



Landlord Portal User Guide

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Purpose of this guide

This guide is intended for Bracknell Landlords.

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

2 Introduction

The Landlord Portal allows online real time Access via a web Portal to the Benefits System, therefore the system, is only available when the Benefit system is up.

The Local Authority decides & configures access for each landlord. If you have any queries please email online.benefits@bracknell-forest.gov.uk. Please put Landlord Portal in the subject.

A username and initial password will be issued on application to each user landlord or landlord organisation.

Important note: Landlords are only ever able to see details of claims for which they are receiving direct payment of Housing Benefit or limited data for claims they are no longer the current payee.

The available functionality is summarised below:

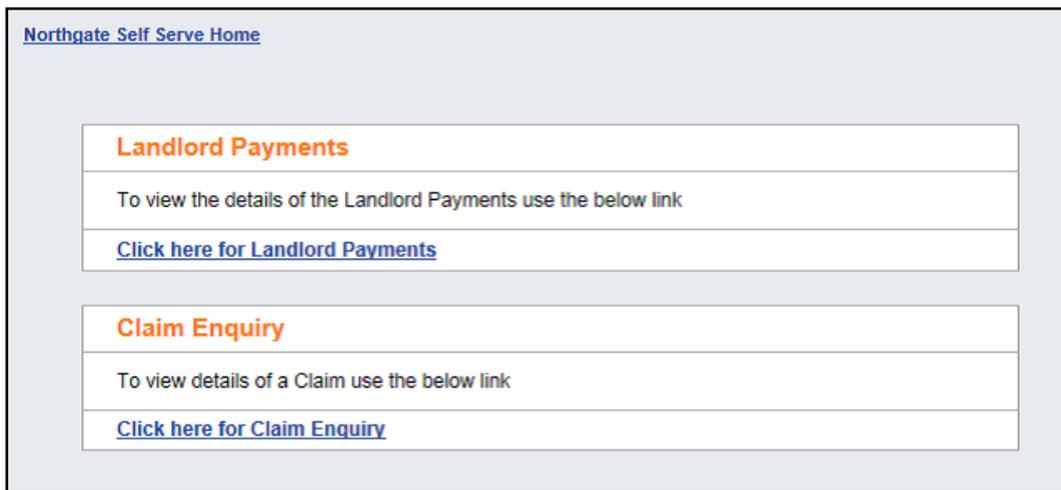
- **Claim Enquiry**
 - Search for one or many claims
 - Details of the current weekly Housing Benefit entitlement
 - Details of payments made
 - Link to inform the LA of a change in circumstances that may affect the claim
 - View change of circumstances previously notified to the LA
- **Landlord Payments**
 - 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:

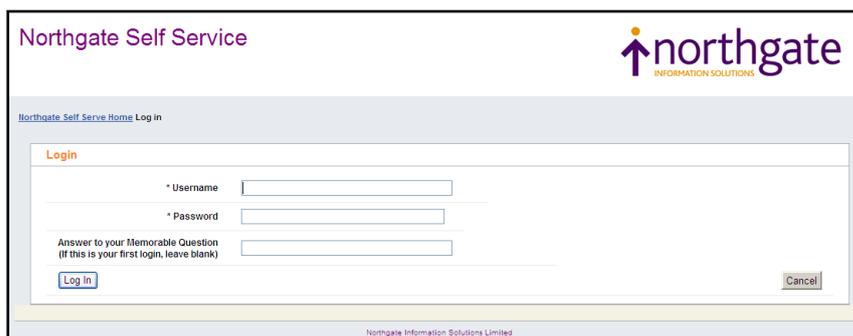
Claim Enquiry – select this to view claim details

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 have to email online.benefits@bracknell-forest.gov.uk

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

Northgate Self Serve Home Preferences

Preferences	
* Memorable Question	What football team did I play for in Nottingham
* Answer to Memorable Question	Forest
Email Address	collymore@hotmail.com
Confirm Email Address	collymore@hotmail.com
Mobile Phone	07777000000 x
Preferred Contact Method	<input checked="" type="radio"/> Email <input type="radio"/> Letter
New Password (leave blank if you don't want to change it)	
Re-type new password	
Save	Maintain Users Cancel

Northgate Public Services (UK) Ltd 2015

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 – **NB Do not change preferred communication method this should always be set to email**
- 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 Bracknell Landlord Self Service 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.

