



Internal Guide: BOX & Referencing Updates for the Renters' Rights Act

This guide provides a comprehensive overview of the planned updates to the BOX platform and referencing processes in response to the Renters' Rights Act. These changes are designed to ensure compliance with new legal requirements, particularly around tenancy types, workflows, referencing, and related features in England, with considerations for Wales, Scotland, and Northern Ireland where applicable. The updates focus on introducing Assured Periodic Tenancies (APTs) as the default for most residential lettings, while supporting other tenancy types and adapting processes to minimise restrictions for non-RRA-affected tenancies.

All changes up to and including Change 7 are targeted for completion before May 1st, 2026. However, **exact release dates will be confirmed and circulated internally once finalised**. If any changes need to be moved to a later release, you will be updated. This guide is for internal use only and should not be shared with external agents or users.

All changes listed below are subject to change as we undergo regular reviews with Woodstock in relation to further information provided by the Government.

You are able to preview changes here - <https://vlt-chomp-25640776.figma.site/>

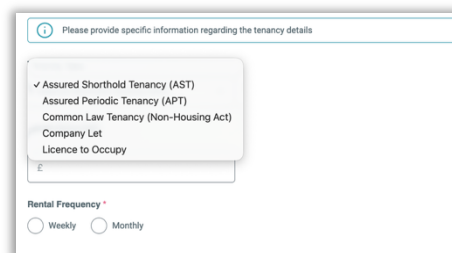
Contents

1. Capturing Legal Tenancy Type
2. Tenancy Workflows Based on Tenancy Type
3. Applying New Agreement Templates
4. Referencing Updates
5. Specification of APT Life Cycle
6. Update Renewal Process for Non-APT Tenancies
7. Issuing Section 13 Notices - Part 1
8. Issuing Section 13 Notices - Part 2
9. Managing Pet Requests
10. Issuing Section 13 Notices - Part 3

1 | Capturing Legal Tenancy Type

This update introduces enhanced data capture for tenancy types to align with RRA requirements, ensuring accurate classification and compliance warnings.

- **New Tenancy Type Options:** Agents can now capture the legal tenancy type for both new and existing tenancies, including Assured Periodic Tenancy (APT), License to Occupy, Common Law Tenancy, Company Lets, and specific tenancy types for Wales, Scotland, and Northern Ireland.
- **Form Adjustments for APTs:** When selecting APT, fields related to tenancy term and rent in advance are hidden from the Create Tenancy form to prevent non-compliant entries.
- **Presumption for England Properties:** All tenancies for properties in England will be presumed as Assured Shorthold Tenancies (ASTs) until May 1st, 2026, unless the agent selects a different type beforehand.
- **Auto-Conversion on May 1st:** Any tenancies still marked as ASTs on May 1st will automatically convert to APTs, with agents able to amend them afterward.



1.1 HMO Warning

Introduces fields for HMO (House in Multiple Occupation) and student let status to enable warnings if the tenancy may not qualify for eviction under Section 8 Ground 4 (student eviction).

- **Ground 4 Warning Criteria:** The warning appears only if:
 - o all tenants are full time students
 - o the property is a HMO, and
 - o tenancy start date is more than 6 months in the future

The warning is displayed at Create Tenancy Steps 3 and Step 5, but agents can still proceed.

⚠ Important – Student HMO Possession Rules

This tenancy starts more than 6 months in the future and is classed as a student HMO.

Under the Renters' Rights Act, you will not be able to rely on Ground 4A under a Section 8 notice, which means you may not be able to guarantee vacant possession at the end of the academic year.

You may wish to review the proposed start date before proceeding.

