

Landlord Self Serve User Guide



Shepway District Council - Landlord Self Serve



[Shepway District Council Self Serve Home](#)

Landlord Payments

To view the details of the Landlord Payments use the below link

[Click here for Landlord Payments](#)

Claim Enquiry

To view details of a Claim use the below link

[Click here for Claim Enquiry](#)

Introduction

Shepway District Council Landlord Self Serve Portal allows Landlords and Agents to view details of claims for which they are receiving direct payment of Housing Benefit.

Providing payments and claim entitlement details for individual claims and providing a facility to download all payments on a payment schedule.

The available functionality is summarised below:

- **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
- Export payment information for import into landlord databases

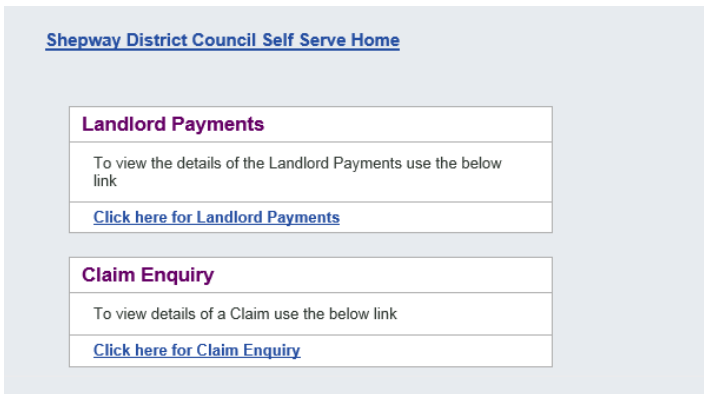
- **Claim Enquiry**

- Search for one or many claims
- Details of the current weekly Housing Benefit entitlement
- Details of payments made
- Link to inform Shepway District Council of a change in circumstances that may affect the claim
- View change of circumstances previously notified to Shepway District Council

Step 1 – Opening Landlord Self Serve Portal

Click on the link - <http://landlord.shepway.gov.uk/selfserve>

Once you have clicked on the link you will be taken to this page:



There are currently 2 options available:

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

Claim Enquiry – select this to view claim details

Make your selection by clicking on the blue hyperlinks available under each heading. A Login Page will then be displayed.

Step 2 – Logging in and changing Preferences

Enter your username, password and the answer to your memorable question (once set – see first login text below).

Login

* Username

* Password

Answer to your Memorable Question
(if this is your first login, leave blank)

You have five attempts to log in: after five incorrect attempts your account is locked and you will need to email the Council to unlock it.

First Login

The first time you log into Shepway District Council Landlord Self Serve Portal you are taken to the 'First Login' page where you must change your password and also provide a memorable question and answer.

Shepway District Council Self Serve Home First Login

Login

* User Name 1035

* User_ID: Do not change 1035 x

* Re-enter current password

* Choose a new password

* Re-type new password

* Type in a memorable question
(you will be asked for the answer whenever you log in)

* Type in the answer to your memorable question

After the first login you can change your password and memorable question/answer using the Preferences page by clicking on the tab 'preferences' in the top right hand corner.

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 Self Serve Portal but can be viewed by Shepway District Council
- Change mobile phone number – this is not used by the Landlord Self Serve Portal but can be viewed by Shepway District Council
- Change preferred communication method – this should always be set to Letter
- Change Password – changes your Landlord Self Serve Portal password

Shepway District Council Self Serve Home Preferences

Preferences

* Memorable Question

* Answer to Memorable Question

Email Address

Confirm Email Address

Mobile Phone

Please leave as 'Letter' Email
 Letter

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

Re-type new password

Current details can be amended by overtyping the existing details. To change your password, type your new password in both boxes. 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.

Step 3 – Using the Landlord Self Serve 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 notify a change of circumstances to Shepway District Council.

Two types of claim search

When you choose the Claim Enquiry link you are directed to the Claim Search page so that you can choose a claim to view. 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.

The screenshot shows the 'Claim Search' interface. At the top left, there is a breadcrumb link 'Landlord Services Home Claim Enquiry'. Below it is a search bar with the text 'Claim Search' in orange. Underneath the search bar, there is a 'Claim Reference' input field, a 'Search' button, and an 'Advanced Search' button.

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

Advanced Search Mode in Claim Enquiry:

The screenshot shows the 'Advanced Search' interface. At the top left, there is a breadcrumb link 'Landlord Services Home Claim Search'. Below it is a section titled 'Search Criteria'. This section contains several input fields: 'Claim', 'Rent Reference', 'Surname', 'Forename', 'Address', and 'Postcode'. There is also an 'Active Only' checkbox which is checked. Below the input fields, there is a note: 'Note: Use "%" for wildcard search'. At the bottom of the search criteria section, there are 'Search' and 'Clear' buttons. To the right of the search criteria section, there is a 'Cancel' button.

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 Self Serve 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 have a number of claims in payment 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 your search finds no claims that are being paid to you, the page shows ‘No Data Found’. You may then need to change the search criteria.

