



**The Scottish Property Factor Register**

# **Property Factors (Scotland) Act 2011**

## **Guide to Registration**

**Version 4  
March 2018**

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Additional guidance is available from the Scottish Government website to support the bulk upload of property portfolio information to be requested at Stage 2.

<http://www.gov.scot/Topics/Built-Environment/Housing/privateowners/propertyfactors/2011Act>

# **1. BACKGROUND AND GUIDANCE**

## **A. Purpose of the Guide to Registration**

This guide is aimed at residential property factors operating in Scotland who are applying for entry onto the statutory register of property factors. The guide has two purposes:

1. It will help you to complete Stage 1 and Stage 2 of the online register by providing step-by-step instructions as well as diagrammatic 'screen shots' from the system which will help you to navigate your way through the system.
2. It will outline all stages of the process from beginning to end, providing key dates, answers to frequently-asked-questions, and contact details if further help is required.

The registration system is managed and maintained by the Scottish Government. Access the system from the following link:

[www.scotland.gov.uk/propertyfactorregister](http://www.scotland.gov.uk/propertyfactorregister)

# 1. BACKGROUND AND GUIDANCE

## B. Background

The Property Factors (Scotland) Act 2011 aims to set minimum standards of practice for the residential property and land management industry. It also aims to provide increased protection for homeowners who use the services of a property factor.

The Act does three main things:

1. Established a **compulsory register** of property factors. It is an offence to operate as a property factor without being registered and without reasonable excuse under section 12 of the Act.
2. Introduced a **Code of Conduct (the Code)**, setting out minimum standards of practice which all registered property factors are required to comply with. The Code is underpinned by the principle of transparency so that homeowners are clear about what they are paying for, how the charges are arrived at and the routes available in the event that they wish to make a complaint against their factor.
3. Created a statutory **dispute resolution mechanism**, now known as the First-tier Tribunal for Scotland (Housing and Property Chamber)\*, where homeowners can take complaints against their property factor if they believe the factor has failed to comply with the Code (as specified under section 14 of the Act) or otherwise carry out their property factor duties (as specified under section 17(5) of the Act).

**All provisions of the Act came into force on the 1 October 2012.**

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\* Previously known as the Homeowner Housing Panel from 1 October 2012 to 30 November 2016

# 1. BACKGROUND AND GUIDANCE

## C. Who Needs to Register?

Section 2 of the Property Factors (Scotland) Act 2011 provides the definition of a property factor (see Annex A).

Operating as an unregistered property factor, without reasonable excuse, is a criminal offence. All organisations which intend to operate as a property factor in Scotland are required to register on the national property factors register. Approval onto the register will be granted by Scottish Ministers.

The type of organisations that the Act applies to will include:

1. Private sector property factors
2. Registered social landlords
3. Land maintenance companies
4. Local authorities

Further advice to help you to consider your role as a property factor as well as answers to some frequently asked questions is available here:

<https://beta.gov.scot/policies/homeowners/property-factor-registration/>

### Who should fill in the online application for registration?

On the online registration system, each organisation will have one single login account. To set this up, Stage 1 of the registration process will request you to supply user account contact details.

It is up to you as the registering organisation to decide which member of staff will be named on the register as the **primary contact person for user account purposes** and to whom any future communications relating to the register are passed.

However, regardless of who is named as the main contact for user account purposes, **responsibility for making sure that the application contains full and accurate information lies with the “responsible person” as defined by section 3(9) of the Property Factors (Scotland) Act 2011.** It is an offence (under section 3(6) of the Act) knowingly to specify false information or knowingly to fail to specify the required information.

At the end of the application there is a requirement to sign (electronically) a declaration relating to the completeness and accuracy of the application. This should be completed by the **“responsible person”**.

### **Definition of Responsible Person**

In accordance with section 3(9) of the Act, the “responsible person” is either:

- Where the person making the application is a sole trader, that person – or
- In any other case, the person specified in the application by virtue of section 3(2)(c) of the Act:  
“the individual who holds the most senior position within the management structure of the partnership, company or body which is (or is to be) directly concerned with the control or governance of the property factor”.

This person should sign the registration application as the responsible person.

In the case of local authorities and housing associations, this is likely to be the Chief Executive, the Director or the most senior manager with main responsibility for the property factoring part of the organisation.

# 1. BACKGROUND AND GUIDANCE

## D. Key Dates

Date	Action
<b>3 years from date of approval of first registration</b>	<p>Registration is not automatic. All registered property factors are required to apply to register <b><u>before their current registration expires</u></b>. A new application to register must be submitted by that date or the property factor will be <b><u>automatically removed</u></b> from the register.</p> <p>If an application is submitted before the current registration expires, then the current registration is valid until the application is determined.</p> <p><b>PLEASE NOTE:</b> you can only create a new registration if the remaining period of your current registration is <b><u>3 months or less</u></b>. For example, registered property factors whose registrations expire on 1 December 2018 are able to create a new registration <b><u>from</u></b> 1 September 2018. The online register is unable to accept new applications before this threshold.</p>
<b>As soon as practicable*</b>	<p>If there is a change of information provided in the application to the property factor register as follows:</p> <ul style="list-style-type: none"> <li>• Full name and business address of the organisation</li> <li>• Company Registration Number (if applicable)</li> <li>• Trading or Legal Status</li> <li>• Change in responsible person</li> <li>• Change in relevant person(s)</li> </ul>
<b>Immediately</b>	<ul style="list-style-type: none"> <li>• Change of primary contact details including telephone and email address</li> </ul>
<b>Between 1 April – 30 June each year</b>	<p>All registered property factors to complete the annual update of property and land submitting details online of all property and land that they have factored during the preceding financial year<sup>†</sup>.</p>

\* It is an offence to knowingly specify false information in an application to enter the register or when making subsequent changes to that information. It is also an offence for a registered property factor to fail to provide notice to Scottish Ministers of any changes in information specified in an application as soon as practicable after the inaccuracy arises.

<sup>†</sup> Annual Update of Properties and Land Portfolio: Guidance - [https://beta.gov.scot/publications/property-factors-scotland-2011-act-annual-update/Property%20Factor%20Register%20-%20Guidance%20-%20Annual%20Update%20-%20User%20Guide%20-%20Version%205%20\(3\).pdf?inline=true](https://beta.gov.scot/publications/property-factors-scotland-2011-act-annual-update/Property%20Factor%20Register%20-%20Guidance%20-%20Annual%20Update%20-%20User%20Guide%20-%20Version%205%20(3).pdf?inline=true)

# 1. BACKGROUND AND GUIDANCE

## E. Considerations for Approval

Section 5 of the Property Factors (Scotland) Act 2011 states that Scottish Ministers must consider certain information in order to decide if a person is a fit and proper person to be a property factor. Section 5(2) of the Act lists the material to be considered, and the Property Factors (Registration) (Scotland) Regulations 2012 set out specifically what is to be supplied as part of an application for registration.

As part of Stage 2 of the online registration process, you will be asked to supply this “Fit and Proper Person” information.

### Who must supply “fit and proper person” information?

As part of the online registration process, the responsible person and any relevant person(s) will be asked to supply “Fit and Proper Person” information (see table below). The definition of Responsible Person is given in the text box on **page 6** of this Guide. The definition of Relevant Person is given in the text box on **page 9**.

#### FIT AND PROPER TEST

An application must specify:

- any conviction<sup>\*</sup> of any person who is (or is to be) directly concerned with the control and governance of the property factor, who has been convicted of any offence involving:
  - fraud or other dishonesty
  - violence or
  - drugs
- any court or tribunal judgment against a relevant person under Equality Act 2010:
  - the Equal Pay Act 1970
  - the Sex Discrimination Act 1975
  - the Race Relations Act 1976
  - the Disability Discrimination Act 1995
  - the Employment Equality (Sexual Orientation) Regulations 2003
  - the Employment Equality (Religion or Belief) Regulations 2003
- contraventions with any provision in the law relating to tenements, property or debt:
  - Any conviction of a offence<sup>†</sup>; or
  - Any finding of a court or tribunal<sup>‡</sup>

<sup>\*</sup> An applicant is not obliged to disclose any information related to a spent conviction (in accordance with section 4(3) of the Rehabilitation of Offenders Act 1974 (c.53)).

<sup>†</sup> This includes convictions listed in the Property Factors (Scotland) Act 2011 such as failing to comply with a Property Factor Enforcement Order (PFE0), knowingly providing false information to the register, not specifying information required on the register, failing to notify the Registration Team as soon as practical of a change in circumstances, failing to complete the annual update of property and land between 1 April and the 30 June each year, operating as a property factor whilst unregistered, and any person other than a registered property factor using a property factor registered number without being registered.

<sup>‡</sup> This includes failing to comply with the Code of Conduct and a Property Factor Enforcement Order (PFE0).



### **Definition of Relevant Person**

In accordance with regulation 2 of the Property Factors (Registration) (Scotland) Regulations 2012, a “relevant person” is:

“Any person who is (or is to be) directly concerned with the control or governance of a property factor who is-

- (a) trading as a sole trader;
- (b) mentioned in section 3(2)(c) of the Act; or
- (c) mentioned in section 3(8) of the Act”

Parts (a) and (b) of the definition above relate to the definition of the Responsible Person. I.e the definition of a “Relevant Person” includes the Responsible Person.

Part (c) of the definition above relates to “any other person who is (or is to be) directly concerned with the control or governance of the property factor” and this is noted to include “any person who owns 25% or more of the equity in a business which is a property factor”.

# 1. BACKGROUND AND GUIDANCE

## F. Property and Land Portfolios



At Stage 2 of the online registration process, if you already act as a property factor, you will be asked to supply details of the properties and land in relation to which you act as property factor. This is in line with section 3(2)(e) of the Property Factors (Scotland) Act 2011.

If you **do not** maintain any property/land at the present time, you do not need to complete this part of the registration process.

There are two options for entering the data within the system – manual entry or bulk upload (see **page 22** for more information).

### Properties

“Properties” in this context means individual flats or houses, not whole developments. So, for example, if you manage three blocks of flats, each block containing 10 flats, then you would have 30 properties to list.

For land-owning land maintenance companies, this would mean listing all individual houses/flats where the owners are obliged by their title deeds to pay for the land maintenance in the properties section ( Properties). In these cases, you would also supply a land list (see below) in the land section ( Lands) of the register.

For local authorities/registered social landlords managing mixed-tenure blocks: Where you are the property factor for a block/development and you own some of the properties but not all and therefore you share responsibility for the common parts with other owner(s), include all the properties in that block/development in the list you supply. Do not include blocks/developments where you are the sole owner – ie which are entirely social rented tenure (**see Annex B**).

Commercial properties – if you manage commercial properties, you would include these in your list only if those properties share common parts with residential properties. For example, if there were shops below flats and those shops shared responsibility for the common parts of the building (eg roof, stairwell) then the addresses of those shops should be included.

### Land

If any land managed is entirely within the curtilage of the buildings managed – eg private gardens shared by the proprietors – then you don’t need to supply a separate list of land managed. Listing all the property addresses will cover this.

You should supply a list of land managed where that land is outside the immediate gardens of the buildings - such as where there is open ground that is either owned by the homeowners collectively, or is owned by you but where the homeowners have obligations in their title deeds to pay for the upkeep of the land.

When recording information in relation to land, only one record is required per development. One development may include several pieces of land that are maintained by the property factor.

# 1. BACKGROUND AND GUIDANCE

## G. Registration Fees

All registering property factors are required to pay a fee on registration. The fee once paid will last for the three-year period of registration.

Registration fees are currently set at the following levels\*:

- £200 registration fee – for property factors with a portfolio size of 100 or fewer properties
- £750 registration fee – for property factors with a portfolio size of more than 100 properties

The fee will only be calculated on the number of properties that the property factor does not own. For example, a factor may manage 150 properties of which 50 properties are owner occupied. The fee would therefore be calculated using the lower rate. The requirement to provide full details of portfolio and land managed (outlined at Section F) will remain unchanged.

