Peabody

NEC Housing Contractor Portal

A guide for Peabody contractors on updating works orders & applying for payment

for NEC Housing v22.1

Contents

Introduction

The **NEC Contractor Portal** gives repairs contractors access to Peabody's housing management system, **NEC Housing Self Service**. This lets you:

- View works orders assigned to you
- See details of a works order
- Add notes to a works order
- Vary a works order and add the actual cost
- Mark works orders as complete
- Apply for payment (Invoicing)

Peabody IT will give you login details. As a registered Peabody contractor you will only be able to see works orders issued to you.

You can find the most up-to-date version of this document on our website at https://www.peabodygroup.org.uk/terms-of-use/our-contractor-portal/.

There is also an **accompanying video** on this page.

If you have any questions not covered in this document, talk to your contract manager.

> **i** NEC Housing was formerly called *Northgate.* If you encounter any references to *Northgate* or *NPS Housing*, assume it is referring to **NEC Housing**.

Conventions in this guide

i	Important information

!	Warning – make sure you follow this guidance

✓	Information about Peabody processes or best practice

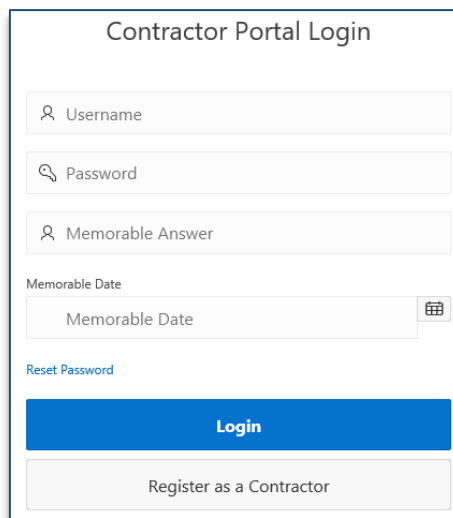# Register with NEC Self Service

Before you start using NEC Self Service you'll need to register.

1. In a web browser visit https://www.peabodygroup.org.uk/terms-of-use/our-contractor-portal/ then click **Access the Portal**.

> ✓ This web page includes guidance on using the system, including a video guide, and a link to the latest version of this document.

Contractor Portal Login

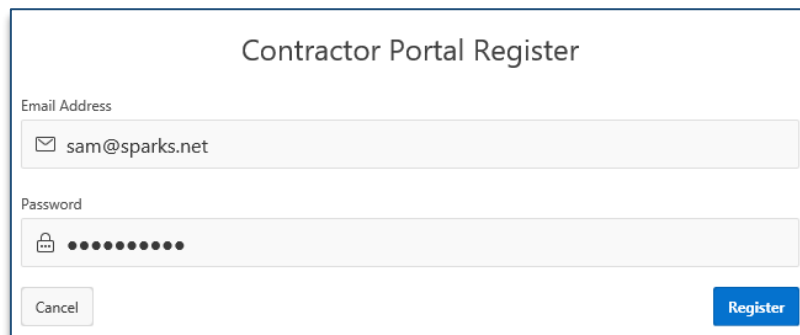| |
| --- |
| 👤 Username |
| 🔑 Password |
| 👤 Memorable Answer |

Memorable Date

Memorable Date	🗓

Reset Password

Login

Register as a Contractor

2. Click **Register as a Contractor**.

Contractor Portal Register

Email Address

✉ sam@sparks.net

Password

🔒 ••••••••••

Cancel   **Register**

3. Enter your **Email Address** and **Password**, then click **Register**.

> ❗ You must use a strong password, with a minimum of 8 characters including numbers.

Step 2: Provide your details to complete registration for Peabody Contractor Portal

Press this link to provide your details. This link is active for 1 hours from the time it was sent.

Verify me

If the button doesn't work, please copy and paste this into your browser:

4. You'll receive an email with confirmation link. Click **Verify me** in the email or click the supplied link.

> **(!)** The Verify Me link is only valid for an hour. If the link expires, you'll need to register again.

Provide Contractor Details

Contractor Site Code

DWCONTR

Contractor Site Contact

REPDWCSMITH

Memorable Question

The forename of a grandparent   ×   ▾

Memorable Answer

JACK

Memorable Date

01-Jul-2021   🗓

Cancel   **Register**

5. Now enter your **Contractor Site Code** and **Site Contact**. Enter details for each of the fields displayed and Click Register

> **(i)** **Contractor site code** is the same as the **Site Ref** code you normally see on your Peabody works orders.
>
> **Contractor Site Contact** is the Contractor Portal username, supplied to you by Peabody.
>
> Ask your contract manager to confirm if you're not sure about these.

6. Pick a **Memorable Question** from the dropdown list and give a **Memorable Answer.**

> ⚠ **Make sure you pick memorable data you will remember!**
>
> You'll need to enter these *every time you log in*. If you forget memorable data **you will be locked out of your account**. You'll have to ask your contract manager to reset them both, which is a time consuming process.
>
> **DO NOT FORGET YOUR MEMORABLE DATA!**

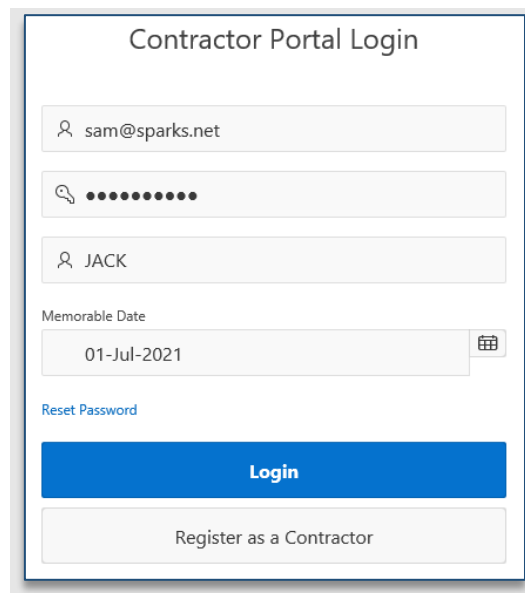7. Add a **Memorable Date** in the format shown above.

> ✅ When entering dates and times into NEC, you must use the DD-MMM-YYYY format, eg **14-JUL-2021**. For times use HH:MM, eg **12:45**.

8. Click **Register**.
9. You'll receive a confirmation email confirming you are now fully registered.

Log in to NEC Self Serve

1. In a web browser visit https://www.peabodygroup.org.uk/terms-of-use/our-contractor-portal/ then click **Access Portal**.

