

[ABS007.1: Batch Management: Creating & Submitting a Batch \(GRL/CM\)](#)

[Click here to watch](#)



Batch Management: Creating & Submitting a Batch (GRL/CM). // This mini- guide will outline how to create and edit a draft batch in the Grant Recipient portal, applicable to both Consortium Members and Leads.

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. The Batch Summary Page

The Batch Summary Page. //The batch summary page is where you'll find a comprehensive overview of the batches associated with your award.

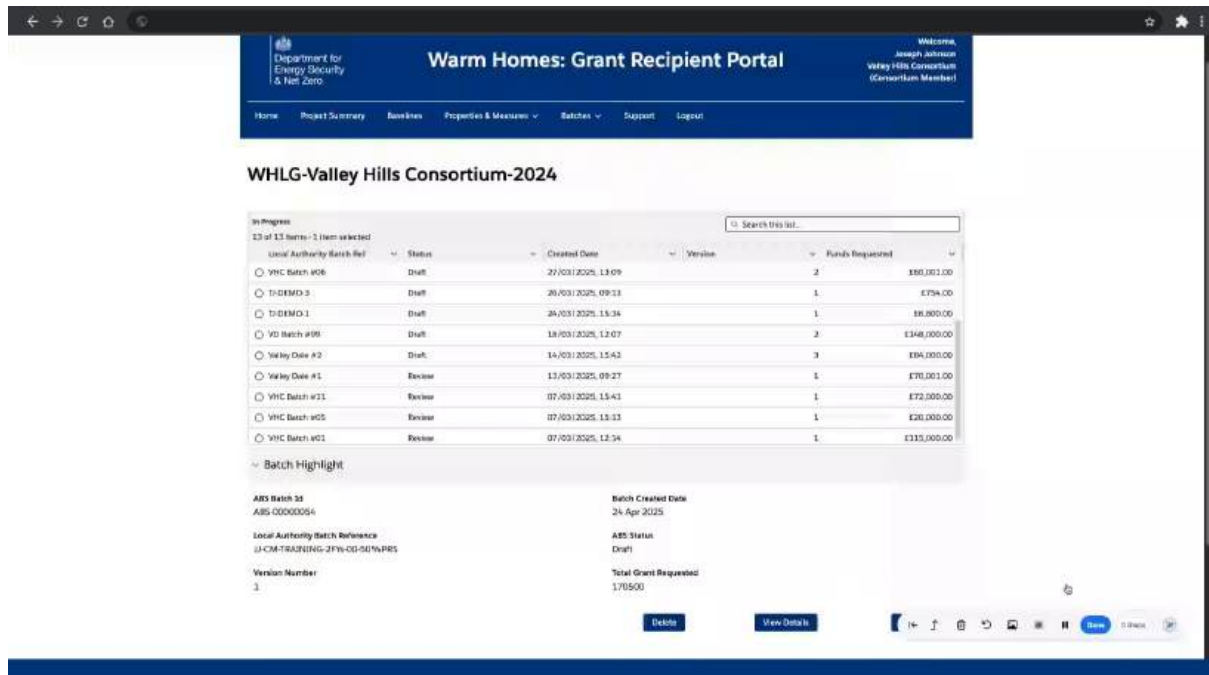


The Batch Summary Page

3. Summary page overview

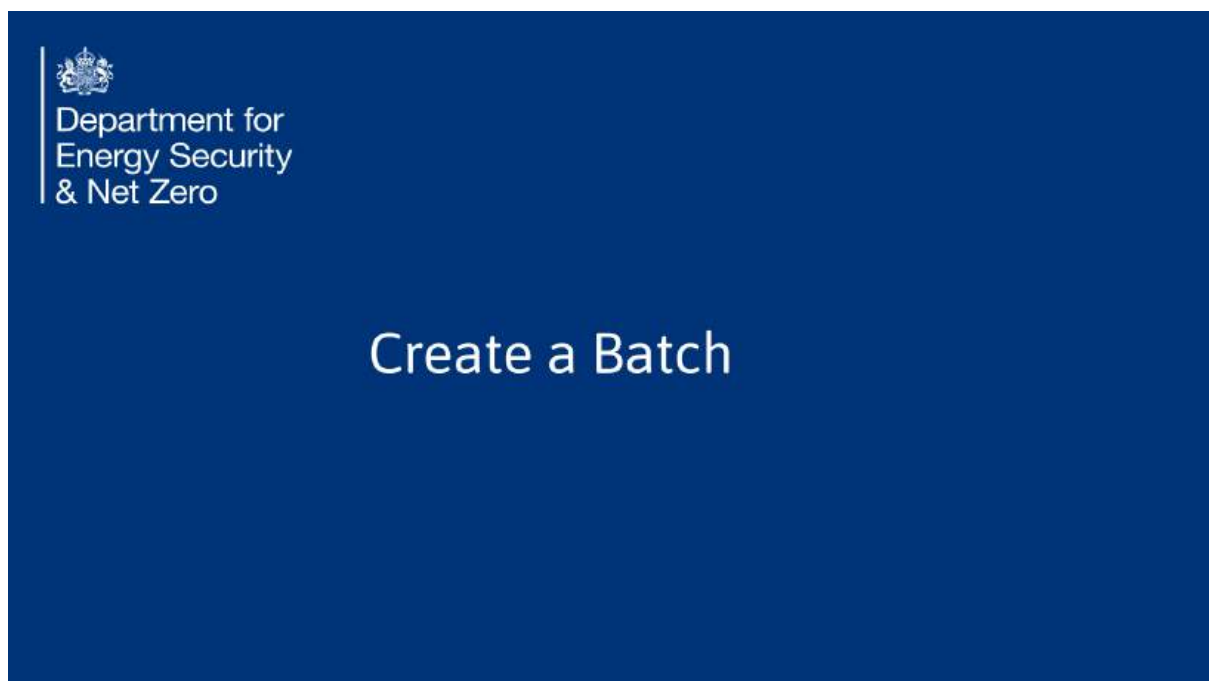
Simply navigate to the "Batches" tab and then select the "Summary" tab. This page presents essential information, including the Baseline Total Grant Spends per

financial year; the total grant amount awarded so far' the number of batches in all statuses; and the number of homes by fuel and tenure type, to name a few.



