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. 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



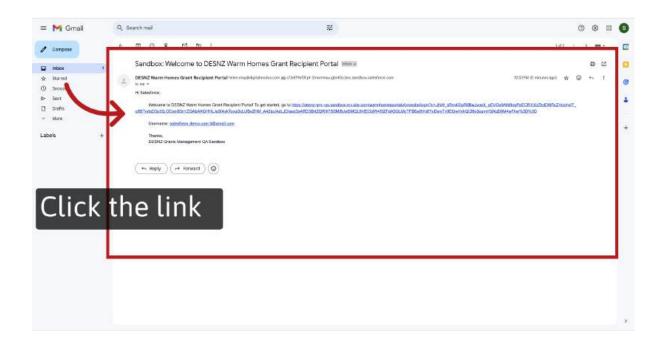
3. Click "Sandbox : Welcome to DESNZ Warm Homes Grant Recipient Portal"

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.

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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.

Click "Change Password"	
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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.

Department for Energy Security & Net Zero	Warm Homes: Gra	nt Recipient Portal	Welcome, Salesforce Demo User Allerdale Borough Council
Home Baselines Monthly Reportin	g 🗸 Properties & Measures 🗸 Peyr	ments Plaud & Risks Technical Support	Logost
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SHF3-Allerdale Bor	ough Council-2024		
Total Grant Amount Awarded £3,516,850	Total Grant Amount Received £24,178	Total Measures Installed/ Baselined Measures 0/6,409	Project RAG Green
ward Summary			
Application Details			

7. Home Page

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

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SHF3-Allerdale Bor Total Grant Amount Awarded £3,516,850	Total Grant Amount Received	Baselined Measures	

8. Notice for Monthly Update Due

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

Department for Energy Security & Net Zero	Warm Homes: Gra	nt Recipient Portal	Welcome, Salesforce Demo User Allendale Borough Council
Home Baselines Monthly Reporting	g 🗸 Properties & Measures 🗸 Poye	ments Fraud & Risks Technical Support	Logout
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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.

Department for Energy Security & Net Zero	Warm Homes: Gr	ant Recipient Portal	Demo User Allerdale Borough Council
Home Baselines Monthly Reportin	ng ∽ Properties & Measures ∽ P	Fundin	g Awar
January monthly update is d	lue in 29 days, on the 15 Janu	ary 2025	/
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SHF3-Allerdale Bor	ough Council-2024		
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Total Grant Amount Awarded £3,516,850	Total Grant Amount Received	BaseEned Measures	
Total Grant Amount Awarded £3,516,850 Award Summary	Total Grant Amount Received	BaseEned Measures	

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).

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HF3-Allerdale Bo	rough Council-2024		
Total Grant Amount Awarded £3,516,850	Total Grant Amount Received £24,178	Total Measures Installed/ Baselined Measures 0/6,409	Project RAG Green
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11. The "Baselines" Tab

Next Up is "Baselines" in the navigation bar.

Department for Energy Security & Net Zero	Warm Homes: G	rant Recipient Portal	Welcome, Salesforce Demo User Allerdale Borough Council
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Award Summary			E.
Application Details			
😔 Grant Recipient Details			

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.

Department for Energy Security & Net Zero	Warn	n Homes: (Grant Re	cipien	t Portal		Demo User Allerdale Borough Council
ne BaseEnes Mo	nthly Reporting 🗸 🛛 Pr	roperties & Measures 🗸	Payments A	raud & Risks	Technical Support	Logout	
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13. Click "Monthly Reporting"

Baseline Version

Next, is Monthly Reporting

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10 of 10 items - 1 item selected Baseline Version	 Start Date 	Trains .	
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ALD-Phase-1-Baseline V7			
ALD-Phase-1-Baseline V7 ALD-Phase-1-Baseline V7	1 Oct 2024	Daft	
	1 Oct 2024	Draft Historic	
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ALD-Phase-1-Baceline V7 ALD-Phase-1-Baceline V1 ALD-Phase-1-Baseline V1 ALD-Phase-1-Baseline V4	1 Oct 2024 1 Oct 2024	Historic Historic	
ALD-Phase-1-Baseline V7 ALD-Phase-1-Baseline V1 ALD-Phase-1-Baseline V4 ALD-Phase-1-Baseline V2	1 Oct 2024 1 Oct 2024 1 Oct 2024	Historic Historic Historic	
ALD-Phase-1-Baceline V7 ALD-Phase-1-Baceline V1 ALD-Phase-1-Baseline V1 ALD-Phase-1-Baseline V4	1 Oct 2024 1 Oct 2024	Historic Historic	
ALD-Phase-1-Baseline V7 ALD-Phase-1-Baseline V1 ALD-Phase-1-Baseline V4 ALD-Phase-1-Baseline V2 ALD-Phase-1-Baseline V3	1 Oct 2024 1 Oct 2024 1 Oct 2024 1 Oct 2024	Historic Historic Historic Historic	

14. Click "Monthly Updates"

Click on "Monthly Updates".

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ALD-Phase-1-Baseline V7	1 Oct 2024		Draft	
ALD-Phase-1-Baseline V1	1 Oct 2024		Historic	
ALD-Phase-1-Baseline V4	1 Oct 2024		Historic	
ALD-Phase-1-Baseline V2	1 Oct 2024		Historic	
ALD-Phase-1-Baseline V3	1 Oct 2024		Historic	1
ALD-Award Baseline V2	1 Apr 2025		Historic	
: Baseline Version ALD-Phase-1-Baseline V2				

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.

Department for Energy Security & Net Zero	Wa	rm Homes:	Grant I	Recipier	nt Portal		Welcome, Salestor Denio Ur Allerdale Borcugh Coun
ome Baselines	Monthly Reporting ~	Properties & Measures 🗸	Payments	Fraud & Risks	Technical Support	Logout	
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Open Updates Date of Update Ba	seline Varsion	ipđate					

16. Click "Monthly Actuals"

Next Up is "Monthly Actuals".

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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.

Department for Energy Security & Net Zero	Wa	arm Homes:	Grant I	Recipien	t Portal		Welcome, Salesforce Dema User Allerdale Borough Council
ome Baselines	Monthly Reporting ~	Properties & Measures 🛩	Payments	Fraud & Risks	Technical Support	Logout	

SHF3-Allerdale Borough Council-2024

Monthly Actuals		*			
7 of 7 items - 0 items selected				Q. Search t	tvs Est
Funding Award Actual Name	v	Parent Baseline Version	Actuals Start Dat	•	Actuals End Date
ACT-00008		ALD Phase-1-Baseline V4	1 Dec 2024		31 Dec 2024
O UPD-00001		ALD-Phase-1-Baseline V3	1 Nov 2024		30 Nov 2024
O ACT-00009		ALD-Phase-1-Baseline V4	1 Nov 2024		30 Nov 2024
O ACT-00012		ALD-Award Baseline V2			
O UPD-00003		ALD Phase-1 Baseline V3			
UPD-00002		ALD-Phase-1-Baseline V3			
O UPD-00000		ALD-Phase-1-Baseline V3			

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18. Click "Monthly Forecasts"

The last tab in Monthly Reporting is Monthly Forecasts.