If the Single Claim Search is successful you are taken directly to the Claim Enquiry page for that claim – see Claim Enquiry Page section below.

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

The screenshot shows the 'Landlord Services' portal. At the top, there's a navigation bar with 'Landlord Services Home' and 'Claim Search'. Below this is a 'Search Criteria' section with several input fields: 'Claim' (containing '%'), 'Rent Reference', 'Surname', 'Forename', 'Initials', 'Title' (set to '(Any)'), 'Address', and 'Postcode'. There's a checkbox for 'Active Only' which is checked. A note below the fields says 'Note: Use "%" for wildcard search'. At the bottom of the search criteria section are 'Search', 'Clear', and 'Cancel' buttons. Below the search criteria is a 'Search Results' section containing a table with the following data:

Claim number	Name	Address	Period status	Rent Reference
100002028	Mr Collette Leslie Robert Al-Gholmy	3 Drayton Road, Northwood, Northgate, Northshire, NT1 1QM	Active	2579230
386008178	Miss Cailean Quantick-Thorne	Flat Number 016, 64 Potters Heron Avenue, Northgate, Northshire, NT2 5PJ	Active	
386010075	Miss Abbey Pitton	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. Click this to be taken to the next page of results.

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.

Claim Enquiry Page

The Claim Enquiry Details page consists of 5 blocks or regions: Claim Search, Claim Summary, Change of Circumstances, Entitlements and Payments. (Notes in this area are not used). What you can see and do in each of these regions is described below.

Claim Search- 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 contains a summary of the claim details:

Claim Summary			
Claim Number	10000563	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

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, Cancelled, Expired, 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 Shepway District Council; if so, the date they are suspended from shows here

Property Reference Number – the number that the property is known by at Shepway District Council

Landlord Overpayment Outstanding – the total sum of overpayments of Housing Benefit made to you (as opposed to the claimant or to another landlord) that Shepway District Council intends to recover

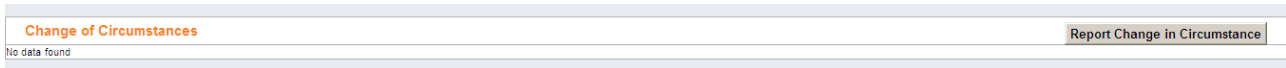
Weekly Recovery Rate – if there are overpayments (paid to you, the tenant or another landlord) being recovered from the ongoing HB payments then this is the weekly amount being reclaimed

Next Payment – the amount of the next payment due

Next Payment Date – when the next payment is due

Change of Circumstances

Here you can send Shepway District Council details of any changes that you know about that might affect this Housing Benefit claim. You can also see any previous changes that have been 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’.



When reporting a change the details to enter are the date of the change, the type of change and the description of the change. The message is then sent directly to Shepway District Council as an item of correspondence to be dealt with but will not automatically appear on the claim.

The 'Report a Change' form includes a date picker for 'Date of Change', a dropdown menu for 'Type of Change', and a text area for 'Description of Change'. There are 'Send' and 'Cancel' buttons at the bottom.

Entitlements

This region 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 Shepway District Council.

<u>Start Date</u>	<u>End Date</u>	<u>Amount</u>	<u>Calculation Date</u>
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](#) ▶

All of the column headings are blue and underlined which means that you can sort all of the information by that column.

Payments

The Payments region shows the payments that have been made to you on this claim. You can click the [Export to Excel](#) link to export all payment records into a spreadsheet or you can save the spreadsheet to your own PC or network, but it will not be updated as further payments are made.

<u>Payment Date</u>	<u>Amount</u>
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](#)

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Leaving the Claim Enquiry page

When you want to change to a different page click [Landlord Services Home](#) link to return to the Home page and make your next selection from there.

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. On the homepage choose the link ‘click here for Landlord Payments’, this takes you to the Landlord Payments Search page where you can enter details of the payment(s) that you want to review.

Landlord Services Home Landlord Payments

Landlord Payments Search

Claim Rent Reference

Payments Since Payments To

Note: Use "%" for wildcard search

You can enter search criteria in just one field or use a combination of fields to specify what you want to find. To execute your query click the Search button.

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
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	7,663.92

[Export to Excel](#)

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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

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

Landlord Payment Transactions

Claim Reference	Claimant	Address	Rent Reference	Start Date	End Date	Benefit	Adjustment	Total
311093526	Mrs Dulcie Deirdre Burgoy	Flat Number 014, 24 Potters Heron Avenue, Northgate, Northshire, NT2 5FJ	2141400	23/08/2010	19/09/2010	487.60	0.00	487.60

[Export to Excel](#)

1 - 1

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. To see all of the transactions for a payment, don't enter any Claim or Rent Reference search criteria.

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

Step 5 – Logging out

Manual log out: When you have finished using Shepway District Council Landlord Self Serve Portal you should log out. Do this by clicking on the Log Off button next to the Preferences button.

Automatic log out: If you exceed the idle time limit the portal administrator has set, you will be logged out. When you return to your portal session and try to do something you will be returned to the common home page with a message telling you that your session has been ended.