4. Create a Batch

Let's create a batch.



5. Click "Create Batch"

On the Summary page, there is a "Create a Batch" button that you can select

Types	Number of Homes	% of Total Homes	Average Spend
Owner Occupied	26	28.26%	£13,653.05
Private Rented Fully Funded	0	0%	£0.00
Private Rented 50% Funded	2	2.17%	£7,500.00
Social Housing 50% Funded	0	0%	£0.00

Low Carbon Heating

Types	Number of Homes	% of Total Homes	Average Spend
Owner Occupied	33	35.87%	£30,303.03
Private Rented Fully Funded	0	0%	£0.00
Private Rented 50% Funded	0	0%	£0.00
Social Housing 50% Funded	31	33.7%	£2,645.16

Measures

Measure Type Name	Measure Price Limit	Average Spend	Difference
Cavity Wall Insulation		£5,361.29	122.89%
Pipes and valves		£5,000.00	
Air Source Heat Pump		£9,000.00	300%
Biomass		£5,000.00	107.14%
Drill digging		£5,366.87	
Wind Turbines		£5,000.00	214.29%
Wind Turbines		£5,000.00	

Click "Create Batch"

Create Batch

6. Click "Batches"

alternatively, you can navigate straight from the batches tab to the "Create" button.

Warm Homes: Grant Recipient Portal

Home Project Summary Batches **Batches** Support Logout

WHLG-Valley Hills Consortium-2024

Click "Batches"

Local Authority Batch Ref	Status	Created Date	Version	Funds Requested
WHC Batch #06	Draft	27/03/2025, 13:09	2	£60,001.00
T3-DEMO-3	Draft	26/03/2025, 09:13	1	£754.00
T3-DEMO-1	Draft	24/03/2025, 13:34	1	£6,800.00
VD Batch #99	Draft	15/03/2025, 12:07	2	£346,000.00
Valley Dale #2	Draft	14/03/2025, 15:43	3	£84,000.00
Valley Dale #1	Review	13/03/2025, 09:27	1	£70,001.00
WHC Batch #11	Review	07/03/2025, 15:41	1	£72,000.00
WHC Batch #05	Review	07/03/2025, 15:23	1	£20,000.00
WHC Batch #01	Review	07/03/2025, 12:34	1	£110,000.00

Batch Highlight

ABS Batch 04
ABS-000000054

Local Authority Batch Reference
J1-CM-TRAINING-2FY-00-00%PR5

Version Number
1

Batch Created Date
24 Apr 2025

ABS Status
Draft

Total Grant Requested
1,70500

Create Batch

7. Enter the reference number for this batch.

The first thing you'll do is enter your unique Local Authority batch reference so that you can identify this batch against your own records.

1 & Not zero Consortium Member

Enter the reference number for this batch.

WHLG-Valley Hills Consortium-2024 [Return to Batch Summary](#)

Create Batch

Local Authority Batch Reference

Person responsible for Batch Creation

Name: Joseph Johnson
Phone: 07383761772
Email: joseph.johnson@digitalmod.uk.com

Grant Recipient responsible for Batch Submission

Name: Valley Hills Consortium
Phone:

Batch Declarations

1A. The lead Grant Recipient (GR) affirms that all houses submitted as part of this batch have received retrofit assessments and a medium-term improvement plan from a retrofit coordinator. The GR will also ensure that a PAS2239 Report is created by the retrofit team in the Trustmark Data Warehouse for all houses approved as part of this batch within 4 weeks of the batch approval date, and that all improvements are completed within 8 weeks of the works being completed for the household.

1B. The lead GR affirms that all houses submitted as part of this batch have consented to receive measures.

1C. If this batch includes private rented (PRR) homes, the lead GR confirms that the landlords for each PRR home have completed the required PRR Form and the lead GR has received confirmation from the delivery partner as to whether the landlord of each home is eligible for 100% funding, or 50% funding only.

1D. The lead GR affirms that the batch meets the scheme's desired EPC standards to improve homes to EPC band C where possible, or where this target is not possible take a val and strategic approach. The lead GR confirms that homes already treated under a previous LAD or HMO phase will meet the stated requirements of being improved to EPC band C and will carbon heat as a condition of receiving WHLG funding.

All forms submitted as part of WHLG should agree to reach EPC C and this should be considered when developing retrofit assessments. This is a requirement, unless the home received approval through the LAD.

8. Click "I Agree"

Agree to the terms and conditions. This page is exclusively available when you create a new batch, not during the editing process. This is one of the main differences between creating a batch from scratch and editing a draft batch.