If the application is approved at Stage 2, then an invoice in relation to registration fees will be emailed to the primary contact and posted to the address listed on the register. On receipt of the invoice, payment can be made via:

- BACS or CHAPS
- Debit card via Internet
- By Cheque
- GBS Transfer

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\* The Property Factors (Registration)(Scotland) Amendment Regulations 2015:-  
<http://www.legislation.gov.uk/ssi/2015/217/contents/made>

## 1. BACKGROUND AND GUIDANCE

### H. Contact us

The online register can be accessed at:

[www.scotland.gov.uk/propertyfactorregister](http://www.scotland.gov.uk/propertyfactorregister)

This Guide, along with other information and updates about the Property Factors Act, is available on the Scottish Government website:

<http://www.gov.scot/Topics/Built-Environment/Housing/privateowners/propertyfactors/2011Act>

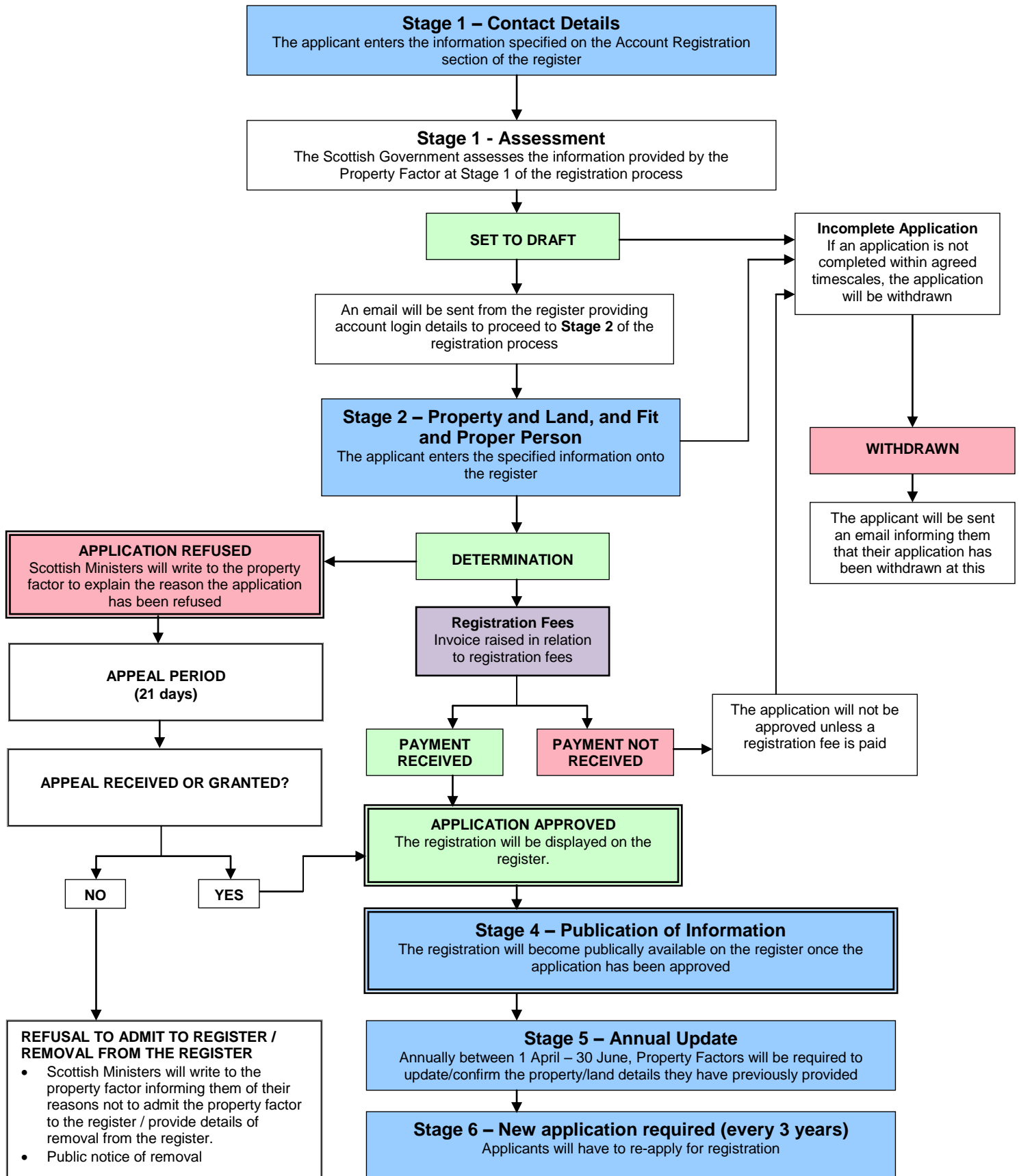
Contact the registration team using the details below:

Email: [propertyfactorregister@gov.scot](mailto:propertyfactorregister@gov.scot)

Telephone: 0131 244 9965

# 1. BACKGROUND AND GUIDANCE

## I. Outline of the Application Process - Flowchart



## 2. STEP-BY-STEP INSTRUCTIONS TO REGISTER – STAGE 2

### A. Accessing the Register

If you have received an email from [PropertyFactorRegister@gov.scot](mailto:PropertyFactorRegister@gov.scot) with a temporary password and login details as listed below, you can now complete the remainder of your application for the Property Factor Register.

#### Sample Email Confirmation

Dear Property Factor

Your Property Factor account has now been authorised. You can now login using the link below and complete the remaining stages of your application to the Property Factor Register.

Please find your temporary password detailed below which you will be required to change at first login. Your username is your email address.

Your password is : lg2kCH49!2

<https://sedsh119.sedsh.gov.uk/propertyfactorCMS>

A copy of the Guide to Registration, which will guide you through all the stages of the process, can be downloaded from <http://www.gov.scot/Resource/0049/00490628.pdf>

Kind Regards

The Property Factor Register

[www.scotland.gov.uk/propertyfactorregister](http://www.scotland.gov.uk/propertyfactorregister)

The register can be accessed from the following link:

<https://sedsh119.sedsh.gov.uk/propertyfactorCMS/>

1. You will be required to enter a **username** and **password** as follows:

Username:	This is the email address that you entered on the register when you completed Stage 1 of the registration process. This is also the same email address that your temporary password was sent to.
Password:	Enter the password that was sent to your email address from the <a href="mailto:PropertyFactorRegister@scot.gov.uk">PropertyFactorRegister@scot.gov.uk</a> mailbox. You may find it easier to copy and paste this into the password box.

**Property Factor Portal Login**

Username

Password

[Forgotten your Password?](#)

## 2. STEP-BY-STEP INSTRUCTIONS TO REGISTER – STAGE 2

2. At this point, you will be required to change this password. Your new password must contain between 8 and 16 characters, should contain at least one uppercase and one lowercase character, one numerical and one non-alphanumeric character.



**Property Factor Portal Login**

Username  
propertyfactorregister.gov.sco

Password

Login

You must change your password before continuing.  
New password

Confirm New Password

Update

[Forgotten your Password?](#)

Once you are in the register, you will see the following screen. You will now have several tasks to complete by clicking through the **navigation menu** on the left hand side:



Font Size [A](#) [A](#) [A](#) [Help](#) [Contact Us](#)

You are here: [Home](#)

**Welcome Case Worker 2 (PF000095)**

Thursday, August 23, 2012

**Items requiring your attention**

Draft Registrations: no records.

**REGISTRATIONS EXPIRING**

Company Name	Town	Trading Type	Date Fee Paid	Days To Expiry	Expiry Date	Edit View
Cameron Properties	town	Limited Company				<a href="#">Edit</a> <a href="#">View</a>


1

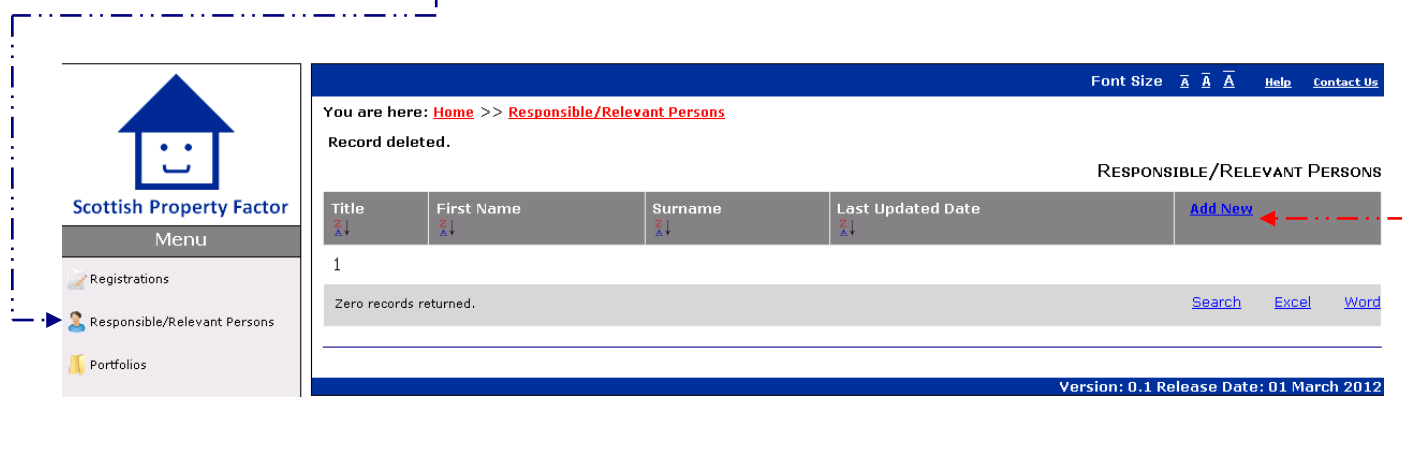
Records 1 to 1 of 1 [Search](#) [Excel](#) [Word](#)

## 2. STEP-BY-STEP INSTRUCTIONS TO REGISTER – STAGE 2

### B. Responsible/Relevant People

You will find a definition of a Responsible/Relevant Person on **page 6 and 9** of this guide.

1. Click on the  Responsible/Relevant Persons icon on the left hand side of the menu.



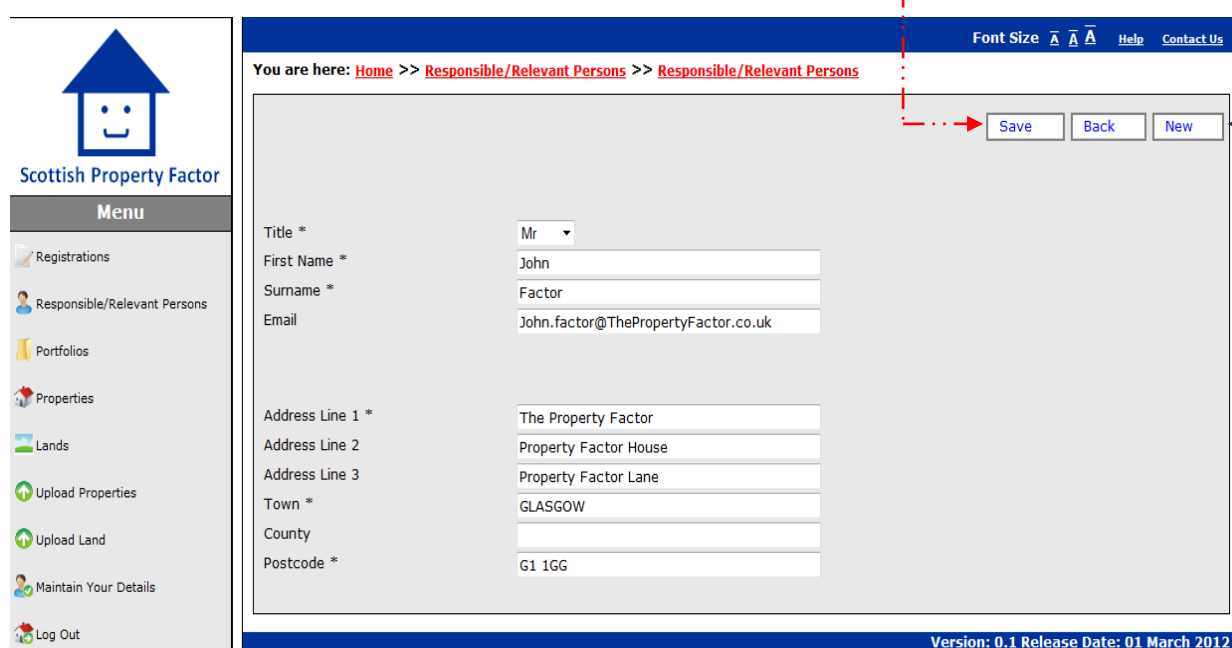
The screenshot shows the 'Scottish Property Factor' menu on the left with 'Responsible/Relevant Persons' selected. The main content area displays a table titled 'RESPONSIBLE/RELEVANT PERSONS' with columns: Title, First Name, Surname, Last Updated Date, and an 'Add New' button. Below the table, it states 'Zero records returned.' and provides links for 'Search', 'Excel', and 'Word'. The footer indicates 'Version: 0.1 Release Date: 01 March 2012'.

