

# 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.

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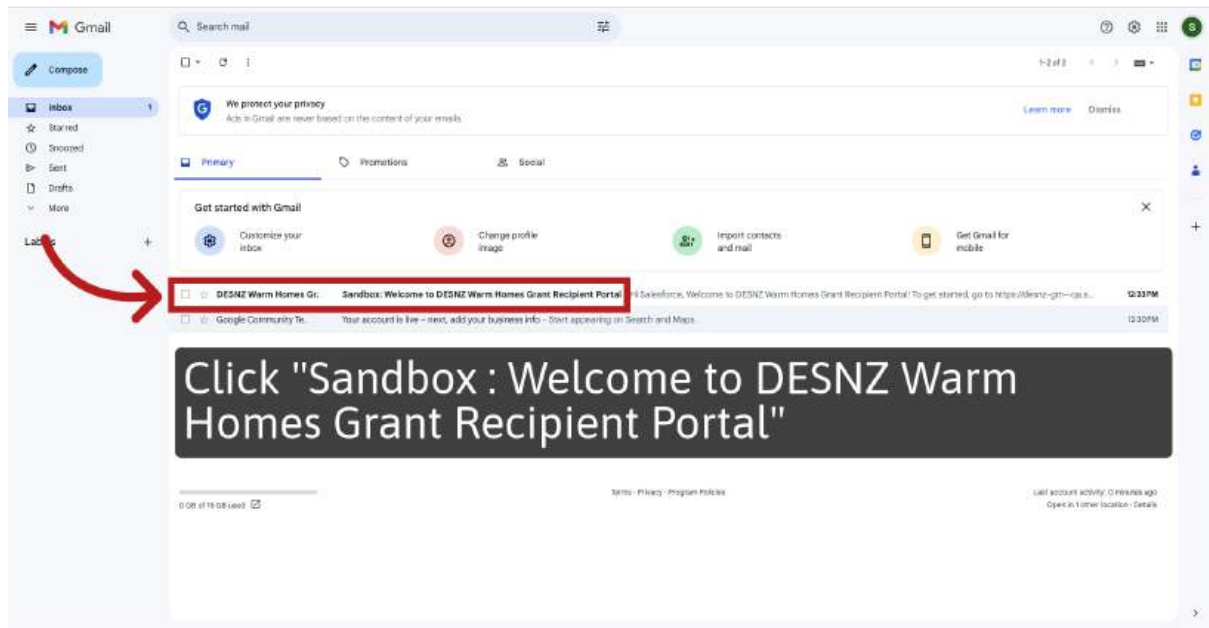
## 2. Logging into & Navigating the Grant Recipient Portal



### Logging into & Navigating the Grant Recipient Portal

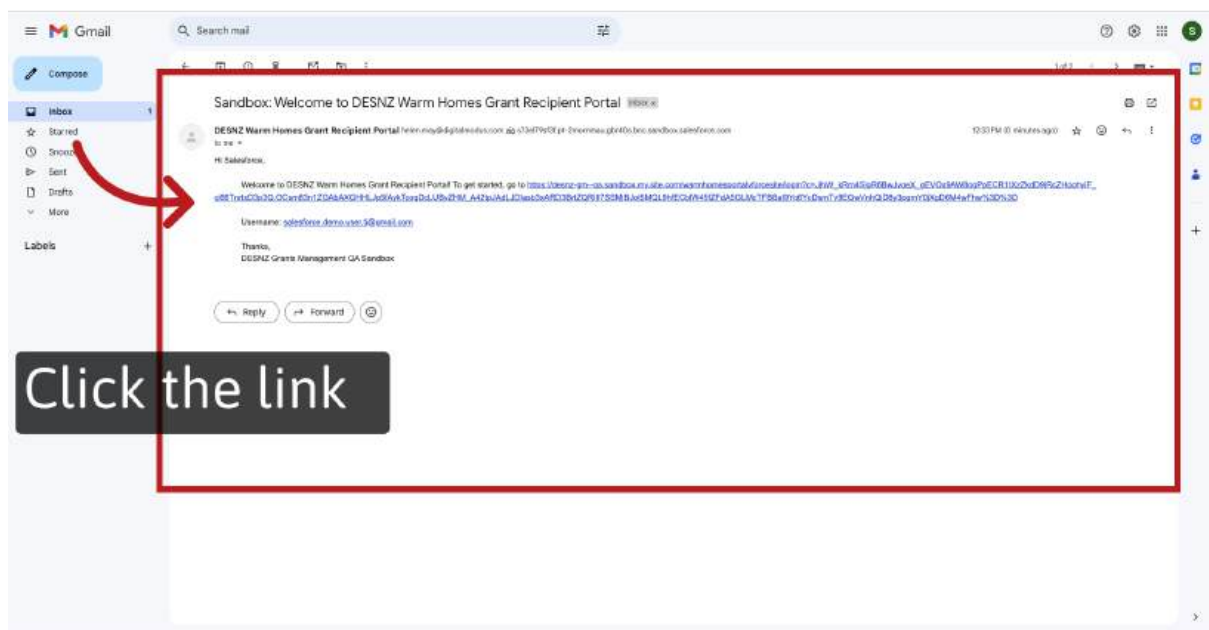
## 3. Click "Sandbox : Welcome to DESNZ Warm Homes Grant Recipient Portal"

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.



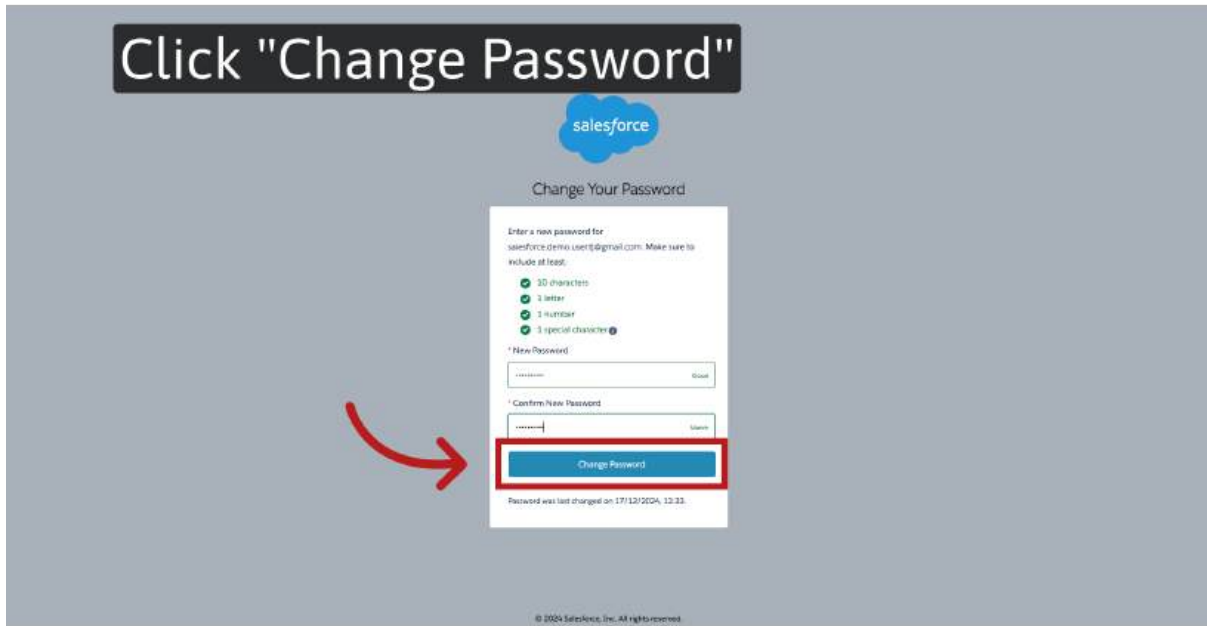
#### 4. Click the link

Navigate to the next step by clicking on the link.



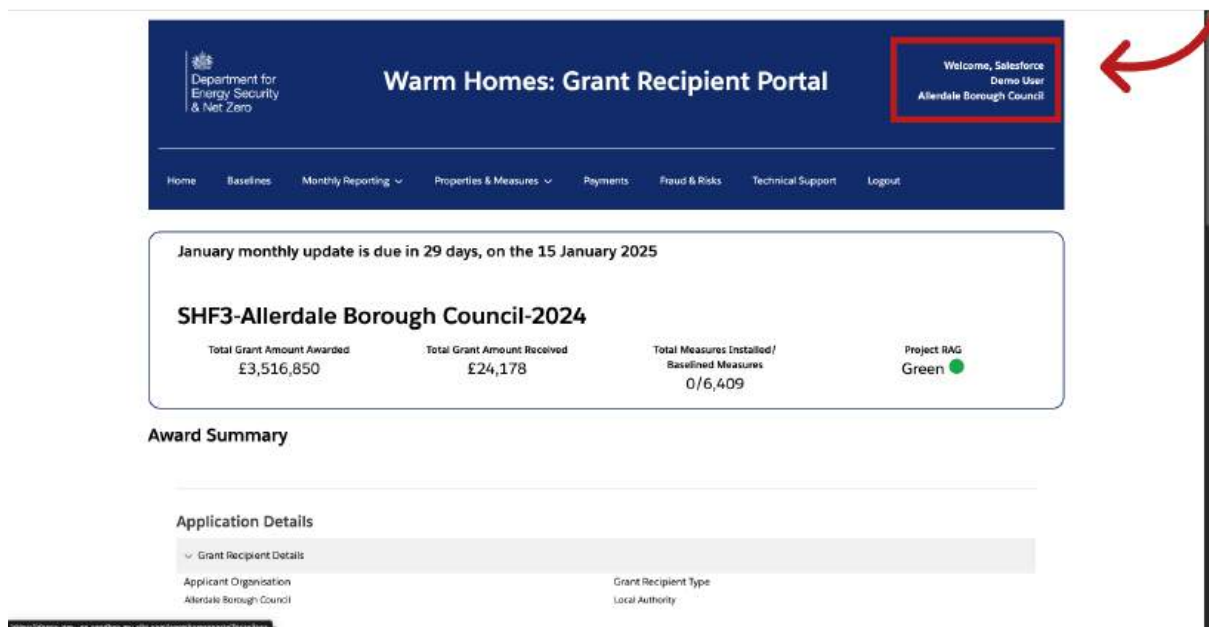
#### 5. Click "Change Password"

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.

## Home Page

Department for Energy Security & Net Zero

# Warm Homes: Grant Recipient Portal

Welcome, Salesforce Demo User  
Allerdale Borough Council

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

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

### SHF3-Allerdale Borough 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
--	--	--	----------------------

#### Award Summary

#### Application Details

Grant Recipient Details

Applicant Organisation Allerdale Borough Council	Grant Recipient Type Local Authority
---	---

## 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: Grant Recipient Portal

Welcome, Salesforce Demo User  
Allerdale Borough Council

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--	--	--	----------------------

#### Award Summary

#### Application Details

Grant Recipient Details

Applicant Organisation Allerdale Borough Council	Grant Recipient Type Local Authority
---	---

## 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: Grant Recipient Portal

Welcome, Salesforce Demo User  
Allerdale Borough Council

[Home](#)
[Baselines](#)
[Monthly Reporting](#)
[Properties & Measures](#)
[Payments](#)

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

SHF3-Allerdale Borough Council-2024

Total Grant Amount Awarded

£3,516,850

Total Grant Amount Received

£24,178

Total Measures Installed/ Baseline Measures

0/6,409

Project RAG

Green

Award Summary

Application Details

Grant Recipient Details

Applicant Organisation

Allerdale Borough Council

Grant Recipient Type

Local Authority

## 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).

Department for Energy Security & Net Zero

Warm Homes: Grant Recipient Portal

Welcome, Salesforce Demo User  
Allerdale Borough Council

[Home](#)
[Baselines](#)
[Monthly Reporting](#)
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[Payments](#)

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

SHF3-Allerdale Borough Council-2024

Total Grant Amount Awarded

£3,516,850

Total Grant Amount Received

£24,178

Total Measures Installed/ Baseline Measures

0/6,409

Project RAG

Green

Award Summary

Application Details

Grant Recipient Details

Applicant Organisation

Allerdale Borough Council

Grant Recipient Type

Local Authority

Grant Recipient Size

Medium-sized organisation

Region

North West

Project Summary

Total Homes To Be Treated

1,500

Actual Homes Treated

0

Homes To Epc C

3,654

Actual Homes To Epc C

7,902

No. Of Homes Accessing The On-Gas Grid

No. Of Homes Accessing The Off-Gas Grid

## 11. The "Baselines" Tab

Next Up is "Baselines" in the navigation bar.

