

## Universal Credit Landlord Portal User Access Control

The Universal Credit Landlord Portal allows you to verify a tenants rent and apply for an Alternative Payment Arrangement (APA).

We have now introduced a feature which will allow landlords to manage their own user access internally.

The full guidance is set out below including screens of each stage of the process.

### Functionality in Brief

- View users & user permissions
- Add users (NB – this is existing functionality)
- Edit user permissions
- Reset mobile phone numbers (NB this allows an update to the number to be made)
- Deactivate users
- “View Payments” – this enables a user to search for and view payment information within the Landlord Portal
- “Export Payments” – this enables a user to search for and download a CSV file containing payment information.

### Who Can Manage User Details?

Only users who have the “**Manage Users**” role (see p4, 5 & 6) are able to manage other users details. Note: These users will not be able to make changes to their own account. We therefore, recommend that at least 2 people per organisation have this user role enabled.

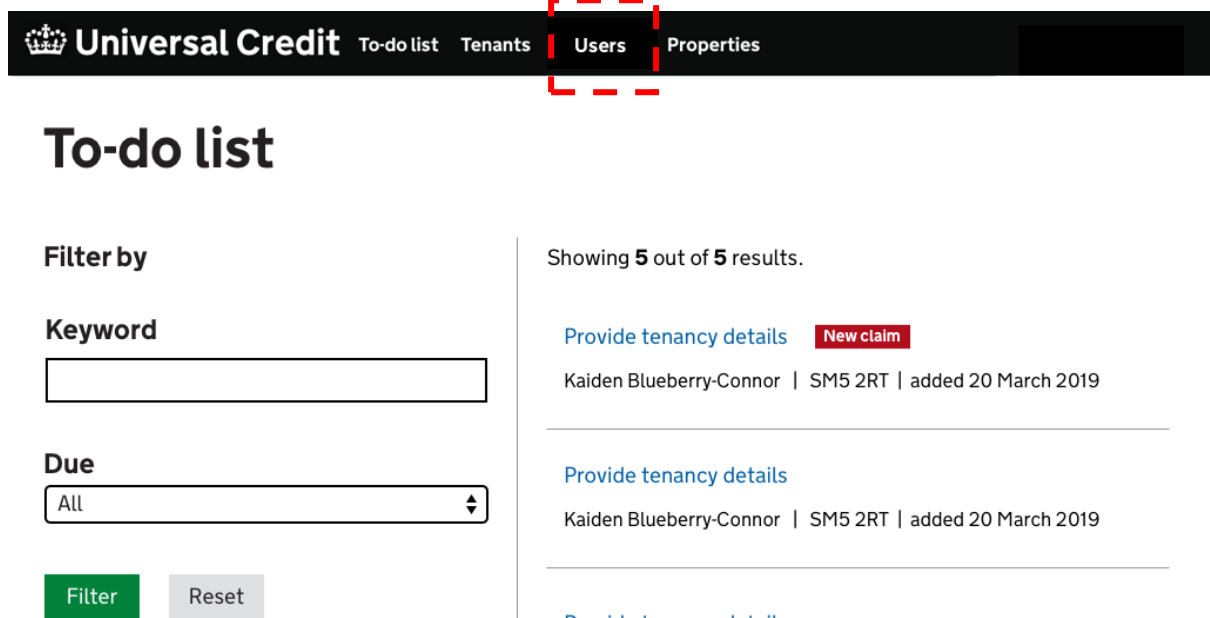
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*Note: As a landlord you are responsible for controlling access to the Portal, as users will have access to details of UC claimants. You should regularly review who requires access to the Portal and deactivate any unrequired accounts or amend user permissions as required. Please also note that user accounts will be automatically deactivated if there is no login for 90 days.*

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## Making Changes

All changes are made via the **Users** tab at the top of the screen



The screenshot shows the top navigation bar of the Universal Credit system. The 'Users' tab is highlighted with a red dashed box. Below the navigation bar, the 'To-do list' section is visible. On the left, there are filter options for 'Keyword' and 'Due'. The 'Keyword' field is empty, and the 'Due' dropdown is set to 'All'. Below these filters are 'Filter' and 'Reset' buttons. On the right, the results section shows 'Showing 5 out of 5 results.' and two entries, each with a 'Provide tenancy details' link and a 'New claim' badge. The entries are for 'Kaiden Blueberry-Connor | SM5 2RT | added 20 March 2019'.

