WH003: System Overview - Grant Recipient

[Click here to watch](#)

Welcome to the system overview for Grant Recipients of the DESNZ Warm Homes Reporting App. This guide will demonstrate the functionalities designed to help local councils and housing associations manage their Funding Award.

1. Disclaimer

All the screenshots in this user guide are taken from the DESNZ training environment. Since the system is still in development, there may be some differences to the screens you see in the live environment, and the data used is purely for demonstration purposes.
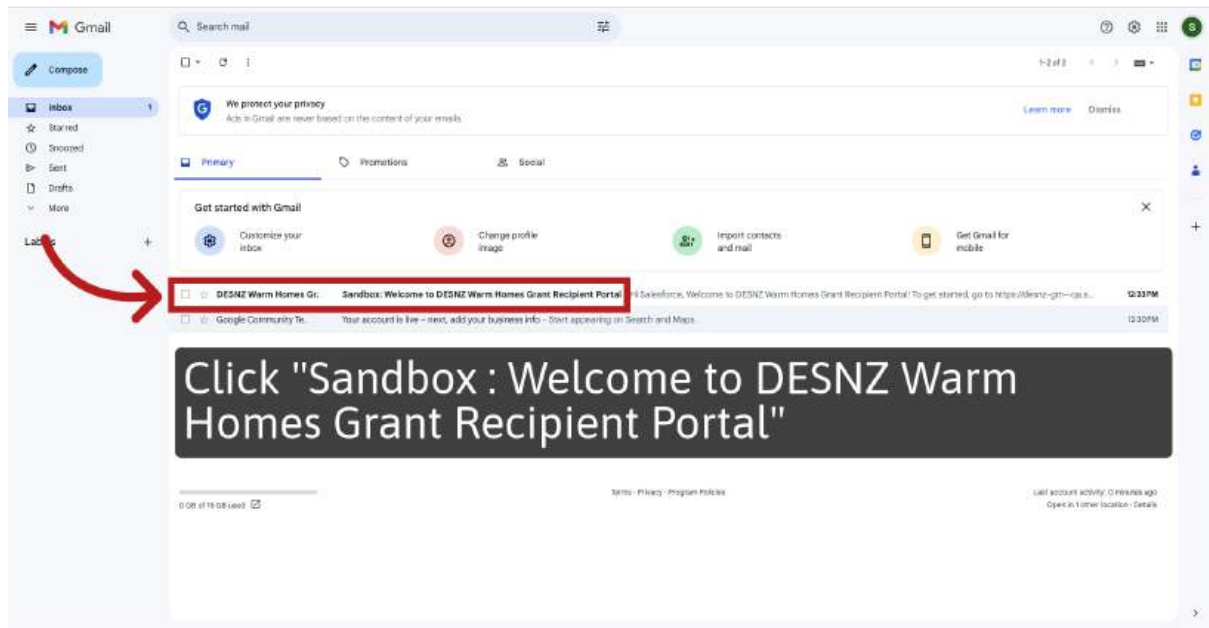
## 2. Logging into & Navigating the Grant Recipient Portal

3. Click "Sandbox : Welcome to DESNZ Warm Homes Grant Recipient Portal"

To begin, you should have received an email from " DESNZ Warm Homes Grant Recipient Portal", prompting you to select the link. This is where you will create a password for your portal account.
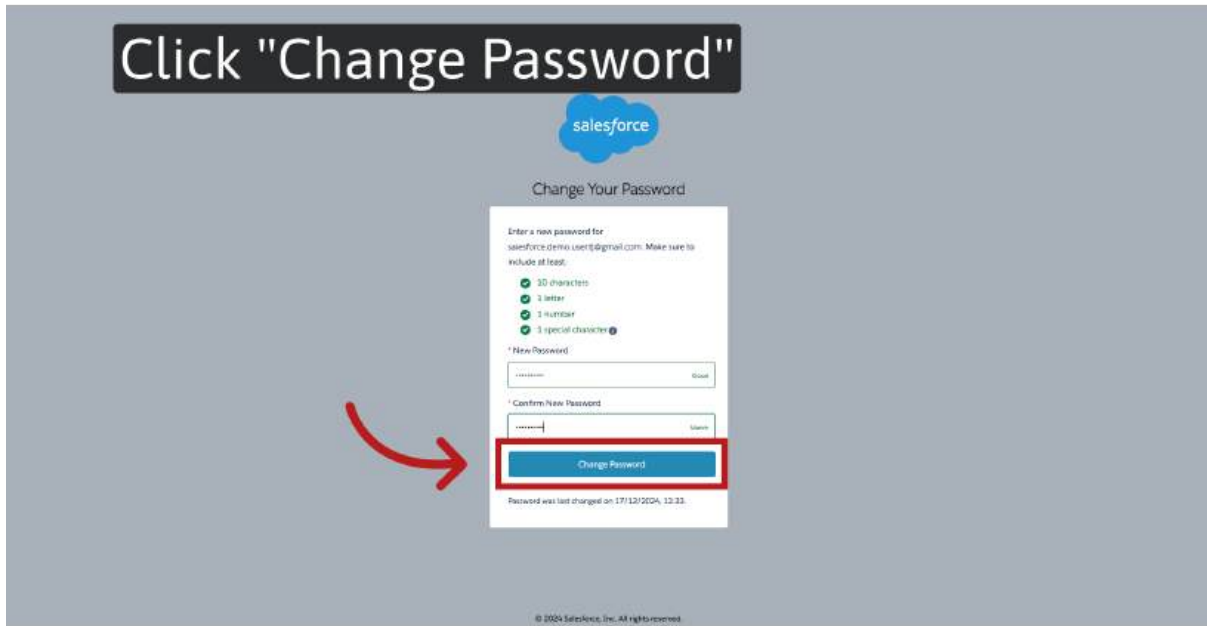
4. Click the link
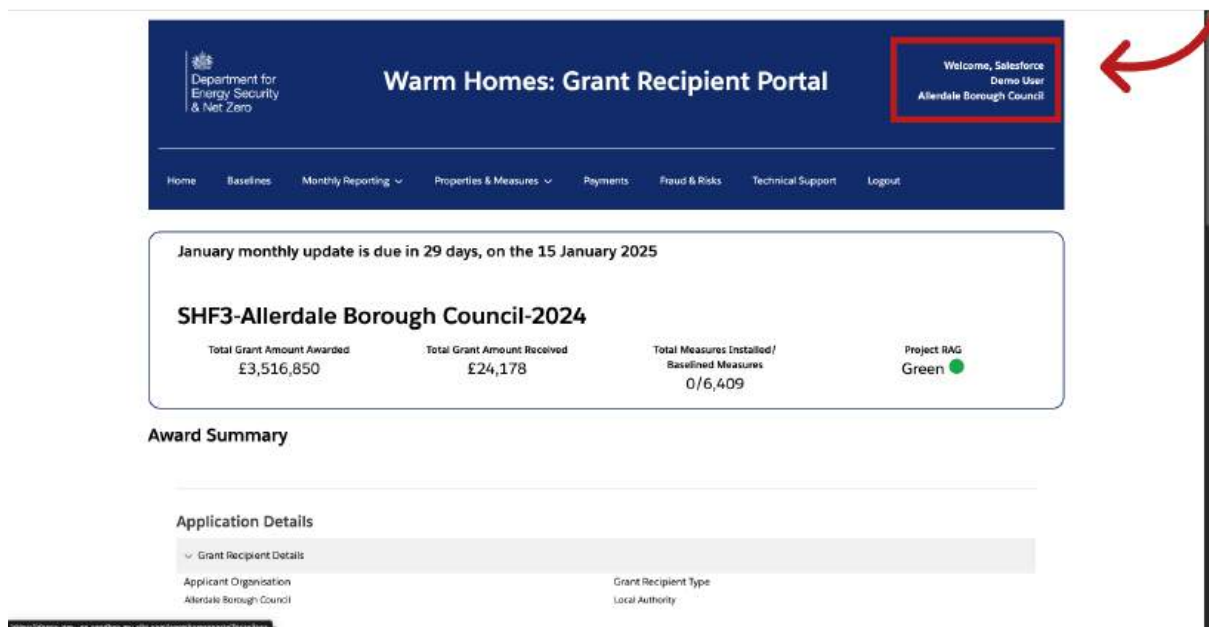
Navigate to the next step by clicking on the link.
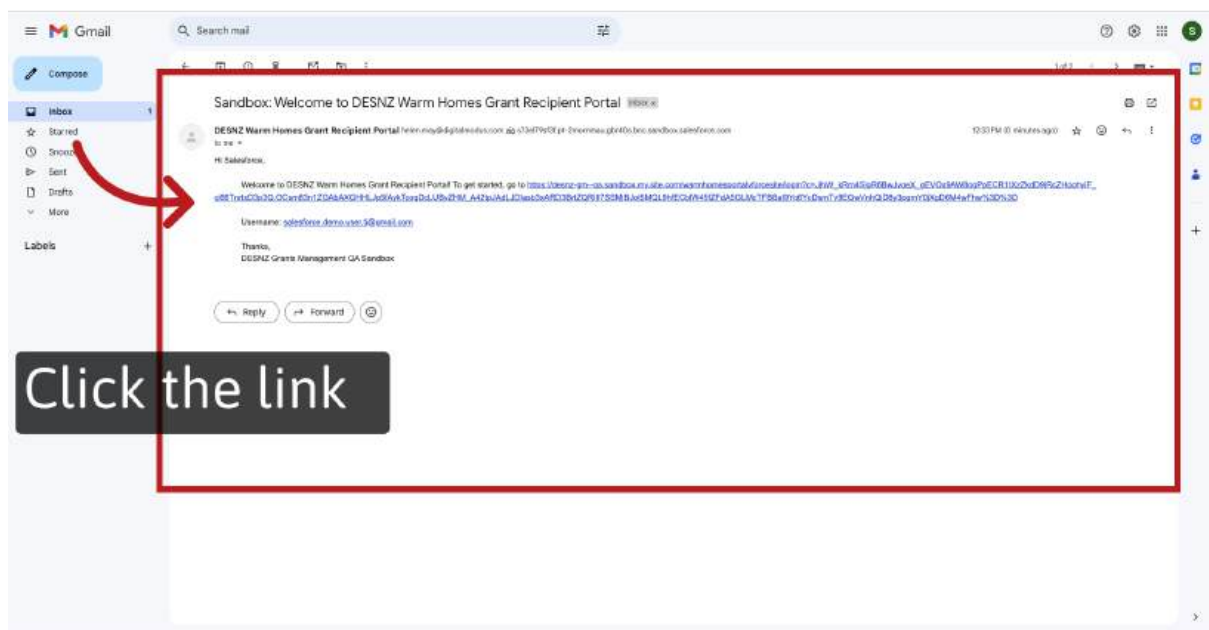
5. Click "Change Password"