# Warm Homes: Grant Recipient Portal

Welcome, Salesforce Demo User  
Allerdale Borough Council

[Home](#)
[Baselines](#)
[Monthly Reporting](#)
[Properties & Measures](#)
[Payments](#)
[Fraud & Risks](#)
[Technical Support](#)
[Logout](#)

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

## SHF3-Allerdale Borough 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
--	--	--	----------------------

### Award Summary

#### Application Details

Grant Recipient Details

Applicant Organisation  
Allerdale Borough Council

Grant Recipient Type  
Local Authority

## 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.

# Warm Homes: Grant Recipient Portal

Welcome, Salesforce Demo User  
Allerdale Borough Council

[Home](#)
[Baselines](#)
[Monthly Reporting](#)
[Properties & Measures](#)
[Payments](#)
[Fraud & Risks](#)
[Technical Support](#)
[Logout](#)

## SHF3-Allerdale Borough Council-2024

### Baseline History

10 of 10 items - 0 items selected

Baseline Version	Start Date	Status
<input type="radio"/> ALD-Phase 1-Baseline V5	1 Oct 2024	Active
<input type="radio"/> ALD-Award Baseline V3	1 Apr 2025	Active
<input type="radio"/> ALD-Phase 1-Baseline V7	1 Oct 2024	Draft
<input type="radio"/> ALD-Phase 1-Baseline V7	1 Oct 2024	Draft
<input type="radio"/> ALD-Phase 1-Baseline V1	1 Oct 2024	Historic
<input type="radio"/> ALD-Phase 1-Baseline V4	1 Oct 2024	Historic
<input type="radio"/> ALD-Phase 1-Baseline V2	1 Oct 2024	Historic
<input type="radio"/> ALD-Phase 1-Baseline V3	1 Oct 2024	Historic
<input type="radio"/> ALD-Award Baseline V2	1 Apr 2025	Historic

No Baseline Selected

## 13. Click "Monthly Reporting"

Next, is Monthly Reporting

Energy Security & Net Zero

Allerdale Borough Council

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

SHF3-Allerdale Borough Council-2024

**Click "Monthly Reporting"**

**Baseline History**

10 of 10 items - 1 item selected

Baseline Version	Start Date	Status
<input type="radio"/> ALD-Phase-1-Baseline V5	1 Oct 2024	Active
<input type="radio"/> ALD-Award Baseline V3	1 Apr 2025	Active
<input type="radio"/> ALD-Phase-1-Baseline V7	1 Oct 2024	Draft
<input type="radio"/> ALD-Phase-1-Baseline V7	1 Oct 2024	Draft
<input type="radio"/> ALD-Phase-1-Baseline V1	1 Oct 2024	Historic
<input type="radio"/> ALD-Phase-1-Baseline V4	1 Oct 2024	Historic
<input checked="" type="radio"/> ALD-Phase-1-Baseline V2	1 Oct 2024	Historic
<input type="radio"/> ALD-Phase-1-Baseline V3	1 Oct 2024	Historic
<input type="radio"/> ALD-Award Baseline V2	1 Apr 2025	Historic

**Baseline Version**

ALD-Phase-1-Baseline V2

Detail

## 14. Click "Monthly Updates"

Click on "Monthly Updates".

Energy Security & Net Zero

Allerdale Borough Council

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

SHF3-Allerdale Borough Council-2024

**Click here**

**Monthly Updates**

Monthly Actuals

Monthly Forecasts

**Baseline History**

10 of 10 items - 1 item selected

Baseline Version	Start Date	Status
<input type="radio"/> ALD-Phase-1-Baseline V5	1 Oct 2024	Active
<input type="radio"/> ALD-Award Baseline V3	1 Apr 2025	Active
<input type="radio"/> ALD-Phase-1-Baseline V7	1 Oct 2024	Draft
<input type="radio"/> ALD-Phase-1-Baseline V7	1 Oct 2024	Draft
<input type="radio"/> ALD-Phase-1-Baseline V1	1 Oct 2024	Historic
<input type="radio"/> ALD-Phase-1-Baseline V4	1 Oct 2024	Historic
<input checked="" type="radio"/> ALD-Phase-1-Baseline V2	1 Oct 2024	Historic
<input type="radio"/> ALD-Phase-1-Baseline V3	1 Oct 2024	Historic
<input type="radio"/> ALD-Award Baseline V2	1 Apr 2025	Historic

**Baseline Version**

ALD-Phase-1-Baseline V2

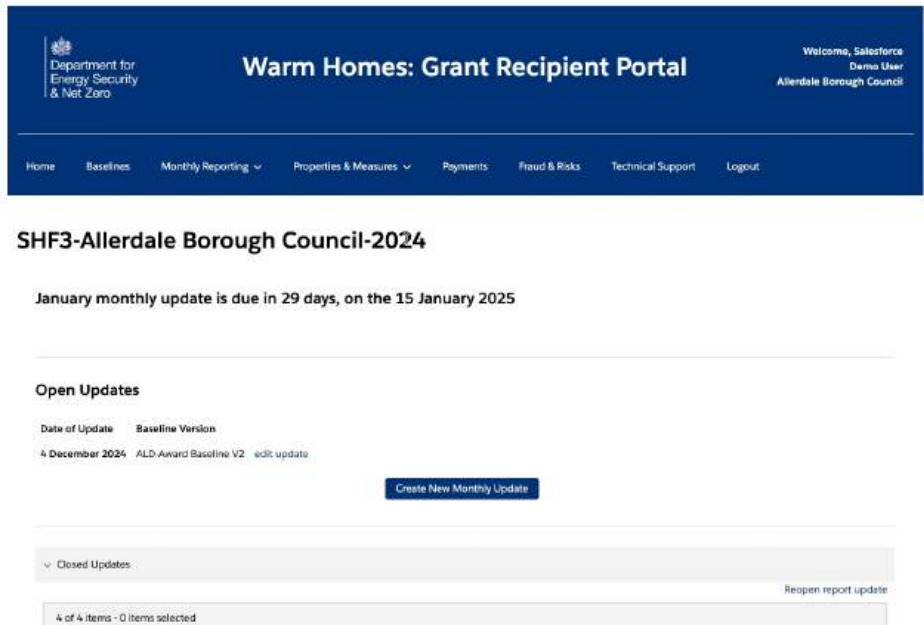
Detail

<https://share.gm-1a.com/tes.ny.uk/energymanagement/monthly-updates>

## 15. Monthly Update

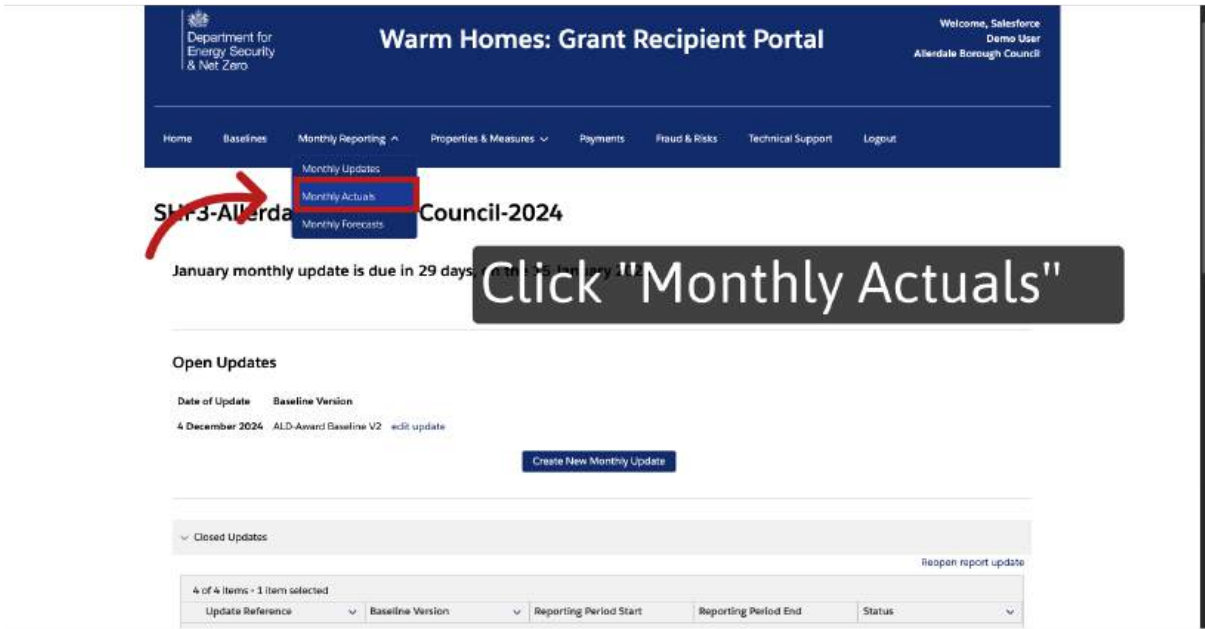
This is where you must submit your reporting by the 10th working day of the month. Once a report is created it will remain in the "Open Updates" section and be editable until the deadline. You can also view historical monthly updates in the table below, named "Closed updates". Click on a Funding Award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



**Warm Homes: Grant Recipient Portal**

Welcome, Salesforce Demo User

Allerdale Borough Council

Home

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

Funding Award Actual Name	Parent Baseline Version	Actuals Start Date	Actuals End Date
<input type="checkbox"/> ACT-00008	ALD-Phase-1-Baseline V4	1 Dec 2024	31 Dec 2024
<input type="checkbox"/> UPD-00001	ALD-Phase-1-Baseline V3	1 Nov 2024	30 Nov 2024
<input type="checkbox"/> ACT-00009	ALD-Phase-1-Baseline V4	1 Nov 2024	30 Nov 2024
<input type="checkbox"/> ACT-00012	ALD-Award Baseline V2		
<input type="checkbox"/> UPD-00003	ALD-Phase-1-Baseline V3		
<input type="checkbox"/> UPD-00002	ALD-Phase-1-Baseline V3		
<input type="checkbox"/> UPD-00000	ALD-Phase-1-Baseline V3		

18. Click "Monthly Forecasts"

The last tab in Monthly Reporting is Monthly Forecasts.



**Warm Homes: Grant Recipient Portal**

Welcome, Salesforce Demo User

Allerdale Borough Council

Home

Baselines

Monthly Reporting

Properties & Measures

Payments

Fraud & Risks

Technical Support

Logout

Monthly Updates

Monthly Actuals

**Monthly Forecasts**

**SHF3-Allerdale Borough Council-2024**

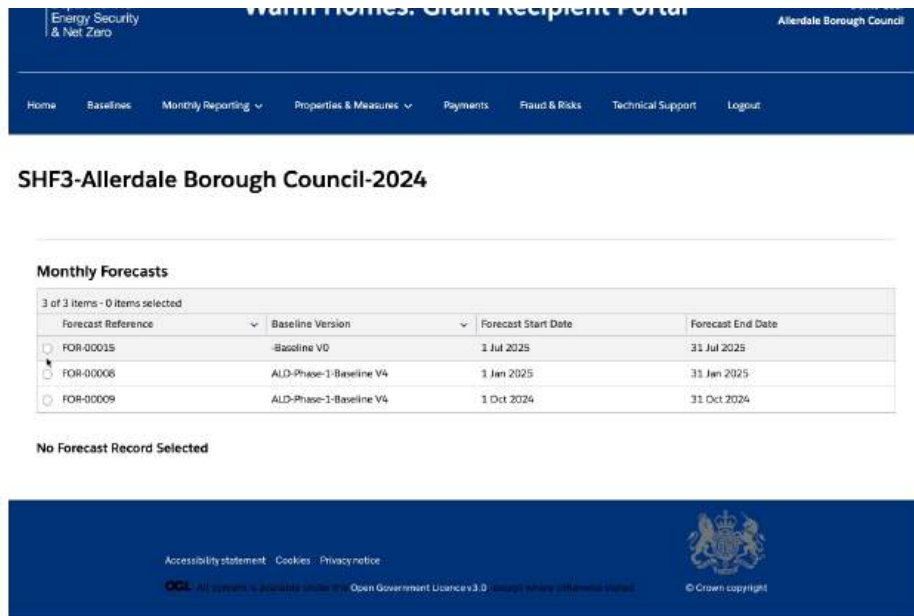
**Monthly Actuals**

7 of 7 items - 1 item selected

Funding Award Actual Name	Parent Baseline Version	Actuals Start Date	Actuals End Date
<input checked="" type="checkbox"/> ACT-00008	ALD-Phase-1-Baseline V4	1 Dec 2024	31 Dec 2024
<input type="checkbox"/> UPD-00001	ALD-Phase-1-Baseline V3	1 Nov 2024	30 Nov 2024
<input type="checkbox"/> ACT-00009	ALD-Phase-1-Baseline V4	1 Nov 2024	30 Nov 2024
<input type="checkbox"/> ACT-00012	ALD-Award Baseline V2		
<input type="checkbox"/> UPD-00003	ALD-Phase-1-Baseline V3		
<input type="checkbox"/> UPD-00002	ALD-Phase-1-Baseline V3		
<input type="checkbox"/> UPD-00000	ALD-Phase-1-Baseline V3		