**Universal Credit** To-do list Tenants **Users** Properties

### To-do list

**Filter by**

**Keyword**

**Due**

All

**Filter** **Reset**

Showing **5** out of **5** results.

[Provide tenancy details](#) **New claim**

Kaiden Blueberry-Connor | SM5 2RT | added 20 March 2019

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[Provide tenancy details](#)

Kaiden Blueberry-Connor | SM5 2RT | added 20 March 2019

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Selecting this will take you to the **View Users** screen

# View Users & User Permissions

This is the first screen visible after selecting the **Users** tab

The screenshot shows the 'Users' management page in the Universal Credit system. At the top, there is a navigation bar with the Universal Credit logo and tabs for 'To-do list', 'Tenants', 'Users', and 'Properties'. The 'Users' tab is selected. In the top right corner, the user 'Sam Wise' is logged in, with a 'Sign out' link. Below the navigation bar, a 'BETA' notice states: 'This is a new service – your feedback will help us to improve it.' The main heading is 'Users'. Below this, there is a grey button labeled 'Add user'. A table lists the current users with columns for 'Name', 'Email', and 'What the user can do'. The table contains three entries: Sam Dungee, Sam Wise, and Sarah Smith. At the bottom right of the page, there is a small royal coat of arms logo.

Name ▲	Email	What the user can do
Sam Dungee	sam.dungee@example.com	Provide tenancy details
Sam Wise	southwark@example.com	Bulk update housing costs, Add or remove properties, Manage users, Provide tenancy details
Sarah Smith	southie.council@example.com	Add or remove properties, Manage users, Provide tenancy details

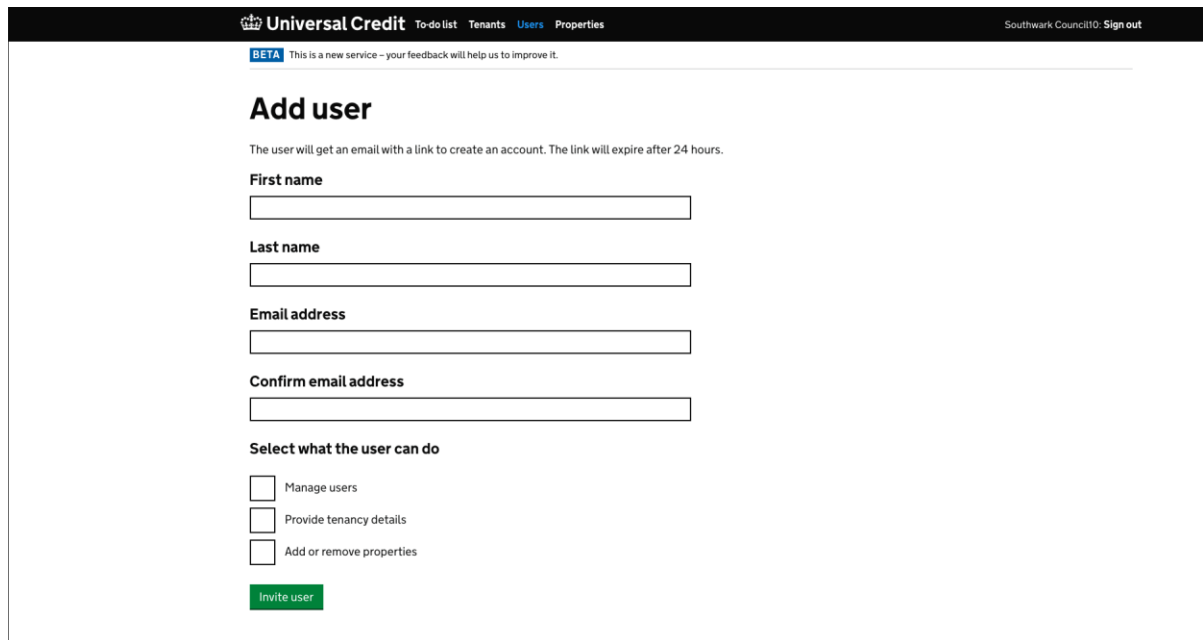
All users with active accounts will be visible, this screen will display user name, e-mail address and **permissions**.