2. Once you are in this section, click on the [Add New](#) icon on the right hand side of the screen.

Fill in the fields as specified below (any field that is denoted with a \* is mandatory and must be completed).

3. Once you have completed this section, click on .

4. If you need to add any additional relevant people, click on  to add a new record.




The screenshot shows the 'Add New' form for 'Responsible/Relevant Persons'. The form includes fields for Title (\*), First Name (\*), Surname (\*), Email, Address Line 1 (\*), Address Line 2, Address Line 3, Town (\*), County, and Postcode (\*). The example data provided is: Title: Mr, First Name: John, Surname: Factor, Email: John.factor@ThePropertyFactor.co.uk, Address Line 1: The Property Factor, Address Line 2: Property Factor House, Address Line 3: Property Factor Lane, Town: GLASGOW, Postcode: G1 1GG. The form also features 'Save', 'Back', and 'New' buttons. The footer indicates 'Version: 0.1 Release Date: 01 March 2012'.

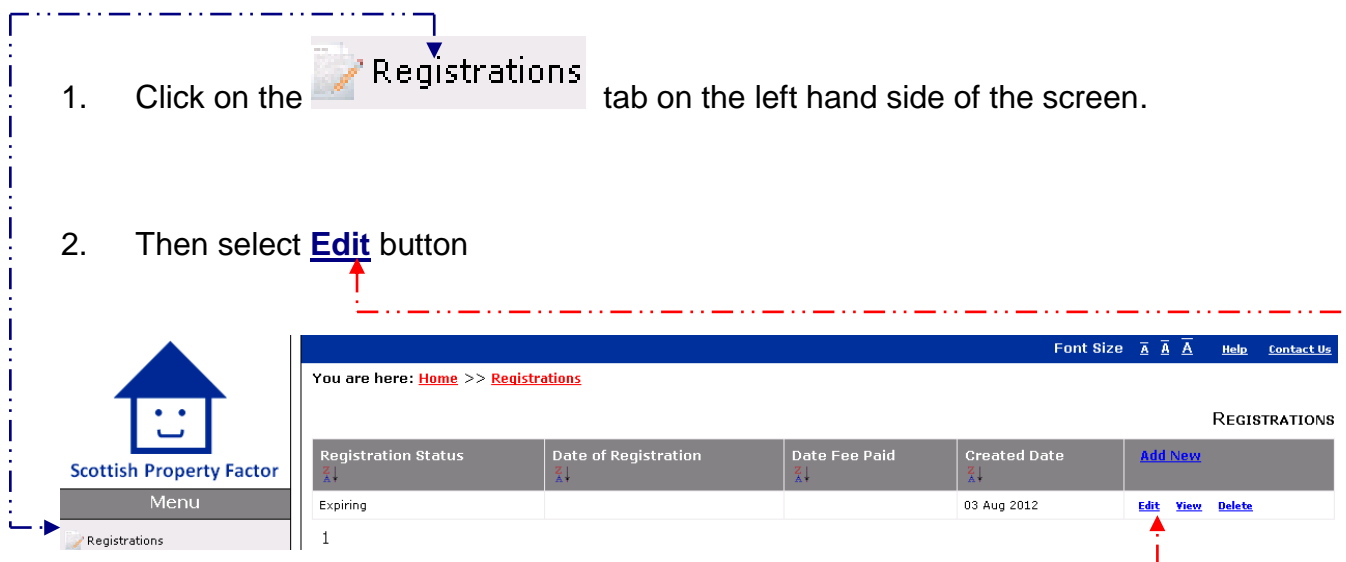


## 2. STEP-BY-STEP INSTRUCTIONS TO REGISTER – STAGE 2

### C. Fit and Proper Person Test

Once the Responsible and Relevant People (if applicable) have been added to the register, a fit and proper test will need to be completed from the registration screen as follows:

1. Click on the  **Registrations** tab on the left hand side of the screen.
2. Then select **Edit** button



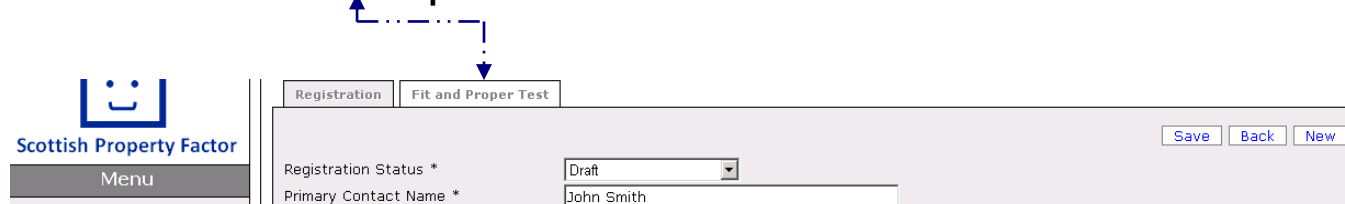
Font Size [A](#) [A](#) [A](#) [Help](#) [Contact Us](#)

You are here: [Home](#) >> [Registrations](#)

REGISTRATIONS

Registration Status	Date of Registration	Date Fee Paid	Created Date	<a href="#">Add New</a>
Expiring			03 Aug 2012	<a href="#">Edit</a> <a href="#">View</a> <a href="#">Delete</a>

3. Click on the **Fit and Proper Test** tab.



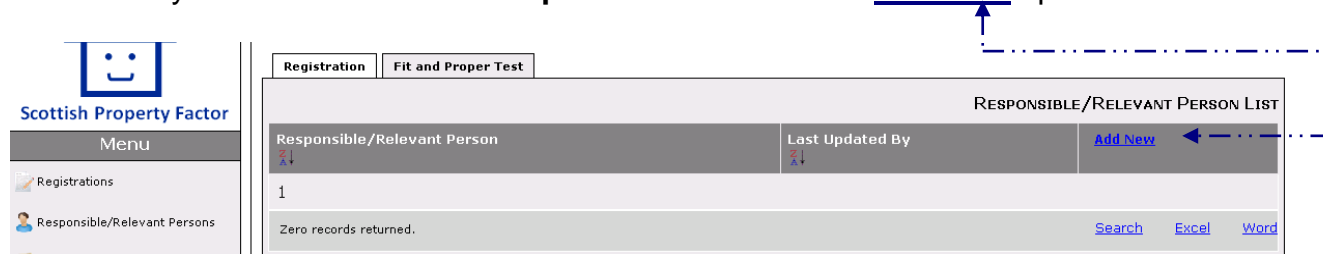
Registration Fit and Proper Test

Save Back New

Registration Status \* Draft

Primary Contact Name \* John Smith

4. Once you are in the **Fit and Proper Test** tab select the **Add New** option.



Registration Fit and Proper Test

RESPONSIBLE/RELEVANT PERSON LIST

Responsible/Relevant Person	Last Updated By	<a href="#">Add New</a>
1		

Zero records returned. [Search](#) [Excel](#) [Word](#)

## 2. STEP-BY-STEP INSTRUCTIONS TO REGISTER – STAGE 2

5. From the drop down menu, select a **responsible/relevant** person (see **page 16** for information on how to add responsible/relevant people)

**Responsible Person Registration**

Responsible Person Registration      Responsible/Relevant Person Record

Save    Back    New

Responsible/Relevant Person \*    Mr John Factor

Responsible Person Type    Relevant Person

Status \*    Draft

Have you previously acted/or are currently acting as a responsible/relevant person for another property factor organisation? ☒

6. Select a **Responsible Person type**. There are two options in this drop down menu which are:

Responsible Person (see <b>page 6</b> )	There can only be <b>one</b> responsible person
Relevant Person (see <b>page 9</b> )	There can be <b>multiple</b> relevant people

7. If you have previously acted/or are currently acting as a responsible/relevant person for another property factor organisation, please tick the following **box**:

Responsible/Relevant Person \*    Mr John Factor

Responsible Person Type    Relevant Person

Status \*    Draft

Have you previously acted/or are currently acting as a responsible/relevant person for another property factor organisation? ☒

8. The online fit and proper test consists of a series of questions. Please check the **box** if anything on this list is applicable and provide further details in the box below. If nothing on the list is applicable, do not check the box and leave the page blank:

**Responsible Person Registration**

Responsible Person Registration      Responsible/Relevant Person Record

Save    Back    New

Responsible/Relevant Person \*    Mr John Factor

Responsible Person Type    Relevant Person

Status \*    Draft

Have you previously acted/or are currently acting as a responsible/relevant person for another property factor organisation? ☒

**(Tick all applicable boxes, and specify further details where a box has been ticked):**

**a) Has the Responsible/Relevant Person named above been convicted of any offence involving:**

Fraud or Other Dishonesty    ☐ (check to indicate Fraud Or Other Dishonesty convictions)

Specify details

Violence    ☒ (check to indicate Violence convictions)

Specify details    2005 - Breach of the peace

Drugs    ☐ (check to indicate Drugs convictions)

Specify details

**b) Has the Responsible/Relevant Person named above had any court or tribunal judgments against him/her under any of the following:**

## 2. STEP-BY-STEP INSTRUCTIONS TO REGISTER – STAGE 2

9. The series of questions the Responsible and Relevant Person will be asked are as follows:

- a) Has the Responsible/Relevant Person named above been convicted of any offence involving:
  - Fraud or Other Dishonesty
  - Violence
  - Drugs
- b) Has the Responsible/Relevant Person named above had any court or tribunal judgments against him/her under any of the following:
  - The Equality Act 2010
  - The Equal Pay Act 1970
  - The Sex Discrimination Act 1975
  - The Race Relations Act 1976
  - The Disability Discrimination Act 1995
  - The Employment Equality (Sexual Orientation) Regulations 2003
  - The Employment Equality (Religion Or Belief) Regulations 2003
- c) In relation to a contravention of any provision of the law relating to tenements, property or debt, has the Responsible/Relevant Person named above had:
  - Any conviction of an offence
  - Any finding of a court or tribunal against him/her

10. If you have checked the following box:

Have you previously acted/or are currently acting as a responsible/relevant person for another property factor organisation? ☒

You will need to complete the **Responsible/Relevant Person Record** before you change the status from **Draft** to **Pending Approval** (see **page 20** for further details).

Responsible Person Registration	Responsible/Relevant Person Record
<p>• You must complete the "Responsible/Relevant Person Record" section before you can change the status from "Draft" to "Pending Approval"</p>	
<p>Responsible/Relevant Person * <input type="text" value="Mr John Factor"/></p> <p>Responsible Person Type <input type="text" value="Relevant Person"/></p> <p>Status * <input type="text" value="Draft"/></p>	<p>Have you previously acted/or are currently acting as a responsible/relevant person for another property factor organisation? <input checked="" type="checkbox"/></p> <p><input type="button" value="Save"/> <input type="button" value="Back"/> <input type="button" value="New"/></p>

11. If you have not checked the following box:

Have you previously acted/or are currently acting as a responsible/relevant person for another property factor organisation? ☐

Change your registration from **Draft** to **Pending Approval** then click . Then follow the instructions from **page 21**.

## 2. STEP-BY-STEP INSTRUCTIONS TO REGISTER – STAGE 2

### D. Responsible/Relevant Person Record

If the Responsible or Relevant Person is currently or has previously acted as a Responsible/Relevant Person for another factoring organisation, the **Responsible/Relevant Person Record** should be completed:

- Click on the **Responsible/Relevant Person Record**
- Select **Add New**

- Complete the required information as stated below then click **Save** and **New** if you need to add another record.

**Responsible Person Other Registration History**

Property Factor: PF95

Responsible Person Type: Relevant Person

Date From: 01 Feb 2013

Date To: 28 Nov 2014

Is Current: ☐ (check to indicate Is Current)

Company Name: The Property Management Company

Address Line 1: Property Square

Address Line 2: 1 Property Factor Lane

Address Line 3:

Town: EDINBURGH

County:

Postcode: EH1 1HH

Buttons: Save, Back, New

- If additional fit and proper tests are required to be completed for additional relevant people, click on the **Fit and Proper Tests** heading and follow the steps from **page 17**.