Department for Energy Security	Warm Homes: G	rant Recipier	nt Portal Alerdale Boro	, Salesforce Demo User ugh Council
& Net Zero	Cli	ck "Mo	onthly Fore	eca
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7 of 7 items - 1 item selected	Perent Seseline Version ALD Phase 1-Baseline V4 ALD Phase 1-Baseline V4	and the second second second	Actuals End Date	
7 of 7 items - 1 item selected Funding Award Actual Name ACT-00C06	ALD-Phase-1-Baseline V4	1 Dec 2024	Actuals End Date 31 Dec 2024	
7 of 7 items - 1 item selected Funding Award Actual Name ACT-00008 UPD-00001	ALD-Phase-1-Baseline V4 ALD-Phase-1-Baseline V3	1 Dec 2024 1 Nov 2024	Actuals End Data 31 Dec 2024 30 Nov 2024	
7 of 7 items - 1 item selected Funding Award Actual Name ACF-00008 UPD-00001 ACF-00009	ALD-Phase-1-Baseline V4 ALD-Phase-1-Baseline V3 ALD-Phase-1-Baseline V4	1 Dec 2024 1 Nov 2024	Actuals End Data 31 Dec 2024 30 Nov 2024	
7 of 7 items - 1 item selected Funding Award Actual Name ACF-00008 UPD-00001 ACF-00009 ACF-00002	ALD-Phase-1-Baseline V4 ALD-Phase-1-Baseline V3 ALD-Phase-1-Baseline V4 ALD-Award Baseline V2	1 Dec 2024 1 Nov 2024	Actuals End Data 31 Dec 2024 30 Nov 2024	

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

	Reporting 🗸	Properties & Measures 🗸 🛛 P	aymer	ts Fraud & Risks	Technical Support	Logour	
	18	121 2012021210					
F3-Allerdale B	orough	Council-2024					
Ionthly Forecasts							
of 3 items - 0 items selected							
Forecast Reference	~ I	Baseline Version	÷	Forecast Start Date	Fo	recast End Date	
FOR-00015		Baseline V0		1 Jul 2025	31	Jul 2025	
FOR-00006		ALD-Phase-1-Baseline V4		1 Jan 2025	31	Jan 2025	
FOR-00009		ALD-Phase-1-Baseline V4		1 Oct 2024	31	Oct 2024	
o Forecast Record Selecte	d						

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

Baselines Monthly Reporting -	Update Measure Costs	Technical Support Logout	
0 of 0 items - 0 items selected		Q. Search this list	
Property Address	 Total cost of all measures 		~
	No items to display. Check Datalis for chosen Property Record		

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

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Payment Reference	v Amount	£8,000.00 £5,678.00	24/10/2024, 12:00		16/12/2024, 12:00	~	Payment Received
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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

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23. Click "Technical Support"

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

Departmen Energy Sec & Net Zero		Warm Hom	nes: Grant Recipient Portal	Welcome, Salesforce Demo User Allendale Borough Council
Home Basel	nes Monthly	Reporting - Properties & Meas	sures v Reyments eks Technical Support Logout	
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		s that have been raised for this	s project. You can search each list independently to be able to filter th	e records displayed.
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SHF3-All	erdale Bo		2024	e records displayed.
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SHF3-All Fraud 5 of 5 items + D ite Ref No.	erdale Bo ms selected Subject ~ Property applic ation filled	Q. Search this litt Created D Status Status 16/12/2024. Cleant	2024	e records displayed.

24. Click "Logout"

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

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Home Base	ines Monthly	Reporting - Pro	operties & Measures	✓ Payments Praud & Risks International Total Total Stress International Stress Internationa Stress Internationa Stress Internationa	ogout
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or technical supp	ort including logi				
	digitalmodus.co			issions (such as accessing reports) please contact the techn e operation of the scheme please contact	nical support team at
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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".

Department for Energy Security & Net Zero	w	/arm Homes	: Grant F	Recipier	nt Portal	Ale	Welcome, Jane Doe erdale Boreugh Council	
Home Baselines	Monthly Reporting ~	Properties & Measures ~	Payments	Fraud & Risks	Technical Support	Logout		
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1						Re	sopen report update	
4 of 4 items - 0 ite	rtis selected							

27. Create New Monthly Update

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

sur update later. Updates cannot be edited after the du		reating the first draft then enter 0 or dummy text/dates for that data ar	io record to titts it
art 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	
"Homes Approached 🔘		⊙ Amber ⊛ Green	
		Reasons not receiving installations (use CTRL + Click to select more th Cost of measures too high	ian one option/ 👹
		Terant refusal/access to home	
		Enabling works (either too costly or take too long)	
		Home already at EPC C	
		Home has measures already	
Narrative			
- Narauve			
You should use this area to explain any variations in yo	ur monthly report between the actua	als and the forecast. For example, you should note reasons for any diffe	rence in the Key
Performance Indicator figures. This will help when asse			
Plan for Next Month			

28. Click "Go to Actuals"

Click "Go to Actuals"

*Date of Update	*Phase RAG Rating
17 Dec 2024 🔳) Red
"Homes Approached 6	O Amber
454	 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 actu Performance Indicator figures. This will help when assessing the status of this project.	als 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:	
Performance Indicator figures. This will help when assessing the status of this project. *Blan for Next Month	als and the forecast. For example, you should note reasons for any difference in the key Click "Go to Actua
Performance Indicator figures. This will help when assessing the status of this project. *Plan for Next Month @ double check list *Progress Update @	Click "Go to Actua
Performance Indicator figures. This will help when assessing the status of this project.	Click "Go to Actua
Performance Indicator figures. This will help when assessing the status of this project.	Click "Go to Actua
Performance Indicator figures. This will help when assessing the status of this project.	Click "Go to Actua
Performance Indicator figures. This will help when assessing the status of this project.	Click "Go to Actua
Performance Indicator figures. This will help when assessing the status of this project.	Click "Go to Actua

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.

Actuals Start Date	"Actuals and Date
1 Nov 2024	30 Nov 2024
 Finance Actuals 	
Total Grant Received	
£24,856	
Grant Capital Spend 👩	*Grant A&A Spend: @
-1	
Co-funding to second and se	*Combined A&A spend
Co-funding Capital Spand D	
Combined Capital Spend 🛛 🕥	
12	
 Homes Actuals 	
Total homes to be treated (from Baseline)	*Homes Validated (KPD: 0
70,000 "Homes identified suitable for retrofit. @	
	1
"No. of homes ready for installs to start @	a
*Homes started installations (KPI)	
]
"Homes with all installations completed @	
*Home Completed (KPI)	

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.

Monthly U	Ipdate: Actuals	
SHF3-Allerdale B	Borough Council-2024	
	e-1-Baseline V5	
	e: 15 January 2025	
All fields must be completed to save the form. If you have incomplete figures at the time Updates cannot be edited after the due date	of 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	=
ermal: 31 Dec 2024		
V Finance Actuals		
Total Grant Received		
£24,856		
'Grant Capital Spend 👩	*Grant A&A Spend	
£2,344	£4,555	
Co-funding total spend 💿	* Combined A&A spend O	
E345	£345	
*Co-funding Capital Spend 0		
E44		
Combined Capital Spend 🕘		
£345		
v Homes Actuals		
Total homes to be treated (from Baseline)	*Homes Validated (KPI)	
70,000	2,000	1
ERROR: THE TOTAL NUMBER OF HOMES TO BE TREATED HAS BEEN EXCEEDED BY TH	6	

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.

HF3-Allerdale Borough Council-2024	
Monthly Upda	ate: Forecast
SHF3-Allerdale Boro	ough Council-2024
ALD-Phase-1-	
Update Due: 15	January 2025
Updates cannot be edited after the due date	*Forecast End Date
1 Feb 2025	28 Feb 2025
omme: 31 Det 2004	
 Finance Forecast 	
Grant Capital Spend 📵	*Grant A&A Spend 🕤
	*Combined A&A spend 🔘
*Co-funding total spend @	
	Combined Califal Spend
*Co-funding Capital Spend	*Combined Capital Spend D
*Co-funding Capital Spend . @	-Combined Capital Spend
Confunding Capital Spend. ●	-Combined Capital Spend D
*Co-funding Capital Spend . @	-Combined Capital Spend
Confunding Capital Spend Confunding Capital Spend Homes Forecast: Homes identified suitable for retrofit:	-Combined Capital Spend
Confunding Capital Spend O Homes Forecast:	-Combined Capital Spend

