PORTAL SERVICE DEFINITION

1. SERVICE OVERVIEW

The Portal service is a managed Software as a Service (SaaS) platform designed specifically for housing providers and public sector organisations to manage digital interactions, service delivery and resident engagement.

The platform provides a structured environment for delivering online services to residents, including repairs reporting, rent and payment services, document access, communications and compliance information. This supports organisations in improving service visibility, consistency and responsiveness while giving residents clearer insight into the progress of their requests and interactions.

The service is designed to be accessible to both staff users and residents, with appropriate controls to ensure users can only access information relevant to them. It supports a wide range of housing service scenarios within a governed and configurable platform rather than through bespoke development.

The Portal is delivered as a fully managed cloud service. We are responsible for hosting, platform maintenance, security management and operational support. This allows customers to focus on service delivery, communication and resident experience rather than managing infrastructure or core application technology.

2. SERVICE MODULES AND CAPABILITIES

The Portal provides a configurable set of modules and functional capabilities aligned to the needs of social housing providers.

Authentication and User Management

The platform supports secure user authentication and profile management for both residents and staff. It includes multi-factor authentication options, self-service password management, support for multiple tenancies, and secure staff impersonation for support purposes.

Resident Dashboard and Navigation

Residents access a personalised dashboard that presents relevant information, notifications and shortcuts to key services. The interface is responsive, accessibility-aware and can be branded and configured to reflect the housing provider's identity and priorities.

Rent and Payments

Residents can view account balances, transaction history and charge breakdowns, and make secure online payments through integrated payment providers. Refund requests and direct debit setup can be supported where enabled.

Repairs Management

The repairs module enables residents to report issues through guided workflows, upload photos, track repair status and manage appointments where integrated with back-office systems. It supports emergency repair guidance, cancellation, rescheduling and repair history visibility.

Document Management

Residents can access general and tenant-specific documents, with integration to document management systems where required. Secure download and browser-based preview are supported.

Communications

The platform supports targeted communications, notifications and message history for residents, helping housing providers maintain consistent and trackable engagement.

Compliance Information

Residents can view compliance-related information about their property, including inspection dates and certificates, helping organisations demonstrate transparency and regulatory compliance.

Additional Tenant Services

Configurable forms and service pathways can be provided for activities such as updating personal details, submitting notices or participating in engagement initiatives.

These capabilities are available within the platform and can be enabled and configured according to organisational priorities, allowing the service to support a range of operational processes within a consistent and secure model.

3. Onboarding and Implementation

Onboarding to the Portal follows a structured and collaborative implementation approach designed to align the platform with the organisation's services and operating model.

The process typically begins with discovery and requirements alignment, focusing on which modules and service pathways will be enabled, how workflows should operate, and how the platform should be structured for different user groups. This includes defining resident-facing journeys such as repairs reporting, payments, document access and communications, as well as internal processes for case handling and updates.

The platform is configured rather than custom built. Work includes setting up forms, workflows, status definitions, user roles and permissions, and branding elements. Where required, integrations are

established with housing management, repairs, payment or document management systems using defined interfaces.

User acceptance testing is carried out to ensure that configured processes reflect the organisation's requirements. Training is provided for administrative and operational users to ensure they are confident managing content, workflows and day-to-day platform use.

Go-live is supported through coordinated cut-over planning and early-life support, helping ensure a smooth transition into live operation. This structured approach enables the service to be implemented in a controlled and predictable way while remaining flexible to local needs.

4. Ongoing Support Model

The Portal is delivered as a managed service with ongoing platform, hosting and user support.

We are responsible for maintaining the hosting environment, applying platform updates, managing security patches and monitoring service performance. This includes proactive monitoring of service availability and responsiveness, supported by our cloud operations partner, BCN, to help ensure consistent operational performance.

Customers manage day-to-day operational use of the platform, updating records and managing communications within the system. Administrative users can manage content, workflows and configuration settings within their authorised permissions.

User support is available through defined support channels, with response and resolution targets aligned to incident severity. Support covers platform issues, hosting-related incidents and operational queries relating to system use.

Regular service reviews can be carried out to discuss performance, usage trends, upcoming platform updates and evolving requirements. Where customers wish to extend the platform and make use of additional modules through further integrations, configurations or new service pathways, this work is delivered using the published development day rates, agreed in advance through a defined change process.

The mobile application is available as an extension of the Portal service. In most cases, organisations choose to introduce the mobile app as a phased rollout after the core portal is live and embedded, ensuring a controlled and well-supported expansion of digital access for residents.

5. Security and Data Protection

Security and data protection are central to the design and operation of the Portal service, reflecting the sensitive personal and operational data it processes and the fact that it is accessed by both organisational users and residents.

The service is hosted within a secure cloud environment with UK-aligned data residency. Access to the internal staff platform is controlled through role-based access controls, ensuring staff users can only access information appropriate to their role. Privileged and administrative access is restricted to authorised personnel and managed through defined access control processes. User activity within the platform is recorded to support auditability, traceability and investigation where required.

