

**Interactive Portal for
Landlords and Residents:
Instructions for use**

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Interactive Portal for Landlords and Residents – Instructions for use

Our Interactive Portal for Landlords and Residents ('the portal') provides our customers with direct access to their electronic case records.

Customers will be able to see the status of their case(s) with the Ombudsman, receive and respond to messages from their caseworker, and upload documentary evidence directly onto our casework management system.

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Getting started – logging in

Prior to our activation meeting, we will create your portal account using the email address you have provided for your lead (administrator) user. We will then send you an email advising you to set your password. Please click on the link (or copy it into your browser's address bar) in that email and set your password.

1. Go to <https://portal.housing-ombudsman.org.uk>
2. Enter your email address as your username and select 'Continue'.

3. If this is your first login as a landlord administrator user, please select 'Forgot your password?', enter your email address again, and click 'Send instructions'.

You will then receive an email with a link which you can click on in order to reset your password. After you have reset your password, you will be returned to the Login page shown above.

- N.B. If you have not received an email within a few minutes, check your spam / junk mail folder. If you still have not received it, please contact us.

4. Enter your password and click 'Login'.

If you have forgotten your password, click 'Forgot password', enter your email address again and click 'Send instructions'.

You will then receive an email with a link which you can click on in order to

reset your password.

- N.B. If you have not received an email within a few minutes, check your spam / junk mail folder. If you still have not received it, please contact us.

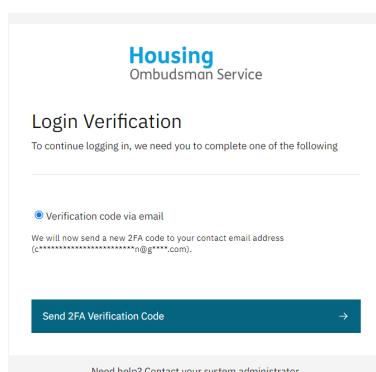
After you have reset your password, you will be returned to the Login page shown above.

If you experience difficulty resetting your password, or are locked out of your account, you can ask your organisation's administrator user to reset your password and/or reactivate your account.

Alternatively, send an email to portal@housing-ombudsman.org.uk and ask us to reset your password or reactivate your account. Please note we may wish to contact you to confirm your identity before taking any action.

5. If this is your first visit, the site will ask you if you wish to enable two-factor authentication (2FA). We recommend that you do so. 2FA provides an extra layer of security and prevents other persons from compromising your account if they discover your password.

- If 2FA is enabled on your account, click 'Send 2FA Verification Code' to send a single-use security code to the email address used as your username



- Check your email and copy or make note of the code. Enter the code You can copy and paste the code into the relevant box. Then click 'Verify'.

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Login Verification

To continue logging in, we need you to complete one of the following

Enter code A new 2FA code has been sent to your contact email address (*****@*****.com). Please enter the 2FA code within to verify your identity and login.

Didn't get the email? [Resend code to my email](#)

We make every effort to ensure that these emails are delivered. If the email has not arrived in your inbox within a few minutes, please check your junk mail folder and add **casework@housing-ombudsman.org.uk** to your safe sender's list. If you still haven't received our email, please try to click on resend the code to my email.

If you still don't receive an email, please email us at **info@housing-ombudsman.org.uk** explaining the problem. We will do our best to answer your request as soon as possible.

Verify →

Need help? Contact your system administrator.

➤ If you do not wish to enable 2FA, click 'Later'

