

Customer Portal Resident Involvement Report

December 2020 and March 2021

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Customer Involvement Officers



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Report Purpose

Southern Housing Group (The Group) currently provides residents with the option to register to “Me&SHG” - the Group’s personal account Customer Portal. Residents can currently use this portal to pay their rent, report a repair and find details for their local repair contractor.

The IT Project Team wanted to ensure residents were involved in helping them to shape improvements for the Customer Portal from the options available we have with the developer.

The development of the Customer Portal began in December 2020.

The review of the Customer Portal in 2021 was the first of four further planned stages of consultations with residents. Each stage will take place approximately every 3 months.

Residents were presented with a demo of the proposed improved portal and were asked questions to explore the thoughts of users and non-users.

The IT Project Team and the developers, Active Housing, will explore what recommendations can be taken forward following each stage of the consultations. A summary of the feedback was shared with the IT Project Team the day after both online focus groups in December 2020 and March 2021.

Consultation Themes

The themes were to improve the functions, readability and look and feel of the ‘Me&SHG’ customer portal.

To improve the Customer Portal, it was also important to ensure residents who had not previously used the portal, would consider using it in the future and would recommend it to other residents.

Consultation Methodology.

Due to Covid-19 guidance on essential travel, it has not been possible to involve non-digital residents in being part of the development of the portal in face to face focus groups.

The Customer Involvement Team were aware that the digital users themselves would each have different technical skill sets. Our involved residents had knowledge of different communication needs and were able to provide in-direct feedback on behalf of non-digital residents at this time.

In December 2020, the focus groups for the New Online Repair Service and the Customer Portal were undertaken during one evening. This approach was decided after considering the time of year and the time required by residents taking part in the delivery of the New Online Repair Service.

In March 2021, a months’ notice of the consultation was provided to residents interested in the New Online Repair Service, Decembers’ Customer Portal focus group, the Digital User Group and residents interested in User Testing.

In line with standard research practice, and due to the numbers of residents involved, the findings of this review group cannot be viewed as providing representative feedback on the views of all the Group's residents. These results do provide an insight into the views and opinions of residents.

Respondent profile

This information has been gained to help monitor inclusivity of residents participating in the project.

December 2020

Gender	Tenures	Regions
3 Male	3 General Needs	2 North
2 Female	2 Shared Owner	2 South
		1 Sheltered

March 2021

Gender	Tenures	Regions
4 Male	4 General Needs	1 West Sussex
2 Female	2 Shared Owners	1 Essex
		1 Hampshire
		1 Berkshire
		2 London

Consultation findings – December 2020

Do you currently use the Customer Portal (Me&SHG)?

1 resident said Yes
4 residents said No

After the changes put forward are made to the Customer Portal, will you use 'Me&SHG'?

5 residents said Yes

What do you like about the proposed changes to the Customer Portal?

- Seeing services in one place – rent, repairs.
- The look and feel of the portal.
- Being able to check some of the information held about me.
- Being able to change the 'preferred language' for the words on the portal.

What didn't you like about the proposed changes to the Customer Portal?

- The 'preferred language' for the words on the portal is located at the top of the screen and needed to be pointed out.
- Using the tenancy reference number to login to the portal – I cannot remember mine and some residents may call the Service Centre to gain their number.
- Colours to indicate if a resident has arrears – need to remove the colour or not have the balance on the front screen of the portal when you have logged in. Family members may see the arrears.

Any other feedback?

- The quicker it (Customer Portal) is rolled out, the quicker people will get on board.
- Who has access to the data stored within the Group?
- How is the Portal protected against misuse? (E.g. domestic abuse)

Prior to future testing of digital platforms, residents who had been involved with any phases of the New Online Repair Service, were asked to give feedback on their experience:

4 residents responded. Only residents taking part in Decembers' 'Authentication and Tracking of a Repair' phase of the New Online Repair Service and the Customer Portal focus group provided feedback to the questions below:

- What notice period would help you to take part?

3 said 2 weeks minimum.

1 said 1 month.

- What assistance would help you with technical problems during similar future projects?
(Included if relevant for consideration to IT Projects in general)

Getting connected to Zoom.

Ensuring test programme links are correct when provided.