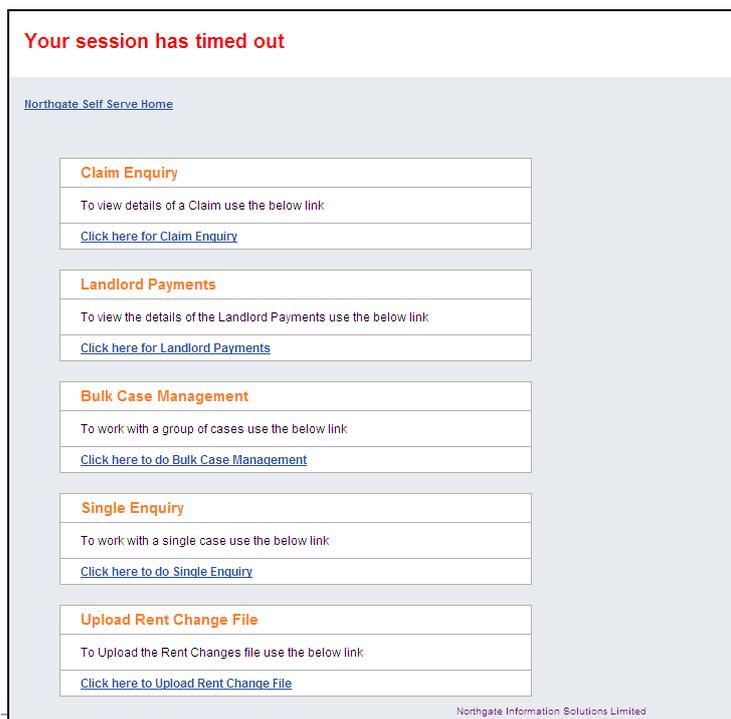
Automatic log out

The Portal administrator can set a time limit to automatically log out any user that has been idle for that long. If this is set and you exceed the idle time limit you will be logged out, so 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



3.3 Forgotten Username or Password

If you forget your username or password please email, please add Landlord Portal to the subject line.

online.benefits@bracknell-forest.gov.uk

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

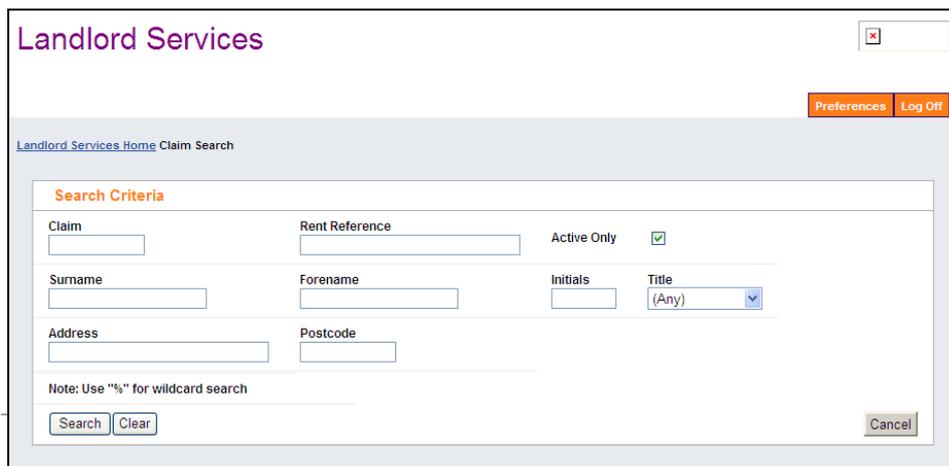


The screenshot shows the 'Landlord Services' web interface. At the top left is the logo 'Landlord Services' in purple. To the right is a search box with a red 'x' icon. Below the logo are two orange buttons: 'Preferences' and 'Log Off'. A breadcrumb trail reads 'Landlord Services Home > Claim Enquiry'. The main content area is titled 'Claim Search' and contains a 'Claim Reference' input field, a 'Search' button, and an 'Advanced Search' button.

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



The screenshot shows the 'Landlord Services' web interface in 'Advanced Search' mode. The breadcrumb trail is 'Landlord Services Home > Claim Search'. The main content area is titled 'Search Criteria' and contains several input fields: 'Claim', 'Rent Reference', 'Surname', 'Forename', 'Address', and 'Postcode'. There are also checkboxes for 'Active Only' (checked) and 'Initials'. A dropdown menu for 'Title' is set to '(Any)'. A note at the bottom left says 'Note: Use "%" for wildcard search'. At the bottom are 'Search', 'Clear', and 'Cancel' buttons.

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

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.

If you deselect the "Active Only"

You will then be presented with all the claims that currently still have your payment details linked to the claim even though current status of the claim may not be active.