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



Energy Security & Net Zero

Warm Homes: Grant Recipient Portal

Allerdale Borough Council

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

### SHF3-Allerdale Borough Council-2024

#### Monthly Forecasts

3 of 3 items - 0 items selected

Forecast Reference	Baseline Version	Forecast Start Date	Forecast End Date
<input type="checkbox"/> FOR-00015	Baseline V0	1 Jul 2025	31 Jul 2025
<input type="checkbox"/> FOR-00008	ALD-Phase-1-Baseline V4	1 Jan 2025	31 Jan 2025
<input type="checkbox"/> FOR-00009	ALD-Phase-1-Baseline V4	1 Oct 2024	31 Oct 2024

No Forecast Record Selected

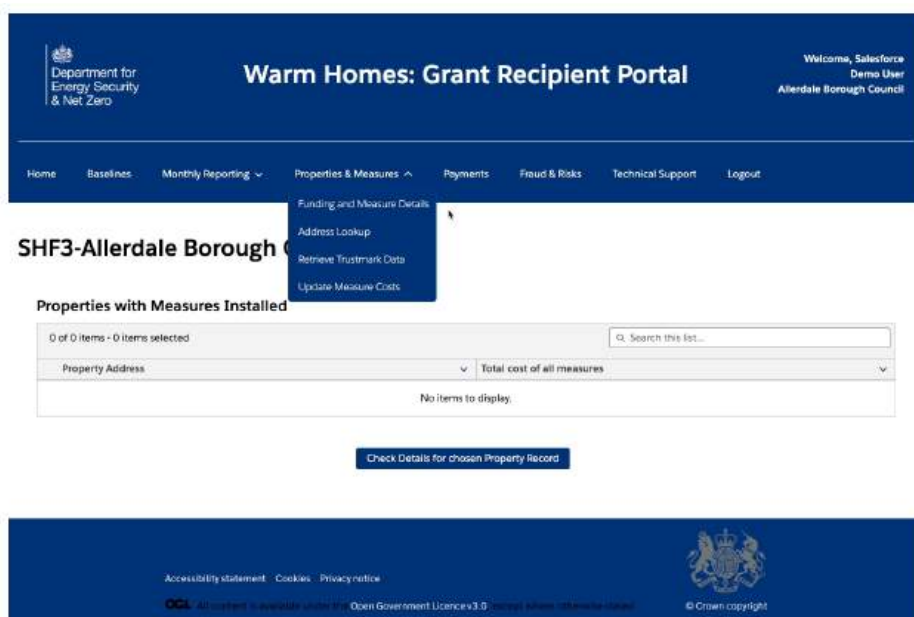
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## 20. "Properties and Measures" Overview

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



Department for Energy Security & Net Zero

Warm Homes: Grant Recipient Portal

Welcome, Salesforce Demo User Allerdale Borough Council

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

SHF3-Allerdale Borough Council

- Funding and Measure Details
- Address Lookup
- Retrieve Trustmark Data
- Update Measure Costs

#### Properties with Measures Installed

0 of 0 items - 0 items selected

Search this list...

Property Address	Total cost of all measures
No items to display.	

Check Details for chosen Property Record

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## 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

The screenshot shows the 'Warm Homes: Grant Recipient Portal' interface. A red arrow points to the 'Payments' link in the navigation menu. Below the navigation bar, the page title is 'SHF3-Allerdale Borough Council-2024'. The main content area is titled 'Payment History' and shows a table of payments. The table has columns for 'Payment Reference', 'Amount', 'Scheduled Date', 'Disbursement Date', and 'Payment Received'. There are two rows of data, both with a 'Payment Received' status of '✓'.

Click "Payments"

Warm Homes: Grant Recipient Portal

Welcome, Salesforce Demo User  
Allerdale Borough Council

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

SHF3-Allerdale Borough Council-2024

Payment History

Payments Awaiting Confirmation of Receipt  
2 of 2 items - 0 items selected

Payment Reference	Amount	Scheduled Date	Disbursement Date	Payment Received
☐	£8,000.00	24/10/2024, 12:00		
○	£5,678.00	16/12/2024, 12:00	16/12/2024, 12:00	

Select Record above and Confirm Payment Received

3 of 3 items


Payment Reference	Amount	Scheduled Date	Disbursement Date	Payment Received
	£500.00	16/12/2024, 12:00	16/12/2024, 12:00	✓
	£6,500.00	16/12/2024, 12:00	16/12/2024, 12:00	✓
	£3,500.00	30/10/2024, 12:00		✓

<https://demo-gm-43.sandbox.my.salesforce.com/warmhomesportal/payments>

## 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

## Click "Fraud & Risks"



Department for Energy Security & Net Zero

### Warm Homes: Grant Recipient Portal

Welcome, Salesforce Demo User  
Allerdale Borough Council

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

#### Fraud and Risks

This provides a list of risks and issues that have been raised for this project. You can search each list independently to be able to filter the records displayed.

#### SHF3-Allerdale Borough Council-2024

##### Fraud

5 of 5 items • 0 items selected


Ref No.	Subject	Created On	Status
00001026	Property application filed incorrectly	16/12/2024, 16:25	Closed
00001023	Property application filed incorrectly	16/12/2024, 16:20	Closed
00001021	Insulation not done correctly	16/12/2024, 14:30	New
Money has			

No Record Selected

## 23. Click "Technical Support"

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

## Click "Technical Support"



Department for Energy Security & Net Zero

### Warm Homes: Grant Recipient Portal

Welcome, Salesforce Demo User  
Allerdale Borough Council

Home Baselines Monthly Reporting Properties & Measures Payments **Technical Support** Logout

#### Fraud and Risks

This provides a list of risks and issues that have been raised for this project. You can search each list independently to be able to filter the records displayed.

#### SHF3-Allerdale Borough Council-2024

##### Fraud

5 of 5 items • 0 items selected

Ref No.	Subject	Created On	Status
00001026	Property application filed incorrectly	16/12/2024, 16:25	Closed
00001023	Property application filed incorrectly	16/12/2024, 16:20	Closed
00001021	Insulation not done correctly	16/12/2024, 14:30	New
Money has			

No Record Selected

## 24. Click "Logout"

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



Department for Energy Security & Net Zero

## Warm Homes: Grant Recipient Portal

Welcome, Jane Doe  
Allerdale Borough Council

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

**SHF3-Allerdale Borough Council-2024**

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

**Click "Create New Monthly Update"**

**Open Updates**

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

[Create New Monthly Update](#)

**Closed Updates**

4 of 4 items - 0 items selected

Update Reference	Baseline Version	Reporting Period Start	Reporting Period End	Status

Reopen report update

## 27. Create New Monthly Update

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

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

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

Start of Reporting Period: 1 Nov 2024  
 End of Reporting Period: 30 Nov 2024

**Summary Details**

\* Date of Update: 17 Dec 2024

\* Homes Approached: 0

\* Phase RAG Rating

☐ Red  
☐ Amber  
☒ Green

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

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

**Narrative**

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

\* Plan for Next Month: 0

\* Progress Update: 0

## 28. Click "Go to Actuals"

Click "Go to Actuals"

\* Date of Update  
17 Dec 2024

\* Homes Approached ⓘ  
454

\* Phase RAG Rating  
☐ Red  
☐ Amber  
☒ Green

Reasons not receiving installations (use CTRL + Click to select more than one option) ⓘ  
 Cost of measures too high  
 Tenant refusal/access to home  
 Enabling works (either too costly or take too long)  
 Home already at EPC C  
 Home has measures already

▼ Narrative

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

\* Plan for Next Month ⓘ  
double check list

\* Progress Update ⓘ  
good progress

Lessons Learned/Other Information (optional) ⓘ

**Click "Go to Actuals"**

[Go to Actuals](#)

## 29. Select an Active Baseline

Click on an an active baseline

Department for Energy Security & Net Zero

**Warm Homes: Grant Recipient Portal**

Welcome, Jane Doe  
Allerdale Borough Council

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

**SHF3-Allerdale Borough Council-2024**

**Click here**

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

\* Choose from Active Baselines  
☒ ALD-Phase-1-Baseline VS

[Go to Actuals](#)

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## 30. 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
<div> <div>Finance Actuals</div> <div>Total Grant Received</div> <div>£24,856</div> </div>			
*Grant Capital Spend		*Grant A&A Spend	
*Co-funding	£28,000	*Combined A&A spend	
*Co-funding Capital Spend			
*Combined Capital Spend			
<div> <div>Homes Actuals</div> <div>Total homes to be treated (from Baseline)</div> <div>70,000</div> </div>			
*Homes identified suitable for retrofit		*Homes Validated (KPI)	
*No. of homes ready for installs to start			
*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 Update: Actuals**  
SHF3-Allerdale Borough Council-2024  
ALD-Phase-1-Baseline V5  
Update Due: 15 January 2025

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

**November 2024**

*Actuals Start Date	1 Nov 2024	*Actuals End Date	30 Nov 2024
<div> <div>Finance Actuals</div> <div>Total Grant Received</div> <div>£24,856</div> </div>			
*Grant Capital Spend	£2,344	*Grant A&A Spend	£4,555
*Co-funding total spend	£345	*Combined A&A spend	£345
*Co-funding Capital Spend	£44		
*Combined Capital Spend	£345		
<div> <div>Homes Actuals</div> <div>Total homes to be treated (from Baseline)</div> <div>70,000</div> </div>			
<div> <div>ERROR: THE TOTAL NUMBER OF HOMES TO BE TREATED HAS BEEN EXCEEDED BY THE HOMES KPI VALUES - PLEASE ADJUST THE NUMBERS TO PROCEED</div> </div>		<div> <div>*Homes Validated (KPI)</div> <div>2,000</div> </div>	

## 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.

## Forecast Page

### 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   
Format: DD 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

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   
Format: DD Dec 2024

✓ Summary Details

\*Date of Update  \*Phase RAG Rating ☐ Red ☒ Amber ☐ Green

\*Homes Approached

Tenant refusal/access to home  
(Final house awarded / failed from 1 month to 6 months from launch)

## Navigate back to Monthly Update

### 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	<a href="#">edit update</a>
17 December 2024	ALD-Award Baseline V3	<a href="#">edit update</a>

Create New Monthly Update

### ▼ Closed Updates

Resopen report update

4 of 4 items - 0 items selected					
Update Reference	Baseline Version	Reporting Period Start	Reporting Period End	Status	
<input type="radio"/> PUP-00003	ALD-Phase-1-Baseline V4	1 Sept 2024	30 Sept 2024	Closed	
<input type="radio"/> PUP-00001	ALD-Phase-1-Baseline V4	1 Oct 2024	31 Oct 2024	Closed	
<input type="radio"/> PUP-00012	ALD-Award Baseline V2	1 Dec 2024	31 Dec 2024	Closed	
<input type="radio"/> PUP-00016	ALD-Award Baseline V2	31 Dec 2024	1 Dec 2024	Closed	

No Update Record Selected

## 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	<a href="#">edit update</a>
17 December 2024	ALD-Award Baseline V3	<a href="#">edit update</a>

Create New Monthly Update

### ▼ Closed Updates

Resopen report update

4 of 4 items - 0 items selected					
Update Reference	Baseline Version	Reporting Period Start	Reporting Period End	Status	
<input type="radio"/> PUP-00003	ALD-Phase-1-Baseline V4	1 Sept 2024	30 Sept 2024	Closed	
<input type="radio"/> PUP-00001	ALD-Phase-1-Baseline V4	1 Oct 2024	31 Oct 2024	Closed	
<input type="radio"/> PUP-00012	ALD-Award Baseline V2	1 Dec 2024	31 Dec 2024	Closed	
<input type="radio"/> PUP-00016	ALD-Award Baseline V2	31 Dec 2024	1 Dec 2024	Closed	