- Any other feedback? (Included if relevant for consideration to IT Projects in general)

It is nice to see a project implemented over time and to see the progression of the project.

Consultation findings – March 2021

The Project Team provided an overview of the timescales for changes to the Customer Portal. The Focus Group were shown each planned page of the Customer Portal, in addition to an explanation of how some features will look as they are developed.

The first stage of the Customer Portal development will be 'live' for residents to use from May 2021.

The Customer Portal has been developed in stages to enable residents to be able to use the improvements available as they become 'live.'

Question:

How many residents attending the focus group currently use the Customer Portal?

Answer:

83%

Managing Account Settings

Residents using the Current Portal will be sent an invite to connect with the new portal.

To register, all residents will need to provide their name, date of birth and their tenancy reference number. Residents will create a username and a password as part of this process to then login to the Customer Portal.

The Tenancy Reference number can be found on the Service Charge and Rent booklet or annual rent statement.

If their details have changed, they need to inform the Service Centre who will update their email address and/or mobile number to enable their first entry into the Portal.

During the Groups' advertised Service Centre business hours, the Web Chat function can be used to speak to a Customer Service Advisor and gain help to change these details. Alternatively, a feedback form can be sent from the Portal to the Service Centre for when they are available.

Residents can choose all 'tenancies' should they have more than one, i.e. garage and home.

Current users of the Portal will have their former accounts transferred over to the new portal and their old account, disabled.

Question:

Some non-digital residents are concerned that services are heading towards being digital only.

Answer:

The Customer Portal is an additional way for residents to communicate with The Group, not a replacement.

If residents are currently engaged with services such as Resident Involvement or Community Investment (Financial Inclusion/Employment Skills), it is important that these teams are also provided with updated contact details while their databases merge with the main customer record system.

Viewing and Updating Tenancy Information

'My Tenancy' Screen'

Residents were informed they would be able to request changes to names and who lives in the home prior to edits being accepted by Southern Housing Group. This is to enable documents to be requested and checked, such as wedding certificates.

At a later stage of the portal development, residents will be able to upload documents required at the same time as submitting a request.

During the Groups' advertised Service Centre business hours, the Web Chat function can be used to speak to a Customer Service Advisor.

Contact details such as telephone numbers and email addresses will be able to be updated 'live,' 24 hours a day, by residents by changing the details themselves through the Customer Portal.

Payment and Rent Account

Pay 360 will replace the Allpay payment system to provide a flexibility to the service for residents wanting to make payments online.

Residents will be able to make payments through the Customer Portal. The service works through a secure payment gateway on the Pay 360 website.

Residents will be able to print off their statements if they would like to.

Question:

Why does the balance show a 'minus' sign for a positive balance?

Answer:

This question will be shared with the Rent Team. This is connected to the finance system and outside the control of the Project Team for the Customer Portal

Question:

Will the system remember your entered card details or will the resident need to re-enter the details every time?

Answer:

Currently the card number will not be retained/remembered, but as the Customer Portal is developed, this feature will be included. A 'wallet' will enable different cards to be saved and for the resident to choose the card they would like to pay on. There will also be an APP available for Pay360.

Question:

How will residents be informed of the change from Allpay to Pay360?

Answer:

Southern Housing Group are discussing how to communicate this to residents.

Question:

The old system would show the Service Charge and rent amount on the same line

Answer:

We will share this with the rent team for them to reply.

Question:

Will the payment screen be clearly branded?



Answer:

Yes.

Reporting Repairs

From April 2021, residents in both DW maintenance areas and SMS maintenance areas, will be able to add, schedule and track a repair on the New Online Repair Service.

A link to this service can be accessed by going into the Customer Portal to enable services to be available in one place.

Testing for the rescheduling and cancelling of a repairs' is taking place in April.

The IT Project Team briefly showed the initial screen residents will see for the New Online Repairs Service. Residents can enter their name, postcode and select their address to see if the service is 'live' in their area for general plumbing, electrical and carpentry repairs.

Other queries

Name of the Customer Portal

The IT Project Team are exploring with the Group rebranding of the Customer Portal to make it more visible to residents and more obvious as to what it does.

Residents would prefer the button/link to refer to them as 'Residents' as opposed to saying 'Customer' in any change of rebranding.

