# 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 DEZNZ 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".

Department fo Energy Securi & Net Zero	or <b>Wa</b>	irm Homes:	Grant R	ecipien	t Portal	Alle	Welcome, Jane I rdale Borough Cou	Doe Incil	
Home Baselines	5 Monthly Reporting V	Properties & Measures 🗸	Payments	Fraud & Risks	Technical Support	Logout			
SHE3-Aller	dale Borough	Council-2024							
January mon	itiliy update is due in	29 uays, on the 15 J	anuarv zuzo						
		Click "	Crea	ate	New	Mc	onth	ly	Upo
Open Update	25	Click "	Crea	ate	New	Mc	onth	ly	Upo
Open Update	25 Baseline Version	Click "	Crea	ate	New	Mc	onth	ly	Upo
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# 2. Create New Monthly Update

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

rt of Reporting Period	End of Reporting Period
Nov 2024	iii 30 Nov 2024
<sup>7</sup> Summary Details	
Date of Update	* Phase RAG Rating
17 Dec 2024	Red
Homes Approached	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

# 3. Click "Go to Actuals"

Click "Go to Actuals"

*Date of Update	* Phase RAG Rating
17 Dec 2024 💼	○ Red
*Homes Approached 0	O Amber
454	Green
	Reasons not receiving installations (use CTRL + Click to select more than one option)
	lenant refusal/access to nome
	Enabling works (either too costly or take too long)
	Home already at EPC C
	Home has measures already
<ul> <li>Narrative</li> </ul>	
Plan for Next Month	s and the intercess. For example, you should note reasons for any dimeterice in the Key
double check list	Click "Go to Actuals"
*Progress Update 🕚	
good progress	٩
Lessons Learned/Other Information (optional)	
Lessons Learned/Other Information (optional)	
Lessons Learned/Other Information (optional)	<b>? (6</b> )
Lessons Learned/Other Information (optional) 0	© ©
Lessons Learned/Other Information (optional)	© 🕞
Lessons Learned/Other Information (optional) 💿	© © Go to Actuals

## 4. Select an Active Baseline

Click on an an active baseline



## 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 to 15000	*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 0	
*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 Up	date: Actuals
SHF3-Allerdale Bo	rough Council-2024
ALD-Phase-	1-Baseline V5
Update Due: 1	L5 January 2025
All fields must be completed to save the form. If you have incomplete figures at the time of Updates cannot be edited after the due date	creating the first draft then enter 0 for that data and return to finish your update later.
November 2024	
*Actuals Start Date	* Actuals End Date
1 Nov 2024 🗰	30 Nov 2024 🗰
Format: 31 Dec 2024	
✓ Finance Actuals	
Total Grant Received	
£24,856	
*Grant Capital Spend 👩	" Grant A&A Spend 👩
£2,344	£4,555
*Co-funding total spend 0	*Combined A&A spend 0
£345	£345
*Co-funding Capital Spend 0	
£44	
*Combined Capital Spend	
£345	*
✓ Homes Actuals	
Total homes to be treated (from Baseline)	* Homes Validated (KPI)
70,000	2,000
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.

	, , ,		
S	HF3-Allerdale Bor	ough Council-2024	
	ALD-Phase-1	-Baseline V5	
	Update Due: 1	i January 2025	
All fields must be completed to save the form. If you have incomp	plete figures at the time of c	eating the first draft then enter 0 for that data and return to finish your upd	late later.
opuares cannot be careed area the due date			
* Forecast Start Date		* Forecast End Date	
1 Feb 2025	ä	28 Feb 2025	<b></b>
<ul> <li>Finance Forecast</li> </ul>			
• Grant Capital Spend 🕚		* Grant A&A Spend 🕕	
Co-funding total spend		* Combined A&A spend 0	
*Co-funding Capital Spend 0		* Combined Capital Spend	

## 8. Navigate back to Monthly Updates

Navigate back to Monthly Updates

The series with the porting of the series of the porting period is not a serie of the porting period is not a series of the porting period is not	Department for Energy Security & Net Zero	Warm Homes: Gra	nt Recipient Portal	Weicome, Jane Doe Allerdale Borough Council	
<section-header></section-header>	Home Baselines	Anthly Reporting	rents Fraud & Risks Technical Support	Logout	
Branchiz Update: November 2024 Grande Borough Council-2024 De Varier St January 2023     Starter Grande De Varier House Internet Int	SHF3-Allerdal	e Borough Council-2024			
Al 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       End of Reporting Period         1 Nov 2024       Image: Complex Com		Monthly Update: SHF3-Allerdale Bor ALD-Award Update Due: 1	November 2024 ough Council-2024 Baseline V3 5 January 2025		
start of Reporting Period 1 Nov 2024 • Summary Details • Date of Update 17 Dec 2024 • Homes Approached • Navigate Navigate Tenant refusal/access to home	All fields must be completed your update later. Updates c	I to save the form. If you have incomplete figures at the time of o annot be edited after the due date	reating the first draft then enter 0 or dummy text/dat	tes for that data and return to finish	
1 Nov 2024       • Summary Details       • Date of Update       17 Dec 2024       • Homes Approached •       • Homes Approached •       • Navigate       • Green       • Green       • Monthly• Updat       • Tenant refusal/access to home	Start of Reporting Period		End of Reporting Period		
<ul> <li>Summary Details</li> <li>Date of Update</li> <li>T7 Dec 2024</li> <li>Homes Approached          <ul> <li>Navigate</li> <li>Greent Constant on the part of the second of the secon</li></ul></li></ul>	1 Nov 2024		30 Nov 2024	<b>ii</b>	
*Phase RAG Rating 17 Dec 2024 *Homes Approached  Navigate Navigate Data to Da	✓ Summary Details				
Homes Approached  Navigate back to Monthly Updat	*Date of Update		* Phase RAG Rating		
Navigate back to Monthly Updat	17 Dec 2024	<u> </u>	Red		
Tenant refusal/access to home	*Homes Approached 🜘	Navigate	back to M	onthly U	pdate
			Tenant refusal/access to home		