Create your password by entering it in and clicking on "Change Password.

6. Logged in as...

Once logged in, you will land on the home page. You can see that "Salesforce Demo User" of Allerdale Borough Council is logged in.

7. Home Page

"Home" is the first tab in the navigation bar.

8. Notice for Monthly Update Due

View important information on the home page, including when the next monthly update is due...

9. Key Funding Award Details

Name of the Funding Award; and roll up summary fields - Total Grant Amount Awarded and received-to-date; and Total Measures Installed.

10. Overview of Home Page

Other key information resides on the home page, including data submitted upon Application (which you can see in black); and Actuals data submitted within the project (differentiated by blue font).

11. The "Baselines" Tab

Next Up is "Baselines" in the navigation bar.

12. Baselines Overview

Here, you will find a list of Active, Draft and Historic Baselines in a table, and once a record is selected, you can see its contents displayed below the table. Please note that Grant Recipients cannot make amendments to Baselines themselves. A change request will need to be made, and once approved, a Delivery Partner will make the changes in the back end.

13. Click "Monthly Reporting"

Next, is Monthly Reporting
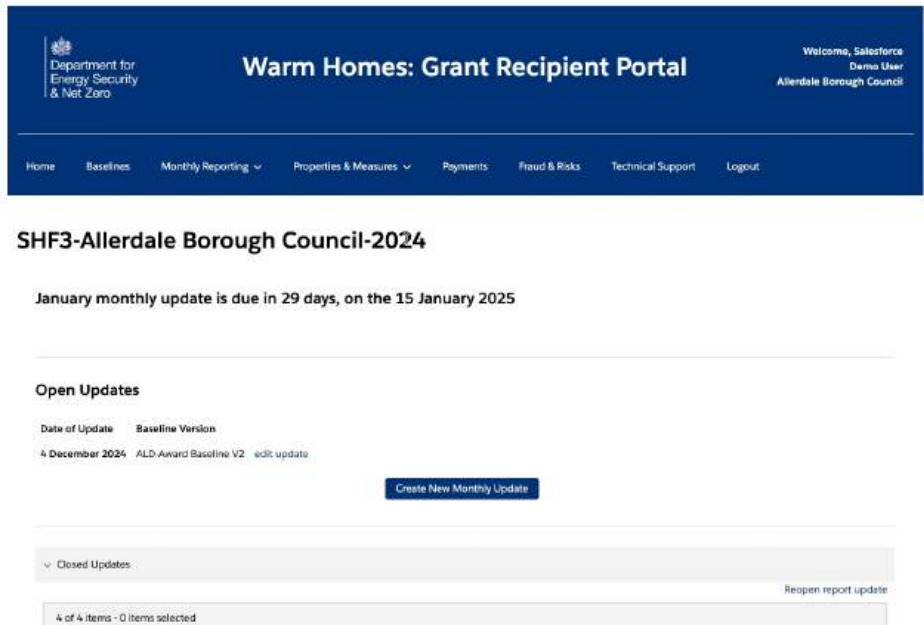
14. Click "Monthly Updates"

Click on "Monthly Updates".