You are here: [Home](#) >> [Registrations](#) >> [Registrations](#) >> [Fit and Proper Tests](#)

RESPONSIBLE/RELEVANT PERSON LIST		
Responsible/Relevant Person	Last Updated By	
Mr John Factor	Angela Cameron	<a href="#">Add New</a> <a href="#">Edit</a> <a href="#">View</a> <a href="#">Delete</a>

When all the fit and proper tests have been completed, change the status of the fit and proper test from “Draft” to “Pending Approval” (see **page 19 bullet point 11** for information on how to change the status) then follow the instructions from **page 21**.

## 2. STEP-BY-STEP INSTRUCTIONS TO REGISTER – STAGE 2

### E. Registration

Now you have completed all your fit and proper tests, you can complete the registration screen.

1. Click on the **Registration** tab.

RESPONSIBLE/RELEVANT PERSON LIST		
Responsible/Relevant Person	Last Updated By	Add New
Mr John Factor	Angela Cameron	<a href="#">Edit View Delete</a>

2. Check over all the information you have supplied on the registration screen is correct.

3. Check that the **Current Portfolio Size \*** 500 figure is the same and the number of individual properties factored.

Registration Status \*

Primary Contact Name \*

Primary Contact Email Address \*

Primary Contact Telephone \*

Company Name \*

Company Registration Number

Trading Type \*

Address Line 1 \*

Address Line 2

Address Line 3

Town \*

County

Postcode \*

Telephone \*

Fax

Email Address \*

Website Address

Current Portfolio Size \*

**Declaration**

I,  (full name)  (business address), the responsible person in terms of section 3(9) of the Property Factors (Scotland) Act 2011, hereby sign this application and certify that its contents are true and accurate.

(type in signature)

[Save](#) [Back](#) [New](#)

4. The Responsible Person should complete the **declaration** at the bottom of the registration screen.
5. Change the status from **Draft** to **Submitted for Approval** then click save [Save](#).
6. Once the status has been changed to **Submitted for Approval**, the registration screen will become un-editable.
7. If your organisation **does not** maintain any property and/or land. You have now **completed the registration process** and you **do not** need to complete any of the actions listed from **pages 22 to 34**.

## 2. STEP-BY-STEP INSTRUCTIONS TO REGISTER – STAGE 2

### Properties and Land Inputting Options

If you maintain property and/or land, you will need to add your property and land details to the register.


There are two options available for the inputting of property and land information:

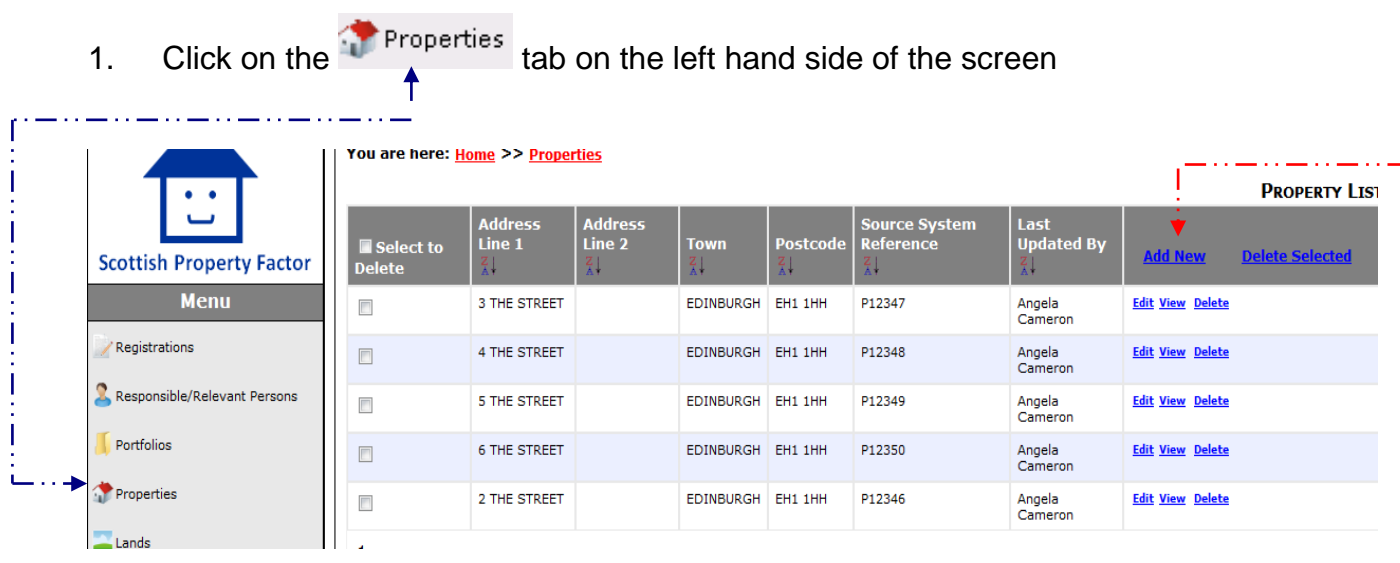
<p>Option 1 – Manual Input:</p> <p><b>(Suitable for organisations with a small property/land list)</b></p> <p>See <b>page 23</b> for this option</p>	<p>This option allows the user to enter data directly onto the register via data input screens. This may be the preferred option if you have a small number of records to enter onto the register or you are unable to automatically generate via the Bulk Upload file.</p>
<p>Option 2 – Bulk Upload:</p> <p><b>(Suitable for organisations with a large property/land list)</b></p> <p>See <b>page 26</b> then <b>29</b> for this option</p>	<p>This option allows the user to upload a previously prepared CSV data file directly onto the system. This may be the preferred option if you have a large number of records to enter onto the register.</p> <p>You may wish to consult with your own internal IT department and give them a copy of the file specification (linked below) before you create the bulk upload file.</p> <p><a href="http://www.gov.scot/Resource/0039/00398213.pdf">http://www.gov.scot/Resource/0039/00398213.pdf</a></p>

## 2. STEP-BY-STEP INSTRUCTIONS TO REGISTER – STAGE 2

### F. Properties – Manual Input

If you maintain a small number of properties, you may prefer to enter them in manually. If you maintain a large number of properties, you may wish to use the bulk upload option. For this option, go straight to **page 26** (Portfolios) then to **page 29** for bulk upload options.

1. Click on the  **Properties** tab on the left hand side of the screen



You are here: [Home](#) >> [Properties](#)

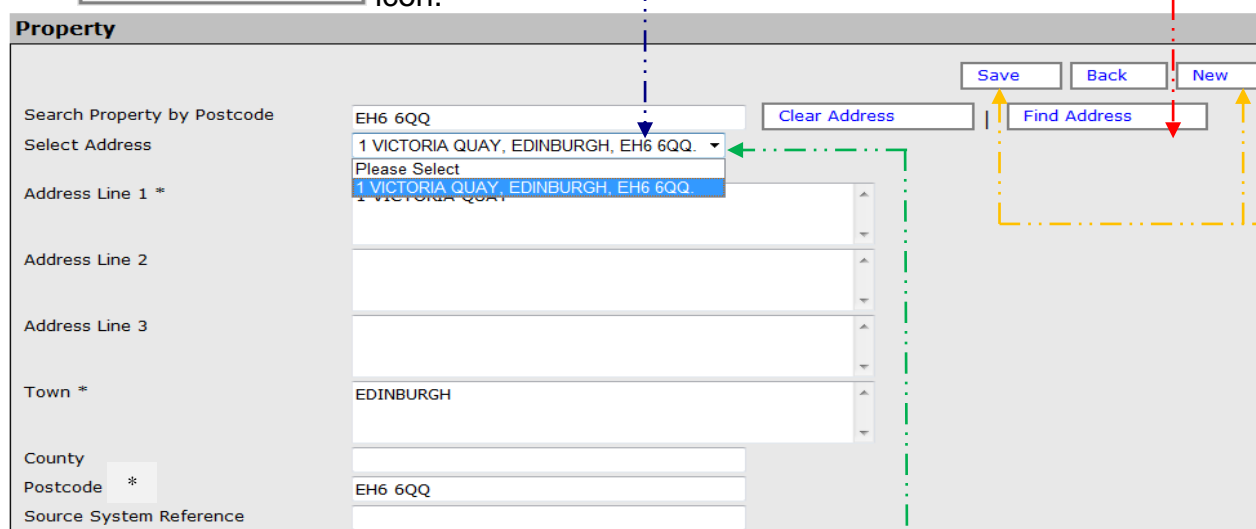
Select to Delete	Address Line 1	Address Line 2	Town	Postcode	Source System Reference	Last Updated By	Action
<input type="checkbox"/>	3 THE STREET		EDINBURGH	EH1 1HH	P12347	Angela Cameron	<a href="#">Edit View</a> <a href="#">Delete</a>
<input type="checkbox"/>	4 THE STREET		EDINBURGH	EH1 1HH	P12348	Angela Cameron	<a href="#">Edit View</a> <a href="#">Delete</a>
<input type="checkbox"/>	5 THE STREET		EDINBURGH	EH1 1HH	P12349	Angela Cameron	<a href="#">Edit View</a> <a href="#">Delete</a>
<input type="checkbox"/>	6 THE STREET		EDINBURGH	EH1 1HH	P12350	Angela Cameron	<a href="#">Edit View</a> <a href="#">Delete</a>
<input type="checkbox"/>	2 THE STREET		EDINBURGH	EH1 1HH	P12346	Angela Cameron	<a href="#">Edit View</a> <a href="#">Delete</a>

**PROPERTY LIST**

[Add New](#) [Delete Selected](#)

2. Click on the [Add New](#) icon on the right hand side of the screen.

3. If you have the postcode for the address, you can use this to find the address for you. Enter the post code into the **Search Property by Postcode** box then click on the [Find Address](#) icon.



**Property**

Search Property by Postcode: EH6 6QQ

Select Address: 1 VICTORIA QUAY, EDINBURGH, EH6 6QQ.

Address Line 1 \*: 1 VICTORIA QUAY, EDINBURGH, EH6 6QQ.

Address Line 2:

Address Line 3:

Town \*: EDINBURGH

County:

Postcode \*: EH6 6QQ

Source System Reference:

[Save](#) [Back](#) [New](#) [Find Address](#) [Clear Address](#)

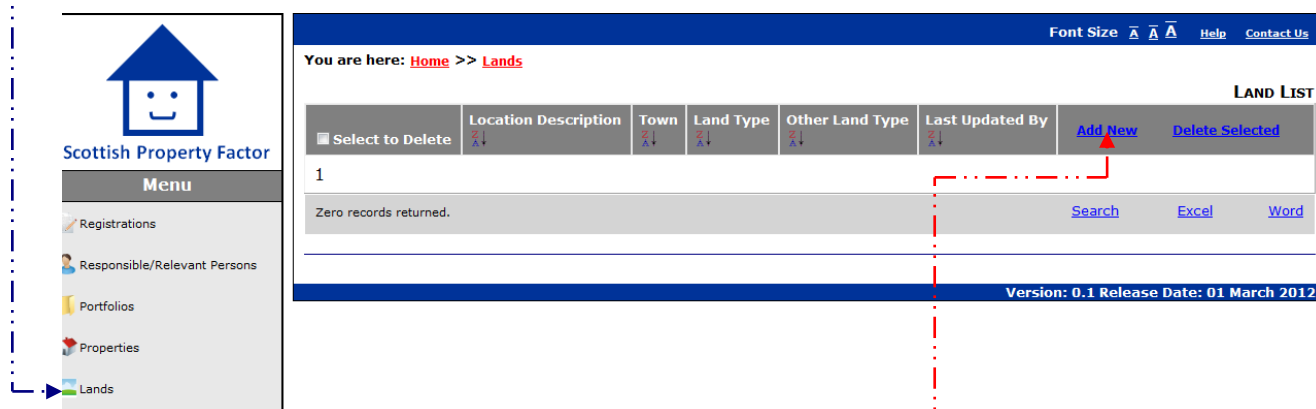
4. Select the correct address from the **drop down menu** to populate the address in the appropriate fields and click on [Save](#) then [New](#) to add another record.
5. Any field donated with a \* is a mandatory field and must be completed.
6. The Source System Reference is an optional field that your organisation can use to enter their own internal reference numbers. This may help you to cross reference the information held on the Property Factor Register with your own internal systems.