You will also be able to create users via the grey **Add User** button.

Selecting a user's name will enable changes to be made to that users profile.

## Add Users

This is existing functionality, however, this is now managed as part of the wider **User** tab



The screenshot shows the 'Add user' form in the Universal Credit system. The page header includes 'Universal Credit' with navigation links for 'To-do list', 'Tenants', 'Users', and 'Properties'. A 'Sign out' link is also present. A beta notice states: 'BETA This is a new service - your feedback will help us to improve it.' The form title is 'Add user', followed by a note: 'The user will get an email with a link to create an account. The link will expire after 24 hours.' The form contains four text input fields: 'First name', 'Last name', 'Email address', and 'Confirm email address'. Below these is a section titled 'Select what the user can do' with three checkboxes: 'Manage users', 'Provide tenancy details', and 'Add or remove properties'. A green 'Invite user' button is at the bottom.

To create a new user:

1. Complete all 4 text fields (First Name, Last Name, Email Address & Confirm Email address)
2. Select the required user permissions
3. Select "Invite User"

This will issue an e-mail to the new user and allow them to login, and the process of adding a user is complete.

# Edit User

Selecting a user's name from the **Users** screen will present the following screen.

The screenshot shows the 'Edit John Smith' page in the Universal Credit system. At the top, there is a navigation bar with the Universal Credit logo and links for 'To-do list', 'Tenants', 'Users', and 'Properties'. On the right side of the navigation bar, it says 'CHESHIRE WEST & CHESTER COUNCIL MANAGED FORHOUSING. Sign out'. Below the navigation bar, there is a 'BETA' notice: 'This is a new service - your feedback will help us to improve it.' The main heading is 'Edit John Smith'. Below this, there is a section titled 'User contact details' with a table showing 'Email address' as 'john.smith@aol.com' and 'Mobile number' as '06789123121'. There is a 'Reset mobile number' section with a description: 'Resetting will remove the current mobile number, and this user will need to enter a new number the next time they log in.' and a 'Reset' button. Below that is a 'Select what the user can do' section with three checked checkboxes: 'Manage users', 'Provide tenancy details', and 'Add or remove properties'. There is a 'Done' button and a 'Deactivate user' link.

**Universal Credit** To-do list Tenants Users Properties CHESHIRE WEST & CHESTER COUNCIL MANAGED FORHOUSING. Sign out

**BETA** This is a new service - your feedback will help us to improve it.

## Edit John Smith

**User contact details**

Email address	john.smith@aol.com
Mobile number	06789123121

**Reset mobile number**  
Resetting will remove the current mobile number, and this user will need to enter a new number the next time they log in.

Reset

**Select what the user can do**

- Manage users
- Provide tenancy details
- Add or remove properties

Done

[Deactivate user](#)

From here it is possible to make 3 types of changes:

1. **Edit User Permissions**
2. **Reset / Update Mobile Phone Number**
3. **Deactivate User**

## Edit User Permissions

To remove user permissions, uncheck the relevant boxes in the “Select what the user can do” section.

To add user permissions, check the relevant boxes in the “Select what the user can do” section.

