 3.8 Where the Landlord no longer intends to access the Portal any Term granted in accordance with **Section 3.0** will expire immediately and access to the Portal will be disabled immediately.
- 3.9 Where a Term has expired under **Clause 3.8** the Landlord can only regain access to the Portal by entering into a new Agreement with SSC | Benefits.



- 3.10 Where under **Clause 3.4** SSC | Benefits varies, restricts or limits a Term or further varies, restricts or limits a Term or requires renewal of the Agreement the Landlord will be notified of:
- a. the reason(s) for the variation, restriction or limitation or further variation, restriction or limitation
  - b. the duration of the variation, restriction or limitation or further variation, restriction or limitation
  - c. the reasons that a renewal of the Agreement is required
  - d. the frequency that a renewal of the Agreement is required

#### **4.0 Confidentiality and Data Protection**

- 4.1 Confidentiality, confidential information, Data Protection requirements, personal data and Intellectual Property Rights shall be taken to have the meaning, interpretation or definition which is assigned, inferred, implied or specified in **Clause 2.1**.
- 4.2 Notwithstanding the generality of **Clause 4.1** confidentiality, confidential information, Data Protection requirements, personal data and Intellectual Property Rights shall without limitation be treated as having any meaning, interpretation or definition which is assigned, inferred, implied or specified by the everyday meaning and everyday usage of those terms.
- 4.3 Any failure regarding a breach of confidentiality, confidential information, Data Protection requirements, personal data and Intellectual Property Rights will invalidate the Agreement in accordance with **Clause 1.4**.
- 4.4 For the avoidance of doubt where the Agreement is invalidated in accordance with **Clause 4.3** SSC | Benefits and Haringey shall accept no direct or indirect liability and the Landlord shall:
- a. be held solely responsible and accountable for such a breach
  - b. indemnify SSC | Benefits against all actions, claims, costs, damages, expenses, losses and liabilities directly or indirectly arising or as a consequence of non-compliance under **Clause 4.3**

#### **5.0 Log-in ID Security**

- 5.1 Failure to adhere to the Clauses in this Section will invalidate the Agreement in accordance with **Clause 1.4**.
- 5.2 The Landlord's unique Log-in ID is assigned by SSC | Benefits solely for the purposes of enabling access to the Portal.
- 5.3 SSC | Benefits will determine the access rights attributable to the unique Log-in ID to allow, restrict or limit the specified purposes listed in **Clause 7.2**.
- 5.4 The Log-in ID enables access to the Portal for a limited number of nominated users.

- 5.5 The Log-in ID is password protected and authentication is required to gain access to the Portal.
- 5.6 The Landlord is responsible for ensuring:
- a. the Log-in ID is only used to access the Portal via a secure network
  - b. precautions are taken to ensure the Log-in ID remains secure and protected by appropriate use of up-to-date firewall and anti-virus software
  - c. the Log-in ID is confidential and secure at all times
  - d. passwords are confidential and secure at all times
  - e. passwords are not shared, transferred or disclosed
  - f. passwords are regularly updated
  - g. SSC | Benefits are provided with details naming each nominated user
  - h. SSC | Benefits are notified if a nominated user leaves or changes jobs roles
- 5.7 SSC | Benefits reserves the right to:
- a. vary, restrict or limit the access rights allowed by the Log-in ID under **Clause 5.3**
  - b. vary, restrict or limit the number of nominated users accessing the Portal using the Log-in ID under **Clause 5.4**
  - c. suspend the Log-in ID and access to the Portal where the Agreement is invalidated under **Clause 1.4**
  - d. revoke the Log-in ID and access to the Portal where the Agreement is invalidated under **Clause 1.8**
  - e. limit the period that a password can remain active before expiring
- 5.8 Where SSC | Benefits introduces a variation, restriction, limitation or revocation under **Clause 5.7** the Landlord will be notified of:
- a. the reason(s) for the variation, restriction, limitation or revocation
  - b. the duration of the variation, restriction, limitation or revocation
  - c. where the duration is limited the action the Landlord must take for SSC | Benefits to remove the variation, restriction, limitation or revocation
- 5.9 For the avoidance of doubt SSC | Benefits and Haringey shall accept no direct or indirect liability arising or as a consequence of non-compliance with **Clause 5.6**.
- 6.0 Portal Security**
- 6.1 Failure to adhere to the Clauses in this Section will invalidate the Agreement in accordance with **Clause 1.4**.
- 6.2 On first access to the Portal the Landlord is required to set-up a security question and answer.
- 6.3 The answer to the security question will be required each time the Log-in ID is used to access the Portal.
- 6.4 The Landlord is responsible for ensuring:

- a. the Portal is only accessed via a secure network
- b. precautions are taken to ensure the network remains secure and protected by appropriate use of up-to-date firewall and anti-virus software
- c. the security question and answer remain confidential and secure at all times

6.5 SSC | Benefits reserves the right to:

- a. require security questions and answers to be regularly updated
- b. expire security questions and answers after a specified duration

6.6 Where SSC | Benefits invokes **Clause 6.5** the Landlord will be notified of:

- a. the reason(s) for the requirement
- b. the frequency that regular updates are required
- c. the maximum duration of the security question and answer before expiry

6.7 For the avoidance of doubt SSC | Benefits and Haringey shall accept no direct or indirect liability arising or as a consequence of non-compliance with **Clause 6.4**.