Department for Energy Security & Net Zero

Warm Homes: Grant Recipient Portal

Welcome, Joseph Johnson
Valley Hills Consortium
Consortium Member

Home Project Summary Basics Properties & Measures Batches Support Logout

WHLG-Valley Hills Consortium-2024 [Return to Batch Summary](#)

Create Batch

Local Authority Batch Reference

Person responsible for Batch Creation

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Phone: 07383761772
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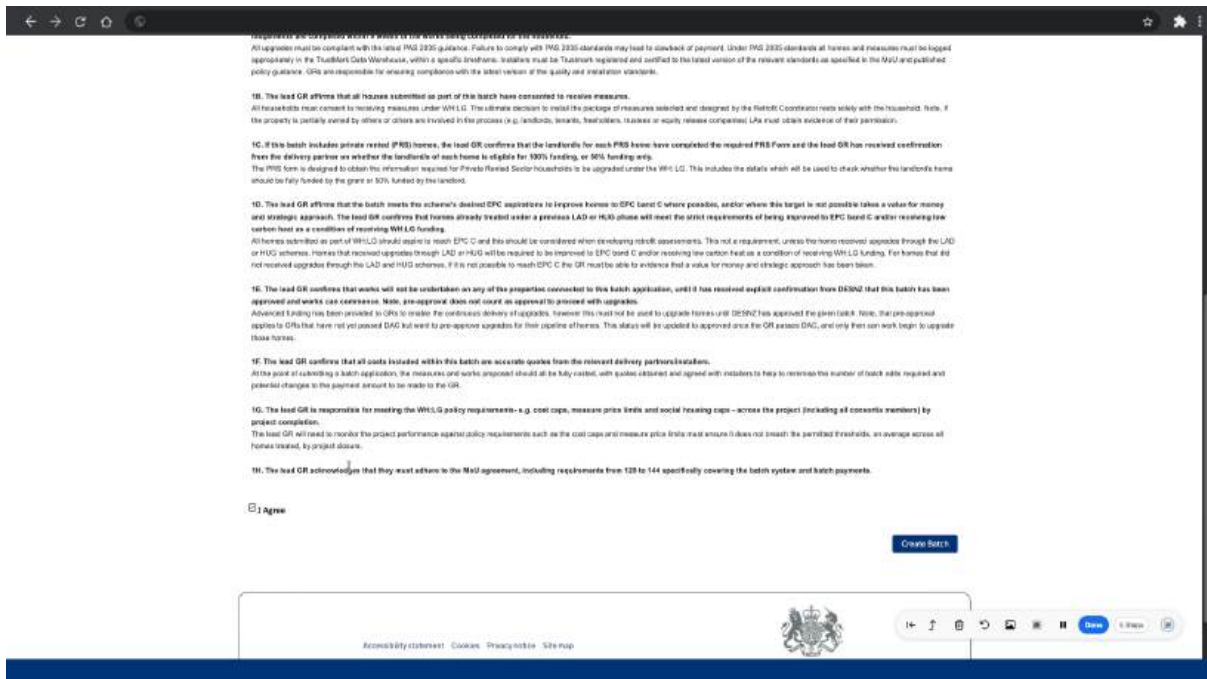
1B. The lead GR affirms that all houses submitted as part of this batch have consented to receive measures.

1C. If this batch includes private rented (PRR) homes, the lead GR confirms that the landlords for each PRR home have completed the required PRR Form and the lead GR has received confirmation from the delivery partner as to whether the landlord of each home is eligible for 100% funding, or 50% funding only.

The PRR form is designed to capture the information required for Private Rented Sector households to be supported under the WHG LAD. This includes the details which will be used to check whether the landlords home

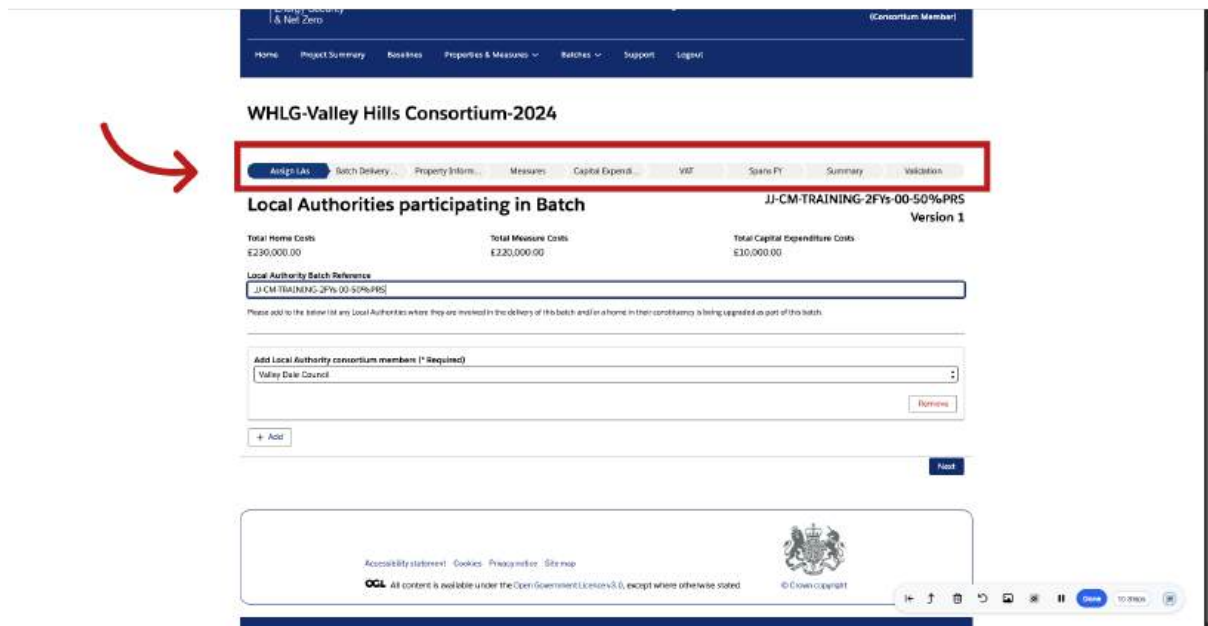
9. Editing a Batch

To cover all bases, this video will take you through an existing batch. First, we'll head over to the "Batches" tab. Select "draft" and look for the batch record that you need, and select "edit".