33. Navigate back to Monthly Updates

Navigate back to Monthly Updates

Energy Security & Net Zaro	rrm Homes: Grant Recipient Portal	Welcome, Jane Doe Allerdale Borough Council
Home Baselines Monthly Reporting	Measures ~ Payments Fraud & Risks Technical Support Logos	*
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 your update later. Updates cannot be edited after the	have incomplete figures at the time of creating the first draft then enter 0 or dummy text/dates for the	at data and return to finish
	have incomplete figures at the time of creating the first draft then enter 0 or dummy text/dates for the	at data and return to finish
your update later. Updates cannot be edited after the	i have incomplete figures at the time of creating the first draft then enter 0 or dummy text/dates for the or due date	at data and return to finish
your update later. Updates cannot be edited after the Start of Reporting Period	i have incomplete figures at the time of creating the first draft then enter () or durnmy text) dates for the is due date End of Reporting Period	
your update later. Updates cannot be edited after the Start of Reporting Period 1 Nev 2024	i have incomplete figures at the time of creating the first draft then enter () or durnmy text) dates for the is due date End of Reporting Period	
your update later. Updates cannot be edited after the Start of Reporting Period 1 Nov 2024 	there incomplete figures at the time of creating the first draft then enter 0 or dummy text/dates for the e due date End of Reporting Period End of Reporting Period 30 Nov 2024	
your update later. Updates cannot be edited after the Start of Reporting Period 1 Nev 2024 Summary Details "Date of Update 17 Dec 2024 "Homes Annouched ©	Have incomplete figures at the time of creating the first draft then enter 0 or dummy text/dates for the e due date End of Reporting Period Building Phase RAG Rating C Red Amber	8
your update later. Updates cannot be edited after the Start of Reporting Period 1 Nev 2024 Summary Details "Date of Update 17 Dec 2024 "Homes Annouched ©	Have incomplete figures at the time of creating the first draft then enter 0 or dummy text/dates for the e due date End of Reporting Period Building Phase RAG Rating C Red Amber	8
your update later. Updates cannot be edited after the Start of Reporting Period 1 Nev 2024 Summary Details "Date of Update 17 Dec 2024 "Homes Annouched ©	Have incomplete figures at the time of creating the first draft then enter 0 or dummy text/dates for the e due date End of Reporting Period Building Phase RAG Rating C Red Amber	8
your update later. Updates cannot be edited after the Start of Reporting Period 1 Nev 2024 Summary Details "Date of Update 17 Dec 2024 "Homes Annouched ©	there incomplete figures at the time of creating the first draft then enter 0 or dummy text/dates for the e due date End of Reporting Period End of Reporting Period Phase RAG Rating	8

34. Edit Monthly Updates Report

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

January monthly upda	te is due in 29 days, on	the	15 January 2025			
Open Updates						
Date of Update Baseline Ve	rsion					
	Baseline V2 edit update					
17 December 2024 ALD-Award I	And and an other Designation of the local division of the local di					
17 December 2024 ALD-Award	baseline voli eun opcore	~				
17 December 2024 ALD-Award	asseme va europoord		Croate New Monthly Update			
17 December 2024 ALD-Award I	assence val cuir apoloto	1	Create New Monthly Update	1		
17 December 2024 ALD-Sward	abenne vo		Create New Monthly Update	1		
 Closed Updates 	accente val. cun uponte	1	Create New Monthly Update	1		
	oopenne vo		Create New Monthly Update	I	Reop	m report update
	oosenne x3 i suin upooro		Create New Monthly Update	1	Reop	m report update
✓ Oosed Updates	 Baseline Version 		Create New Monthly Update	Reporting Period End	Reope	en report update ~
 Closed Updates 4 of 4 items - 0 items selected 		,		Reporting Period End 30 Sept 2024		
 Closed Updates 4 of 4 items - 0 items selected Update Reference 	 Baseline Version 		Reporting Period Start	Provide and the second second	Status	
Closed Updates 4 of 4 items - 0 items selected Update Reference PUP-00003	 Baseline Version ALD-Phase-1-Baseline V6 	÷	Reporting Period Start 1 Sept 2024	30 Sept 2024	Status Closed	

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.

January monthly upua	ate is due in 29 days, or	the 15 January 2025	Click "	edit ı	Jbq
Open Updates					
Date of Update Baseline W	and an				
	Baseline V2 edit update				
17 December 2024 ALD-Award	and the owner of the owner owner				
at become a second property of					
		Create New Monthly Upda	rte -		
✓ Closed Updates		Create New Monthly Upd	Re	Reop	en report update
		Croste New Monthly Upd:	76 	Reop	en report update
✓ Closed Updates		Create New Manthis Upd	Ke Reporting Period End	Status	en report update
✓ Closed Updates 4 of 4 items +0 items selected		1.8	-		
 Closed Updates 4 of 4 items - 0 items selected Update Reference 	 Usseline Version 	✓ Reporting Period Start	Reporting Period End	Status	
Closed Updates A of 4 items - 0 items selected Update Reference PUP-00003	Usseline Version ALD-Phase 3-Baseline V4	 Reporting Period Start 1 Sept 2024 	Reporting Period End 30 Sept 2024	Status Closed	

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

Depertment for Energy Security & Net Zero	Varm Homes: Grant Recipier الر	Nuneaton and Ba Borough
Home Baselines Monthly Reporting -	Properties & Measures	Technical Support Logout
	Annotational Annotational Constants	
WH:LG-Nuneaton and	Bedworth Borough Council-20	24
Properties with Measures Insta	lled	
0 of 0 items - 0 items selected		Q. Search this list_
Property Address	✓ Total cost of all measured.	res
	No items to display.	
	Check Details for chosen Property Record	

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.

Department for Energy Security & Net Zero	rm Homes: Grant Recipie	nt Portal	Welcome, Salesforce Damo User Nuneaton and Bedworth Borough Council
Home Baselines Monthly Reporting ~	Properties & Measures A Reyments Flaud & Risks	Technical Support Logout	
	Sector consectors.		
WH:LG-Nuneaton and Be	dworth Borough Council-20)24	
	à		
Properties with Measures Installed			
0 of 0 items - 0 items selected		Q. Search this list]
	✓ Total cost of all measurements	L]
0 of 0 items - 0 items selected		L	×
0 of 0 items - 0 items selected	✓ Total cost of all measu No items to display.	L	
0 of 0 items - 0 items selected	✓ Total cost of all measurements	L	
0 of 0 items - 0 items selected	✓ Total cost of all measu No items to display.	L	×.
0 of 0 items - 0 items selected	✓ Total cost of all measu No items to display.	L	· ·

39. Click "Address Lookup"

To begin the process, click "Address Lookup".

Lipotate Messuve Costs	Home Baselines Monthly Reporting ~	Properties & Measures A Payments Funding and Measure Details	Praud & Risks Technical Support	Logout
Properties with Measures Installed O of 0 items = 0 items selected Property Address V Total cost of all measures V	WH:LG-Nuneaton and Be	igh Co	uncil-2024	
Property Address v Total cost of all measures v	Properties with Measures Installed	Update Measure Costs		
]
requirems to display.	Property Address	. Dave		~
		rvo icems to displa	9	

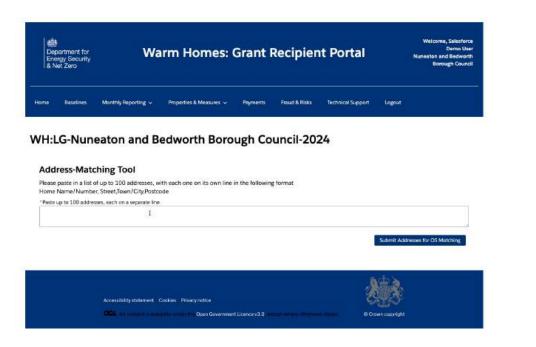
40. Fill here

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.

& Net Zero		Banaugh Council
Home Baselines Mon	htly Reporting - Properties & Measures - Reyments Fraud & Ricks Technics	al Support Logout
WH:LG-Nuneato	on and Bedworth Borough Council-2024	
Address-Matching		
Please paste in a list of up to Home Name/Number, Stree "Paste up to 100 addresses, eac		
		Submit Addresses for OS Metching
		4.60 \$
Acce	ssibility statement. Cookes : Privacy notice	

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.