## 7.0 Specified Purposes

7.1 Failure to adhere to the Clauses in this Section will invalidate the Agreement in accordance with **Clause 1.4**.

7.2 Access to the Portal is limited to claims where the Landlord receives direct payments of Housing Benefit and is granted only for the following specified purposes:

- a. viewing Landlord payment details
- b. viewing basic claim details
- c. adding notes to a claim
- d. notifying a change in circumstances
- e. notifying a rent increase

7.3 Access to any or all of the specified purposes listed in **Clause 7.2** is determined by SSC | Benefits and those access rights are attributed to the Landlord's unique Log-in ID under **Clause 5.3**.

7.4 The Landlord is responsible for ensuring access to and use of the Portal is for the specified purposes permitted by the access rights of the unique Log-in ID.

7.5 The Portal must only be accessed using the Landlord's unique Log-in ID.

7.6 The unique Log-in ID must only be used by the Landlord or a permitted, authorised or designated employee, representative or agent who the Landlord has identified as a nominated user.

7.7 Where the Landlord is granted access to the specified purposes listed under **sub-clauses 'c' to 'e' of Clause 7.2** the Landlord is responsible and accountable for ensuring:

- a. such access is only undertaken by the Landlord or a nominated user
- b. any data or information that could be construed as confidential information under **Clause 2.1 and Section 4.0** is treated appropriately
- c. any data used to notify SSC | Benefits of a change is both accurate and necessary
- d. notes added to a claim are both accurate and necessary
- e. all language, references and content notified or added by the Landlord or the nominated user cannot be construed either directly or indirectly as defamatory, discriminatory, offensive or liable to cause distress

7.8 Where the Agreement is invalidated in accordance with **sub-clauses 'b' or 'e' of Clause 7.7** the Landlord's Log-in ID will be disabled and access to the Portal revoked.

7.9 For the avoidance of doubt where the Agreement is invalidated in accordance with **sub-clauses 'b' or 'e' of Clause 7.7** SSC | Benefits and Haringey shall accept no direct or indirect liability and the Landlord shall:

- a. be held solely responsible and accountable for such non-compliance
- b. indemnify SSC | Benefits against all actions, claims, costs, damages, expenses, losses and liabilities directly or indirectly arising or as a consequence of non-compliance with **sub-clauses 'b' or 'e' of Clause 7.7**.

## 8.0 Portal Data and Information

8.1 Failure to adhere to the Clauses in this Section will invalidate the Agreement in accordance with **Clause 1.4**.

8.2 Portal Data and Information shall be interpreted and treated in the same way as data and information referred to in **Section 4.0**.

8.3 The Landlord is responsible for ensuring all on screen data and information available via the Portal and if permitted by SSC | Benefits (in accordance with Data Protection requirements) all stored, printed or electronic copies or images of data and information available via the Portal:

- a. is restricted to the Landlord or a nominated user
- b. is not subject to misuse, inappropriate use or improper use
- c. is treated confidentially and securely in accordance with **Clause 2.1 and Section 4.0**
- d. is not used for any purpose other than a specified purpose listed in **Clause 7.2**
- e. if permitted by SSC | Benefits (in accordance with Data Protection requirements) is not stored or retained for longer than reasonable and for no longer than is lawfully allowed

8.4 Where SSC | Benefits permits the Landlord (in accordance with Data Protection requirements) to use or store printed or electronic copies or images SSC Benefits reserves the right vary, restrict, limit or revoke any such permission.