6. You will then enter the portal.

Home page

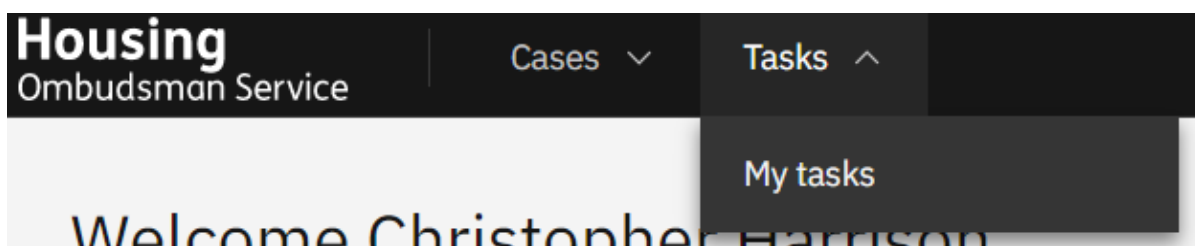
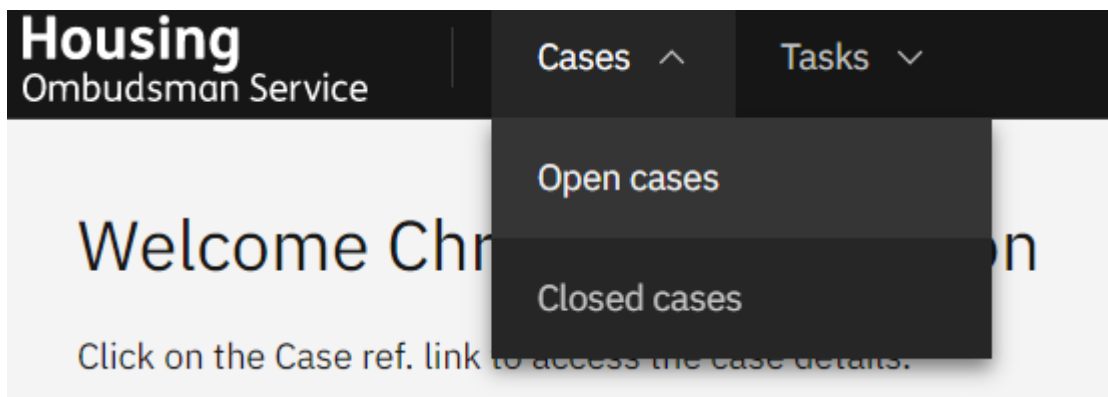
Welcome Christopher Harrison
Click on the Case ref. link to access the case details.

Complainant	Landlord	Case ref.	Title	Date	Task due date	Status
Mr Christopher Harrison	Harrison's Huts Limited	202200046	Do that	26/04/2022	28/04/2022	Overdue
Mr Christopher Harrison	Accent Group Limited	202200106	No outstanding actions			
Mr Christopher Harrison	Aster Group Limited	202200107	No outstanding actions			
Mr Christopher Harrison	Basildon Borough Council	202200108	No outstanding actions			

You will now see the home page, or 'landing page' of the portal. You can return to this page at any time by clicking on the Housing Ombudsman Service logo on the top left of the screen.

Top left banner menus

You can use the '**Cases**' and '**Tasks**' menus at the top left of the screen to view open or closed cases, and outstanding tasks. Click on 'Cases' and choose whether you want to see open cases or closed cases. Click on 'Tasks' then 'My tasks' to view your outstanding task list.






If your window is not wide enough to accommodate the view above, or you are using the site via a mobile device, you will see the banner below. Click on the three lines to access the cases and tasks menus.



Top right banner menus

These buttons on the top right will, from left to right:

-  Open a 'quick view' of tasks
-  Manage your portal account* (including 2FA preferences and changing your password) and log out of the portal.
-  View the accessibility statement

*Landlord administrator users will also be able to create and manage their users' accounts

Open / Closed cases screen

The Open and Closed cases views are similar and look like the screenshot below:

Complainant	Landlord	Case ref.	Case Type	Status	Task due date
TEST TEST TEST	Test Test Test	202204339	Complaint - DR2	Case under assessment	

This list shows the name of the complainant, the name of the landlord, our case reference number, the type of case, the case status, and the date on which the next task is due. Closed cases display the date the case was closed.

The case reference number is a link; click on this to open the case screen for the selected case.



By design, portal users should only be able to see cases which they are involved in.

If you have access to cases which you do not recognise, please contact us as soon as possible and let us know.