The screenshot shows the 'Edit John Smith' page in the Universal Credit system. At the top, there is a navigation bar with 'Universal Credit' and links for 'To-do list', 'Tenants', 'Users', and 'Properties'. On the right, it says 'CHESHIRE WEST & CHESTER COUNCIL MANAGED FORHOUSING: Sign out'. Below the navigation bar, there is a 'BETA' notice: 'This is a new service – your feedback will help us to improve it.' The main heading is 'Edit John Smith'. Underneath, there is a section for 'User contact details' with the following information: Email address: john.smith@aol.com, Mobile number: 06789123121. Below this is a 'Reset mobile number' section with a warning: 'Resetting will remove the current mobile number, and this user will need to enter a new number the next time they log in.' There is a 'Reset' button. The 'Select what the user can do' section is highlighted with a red dashed border and contains three checked options: 'Manage users', 'Provide tenancy details', and 'Add or remove properties'. There is a 'Done' button at the bottom of this section. Below the 'Done' button is a link: 'Deactivate user'.

**Universal Credit** To-do list Tenants Users Properties CHESHIRE WEST & CHESTER COUNCIL MANAGED FORHOUSING: Sign out

**BETA** This is a new service – your feedback will help us to improve it.

### Edit John Smith

**User contact details**

Email address **john.smith@aol.com**  
Mobile number **06789123121**

**Reset mobile number**  
Resetting will remove the current mobile number, and this user will need to enter a new number the next time they log in.

Reset

**Select what the user can do**

- Manage users
- Provide tenancy details
- Add or remove properties

Done

[Deactivate user](#)

Once any changes have been made, select **Done** to complete the change.

# Reset Mobile Phone Numbers

This allows an individual user to update their mobile phone number, and must be done in 2 stages:

1. Reset a user's mobile phone number
2. User logs into Portal and enters a new mobile phone number

## Reset Mobile Phone Numbers Stage 1 – Resetting a mobile phone number

**Universal Credit** To-do list Tenants Users Properties CHESHIRE WEST & CHESTER COUNCIL MANAGED FORHOUSING. Sign out

**BETA** This is a new service – your feedback will help us to improve it.

### Edit John Smith

**User contact details**

Email address john.smith@aol.com  
Mobile number 06789123121

**Reset mobile number**  
Resetting will remove the current mobile number, and this user will need to enter a new number the next time they log in.

[Reset](#)

**Select what the user can do**

- Manage users
- Provide tenancy details
- Add or remove properties

[Done](#)

[Deactivate user](#)

Select the **Reset** button

The following screen will be presented

**Universal Credit** To-do list Tenants Users Properties Southwark Council LTD Sign out

**BETA** This is a new service – your feedback will help us to improve it.

### Reset John Smith's mobile number

Do you want to reset this user's mobile number?

Yes, reset the number  No, keep the current mobile number

[Done](#)

To change the number, select the **Yes, reset the number** radio button and then select **Done**.

Once the number has been reset, the following information about the user's phone number will be visible in the **Edit User** screen. This will remain visible until the user logs into the portal and inputs a new mobile phone number.

**Universal Credit** To-do list Tenants Users Properties Southwark Council10: Sign out

BETA This is a new service – your feedback will help us to improve it.

## Edit John Smith

User contact details

Email address john.smith@aol.com

Mobile number Reset request has been made

Select what the user can do

- Manage users
- Provide tenancy details
- Add or remove properties

Done

[Deactivate user](#)

## Reset Mobile Phone Numbers Stage 2 – User Logon & Input of New Number

The user must:

1. Log off the Portal (if they have not already done so)
2. Log onto the Portal again.

This will prompt the user to enter a new mobile phone number

GOV.UK Landlord portal

BETA This is a new service – your feedback will help us to improve it.

## Enter a phone number

We'll send you a text message with an access code each time you sign in to your account.

Mobile phone number

We'll always send access codes to this number.

Continue

The user must enter the new mobile phone number and select the **Continue** button.