# 9. Edit Monthly Updates Report

You will see the Monthly update you just created in the "Open Updates" section,

January monthly update is	s due in 29 days, on the	2 15 January 2025			
Open Updates					
Date of Update Baseline Version	1				
4 December 2024 ALD-Award Basel	line V2 edit update 🛛 👝				
17 December 2024 ALD-Award Baseli	line V3 edit update				
17 December 2024 ALD-Award Basel	line V3 edit update	Create New Monthly Update			
17 December 2024 ALD-Award Baseli	line V3 edit update	Create New Monthly Update			
17 December 2024 ALD-Award Basel	line V3 edit update	Create New Monthly Update			
17 December 2024 ALD-Award Basel	ine V3 edit update	Create New Monthly Update		Pa	
17 December 2024 ALD-Award Basel	ine V3 edit update	Create New Monthly Update		Re	open report update
17 December 2024 ALD-Award Basel Closed Updates 4 of 4 items - 0 items selected Update Reference	Baseline Version	Create New Monthly Update	Reporting Period End	Re	open report update
17 December 2024 ALD-Award Basel Closed Updates 4 of 4 items - 0 items selected Update Reference ~ 0 PUP-00003	Baseline Version ~ ALD-Phase-1-Baseline V4	Create New Monthly Update Reporting Period Start 1 Sept 2024	Reporting Period End 30 Sept 2024	Re Status Closed	open report update
17 December 2024 ALD-Award Basel Closed Updates 4 of 4 items • 0 items selected Update Reference ~ 9 PUP-00003 9 PUP-00001	Baseline Version ~ ALD-Phase-1-Baseline V4 ALD-Phase-1-Baseline V4	Create New Monthly Update Reporting Period Start 1 Sept 2024 1 Oct 2024	Reporting Period End 30 Sept 2024 31 Oct 2024	Re Status Closed Closed	open report update
17 December 2024     ALD-Award Basel        Closed Updates       4 of 4 items • 0 items selected     Update Reference        PUP-00003        PUP-00001        PUP-00012	Baseline Version ~ ALD-Phase-1-Baseline V4 ALD-Phase-1-Baseline V4 ALD-Award Baseline V2	Create New Monthly Update Reporting Period Start 1 Sept 2024 1 Oct 2024 1 Dec 2024	Reporting Period End           30 Sept 2024           31 Oct 2024           31 Dec 2024	Re Status Closed Closed Closed	open report update

## 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.

and any monthly aparter	is due in 29 days, or	n the	15 January 2025	Click "	editı	upc
Open Updates						
ate of Update Baseline Version	n					
4 December 2024 ALD-Award Base	line V2 edit update					
17 December 2024 ALD-Award Base	eline V: edit update	←				
			Create New Monthly Update	]		
✓ Closed Updates	_		Create New Monthly Update	]	Reop	pen report update
<ul> <li>Closed Updates</li> <li>4 of 4 items • 0 items selected</li> </ul>	_		Create New Monthly Update		Reop	en report update
Closed Updates     4 of 4 items • 0 items selected     Update Reference     v	P Baseline Version	×	Create New Monthly Update	Reporting Period End	Reop	ben report update
Closed Updates     dof 4 items • 0 items selected     Update Reference     PUP-00003	Baseline Version ALD-Phase-1-Baseline V4	~	Create New Monthly Update	Reporting Period End 30 Sept 2024	Reop Status Closed	ben report update
Closed Updates     dof 4 items • 0 items selected     Update Reference     PUP-00003     PUP-00001	Baseline Version     ALD-Phase-1-Baseline V4     ALD-Phase-1-Baseline V4	~	Create New Monthly Update Create New Monthly Update Reporting Period Start 1 Sept 2024 1 Oct 2024	Reporting Period End 30 Sept 2024 31 Oct 2024	Reop Status Closed Closed	pen report update
Closed Updates     dof 4 items • 0 items selected     Update Reference     PUP-00003     PUP-00001     PUP-00012	Baseline Version       ALD-Phase-1-Baseline V4       ALD-Phase-1-Baseline V4       ALD-Award Baseline V2	~	Create New Monthly Update Create New Monthly Update Reporting Period Start 1 Sept 2024 1 Oct 2024 1 Dec 2024	Reporting Period End           30 Sept 2024           31 Oct 2024           31 Dec 2024	Reop Status Closed Closed Closed	een report update

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

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