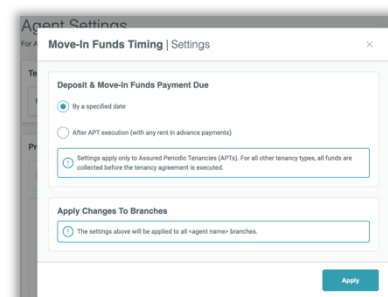
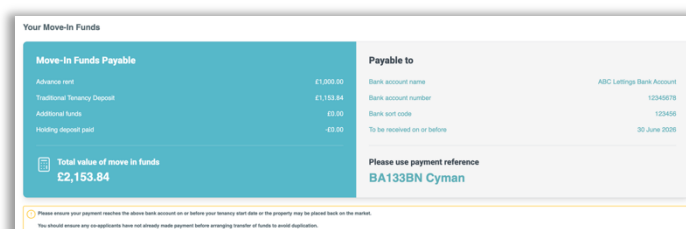
Note: All features in Change 1 (Capturing tenancy type and HMO warning) will not be accessible to agents until Change 2 (Tenancy Workflows Based on Tenancy Type) is completed.

API Updates: Includes updates to the API for capturing tenancy types.

2. Tenancy Workflows Based on Tenancy Type

Workflows across Steps 1-8 are being updated to support APTs and other tenancy types, enforcing RRA limits where applicable while relaxing them for non-affected tenancies.

- **APT-Specific Adaptations:** For Assured Periodic Tenancies (APT), advance rent values are strictly limited in line with RRA requirements, preventing agents from requesting excessive upfront payments. Tenancy end date fields and associated rent schedules are removed entirely from the workflow, reflecting the periodic (open-ended) nature of these tenancies.
- **Agent Preferences Move-In Funds:** At the agent level, there is now a configurable setting that determines whether security deposits are collected before the agreement is executed (as in the current process) or after execution (paid at the same time as advance rent), with this choice clearly communicated to the tenant at Step 4.
- **APT Move in Funds Tenant Confirmation:** At Step 4 of the tenancy process, tenants receive clear notifications outlining the permitted payment timelines for move-in funds, accompanied by a mandatory tick box they must check to confirm they have read and understood that certain funds

- (such as advance rent) should not be paid until after the Tenancy Agreement has been signed.
- **Tenancy Agreement Updates:** The system automatically hides any tenancy agreement clauses that are no longer relevant or permitted under APT rules, such as break clauses and renewal options, ensuring only compliant content is presented.
- **Non-APT Adaptations:** Workflows for other tenancy types are updated to avoid unnecessary RRA restrictions, allowing full flexibility within their legal limits.
- **Insurance Restrictions:** Access to insurance products is limited for incompatible tenancy types (e.g., common law non-Housing Act tenancies).

API Updates: Applying these changes to the Reapit app.

3. Applying New Agreement Templates

This change focuses on tenancy agreement template management to ensure agents use compliant documents based on tenancy type, reducing errors.

- **Setup for Compliance Service Users:** New APT agreement templates will be set up for all agents using the Tenancy Compliance service (pending final versions from Woodstock).
- **Template Filters:** New filters ensure only matching templates are presented at Step 5 based on tenancy type.
- **Disabling Old Templates:** Customers using TLH templates will automatically have their templates switched on May 1st. Those who are not using TLH templated but have provided the new template before April 1st will also have their templates updated in BOX ready for May 1st. Agents that miss the deadline will have them updated, but we cannot guarantee the template will be in BOX ready to use before May 1st.

Note: These filters minimise human error and promote compliance.

API Updates: Applying this logic to the Reapit app.

4. Referencing Updates

Referencing processes are being refined to incorporate RRA implications, with updates to affordability checks and reporting.

- **Guarantor Affordability:** Updated to a minimum of 3x annual rent. No change for agents already at or above this threshold.
- **Fixed-Term Contract Questions:** New questions for applicants with fixed-term income to confirm the renewal status of their contract:
 - o If renewal confirmed: Accept (subject to other criteria).
 - o If no/unknown but >4 months remaining: Accept with Guarantor (subject to other criteria).
 - o If no/unknown and <4 months remaining: Decline (subject to other criteria).
- **Report Updates:** Final reports will include contract renewal details if the applicant is on a fixed-term income, tenancy type, and display the term as "periodic" for APTs.
- **Visibility:** Tenancy type is also displayed on applicant details pages in BOX for full visibility to ensure the referencing team are clear when speaking to the agents and tenants, on when rent in advanced can be discussed as a solution.