Home liaselines Monthly Reporting ~	Properties & Measures 🛩 Payments Fraud & Risks	Technical Support L	ogout.
OS Matched Addresses	edworth Borough Council-202 Indiance Survey Match and Cleanse Service and have been automatic r a match and should be rejected.		
3 of 3 items - 3 items selected	19		
Address Input	V OS Full Address	V OS Match Result	×
52 Cabinhill Road, CV10 9RN	52, CABINHILL ROAD, NUNEATON, CV10 9RN	6000	
60 Orford Rise, Galley Common, CV10 954	60, ORFORD RISE, GALLEY COMMON, NUNEATON, CV 954	¹⁰ 6000	
2 Swinnerton Heritage, Nuneaton, CV10 0AF	2, SWINNERTON HERITAGE, NUNEATON, CV10 0AF	EXACT	
			Proceed to next step

44. "Proceed to Next Step"

"Proceed to Next Step"

Home illaselines Monthly Reporting -> P	roperties & Measures 🗸 Payments Fraud & Risk:	s Technical Support Logout	
WH:LG-Nuneaton and Bed OS Matched Addresses The following addresses have been matched with the Order Please desired: any addresses that you do not consider a n	nce Survey Match and Cleanse Service and have been autom		
3 of 3 items - 3 items selected			
Address Input	v OS Full Address	v OS Match Result	~
52 Cabinhill Road, CV10 9RN	52, CABINHILL ROAD, NUNEATON, CV10 9RN	6000	
	60, ORFORD RISE, GALLEY COMMON, NUNEATON, 954	CV10 GOOD	
60 Orford Rise, Galley Common, CV10 95A			
60 Orford Rise, Galley Common, CV10 95A 2 Swinnerton Heritage, Nuneaton, CV10 0AF	2, SWINNERTON HERITAGE, NUNEATON, CV10 0A		roceed to next step

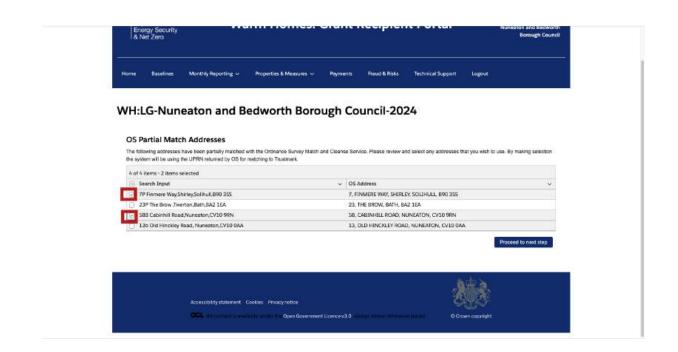
45. OS Partial Match Addresses

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.

WH:LG-Nuneaton and Bedwor	th Borough Council-2024	
OS Partial Match Addresses		making selection
The following addresses have been partially matched with the Ordnan the system will be using the UPRN returned by QS for metching to Tru	ce Survey Match and Cleanse Service. Please review and select any addresses that you wish to use. By almark,	making selection
4 of 4 items - 1 item selected		
Search Input	✓ OS Address	~
7P Finmere Way, Shirley, Solihull, B90 355	7, FINMERE WAY, SHIRLEY, SOLIHULL, B90 355	
23P The Brow ,Twerton,Bath,BA2 1EA	23, THE BROW, BATH, BA2 1EA	
588 Cabinhill Road, Nuneaton, CV10 9RN	58, CABINHILL ROAD, NUNEATON, CV10 9RN	
13b Old Hinckley Road, Nuneston, CV10 0AA	13, OLD HINCKLEY ROAD, NUNEATON, CV10 GAA	
		ed to next step

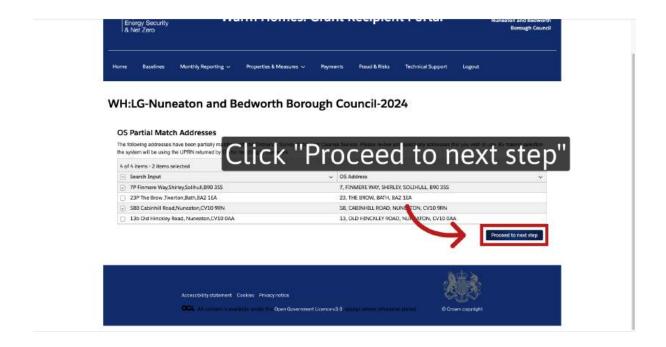
46. OS Partial Match Addresses

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.

Home Baselines Monthly Reporting - Properties	& Measures	gout
MULIC Numerican and Deduce	th Derewsh Coursell 202/	
WH:LG-Nuneaton and Bedwor	th Borough Council-2024	
OS Unmatched Addresses		
	Survey Match and Cleanse Service and therefore ne UPRN is available to match with the with a UPRN, Any addresses that do not have a match will be rejected.	TrustMark Data service. In order to
A of A items		
Address Input	 OS Match Result 	v.
16 Bridge Terrace, Keswick, CA12 SEQ	NO MATCH	
19 Lorton Road, Cockermouth, CA13 0EG	NO MATCH	
52 Sycamore Road, Nuneaton, CV10 9LN	NO MATCH	
88 Pinewood Court, Nuneaton, CV10 2FG	NO MATCH	
		CONTRACTOR OF THE OWNER.
		Proceed to next step
	1. do	

49. Click "Proceed to next step"

Click "Proceed to next step"

OS Unmatched Addresses		
The following addresses have not been matched with the Ordnance S modify an address please renter a valid address to obtain an address	urvey Match and Cleanse Service and therefore no UPRN is available to match wi	Ith the TrustMark Data service. In order to
moonly an address please renter a weld address to obtain an address A of 4 items	with a UPHN. Any addresses that do not have a match will be rejected.	
Address Input	 OS Match Result 	с.
16 Bridge Terrace, Keswick, CA12 SEQ	NO MATCH	-02.5
19 Lorton Road, Cockermouth, CA13 0EG	NO MATCH	
52 Sycamore Road, Nuneaton, CV10 9LN	NO MATCH	
88 Pinewood Court, Nuneaton, CV10 2FG	NO MATCH	
		Proceed to next step

50. Click "Finish"

Complete the process



51. Click "Receive Trustmark Data"

Select the Receive Trustmark Data option.

Department for Energy Security & Net Zero	Warm Homes: Grant Recipient Por	Welcome, Salectorce Demo User Nuneaton and Bedworth Borough Council
Home Baselines Monthly Report	ling 🗸 Properties & Measures A Payments Fraud & Risks Technical	Support Logout
	Funding and Measure Details	
WH:LG-Nuneaton ar	nd Berger Future Data	
While-Nulleaton a		
Address-Matching Tool	Update Measure Costs	
옷이 여러 걸렸던 것이 앉았는 것이 잘 못했을까?	resses, with each one on its own line in the following format	
Home Name/Number, Street,Town/Ci	ty.Postcode	
	and the second se	
*Paste up to 100 addresses, each on a seps	arate line	
*Paste up to 100 addresses, each on a seps	arate line	9 Ø
	srate line	
*Paste up to 100 addresses, each on a seps	srahe line	9 Ø
*Paste up to 100 addresses, each on a seps	arate line	
*Paste up to 100 addresses, each on a seps	arate line	
* Paste up to 100 addresses, each on a seps	srate line	
o up to 100 addresses, each on a seps to fos flos. Accossibility sta	araba line Anment Cookves Privacy ruttice	

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.