## 2. STEP-BY-STEP INSTRUCTIONS TO REGISTER – STAGE 2

### G. Land – Manual Input

If you maintain land, you will need to complete the land and property section. In the property section, you should provide the addresses of the customers who are responsible for maintaining the land that is factored.

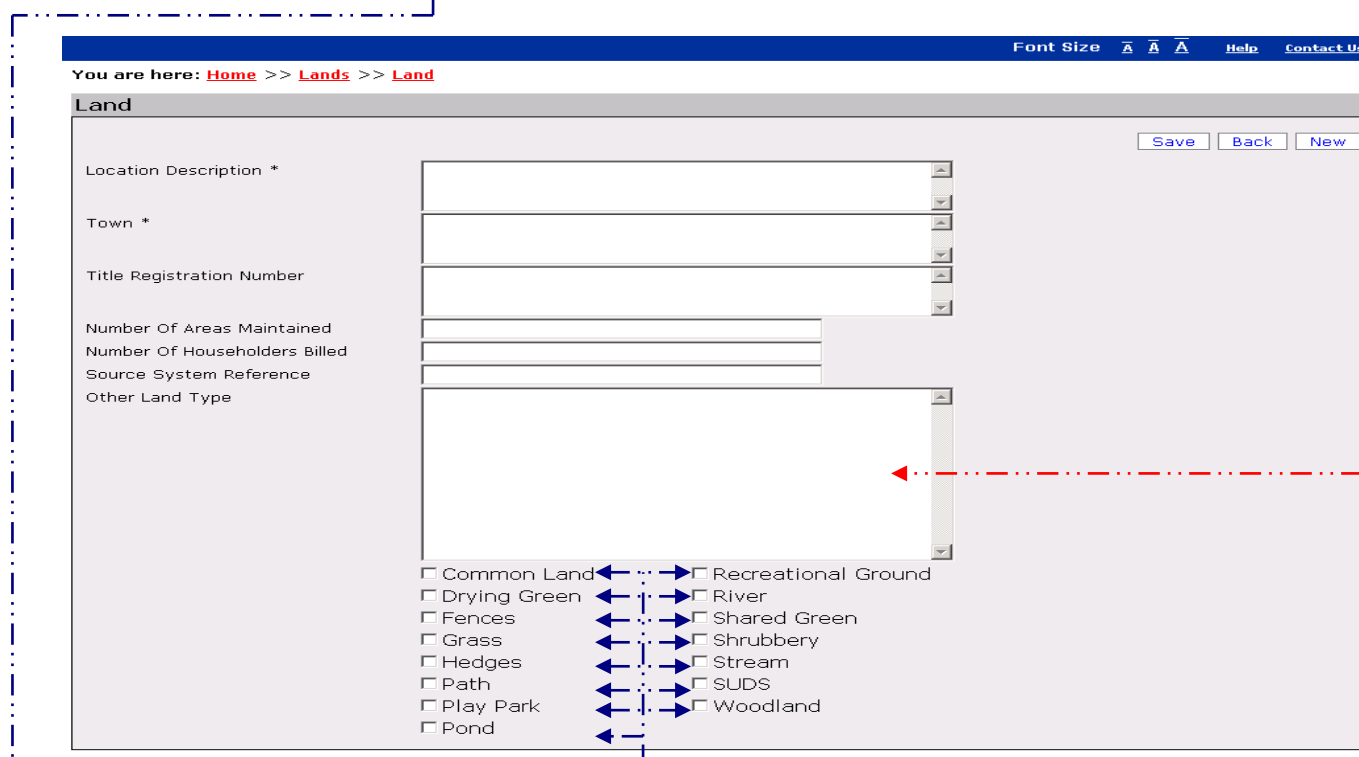
1. Click on the  Lands tab on the left hand side of the screen.



2. Click on the [Add New](#) field on the right hand side of the screen.

3. Fill in the required fields as specified in the table below:

**Please Note:** When recording information in relation to land, only **one** record is required per **development**. One development may include several pieces of land that are maintained by the property factor. These areas can be added onto one entry by selecting all the applicable **land descriptions** or by entering a description into the **Other Land Type** box.





## 2. STEP-BY-STEP INSTRUCTIONS TO REGISTER – STAGE 2


4. Any field that is denoted with a \* is mandatory and must be completed.
5. The Location Description is a free text cell for you to provide a description of the location of the areas maintained within a development. A maximum of **100 characters** can be used.
6. If you hold details of the Title Registration Number for the areas your organisation maintains, please enter the details in this field.
7. The Number of Areas Maintained field is the number of areas that are maintained per development.

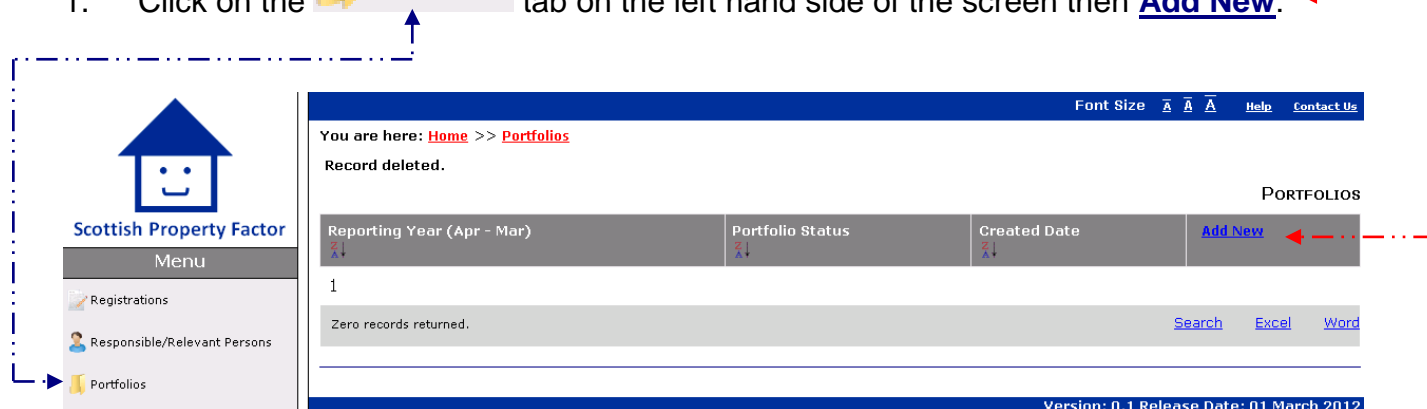
8. The Number of Householders Billed field is the number of people who receive a bill for the areas that are maintained per development.
9. The Source System Reference is an optional field that your organisation can use if you want to enter your own internal reference number. This may help you to cross reference the information held on the Property Factor Register with your own internal systems. You may also find it useful when you provide the Scottish Ministers with an annual update of the land you act as a property factor for on behalf of homeowners.
10. The Other Land Type field is a free text field for you to add a description of the areas maintained if you feel the land is not adequately described using the tick boxes on the land screen of the register.
11. When you have entered a record on the register, click on the **Save** icon and then the **New** icon every time you want to enter another record.
12. Once you have added all your property and land records (if applicable) you need to create a portfolio for the current financial year (see **page 26**).

## 2. STEP-BY-STEP INSTRUCTIONS TO REGISTER – STAGE 2

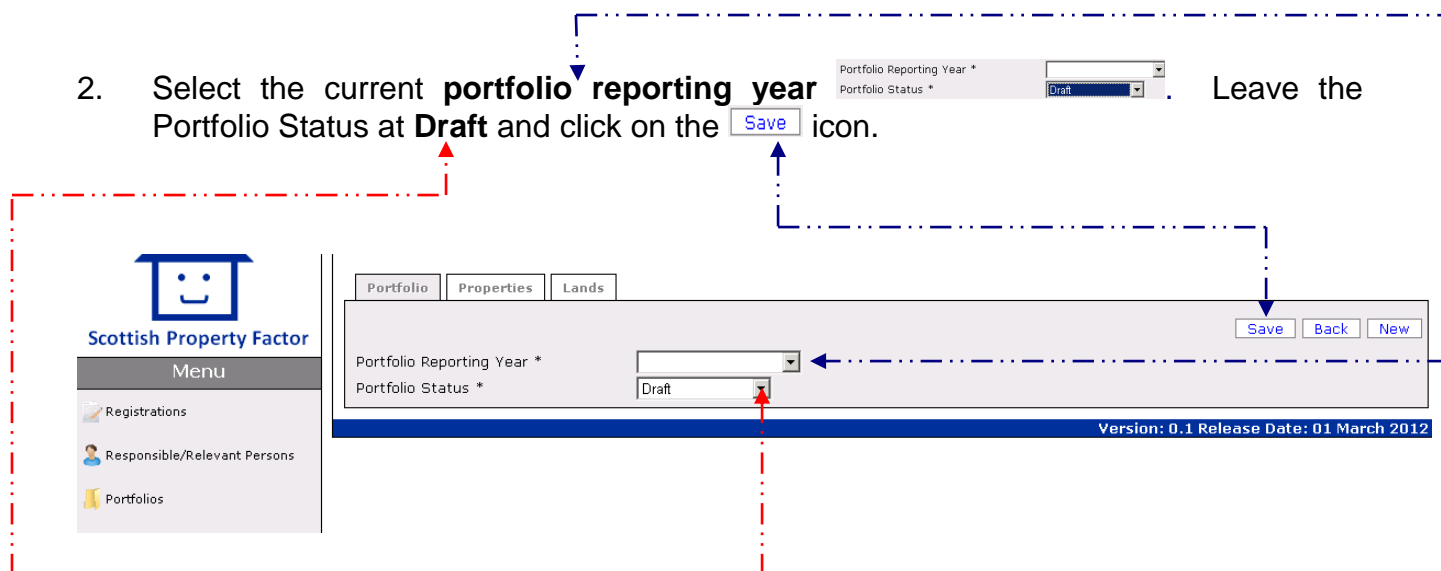
### H. Portfolios

You will need to create a portfolio for all the property and land records that your organisation maintains. A portfolio is a folder that contains all the factored property/land records linked to a specific financial year. You **do not** need to create a portfolio if your organisation **does not** currently maintain property/land.

1. Click on the  **Portfolios** tab on the left hand side of the screen then **Add New**:




2. Select the current **portfolio reporting year** and leave the Portfolio Status at **Draft** and click on the **Save** icon.

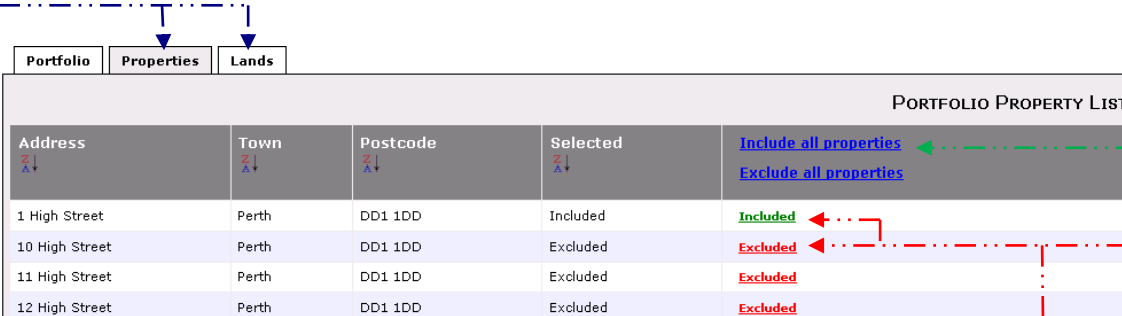


### PLEASE NOTE

If you are adding all your property and land records by bulk upload, go straight to **page 29**.