**Note that if you are transferring a number between 2 users, you must reset both the old user of the number, and the new user, before the new user can input the new number.**



## Deactivate users

To deactivate a user, select the **Deactivate user** button at the bottom of the screen

The screenshot shows the 'Edit John Smith' page in the Universal Credit system. At the top, there is a navigation bar with 'Universal Credit' and links for 'To-do list', 'Tenants', 'Users', and 'Properties'. A 'Sign out' link is also present. Below the navigation bar, a 'BETA' notice states: 'This is a new service - your feedback will help us to improve it.' The main heading is 'Edit John Smith'. Underneath, there is a section for 'User contact details' with the following information: Email address: john.smith@aol.com, Mobile number: 06789123121. Below this is a 'Reset mobile number' section with a description: 'Resetting will remove the current mobile number, and this user will need to enter a new number the next time they log in.' and a 'Reset' button. The 'Select what the user can do' section has three checked checkboxes: 'Manage users', 'Provide tenancy details', and 'Add or remove properties'. At the bottom, there is a green 'Done' button and a blue 'Deactivate user' link, which is highlighted with a red dashed box.

This will load the following screen

The screenshot shows the 'Deactivate John Smith' confirmation dialog. The heading is 'Deactivate John Smith'. The question is 'Do you want to deactivate this user?'. There are two radio buttons: 'Yes, deactivate the user' (which is selected) and 'No, keep the user active'. Below the radio buttons is a green 'Done' button, which is highlighted with a red dashed box. The footer of the page contains 'Privacy Cookies', 'OGL All content is available under the Open Government Licence v3.0, except where otherwise stated', and the Royal Coat of Arms with '© Crown copyright'.

To deactivate the user, select the **Yes, deactivate the user** radio button and then select **Done**.

**NB** – User Accounts that are not logged onto after 90 days will automatically be deactivated.

# Accessing Payment Reconciliation Information: Portal User Management

Access to tenant payment information is restricted to users with the following user roles:

- “View Payments” – this enables a user to search for and view payment information within the Landlord Portal
- “Export Payments” – this enables a user to search for and download a CSV file containing payment information

These user roles can be allocated and managed by any of your users who currently have the “Manage Users” user role allocated; this will normally be your Primary and Deputy Primary Users.

The relevant user roles are managed by clicking on the “Users” tab in the portal.

**Universal Credit** To-do list Tenants Users Properties

## To-do list

Filter by

Keyword

Showing 5 out of 5 results.

[Provide tenancy details](#) **New claim**

Kaiden Blueberry-Connor | SM5 2RT | added 20 March 2019

Select the user that you wish to allocate (or remove the user role(s) from, and the following screen will be displayed:

### Select what the user can do

- Manage users
- Provide tenancy details
- Add or remove properties
- View payments
- Export payments

[Done](#)

[Deactivate user](#)

The highlighted user roles control access to payment reconciliation information.

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**Note:** *It is your responsibility to control & manage who has access to tenant payment information*

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## Q&A:

### **How do I change an e-mail address?**

You should deactivate the old user account and add a **New User** with the new e-mail address.

### **How do I change a user's name?**

You should deactivate the old user account and add a **New User** with the new name.

### **Is there any way to reactivate a user?**

No. A new user with the same e-mail address and name can be recreated after the original account has been deactivated.

### **A member of staff is going on long term leave, how can I temporarily remove access to the portal**

You should deactivate the user, and then re-invite as a new user upon their return to work.

### **Can I view Deactivated Users?**

Deactivated users will not be visible.

### **Can I manage my own user permissions?**

No, organisations should ensure that more than one person has the "Manage Your Organisations Users" user role.

### **A user is leaving my organisation, do I need to reset the mobile phone number before deactivating it to allow the number to be reassigned?**

No, deactivating the user will automatically "free up" the number, allowing it to be reassigned.

### **My organisations e-mail suffix (i.e. the part after the @ on an e-mail address) is changing, what should I do?**

Please contact your Partnership Manager for support.

### **Can I change a user's e-mail suffix to something different to my own?**

No, this will generate an error as all e-mail suffixes should be the same. If you want to change your organisation's email suffix, please contact your Partnership Manager.

### **What forms & authorisation should I use to manage changes to my users?**

Each individual organisation is responsible for the appropriate management of permissions & access for their own users, including who authorises relevant permissions.