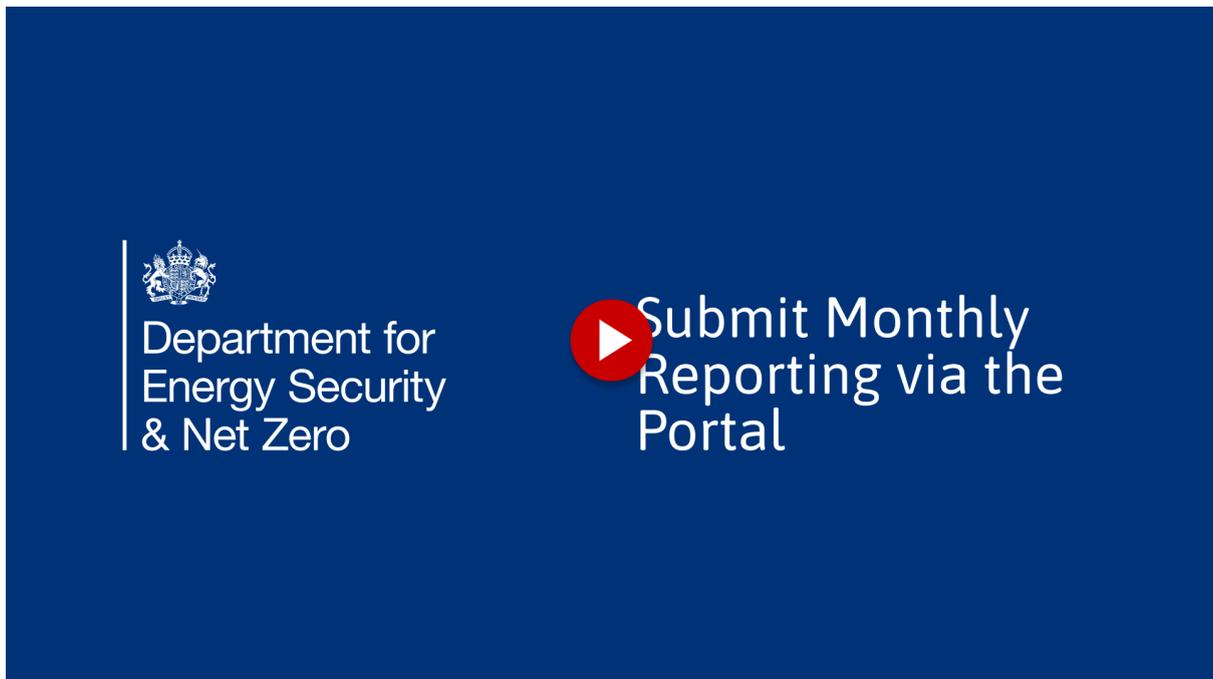


# [WH007: Submit Monthly Reporting via the Portal](#)

[Click here to watch](#)



In this guide, I will walk you through the steps to Submit Monthly Reporting via the DEZNS Grant Recipient Portal.

## **1. Click "Create New Monthly Update"**

After Clicking on Monthly Reporting, then Monthly Update, you have two options. Either edit an existing report or create one from scratch. I will create a new one first by clicking on "Create New Monthly Update".

### SHF3-Allerdale Borough Council-2024

January monthly update is due in 29 days, on the 15 January 2025

**Click "Create New Monthly Update"**

#### Open Updates

Date of Update	Baseline Version	
4 December 2024	ALD-Award Baseline V2	<a href="#">edit update</a>
		<a href="#">Create New Monthly Update</a>

▼ Closed Updates Reopen report update

4 of 4 items - 0 items selected

Update Reference	Baseline Version	Reporting Period Start	Reporting Period End	Status

## 2. Create New Monthly Update

fill in details including RAG updates, phase confidence, and written narratives around the plan for next month.

### Monthly Update: November 2024 SHF3-Allerdale Borough Council-2024 ALD-Award Baseline V3 Update Due: 15 January 2025

All fields must be completed to save the form. If you have incomplete figures at the time of creating the first draft then enter 0 or dummy text/dates for that data and return to finish your update later. Updates cannot be edited after the due date

Start of Reporting Period  
1 Nov 2024

End of Reporting Period  
30 Nov 2024

▼ Summary Details

\* Date of Update  
17 Dec 2024

\* Homes Approached

\* Phase RAG Rating

Red  
 Amber  
 Green

Reasons not receiving installations (use CTRL + Click to select more than one option)

- Cost of measures too high
- Tenant refusal/access to home
- Enabling works (either too costly or take too long)
- Home already at EPC C
- Home has measures already

▼ Narrative

You should use this area to explain any variations in your monthly report between the actuals and the forecast. For example, you should note reasons for any difference in the Key Performance Indicator figures. This will help when assessing the status of this project.

\* Plan for Next Month

\* Progress Update

## 3. Click "Go to Actuals"

Click "Go to Actuals"

\* Date of Update  
17 Dec 2024

\* Homes Approached  
454

\* Phase RAG Rating  
 Red  
 Amber  
 Green

Reasons not receiving installations (use CTRL + Click to select more than one option)

- Cost of measures too high
- Tenant refusal/access to home
- Enabling works (either too costly or take too long)
- Home already at EPC C
- Home has measures already

▼ Narrative

You should use this area to explain any variations in your monthly report between the actuals and the forecast. For example, you should note reasons for any difference in the Key Performance Indicator figures. This will help when assessing the status of this project.