Contractor Portal Login

👤 sam@sparks.net

🔑 ●●●●●●●●●●

👤 JACK

Memorable Date

01-Jul-2021

Reset Password

Login

Register as a Contractor

1. Enter your email address, password, and the **Memorable Answer** and **Memorable Date** you supplied when registering.

> ✓ Your memorable answer is not case sensitive, but the **Memorable Date** *MUST* be in the format 01-JAN-1900. You can also use the calendar button to select the date.

2. Click **Login**.

> ℹ If you've forgotten your password, click **Reset Password** and enter your email address. You'll receive an email to reset your login details.
>
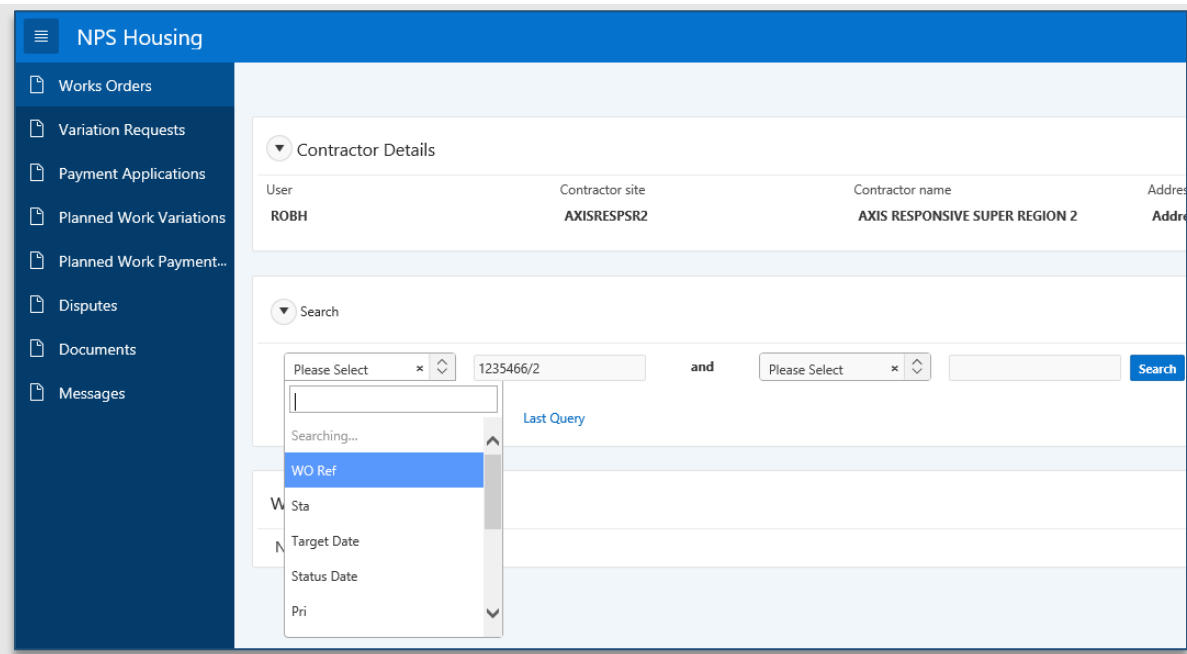> If you've forgotten your memorable data you will have to contact Peabody to reset it. **Make sure you do not lose your memorable data!**

> ℹ NEC will automatically log you out if you haven't used it in a little while.

Works orders

Jobs are assigned to you by Peabody as **works orders**. Each job has a unique works order reference number, sometimes abbreviated in NEC as **WO Ref**.

When a job is issued to you, you'll receive an email with full details and the works order reference number. In NEC you can search for a job by its reference number or see a list of all jobs issued to you.

Search for a job by reference number
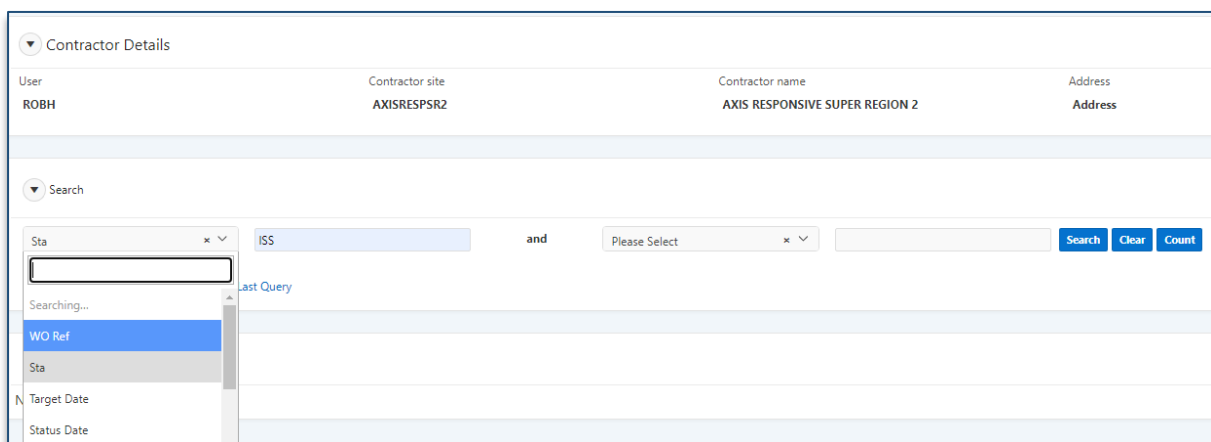
1. Click **Works Orders** from the menu on the left.