The service is designed to support secure access for external users such as residents. Resident access is limited to their own information and transactions, such as reporting repairs, submitting forms, making payments or updating personal details. Logical separation is enforced between users to prevent unauthorised access to other individuals' data.

Data is encrypted in transit using industry-standard protocols and protected at rest within the hosting environment. Regular platform updates, security patching and vulnerability management are carried out as part of the managed service to reduce exposure to known threats.

Operational security is supported through collaboration with our cloud and infrastructure partner, BCN. BCN provide additional monitoring, operational oversight and technical support across the hosting environment, helping ensure that security, patching and resilience practices are consistently applied. This layered approach strengthens operational security while maintaining clear accountability within our own service management structure.

We operate defined information security and data protection practices aligned with UK public sector expectations, including incident management, access management and ongoing security review.

6. Hosting, Availability and Resilience

The Portal is delivered as a fully managed hosted service designed to support reliable day-to-day operation of digital housing services.

The platform is hosted within Microsoft Azure using resilient infrastructure and UK-aligned data residency. The hosting environment is designed to reduce single points of failure and is continuously monitored to detect performance degradation or outages. Our cloud operations partner, BCN, provides additional 24/7 monitoring and technical support as a secondary safeguard.

Regular backups are taken to protect service data and configuration, supporting recovery in the event of data loss or corruption. Planned maintenance and platform updates are managed through controlled deployment processes to minimise disruption to users.

The service supports transactional and case-based interactions between residents and housing providers. Its hosting and operational model are designed to provide a stable platform for these activities, recognising the importance of continuity for resident-facing digital services while acknowledging that all cloud services are subject to planned maintenance and rare unplanned events.

This can support organisations in evidencing service performance and transparency in line with evolving regulatory expectations.

7. Configuration and Customisation

The Portal is designed as a configurable platform that can be aligned to custom processes without requiring bespoke software development.

Customers can configure branding elements such as logos, colour schemes and user-facing messages. Workflows, forms, status definitions and service pathways can be configured to reflect how the organisation delivers services such as repairs, payments, complaints and compliance-related activity. Content elements within dashboards and notifications can also be managed by authorised users.

Configuration is carried out within the structure of the platform to ensure maintainability, security and consistent upgrades. While the service is flexible, it operates within a governed model that prioritises reliability and long-term sustainability over open-ended custom development.

Where additional functionality or integrations are required beyond the standard configuration scope, these are delivered as controlled enhancements using the published development day rates, agreed in advance through a defined change process, or via our roadmap, which delivers continuous enhancements year on year.

8. Integrations and APIs

The Portal is designed to operate within the complex system environments typical of housing providers.

The platform supports integration with housing management systems, repairs and maintenance systems, payment providers, document management systems and identity providers. These integrations enable data exchange to support functions such as repairs status updates, rent account information, document visibility and secure authentication.

Integrations are delivered through defined interfaces and connectors, with data mapping and business logic aligned during implementation. The aim is to enable consistent and reliable data exchange while maintaining clear boundaries between systems.

The same integration model supports both the web portal and the associated mobile application, ensuring a consistent experience across channels.

9. User Roles and Access

The Portal supports structured user roles to ensure appropriate control, accountability and separation of access.

Resident users can access only their own information and service interactions. Staff users are assigned roles that determine which cases, records or administrative functions they can access. Additional permissions can be applied to support specialist roles such as administrators or service managers.

Authorised staff can securely access resident accounts for support purposes using controlled impersonation features. All access to administrative and configuration functions is restricted to approved users, as set on a customer's internal identify management systems, e.g. Microsoft Entra.

This role-based approach helps organisations maintain appropriate data protection controls while enabling staff to deliver effective support and service management.

10. Offboarding and Data Exit

The service includes a defined and controlled approach to offboarding at the end of a contract.

Customers can request an export of their service data in commonly used, machine-readable formats, covering core records and associated metadata held within the platform. Reasonable support can be provided to help customers understand the structure of exported data to support transition to an alternative system if required.

Following contract termination, user access is removed and hosting environments are decommissioned in line with agreed data retention and security practices. Data is securely deleted after the agreed retention period unless otherwise instructed by the customer.

11. Ordering and Commercial Approach

The Portal is offered as a managed SaaS service with defined subscription pricing covering platform access, hosting, core maintenance and standard support.

Customers subscribe to the platform based on their required scope of use, modules and user volumes, as set out in the published pricing. The mobile application is included as part of the same platform model and can be introduced as a phased extension to the core portal.

Where customers require additional integrations, configuration or functional enhancements beyond the standard scope, this work is delivered using the published “In Programme Development” day rates listed in the pricing document. All such work is agreed in advance through a defined change process, ensuring transparency and predictable costs within the framework structure.