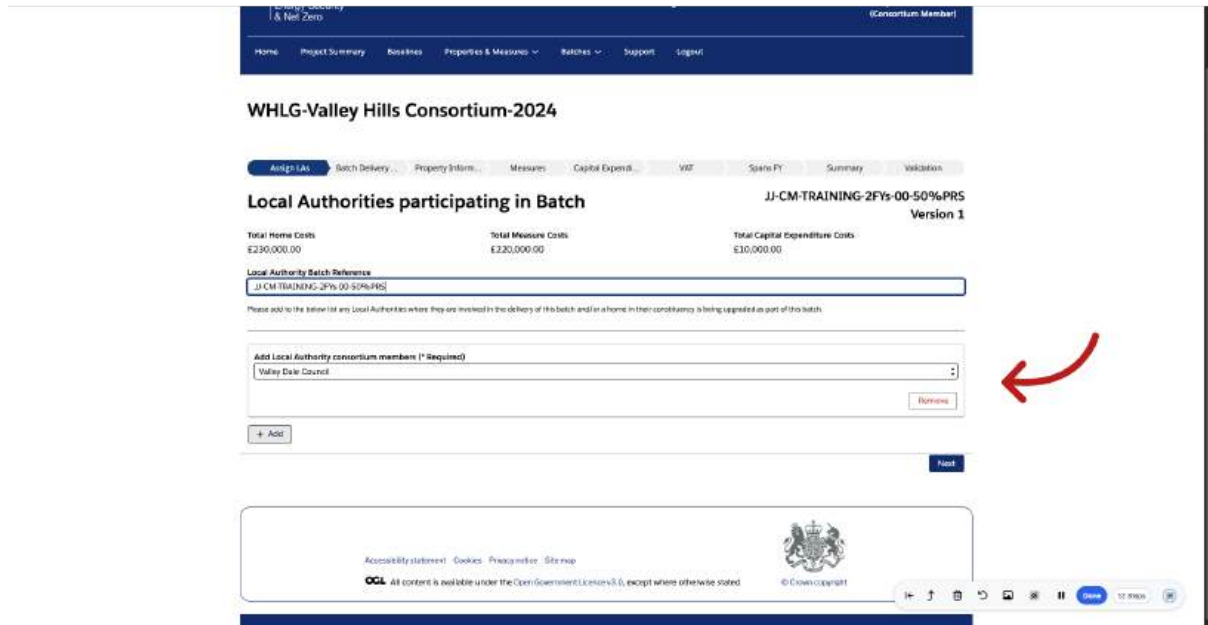
10. Know where you are in the form

Now its time to get to the details. // Helpfully, there is a pathway at the top of the screen that let's you know where you are within the form at any time. Once you've completed a section, it will turn green.



11. Click "LAsOnBatch"

On this page, you can identify the local authorities involved in the batch. You have the option to include your own local authority or create the batch on behalf of another authority.

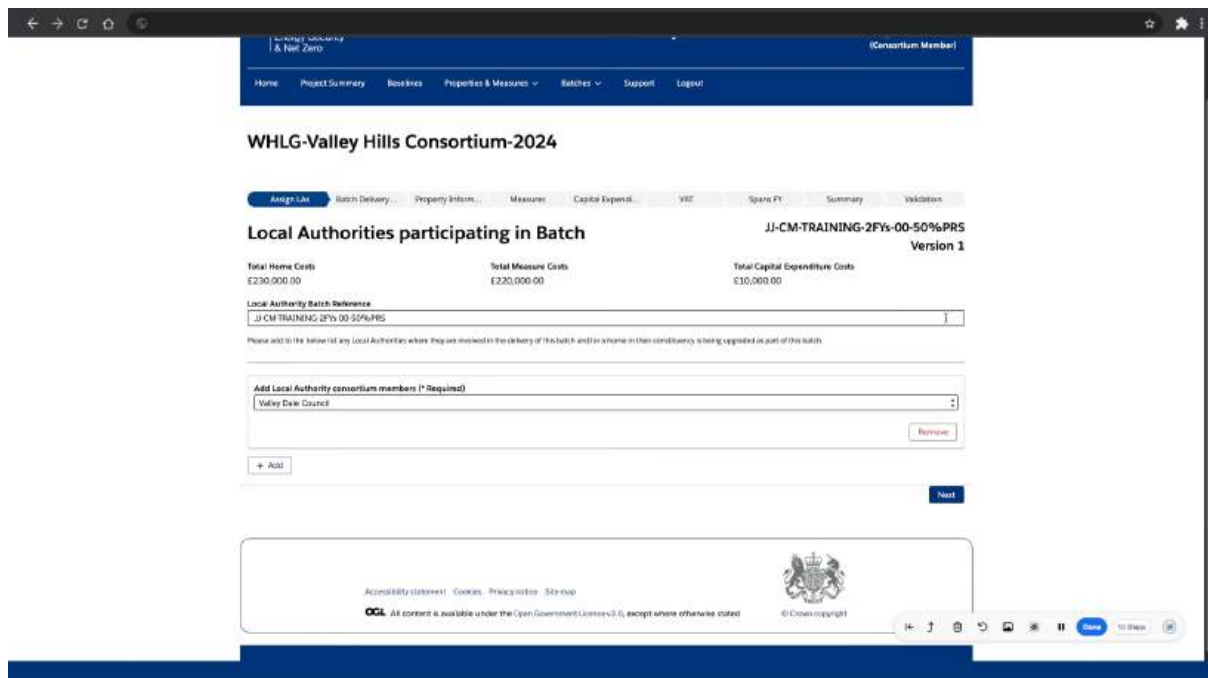


The screenshot displays the 'Local Authorities participating in Batch' page for the WHLG-Valley Hills Consortium-2024. The page header includes navigation links: Home, Project Summary, Bookings, Properties & Measures, Batches, Support, and Logout. The main content area shows the following details:

- Local Authorities participating in Batch:** JJ-CM-TRAINING-2FYs-00-50%PRs, Version 1
- Costs Summary:**
 - Total Home Costs: £230,000.00
 - Total Measure Costs: £220,000.00
 - Total Capital Expenditure Costs: £10,000.00
- Local Authority Batch Reference:** JJ-CM-TRAINING-2FYs-00-50%PRs
- Local Authorities List:** Valley Dale Council (with a red arrow pointing to the 'Remove' button)
- Buttons:** '+ Add' and 'Print'

12. Add and Remove

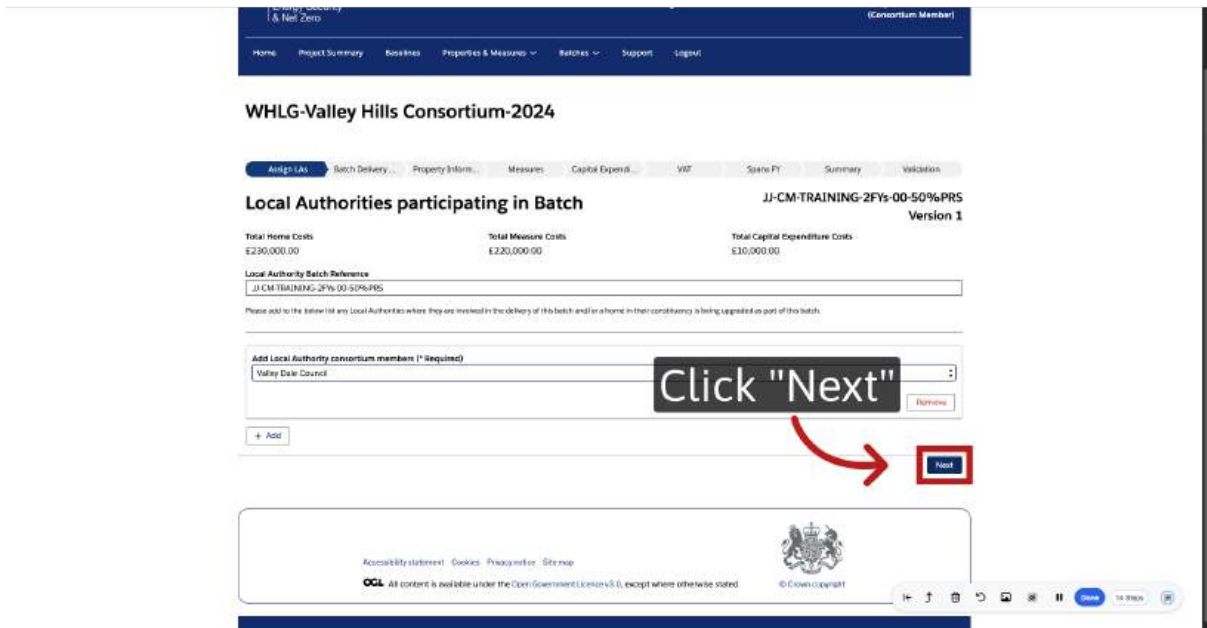
To add or remove local authorities, simply select the "+ Add" or "Remove" buttons.



This screenshot is identical to the one above, showing the 'Local Authorities participating in Batch' page. It highlights the '+ Add' and 'Remove' buttons used for managing the list of local authorities. The page layout and content are consistent with the previous image.

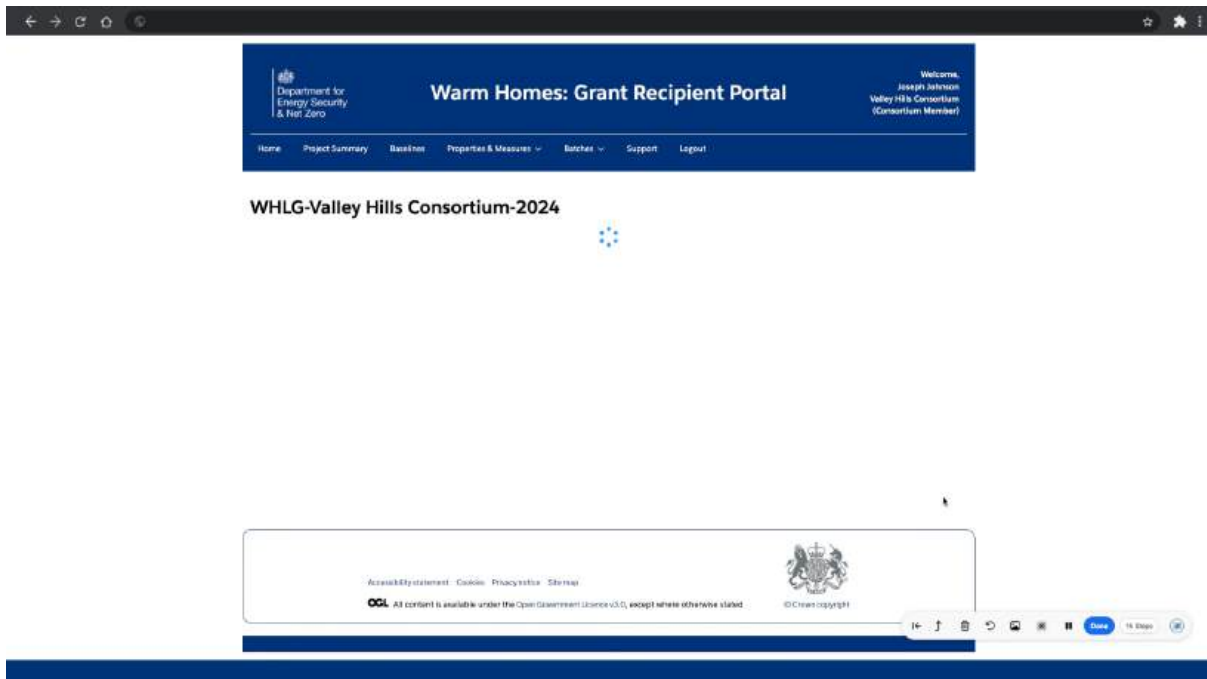
13. Click "Next"