## 2. STEP-BY-STEP INSTRUCTIONS TO REGISTER – STAGE 2

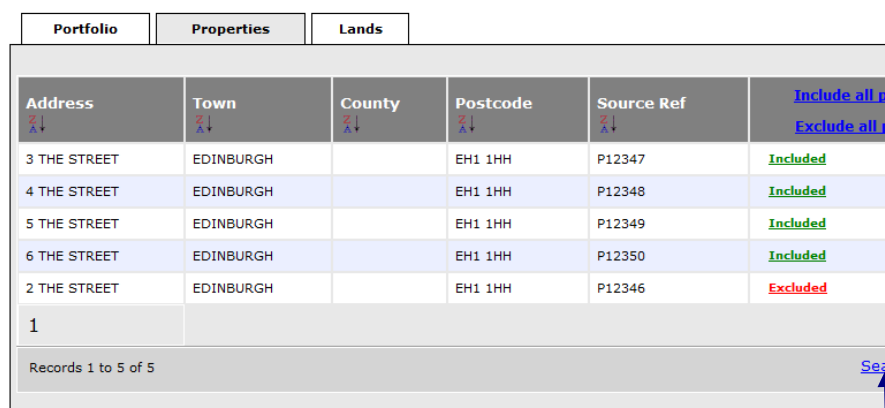
3. Click on the **properties** and/or **land** tab  at the top of the page. You will see that your properties/land records are **Excluded** from your portfolio. When properties are **Excluded**, they will not be visible on the public register on an approved registration. To include a property in a portfolio, you have two options:



PORTFOLIO PROPERTY LIST				
Address	Town	Postcode	Selected	<a href="#">Include all properties</a> <a href="#">Exclude all properties</a>
1 High Street	Perth	DD1 1DD	Included	Included
10 High Street	Perth	DD1 1DD	Excluded	Excluded
11 High Street	Perth	DD1 1DD	Excluded	Excluded
12 High Street	Perth	DD1 1DD	Excluded	Excluded

- To include an individual property/land record, click on the word **Excluded** at the side of each address and it will change to say that it is **Included** in the portfolio or;
- If you want to include all the property/land records in a portfolio, click on the **[Include all properties](#)** icon on the header bar and the properties/land will change from **Excluded** to **Included**

4. Once you have **Included** all the applicable property/land records to your portfolio, you can check to see if you have the correct number of properties in your portfolio by using the search facility in the portfolio section. To use the search facility, click on the **[Search](#)** icon at the bottom of the page.



PORTFOLIO PROPERTY LIST					
Address	Town	County	Postcode	Source Ref	<a href="#">Include all properties</a> <a href="#">Exclude all properties</a>
3 THE STREET	EDINBURGH		EH1 1HH	P12347	Included
4 THE STREET	EDINBURGH		EH1 1HH	P12348	Included
5 THE STREET	EDINBURGH		EH1 1HH	P12349	Included
6 THE STREET	EDINBURGH		EH1 1HH	P12350	Included
2 THE STREET	EDINBURGH		EH1 1HH	P12346	Excluded

Records 1 to 5 of 5

[Search](#) [Excel](#) [Word](#)

## 2. STEP-BY-STEP INSTRUCTIONS TO REGISTER – STAGE 2

5. A **search facility** box will appear at the top of the page as follows:

6. From the dropdown menu next to **Data Item** select the word **Selected** and click **Go**.

7. In the **Value** box type the word **Included** click on the word **Add** then **Apply Search**.

Address	Town	County	Postcode	Source Ref	
3 THE STREET	EDINBURGH		EH1 1HH	P12347	Included
4 THE STREET	EDINBURGH		EH1 1HH	P12348	Included
5 THE STREET	EDINBURGH		EH1 1HH	P12349	Included
6 THE STREET	EDINBURGH		EH1 1HH	P12350	Included

Records 1 to 4 of 4

8. At the bottom of the page, you will see the **number** of properties/land records that are **Included** in your portfolio. The figure at the bottom on the property section should be the same as the figure you have recorded on the registration screen called **Current Portfolio Size**. See **page 21, bullet point 3** for clarification.
9. Once you are happy that you have the correct amount of property/land records in your portfolio, you should change the status of your portfolio from **Draft** to **Pending Approval** and click the **Save** button.

## 2. STEP-BY-STEP INSTRUCTIONS TO REGISTER – STAGE 2

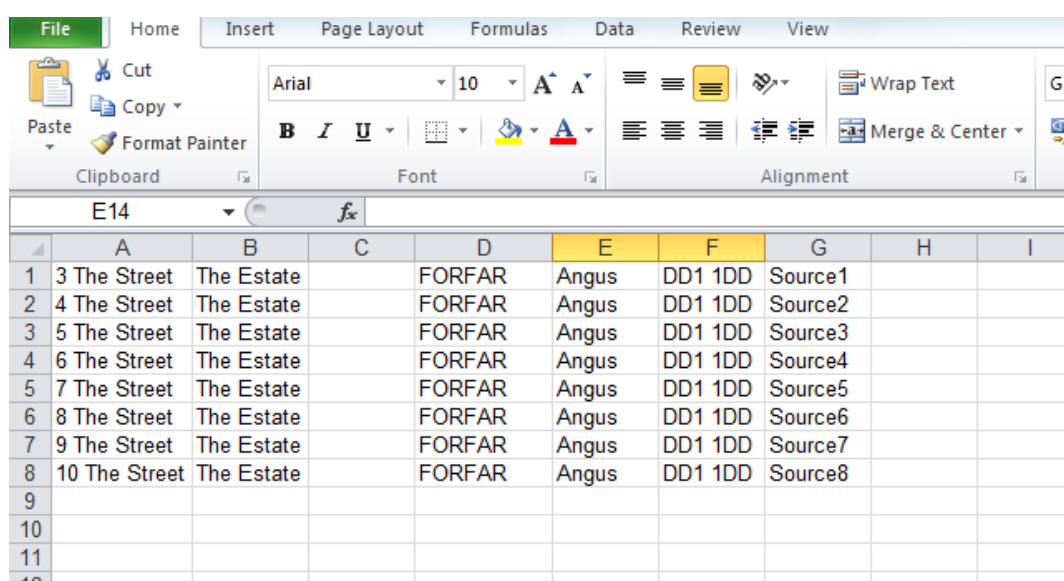
### I. Property and Land Bulk Upload

If a large number of properties are factored, you may find it easier to upload your properties from a file already created from your own internal IT systems.

1. You may for example store all your addresses on an Excel spreadsheet. If you do want to use this method to add your properties to the register, you must make sure the details are recorded in the correct columns or your file may not upload. The columns you should use for your file upload are as follows:

A	B	C	D	E	F	G
Address Line 1	Address Line 2	Address Line 3	Town	County	Postcode	Source System Reference

2. In order for the bulk upload file to work, you **must** enter information into the columns highlighted in red above (columns A, D and F) as they are mandatory fields. Listed below is an example of a correct file created in Excel.



	A	B	C	D	E	F	G	H	I
1	3 The Street	The Estate		FORFAR	Angus	DD1 1DD	Source1		
2	4 The Street	The Estate		FORFAR	Angus	DD1 1DD	Source2		
3	5 The Street	The Estate		FORFAR	Angus	DD1 1DD	Source3		
4	6 The Street	The Estate		FORFAR	Angus	DD1 1DD	Source4		
5	7 The Street	The Estate		FORFAR	Angus	DD1 1DD	Source5		
6	8 The Street	The Estate		FORFAR	Angus	DD1 1DD	Source6		
7	9 The Street	The Estate		FORFAR	Angus	DD1 1DD	Source7		
8	10 The Street	The Estate		FORFAR	Angus	DD1 1DD	Source8		
9									
10									
11									
12									

The **Source System Reference** (column G) can be used if a property factor uses internal reference number to identify each factored property. The reference number may help you to cross reference the information held on the Property Factor Register with your own internal systems. The information under this column will not be made public.

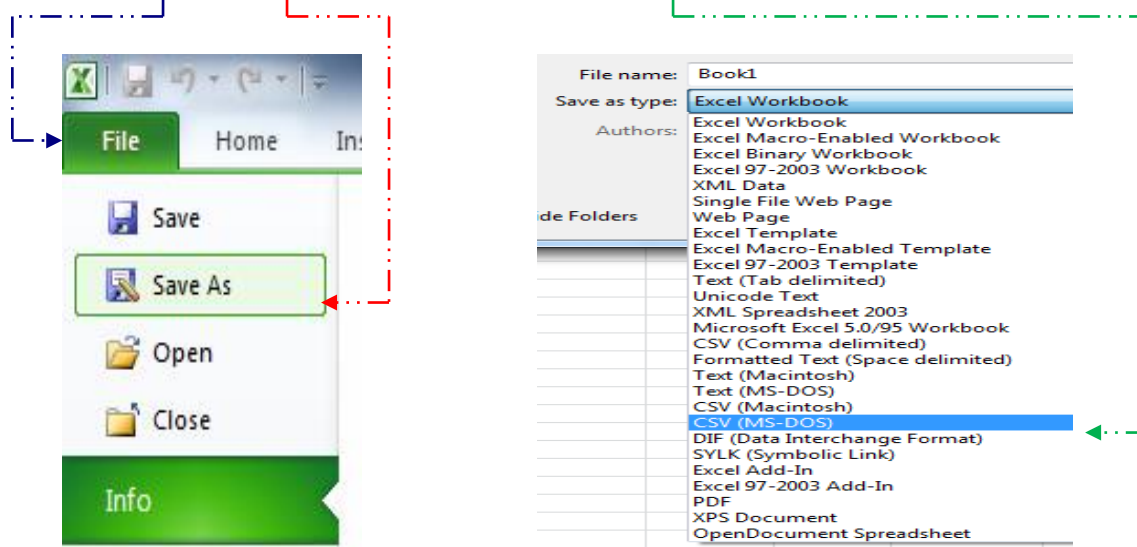
### Please Note

You can only upload 25,000 property/land records at the one time. If your property/land list is larger than this, you will need to create multiple CSV files with no more than 25,000 records on each file.

Remember to delete your header row as you do not want this to upload onto the register as an address on the register (e.g. Address Line 1, Address Line 2, Address Line 3, Town, County, Postcode, Source System Reference).

## 2. STEP-BY-STEP INSTRUCTIONS TO REGISTER – STAGE 2

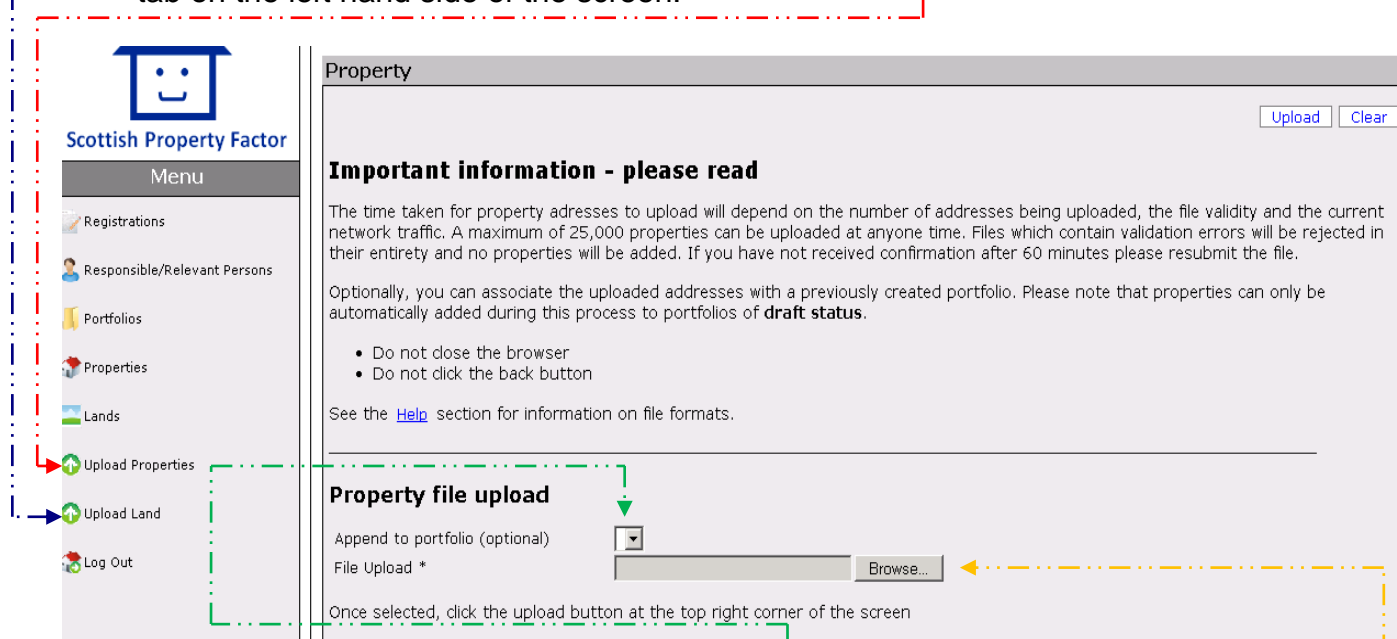
3. Once your file is created, it will need to be converted into a CSV file. To do this, click **File, Save As** and choose file type **CSV**.