\* Plan for Next Month  
double check list

\* Progress Update  
good progress

Lessons Learned/Other Information (optional)

**Click "Go to Actuals"**

[Go to Actuals](#)

#### 4. Select an Active Baseline

Click on an an active baseline

Department for Energy Security & Net Zero

**Warm Homes: Grant Recipient Portal**

Welcome, Jane Doe  
Allerdale Borough Council

Home Baselines Monthly Reporting Properties & Measures Payments Fraud & Risks Technical Support Logout

SHF3-Allerdale Borough Council-2024

**Click here**

Monthly Update: Choose Phase Baseline  
SHF3-Allerdale Borough Council-2024  
Monthly Update due: 15 January 2025

\* Choose from Active Baselines

ALD-Phase-1-Baseline V5

[Go to Actuals](#)

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#### 5. Fill in Actuals

Fill in numbers that reflect what was actually achieved for the month.

\*Actuals Start Date: 1 Nov 2024

\*Actuals End Date: 30 Nov 2024

▼ Finance Actuals

Total Grant Received  
**£24,856**

\*Grant Capital Spend:

\*Grant A&A Spend:

\*Co-funding:

\*Combined A&A spend:

\*Co-funding Capital Spend:

\*Combined Capital Spend:

▼ Homes Actuals

Total homes to be treated (from Baseline)  
**70,000**

\*Homes Validated (KPI):

\*Homes identified suitable for retrofit:

\*No. of homes ready for installs to start:

\*Homes started installations (KPI):

\*Homes with all installations completed:

\*Home Completed (KPI):

## 6. Actuals Validation Rule

There is a validation on this page, whereby the total number of homes to be treated must not be exceeded by the homes KPI values below it.

**Monthly Update: Actuals**  
SHF3-Allerdale Borough Council-2024  
**ALD-Phase-1-Baseline V5**  
Update Due: 15 January 2025

All fields must be completed to save the form. If you have incomplete figures at the time of creating the first draft then enter 0 for that data and return to finish your update later. Updates cannot be edited after the due date

November 2024

\*Actuals Start Date: 1 Nov 2024

\*Actuals End Date: 30 Nov 2024

▼ Finance Actuals

Total Grant Received  
**£24,856**

\*Grant Capital Spend:

\*Grant A&A Spend:

\*Co-funding total spend:

\*Combined A&A spend:

\*Co-funding Capital Spend:

\*Combined Capital Spend:

▼ Homes Actuals

Total homes to be treated (from Baseline)  
**70,000**

\*Homes Validated (KPI):

**ERROR: THE TOTAL NUMBER OF HOMES TO BE TREATED HAS BEEN EXCEEDED BY THE HOMES KPI VALUES - PLEASE ADJUST THE NUMBERS TO PROCEED**

## 7. Forecast Page

You will then be shown the forecast data that exists for this month, which was filled out by a Delivery Partner slash PSO.



## SHF3-Allerdale Borough Council-2024

January monthly update is due in 29 days, on the 15 January 2025

### Open Updates

Date of Update	Baseline Version	
4 December 2024	ALD-Award Baseline V2	<a href="#">edit update</a>
17 December 2024	ALD-Award Baseline V3	<a href="#">edit update</a>

[Create New Monthly Update](#)

4 of 4 items - 0 items selected

Reopen report update

Update Reference	Baseline Version	Reporting Period Start	Reporting Period End	Status
<input type="radio"/> PUP-00003	ALD-Phase-1-Baseline V4	1 Sept 2024	30 Sept 2024	Closed
<input type="radio"/> PUP-00001	ALD-Phase-1-Baseline V4	1 Oct 2024	31 Oct 2024	Closed
<input type="radio"/> PUP-00012	ALD-Award Baseline V2	1 Dec 2024	31 Dec 2024	Closed
<input type="radio"/> PUP-00016	ALD-Award Baseline V2	31 Dec 2024	1 Dec 2024	Closed

No Update Record Selected

## 10. Click "edit update"

and can edit it up until the 10th working day, whereby it will automatically become closed, and move to the "Closed Updates" table shown on screen. You will be taken back through the same screens as before.

## SHF3-Allerdale Borough Council-2024

January monthly update is due in 29 days, on the 15 January 2025

Click "edit update"

### Open Updates

Date of Update	Baseline Version	
4 December 2024	ALD-Award Baseline V2	<a href="#">edit update</a>
17 December 2024	ALD-Award Baseline V3	<a href="#">edit update</a>

[Create New Monthly Update](#)

4 of 4 items - 0 items selected

Reopen report update

Update Reference	Baseline Version	Reporting Period Start	Reporting Period End	Status
<input type="radio"/> PUP-00003	ALD-Phase-1-Baseline V4	1 Sept 2024	30 Sept 2024	Closed
<input type="radio"/> PUP-00001	ALD-Phase-1-Baseline V4	1 Oct 2024	31 Oct 2024	Closed
<input type="radio"/> PUP-00012	ALD-Award Baseline V2	1 Dec 2024	31 Dec 2024	Closed
<input type="radio"/> PUP-00016	ALD-Award Baseline V2	31 Dec 2024	1 Dec 2024	Closed

No Update Record Selected

This guide covered the steps required to Submit Monthly Reporting via the DEZNS Portal.

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