Proceed to the subsequent step.



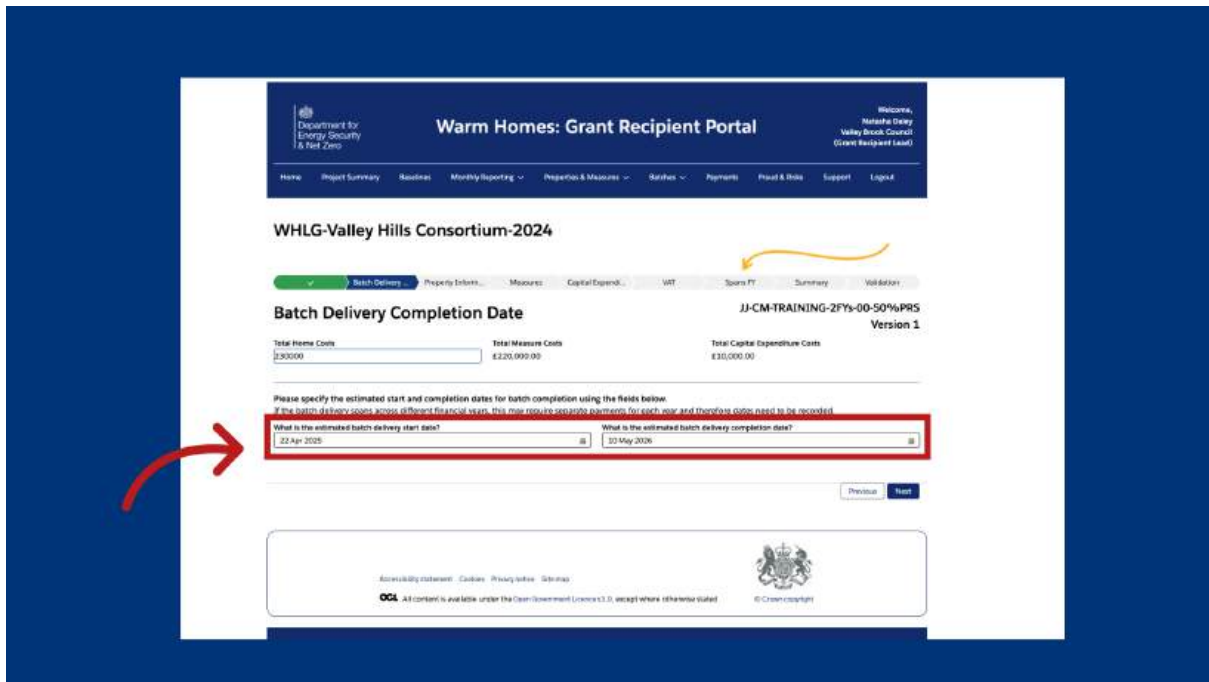
14. Batch Delivery Dates

Next up is inputting the estimated start and completion dates for the batch.