- 8.5 Where SSC | Benefits varies, restricts, limits or revokes permission under **Clause 8.4** the Landlord will be notified of:
- a. the reason(s) for the variation, restriction, limitation or revocation
  - b. the duration of the variation, restriction, limitation or revocation
  - c. where the duration is limited the action the Landlord must take for SSC | Benefits to remove the variation, restriction, limitation or revocation
- 8.6 For the avoidance of doubt where the Agreement is invalidated in accordance with **Clause 8.3** SSC | Benefits and Haringey shall accept no direct or indirect liability and the Landlord shall:
- a. be held solely responsible and accountable for such non-compliance
  - b. indemnify SSC | Benefits against all actions, claims, costs, damages, expenses, losses and liabilities directly or indirectly arising or as a consequence of non-compliance with **Clause 8.3**

**Appendix 1 – Nominated Users Form**

<b>Landlord / Log-in ID</b>	
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<b>Nominated User</b>	<b>Job Role</b>	<b>Date</b>

## Appendix 2 - Northgate Landlord Portal User Guide



# Northgate Landlord Portal User Guide

## 1 Purpose of this guide

It explains what information can be found on the portal and the functionality available to send information via the portal to the authority.

As the ultimate users of the portal will be landlords rather than LA staff, the guide is written with the landlord as the audience rather than the LA.

The levels of functionality available to the landlord are controlled by the LA and not all of this guide will be relevant to all landlord users.



## 2 Introduction

The Landlord Portal uses Northgate's Self-Serve public facing services application. The application allows access by members of the public and outside organisations to the Northgate Revs & Bens System online, via a web portal.

The LA decides and configures the level of access individually for each landlord.

**Important note:** Landlords are only ever able to see details of claims for which they are receiving direct payment of Housing Benefit.

The available functionality is summarised below:

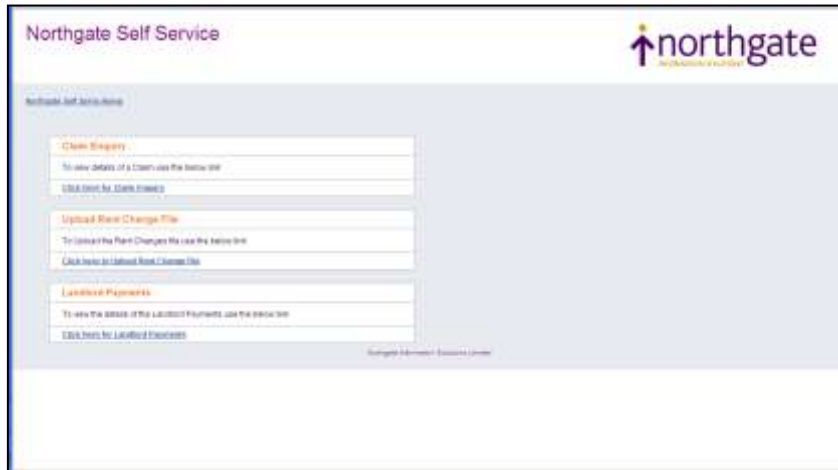
- **Claim Enquiry**
  - Search for one or many claims
  - Details of the current weekly Housing Benefit entitlement
  - Details of payments made
  - Link to inform the LA of a change in circumstances that may affect the claim **(Available to high level users only)**
  - Link to add notes to a claim **(Available to high level users only)**
  - View change of circumstances previously notified to the LA
  - View notes that were added to a claim via the Portal along with the LA's response
- **Landlord Payments**
  - Search and Check for payments made
  - View the payment transactions included in the overall payment for the claim(s) searched for
  - Link from each transaction to the associated Claim Enquiry pages for that particular claim

## 3 Logging in and out of the Landlord Portal

### 3.1 Logging in

The starting point for using the Landlord Portal is the Home Page (Fig 1). From here you choose what you want to do first by clicking on one of the available links. The portal security checks whether you have already logged in and if not, it directs you to the log in page.

Fig 1 - Landlord Portal Home Page



There are 2 options available:

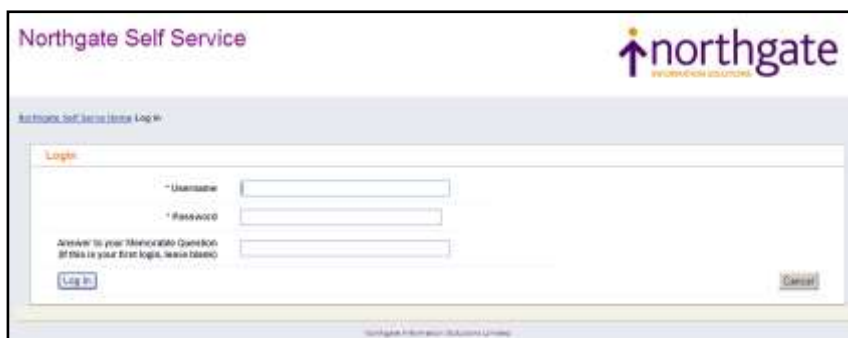
**Claim Enquiry** - select this to view claim details

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

Make your selection by clicking on the blue hyperlinks available under each heading, e.g. [Click here for Claim Enquiry](#)

Once you have made your selection, the Log in Page (Fig 2) is displayed and you are prompted for your username, password and answer to your memorable question.