2. In the centre panel, click the **Please Select** dropdown menu under **Search**

3. Select **WO Ref** from the list.

4. Type the reference number into the search box to the right.

5. Press **Enter** or click the **Search** button.

Show all works orders issued to you

1. Click **Works Orders** in the left menu.

2. Click the **Please Select** dropdown menu beneath **Search.**

3. Select **Sta** (this means Status)

4. Type **ISS** in the search box (this means *ISSued*). It is not case sensitive.
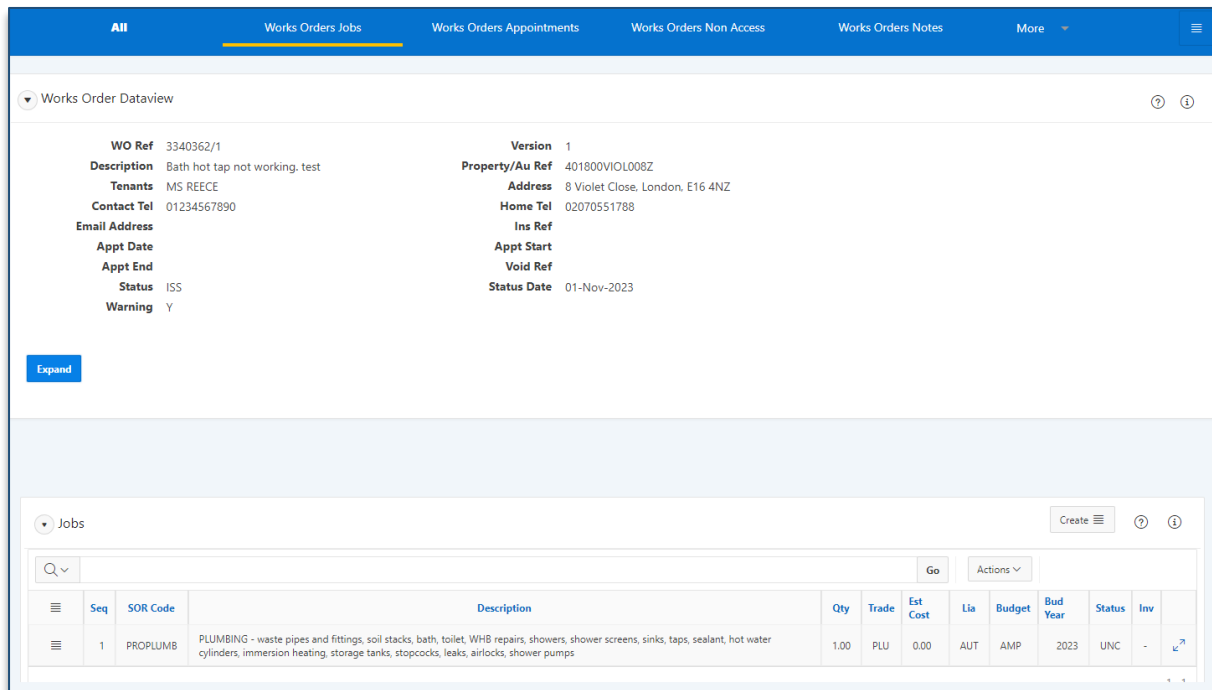
	Other statuses you can search for:	**CAN** - Cancelled
	RAI - Raised	**HLD** - On hold
	IVR - Variation request while issued	**CLO** - Closed and invoiced paid
	CVR - Variation request while completed	**COM** - completed orders

5. Press **Enter** or click **Search.**

	Any work order subject to variations, with the statuses **IVR** or **CVR**, will need to be authorised by Peabody before further processing is allowed.

View a works order

To see details of a works order, search for it and click the **works order number** in the search results.

This is a works order. It shows the following:

- **WO Ref** - reference number
- **Description** of the problem, as reported by the customer
- **Tenants**, the main tenants at that address
- **Address**
- **Contact Tel** is the number to call to talk to the customer, if not available try **Home Tel**, if any.
- **Status** is the current job status, as mentioned previously.
- **Warning** – if warning says Y, be aware there is an important alert about the resident in the Notes section (we'll look at this later).
- **Status Date**, the date it was reported.

More information is available by clicking the **Expand** button.

This gives more details about the job, particularly the **Location** of the problem within the property.

Works order job details

Job details are listed further down the page. You can also click **Works Order Jobs** from the blue menu at the top of the page.

The **Jobs** section shows the **SOR Code** (Schedule of Rates), and a **Description** of the job.

Works order notes

To see notes click **Works Order Notes** from the blue menu.

Notes include information like:

- Any **risks** within the property such as asbestos.

- Preferred customer contact **phone numbers.**

- Notes if the is **vulnerable** or there are any **alerts**. Alerts should include more information but if you are not sure, talk to your contract manager.

> ✓ If the phone number in **Contact Tel** is different, make sure you use the one given in the notes as that's likely to be more recent.

Add a completion/progress note

You must add a note when you've completed the job, or if there's something preventing you from completing the job.
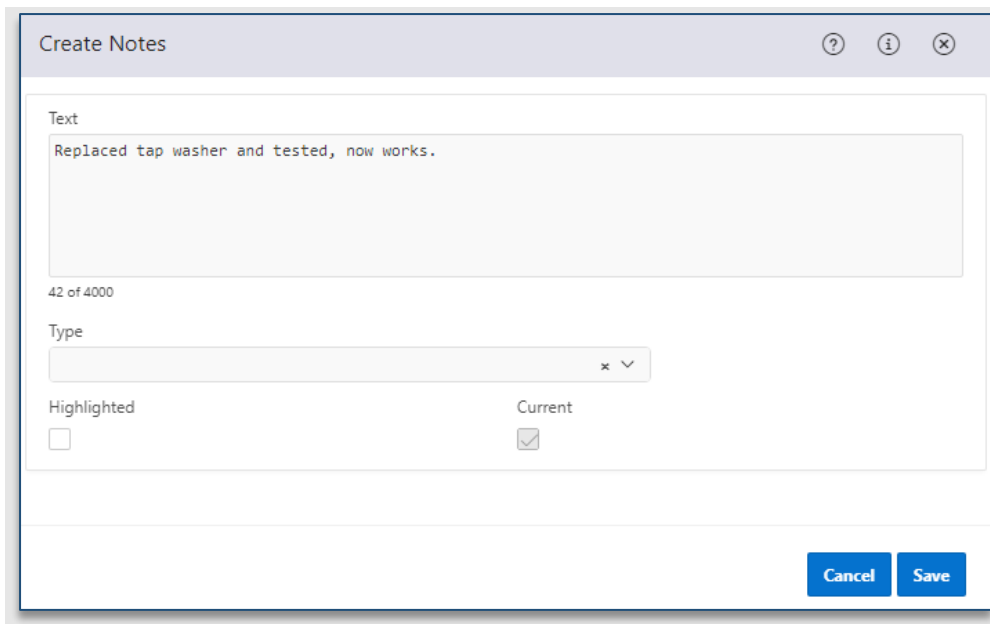
To add a new note:

1. Click the **Create** button, then **Create Notes**.

2. In the **Text** box, add your note. If this is a completion note, say what you did to complete the job.

3. **Type** is not used so ignore this.

4. Click **Save**.

> ✔ You *must* add a note before completing a works order, saying exactly what you did to complete this job. Without completion notes, Peabody will be unable to process your payment.