No Update Record Selected

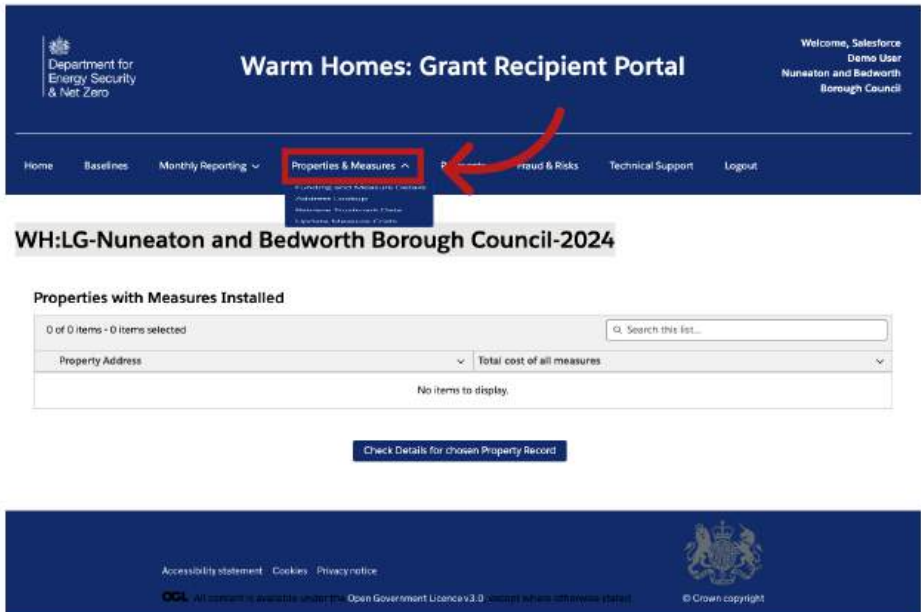
## 36. Managing Properties, Measures & Measure Costs

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

## Managing Properties, Measures & Measure Costs

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

Click the "Properties & Measures" tab



The screenshot shows the 'Warm Homes: Grant Recipient Portal' interface. The top navigation bar includes links for Home, Baselines, Monthly Reporting, Properties & Measures (highlighted with a red box and a red arrow), Fraud & Risks, Technical Support, and Logout. Below the navigation bar, the user is logged in as 'Salesforce Demo User' from 'Nuneaton and Bedworth Borough Council'. The main content area is titled 'WH:LG-Nuneaton and Bedworth Borough Council-2024' and displays a table for 'Properties with Measures Installed'. The table shows 0 of 0 items selected and a search bar. Below the table, there is a button labeled 'Check Details for chosen Property Record'. The footer contains links for Accessibility statement, Cookies, Privacy notice, and a copyright notice for the Crown.

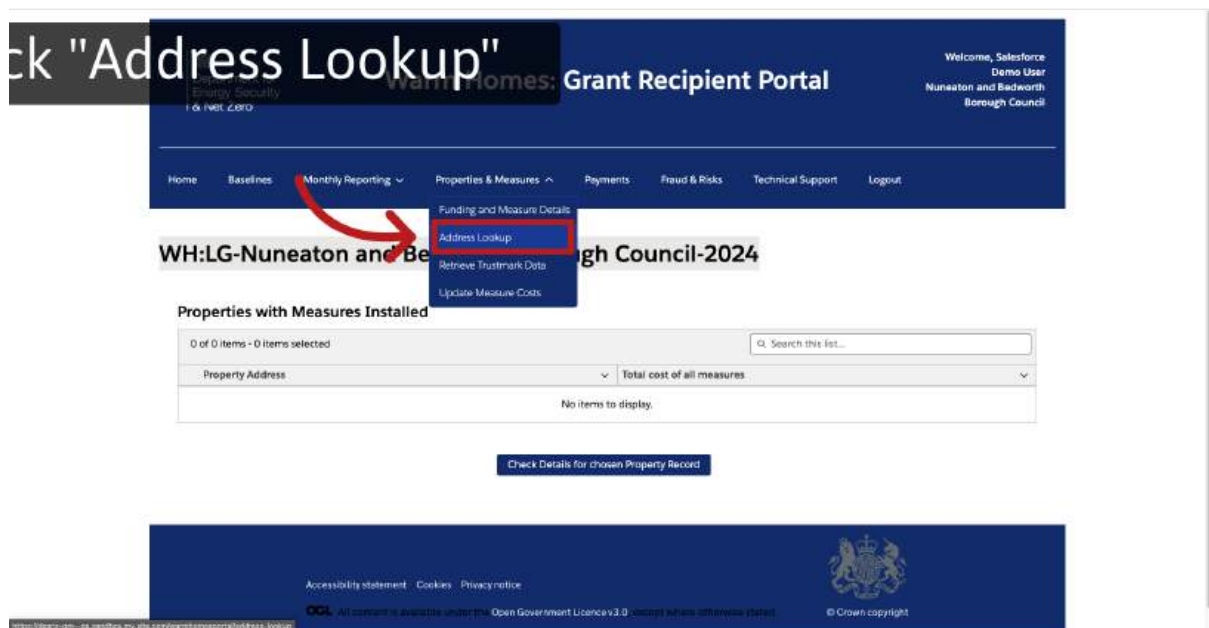
### 38. "Properties with Measures Installed"

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.

here



Department for Energy Security & Net Zero

## Warm Homes: Grant Recipient Portal

Welcome, Salesforce Demo User  
Nuneaton and Bedworth Borough Council

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

### WH:LG-Nuneaton and Bedworth Borough Council-2024

#### Address-Matching Tool

Please paste in a list of up to 100 addresses, with each one on its own line in the following format:  
Home Name/Number, Street/Town/City/Postcode

\*Paste up to 100 addresses, each on a separate line

Submit Addresses for OS Matching

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## 41. Overview

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

Department for Energy Security & Net Zero

## Warm Homes: Grant Recipient Portal

Welcome, Salesforce Demo User  
Nuneaton and Bedworth Borough Council

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

### WH:LG-Nuneaton and Bedworth Borough Council-2024

#### Address-Matching Tool

Please paste in a list of up to 100 addresses, with each one on its own line in the following format:  
Home Name/Number, Street/Town/City/Postcode

\*Paste up to 100 addresses, each on a separate line

Submit Addresses for OS Matching

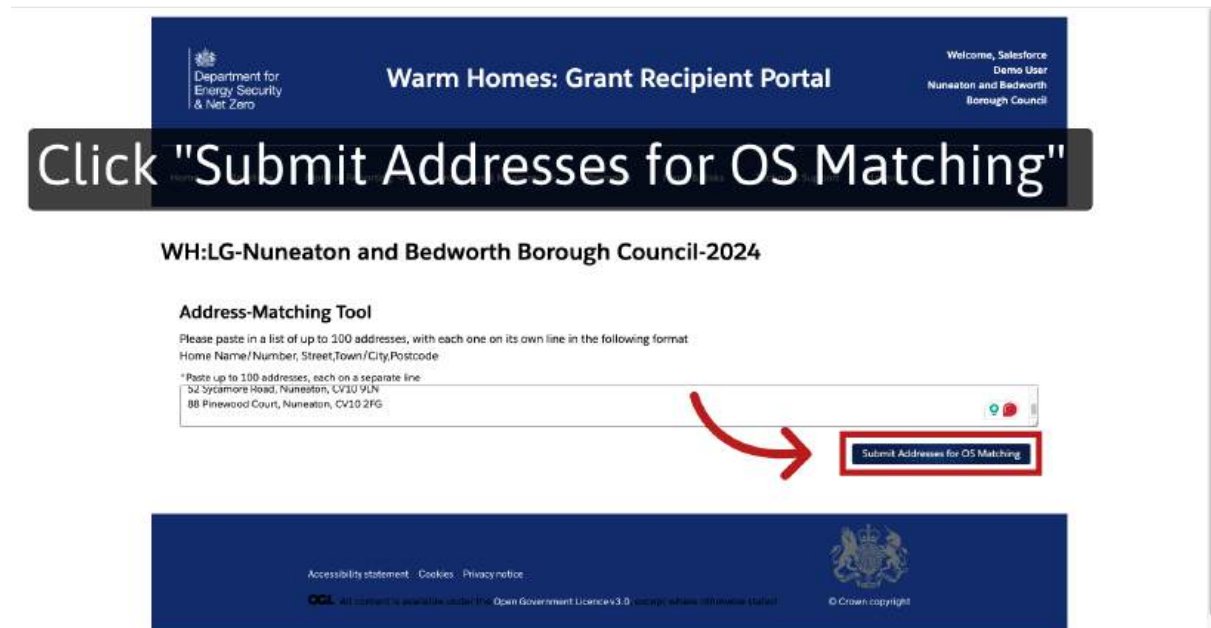
Accessibility statement Cookies Privacy notice

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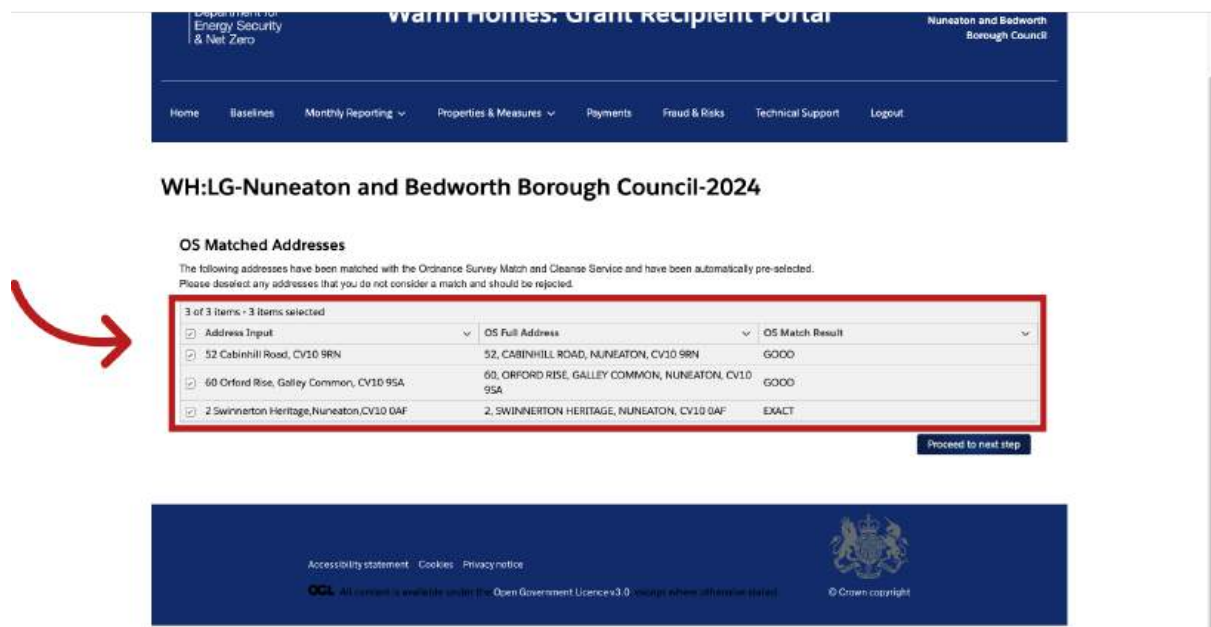
## 42. Click "Submit Addresses for OS Matching"

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"

Department for  
Energy Security  
& Net Zero

Warm Homes: Grant Recipient Portal

Nuneaton and Bedworth  
Borough Council

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

### WH:LG-Nuneaton and Bedworth Borough Council-2024

#### OS Matched Addresses

The following addresses have been matched with the Ordnance Survey Match and Cleanse Service and have been automatically pre-selected. Please deselect any addresses that you do not consider a match and should be rejected.

3 of 3 items - 3 items selected

Address Input	OS Full Address	OS Match Result
<input checked="" type="checkbox"/> 52 Cabinhill Road, CV10 9RN	52, CABINHILL ROAD, NUNEATON, CV10 9RN	GOOD
<input checked="" type="checkbox"/> 60 Orford Rise, Galley Common, CV10 9SA	60, ORFORD RISE, GALLEY COMMON, NUNEATON, CV10 9SA	GOOD
<input checked="" type="checkbox"/> 2 Swinerton Heritage, Nuneaton, CV10 0AF	2, SWINERTON HERITAGE, NUNEATON, CV10 0AF	EXACT

[Proceed to next step](#)

[Accessibility statement](#)
[Cookies](#)
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## 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.

Energy Security  
& Net Zero

Warm Homes: Grant Recipient Portal

Nuneaton and Bedworth  
Borough Council

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

### WH:LG-Nuneaton and Bedworth Borough Council-2024

#### OS Partial Match Addresses

The following addresses have been partially matched with the Ordnance Survey Match and Cleanse Service. Please review and select any addresses that you wish to use. By making selection the system will be using the UPRN returned by OS for matching to Trustmark.