Fig 2 - Log in Page



If you log in successfully then you are taken to the page that you selected on the Home Page. Details of each of the options are given in the following sections of this guide.

If the details entered are incorrect then the log in fails and you are asked to try again. Your memorable question is displayed to help you to recall your memorable answer.

You have five attempts to log in: after five incorrect attempts your account is locked and you will contact the Local Authority's system administrator access to unlock it.

### First Login

The first time you log into Northgate Landlord Portal you are taken to the First Login page (Fig 3) where you can choose to change your username and password and also provide a memorable question and answer.

Fig 3 - First Login Page

Northgate Self-Serve Home First Login

**Login**

\* Default username COLLYMORE

\* Choose a new username COLLYMORE

\* 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) What football team did I play for in Nottingham

\* Type in the answer to your memorable question Nottingham Forest

Login

Northgate Information Solutions Limited

After the first login you can change your password and memorable question/answer using the Preferences page (see below).

### Preferences

Once you are logged into the Landlord Portal you can look at and change some of your user details using the Preferences page. Get there by clicking the Preferences button that appears in the top right hand corner of most of the pages (Fig 4).

Fig 4 - Self Service banner showing the Preferences and Log Off buttons



The Preferences page (Fig 5) displays the details the portal currently holds about your memorable question/answer and contact information. There are also two empty fields that are used if you want to change your password for logging onto the portal.

Fig 5 - Preferences Page

Notthoate Self Service Home Preferences

**Preferences**

\* Memorable Question: What football team did I play for in Nottingham

\* Answer to Memorable Question: FOREST

Email Address: pollymore@hotmail.com

Mobile Phone: 0777777487

Preferred Contact Method:  Email  Letter

New Password (leave blank if you don't want to change it):

Re-type new password:

Save Maintain Users Cancel

Notthoate Information Solutions Limited

What you can do here:

- Change Memorable Question - this appears to help you recall your memorable answer, if you enter incorrect details when logging on
- Change Memorable Answer - this will change the answer that you need to enter when logging on
- Change email address - this is not used by the Landlord Portal but can be viewed by the LA
- Change mobile phone number - this is not used by the Landlord Portal but can be viewed by the LA
- Change preferred communication method - this should always be set to Letter
- Change Password - changes your Landlord Portal password

If you want to change your memorable question or answer, overwrite 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.

You can enter or amend your email address or mobile phone number by overtyping the current details.

To change your password, type your new password in both boxes. As with the memorable answer, the password is case sensitive so when logging in next time you will have to enter it exactly the same as you do it here. Your password needs to be at least 6 characters long and include at least one upper case character, one lower case character and one number.

Once you have finished entering your changes, click Save. If you do not save the changes they will be lost and your previous preferences will still apply.

If you do not want to make any changes to your current Preferences then click Cancel to leave the page.

## 3.2 Logging out

### User log out

When you have finished using the Landlord Portal you should log out. Do this by clicking on the Log Off button next to the Preferences button (see Fig 4 above).

When you log out you are taken to a common home page for Northgate Self Service (Fig 6). This may include options that you don't use and don't have access to (if you chose one you'd find that your password doesn't work on it).

From here you can close your browser (or just go to a different web page), or if you decide that you are not finished with the Landlord Portal after all, you can select an option from the list and log in again.

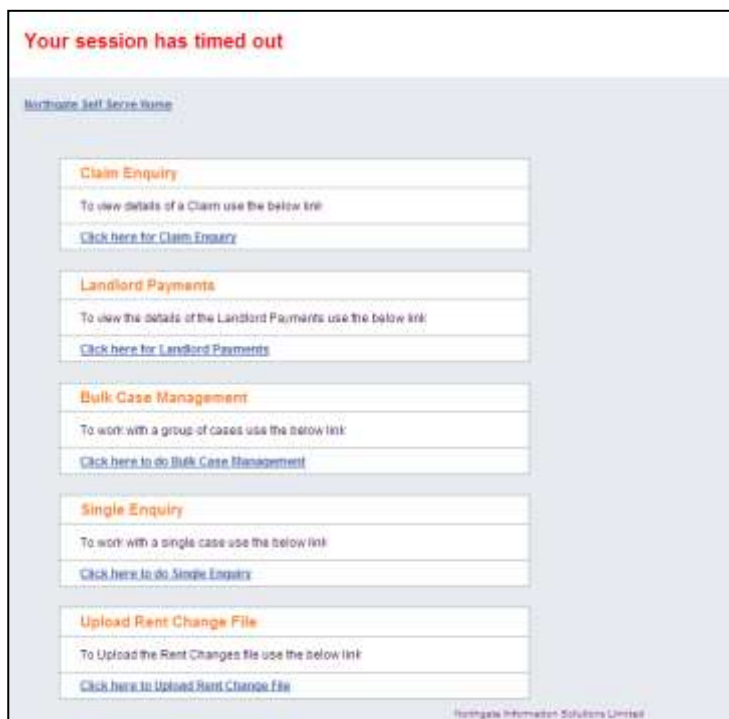
### Automatic log out

The portal automatically logs you out if your session has been idle for more than 20 minutes. When you return to your portal session and try to do something (e.g. click on a button) you are returned to the common home page with a message telling you that your session has been ended (Fig6).