15. Monthly Update

This is where you must submit your reporting by the 10th working day of the month. Once a report is created it will remain in the "Open Updates" section and be editable until the deadline. You can also view historical monthly updates in the table below, named "Closed updates". Click on a Funding Award Update record to see the full

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

16. Click "Monthly Actuals"

Next Up is "Monthly Actuals".
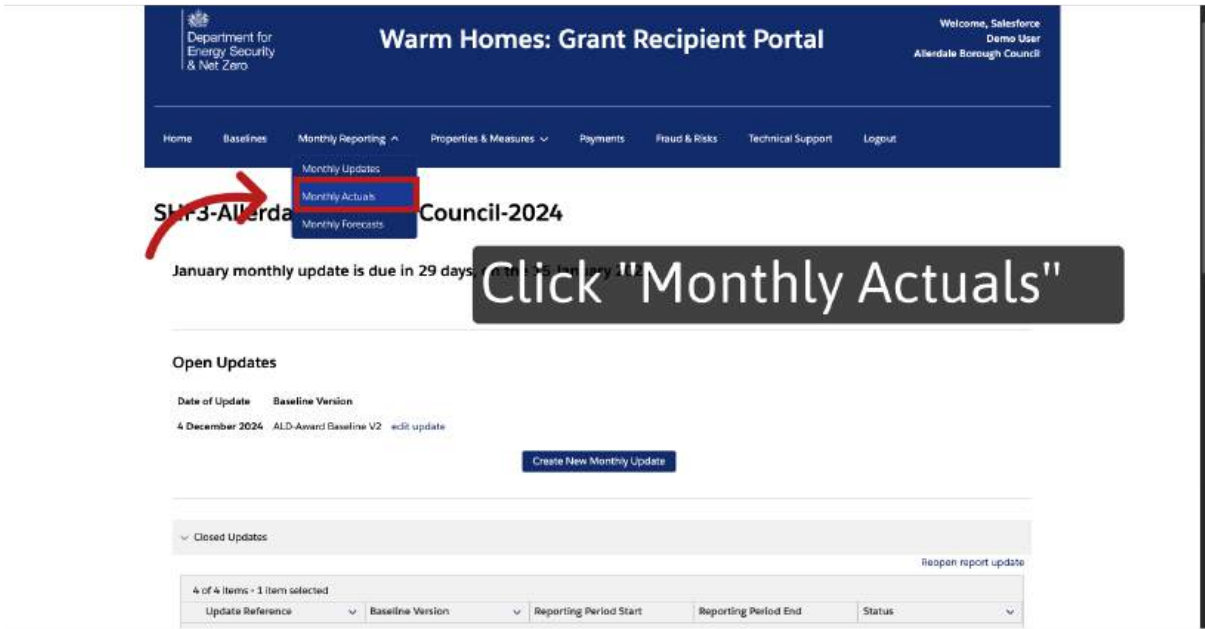
17. Overview

Again, this is an area for Grant Recipients to create, and view historical data. Update DEZNZ with, for example, how many homes have begun installation, versus treated and completed, in that month.

18. Click "Monthly Forecasts"

The last tab in Monthly Reporting is Monthly Forecasts.

19. Monthly Forecast Overview

Here, you can review any forecasts, created by Delivery Partners. We delve into submitting monthly reports later on in this guide, simply forward to 3 minutes 30, or navigate to the mini guide: WH007

20. "Properties and Measures" Overview

Now for the "Properties and Measures" Section. This is where you will input addresses to have them matched by the Ordinance Survey Match and Cleanse Service. Matched addresses will go on to be validated by Trustmark and have measures associated. After which, you can then add total costs by measure. We delve into how to do just that, later on in this guide, simply forward to 5 minutes 15, or navigate to the mini guide: WH009

21. "Payments" Overview

Click "Payments to view a list of payments either to be made or already made to you, where you then have the ability to mark the payment as received. We delve into marking payments as received later on in this guide, simply forward to 7 minutes fifty-nine, or navigate to the mini guide: WH013

22. "Fraud & Risks" Overview

Click "Fraud and Risks" to raise new cases, and to view a list of historical cases, related to fraud, error, risks and issues on the project We explore raising cases in the portal later on in this guide, simply forward to 8 minutes 40, or navigate to the mini guide: WH015

23. Click "Technical Support"

Click "Technical Support" to raise new cases, and to view a list of historical cases, related to IT issues.

24. Click "Logout"

Log out of the portal by clicking on "Logout."

25. Submitting Monthly Reports

Let's delve into submitting Monthly Reports.

26. 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".

27. Create New Monthly Update

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

28. Click "Go to Actuals"

Click "Go to Actuals"

29. Select an Active Baseline

Click on an an active baseline

30. Fill in Actuals

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

31. 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.

32. 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

Monthly Update: Forecast
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

*Forecast Start Date	*Forecast End Date
1 Feb 2025	28 Feb 2025
Format: 31 Dec 2024	

⌄ Finance Forecast

*Grant Capital Spend ⓘ	*Grant A&A Spend ⓘ
*Co-funding total spend ⓘ	*Combined A&A spend ⓘ
*Co-funding Capital Spend ⓘ	*Combined Capital Spend ⓘ

⌄ Homes Forecast

*Homes identified suitable for retrofit ⓘ

*No. of homes ready for installs to start ⓘ

*Homes started installations (KPI) ⓘ

33. Navigate back to Monthly Updates

Navigate back to Monthly Updates

Warm Homes: Grant Recipient Portal

Department for Energy Security & Net Zero

Welcome, Jane Doe
Allerdale Borough Council

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

SHF3-Allerdale Borough Council-2024

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	End of Reporting Period
1 Nov 2024	30 Nov 2024

⌄ Summary Details

*Date of Update	*Phase RAG Rating
17 Dec 2024	○ Red
	○ Amber
*Homes Approached ⓘ	○ Green

Navigate back to Monthly Updates

Cost of measures too high
Tenant refusal/access to home
Enabling works (either too costly or take too long)

34. Edit Monthly Updates Report

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

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	edit update
17 December 2024	ALD-Award Baseline V3	edit update

Create New Monthly Update

Closed Updates

Reopen report update

4 of 4 items · 0 items selected

Update Reference	Baseline Version	Reporting Period Start	Reporting Period End	Status
PUP-00003	ALD-Phase-1-Baseline V4	1 Sept 2024	30 Sept 2024	Closed
PUP-00001	ALD-Phase-1-Baseline V4	1 Oct 2024	31 Oct 2024	Closed
PUP-00012	ALD-Award Baseline V2	1 Dec 2024	31 Dec 2024	Closed
PUP-00016	ALD-Award Baseline V2	31 Dec 2024	1 Dec 2024	Closed

No Update Record Selected

35. 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	edit update
17 December 2024	ALD-Award Baseline V3	edit update

Create New Monthly Update

Closed Updates

Reopen report update

4 of 4 items · 0 items selected

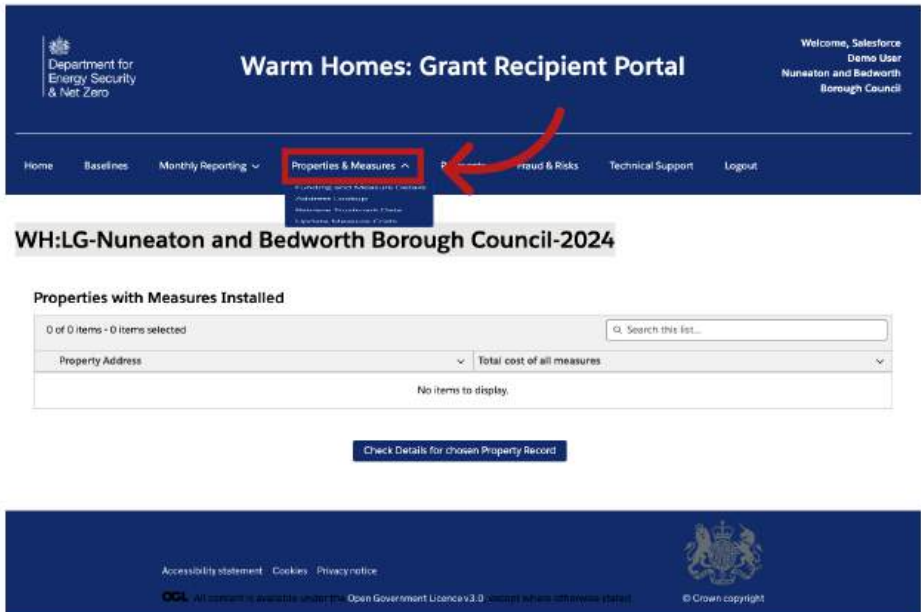| Update Reference	Baseline Version	Reporting Period Start	Reporting Period End	Status
PUP-00003	ALD-Phase-1-Baseline V4	1 Sept 2024	30 Sept 2024	Closed
PUP-00001	ALD-Phase-1-Baseline V4	1 Oct 2024	31 Oct 2024	Closed
PUP-00012	ALD-Award Baseline V2	1 Dec 2024	31 Dec 2024	Closed
PUP-00016	ALD-Award Baseline V2	31 Dec 2024	1 Dec 2024	Closed