WH:LG-Nuneaton	and Bedworth Borough	n Council-2024	
7 of 7 items.			
Short address	 Measure Type 	Date of Completing Installation	Trustmark UMR v
52 Cabimhill Road, CV10 9RN	Cavity wall insulation (0.027)	6 Dec 2024	P19292KRWL
60 Orford Rise, CV10 954	Cavity wall insulation (0.027)	6 Dec 2024	P192908MKH
7 Firmere Way, 890 3SS	Cavity wall insulation (0.027)	20 Nov 2024	P18833UP2V
7 Finmere Way, 890 355	Window glazing - improved double glazing	13 Nov 2024	P18771DLKP
7 Firamere Way, 890 355	First time central heating (FTCH)	8 Mar 2024	P14574CD8E
7 Finmere Way, 890 355	Programmer and room thermostat	7 Mar 2024	P1457467FT
7 Finmere Way, 890 355	Loft insulation where there is less than or equal to 100mm pre-existing insulation	6 Mar 2024	P14574D3UL
Accestibili	ystatement Cookies Philoscynollice		Add codes to Trustmark Data

53. Click "Add costs to Trustmark Data"

proceed to the next step

7 of 7 terms Short address Measure Type Date of Completing Installation Trustmark UMR S2 Cabinhill Road, CV10 9RN Cevity wall insulation (0.027) 6 Dec 2026 P19292KRWL 60 Orford Rise, CV10 9SA Cevity wall insulation (0.027) 6 Dec 2026 P192500MCH 7 Inimete Way, IB90 355 C D C Insurant C Internet Way, IB90 355 C D C Internet Way, IB90 355 C D C Internet C Inte	2KRWL XSMKH
60 Orford Rise, CV10 95A Cavity wall insulation (0.027) 6 Dec 2024 P192606MKH	ХЕМКН
7 Firmere Way, 090 355	
	at manual (
7 Romer Wy 180 355 Click "Add costs to Trustman	stmark l
A HERE WAY, 590 333	
7 Finmere Way, 890 355 Programmer and room thermostat 7 Mar 2024 P1457467FT	467FT
7 Finmere Way, 890 355 Loft insulation where there is less than or equal to 100mm pre-existing insulation 6 Mar 2024 P14574D3UL	D3U
Add costs to Trustman	
Add costs to inustments	[]

54. Add costs to Trustmark Data"

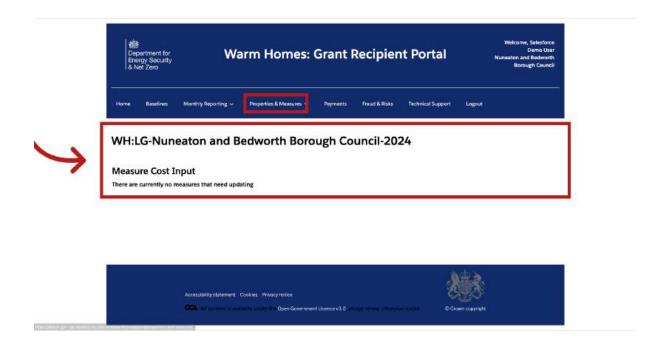
Now add "cost of single measure" against the property data and select "next".

WH:LG-Nuneaton and Bedworth Borough Council-2024

7 FINMERE WAY, SHIRLEY, SOLIHULL, , 890 355	
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	
1	
7 FINMERE WAY, SHIRLEY, SOLDHULL, , 890 355	
Measure Type: Programmer and room thermostat	
Date of Completion: 7 March 2024	
Trustmark UMR: P1457467FT	
Total Cost of Single Measure	
7 FINMERE WAY, SHIRLEY, SOLDHULL, , 890 355	
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, , 890 355	
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.

entropartment for Energy Security & Net Zero	Wai	rm Homes: (Grant F	Recipier	it Portal		Welcome, Salesforce Darno User Nuneaton and Bedworth Borough Council
Home Baselines WH:LG-Nune Measure Cost In There are currently no me	put	Retrieve Trustmark Data	1.1.1.2	Praud & Risks	Technical Support	Lagout	
					1		

© Crown copyright

57. View Properties with Measures Installed

Click "Check Details for chosen Property Record".

Department for Energy Security & Net Zero	omes: Grant	Recipien	it Portal		Welcome, Salesforce Demo User Nuneaton and Bedworth Borough Council
e Baselines Monthly Reporting ~ Properties &	i Measures 🛩 Payments	Fraud & Risks	Technical Support	Logout	
H:LG-Nuneaton and Bedwort	th Borough Co	ouncil-202	24		
2 contract of the second s					
3 of 3 items - 0 items selected			Q. Search this list		
3 of 3 items - 0 items selected Property Address		al cost of all measure			•
3 of 3 items - 0 items selected Property Address 50 ORFORD RISE, GALLEY COMMON, NUMERTON, , CV10 954		al cost of all measure			E467.00
3 of 3 items - 0 items selected Property Address		al cost of all measure			
60 GREORD RISE, GALLEY COMMON, NUMEATON, , CV10 954 52 CABINHILL ROAD, NUNEATON, , CV10 9RN		•			E467.00 E3,456.00

58. Click "Return to Property List"

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

ICK Neturn	to Property List"	
- EPC Data		
EPC Rating	EPC Inspection Date	
Potential EPC Rating		-
Measures Installed		
Trustmark UMR		
P19292KRWL		
Measure Type Cavity wall insulation (0.027)		
Measure Category		
Cavity Wall Insulation		
Date of Completing Installation		
6 Dec 2024		
		Return to 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.

Department for Energy Security & Net Zero	Warm Homes: Gra	nt Recipient Portal	Welcome, John Smith Allerdale Borough Council
Home Baselines Monthly Reportin	g 🗸 Properties & Measures 🗸 Poym	nents Praud & Risks Technical Support	Logent
January monthly update is d	ue in 30 days, on the 15 Januar	ry 2025	
SHF3-Allerdale Bore	ough Council-2024		
Total Grant Amount Awarded £3,516,850	Total Grant Amount Received £18,500	Total Measures Installed/ Basellined Measures 23/6,409	Project RAG Green
ward Summary			
Application Details			
👳 Grant Recipient Details			
Applicant Organisation		Grant Recipient Type	
Applicatic ofganoacion			
Allerdale Borough Council		Local Authority	

61. Grant Recipient

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

Department for Energy Security & Net Zero	Warm Homes: Gra	nt Recipient Portal	Welcome, John Smith Allerdale Borough Council
Home Baselines Monthly Reportin	ig ← Properties & Measures ← Pay	ments Fraud & Risks Technical Support	Grant
January monthly update is d	lue in 30 days, on the 15 Janua	ry 2025	
SHF3-Allerdale Bor	ough Council-2024		
Total Grant Amount Awarded £3,516,850	Total Grant Amount Received £18,500	Total Measures Installed/ Baselined Measures 23/6,409	Project RAG Green
		BaseEned Measures	
£3,516,850		BaseEned Measures	
£3,516,850 ward Summary		BaseEned Measures	

62. Click "Payments"in the Portal

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

Department for Energy Security & Net Zero	Warm Homes: Gra	nt Recipient Portal	Weicome, John Smith Allerdale Borough Council
Home Baselines Monthly Reporting	g 🗸 Properties & Measures 🗸 🛛 Payr	ments	t Logout
January monthly update is d	ue in 30 days, on the 15 Janua	ry 2025	
SHF3-Allerdale Bore	ough Council-2024	Click "Pay	ments"
SHF3-Allerdale Bord Total Grant Amount Awarded £3,516,850	Dugh Council-202	Total Measures Installed/ Baselined Measures 23/6,409	ments" Green
Total Grant Amount Awarded	Total Grant Amount Received	Total Measures Installed/ Baselined Measures	Project RAG
Total Grant Amount Awarded £3,516,850	Total Grant Amount Received	Total Measures Installed/ Baselined Measures	Project RAG
Total Grant Amount Awarded £3,516,850 ward Summary	Total Grant Amount Received	Total Measures Installed/ Baselined Measures	Project RAG