If you are finished with the portal then you can just close your browser or go to a different web page. If you are not finished, then choose the option that you want from the list and log back in as normal.

Note that the common home page may include options that you don't use and don't have access to (if you chose one you'd find that your password doesn't work on it).

Fig 6 - The common Home Page showing the message displayed when a user is timed out



## 4 Using the Landlord Portal - Claim Enquiry

The Claim Enquiry facility enables you to look in detail at each Housing Benefit claim that is being paid directly to you. You can download payment details and send notes or notify a change of circumstances to the LA.

### 4.1 Claim Search

#### Two types of claim search

When you choose the Claim Enquiry link you are directed to the Claim Search page (Fig 7) so that you can choose a claim to look at. Here you can enter the claim reference that you want to look at or search through all of the claims being paid to you, then look in detail at one claim at a time.

Fig 7 - Claim Search Page

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 or 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 (Fig 8).

Fig 8 - Advanced Search Mode in Claim Enquiry

Here you have many more search fields to help you to identify the claim(s) that you want to look at.

Most of the fields relate directly to claim details, but the 'Active Only' tick box relates to the status of the claims to search for: 'Active Only' means that you only want to see claims that are currently live in payment. Only remove the tick from this box if you want to include old claims, perhaps to check the details of a former tenant.

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

### Searching Tips

The search is not case sensitive (you can enter Patel or PATEL or patel, etc. and they will all find the same results) but it will only find claims that match all the criteria entered. For example:

You are looking for the claim of your tenant, Phillip Jones, whose postcode is HA1 2QY. If you enter 'jones' in the surname field, 'phillip' in the forename field and 'HA1 2QT' in the postcode field, you will not find his claim. This is because although the name is correct, the postcode is not and the search must match on all fields.

Similarly, if you enter 'jones' in the surname field and 'philip' in the forename field, you will not find his claim because you have spelled Phillip incorrectly.

One way to avoid this problem is to use the wildcard character, which on the Landlord Portal is the %. You can use this anywhere in a search field and it will replace any number of characters, so to find Phillip Jones you might enter:

Surname = jones Forename = phil%ip

Or

Surname = jones Forename = p%

Both of the above will find Phillip Jones, but the second one will also find Peter, Paul, Penelope, etc. (if you have tenants of that name).

The best way to search varies according to what you are looking for: with more unusual surnames you may not need to enter any forename details, alternatively for a more common name you could also use some address details to narrow the results.

Another factor is how many claims are being paid to you: if numbers are low then it doesn't matter if they all get returned (you could do this by entering % in the Claim field) but if you are being paid for a lot of claims then the search will take a longer time to return them and the number may be unmanageable for you to look through.

If you are not entirely sure of the claim details then it is best to either avoid that search field or else use wildcards just in case, e.g. if entering Initials, always put a wildcard after the initial you enter, otherwise if the tenant has a middle name that you aren't aware of, you won't find their claim.

### Search Results

If you enter a claim reference in the single Claim Search but the search finds no claim of that reference that is being paid to you, the page shows 'No Data Found'. If the search is successful you are taken directly to the Claim Enquiry page for that claim (Fig 10).

If your Advanced Search finds no claims that match your search criteria and are being paid directly to you then the Search Results region displays 'No Data Found'.

When your Advanced Search is successful the matching claims are shown in the Search Results beneath the Search Criteria (Fig 9).

Fig 9 - Example of Advanced Search and Results

The screenshot shows the 'Landlord Services' portal interface. At the top right, there are links for 'Performance' and 'Log Off'. Below the header, there is a navigation menu with 'Landlord Services Home' and 'Claim Search'. The main content area is divided into two sections: 'Search Criteria' and 'Search Results'.

**Search Criteria:** This section contains several input fields for filtering search results:
 

- Claim %:** A text input field.
- Rent Reference:** A text input field.
- Active Only:** A checkbox that is currently checked.
- Surname:** A text input field.
- Forename:** A text input field.
- Initials:** A text input field.
- Title:** A dropdown menu with '(Any)' selected.
- Address:** A text input field.
- Postcode:** A text input field.