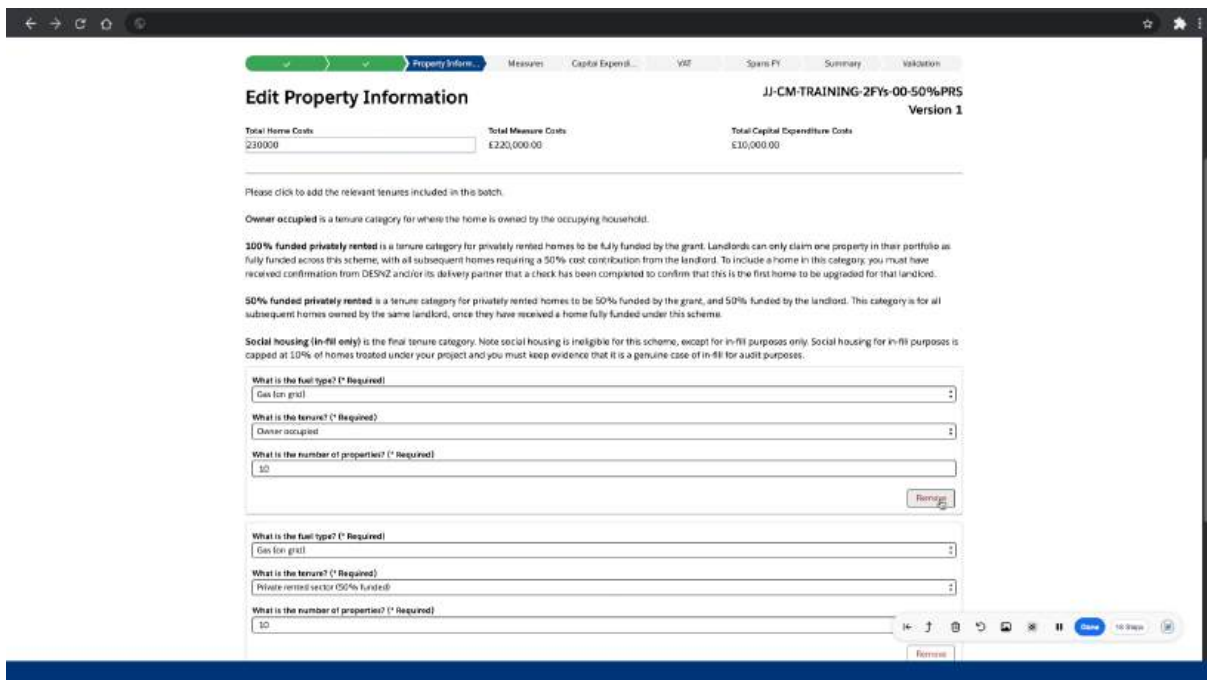
15. Batch Delivery Dates - 2 FYs

Note that if the inputted dates span across more than one year- end, an extra page will become visible later on in the form. In this example, the dates span over two financial years. More on that later, when that page is reviewed. Select "next".



16. Property Information Overview

This is where you will enter property information, choose which tenure and fuel types are relevant for this batch. // A reminder that the "100% funded private rented" option is only for the first home for a given landlord.



17. Click here

In this example, we have 10 properties occupied by homeowners and 10 properties which are 50% privately funded, with both categories reliant on grid-supplied gas. //

Enter Property Information Version 1

Total Home Costs	Total Measure Costs	Total Capital Expenditure Costs
£230,000.00	£230,000.00	£10,000.00

Please click to add the relevant tenures included in this batch.

Owner occupied is a tenure category for where the home is owned by the occupying household.

100% funded privately rented is a tenure category for privately rented homes to be fully funded by the grant. Landlords can only claim one property in their portfolio as fully funded across this scheme, with all subsequent homes requiring a 50% cost contribution from the landlord. To include a home in this category, you must have received confirmation from DESNZ and/or its delivery partner that a check has been completed to confirm that this is the first home to be upgraded for that landlord.

50% funded privately rented is a tenure category for privately rented homes to be 50% funded by the grant, and 50% funded by the landlord. This category is for all subsequent homes owned by the same landlord, once they have received a home fully funded under this scheme.

Social housing (in-fill only) is the final tenure category. Note social housing is ineligible for this scheme, except for in-fill purposes only. Social housing for in-fill purposes is capped at 10% of homes treated under your project and you must keep evidence that it is a genuine case of in-fill for audit purposes.

What is the fuel type? (* Required)

Gas (on grid)

What is the tenure? (* Required)

Owner occupied

What is the number of properties? (* Required)

10

Remove

What is the fuel type? (* Required)

Gas (on grid)

What is the tenure? (* Required)

Private rented sector (50% funded)

What is the number of properties? (* Required)

10

Remove

↖

[Previous](#) [Reset Property Information](#) [Next](#)

18. Click "Reset Property Information"

If you'd like to start again from scratch, this is easily done by selecting the "Reset Property Information" button. This is really useful when there are many different entries to remove.

Please click to add the relevant tenures included in this batch.

Owner occupied is a tenure category for where the home is owned by the occupying household.

100% funded privately rented is a tenure category for privately rented homes to be fully funded by the grant. Landlords can only claim one property in their portfolio as fully funded across this scheme, with all subsequent homes requiring a 50% cost contribution from the landlord. To include a home in this category, you must have received confirmation from DESNZ and/or its delivery partner that a check has been completed to confirm that this is the first home to be upgraded for that landlord.

50% funded privately rented is a tenure category for privately rented homes to be 50% funded by the grant, and 50% funded by the landlord. This category is for all subsequent homes owned by the same landlord, once they have received a home fully funded under this scheme.

Social housing (in-fill only) is the final tenure category. Note social housing is ineligible for this scheme, except for in-fill purposes only. Social housing for in-fill purposes is capped at 10% of homes treated under your project and you must keep evidence that it is a genuine case of in-fill for audit purposes.

What is the fuel type? (* Required)

Gas (on grid)

What is the tenure? (* Required)

Owner occupied

What is the number of properties? (* Required)

10

Remove

What is the fuel type? (* Required)

Gas (on grid)

What is the tenure? (* Required)

Private rented sector (50% funded)

What is the number of properties? (* Required)

10

Remove

Click "Reset Property Information"

[Previous](#) [Reset Property Information](#) [Next](#)

19. Reset Property Info

Before any items are removed, you will receive a confirmation prompt to ensure your decision. For now, let's cancel this action since we don't wish to proceed.

The screenshot shows a web browser window displaying a form titled "Reset Property Information". The form contains two identical sections for adding property information. Each section includes a dropdown menu for "What is the fuel type? (* Required)" with "Gas (on grid)" selected, another dropdown for "What is the tenure? (* Required)" with "Owner occupied" selected, and a text input field for "What is the number of properties? (* Required)" with "10" entered. Below each section is a "Remove" button. At the bottom of the form, there are three buttons: "Add", "Previous", and "Next". The "Next" button is highlighted with a red box. The browser's address bar shows the URL "https://www.gov.uk/government/consultations/energy-efficiency-grant-scheme-for-private-rented-properties".