No Update Record Selected

36. Managing Properties, Measures & Measure Costs

Now, Let's delve into Managing Properties, Measures & Measure Costs

37. Click the "Properties & Measures" tab
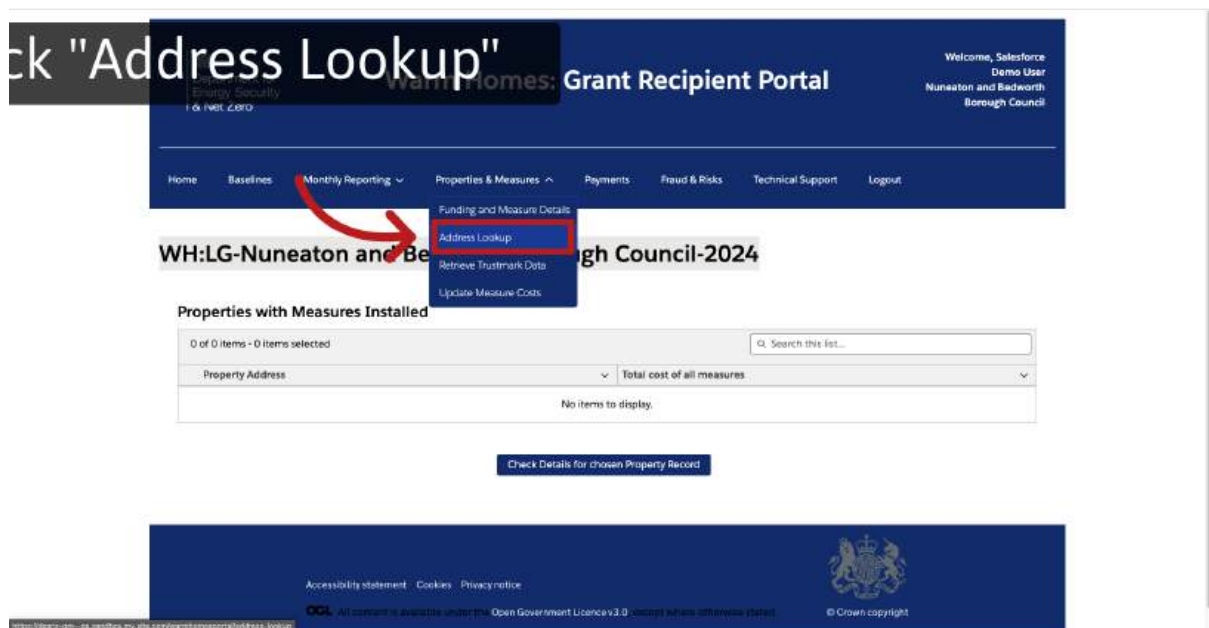
Click the "Properties & Measures" tab

38. "Properties with Measures Installed"

This is a brand new Funding Award with no properties, measures or costs associated with it. That is why there are currently no records in the "Properties with Measures Installed" table.

39. Click "Address Lookup"

To begin the process, click "Address Lookup".

40. Fill here

This is where the system will validate the addresses you have with address data from the Ordinance Survey. Please note that you can only submit up to 100 addresses at once, so you are advised to perform this process regularly, so that they can be processed in small chunks.

41. Overview

Ensure that each component is separated by a comma, and each address sits on its own line.

42. Click "Submit Addresses for OS Matching"

Submit the addresses for matching

43. OS Matched Addresses

This page, headed "OS Matched Addresses" will show you your addresses that had either a "good" or "exact" match with those in the Ordinance Survey.

44. "Proceed to Next Step"

"Proceed to Next Step"

45. OS Partial Match Addresses

This page shows you "OS Partial Match Addresses". You have the option to review the OS address and select which you would like to take forward.

46. OS Partial Match Addresses

In this example, only the two highlighted records will be taken forward to the next step.

47. Click "Proceed to next step"

Proceed to the next stage

48. No Match

Finally, you will be presented with those addresses that do not have a match with the Ordinance Survey. These addresses will be rejected and cannot be sent to Trustmark. In order to modify an address, please re-enter a valid address in the "Address Lookup" tab.

49. Click "Proceed to next step"

Click "Proceed to next step"

50. Click "Finish"

Complete the process

51. Click "Receive Trustmark Data"

Select the Receive Trustmark Data option.
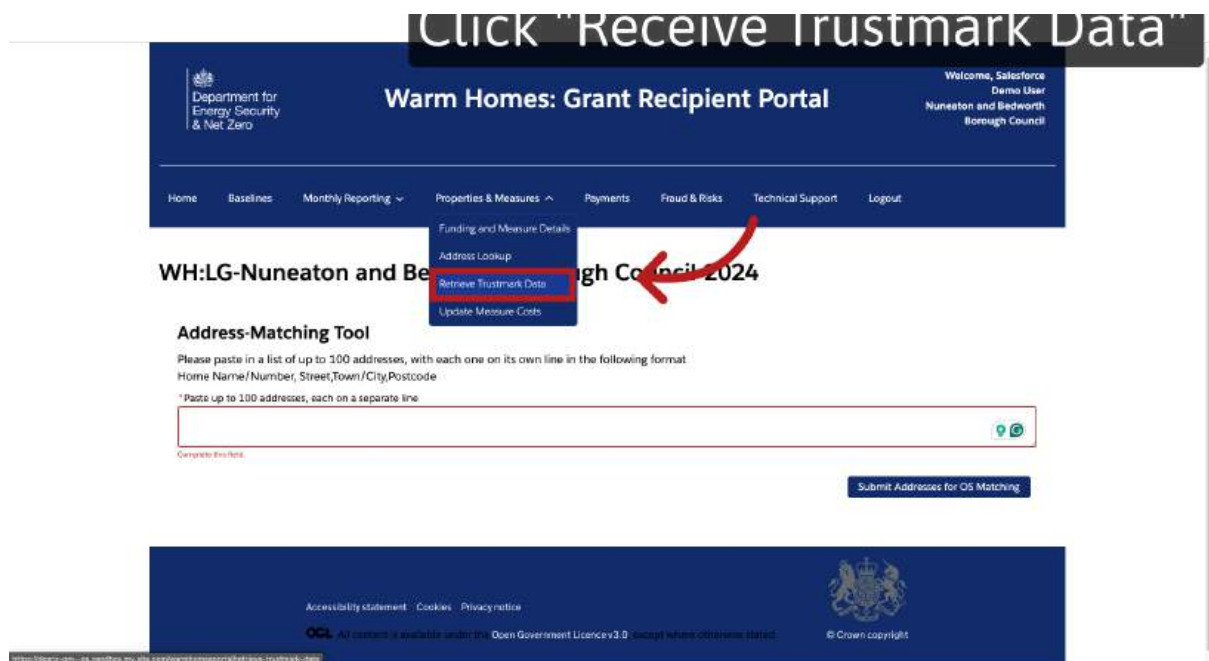
52. Addresses with Measures from Trustmark

On screen, you will see the addresses appended with measure types, date of completion and a Trustmark UMR code.