5. Specification of APT Life Cycle

Defines the ongoing management of APTs post-creation, including conversions.

- **Auto-Conversion:** All ASTs will automatically convert to APTs on May 1st, 2026.
- **Renewal Suppression:** Renewal workflows are suppressed for APTs to align with periodic nature.
- **Property Passport Handling:** Blocks renewals via Property Passport, redirecting to Traditional Referencing, DIY Referencing (if enabled). If agent is not enabled for Traditional Referencing or DIY Referencing, they are able to renew on NRR as a fallback however agents should ensure agents are switched on for an alternative referencing solution as part of the transition.

6. Update Renewal Process for Non-APT Tenancies

Enhances renewal workflows for non-APT tenancies to maintain consistency and compliance.

- **Workflow Updates:** Renewals now match Step 5 adaptations, allowing tenancy-type-specific changes. Upon completion, the original tenancy is automatically archived.
- **Dashboard Improvements:** Agent dashboard clearly labels new tenancies vs. renewals, with consistent step naming.

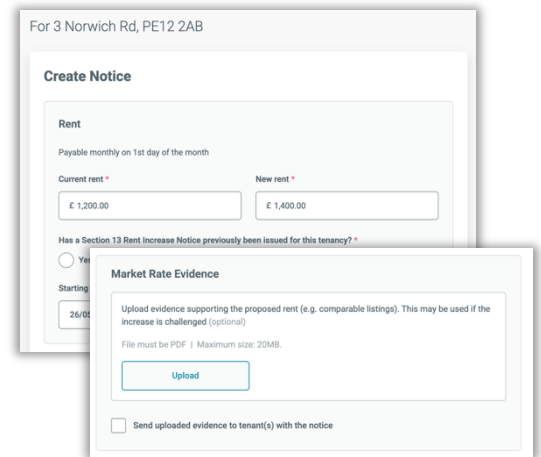
API Updates: Ability to initiate renewals from Reapit.

7. Issuing Section 13 Notices - Part 1

Introduces basic functionality for issuing Section 13 notices for rent increases on APTs.

- **Issuing Section 13 Notices:** Agents have the functionality to issue Section 13 notices through BOX on APT tenancies.
- **Evidence Handling:** Agents are able to upload fair market value evidence for storage in BOX and send it to tenants with the notice. This is optional on each notice.
- **Follow-Up Letter:** Ability to issue a letter if a smaller rent increase is agreed upon post-Section 13. This is required to be agreed by both the letting agent and the tenant, with both required to sign.

API Updates: Issuing Section 13 from the Reapit app.



For 3 Norwich Rd, PE12 2AB

Create Notice

Rent

Payable monthly on 1st day of the month

Current rent * £1,200.00 New rent * £1,400.00

Has a Section 13 Rent Increase Notice previously been issued for this tenancy? *

☐ Yes ☐ No

Starting 26/09

Market Rate Evidence

Upload evidence supporting the proposed rent (e.g. comparable listings). This may be used if the increase is challenged (optional)

File must be PDF | Maximum size: 20MB.

☐ Send uploaded evidence to tenant(s) with the notice

8. Issuing Section 13 Notices - Part 2

Expands Section 13 management with tracking and automation features.

- **Management Area:** New section in BOX for managing tenancies eligible for annual rent increases (every 12 months).
- **Insurance Auto-Updates:** Policies automatically update to reflect rent increases.

API Updates: Applying auto-update process to the Reapit app. Release date: TBD.

9. Managing Pet Requests

Introduces a structured process for handling pet requests under RRA guidelines.

- **Tenant Submission:** Tenants can submit formal pet requests via BOX.
- **Agent Management:** New area for agents to handle requests, including deadline reminders.

API Updates: Responding to pet requests via Reapit. Release date: TBD.

10. Issuing Section 13 Notices - Part 3

Final adaptations for Section 13, including regional variations and notifications.

- **Wales-Specific Changes:** Adaptations to Section 13 processes for Wales.
- **Guarantor Notifications:** Ability to send informal rent increase letters to guarantors or issue new guarantor agreements.

API Updates: Applying these changes to Reapit. Release date: TBD.