 Below these fields is a note: 'Note Use "\*" for wildcard search'. At the bottom of this section are 'Search' and 'Clear' buttons, and a 'Cancel' button on the right.

**Search Results:** This section displays a table with the following columns: 'Claim number', 'Name', 'Address', 'Period status', and 'Rent Reference'. The table contains three rows of results:

Claim number	Name	Address	Period status	Rent Reference
<a href="#">100001172</a>	Mr Colebi Leslie Rosen Al-Ghobry	3 Drayton Road, Northwood, Northgate, Northairns, BT1 1QJH	Active	2578230
<a href="#">280000173</a>	Miss Calvan Guandich-Thorne	Flat Number 215, 54 Potters Heron Avenue, Northgate, Northairns, BT2 5PQ	Active	
<a href="#">280018673</a>	Miss Abbey Pizzo	Flat Number 215, 50 Potters Heron Avenue, Northgate, Northairns, BT2 5PQ	Active	

If there are more matches than will fit on the page, a [Next](#) link appears at the bottom of the Search Results (Fig 9a). Click this to be taken to the next page of results.

Fig 9a - Bottom of Search Results showing [Next](#) page link

This screenshot shows the bottom portion of the search results table. It includes the last two rows of the table and the pagination controls at the bottom right.

<a href="#">280001172</a>	Miss Antonio Crawford Kulevich	Flat Number 201, 55 Potters Heron Avenue, Northgate, Northairns, BT2 5PQ	Active	
<a href="#">280009860</a>	Miss Aarti Ghav	Flat Number 215, 72 Potters Heron Avenue, Northgate, Northairns, BT2 5PQ	Active	

At the bottom right of the table, there is a pagination control showing '1 - 15' and a [Next](#) link with a circular arrow icon.

If the results are not what you wanted or there are too many for you to go through you can amend your search in the Search Criteria region and click the Search button again. The Search Results region refreshes to show your new search results.

To select a claim from the results to view in detail, click on the claim reference in the search results (this is blue and underlined). This takes you to the Claim Enquiry page (Fig 10).



## 4.2 Claim Enquiry Page

The Claim Enquiry Details page consists of 6 blocks or regions: Claim Search, Claim Summary, Change of Circumstances, Entitlements, Payments and Notes. What you can see and do in each of these regions is described below.

### **Claim Search**

This is the same as in section 4.1, here you can either enter another claim reference to change the claim that you are looking at, or you can click Advanced Search to search for another claim.

### **Claim Summary**

This region (Fig 10) contains a summary of the claim details:

**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)

**Period Status** - the Housing Benefit claim may be Active (live), Cancelled (ended), Expired (ended), Ineligible (claim refused) or Registered (claim not yet processed)

**Reason** - if the claim has been cancelled, this field shows the reason for the cancellation. If the claim payments have been suspended, the suspension reason is shown.

**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 rent account number (if they have one)

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

**Landlord Overpayment Outstanding** - the total sum of overpayments of Housing Benefit made to you (as opposed to the claimant or to another landlord) that the LA intends to recover

**Weekly Recovery Rate** - if there are overpayments (paid to you, the tenant or another landlord) being recovered from the ongoing HB payments then this is the weekly amount being reclaimed

**Next Payment** - the amount of the next payment due

**Next Payment Date** - when the next payment is due

Fig 10 - Claim Enquiry

<b>Claim Summary</b>			
Claim Number	100000563	Name	Mr Ann Mari Branes
Address	67 Gallaghers Court, Southwood, Northgate, Northshire, NT1 8JP		
Period Status	Active		
Suspended Date			
Rent Reference	0136921	Property Reference Number	0000184736
Landlord Overpayment Outstanding	Weekly Recovery Rate		
Next Payment	424.64	Next Payment Date	21/02/2011

## Change of Circumstances

Here you can send the LA details of any changes that you know about that might affect this Housing Benefit claim. This does not apply to annual rent and service charge increases. You can also see any previous changes that you or other members of your organisation (if you are a landlord with more than one user for the Landlord Portal) have previously reported.

Clicking the grey button in the top right hand corner of the Change of Circumstances region opens a new region called Report a Change (see Fig 11).

Fig 11 - Change of Circumstances region before any changes reported, the Report a Change form and the Change of Circumstances region showing a reported change.

The screenshot displays two parts of the interface. The top part is the 'Change of Circumstances' header with a 'Report Change in Circumstance' button. The middle part is the 'Report a Change' form, which includes a date picker for 'Date of Change', a dropdown menu for 'Type of Change', and a text area for 'Description of Change'. The bottom part shows a table with one row of data:

Date	Type	Description	User
17/10/2011	HOUSEHOLD	Tamara's eldest daughter, Maria, has moved out.	CHACK

When reporting a change the details to enter are:

**Date of Change** - enter the date of change, or click the calendar icon to the right of the field to select the date from a calendar.