4 of 4 items - 1 item selected

Search Input	OS Address
<input checked="" type="checkbox"/> 7P Finmere Way, Shirley, Solihull, B90 3SS	7, FINMERE WAY, SHIRLEY, SOLIHULL, B90 3SS
<input type="checkbox"/> 23P The Brow, Twerton, Bath, BA2 1EA	23, THE BROW, BATH, BA2 1EA
<input type="checkbox"/> 58B Cabinhill Road, Nuneaton, CV10 9RN	58, CABINHILL ROAD, NUNEATON, CV10 9RN
<input type="checkbox"/> 13b Old Hincley Road, Nuneaton, CV10 0AA	13, OLD HINCLEY ROAD, NUNEATON, CV10 0AA

[Proceed to next step](#)

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## 46. OS Partial Match Addresses

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



Energy Security  
& Net Zero

Warm Homes: Grant recipient Portal

Nuneaton and Bedworth  
Borough Council

[Home](#) [Baselines](#) [Monthly Reporting](#) [Properties & Measures](#) [Payments](#) [Fraud & Risks](#) [Technical Support](#) [Logout](#)

### WH:LG-Nuneaton and Bedworth Borough Council-2024

#### OS Unmatched Addresses

The following addresses have not been matched with the Ordnance Survey Match and Cleanse Service and therefore no UPRN is available to match with the TrustMark Data service. In order to modify an address please enter a valid address to obtain an address with a UPRN. Any addresses that do not have a match will be rejected.

4 of 4 items

Address Input	OS Match Result
16 Bridge Terrace, Kereswick, CA12 5EQ	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

Proceed to next step

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## 49. Click "Proceed to next step"

Click "Proceed to next step"

Energy Security  
& Net Zero

Warm Homes: Grant recipient Portal

Nuneaton and Bedworth  
Borough Council

[Home](#) [Baselines](#) [Monthly Reporting](#) [Properties & Measures](#) [Payments](#) [Fraud & Risks](#) [Technical Support](#) [Logout](#)

### WH:LG-Nuneaton and Bedworth Borough Council-2024

#### OS Unmatched Addresses

The following addresses have not been matched with the Ordnance Survey Match and Cleanse Service and therefore no UPRN is available to match with the TrustMark Data service. In order to modify an address please enter a valid address to obtain an address with a UPRN. Any addresses that do not have a match will be rejected.

4 of 4 items

Address Input	OS Match Result
16 Bridge Terrace, Kereswick, CA12 5EQ	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

Proceed to next step

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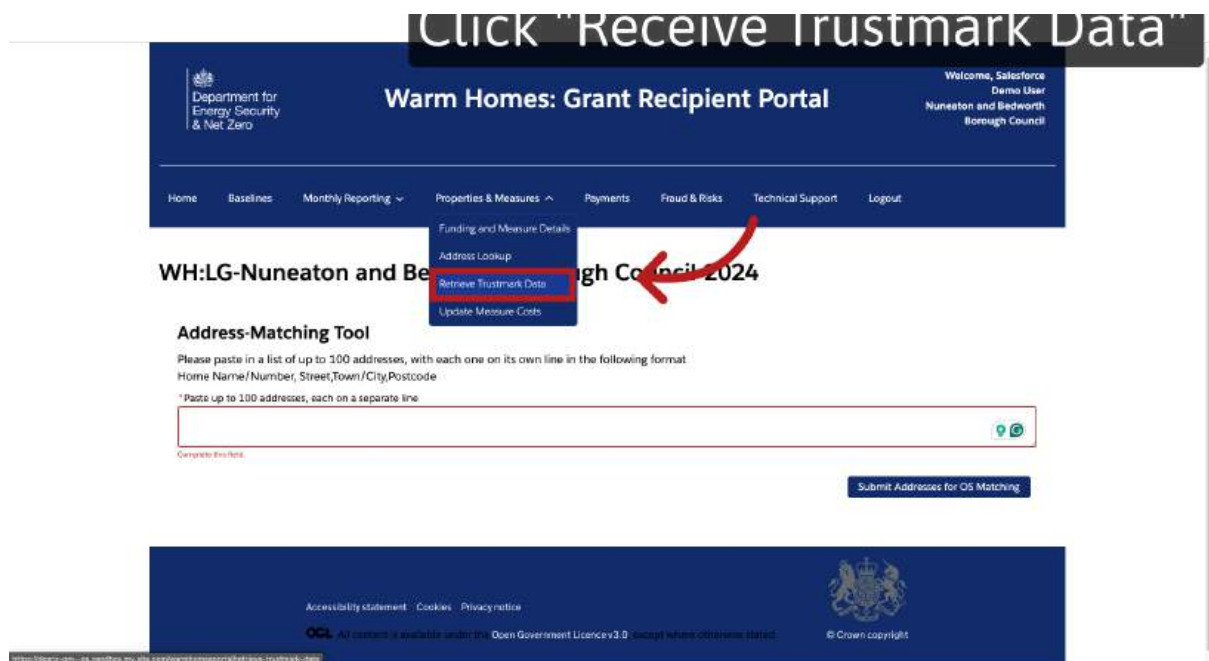
## 50. Click "Finish"

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.

Net Zero
Borough Council

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

WH:LG-Nuneaton and Bedworth Borough Council-2024

7 of 7 items

Short address	Measure Type	Date of Completing Installation	Trustmark UMR
52 Cabinhill Road, CV10 9RN	Cavity wall insulation (0.027)	6 Dec 2024	P19292XRWL
60 Orford Rise, CV10 9SA	Cavity wall insulation (0.027)	6 Dec 2024	P192908MKH
7 Finmere Way, B90 3SS	Cavity wall insulation (0.027)	20 Nov 2024	P18833UPZV
7 Finmere Way, B90 3SS	Window glazing - improved double glazing	13 Nov 2024	P18773DLKP
7 Finmere Way, B90 3SS	First time central heating (FTCH)	8 Mar 2024	P14574CDBE
7 Finmere Way, B90 3SS	Programmer and room thermostat	7 Mar 2024	P1457467FF
7 Finmere Way, B90 3SS	Loft insulation where there is less than or equal to 100mm pre-existing insulation	6 Mar 2024	P1457403UL

Add costs to Trustmark Data

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### 53. Click "Add costs to Trustmark Data"

proceed to the next step

Net Zero
Borough Council

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

WH:LG-Nuneaton and Bedworth Borough Council-2024

7 of 7 items

Short address	Measure Type	Date of Completing Installation	Trustmark UMR
52 Cabinhill Road, CV10 9RN	Cavity wall insulation (0.027)	6 Dec 2024	P19292XRWL
60 Orford Rise, CV10 9SA	Cavity wall insulation (0.027)	6 Dec 2024	P192908MKH
7 Finmere Way, B90 3SS	Cavity wall insulation (0.027)	20 Nov 2024	P18833UPZV
7 Finmere Way, B90 3SS	Window glazing - improved double glazing	13 Nov 2024	P18773DLKP
7 Finmere Way, B90 3SS	First time central heating (FTCH)	8 Mar 2024	P14574CDBE
7 Finmere Way, B90 3SS	Programmer and room thermostat	7 Mar 2024	P1457467FF
7 Finmere Way, B90 3SS	Loft insulation where there is less than or equal to 100mm pre-existing insulation	6 Mar 2024	P1457403UL

Add costs to Trustmark Data

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### 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, , 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 <input type="text"/>
7 FINMERE WAY, SHIRLEY, SOLIHULL, , 890 355 Measure Type: Programmer and room thermostat Date of Completion: 7 March 2024 Trustmark UMR: P1457467FF Total Cost of Single Measure <input type="text"/>
7 FINMERE WAY, SHIRLEY, SOLIHULL, , 890 355 Measure Type: First time central heating (FTCH) Date of Completion: 8 March 2024 Trustmark UMR: P14574CDBE Total Cost of Single Measure <input type="text"/>
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 <input type="text"/>

## 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".

**Warm Homes: Grant Recipient Portal**

Welcome, Salesforce  
Demo User  
Nuneaton and Bedworth  
Borough Council

[Home](#) [Baselines](#) [Monthly Reporting](#) [Properties & Measures](#) [Payments](#) [Fraud & Risks](#) [Technical Support](#) [Logout](#)

**WH:LG-Nuneaton and Bedworth Borough Council-2024**  
**Measure Cost Input**  
There are currently no measures that need updating

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## 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.



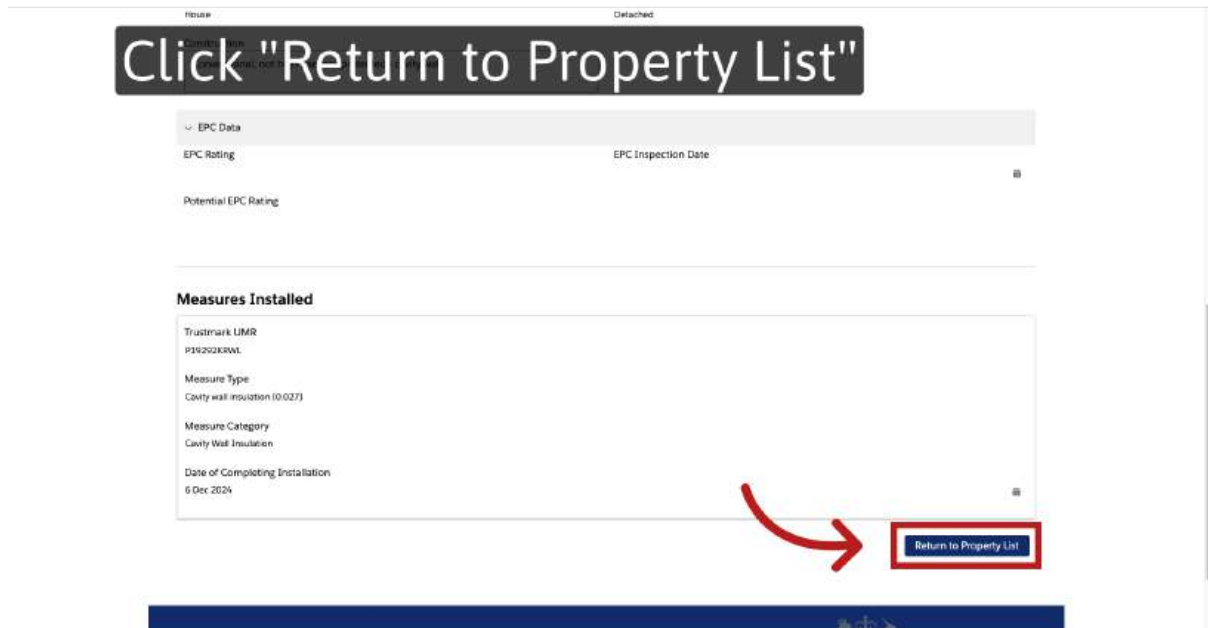
## 57. View Properties with Measures Installed

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.

Department for Energy Security & Net Zero

## Warm Homes: Grant Recipient Portal

Welcome, John Smith  
Allerdale Borough Council

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

January monthly update is due in 30 days, on the 15 January 2025

### SHF3-Allerdale Borough 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 <span style="color: green;">●</span>
--	--	---	---

#### Award Summary

##### Application Details

- Grant Recipient Details
 

Applicant Organisation Allerdale Borough Council	Grant Recipient Type Local Authority
Grant Recipient Size	

## 61. Grant Recipient

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

Department for Energy Security & Net Zero

## Warm Homes: Grant Recipient Portal

Welcome, John Smith  
Allerdale Borough Council

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

January monthly update is due in 30 days, on the 15 January 2025

### SHF3-Allerdale Borough 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 <span style="color: green;">●</span>
--	--	---	---

#### Award Summary

##### Application Details

- Grant Recipient Details
 

Applicant Organisation Allerdale Borough Council	Grant Recipient Type Local Authority
Grant Recipient Size	

## 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: Grant Recipient Portal

Welcome, John Smith  
Allerdale Borough Council

Home Baselines Monthly Reporting Properties & Measures **Payments** Technical Support Logout

January monthly update is due in 30 days, on the 15 January 2025

**SHF3-Allerdale Borough 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
--	--	---	----------------------

**Award Summary**

**Application Details**

Grant Recipient Details

Applicant Organisation  
Allerdale Borough Council

Grant Recipient Type  
Local Authority

Grant Recipient Size

## 63. Click here

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

Department for Energy Security & Net Zero

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

**SHF3-Allerdale Borough Council-2024**

**Payment History**

Payments Awaiting Confirmation of Receipt

2 of 2 items - 1 item selected

Payment Reference	Amount	Scheduled Date	Disbursement Date	Payment Received
<input type="checkbox"/>	£8,000.00	24/10/2024, 12:00		
<input checked="" type="checkbox"/>	£6,500.00	16/12/2024, 12:00	16/12/2024, 12:00	

Select Record above and Confirm Payment Received

**Payments Awaiting Confirmation of Receipt**

Payment Reference	Amount	Scheduled Date	Disbursement Date	Payment Received
			16/12/2024, 12:00	✓
			30/10/2024, 12:00	✓

Accessibility statement Cookies Privacy notice

## 64. Select Record

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

Energy Security & Net Zero

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

### SHF3-Allerdale Borough Council-2024

Payment History

## Select Record

2 of 2 items - 1 item selected

Payment Reference	Amount	Scheduled Date	Disbursement Date	Payment Received
<input type="checkbox"/>	£8,000.00	24/10/2024, 12:00		
<input checked="" type="checkbox"/>	£6,500.00	16/12/2024, 12:00	16/12/2024, 12:00	

Select Record above and Confirm Payment Received

Payment Reference	Amount	Scheduled Date	Disbursement Date	Payment Received
	£500.00	16/12/2024, 12:00	16/12/2024, 12:00	✓
	£3,500.00	30/10/2024, 12:00		✓

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## 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.