One suggestion by a resident was to call the Portal 'My SHG.'

Residents said any name changes needed to be carried out carefully to not confuse current users.

Summary of Improvements for April 2021

- It will adapt to the size of residents' screens' whatever device they are using. The current system will not do this.
- Contact details can be updated immediately. The old system required a request to be sent to the Service Centre for contact details to be amended.
- Residents can opt in to give feedback on the Customer Portal improvements.
- No longer a need to provide memorable information as part of the signing into the portal

- A Frequently Asked Questions drop down list will be provided. This will ‘talk’ to the Service Centre to enable you to ask your question without having to re-type your details. You can also use the ‘live’ webchat during the Service Centre’s normal working hours.

Improvements to follow

The following improvements were discussed during the focus group. Further developments will be announced in future focus groups.

- As the Portal develops, residents will be able to state how they would prefer to be contacted – email, text, call etc
- Updates to accounts after making payments shown within 24 hours on online statements
- A ‘wallet’ will be inserted to save residents’ payment card details in. This will residents from needing to re-type their details every time they pay

Feedback from resident testing

Two residents were given the opportunity to test the sign in system to the Portal using test data. Limiting the number of resident testers enables a longer invitation period to a focus group due to the work involved to set up test screens.

The IT Project Team shared their own screen to enable the other members of the focus group to see the Portal.

The residents told us:

The portal needs to make residents aware what the password needs to contain before constructing one. At the time of testing, the information was only provided *after* testers entered passwords that were not accepted.

The screen informs residents that ‘special characters’ are required, but it was agreed by the focus group that it would help residents if examples of these could be provided. Residents were concerned that otherwise users of the portal could become frustrated and give up

Question:

How many residents attending the focus group would now use the Customer Portal after the changes are made?

Answer:

100% will use the Customer Portal

80% will let others know about the changes to the Customer Portal

Report summary

The key outcomes have been summarised and reflect majority opinion from the qualitative and quantitative data:

December 2020

The IT Project Team were keen to ensure residents were involved in helping them to shape improvements to the Customer Portal, 'Me & SHG'. There were limitations to the changes that could be made by the developers and so the IT Project Team wanted to share a demonstration of the options to residents prior to making decisions.

They wanted to increase the number of residents currently using the Customer Portal and needed to understand the thoughts of digital residents not using the portal, as well as those that did.

The IT Project Team were also working to a limited timescale prior to works commencing by the developers early in 2021. The IT Project Team needed to gain residents' feedback in December 2020 and were waiting for further information from the developers, Active Housing, in November 2020.

A pool of residents involved in the consultations for the New Online Repairs Portal were asked to take part in feeding back on the Customer Portal to assist with the short notice invitation.

The IT Project Team agreed to a further review of the Customer Portal when a timeline can be arranged. Involving non-digital residents will be discussed when government guidance enables people to meet more widely. Non-digital residents need to be shown the screens in person to help them gain confidence in using technology.

For future stages of the consultation, we can consider including non-digital residents in a 'dial-in' telephone conference to discuss what would help them to get online and/or give them confidence to use the Customer Portal.

All residents taking part said they would recommend the Customer Portal to other digital residents once the changes proposed had been undertaken.

During the focus group, residents raised a concern regarding the use of residents' data by staff. Residents were informed that all staff undertake required data security courses when joining the Group and then at regular intervals during their employment.

March 2021

For the same reasons explained in the December 2020 summary, non-digital residents were not able to be invited to this focus group.

7 residents out of the 10 that accepted the invite attended the focus group. One resident needed to assist their relative post lockdown and another resident we will be supporting to use Zoom prior to future focus groups.

83% of the residents attending said they currently used the Customer Portal. 100% said they would use the Customer Portal when the changes are made. 80% said they would let other residents know about the changes to the Customer Portal.

Understanding of Rent balance:

The use of 'minus' and 'plus' signs on Rent Statements was questioned by residents. Several residents said that the signs were confusing and led to queries about if an account was in arrears or credit.

The '-' sign is currently used to show that there is a credit as opposed to a debit on the balance.

The Customer Involvement Team will share this feedback with the Service Centre.