Add costs/vary a works order

Works orders start with a value of £1 or zero, so next you'll need to tell us the cost of the works using what's called a *works order variation*.

Sometimes you may also need to make other variations to a works order, for example if the coding is wrong, or if additional works are required.

To vary an order:

1. Search for the order by **WO Ref** number, or view your list of jobs by status.
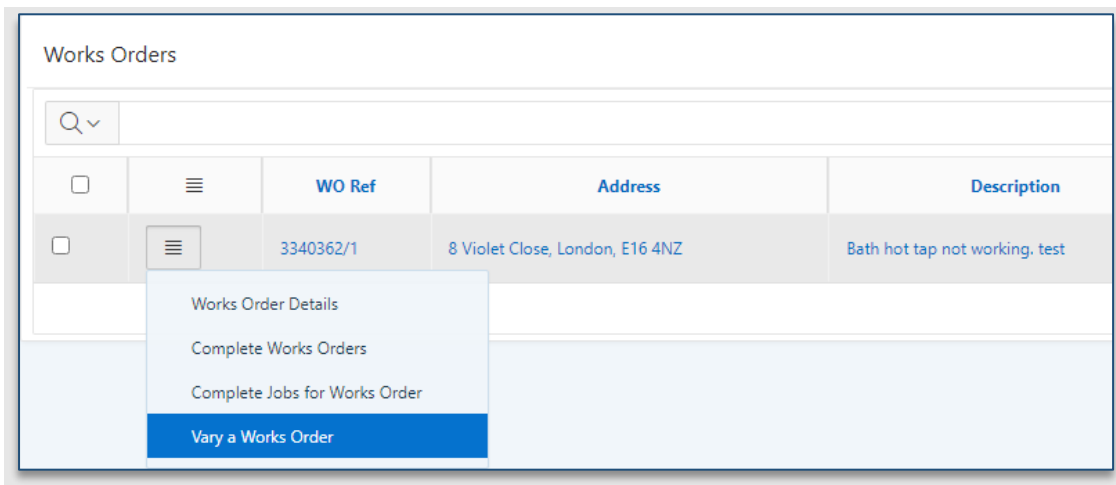
2. Click the ☰ **Row Action** button next to your order.
3. From the context menu, pick **Vary a Works Order**.

> ℹ️ If you are already viewing a works order, click the ☰ **Actions & Links** button on the right of the blue submenu, and select **Vary a Works Order**.

4. Pick a **Reason code** from the dropdown list. If it's simply add your costs or extra work is needed, selection *ADDITIONAL WORKS REQUIRED.* Or whichever code from the list matches your reason.

5. Enter **Comments** is you need to explain extra works that might be needed, or if the job is different from the original description.

6. This table deals with **SOR** codes, or *schedule of rates*.

If the job is raised with a code beginning *PRO-* or *COM-*, and has an **Est***imated* **Cost** value of zero:

- Change the **SOR** code to an appropriate costed code assigned to your contract. This could be a National Housing Federation (*NHF*) SOR code, one of Peabody's bespoke £1 value *PEA-* codes, or a bespoke code assigned to you at contract set-up. The code you choose must reflect the work you've undertaken.

- If you've selected a *PEA* code with an **Est Cost** of £1, change the **Quantity** to however many pounds the job costs.

- If you've selected an *NHF* or bespoke code, change the **Quantity** to however many costed units the job is. Eg if it's two taps costing £50 with the code TAPREP, just enter 2.

If your job is raised with a *PEA* code with an **Est Cost** of £1:

- Change the **Quantity** to however many pounds the job costs.

If your job is raised with a costed National Housing Federation (*NHF*) SOR code, or a bespoke code assigned to you at contract set-up:

- Change the **Quantity** to however many costed units the job is. Eg if it's two taps costing £50 with the code TAPREP, just enter 2.

To change a SOR code:

- If you know the code, click the **SOR** field, type the code into the box, and press TAB.
- To search for a code, select the ▤ picker button next to it and used the search feature.

7. Update the **Location** of the job within the property if needed, using the dropdown menu.
8. If you need to add additional SOR codes for additional works, click **Add Row** or the **+ button** to add another line.
9. As before, add the correct **SOR** code, **Description**, **Quantity** and **Location**.
10. Repeat this for all SORs you need to add to the order.
11. Click **Save**.

If your variation involves a significant increase in cost, discuss this with your contract manager who may need to approve it.
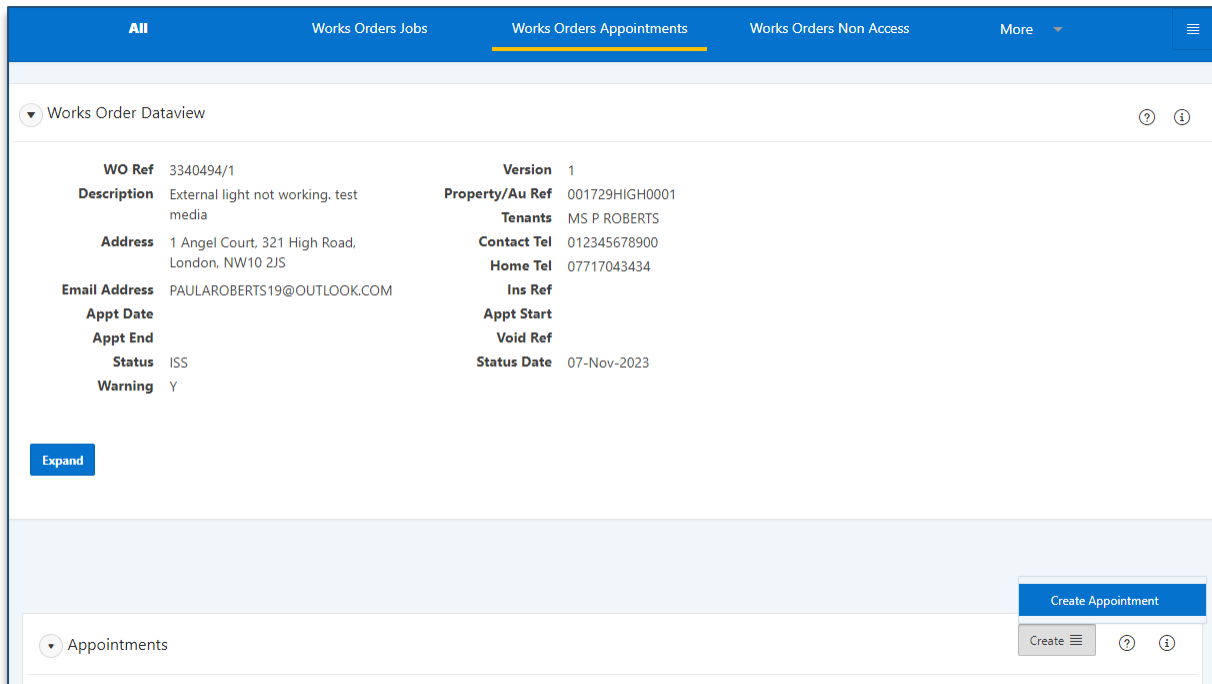
Appointment with resident

For most contractors, you should make an appointment with the resident using the contact method mentioned in the Notes section.