4. A File Upload Specification is also available separately which sets out the required format for a bulk upload file. You may wish to consult with your own internal IT department and give them a copy of the file specification (linked below) before you create the bulk upload file.

<http://www.gov.scot/Resource/0039/00398213.pdf>

5. Once you have created your file, click on the **Upload Properties** or **Upload Land** tab on the left hand side of the screen.

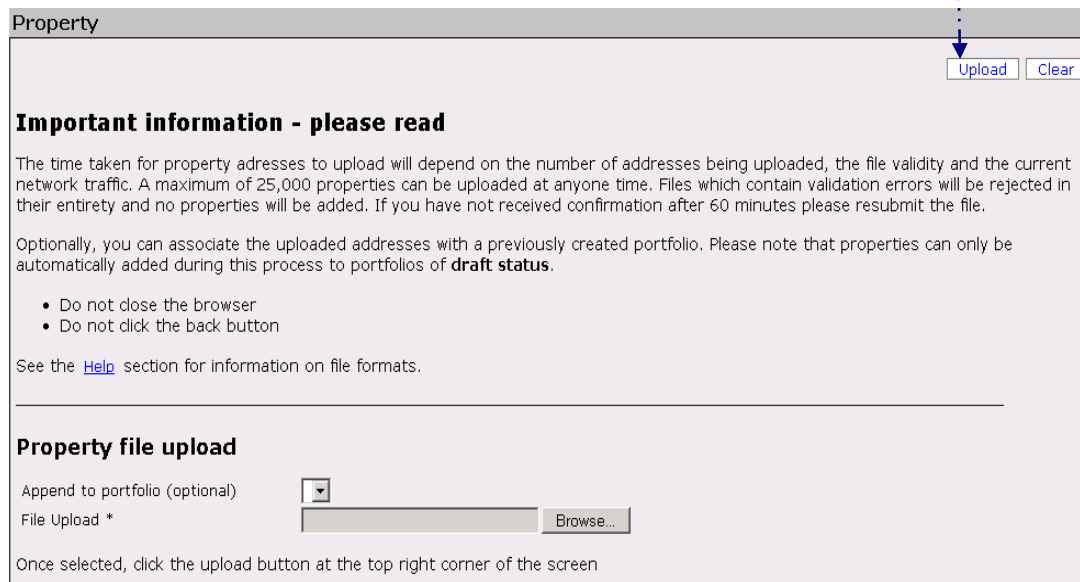


6. Click on dropdown box next to the **Append to portfolio** icon (see page 26 for information on how to create a portfolio) and select the current financial year. **Please Note:** if you do not append your property/land records to your current portfolio, your property/land records will be **Excluded** from your current portfolio and will not be visible on the public register when your portfolio is approved.

7. Upload the CSV file you have just created, then click on the **Browse...** icon above.

## 2. STEP-BY-STEP INSTRUCTIONS TO REGISTER – STAGE 2

8. Once you have appended the applicable file, click on the **Upload** icon.



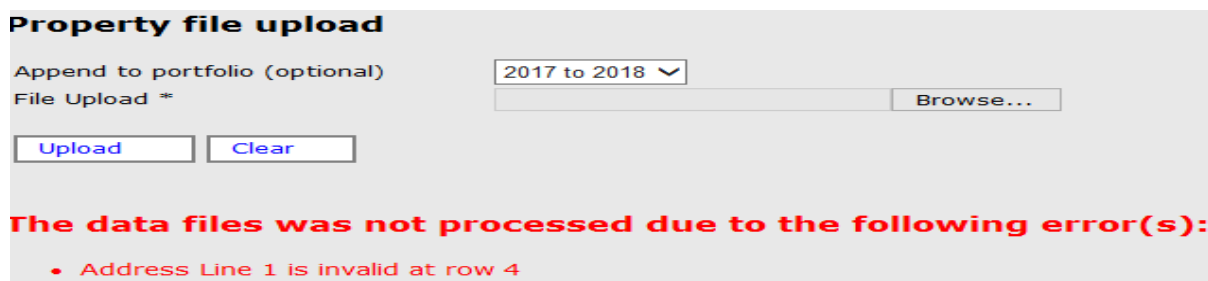
The screenshot shows a web form titled "Property". At the top right, there are two buttons: "Upload" and "Clear". A blue arrow points to the "Upload" button. Below the buttons is a section titled "Important information - please read" containing text about upload limits and a list of instructions: "Do not close the browser" and "Do not click the back button". Below this is a "Property file upload" section with a dropdown menu for "Append to portfolio (optional)", a text input field for "File Upload \*", and a "Browse..." button. At the bottom, it says "Once selected, click the upload button at the top right corner of the screen".

9. If the bulk upload is successful, the following message will appear on the screen:



The screenshot shows the "Property file upload" form with the "Upload" button highlighted. Below the form, a success message is displayed: "Your submission has been successfully received and has been queued for processing. Please note this can take up to 2 working days to show within your Property list. For further information please contact the Property Factor Registration Team, 0131 244 9965, propertyfactorregister@gov.scot ."

10. If the bulk upload was unsuccessful because the file did not contain the correct number of columns, the following message will appear on the screen along with a detailed description of the error(s):



The screenshot shows the "Property file upload" form with the "Upload" button highlighted. Below the form, an error message is displayed: "The data files was not processed due to the following error(s):". Below the error message, a list of errors is shown: "Address Line 1 is invalid at row 4".

## 2. STEP-BY-STEP INSTRUCTIONS TO REGISTER – STAGE 2

11. If the bulk upload was unsuccessful because the file contained duplicates, the register will provide a list of the first 50 duplicate records as follows:

**Property file upload**

Append to portfolio (optional) 2017 to 2018 ▾

File Upload \* Browse...

Upload Clear

**The data files was not processed due to the following error(s):**

- This data file contains 4 duplicate address:  
 3 The Street,The Estate,,FORFAR,Angus,DD1 1DD  
 14 The Street,The Estate,,FORFAR,Angus,DD1 1DD  
 21 The Street,The Estate,,FORFAR,Angus,DD1 1DD  
 25 The Street,The Estate,,FORFAR,Angus,DD1 1DD

12. The register stores a record of all the CSV file upload attempts to the register for up to 6 months (see information in red box below). This provides to user with a record of successful uploads as well as details of why a CSV file was not uploaded to the register. This information can be exported to Excel and Word.

**Property file upload**

Append to portfolio (optional) 2017 to 2018 ▾

File Upload \* Browse...

Upload Clear

**The data files was not processed due to the following error(s):**

- This data file contains 4 duplicate address:  
 3 The Street,The Estate,,FORFAR,Angus,DD1 1DD  
 14 The Street,The Estate,,FORFAR,Angus,DD1 1DD  
 21 The Street,The Estate,,FORFAR,Angus,DD1 1DD  
 25 The Street,The Estate,,FORFAR,Angus,DD1 1DD

**Uploads in last 6 months**

Portfolio	Uploaded By	Uploaded Date	Uploaded Time	Upload Status	Comments
2017 to 2018	firstname surname	13 Mar 2018	15:58:55	Processing Failed	This data file contains 4 duplicate address: 3 The Street,The Estate,,FORFAR,Angus,DD1 1DD 14 The Street,The Estate,,FORFAR,Angus,DD1 1DD 21 The Street,The Estate,,FORFAR,Angus,DD1 1DD 25 The Street,The Estate,,FORFAR,Angus,DD1 1DD
2017 to 2018	firstname surname	13 Mar 2018	15:52:13	Processing Failed	Address Line 1 is invalid at row 4
2017 to 2018	firstname surname	13 Mar 2018	15:27:21	Pending Processing	
2017 to 2018	firstname surname	13 Mar 2018	15:20:36	Pending Processing	
2017 to 2018	firstname surname	13 Mar 2018	14:50:47	Processing Failed	Address Line 1 is invalid at row 4

1 2 3 4 5

Records 1 to 5 of 22

[Search](#) [Excel](#) [Word](#)

13. Once you have added all the relevant property and has been added to the register, you will need to go into the portfolio section.



## 2. STEP-BY-STEP INSTRUCTIONS TO REGISTER – STAGE 2

14. Click on the **Portfolios** tab



You are here: [Home](#) >> [Portfolios](#)

Font Size [A](#) [A](#) [A](#) [Help](#) [Contact Us](#)

**PORTFOLIOS**

Reporting Year (Apr - Mar)	Portfolio Status	Created Date	<a href="#">Add New</a>
2012 to 2013	Draft	09 Oct 2012	<a href="#">Edit</a> <a href="#">View</a> <a href="#">Delete</a>

1

Records 1 to 1 of 1

[Search](#) [Excel](#) [Word](#)

Version: 1.0 Release Date: 27 August 2012

15. Click on the [Edit](#) icon for the portfolio you have created for the property/land records you just added to the register.
16. Click on the **properties** and **land** tab (if applicable):

**Portfolio** **Properties** **Lands**

**PORTFOLIO PROPERTY LIST**

Address	Town	County	Postcode	Source Ref	<a href="#">Include all properties</a> <a href="#">Exclude all properties</a>
3 THE STREET	EDINBURGH		EH1 1HH	P12347	Included
4 THE STREET	EDINBURGH		EH1 1HH	P12348	Included
5 THE STREET	EDINBURGH		EH1 1HH	P12349	Included
6 THE STREET	EDINBURGH		EH1 1HH	P12350	Included
2 THE STREET	EDINBURGH		EH1 1HH	P12346	Excluded

1

Records 1 to 5 of 5

[Search](#) [Excel](#) [Word](#)

17. Click on the [Search](#) icon at the bottom of the page.

A **search facility** box will appear at the top of the page as follows:

**Portfolio** **Properties** **Lands**

**Search** [Close Search](#)

Build Search

Data Item: [Property Id](#) [Go](#)

Condition: [Click 'Go' to load relevant columns](#)

Value:

[Add](#) ☒ And ☐ Or

Search Criteria

Filter Entries: No search criteria specified...

[Clear Last](#) [Clear All](#) [Apply Search](#)

18. From the dropdown menu next to **Data Item** select the word **Selected** and click [Go](#).

**Search**

Build Search

Data Item: [Selected](#) [Go](#)

Condition: [Click 'Go' to load relevant columns](#)

Value:

[Add](#) ☒ And ☐ Or

Search Criteria

Filter Entries: No search criteria specified...

[Clear Last](#) [Clear All](#) [Apply Search](#)

## 2. STEP-BY-STEP INSTRUCTIONS TO REGISTER – STAGE 2

In the **Value** box type the word **Included**

Build Search  
Data Item: Selected  
Condition: Contains  
Value: Included  
[Add](#) ☒ And ☐ Or

click on the word

[Add](#) then [Apply Search](#)

**Search** [Close Search](#)

Build Search  
Data Item: Selected [Go](#)  
Condition: Click 'Go' to load relevant column  
Value:   
[Add](#) ☒ And ☐ Or

Search Criteria  
Filter Entries: Selected Contains Included  
[Clear Last](#) [Clear All](#) [Apply Search](#)

**PORTFOLIO PROPERTY LIST**

Address	Town	County	Postcode	Source Ref	<a href="#">Include all properties</a> <a href="#">Exclude all properties</a>
3 THE STREET	EDINBURGH		EH1 1HH	P12347	Included
4 THE STREET	EDINBURGH		EH1 1HH	P12348	Included
5 THE STREET	EDINBURGH		EH1 1HH	P12349	Included
6 THE STREET	EDINBURGH		EH1 1HH	P12350	Included
1					

Records 1 to 4 of 4 [Search](#) [Search Off](#) [Excel](#) [Word](#)

19. At the bottom of the page, you will see the **number** of properties/land records that are **Included** in your portfolio. The figure at the bottom on the property section should be the same as the figure you have recorded on the registration screen called **Current Portfolio Size**. See **page 21 bullet point 3** for clarification.