63. Click here

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

	& Net Zero							
но	me Baselines	Monthly Reporting 🐱	Properties & Measures 🗸	Payments	Fraud & Risks	Technical Support	Logout	
SH	IF3-Allerda	le Borough	Council-2024					
	Payment History							_
	Payments Awaiting Confin 2 of 2 items - 1 item set	ected						
	Payment Reference	v Amount	 Sched £8,000.00 24/10 		v Disbur	lement Date	 Payment Received 	
			\$6,500.00 16/12	/2024, 12:00	16/12/	2024, 12:00		
-			Select Record abor	ve and Confirm F	ayment Received			
Davmo	nte A	waiti	nσ					
Payme		waiti	<u>118</u> - mann	of Dete	~ Disburse	ment Date	Payment Received	
Confirr	natic	n of∃	Receir	ot		024, 12:00	~	
Comm	natic		neeeip		30/10/2	024, 12:00	*	
				_				
		Accessibility statement	ookies Privacy notice			3		

64. Select Record

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

Home Baselines Monthly Report	ng 🤟 Properties & Measu	res 🗸 Paymants	Fraud & Ris	ks Technical Supp	piro	Logout	
SHF3-Allerdale Boro	ugh Council-2	026					
SHFS-Alleruale Boro	ugn council-2	024					
Select Re	cord						
Select Ke	Lora						
Payment Reference	mount v	Scheduled Date	~ 0	isbursement Date	U.	Payment Received	
0	\$8,000.00	24/10/2024, 12:00					
	\$6,500.00	0 16/12/2024, 12:00	1	6/12/2024, 12:00			
	Select Re	cord above and Confirm F	ayment Receiv	ed			
2 of 2 items							
Payment Reference - Ame		Scheduled Date 16/12/2024, 12:00		bursement Date		Payment Received	1
	£3,500.00	16/12/2024, 12:00		12/2024, 12:00		~	
	15,500.00		30/	10/2024, 12:00		×	

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.

Home Baselines Mr	onthly Reporting 🐱	Properties & Measures 🗸	Payments	Fraud & Risks Technical Su	pport Logo	
Provine Bosernes an	and reporting a	riopenies a measures 🗸	Payments	naug a Alaks Trechnical Su	phone codes	
CUED Allowdate	Denough	Council 202/				
Click"	Sele	ct Rec	ord	ahove	and	-1
Confir	m Pa	vmen	t Re	ceived		
2 of 2 horre - 1 have calle to Payment Reference	× Amount		fulled Date	v Disbursement Date		nent Received
	Amount	£8,000.00 24/3		V Disbursement Date	• Раут	
		\$6,500.00 16/1	2/2024, 12:00	16/12/2024, 12:00		
		Select Record ab	ove and Confirm Paym	ent Received		
2 of 2 items						
2 of 2 items Payment Reference	~ Amount	✓ Schedul tran on 16(1)(Disbursement Date 16 (12) (2024, 13:00 	1122307301	ent Received
	~ Amount	 Schedul £500.00 16/12/7 £3,500.00 		 Disbursement Date 16/12/2024, 12:00 30/10/2024, 12:00 	v Paym	ent Received
	~ Amount	E500.00 16/12/3		16/12/2024, 12:00	~	ent Received

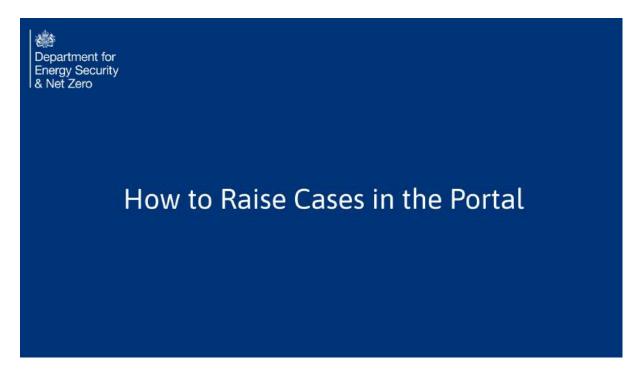
66. Validate Confirmed Payment in Portal

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

aymentin	story								
	Confirmation of Receip	t.							
1 of 1 item - 0 ite Payment Re		Amount		Scheduled Date	~	Disbursement Date	v	Payment Received	
0				24/10/2024, 12:00					
3 of 3 items Payment Referen	nce v A	mount		Scheduled Date		Disbursement Date		Payment Received	-
	164	in second c				16/12/2024, 12:00			
			£500.00	16/12/2024, 12:00		10/12/2024, 12:00		4	
				16/12/2024, 12:00 16/12/2024, 12:00		16/12/2024, 12:00		~	

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.

Department for Energy Security & Net Zero	Warm Homes: 0	Grant Recipient Portal	Welcome, John Smith Allerdale Borough Council
Home Baselines Mont	thly Reporting - Properties & Measures -	Payments Fraud & Risks Technical Support	Logout
January monthly upd	date is due in 30 days, on the 15 Ja	anuary 2025	
SHF3-Allerdale	e Borough Council-202	24	
Total Grant Amount Awar £3,516,850	rded Total Grant Amount Received £18,500	Total Measures Installed/ Baselined Measures 23/6,409	Project RAG Green
ward Summary			
Application Details			
Application Details			
•••		Grant Recipient Type	

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.

Department for Energy Security & Net Zero	Warm Homes: Gra	int Recipient Portal	Welcome, John Smith Allerdale Borough Council
Home Baselines Monthly Reporti	ng v Properties & Measures v Pay	ments Praud & Risks Technical Suppor	Grant R
January monthly update is o	due in 30 days, on the 15 Janua	ry 2025	
SHE2-Allerdale Boy	ough Council-2024		
Shirs-Alleruale boi	ough council 2024		
Total Grant Amount Awarded £3,516,850	Total Grant Arrount Received £18,500	Total Measures Installed/ Baselined Measures 23/6,409	Project RAG Green
Total Grant Amount Awarded	Total Grant Amount Received	Baselined Measures	
Total Grant Amount Awarded £3,516,850	Total Grant Amount Received	Baselined Measures	
Total Grant Amount Awarded £3,516,850 ward Summary	Total Grant Amount Received	Baselined Measures	
Total Grant Amount Awardsd £3,516,850 ward Summary Application Details	Total Grant Amount Received	Baselined Measures	

71. Click "Technical Support"

To raise an I.T. support case, click to navigate to the "Technical Support" tab.

e	Baselines	Monthly Reporting \sim	Properties & Measures 🗸 🤊 Paym	ents Fraud & Risks Technical Support	1 🦛
nua	ary month	ly update is due i	in 30 days, on the 15 Januar		echnical S
					connear o
HF	3-Alle	rdale Borou	gh Council-2024		
	53-Aller otal Grant Amo £3,516	ount Awarded	gh Council-2024 Total Grant Amount Received £24,178	Total Measures Installed/ Baselined Measures	Project RAG Green

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.

a 🖬 desna	-gmqa.sandbox my site.com	Avenuinomesportal/en					
	Department Energy Sec & Net Zero		War	m Homes	: Grant Recipient F	Portal Weicome, John Smit Atterdate Borough Count	
	Home Basely Help and Sup		Reporting ~	Properties & Measures .~	 Payments Praud & Risks Ter 	chnical Support Logout	
	placeholder.help@o	digitalmodus.co	n and access is: m For other qui	sues as well as permis estions relating to the	operation of the scheme please conta		
	Support Case	ş			Support Case Details		
	3 of 3 items • 1 ite	m selected	Q. 56	santh this list.	Case Number 00001022	Status Closed	
	3 of 3 items - 1 ite Ref No. ~		1				
	Ref No. ~	Subject v	Created D ~	Status ~	00001022 Subject	Closed Date / Time Opened	
	Ref No. ~	Subject v Cannot login	Created D • 16/12/2024, 16:19 16/12/2024,	Status v Closed	00001022 Subject Cannot login Description	Closed Date / Time Opened 16/12/2024, 16:19 Date / Time Closed	
	Ref No. ~	Subject v Cannot login Cannot login Login problems	Created D> 16/12/2024, 16/19 16/12/2024, 14:05 12/12/2024,	Status V Closed New Escalated	00001022 Subject Cannot login Description	Closed Date / Time Opened 16/12/2024, 16:19 Date / Time Closed	