If your contractual agreement specifies that you need to add appointment details in NEC, you need to add this in the **Works Order Appointment** section.

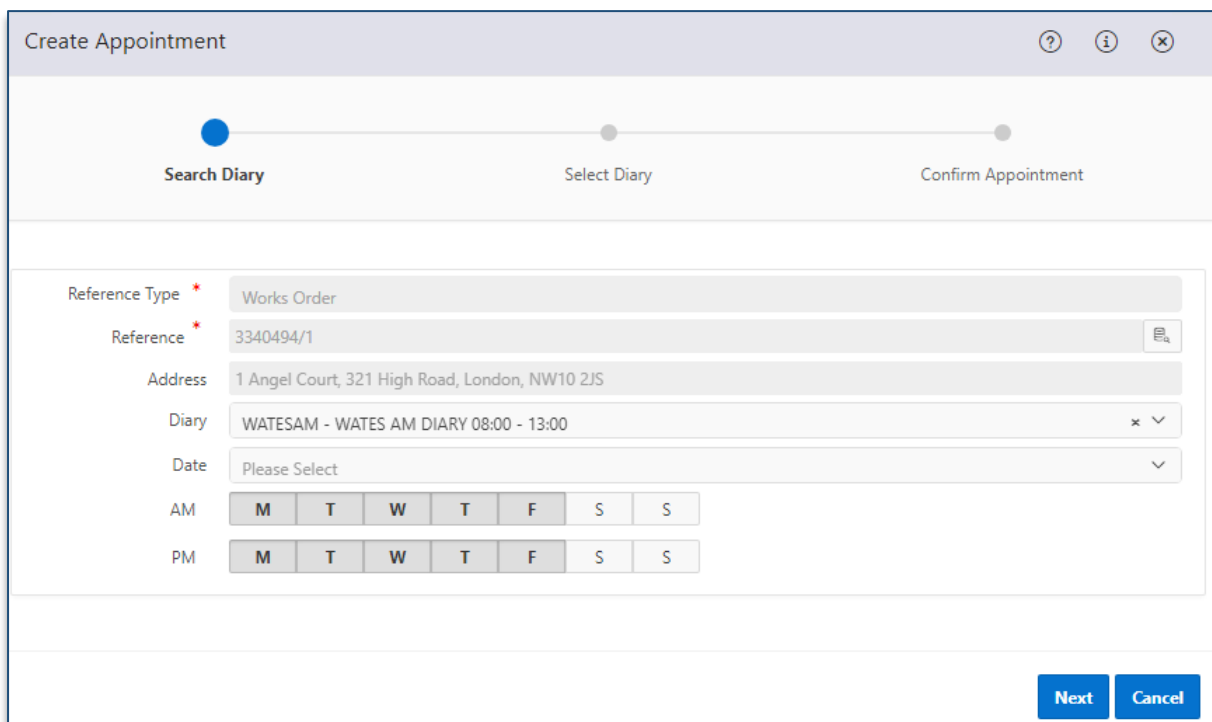If not, you don't need to record appointment details in NEC, so skip to the next part, *Complete a works order*.

Add details of a new appointment

Once you've agreed an appointment date with the resident, record the appointment details in NEC:

1. Click **Works Orders Appointment** on the blue submenu.

2. In the **Appointments** area, click **Create**, then **Create Appointment**.

3. In **Diary**, select the time slot from the dropdown list.

4. In **Date**, type or select the date.
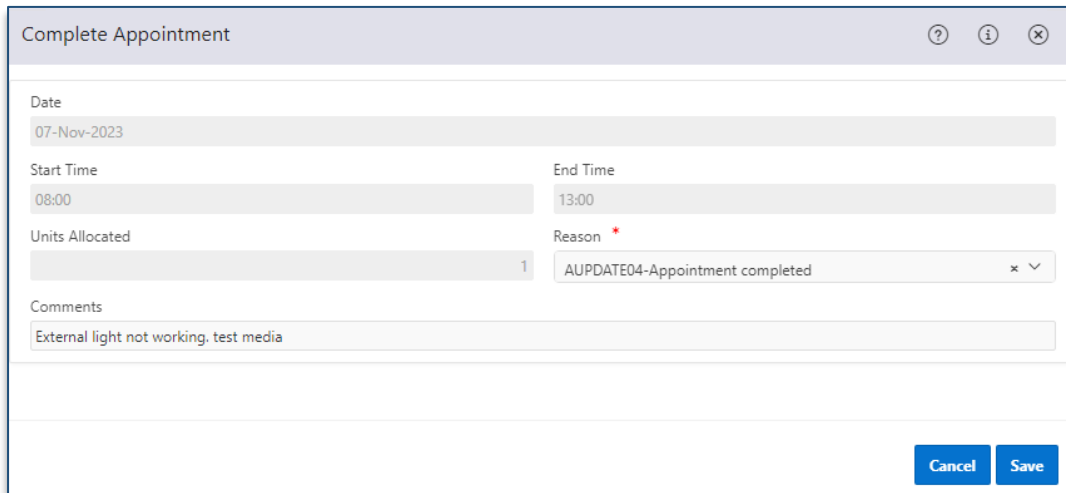
5. Click **Next**.

6. Pick **Start Time** from the dropdown list.

7. In **Number of Units** enter 1.

8. In **Reason**, select *Appointment created* for a first visit, *Follow-on visit* for subsequent visits, or whichever option is appropriate.