Naming and branding the Customer Portal

The name to the Customer Portal may change to ensure the purpose of the Customer Portal can be identified on the Groups' website. A resident attending the focus group was involved in the naming of the Customer Portal button/link on the website. The original purpose was to link the Customer with the Group.

If residents are currently engaged with services such as Resident Involvement or Community Investment (Financial Inclusion/Employment Skills), it is important that these teams are also provided with updated contact details while their databases merge with the main customer record system.

Recommendations December 2020

These recommendations have been **summarised** and reflect majority opinion from the qualitative and quantitative data.

Please consider the following:

- What suggestions can be taken forward?
- What is the timeline for the changes?
- Has each recommendation been responded to?

You said	We Did
Viewing and Updating Tenancy Information	
1. Consider sharing with residents how their personal data is protected and what training staff accessing their data have.	1. During the focus group, the Customer Involvement Team shared with residents the mandatory data protection and security courses all staff are required to take at the start of their employment and during their employment at monitored intervals. Secure gate ways are used by the Group to external sites for payments.
Payment and Rent Account	
1. Consider making the balance to the account less visible on the portal to persons supporting residents with repairs	1. The balance will be provided in a neutral colour to avoid indicating a plus or a minus to the account. If the resident is in arrears, the screen will be 'white.'
Reporting Repairs	
No questions raised	
Managing Account Settings	
1. Consider ensuring residents are made aware of where to find their tenancy reference number. a) Avoiding calls to Service Centre. b) Avoiding residents disengaging from registering for the Customer Portal.	1. Under the login, there is a link to a drop-down box enabling residents to look at places where their Tenancy Reference number can be found.

Other	
1. Consider making the 'preferred language' drop down more visible to residents accessing the portal.	2. We are restricted by the web platform provided by the developer as to what changes can be made

Recommendations March 2021

You said	We Did
Viewing and Updating Tenancy Information	
1. Ensure residents are aware that if they are using a Group service, such as Community Investment or Resident Involvement, their database at this time is not connected to the system linked to the Customer Portal.	1. More teams will be working with the Groups' recording system (Customer Dynamics) by the second stage of the development to the Customer Portal. Where communication requests have been agreed while working with specific teams, residents should update these teams directly as their requests may be recorded separately.
Payment and Rent Account	
1. Can the 'minus' that indicates a credit on the balance column be changed? 2. Inform residents when Pay360 has taken over from Allpay 3. Inform residents of when their card details can be 'saved' in the 'wallet' to prevent re-entry	1. The credit column now shows a plus sign instead of a minus sign. 2. Residents have been informed of the change-over to Pay360 3. This is a feature of Pay360. When they have enabled this change, we will inform residents.
Reporting Repairs	
1. When will the rescheduling and cancellation feature be ready to use? 2. From April 2021, what maintenance services have access to the New Online Repair Service?	1. This feature was delayed. We are exploring the roll-out of this feature later in June 2021. We need to ensure that repeated cancellations and rescheduling can be reported within the Group. 2. From April 2021, residents in the DW maintenance area in addition to residents in the SMS maintenance

	services area can now use the New Online Repair Service.
Managing Account Settings	
<ol style="list-style-type: none"> 1. Consider making all residents aware of the changes to the Customer Portal and not just involved residents 2. Ensure current users of the portal are kept informed of the changes 3. Ensure current users of the portal can find the new portal 4. When Signing in, inform residents what 'special characters' means before they try to construct a password. 	<ol style="list-style-type: none"> 1. The communications team will be running a communication programme from summer 2021 using a variety of methods. 2. Current users of the portal will be the first residents to be contacted. 3. All links will be redirected to ensure residents can find the new Customer Portal. 4. Residents will be advised about the special characters required on the password screen. This addition is currently in development.
Other	
<ol style="list-style-type: none"> 1. Naming of the Customer Portal should take into account the following: <ol style="list-style-type: none"> a) Residents prefer to be called residents, b) not be confusing to existing users, c) be easy to understand what the link/button is for 	The new portal will be accessed from the front Group web page through a button labelled 'Sign in.'
FAQ's and Contact Us	
No questions	

Each project will be reviewed, one year on, to see what impact this project has had following on from the outcomes.