73. Support Case Details

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

 (b): 17-17-sidentale Decesaria Control and Stassort 4 4<!--</th--><th>👷 Wy Gundes) Globbe 🔹 👘</th><th></th><th>ង</th><th>a 0 1 7</th>	👷 Wy Gundes) Globbe 🔹 👘		ង	a 0 1 7
Department for Energy Security & Net Zaro	Warm Homes:	: Grant Recipient Porta	Walcome, John Smith Allerdale Borough Council	
Home Baselines Monthly F	Reporting 🗸 🛛 Properties & Measures 🗸	Payments Fraud & Risks Technical Sup	oport Logeut	
		sions (such as accessing reports) please contac operation of the scheme please contact Support Case Details	t the technical support team at	
3 of 3 items + 1 item selected	Q. Search this list	Case Number	Status	
Ref No. v Subject v		00001018	New	
O 00001022 Cannot login	16/12/2024, 16:19 Closed	Subject Cannot login	Date / Time Opened 16/12/2024, 14:05	
00001018 Cannot legin	16/12/2024, 14:05 New	Description Cannot login	Date / Time Closed	
Q 00001017 Login problems	12/12/2024, Escalated			
B	reate Support case			

74. Click "Create Support case"

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

De 1947 - Mariada Dormach Co. x 💌 Dassant 🛛 x 🧐 My Dainbail Daithe x 📑			
← → ♂ % deens-gm-qa.sandbex.my.ste.com//wambenrespons/wapport			🛪 🗆 🛈 L 🕶 🚳 E
Bepartment for Energy Security & Net Zaro	nes: Grant Recipient Portal	Walcome, John Smith Allerdale Borough Council	
Home Baselines Monthly Reporting - Properties & Mean	sures ∨ Payments Flaud & Risks Technical Support	Logeut	
Help and Support			
For technical support including login and access issues as well as p placeholder help@digitalmodus.com For other questions relating		technical support team at	
Support Cases	Support Case Details		
3 of 3 items • 1 item selected Q Search this list	Case Number 00001017	Status Escalated	
Ref No. v Subject v Created D., v Status v	Subject	Date / Time Opened	
O0001022 Cannot fire 16(12)2024. Stored	Lingity and there	13/12/2024 20:41	
	reate Support	case"	
 00001017 Login problems ^{12/12/2024}, Escalated 			
Crewle Support case			
Open Monthly Update Requests	No Record Selected		

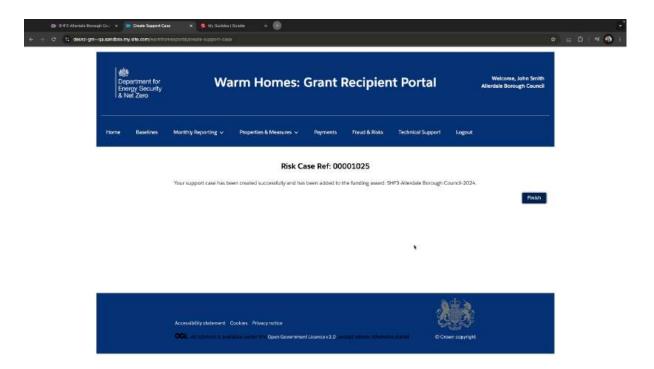
75. Creating a Support Case

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

Department for Energy Security & Net Zero	Welcome, John Smith Attendale Borough Council
Home Baselines	Munitrily Reporting 🗸 Properties & Measures 🗸 Payments Fisuid & Risks Technical Support Logout
Di contra di	
Please enter details of help "Help or Support Summary Cannot login	or support you require relating to this award. For example technical support including login and access issues as well as permissions (such as accessing reports) etc.
"Help or Support Summary	
"Help or Support Summary Cannot login	

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.

		**	* Sty Dutities ()	aute e (Ð.								
: 🕄 desna-gmga.s	sandokx my site o	any/warminomesportal)									Ĥ	ц О I	1
	Departme Energy Se & Not Zen	ourity	Wai	rm Hon	nes: C	Grant	Recipier	nt Portal		Welcome, John Smit Allerdate Borough Counc			
	tome Bas	eines Monthi	y Reporting 🗸	Properties & Mer	asures 🗸	Payments	Freud & Risks	Technical Support	Lognut				
		en anna anna anna anna anna anna anna a									-		
Hel	lp and Su	pport											
								please contact the t	echnical su	pport team at			
		port including lo @digitalmodus.c							echnical su	pport team at			
place		@digitalmodus.c				eration of the		contact	echnical su	pport team at			
place Su	eholder help	@digitalmodus.c	om For other qu			eration of the	scheme please	contact	echnical su	pport team at			
place Su	eholder help upport Cas 4 of 4 items + 0	@digitalmodus.c @S hems selected	om For other qu	estions relating	g to the ope	eration of the	scheme please	contact	echnical su	pport team at			
place Su	eholder help upport Cas 4 of 4 items + 0	@digitalmodus.c @S hems selected	om For other qu	estions relating	g to the ope	eration of the	scheme please	contact	echnical su	pport team at			
place Su	eholder help upport Cas 4 of 4 items • 0 Ref No.	@digitalmodus.c æs itemsselected ✓ Subject v	om For other qu Q S • Created D • 16/12/2024,	iestions relating iearch this list	g to the ope	eration of the	scheme please	contact	echnical su	pport team at			
place Su Q	eholder help upport Cas 4 of 4 items - 0 Ref No. 2 00001025	©digitalmodus c es items selected ✓ Subject Cannot login	Created D v 16/12/2024, 16/2/ 16/12/2024,	iearch this list Status New	g to the ope	eration of the	scheme please	contact	echnical su	pport team at			

78. Grant Recipient: Raising Fraud and Error Cases

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



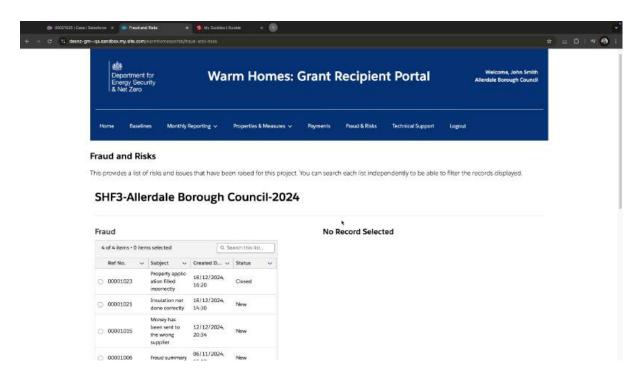
79. Click "Fraud & Risks"

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

Home Baselines Monthly Reportin	ig ∽ Properties & Measures ∽ Paym	ents Fraud & Risks	Logout
January monthly update is d	ue in 29 days, on the 15 Januar	y 2025	
SHF3-Allerdale Bor Total Grant Amount Awarded £3,516,850	ough Council-2024 Total Grant Amount Received £24,178	Total Measures Installed/ Baselined Measures 0/6.409	aud & Ris
		distant.	

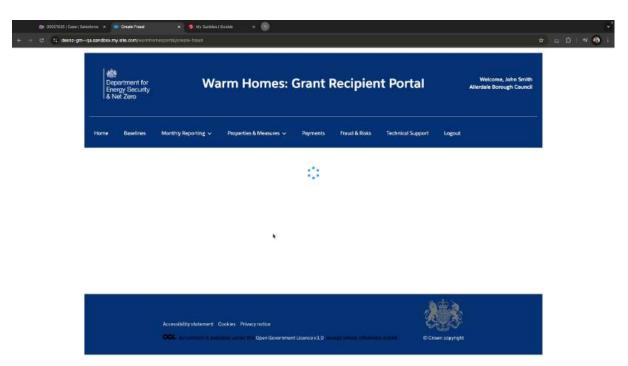
80. Fraud or Error Cases

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.