9. Click **Save**.

Complete, update or rearrange an appointment

Once you've completed the appointment, you'll need to mark it complete. To do so:

1. In the **Works Orders Appointments** section, click the row action button next to the appointment.
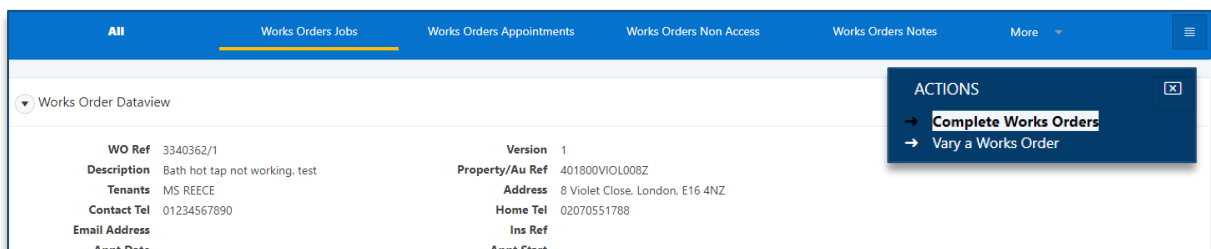

2. In **Reason**, select *Appointment completed*.

3. Click **Save**.

- If the tenant cancelled or you were unable to gain access
  - Select **Break appointment**, complete the **Reason** and add **Comments**.
- If the tenant asked to rearrange the appointment, or you need to rearrange:
  - Select **Cancel Appointment**, select an appropriate **Reason** and add **Comments**.
  - Follow the previous process to create a new appointment.
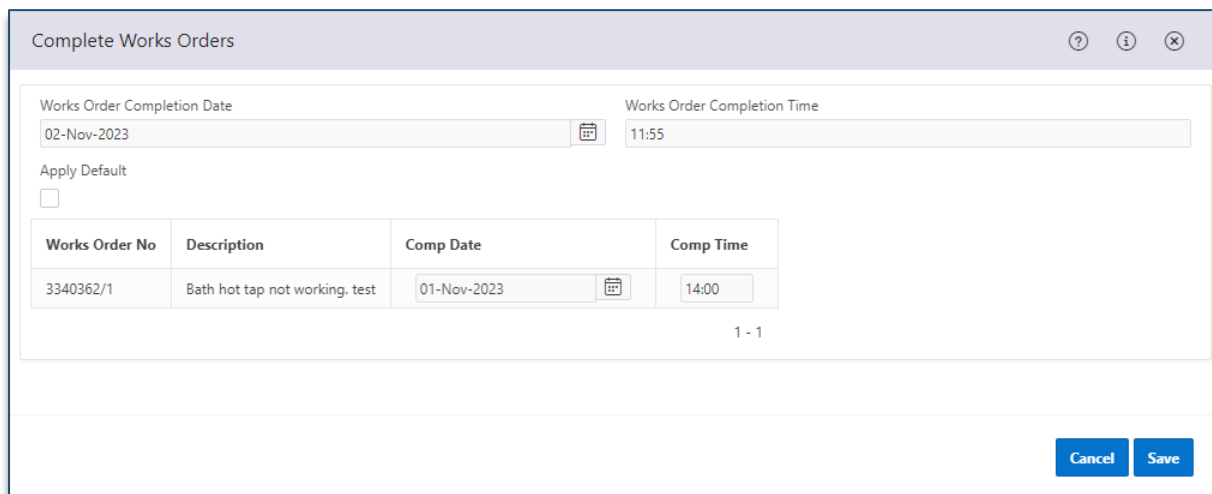
Complete a works order

Once you've finished a job you need to mark the works order as complete.

1. Search for your order by **WO Ref**.

2. In **Works Order Notes,** create a new completion note saying what you did to complete the job (see previous).

3. Click the ☰ **Actions & Links** button on the right of the blue submenu, and select **Complete Works Orders** from the context menu.

4. The **Works Order Completion Date** and **Time** defaults to right now. Change this to the time and date you actually completed the job.

5. Click the **Apply Default** tickbox, and your chosen date and time will be copied to **Comp Date** and **Comp Time** beneath.

6. Click **Save**.

7. The works order now has the **Status** COM, *completed*.

> ❗ Remember: If you haven't add a **completion note** saying exactly what you did to complete this job, Peabody will not process your payment until you've given this information.
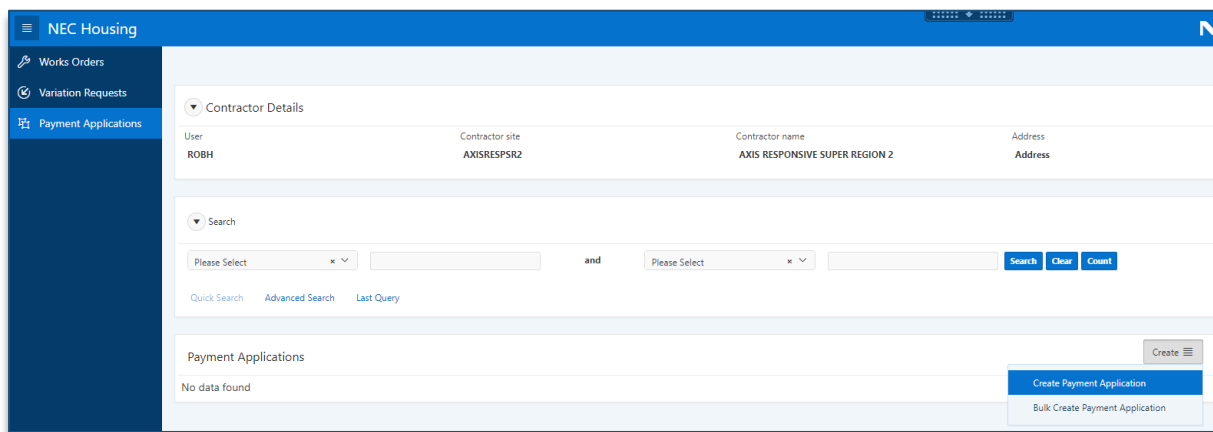
Apply for payment

To get paid for a completed job you need to do two things in NEC:

- Create a **Payment Application**
- Update your payment application and link it to an existing **Works Order**.
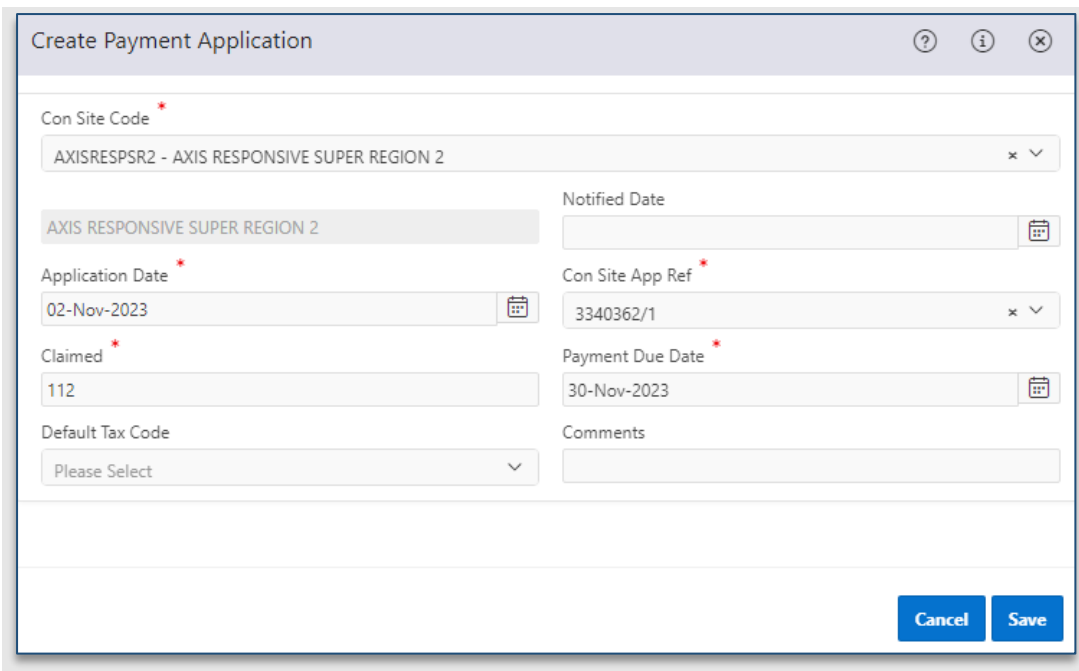
Create a Payment Application

To apply for payment for a completed works order:

1. In the main menu on the left, click **Payment Applications**.
2. In the **Payment Applications** area, click the **Create** button.
3. Select **Create Payment Application** from the context menu.

> **!** Do not use the *Bulk Create* option unless agreed with your contract manager.

Create Payment Application ⓘ ⓘ ⊗

Con Site Code *

AXISRESPSR2 - AXIS RESPONSIVE SUPER REGION 2   × ⌄

AXIS RESPONSIVE SUPER REGION 2

Notified Date

📅

Application Date *

02-Nov-2023   📅

Con Site App Ref *

3340362/1   × ⌄

Claimed *

112

Payment Due Date *

30-Nov-2023   📅

Default Tax Code

Please Select   ⌄

Comments

Cancel   **Save**

4. Enter your contract site code in **Con Site Code**, or use the picker button to select from a list. You'll only be able to see your own site codes. This must match the site code used on the works order.

5. Select **Application Date**, this should usually be today.

6. **Con Site App Ref** is your unique reference number for this payment claim. Usually it's best to use the NEC **works order number**, though you may wish to use a unique reference number from your own system.
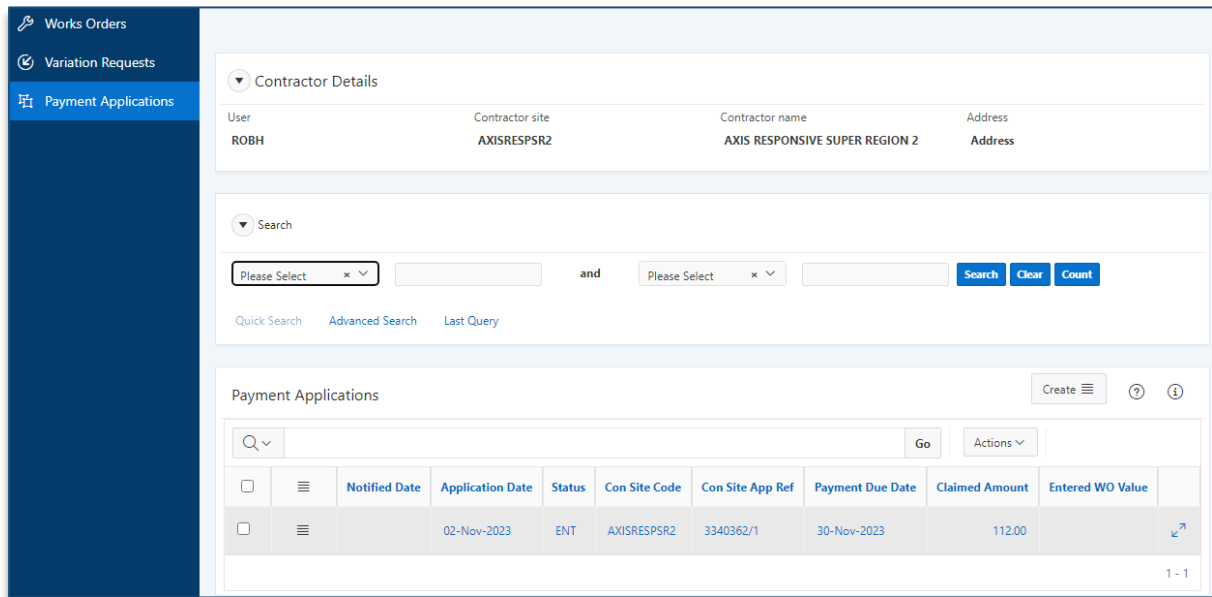
> ⓘ If for any reason your payment application is rejected and cancelled, you'll have to create a new application, but you won't be able to use the same works order number as application references need to be unique.
>
> Instead, add an extra character to the works order, eg 12557771/1*A*, so it's still easy to identify which order the application is for.

7. **Claimed** is the payment amount in pounds.

8. By default, **Payment Due Date** is 30 days from now.

9. **Default Tax Code** can be left blank.

10. Add any **Comments** if necessary.

11. Double check the details of your claim, then click **Save**.

Your claim has now been saved, and you'll be returned to the search page.

Link your payment application to a works order

If you've just created a new application, it may be shown on the **Payment Applications** page.

Otherwise you'll have to search for applications.