Case screen

Overview

The case overview tab will look similar to the one below:

The screenshot shows the 'Overview' tab of a case screen. At the top, there is a navigation bar with 'Housing Ombudsman Service', 'Cases', and 'Tasks' menus, along with notification and user icons. The case title is 'TEST TEST TEST - 202204350' with a subtitle 'Complaint about a member landlord | DR2 Review | Case under assessment'. Below this are four tabs: 'Overview' (selected), 'Tasks', 'Documents', and 'Messages'. The 'Overview' tab is divided into several sections:

- My tasks (1 of 1)**: A list of tasks with a 'View all tasks' link. One task is shown: 'Escalation - First notice response' with a due date of '29/06/2022'.
- Case Details**: A section containing:
 - Asbestos**
 - Details**:
 - Main Contact**: TEST TEST TEST, Test individual address line 1, Test individual address line 2, Test individual address line 3, Test individual address line 4, Test individual address line 5, TE57 073
 - Landlord**: Test Test Test, Test Address Line 1, Test Address Line 2, Test Address Line 3, Test Address Line 4, Test Address Line 5, Test Postc
 - Created**: 16/06/2022
- Case Owner**: Christopher Harrison, Management, with a 'Case Handler' role.

On the left-hand side, you will see a list of up to five upcoming tasks. You will also see case details. In the middle, you'll see the case details including the category of complaint, the resident's name and address, the landlord, and the date the case was created.

The tabs on the right-hand side can be used to move between tasks, documents, and messages.

Tasks

The Tasks tab shows tasks outstanding on the case.

Mr Christopher Harrison - 202200173


Complaint about a member landlord | DR2 Dispute Support | Case under assessment

Overview Tasks Documents Messages 1

Tasks to complete

This table shows a list of tasks to be completed by you.

Status	Title	Target date	
▼ Pending/New	Upload documents for investigation	28/06/2022	⋮
▼ Pending/New	Read message from case 202200173	20/06/2022	⋮

Click on the menu button  to complete a task or tell us that you are unable to complete the task.

- Task completed
- Unable to complete

If you are unable to complete a task, you will be able to tell us why. A caseworker will then review the reasons for the task being incomplete.

Test task - Please upload a document and mark this task as complete

Unable to complete this task

Tell us why you are not able to complete this task so we can help you.

0/280

Cancel Send Message

The image shows a dialog box with a title bar that says "Test task - Please upload a document and mark this task as complete" and a close button (X). The main heading is "Unable to complete this task". Below this is a text prompt: "Tell us why you are not able to complete this task so we can help you." To the right of the text is a character count "0/280". Below the text is a large, empty text input area. At the bottom of the dialog are two buttons: "Cancel" on the left and "Send Message" on the right.

Documents

The Documents tab gives you the opportunity to upload documents, and to download any documents you have previously uploaded.

To upload a document from your computer or device, click on 'Browse documents' and select the file you want to upload. Alternatively, you can "drag and drop" files into the document list from your computer.

Documents

Upload documents to the case, or download existing documents.

Drag and drop documents or click on "Browse documents", then select a category that best describes each document's content and click "Upload documents".

Browse documents

Title

Drag and drop files here or upload

Only file types .swf,.jpg,.jpeg,.jpe,.gif,.bmp,.png,.doc,.docx,.xls,.xlsx,.ppt,.pptx,.pdf,.txt,.xml,.xsl,.xsd,.css,.zip,.rar,.template,.htmtemplate,.ico,.avi,.mpg,.mpeg,.mp3,.wmv,.mov,.wav,.msg,.tif,.tiff,.eml,.msg,.mp4,.rtf,.odt,.csv,.rmsg,.7z,.mht.
Max. file size 250.0019073486328 MB.

The portal will then ask you to set a category for each document you are uploading. Please select from the 'Choose a category' drop-down list.

If you are uploading more than one document and all documents are of the same category, check the box next to "Set same category for all documents", then select the category for the first document. The same category will then be applied to all the other documents you are uploading in this batch.

Browse documents

Select a category for the documents and click "Upload Documents".
Documents won't be uploaded unless clicked.

Document

2022-01-27 Instructions for portal testers.docx

2022-01-27 Instructions for p... x

Category Set same category for all documents

Choose a category v

Notes about uploading documents

Please note the following:



Please ensure that any files you upload to our portal are clearly and meaningfully named. This will help our caseworkers quickly identify the documents they need during an investigation.



Our portal will accept most commonly used file types, including: various picture files. Microsoft Office documents, PDFs, emails, etc.



Please refrain from providing OpenDocument Text Documents (.odt) files, compressed or “zipped” files, or files with password protection.