**Type of Change** - choose the type of change from the list; don't worry if there isn't an exact match as you can give further details in the next field.

**Description of Change** - give details of the change here.

When you have finished entering the details press the Send button. A message appears to check that you are sure you want to send the message; click OK to send it or Cancel to not send it and be returned to the Change in Circumstances page.

If you click OK, the message is sent directly to the LA as an item of correspondence to be dealt with but will not automatically appear on the claim. To place a note on the claim immediately, see the Notes region below.

## Entitlements

This region (Fig 12) 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 LA.

If there are more entitlement records than fit in the region, 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.

Fig 12 - Entitlements region

<a href="#">Start Date</a>	<a href="#">End Date</a>	<a href="#">Amount</a>	<a href="#">Calculation Date</a>
28/09/2009	26/09/2010	116.90	18/05/2009
01/04/2009	27/09/2009	116.90	18/05/2009
01/09/2008	31/03/2009	111.28	18/05/2009
16/08/2008	31/08/2008	111.28	18/05/2009
01/04/2008	15/08/2008	0.00	18/05/2009

1 - 5 [Next](#)

### Payments

The Payments region (Fig 13) shows the payments that have been made to you on this claim.

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, 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.

Fig 13 - Payments region

<a href="#">Payment Date</a>	<a href="#">Amount</a>
22/07/2010	116.90
22/07/2010	467.60
21/07/2010	467.60
20/07/2010	467.60
30/06/2010	467.60

[Export to Excel](#)

1 - 5 [Next](#)

### Notes

The Notes region (Fig 15) can be used by you to make notes on the Housing Benefit claim that are visible to the LA staff and they can add notes that are visible to you. When you create a note the LA office is also notified that a note has been added to the claim, so that they can go and check the claim to see if any action needs to be taken.

Fig 15 - Notes region before any notes are created

<a href="#">Notes</a>	<a href="#">Send Note to LA</a>
No data found	

## Landlord Portal Service Level Agreement

To add a note to this claim click the Send Note to LA button. A box appears for you to type in the note (Fig 16); bear in mind that this may be read by anyone viewing the claim, including your tenant.

Fig 16 - Maintain Notepad page

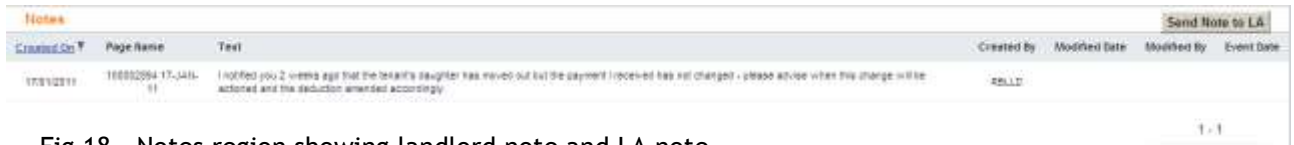


The screenshot shows a form titled "Send Note to LA". It contains a large text area for entering a note, a "Send" button at the bottom left, and a "Cancel" button at the bottom right.

When you have finished entering the details press the Send button. A message comes up to check that you are sure you want to send the note; click OK to send it or Cancel to not send it and be returned to the Maintain Notepad.

The note appears on the claim and on the Landlord Portal as soon as you save it (Fig 17). LA staff can add notes that you can view (Fig 18) directly to the claim.

Fig 17 - Notes region showing landlord note



The screenshot shows a table with the following columns: Created On, Page Name, Text, Created By, Modified Date, Modified By, and Event Date. A single row is visible with the following data:

Created On	Page Name	Text	Created By	Modified Date	Modified By	Event Date
17/01/2011	100002894 17-JAN-11	I notified you 2 weeks ago that the tenant's daughter has moved out but the payment I received has not changed - please advise when this change will be actioned and the deduction amended accordingly	RELLD			

At the bottom right of the table, there is a "Send Note to LA" button and a "1 - 1" indicator.

Fig 18 - Notes region showing landlord note and LA note



The screenshot shows a table with the following columns: Created On, Page Name, Text, Created By, Modified Date, Modified By, and Event Date. Two rows are visible:

Created On	Page Name	Text	Created By	Modified Date	Modified By	Event Date
17/01/2011	1	We are currently saving into this.	PRODUCT			
17/01/2011	100002894 17-JAN-11	I notified you 2 weeks ago that the tenant's daughter has moved out but the payment I received has not changed - please advise when this change will be actioned and the deduction amended accordingly	RELLD			

At the bottom right of the table, there is a "Send Note to LA" button and a "1 - 2" indicator.