53. Click "Add costs to Trustmark Data"

proceed to the next step

54. Add costs to Trustmark Data"

Now add "cost of single measure" against the property data and select "next".

WH:LG-Nuneaton and Bedworth Borough Council-2024

Measure Cost Input

7 FINMERE WAY, SHIRLEY, SOLIHULL, , B90 3SS
Measure Type: Loft insulation where there is less than or equal to 100mm pre-existing insulation
Date of Completion: 6 March 2024
Trustmark UMR: P14574D3UL
Total Cost of Single Measure

7 FINMERE WAY, SHIRLEY, SOLIHULL, , B90 3SS
Measure Type: Programmer and room thermostat
Date of Completion: 7 March 2024
Trustmark UMR: P1457467FT
Total Cost of Single Measure

7 FINMERE WAY, SHIRLEY, SOLIHULL, , B90 3SS
Measure Type: First time central heating (FTCH)
Date of Completion: 8 March 2024
Trustmark UMR: P14574CD8E
Total Cost of Single Measure

7 FINMERE WAY, SHIRLEY, SOLIHULL, , B90 3SS
Measure Type: Window glazing - improved double glazing
Date of Completion: 13 November 2024
Trustmark UMR: P18771DLKP
Total Cost of Single Measure

55. Measure Cost Input Page

If you do not have all the costs handy, you can fill in any that you do have and leave the rest for another time. The list will be on the screen shown. If you navigate away, to get back to this screen, Simply navigate back to "Properties and Measure" then "Update Measure Costs".

56. Navigate to Properties with Measures Installed

Now, if you navigate to the first option in the "Properties & Measures" tab, "Funding & Measure Details", you will see a list of addresses that, once expanded, show you all associated measures and costs.

57. View Properties with Measures Installed

Click "Check Details for chosen Property Record".

58. Click "Return to Property List"

Go back by clicking "Return to the Property List".

59. How to View and Confirm a Payment

Now, lets dig into how to View and Confirm a Payment

60. Grant Recipient Homepage

Upon logging in to the Portal, this is the Grant Recipients homepage.

61. Grant Recipient

Your name and who you represent can be seen in the top corner.

62. Click "Payments" in the Portal

To confirm a payment, first navigate to the Payments tab from the menu bar.

63. Click here

Here, you will see a list of any "Payments awaiting confirmation of receipt", associated with your Funding Award, regardless of status.

64. Select Record

To confirm receipt, click to select the relevant payment record.

65. Click "Select Record above and Confirm Payment Received"

Then click on the "Select Record above and Confirm Payment Received" button, to confirm that the payment has been received.

66. Validate Confirmed Payment in Portal

The record will now show in the table below as confirmed.

67. How to Raise Cases in the Portal

Now, let's look into how to Raise Cases in the Portal
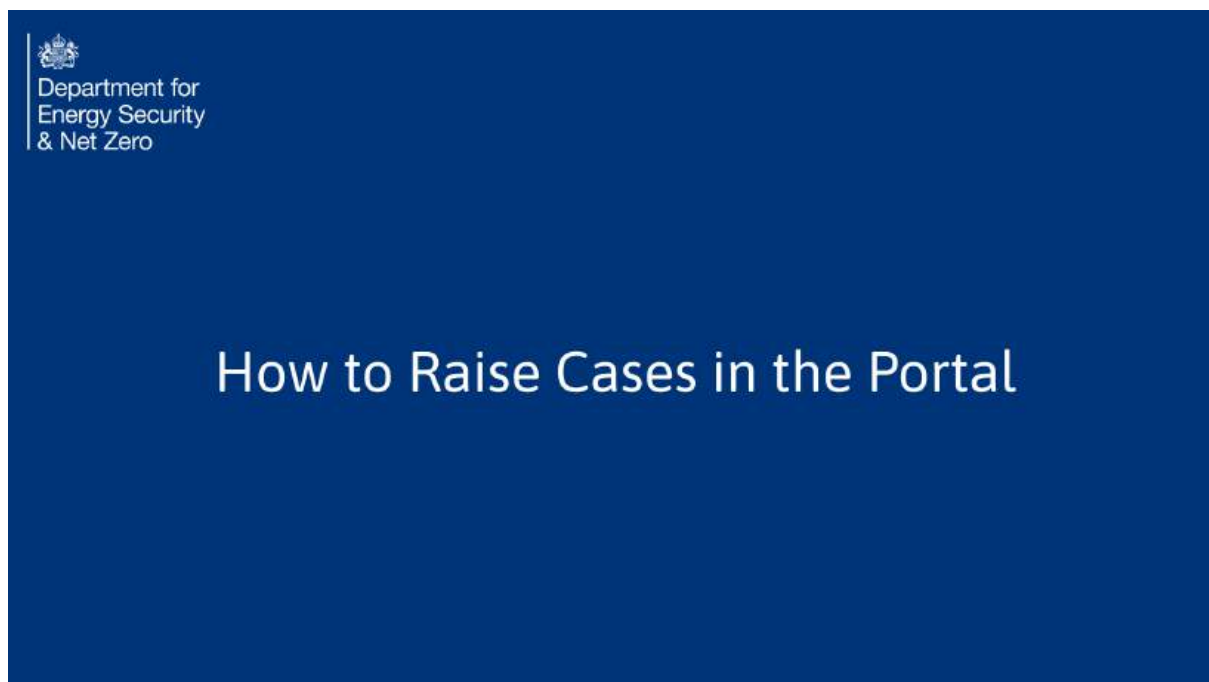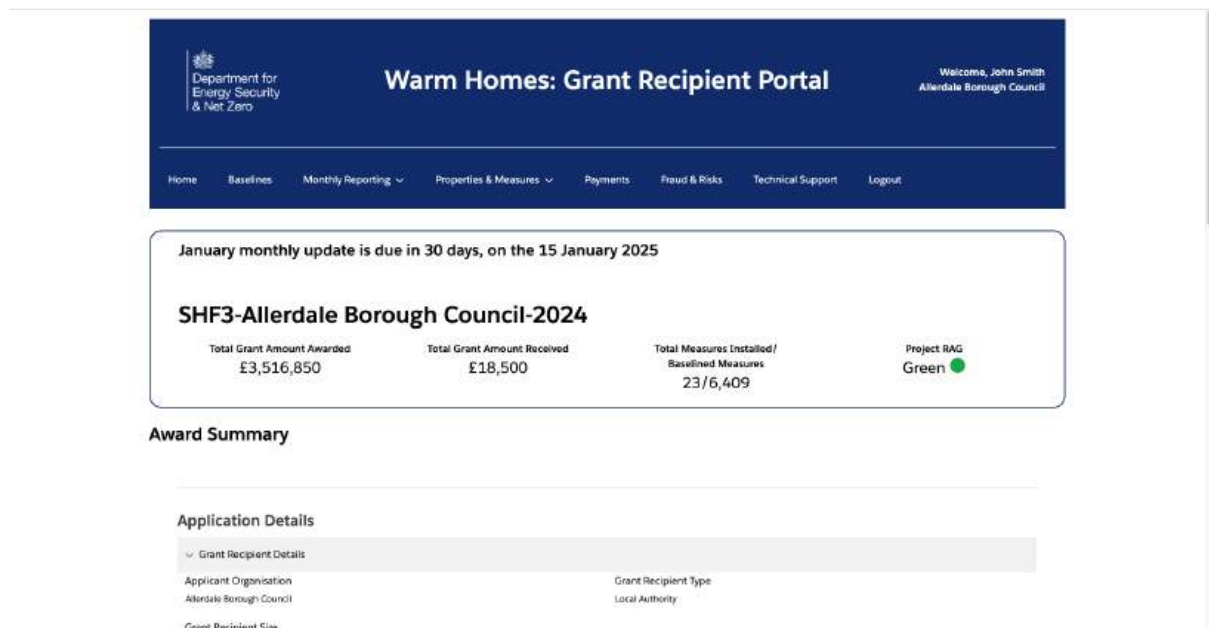
68. Grant Recipient Portal: Raising a Support Case

Starting with how a support case is raised by a Grant Recipient.