The maximum size for an individual file is 55 megabytes (55MB).



Please refrain from providing us with sensitive third-party information unless we have specifically requested it. If you need to provide such information please ensure it is made clear in the file name or associated message that the document(s) uploaded contain sensitive information.

Messages

The Messages tab shows you any messages we have sent you on that case and gives you the opportunity to reply. The history of messages on the case will be visible.

You can include attachments with your message response, though please note that for the time being such attachments will only display in the messages tab and not in the documents list for the case. We are working on a fix for this.

Portal users will only be able to respond once per message from us. If you need to contact us again about your case(s) after responding to a message via the portal, please contact us by email at casework@housing-ombudsman.org.uk or telephone 0300 111 3000 quoting your case reference number(s).

The screenshot shows the Housing Ombudsman Service portal interface. At the top, there is a navigation bar with 'Cases' and 'Tasks' dropdown menus. Below this, the case title 'Mr Christopher Harrison - 202200046' is displayed, along with the complaint details 'Complaint - DR2 | DR2 Dispute Support |'. The main content area is divided into tabs: 'Overview', 'Tasks', 'Documents', and 'Messages'. The 'Messages' tab is active, showing a list of messages. The first message is from 'Christopher Harrison' dated '25/02/2022' with the subject 'MESSAGE!!!!'. The second message is from 'Christopher Harrison' dated '14/02/2022' with the subject 'This is just a test.' Below the messages, there is a text input field labeled 'Write a message...' and a character count '0/2000'.

My Tasks

Go to the My Tasks screen to view all your tasks.

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My tasks

This table shows a list of tasks to be completed by you. If you are unable to complete a task, please contact us by clicking on the menu (⋮) option "unable to complete" to let us know why.

Status	Title	Target date	Case ref.
● Pending/New	Test task - Please upload a document and mark this task as complete	03/02/2022	202200001 ⋮
● Pending/New	Test task - please complete this task	03/02/2022	202200001 ⋮
● Pending/New	Test task - please indicate that you cannot complete the task	03/02/2022	202200001 ⋮

The 'My tasks' view behaves in the same way as the tasks tab on the case screen. For instructions on how to use this screen, see [Tasks](#).

Manage your profile and settings

Click on the  icon in the top right of the screen and click on 'Profile and Settings'.

My Account

Profile and Settings

Log out

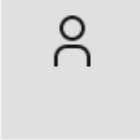
Change your password


To change your password, click on 'Edit Password'

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Cases ▾ Tasks ▾

Profile and Settings

 Christopher J Harrison
harrisonshuts4@proton.me
Active

Password ***** Edit Password 

Enter your current password in the first box, your new password in the second box, and confirm your new password by entering it again in the third box, then click 'Update Password' (or 'Cancel' if you no longer wish to change your password).


Password

Current password

New Password

- ✓ 10 characters minimum
- ✓ At least one uppercase letter
- ✓ At least one non-alphanumeric
- ✓ At least one lowercase letter
- ✓ At least one number


Confirm Password

Cancel Update Password 

Enable 2FA


To enable 2FA on your portal account, click 'Enable 2FA'.

Two-Factor Authentication (2FA) 2FA is disabled for this account. This increases the risk of a security breach against your account. We recommend that you enable 2FA to keep your data more secure.

Enable 2FA 

To disable 2FA on your portal account, click 'Disable 2FA'.

Two-Factor Authentication (2FA) 2FA is enabled for this account.

Disable 2FA 


Landlord user account management

From here, you will be able to:

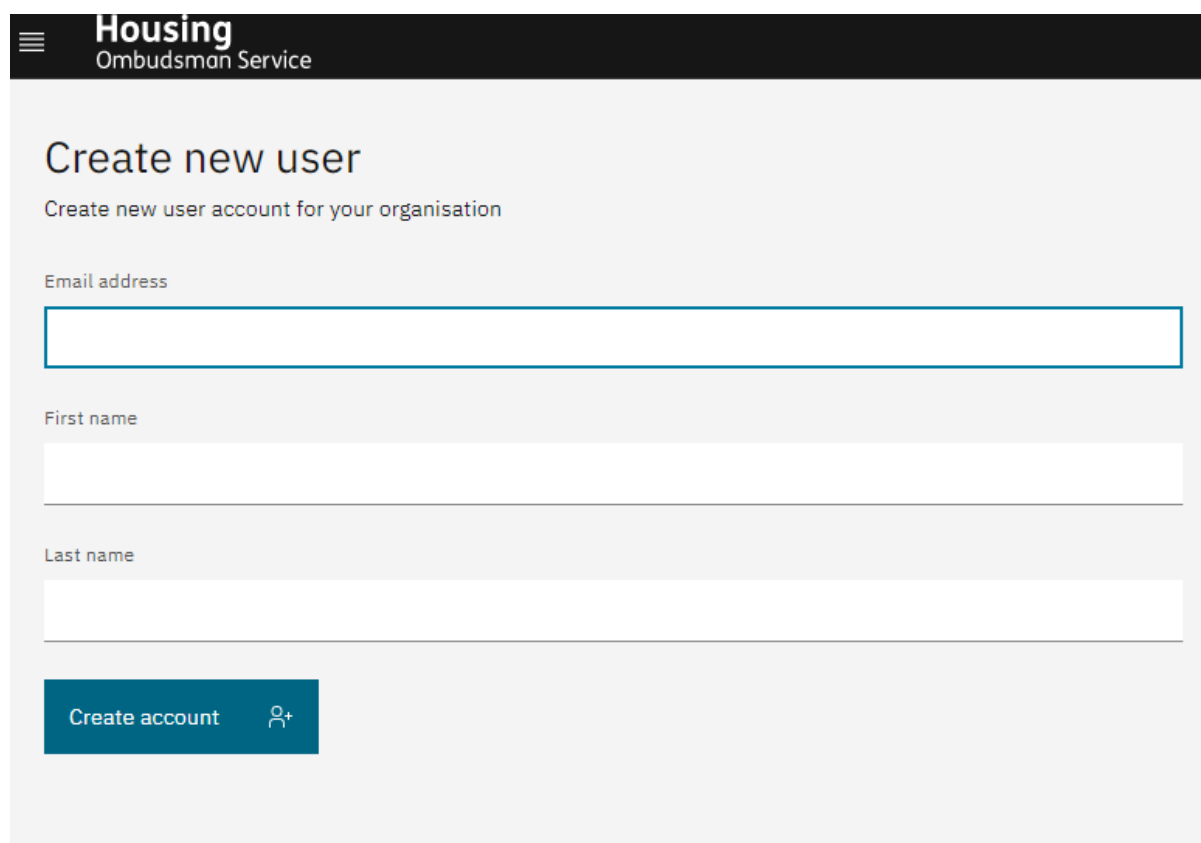
- See a list of users you have set up for your organisation, such as other members of your complaints team, reset their passwords, and mark them as 'active' or 'inactive'.
- Create a new portal user account for someone in your organisation
- View your profile, change your password, and enable or disable 2FA.

If you need to change the landlord administrator user account email address, please contact us at portal@housing-ombudsman.org.uk.

Create new user


Click on the  icon in the top right of the screen and click on 'Create a new user'

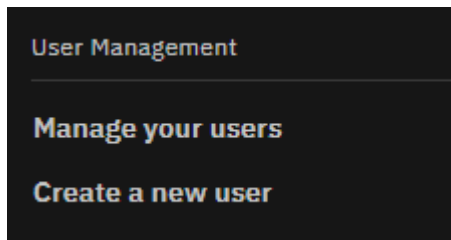
Enter the email address, first name and last name of the colleague you wish to set up and click 'Create account'.