### Leaving the Claim Enquiry page

When you want to change to a different page, e.g. switch from Claim Enquiry to Landlord Payments, click the [Landlord Services Home](#) link 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.

## 5 Using the Landlord Portal - Landlord Payments

The Landlord Payments page enables you to search for and see details of payments made to you and how the amounts were arrived at.

To do this, choose the [Click here for Landlord Payments](#) link from the Landlord Services Home page. This takes you to the Landlord Payments Search page (Fig 25) where you can enter details of the payment(s) that you want to review.

Fig 25 - Landlord Payments Search

The screenshot shows the 'Landlord Payments Search' interface. At the top, there's a header with 'Landlord Services' and a search icon. Below that, there are 'Preferences' and 'Log Off' buttons. The main content area has a breadcrumb trail: 'Landlord Services Home > Landlord Payments'. The search form is titled 'Landlord Payments Search' and includes the following fields:

- Claim:** A text input field.
- Rent Reference:** A text input field.
- Payments Since:** A date input field with a calendar icon.
- Payments To:** A date input field with a calendar icon.

Below the fields, there is a note: 'Note: Use \"%\" for wildcard search'. At the bottom of the form, there are 'Search' and 'Clear' buttons.

### Landlord Payments Search

You can enter search criteria in just one field or use a combination of fields to specify what you want to find. Every search field is optional but you must enter something in at least one field in order for the search to work.

The search fields are as follows:

**Claim** - here you can enter the full or part claim number using wildcards\* if necessary card; 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

\*The wildcard character of % can be used anywhere in the Claim and Rent Reference fields to replace any number of characters, e.g. if you enter Rent Reference = %3% you will find all claims that have been paid to you that have a rent reference containing a 3 anywhere in the reference. The Payments Since & To fields are date fields and will not accept the wildcard.

### Search Results

To execute your query click the Search button. The page refreshes to show your search results below the Landlord Payments Search region, in the Landlord Payments region (Fig 26).

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.

Fig 26 - Landlord Payments Search and Landlord Payments (search results)

The screenshot shows the 'Landlord Payments Search' interface. At the top, there's a breadcrumb 'Landlord Services Home > Landlord Payments'. Below that is the search form with the following fields: 'Claim' (value: 311093526), 'Rent Reference' (empty), 'Payments Since' (empty), and 'Payments To' (empty). A note says 'Note: Use "\*" for wildcard search'. There are 'Search' and 'Clear' buttons. Below the search form is the 'Landlord Payments' results section. It features a table with three columns: 'Payment Date', 'Method', and 'Amount'. The table contains five rows of data, each with a radio button in the first column. Below the table is an 'Export to Excel' link and a pagination control showing '1 - 5' and a 'Next' link with a right-pointing arrow.

Payment Date	Method	Amount
22/07/2010	CREDBACS	2,276.38
22/07/2010	CREDBACS	8,024.32
21/07/2010	CREDBACS	8,024.32
20/07/2010	CREDBACS	7,998.56
30/06/2010	CREDBACS	7,663.62

The columns of payment information are as follows:

**Payment Date** - the date that the payment was posted

**Method** - the payment method, e.g. CREDBACS, CREDBACSB 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 (Fig 27). The page refreshes and another region, Landlord Payment Transactions (Fig 28) opens beneath the Landlord Payments region.

Fig 27 - selecting a payment to view details

	22/07/2010	CREDBACS	8,024.32
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**Important note:** the payment transactions displayed are those for the search criteria that you entered, even if the total payment included amounts for other claims. So although the payment in Fig 27 is £8024.32, because the search (Fig 26) was for a single claim, the transactions shown in Fig 28 are restricted to that claim and only total £467.60. To see all of the transactions for a payment, don't enter any Claim or Rent Reference search criteria.

Fig 28 - Landlord Payment Transactions region

Claim Reference	Claimant	Address	Rent Reference	Start Date	End Date	Benefit	Adjustment	Total
<a href="#">311033525</a>	Mrs Dulcie Deirdre Bungay	Flat Number 014, 24 Potters Heron Avenue, Northgate, Northshire, NT2 5PJ	2141400	23/03/2010	19/05/2010	467.60	0.00	467.60

[Export to Excel](#)

1 - 1

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 transaction 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.

Most 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 [Total](#) and the payment transactions 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.

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

**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 in respect of the claim in that payment

## 6 Maintaining Users

Access to the Landlord Portal is by User Name and Password (see section 3 above). The LA will create all users for a landlord to use the Landlord Portal.

The LA administers resetting forgotten passwords, deciding on levels of access, additional users etc. The LA also retains access to all user maintenance.