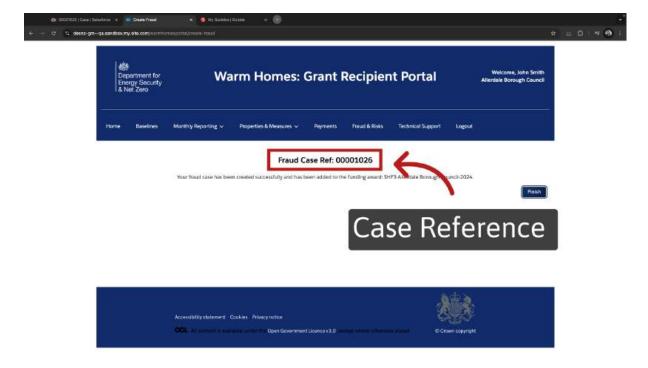
82. Add Case Details

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

Department for Energy Security & Net Zero	Wa	ırm Homes:	Grant	Recipier	nt Portal		Nelcome, John Smith dale Borough Council
Home Baselines	Monthly Reporting 🗸	Properties & Measures 🗸	Payments	Fraud & Risks	Technical Support	Lognut	
		Creat	te Fraud R	ecord			
		SHF3-Allerda	le Borough	Council-202	4		
Please enter details of ers free	ut related to this award. Th	his information will help us mon				ass there effectively	
"Summary of Risk	in related to a standard. If	is more about init step as the	erer potentia en	nenges and take op	beels account to and	en den energeen	
Measure/Installation							:
Category of Risk							
Measures not installed							ः
*Fraud Summary							2.5
Property application filled in	colrectly)
*Fraud Description							
							and the second second
							00
Comptete this Felia							
							Next

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.

Home Ba	solines Monthly i	Reporting ~ Pr	operties & Measures 🗸	Payments	Fraud & Risks	Technical Support	Logout	
Fraud and	Risks							
This provides a R	st of risks and issue	es that have been r	raised for this project	t. You can searc	n each list indep	endently to be able	to filter the records displayed.	
	llordalo Br	arough Co	uncil 202					
SUL2-VI	lierdale bo	brough co	ouncil-2024	4				
Fraud				No	ecord Select	ad.		
Flauu				NOP	lecord Select	leu		
5 of 5 items . P	Internet and a further	O Super	H. Hule Hat					
5 of 5 items · 0			th this list.					
5 of 5 items - 0 Ref No.		Created D v S	-	5				
Ref No.	Subject Property application filled	Created D V S 16/12/2024, 16:25 N	itatus 🗸	5	•			
Ref No.	Subject v Property application filled incorrectly Property application filled	Created D v S 16/12/2024, N 16/12/2024, N 16/12/2024, C 16/12/2024, C	itatus 🗸	5	•			
Ref No. 00001026 00001023	Subject Property application filled incorrectly Property application filled incorrectly Ensulation net	Created D v S 16/12/2024, N 16/12/2024, N 16/12/2024, C 16/12/2024, C 16/12/2024, N 16/12/2024, N 16/12/2024, N 16/12/2024, N	Natus v kew	5	•			

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.

(b): 0000/028 Gase Heinsforce : a 👘 Frankland Roba	🗴 🧕 Hy Dankes Daske 🔹 🕣			
e -	alfraud-and-riska			🖈 🛛 🛈 । ज 🚳 ह
	sues that have been raised for this p Borough Council-20	roject. You can search each list independently to be	able to filter the records displayed.	
Fraud		Fraud Case Details		
5 of 5 items - 1 item selected	Q. Search this list.	Case Number 00001026	Status New	
O0001026 Property app etion filled incorrectly	olic 16/12/2024, New 16:25	Summary of Risk Measure/Installation	Date / Time Opened 16/12/2024, 16:25	
O0001023 Property app ation filled incorrectly	^{bic-} 16/12/2024, Closed 16:20	Category of Risk Areas Measures not installed	Date / Time Closed	
O 00001021 Insulation n done correct		Subject Property application filled incorrectly	Outcome	
O0001035 Money has been sent to the wrong supprior	12/12/2024, New 20:34	Description Property application filled incorrectly		
O 00001006 Fraud summ	ary 06/11/2024, Now 16:10			
0	rate Fraud or Error Case			
Risk Register		No Record Selected		
3 of 3 items + D items selected	Q. Seasch this list.			

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.

Department for	Wa	arm Homes:	Grant	Recipier	nt Portal		Welcome, John Smith
Energy Security & Net Zero							
Home Baselines	Monthly Reporting 🗸	Properties & Measures 🗸	Payments	Fraud & Roky	Technical Support	Lognut	
		Create Dis	ke and Ise	sues Record	ř.		
		SHE3-Allerda					
		Sill S Allerda	ne bolougi	Council-202	4		
Please enter details of any n	isks or issues related to this a	award. This information will help				s to address the	m effectively.
	isks or issues related to this a					a to address the	m effectively.
Please enter details of any ri Risk Category	isks or issues related to this a					a to address the	m effectively.
Risk Category	isks or issues related to this a					s to address the	m effectively.
Risk Category	isks or issues related to this a					a to address the	m effectively.
Risk Cetegory	isks or issues related to this a					s to address the	m effectively.
Risk Category - None - Access Issues Asbectos	isks or issues related to this a					s to address the	m effectively.
Risk Cotegory - None Access Issues Asbestos Consumer	isks or issues related to this a					a to address the	m effectively.
Risk Cetegory 	isks or issues related to this a					s to address the	m effectively.
Risk Cetegory	isks or issues related to this a					s to address the	n effectively.
Risk Cotegory	isks or issues related to this a					s to address the	m effectively.
Risk Cottegory - None- Access issues Assestos Consumer Cost Inflation Covid-19 Ewigin Fraud	isks or issues related to this a					s to address the	m effectively
Risk Category None Access issues Access issues Consumer Cost inflation Covid-19 Eweign Fraud GDPR	iska or issues related to this a					s to address the	m effectively.
Risk Category Mone Access issues Access issues Consumar Cost Inflation Costil-19 Design Fraud SDPR Indeth & Safety	iska or issues related to this a					to address the	m effectively
Risk Cotogory - None- Access Issues Access Issues Cost Inflation Cost Inflation CostI-59 Devign Fraud GOPR Hwath & Safety New problem Other	isks or issues related to this a					s to address the	m effectively
Risk Category Access Issues Access Issues Access Issues Constitution Covid-19 Dewign Fraud CDPR Haufin & Safety New problem. Other Planning	iska or issues related to this a					s to address the	m effectively.
Risk Cotogony Access issues Access issues Constitution	isks or issues related to this a					s to address the	m effectively
Risk Category Construction Access Issues Access Issues Acbests Issues Const Inflation Convid=19 Eval Develop Fraud Confit Panning Procurement Coulty	iska or issues, related to this a					s to address the	m effectively.
Risk Cotogory	isks or issues related to this a					a to address the	m effectively

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.

		incorrectly								с D
0	00001023	Property applic- ation filled incorrectly	16/12/2024, 16:20	Closed						
0	00001021	Insulation not done correctly	16/12/2024, 14:30	New						
0	00001015	Money has been sent to the wrong supplier	12/12/2024, 20:34	New						
1.00										
Risk	k Register		06/11/2024, Fraud or Error Ca	eesth this list		No Record	1 Selected			
Risk	k Register	ms selected	Fraud or Error Ca	se learch this list.		No Record	1 Selected			
Risk	k Register of 4 items + D ker	ms selected	Fraud or Error Ca	se learch this list.]←	No Record	d Selected			
Risl	k Register of 4 items + 0 ite Ref No. ~	ms selected Case Reas v	Fraud or Error Ca Q S Created D ~ 16/12/2024,	se iearch this list]←	No Record	d Selected			
Risk	k Register of 4 items + 0 ite Ref No. ~ 00001027	ns celected Case Ress v Weather	Fraud or Error Ca Q. S Created D v 16/12/2024, 16/22/2024,	See Liearch this list Status New]←	No Record	d Selected			

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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