69. Grant Recipient Homepage

Upon logging in to the Portal, this is the Grant Recipients homepage.

70. Grant Recipient

Your name and who you represent can be seen in the top corner. In this case, John Smith from Allerdale Borough Council.
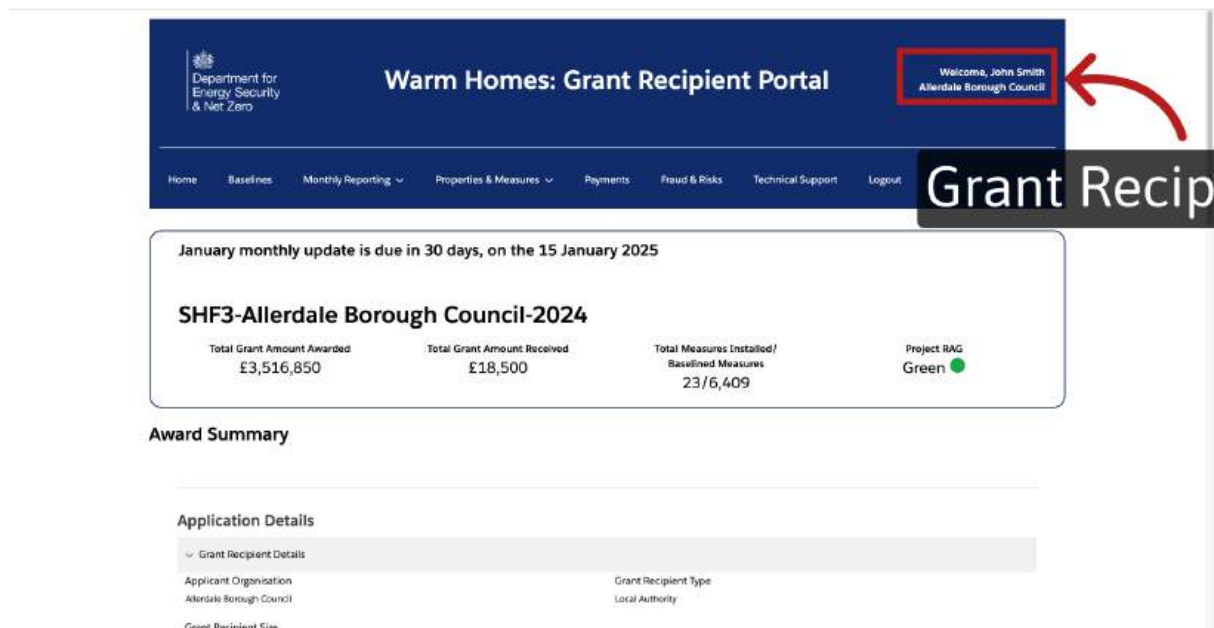
71. Click "Technical Support"

To raise an I.T. support case, click to navigate to the "Technical Support" tab.
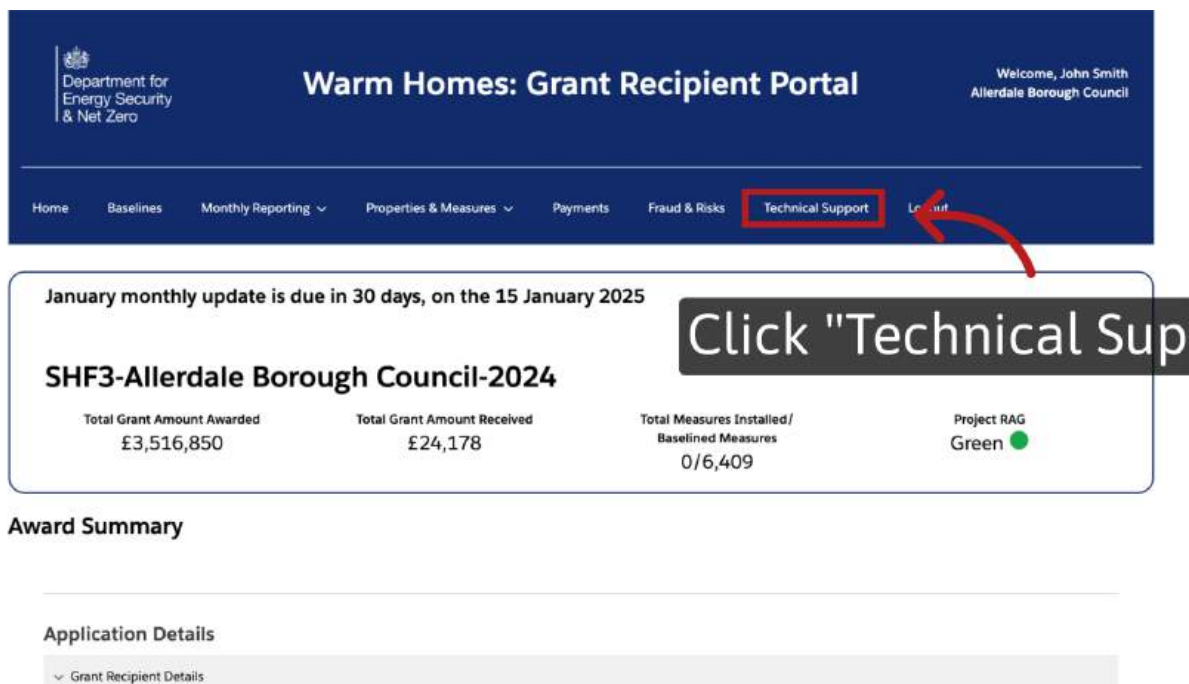
72. View List of Support Cases

You will be presented with a list of all support cases related to your Funding Award, even if raised by another grant recipient, who has access to it.

73. Support Case Details

When clicking on any of the records, you will see data displayed on the right-hand side of the screen.

74. Click "Create Support case"

To initiate a new support case, click on the "Create Support Case" button.

75. Creating a Support Case

Enter a support summary and a description of the issue and then select "Next".

