



RISE

Retrofit information,
support & expertise

Warm Homes: Frequently Asked Questions

Webinar briefings WHLG – Reporting

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www.riseretrofit.org.uk





Introduction

The below provides a summary of eligible questions which were asked during a Warm Homes: Local Grant (WHLG) webinar briefing carried out in July 2025. The webinar and these questions both relate to the scheme's WHLG reporting system and answers have been provided by the Department for Energy Security and Net Zero (DESNZ).

The last update was on Tuesday 9 September.

Access and user management

**Can multiple users from the same Grant Recipient organisation access the portal?
If I wanted to request access for new users, and what should I do?**

Yes, the portal can have multiple users/logins within the Grant Recipient organisation or consortium. Please email WHLG@energysecurity.gov.uk if you would like more users added to the service and we will review your request. Please include the full name, email address and job role of the person you would like added to the portal to help process your request.

Can submissions be edited after they are uploaded?

Yes, submissions can be edited after they have been uploaded onto the portal, however this should be done before the reporting deadline on the **10th working day** of the month.

Reporting and data entry


Will a reporting template be provided to support monthly submissions?

To support Grant Recipient's to complete their monthly report DESNZ has published a Data Dictionary on gov.uk. You can access the document [here](#).

What information must be entered into the portal after a property installation is completed?

All information on the completed property should pull through to the system via the Trustmark API. GRs will be required to add measure costs, as this is not lodged on Trustmark.

Is post-EPC data uploaded automatically or entered manually?



Homes can be reported from the beginning of the process with "homes approached" in the "summary" section before surveys are completed. In the "Home Actuals" section GRs can then add the homes surveyed, validated, that have started/ completed installations.

When can properties be reported—before or after retrofit assessments?

Homes can be reported from the beginning of the process with "homes approached" in the "summary" section before surveys are completed. In the "Home Actuals" section GRs can then add the homes surveyed, validated, that have started/ completed installations.

What does the “status” field represent in the portal?

Status refers to where in the process the house is - KPI1 (Validated) through to KPI5 (Completed).

What does “validated” mean in the context of reporting?

The number of validated homes (dwelling and household are eligible to receive measures) that have signed up to receive measures within the 1-month period.

Roles and responsibilities

Who is responsible for completing the monthly report—the Local Authority or the contractor?

The GR may choose to delegate this activity but must retain oversight. The Grant Recipient is responsible for the performance, quality of output/deliverables, liabilities and relationship management of any of its contractors or its other third parties (including any consortium members or Net Zero Hub members where applicable).

How should data be collected from contractors to support reporting? Is there a contractor-facing template available?

A data dictionary, which details the data fields required for the monthly reports, is available to all GRs and their delivery partners via gov.uk. The monthly report should be submitted using the online Grant Recipient Portal. The way in which data is collected from contractors and third parties to provide within the monthly report is ultimately a decision for the GR.

Who is responsible for entering KPIs such as the proposed programme into the portal?

The forecast data for the three financial years of the scheme (presented as part of the DAC process) will be added to the system by DESNZ. GRs will then report actuals against these forecasts on a monthly basis.

Training and support

Will training materials remain available throughout the scheme?

Training materials to support GRs with monthly reporting will be available throughout the scheme via gov.uk and RISE. DESNZ and its delivery partners will continue to gather feedback from GRs on the training and support that would be most helpful as we move through the scheme.

Is there a way to provide feedback on the portal's usability?

Please use this dedicated form from DESNZ to provide any feedback on the portal (<https://forms.office.com/Pages/ResponsePage.aspx?id=BXCSy8EC60O0I-ZJLRst2JPvV6tCZldDpQ29DBgaBclUM0M2UTRRTjk4NUpVTU1SRIRFQ1VIMUY3MS4u>).

Project and activity management

How can we pause applications on the Government Portal if we've exceeded our target?

This is currently being explored by DESNZ. Please contact WHLG@energysecurity.gov.uk.

What should we report if no fraud has occurred?

As part of monthly reporting you will be asked to create a Fraud and Error report. Here you can also declare that no Fraud and Error for the reporting period.

Are timesheets still required, and what should they include?

Timesheets are not mandatory for WHLG, but GRs are welcome to create and use them if they choose.

WHLG Roundtable FAQs

What does RISE support look like for LAs within a consortium?

In principle, RISE support is channelled through the consortium lead. However, the aim of the RISE support is to help remove barriers and unlock delivery. We will therefore work on a case-by-case basis with consortium members as well, should that be required.

Could RISE assist GRs with a WH/PAS specification template for procurement?

RISE support does not include any legal, financial, or commercial advice. We are therefore not able to provide any (procurement) specification templates.

Will we have the same DSM for the duration of the scheme?

The relationship between DSM and Grant Recipient is an important one, and where possible, we will aim to keep that relationship in place for the duration of our contract. Should circumstances require a change of DSM, we have a full shadowing and handover process in place to ensure that the transition will be as seamless as possible.

Does being part of a consortium change if we get direct support from RISE?

Yes – RISE support is channelled through the lead Grant Recipient (GR). Consortium members can receive support via their lead if it's requested.

Who is my DSM?

Local Grant GRs, please email whlg@turntown.co.uk

Social Housing Fund GRs, please email whshf@turntown.co.uk

Our team will then let you know who your DSM is.



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