If you also deselect the "Current Only" tick box

You will be presented with details of past claims that no longer have your payment details linked to the claim (**however the information you will be able to access will be limited to the payments you have received in the past**)

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.

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' web application. At the top, there is a navigation bar with 'Landlord Services Home' and 'Claim Search' links, and 'Preferences' and 'Log Off' buttons. The main content area is divided into two sections: 'Search Criteria' and 'Search Results'.

Search Criteria: This section contains several input fields: 'Claim' (with a '%' wildcard), 'Rent Reference', 'Surname', 'Forename', 'Initials', 'Title' (with a dropdown menu set to '(Any)'), 'Address', and 'Postcode'. There is also an 'Active Only' checkbox which is checked. A note below the fields states: 'Note: Use "%" for wildcard search'. At the bottom of this section are 'Search', 'Clear', and 'Cancel' buttons.

Search Results: This section displays a table with the following data:

Claim number	Name	Address	Period status	Rent Reference
100002028	Mr Collette Leslie Robert Al-Ghoimy	3 Drayton Road, Northwood, Northgate, Northshire, NT1 1QM	Active	2579230
396009178	Miss Cailean Quantick-Thorne	Flat Number 016, 64 Potters Heron Avenue, Northgate, Northshire, NT2 5PJ	Active	
396010075	Miss Abbey Pilton	Flat Number 019, 98 Potters Heron Avenue, Northgate, Northshire, NT2 5PJ	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 contains two rows of data:

396010133	Mrs Antonio Crawford Kekewich	Flat Number 001, 85 Potters Heron Avenue, Northgate, Northshire, NT2 5PJ	Active	
396009865	Mrs Aarti Graw	Flat Number 015, 72 Potters Heron Avenue, Northgate, Northshire, NT2 5PJ	Active	

Below the table, there is a pagination control showing '1 - 15' and a 'Next' link with a right-pointing arrow.

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)

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

Claim Summary			
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 Bracknell Council details of any changes that you know about that might affect this Housing Benefit claim. 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 the 'Change of Circumstances' interface. At the top, there is a header 'Change of Circumstances' and a button 'Report Change in Circumstance'. Below this, a 'Report a Change' form is visible, containing the following fields:

- Date of Change:** A text input field with a calendar icon to its right.
- Type of Change:** A dropdown menu.
- Description of Change:** A large text area for entering details.
- Buttons:** 'Send' and 'Cancel' buttons are located at the bottom of the form.

Below the form, a table shows a list of reported changes:

Date	Type	Description	User
17/01/2011	HOUSEHOLD	Tenant's eldest daughter, Marie, has moved out.	CHALK

At the bottom of the table, there is a page indicator '1 - 1'.

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.

NB You should not use this to request details of a claimant you will not receive a response. This facility is to report a change in circumstances only.

If you click OK, the message is sent directly to the Bracknell Council 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



Start Date	End Date	Amount	Calculation Date
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
01/04/2006	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

Payment Date	Amount
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](#)

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

Landlord Services

Preferences Log Off

[Landlord Services Home](#) Landlord Payments

Landlord Payments Search

Claim Rent Reference

Payments Since Payments To

Note: Use "%" for wildcard search

Search Clear

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. (NB you must enter the day after the last day you wish to search).

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)

Landlord Services Home Landlord Payments

Landlord Payments Search

Claim Rent Reference

Payments Since Payments To

Note: Use "%" for wildcard search

Landlord Payments

Payment Date	Method	Amount
<input type="radio"/> 22/07/2010	CREDBACS	2,276.38
<input type="radio"/> 22/07/2010	CREDBACS	8,024.32
<input type="radio"/> 21/07/2010	CREDBACS	8,024.32
<input type="radio"/> 20/07/2010	CREDBACS	7,998.56
<input type="radio"/> 30/06/2010	CREDBACS	7,863.92

[Export to Excel](#)

1 - 5 [Next](#)

The columns of payment information are as follows:

Payment Date – the date that the payment was posted

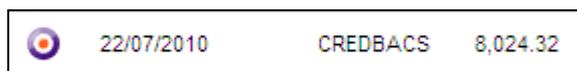
Method – the payment method, e.g. CREDBACS is a payment by BACS, CREDCHX is a payment by cheque

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



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

Landlord Payment Transactions									
Claim Reference ▲	Claimant	Address	Rent Reference	Start Date	End Date	Benefit	Adjustment	Total	
311093526	Mrs Dulcie Deirdre Bungay	Flat Number 014, 24 Potters Heron Avenue, Northgate, Northshire, NT2 5PJ	2141400	23/08/2010	19/09/2010	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