76. Case Reference

You will be shown a confirmation message, with a new case reference number ending in 1025. You can now click "Finished".
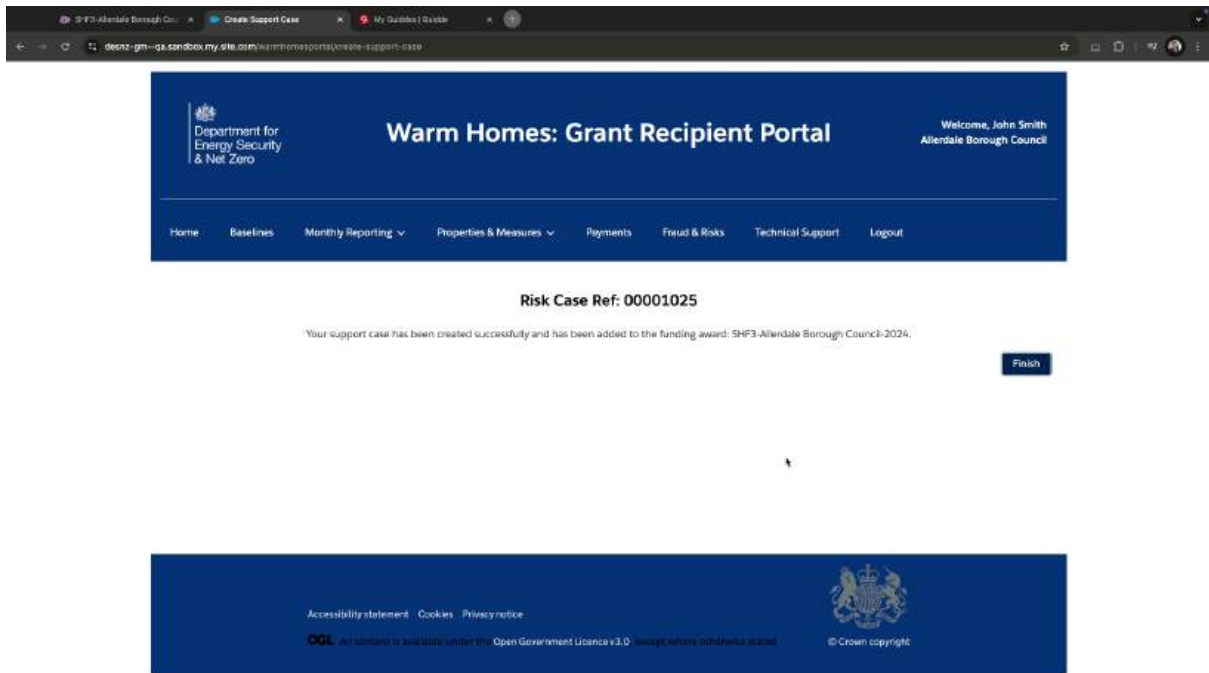
77. Support Case Table Updated

Case 1025 now exists at the top of the Support Case table.
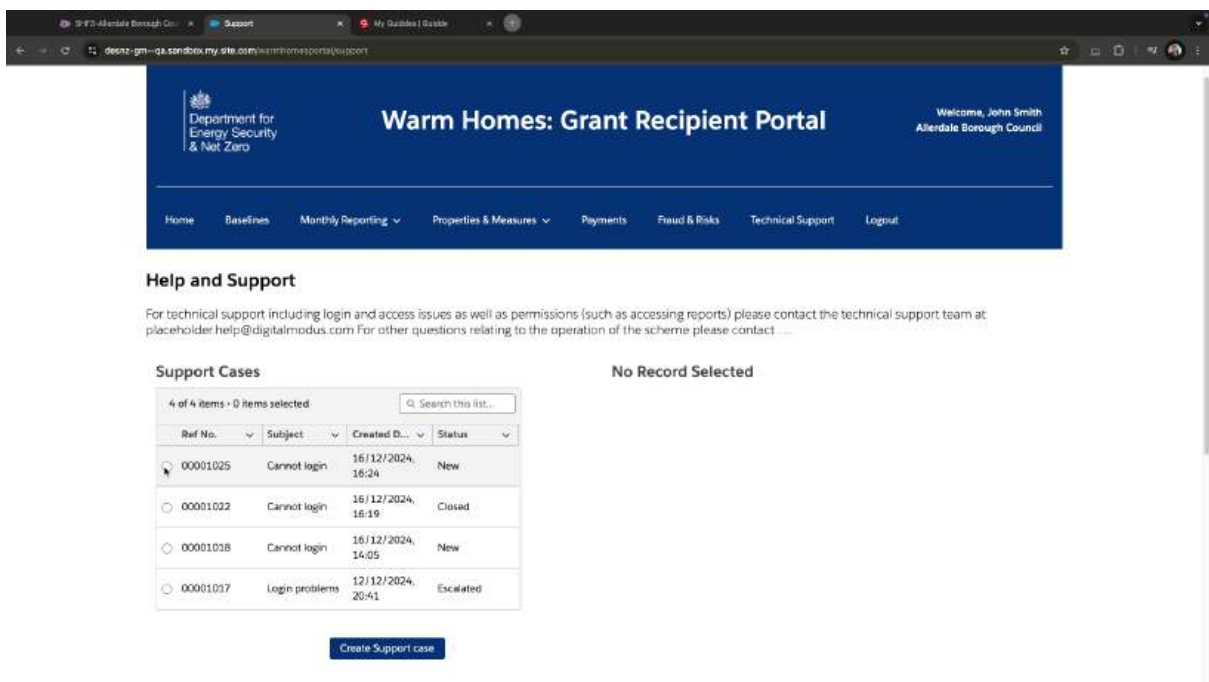
78. Grant Recipient: Raising Fraud and Error Cases

Next, how Grant Recipients can raise a Fraud or Error Case.

Grant Recipient:
Raising Fraud and Error Cases

79. Click "Fraud & Risks"

You can raise a case related to either fraud, error, risks, or issues by navigating to the tab named "Fraud & Risk".

80. Fraud or Error Cases

At the top, you will be shown a list of all of the fraud and risk cases. When clicking on any of the records, you will see data displayed on the right-hand side of the screen.

81. Create New Fraud or Error Case

Click on the button to "Create Fraud or Error Case". The first two are picklist fields, with values to choose from to select a Summary of Risk, and then a Category of Risk relating to it.

82. Add Case Details

Then there are free-text fields to describe the Fraud Summary and Fraud Description.

83. Case Reference

The new case reference number will then be displayed, in this example 1026.