Energy Security & Net Zero

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

### SHF3-Allerdale Borough Council-2024

Payment History

## Click "Select Record above and Confirm Payment Received"

2 of 2 items - 1 item selected

Payment Reference	Amount	Scheduled Date	Disbursement Date	Payment Received
<input type="checkbox"/>	£8,000.00	24/10/2024, 12:00		
<input checked="" type="checkbox"/>	£6,500.00	16/12/2024, 12:00	16/12/2024, 12:00	

Select Record above and Confirm Payment Received

Payment Reference	Amount	Scheduled Date	Disbursement Date	Payment Received
	£500.00	16/12/2024, 12:00	16/12/2024, 12:00	✓
	£3,500.00	30/10/2024, 12:00		✓

Accessibility statement Cookies Privacy notice

## 66. Validate Confirmed Payment in Portal

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

[Home](#)
[Baselines](#)
[Monthly Reporting](#)
[Properties & Measures](#)
[Payments](#)
[Fraud & Risks](#)
[Technical Support](#)
[Logout](#)

### SHF3-Allerdale Borough Council-2024

#### Payment History

Payments Awaiting Confirmation of Receipt  
 1 of 1 item - 0 items selected

Payment Reference	Amount	Scheduled Date	Disbursement Date	Payment Received
<input type="text"/>	£8,000.00	24/10/2024, 12:00		


Select Record above and Confirm Payment Received

3 of 3 items

Payment Reference	Amount	Scheduled Date	Disbursement Date	Payment Received
	£500.00	16/12/2024, 12:00	16/12/2024, 12:00	✓
	£6,500.00	16/12/2024, 12:00	16/12/2024, 12:00	✓
	£3,500.00		30/10/2024, 12:00	✓

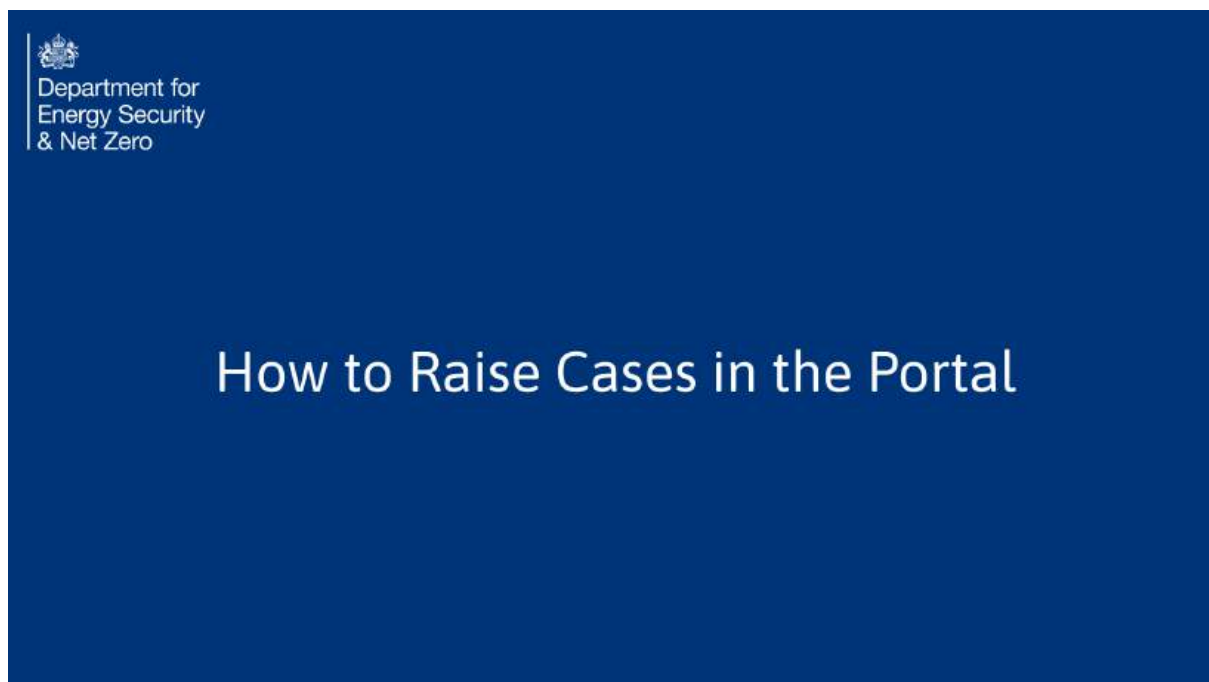
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## 67. How to Raise Cases in the Portal

Now, let's look into how to Raise Cases in the Portal



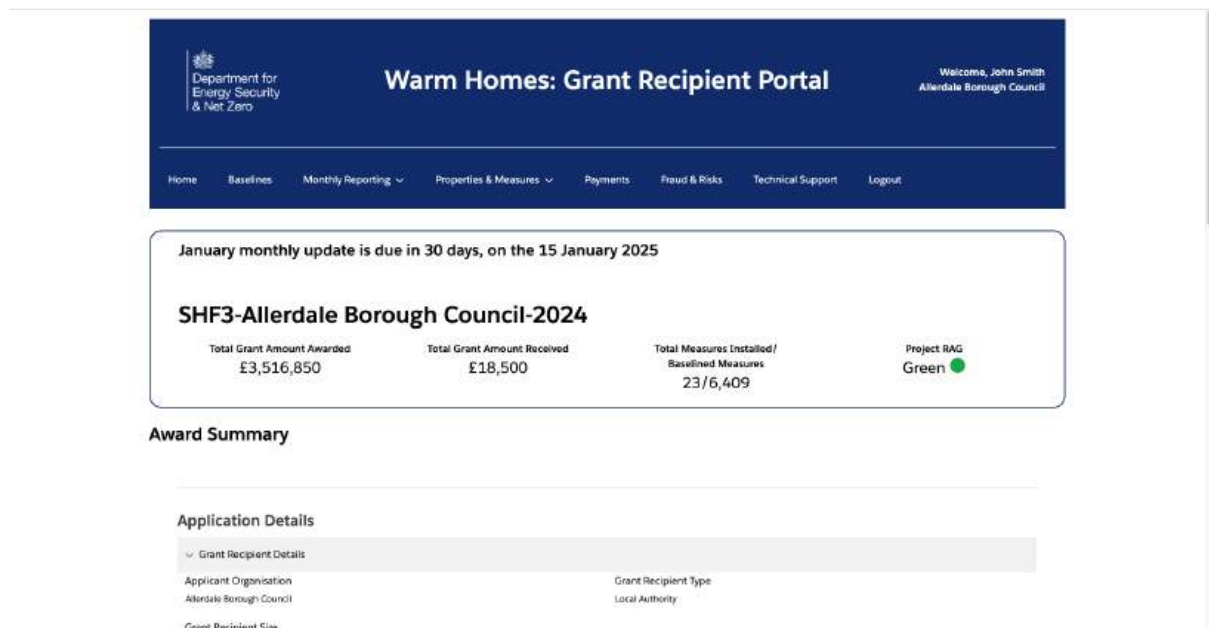
## 68. Grant Recipient Portal: Raising a Support Case

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

# Grant Recipient Portal: Raising a Support Case

## 69. Grant Recipient Homepage

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



The screenshot shows the 'Warm Homes: Grant Recipient Portal' homepage. At the top, there is a dark blue header with the Department for Energy Security & Net Zero logo on the left, the portal title 'Warm Homes: Grant Recipient Portal' in the center, and a welcome message 'Welcome, John Smith, Allerdale Borough Council' on the right. Below the header is a navigation bar with links: Home, Baselines, Monthly Reporting (with a dropdown arrow), Properties & Measures (with a dropdown arrow), Payments, Fraud & Risks, Technical Support, and Logout.

Below the navigation bar, a white box contains a notification: 'January monthly update is due in 30 days, on the 15 January 2025'. Below this, another white box displays the 'SHF3-Allerdale Borough Council-2024' summary with four metrics:

Total Grant Amount Awarded	Total Grant Amount Received	Total Measures Installed/ Baselined Measures	Project RAG
£3,516,850	£18,500	23/6,409	Green <span style="color: green;">●</span>

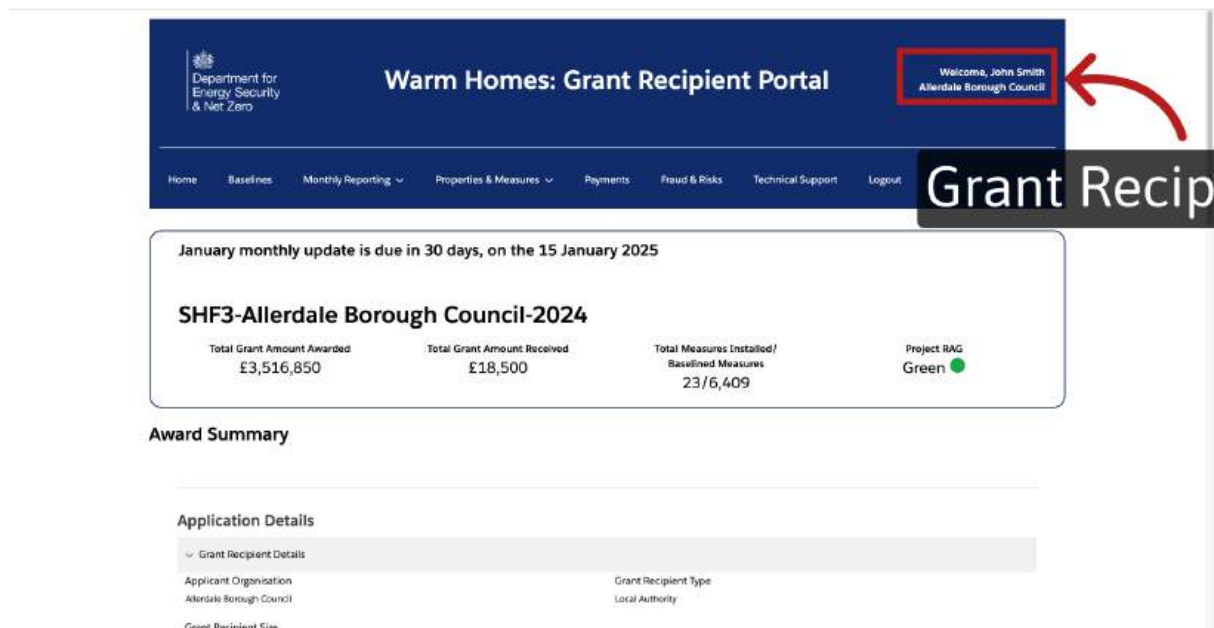
Below the summary box is the 'Award Summary' section, which includes an 'Application Details' subsection. Under 'Application Details', there is a 'Grant Recipient Details' section with a dropdown arrow. Below this, the following information is displayed:

Applicant Organisation	Grant Recipient Type
Allerdale Borough Council	Local Authority

At the bottom, the 'Grant Recipient Size' is listed.