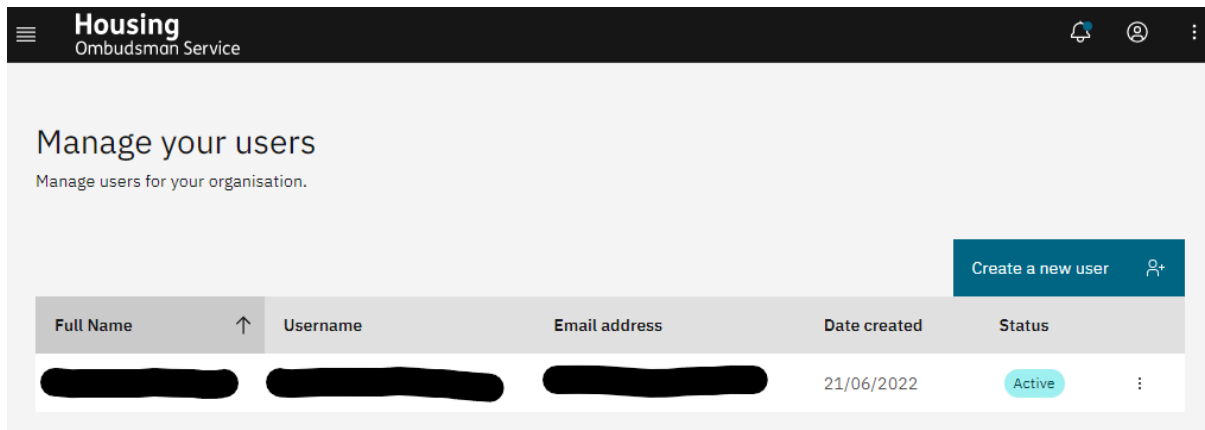
The screenshot shows the 'Create new user' form. At the top left, there is a menu icon and the text 'Housing Ombudsman Service'. The main heading is 'Create new user' with a subtitle 'Create new user account for your organisation'. Below this are three input fields: 'Email address', 'First name', and 'Last name'. At the bottom, there is a blue button labeled 'Create account' with a user icon and a plus sign.

Manage your users

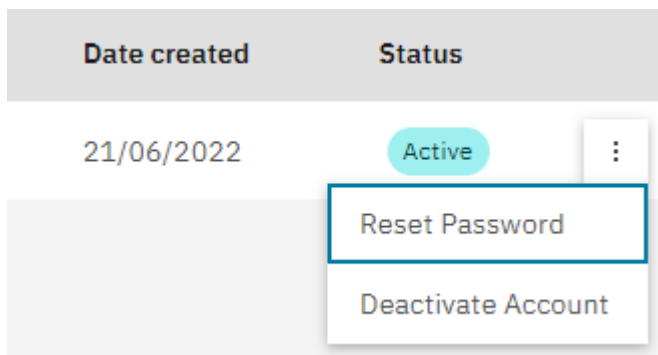
Click on the  icon in the top right of the screen and click on 'Manage your users'.



This will take you to a list of your users.




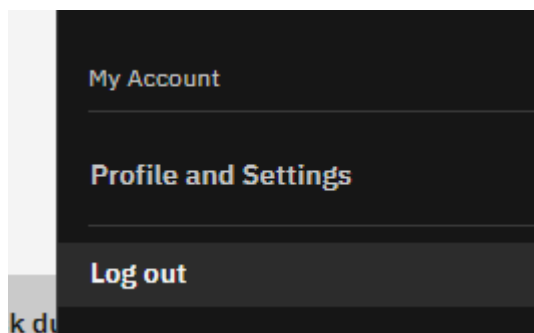
To reset a password, active or deactivate a user, click on the  icon.



You can also click on 'Create a new user' to go to the new user creation screen.

Log out

Click on the  icon in the top right of the screen and click 'Log out'.



Support

If you experience problems resetting your password, problems with two-factor authentication or are locked out of your account, please email us at portal@housing-ombudsman.org.uk.

Acceptable use of the portal

Our service is independent, impartial, and free. We believe that customers of our Service have a right to be heard, understood, and respected. We work hard to be open and accessible to everyone.

Occasionally, the behaviour or actions of individuals using our Service makes it very difficult for us to deal with their complaint. In a small number of cases the actions of individuals become unacceptable because they involve abuse of our staff or our process.

When this happens, we have to take action to protect the health and wellbeing of our staff who have a right to do their jobs without fear of being abused or harassed. We also consider the impact of the behaviour on our ability to do our work and provided a service to others.

We reserve the right to restrict access to the portal if a portal user's behaviour becomes aggressive, abusive or otherwise unreasonable as set out in our Unacceptable User Action Policy, which you can find on our website at <https://www.housing-ombudsman.org.uk/>.