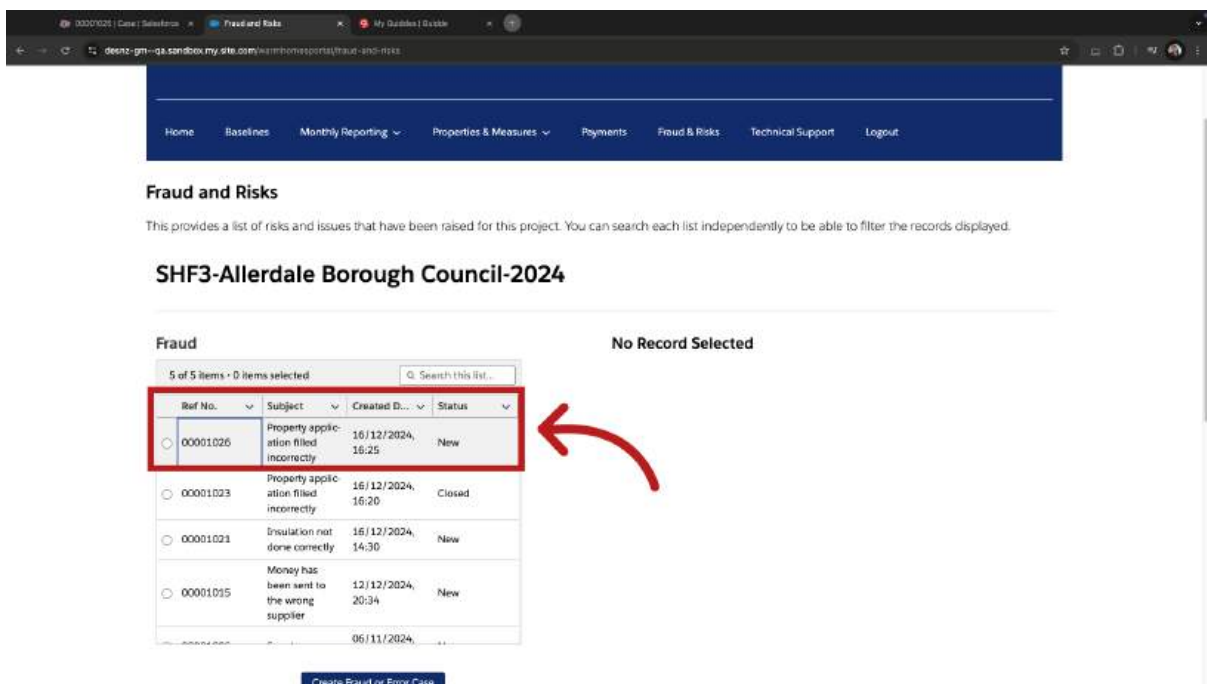

84. Click "Finish"

You can conclude the process by clicking "Finish".
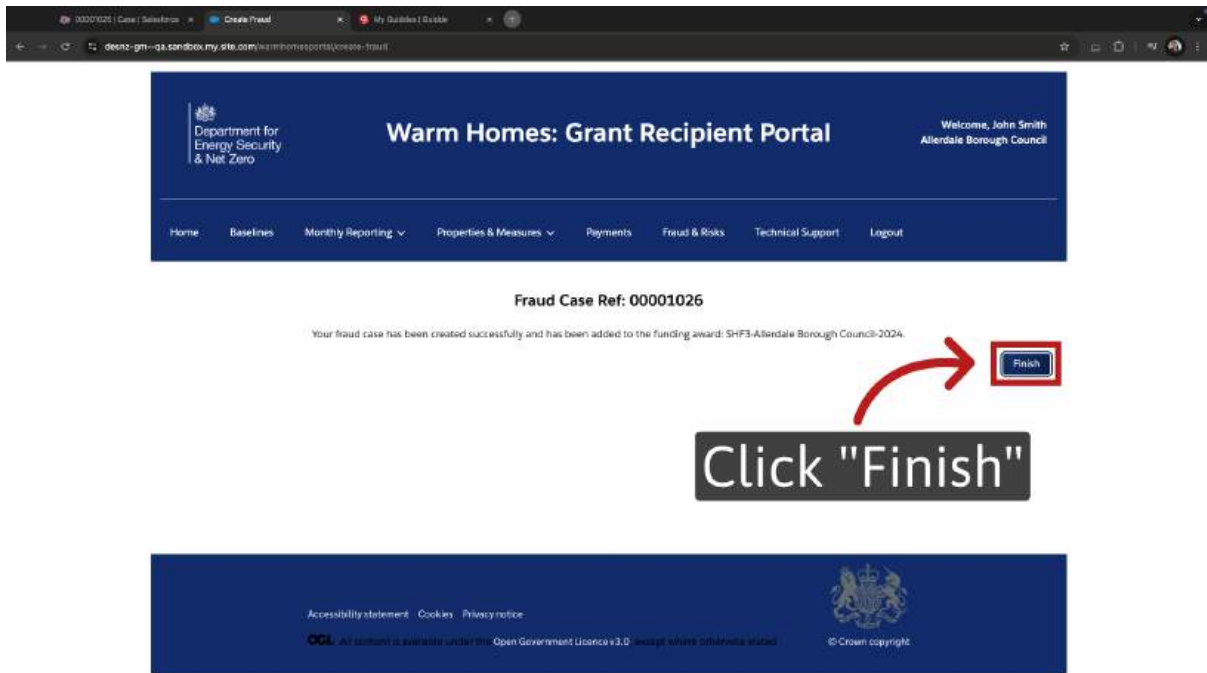
85. View New Case

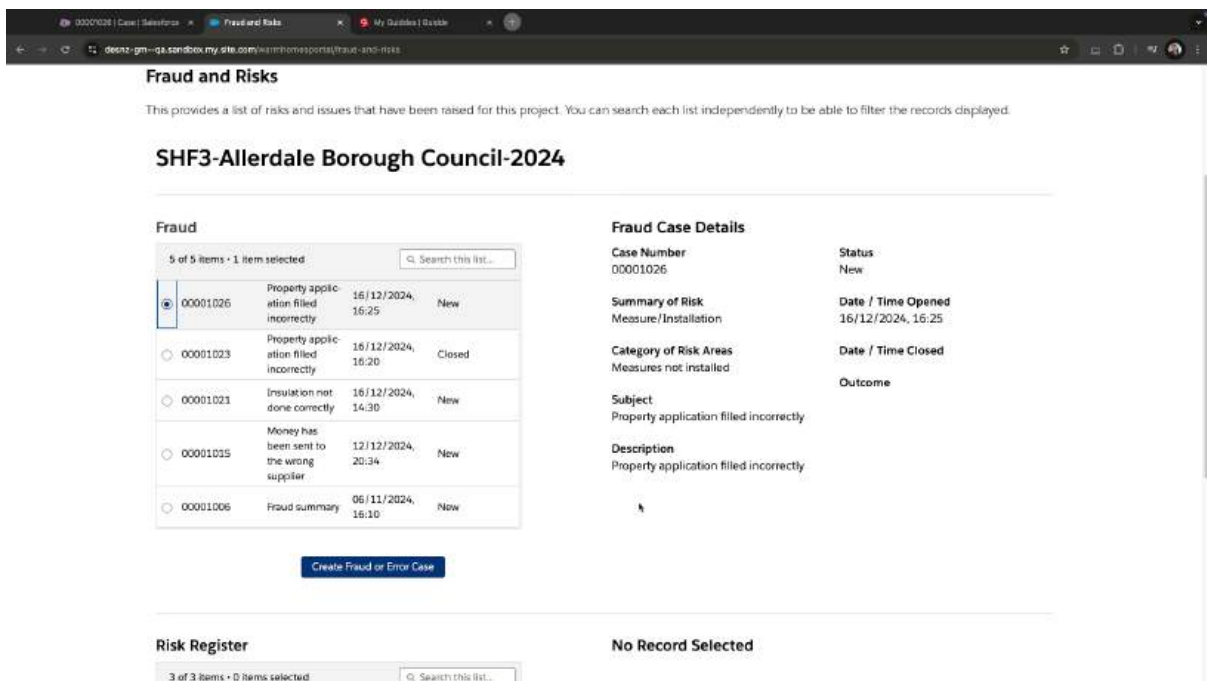The newly created case 1026, is now at the top of the list.

86. Grant Recipient: Raising Risk or Issue Cases

Next, how Grant Recipients can raise a Risk and Issue Case from the portal.

87. Risk or Issue Cases

Scrolling down on the Fraud and Risks tab presents the list of Risk and Issues that have been raised to date.

88. Create a New Risk or Issue Case

You can also raise a case related to risks or issues. Then you will be able to select a Risk Category from the picklist, followed by writing the Risk or Issue Summary and Description.

89. Click "Finish"

You can finalise the process by selecting "Finish". Note that this case reference is 1027.

90. Risk Register List

Case 1027 will now show on the Risk Register.

Thank you for watching. This guide provided a System Overview for DESNZ Grant Recipients. It covered navigating around the portal; submitting monthly reporting; managing properties, measures, and costs; reviewing and confirming grant payments, and raising cases.

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