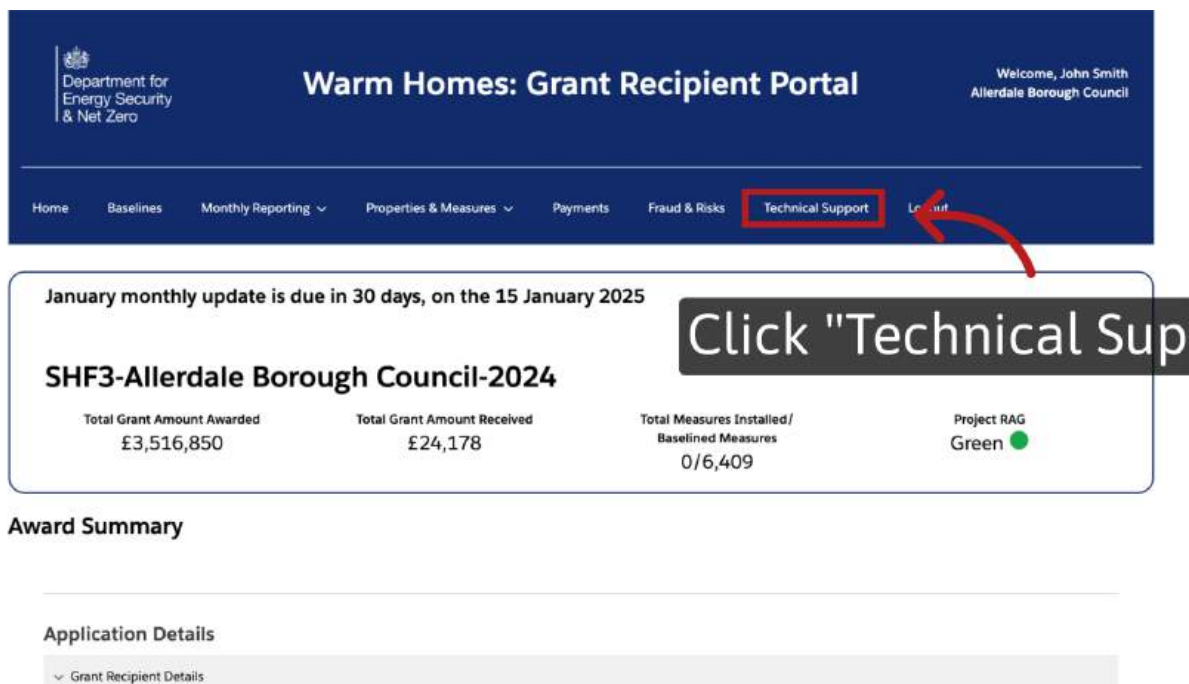
## 70. Grant Recipient

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.

**Warm Homes: Grant Recipient Portal**

Welcome, John Smith  
Allerdale Borough Council

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

### Help and Support

For technical support including login and access issues as well as permissions (such as accessing reports) please contact the technical support team at placeholder.help@digitalmodus.com For other questions relating to the operation of the scheme please contact .....

#### Support Cases

3 of 3 items • 1 item selected

Ref No.	Subject	Created On	Status
<input checked="" type="radio"/> 00001022	Cannot login	16/12/2024, 16:19	Closed
<input type="radio"/> 00001018	Cannot login	16/12/2024, 16:05	New
<input type="radio"/> 00001017	Login problems	12/12/2024, 20:41	Escalated

[Create Support case](#)

#### Support Case Details

<b>Case Number</b> 00001022	<b>Status</b> Closed
<b>Subject</b> Cannot login	<b>Date / Time Opened</b> 16/12/2024, 16:19
<b>Description</b> cannot login	<b>Date / Time Closed</b> 16/12/2024, 16:19

Open Monthly Update Requests No Record Selected

## 73. Support Case Details

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

**Warm Homes: Grant Recipient Portal**

Welcome, John Smith  
Allerdale Borough Council

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

### Help and Support

For technical support including login and access issues as well as permissions (such as accessing reports) please contact the technical support team at placeholder.help@digitalmodus.com For other questions relating to the operation of the scheme please contact .....

#### Support Cases

3 of 3 items • 1 item selected

Ref No.	Subject	Created On	Status
<input type="radio"/> 00001022	Cannot login	16/12/2024, 16:19	Closed
<input checked="" type="radio"/> 00001018	Cannot login	16/12/2024, 16:05	New
<input type="radio"/> 00001017	Login problems	12/12/2024, 20:41	Escalated

[Create Support case](#)

#### Support Case Details

<b>Case Number</b> 00001018	<b>Status</b> New
<b>Subject</b> Cannot login	<b>Date / Time Opened</b> 16/12/2024, 14:05
<b>Description</b> Cannot login	<b>Date / Time Closed</b>

Open Monthly Update Requests No Record Selected

## 74. Click "Create Support case"

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

The screenshot shows the 'Warm Homes: Grant Recipient Portal' for John Smith of Allerdale Borough Council. The 'Support' menu is active, leading to the 'Support Cases' page. A table lists three support cases, with the third case (00001017) selected. A red arrow points to the 'Create Support case' button at the bottom of the table.

Ref No.	Subject	Created On	Status
00001022	Cannot login	16/12/2024	Closed
00001018	Cannot login	12/12/2024	New
00001017	Login problems	12/12/2024, 20:41	Escalated

**Support Case Details**

Case Number: 00001017  
Status: Escalated  
Subject: Login problems  
Date / Time Opened: 12/12/2024, 20:41

**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".

The screenshot shows the 'Create Support Case' form. The title is 'Create Help and Support Case Record' for 'SHF3-Allerdale Borough Council-2024'. The form has two main sections: 'Help or Support Summary' and 'Description'. The 'Help or Support Summary' field contains the text 'Cannot login'. The 'Description' field is empty. A 'Next' button is located at the bottom right of the form.

**Create Help and Support Case Record**  
SHF3-Allerdale Borough Council-2024

Please enter details of help 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.

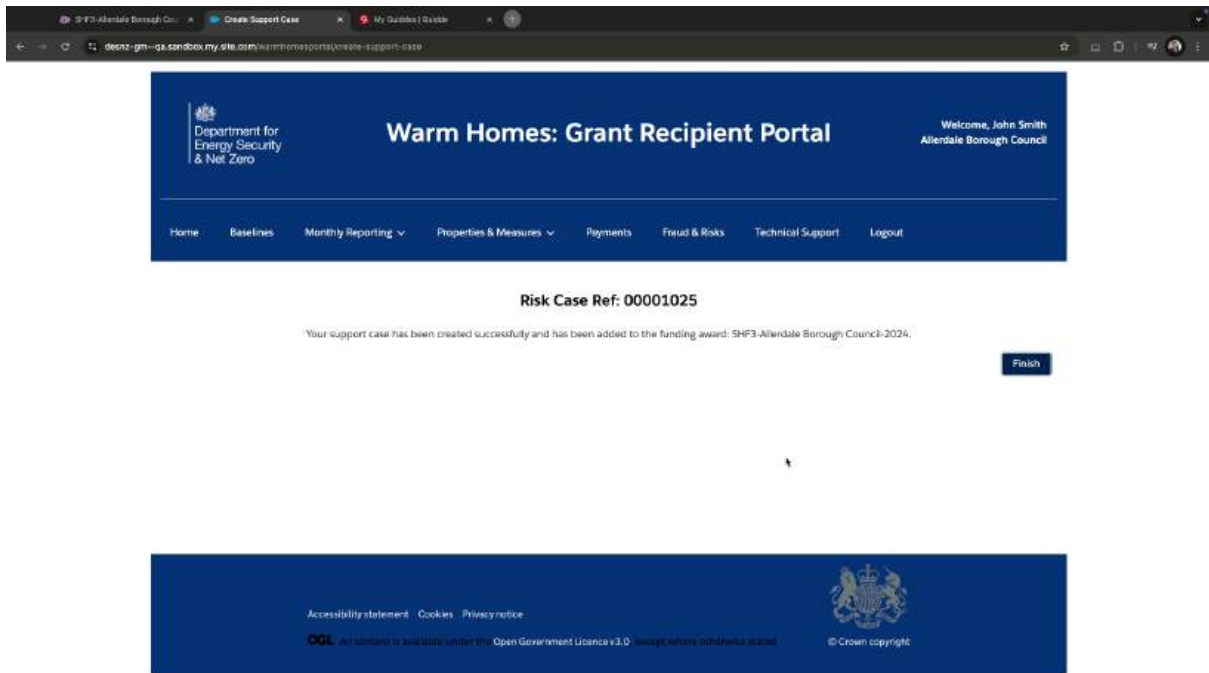
\*Help or Support Summary  
Cannot login

\*Description  
[Empty text area]

Next

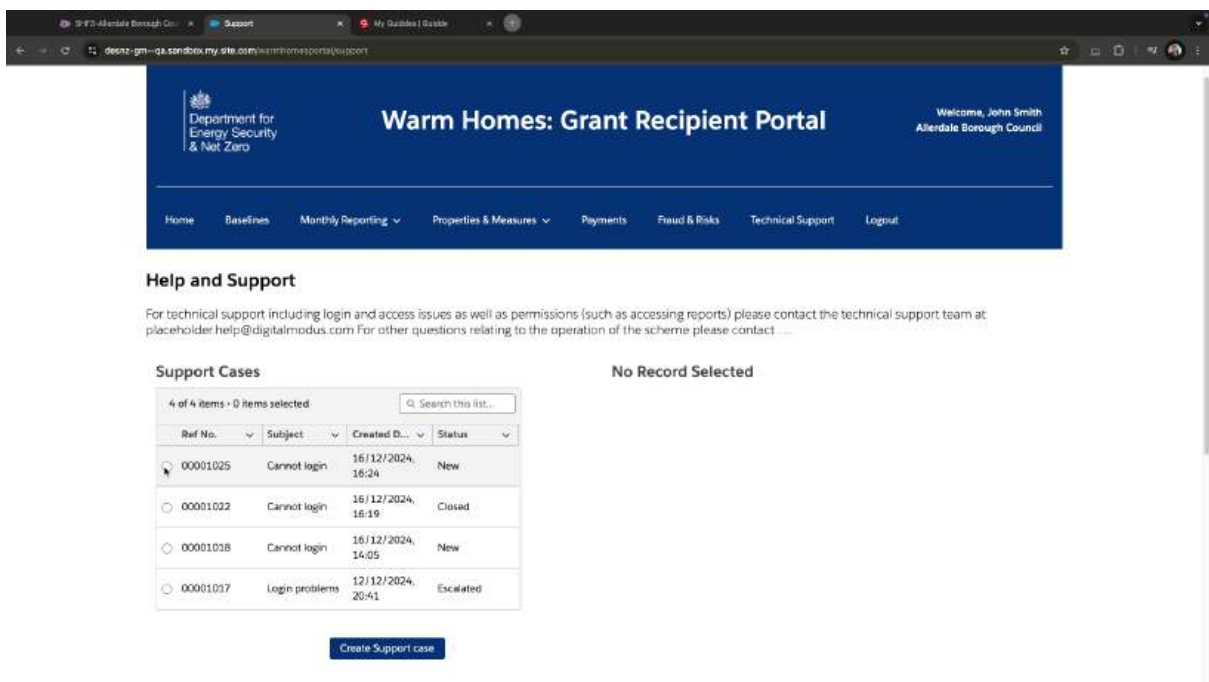
## 76. Case Reference

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".

The screenshot shows the 'Warm Homes: Grant Recipient Portal' interface. The top navigation bar includes links for Home, Baselines, Monthly Reporting, Properties & Measures, Payments, **Fraud & Risks** (highlighted with a red box and arrow), Support, and Logout. Below the navigation bar, a notification states: 'January monthly update is due in 29 days, on the 15 January 2025'. The main content area displays 'SHF3-Allerdale Borough Council-2024' with the following data:

Total Grant Amount Awarded	Total Grant Amount Received	Total Measures Installed/ Baselined Measures	Project RAG
£3,516,850	£24,178	0/6,409	Green

Below this is the 'Award Summary' section, which includes 'Application Details' and 'Grant Recipient Details'.

**Click "Fraud & Risks"**

## 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.

**Warm Homes: Grant Recipient Portal**

Welcome, John Smith  
Allerdale Borough Council

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

**Fraud and Risks**

This provides a list of risks and issues that have been raised for this project. You can search each list independently to be able to filter the records displayed.

**SHF3-Allerdale Borough Council-2024**

**Fraud**

4 of 4 items • 0 items selected

Ref No.	Subject	Created On	Status
00001023	Property application filled incorrectly	16/12/2024, 16:20	Closed
00001021	Insulation not done correctly	16/12/2024, 14:30	New
00001025	Money has been sent to the wrong supplier	12/12/2024, 20:34	New
00001006	Fraud summary	06/11/2024, 11:11	New

No Record Selected

## 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.

**Warm Homes: Grant Recipient Portal**

Welcome, John Smith  
Allerdale Borough Council

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

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## 82. Add Case Details

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

The screenshot shows a web browser window with the URL `deon2-gm-ga.sandbox.my.site.com/warmhomesportal/create-fraud`. The page header includes the Department for Energy Security & Net Zero logo, the title "Warm Homes: Grant Recipient Portal", and a welcome message for John Smith from Allerdale Borough Council. A navigation bar contains links for Home, Baselines, Monthly Reporting, Properties & Measures, Payments, Fraud & Risks, Technical Support, and Logout. The main heading is "Create Fraud Record" with the sub-heading "SHF3-Allerdale Borough Council-2024". Below this, a message states: "Please enter details of any fraud related to this award. This information will help us monitor potential challenges and take appropriate actions to address them effectively." The form includes several fields: "Summary of Risk" with a dropdown menu showing "Measure/Installation" and "Category of Risk" with a dropdown menu showing "Measures not installed". There is a "Fraud Summary" section with a text input field containing "Property application filed incorrectly". Below this is a "Fraud Description" section with a larger text input field. A "Next" button is located at the bottom right of the form.