**Search** [Close Search](#)

Build Search  
Data Item: Selected [Go](#)  
Condition: Click 'Go' to load relevant column  
Value:   
[Add](#) ☒ And ☐ Or

Search Criteria  
Filter Entries: Selected Contains Included  
[Clear Last](#) [Clear All](#) [Apply Search](#)

**PORTFOLIO PROPERTY LIST**

Address	Town	County	Postcode	Source Ref	<a href="#">Include all properties</a> <a href="#">Exclude all properties</a>
3 THE STREET	EDINBURGH		EH1 1HH	P12347	Included
4 THE STREET	EDINBURGH		EH1 1HH	P12348	Included
5 THE STREET	EDINBURGH		EH1 1HH	P12349	Included
6 THE STREET	EDINBURGH		EH1 1HH	P12350	Included
1					

Records 1 to 4 of 4 [Search](#) [Search Off](#) [Excel](#) [Word](#)

20. Once you are happy that you have the correct amount of property/land records in your portfolio, you should change the status of your portfolio from **Draft** to **Pending Approval** and click the [Save](#) button.

21.

**Portfolio** **Properties** **Lands**

Portfolio Reporting Year \*: Apr 2012 to Mar 2013  
Portfolio Status \*: Draft

[Save](#) [Back](#) [New](#)

[Draft](#)  
[Pending approval](#)

Version: 0.1 Release Date: 01 March 2012

22. Once the portfolio has been changed to pending approval, you have completed the online application process. An invoice in relation to registration fees will be issued to the primary contact person listed on the register.

## 2. STEP-BY-STEP INSTRUCTIONS TO REGISTER – STAGE 2

### J. Registration Process Complete

You can use the following checklist to make sure that you have completed all the actions required for your organisation's registration application.

	Yes	No
1. Have the responsible/relevant people been added to the register? (page 16)		
2. Has the responsible person and any relevant person(s) carried out a fit and proper test? (page 17)		
3. Have the fit and proper tests been set to "Pending Approval"? (page 19)		
4. Has the responsible person completed the declaration at the bottom of the registration screen? (page 21)		
5. Have you added property and/or land to the register if you currently or intend to factor? (page 22)		
6. If you have added properties to the register, does the figure under the heading "Current Portfolio Size" of the registration screen (page 21) match the number of properties included in your portfolio (page 28 and 34)		
7. Have you changed the status of your registration to "Submitted for Approval"? (page 21)		
8. Have you changed the status of your portfolio to "Pending Approval"? (page 34)		
9. Have you paid your registration fees? (page 11)		

If you have completed all the actions listed on the checklist above, you have now completed the registration process.

#### **Approved Applications**

If your registration is **approved**, the primary contact person listed on your application will receive an approval email. The listed responsible person will receive an approval letter by recorded delivery with your organisation's Property Factor Reference number and details of the obligations placed on a property factor under the Act. Your registration details will also be listed on the public register.

#### **Incomplete Applications**

If you have not undertaken all of the required actions in relation to completing your application, a member of the Registration Team will contact you to inform you of any further action required. Please note that submitting an incomplete application may delay the process of your application being determined.

#### **Declined Applications**

If your registration application is **not successful**, a member of the Registration Team will contact you to inform you of any further action required and/or actions to be taken by Scottish Ministers.

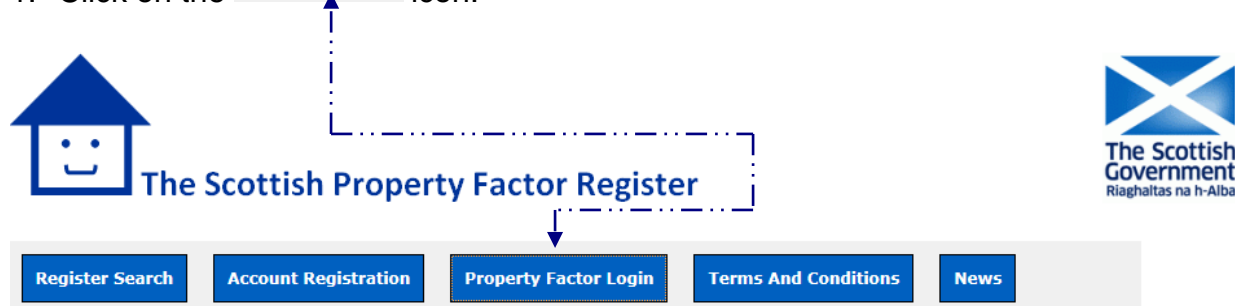
## 2. STEP-BY-STEP INSTRUCTIONS TO REGISTER – STAGE 2

### K. Resetting Passwords

#### Instructions if you have forgotten your password

If you have forgotten your password, you have the option to reset it.

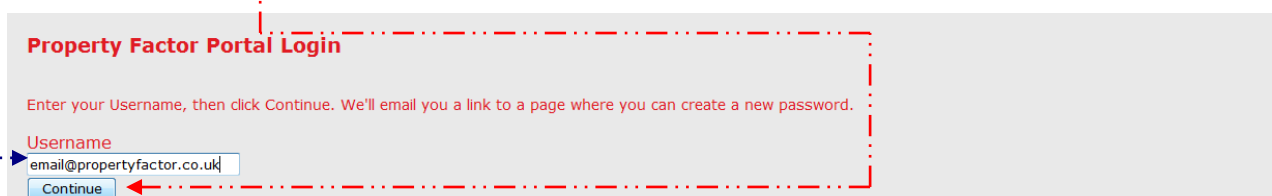
1. Click on the **Property Factor Login** icon.



2. Then click on the [Forgotten your Password?](#) icon.



3. Enter the **username** for the register (this is the email address of your primary contact) and press the **Continue** icon.



4. An email will be sent to the primary contact with details on how to reset the password.

#### **Property Factor Portal Login**

If your details are correct, an email will appear in your inbox shortly detailing password reset instructions.


#### **Please Note**

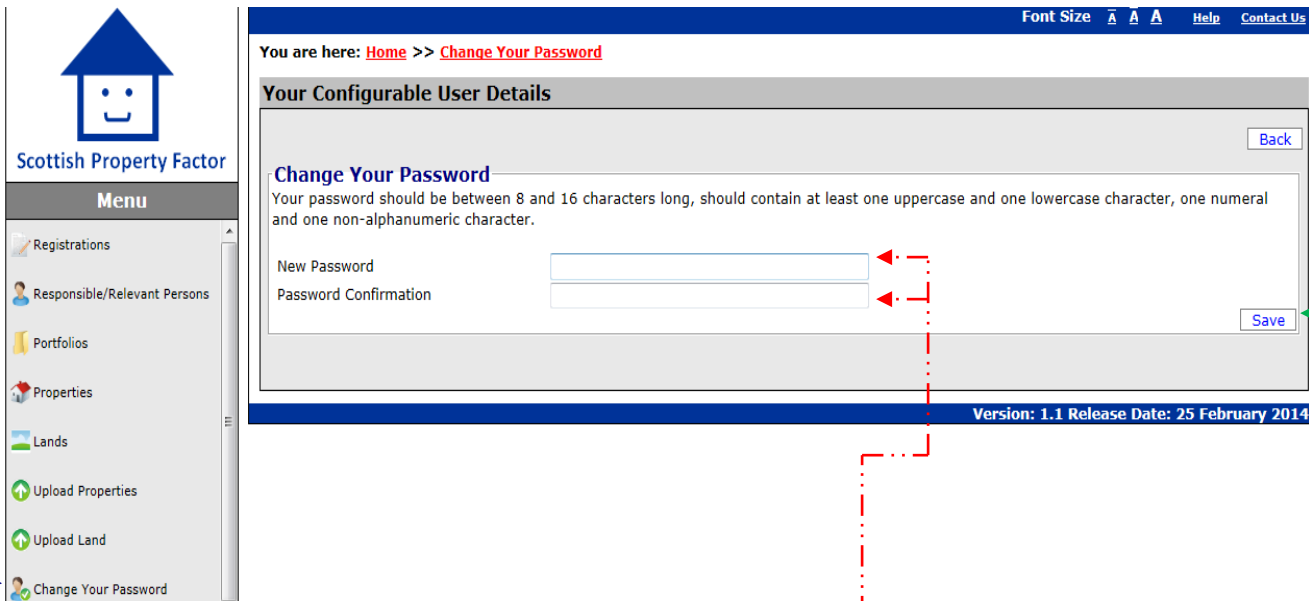
If you enter an incorrect password more than 3 times, your account will be locked and you will be unable to reset your password. If this is the case, you will need to contact a member of the Registration Team using the details below:

Email: [propertyfactorregister@gov.scot](mailto:propertyfactorregister@gov.scot)  
Telephone: 0131 244 9965


## 2. STEP-BY-STEP INSTRUCTIONS TO REGISTER – STAGE 2

Instructions if you want to change an unforbidden password

5. When you are in the register, click on the  **Change Your Password** icon.



The screenshot displays the 'Scottish Property Factor' web application. On the left is a 'Menu' with options: Registrations, Responsible/Relevant Persons, Portfolios, Properties, Lands, Upload Properties, Upload Land, and Change Your Password. The 'Change Your Password' option is highlighted with a blue arrow. The main content area is titled 'Your Configurable User Details' and contains a 'Change Your Password' form. The form includes instructions: 'Your password should be between 8 and 16 characters long, should contain at least one uppercase and one lowercase character, one numeral and one non-alphanumeric character.' It has two input fields: 'New Password' and 'Password Confirmation'. Red dashed arrows point from the text in step 6 to these two fields. A 'Save' button is at the bottom right of the form, with a green dashed arrow pointing to it from the text in step 6. A 'Back' button is at the top right of the form. The footer of the application shows 'Version: 1.1 Release Date: 25 February 2014'.

6. Enter and confirm your password in the **New Password** and **Password Confirmation** boxes and click on the  **Save** icon.

## DEFINITION OF A PROPERTY FACTOR

The *Property Factors (Scotland) Act 2011* provides the following definition of a property factor under section 2:

### 2 Meaning of “property factor”

(1) In this Act “property factor” means-

- a) a person who, in the course of that person’s business, manages the common part of land owned by two or more other persons and used to any extent for residential purposes,
- b) a local authority or housing association which manages the common parts of land used to any extent for residential purposes and owned-
  - (i) by two or more other persons, or
  - (ii) by the local authority or housing association and one or more other person,
- c) a person who, in the course of that person’s business, manages or maintains land which is available for use by the owners of any two or more adjoining or neighbouring residential properties (but only where the owners of those properties are required by the terms of the title deeds relating to the properties to pay for the cost of the management or maintenance of that land), and
- d) a local authority or housing association which manages or maintains land which is available for use by-
  - (i) the owners of any two or more adjoining or neighbouring residential properties, or
  - (ii) the local authority or housing association and the owners of any one or more such properties,

but only where the owners of those properties are required by the terms of the title deeds relating to the properties to pay for the cost of the management or maintenance of that land.

## PROPERTY AND LAND – MIXED TENURE BLOCKS OR DEVELOPMENTS

### Information for Local Authorities and Registered Social Landlords (RSLs)

Where you are the property factor for a block/development and you own some of the properties but not all and therefore you share responsibility for the common parts with other owner(s), please include all the properties in that block/development in the list you supply. You should include the addresses of those properties which are owned by private owners and those that are owned by you for rental to your tenants. There is no need to include blocks/developments where you are the sole owner – i.e. which are entirely social rented tenure.

If open land is also managed in this situation you may also need to include the development in your land list as well as listing the individual properties.

If you are in doubt about what to include, refer to the definition of what situations determine who is considered a “property factor” in terms of sections 2(1)(b) and (d) of the Property Factors (Scotland) Act 2011.

In both sections 2(1)(b) and (d) the concept of shared responsibility or ownership of common parts is important. This is why if the local authority or RSL is the sole owner and no other party has obligations to contribute to the management or maintenance of the buildings or land – i.e. entirely social rented tenure – then the properties or land are not being factored by you in terms of the Act and therefore you do not include them in your portfolio.

If you continue to be in doubt about which properties and land should be included in your portfolio, please contact the registration team using the details below:

Email: [propertyfactorregister@gov.scot](mailto:propertyfactorregister@gov.scot)  
Telephone: 0131 244 9965