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 (<u>NB </u>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: <u>These users will not be able to make changes to their own account</u>. We therefore, recommend that at least 2 people per organisation have this user role enabled.
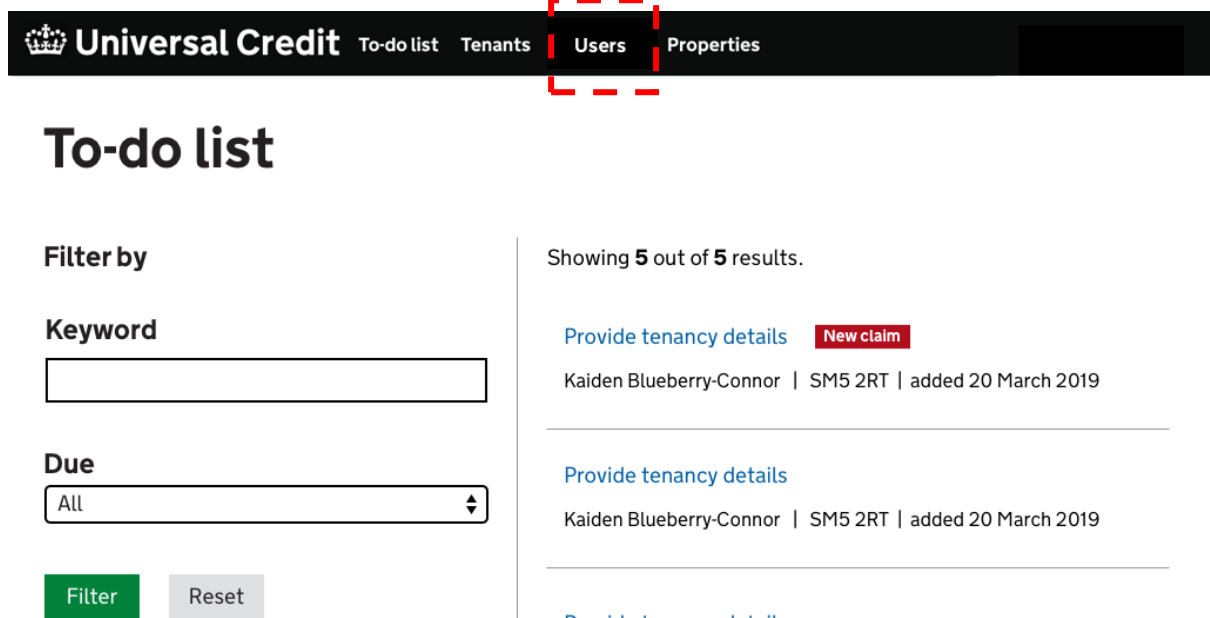

Note: As a landlord you are responsible for controlling access to the Portal, as users will have access to details of UC claimants. You should regularly review who requires access to the Portal and deactivate any unrequired accounts or amend user permissions as required. Please also note that user accounts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

Making Changes

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

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

View Users & User Permissions

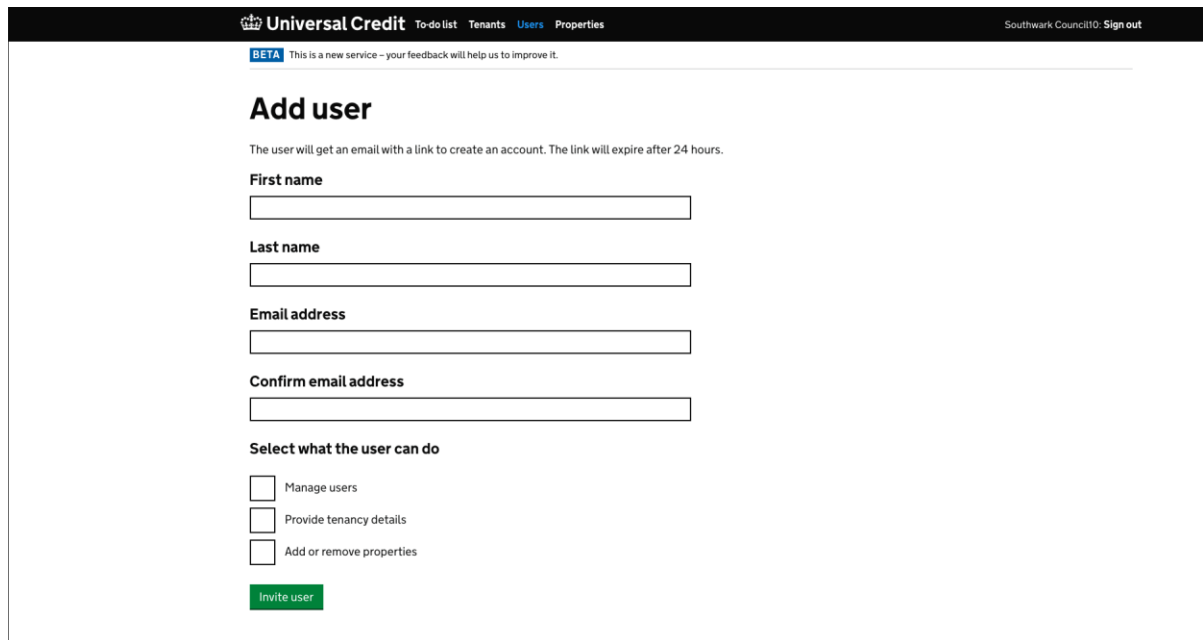This is the first screen visible after selecting the **Users** tab

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

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.

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.

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

Select the **Reset** button

The following screen will be presented

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.

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

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

This will load the following screen

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.

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

The highlighted user roles control access to payment reconciliation information.

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.