Find all entered applications
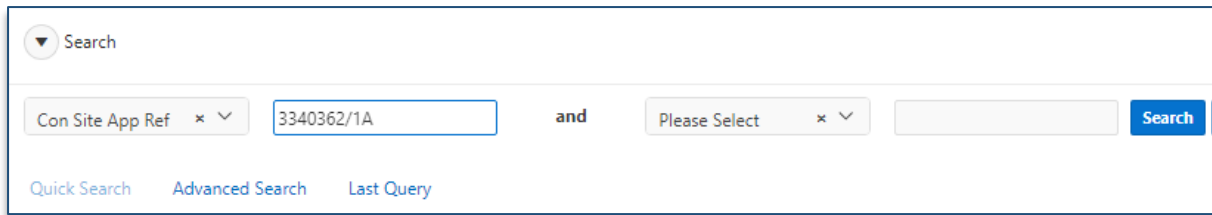
To see a list of all entered applications:

1. Click Please Select, and pick **Sta** (Status).
2. Type "ENT" in the search box, meaning **applications entered**.
3. Click **Search**.

Find a specific application

You can also find a specific application by searching for its unique reference number, usually the WO Ref:

1. Click **Please Select**, and pick **Con Site App Ref**.
2. Enter the unique reference number in the search box.
3. Click **Search**.

It's likely your application will be on this page, but you can also search for a specific application using the unique **Con Site App Ref**. Remember, his is usually the **WO Ref**.
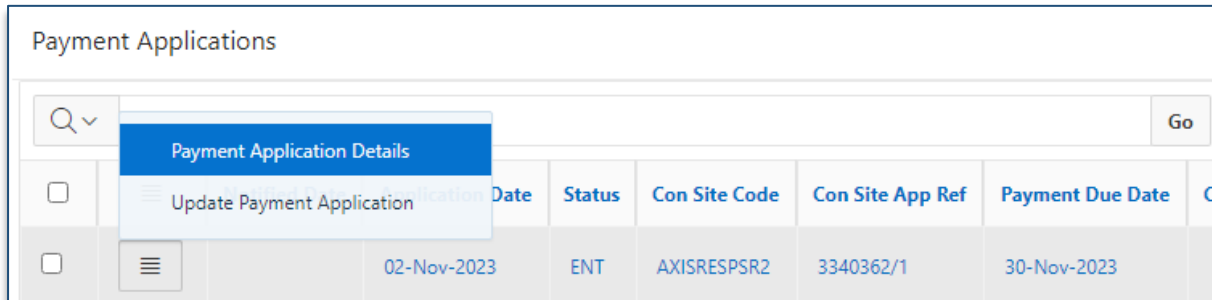
Once you've found the application:
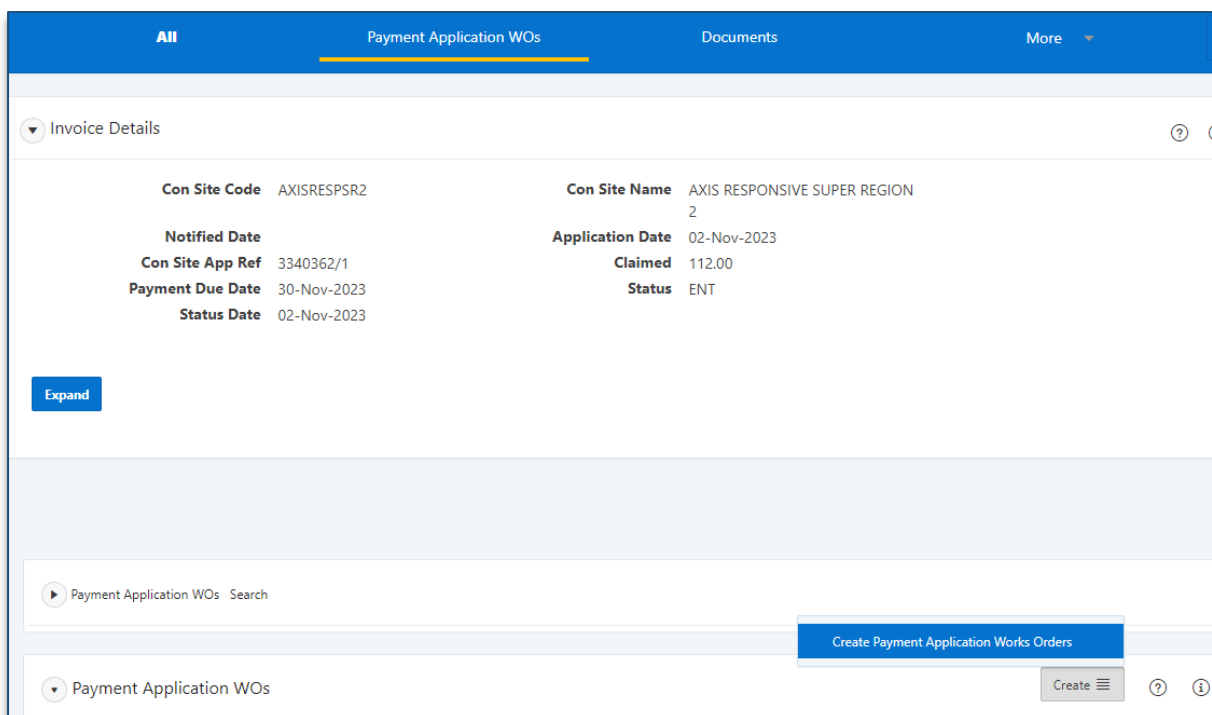
1. Click any blue text in the search results. Or click the ☰ **Row Action** button, then select **Payment Application Details** from the context menu.

2. **Payment Application WOs** should be selected in the top submenu, if not select it now.

3. In the **Payment Application WOs** area below, click the **Create** button, then select **Create Payment Application Works Orders**.

Create Payment Application Works Orders

WO Ref	Current WO Cost	WO Sta	App Status	Net App Cost	Tax App Cost	Match	Ins
3340362/1	0.00	COM		0.00	0.00	Y	☐

Add Row   Cancel   Save

4. Enter the **WO Ref** (works order number). Press TAB on your keyboard or click in a white space, and the works order details will appear automatically.

5. The **Current WO Cost** will be zero at this stage, but make sure **WO Sta** (status) is **COM**plete. You won't be able to claim for incomplete work.

6. If you're claiming for more than one order click **Add Row**, and enter another works order number.

7. When you're done, click **Save**.

> ℹ️ If you get an error message at this point, check:
>
> - You have the right **WO Ref** number.
> - Your work order(s) must have the status **COM**, for complete. You can't claim for incomplete works orders.
> - Any variations have been approved by Peabody.

Your Payment Application is now complete, and you should receive payment in the standard 28 days.