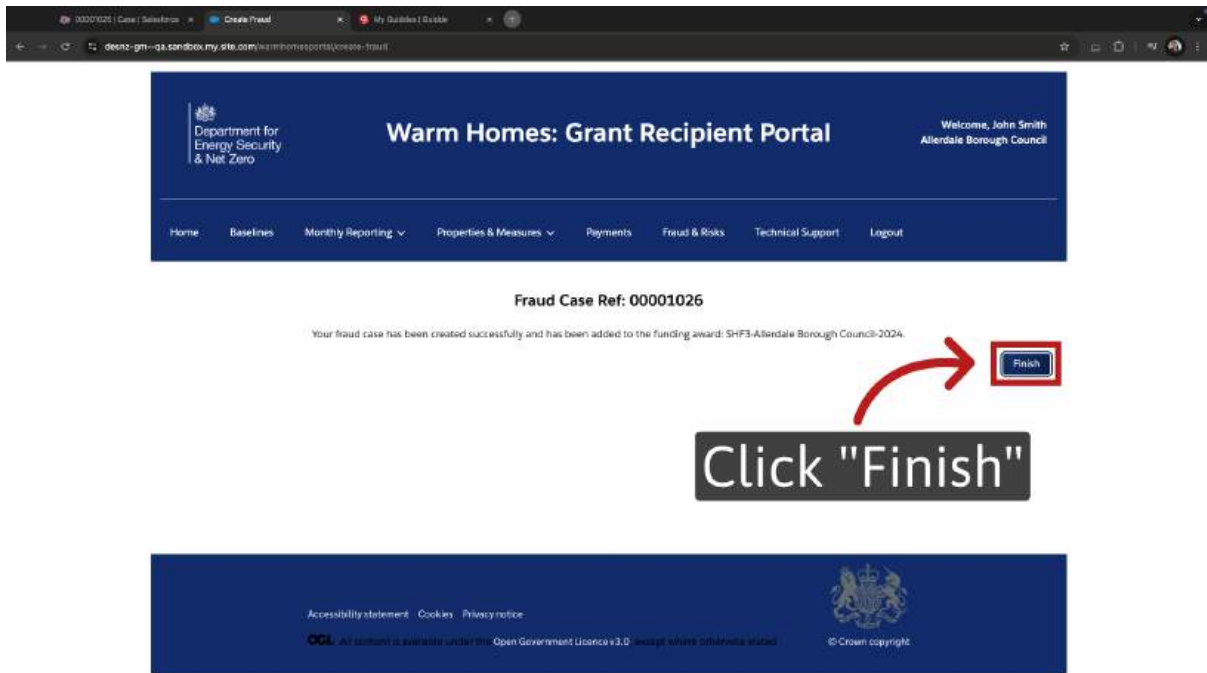
### 83. Case Reference

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

The screenshot shows the "Finish" screen of the "Create Fraud Record" process. The header and navigation bar are identical to the previous screen. The main heading is "Finish". Below this, a message states: "Your fraud case has been created successfully and has been added to the funding award: SHF3-Allerdale Borough Council-2024." A red box highlights the "Fraud Case Ref: 00001026" text, with a red arrow pointing to it. A "Finish" button is located at the bottom right. Below the main content area, there is a footer section with links for "Accessibility statement", "Cookies", and "Privacy notice". It also includes the text "OGL All content is available under the Open Government Licence v3.0, except where otherwise stated" and "© Crown copyright".

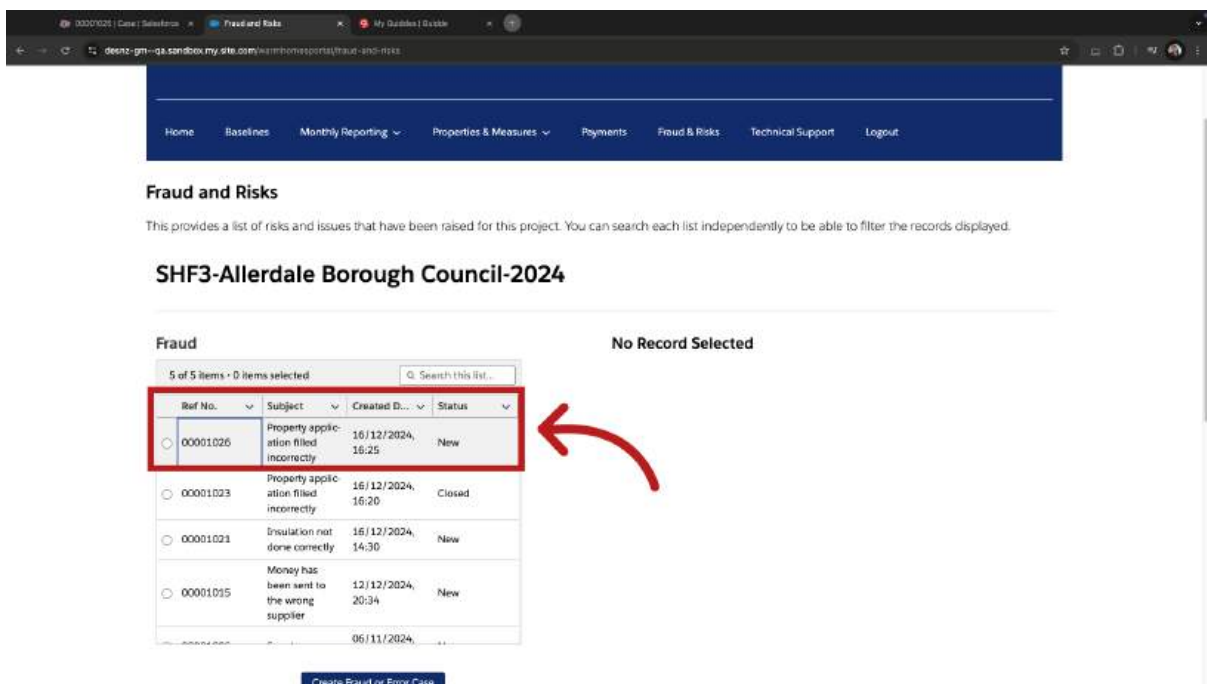
### 84. Click "Finish"

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.



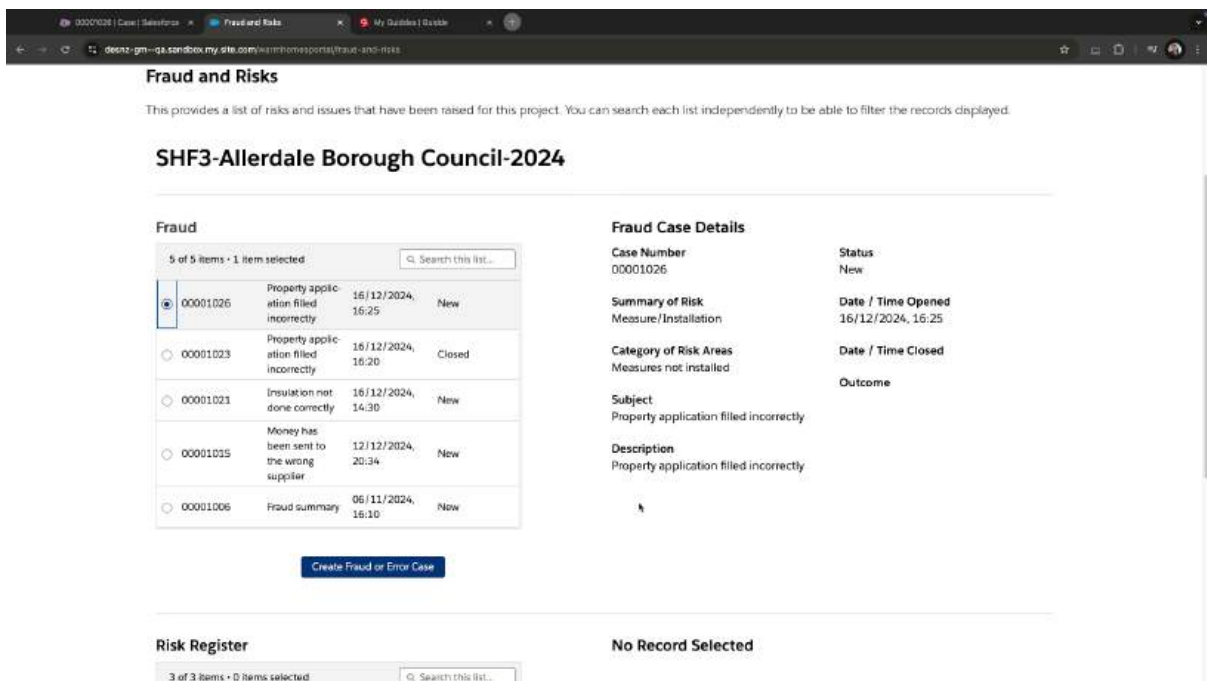
## 86. Grant Recipient: Raising Risk or Issue Cases

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

# Grant Recipient: Raising Risk or Issue Cases

## 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.



**Fraud and Risks**

This provides a list of risks and issues that have been raised for this project. You can search each list independently to be able to filter the records displayed.

**SHF3-Allerdale Borough Council-2024**

**Fraud**

5 of 5 items • 1 item selected

Case Number	Description	Date / Time	Status
00001026	Property application filled incorrectly	16/12/2024, 16:25	New
00001023	Property application filled incorrectly	16/12/2024, 16:20	Closed
00001021	Insulation not done correctly	16/12/2024, 14:30	New
00001025	Money has been sent to the wrong supplier	12/12/2024, 20:34	New
00001006	Fraud summary	06/11/2024, 16:10	New

**Fraud Case Details**

**Case Number**  
00001026

**Status**  
New

**Summary of Risk**  
Measure/Installation

**Date / Time Opened**  
16/12/2024, 16:25

**Category of Risk Areas**  
Measures not installed

**Date / Time Closed**

**Outcome**

**Subject**  
Property application filled incorrectly

**Description**  
Property application filled incorrectly

**Risk Register**

3 of 3 items • 0 items selected

No Record Selected

## 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.

00001027 | Case | Salesforce

Create Risk

My Dashboard | Back

dean2-gm-ga.sandbox.my.site.com/warmhomesportal/create-risk

Department for Energy Security & Net Zero

## Warm Homes: Grant Recipient Portal

Welcome, John Smith  
Allerdale Borough Council

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

### Create Risks and Issues Record

#### SHF3-Allerdale Borough Council-2024

Please enter details of any risks or issues related to this award. This information will help us monitor potential challenges and take appropriate actions to address them effectively.

Risk Category

- None
- Access Issues
- Asbestos
- Consumer
- Cost Inflation
- Covid-19
- Design
- Fraud
- GDPR
- Health & Safety
- New problem
- Other
- Planning
- Procurement
- Quality
- Resourcing
- Scope Changes

## 89. Click "Finish"

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

00001027 | Case | Salesforce

Create Risk

My Dashboard | Back

dean2-gm-ga.sandbox.my.site.com/warmhomesportal/create-risk

Department for Energy Security & Net Zero

## Warm Homes: Grant Recipient Portal

Welcome, John Smith  
Allerdale Borough Council

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

### Risk Case Ref: 00001027

Your Risk or Issue case has been created successfully and has been added to the funding award: SHF3-Allerdale Borough Council-2024

Finish

Click "Finish"

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## 90. Risk Register List

Case 1027 will now show on the Risk Register.

00001028 | Case | Select Case | Fraud and Risk | My Guidde | Register

desnz-grn-gs.sandbox.my.site.com/waterhomesportal/traut-and-risks

Incorrectly

<input type="radio"/>	00001023	Property application filled incorrectly	16/12/2024, 16:20	Closed
<input type="radio"/>	00001021	Insulation not done correctly	16/12/2024, 14:30	New
<input type="radio"/>	00001015	Money has been sent to the wrong supplier	12/12/2024, 20:34	New
			06/11/2024	

Create Fraud or Error Case

Risk Register

4 of 4 Items • 0 Items selected

Search this list...

Ref No.	Case Read...	Created B...	Status	
<input type="radio"/>	00001027	Weather	16/12/2024, 16:26	New
<input type="radio"/>	00001024	Weather	16/12/2024, 16:22	Closed
<input type="radio"/>	00001016	Weather	12/12/2024, 20:41	New
<input type="radio"/>	00001005		06/11/2024, 16:09	New

Create New Risk or Issue

No Record 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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