20. Click "Next"

Advance to the following step.

This screenshot is identical to the previous one, but with a red arrow pointing from a black box containing the text "Click 'Next'" to the "Next" button, which is now highlighted with a red box. The form content and layout are the same as in the previous screenshot.

21. Add Projected Expenditure for the Homes

Add Projected Expenditure for the Homes



22. Spend per Home- Owner Occupied

The form now features a dedicated page designed for the entry of projected expenditures. Each tenure type chosen prior is represented on a separate page - the first here is for owner occupied homes. The pages are organized into two distinct pots: energy efficiency and low carbon heat.

Spend Per Home - Owner Occupied JJ-CM-TRAINING-2FYs-00-50%PRS Version 1

Total Home Costs (will update on next screen) £230,000.00
Total Measure Costs £230,000.00
Total Capital Expenditure Costs £10,000.00

Home count of tenure Owner Occupied: 20
Please input the cost details for these homes (please use 0 if appropriate)

Energy Performance Pot

What is the number of Owner Occupied homes activating their energy performance pot of funding within this batch (i.e. receiving energy performance measures)? (* Required) 20
What is the total grant funding for the energy performance pot for these Owner Occupied homes? (* Required) £115,000

Energy Performance Cost Cap (averaged across project): £15,000.00
Average grant spend of energy performance pot for Owner Occupied homes within batch: £11,500.00
Average grant spend of energy performance pot for all approved Owner Occupied homes to date + homes in current batch: £13,065.56

Low Carbon Heat Pot

What is the number of Owner Occupied homes activating their low carbon heat pot of funding within this batch (i.e. receiving low carbon heat measures)? (* Required) 0
What is the total grant funding for the low carbon heat pot for these Owner Occupied homes? (* Required) £0

Low Carbon Heat Cost Cap (averaged across project): £15,000.00
Average grant spend of low carbon heat pot for Owner Occupied homes within batch: £0.00
Average grant spend of low carbon heat for all approved Owner Occupied homes to date + homes in current batch: £0.00

23. Number of Homes - Read only

To help you recall the number of homes in that tenure type, entered on the previous pages, the system will display the total number of homes at the top of the screen.

24. 10 homes, £115k

Here we have reported that 10 owner occupied homes will need funding of £115,000 from the energy performance pot. Each home spend averaging £11,500. // The system automatically calculates this amount for the current batch, as well as for all approved batches to date. In our example, the amount is below the cost cap, which is shown on screen. //

25. Homes Exceeded Validation Error

If the number of homes entered exceeds the amount specified on the previous page, a red validation error will appear when you click 'Next.' Red Error validations mean that you cannot submit this batch without resolving it.

The screenshot shows a web application interface for 'Spending Per Home - Owner Occupied'. The page title is 'Spending Per Home - Owner Occupied' and the project is 'JJ-CM-TRAINING-2FYs-00-50%PRS Version 1'. The page is divided into several sections:

- Summary:** Total Home Costs (will update on next screen) £230,000.00, Total Measure Costs £220,000.00, Total Capital Expenditure Costs £10,000.00.
- Home count of tenure Owner Occupied:** 30. Below this, a prompt asks to 'Please input the cost details for these homes (please use 0 if appropriate)'.
- Energy Performance Section:**
 - Question: 'What is the number of Owner Occupied homes activating their energy performance pot of funding within this batch (i.e. receiving energy performance measures)? (* Required)'. Answer: 30.
 - Question: 'What is the total grant funding for the energy performance pot for these Owner Occupied homes? (* Required)'. Answer: £115,000.
 - Energy Performance Cost Cap (leveraged across project): £15,000.00.
 - Average grant spend of energy performance pot for Owner Occupied homes within batch: £11,500.00.
 - Average grant spend of energy performance pot for all approved Owner Occupied homes to date + homes in current batch: £13,055.56.
- Low Carbon Heat Section:**
 - Question: 'What is the number of Owner Occupied homes activating their low carbon heat pot of funding within this batch (i.e. receiving low carbon heat measures)? (* Required)'. Answer: 0.
 - Question: 'What is the total grant funding for the low carbon heat pot for these Owner Occupied? (* Required)'. Answer: £0.
 - Low Carbon Heat Cost Cap (leveraged across project): £15,000.00.
 - Average grant spend of low carbon heat pot for Owner Occupied homes within batch: £0.00.
 - Average grant spend of low carbon heat for all approved Owner Occupied homes to date + homes in current batch: £0.00.

At the bottom right, there is a 'Next' button and a '20 Steps' indicator.

26. Show Cost Cap Warning Validation Error

If you exceed the cost cap amount, as demonstrated here, the system will issue a warning before you proceed to the next step. However, you will still be able to submit the batch. This flexibility is intentional, as the cost cap must be met on average by the time the project concludes.

£230,000.00 £220,000.00 £10,000.00

Home count of tenure Owner Occupied:
10

Please input the cost details for these homes (please use 0 if appropriate)

What is the number of Owner Occupied homes activating their energy performance pot of funding within this batch i.e. receiving energy performance measures? (* Required)
21

What is the total grant funding for the energy performance pot for these Owner Occupied homes? (* Required)
£1,110,000

ERROR: The number of homes utilising the energy performance pot for Owner Occupied must be less than or equal to 10

Energy Performance Cost Cap (averaged across project): £35,000.00

Average grant spend of energy performance pot for Owner Occupied homes within batch
£54,761.90

WARNING: The average price for this tenure type within this batch exceeds the cost cap which must be met on average across the project by project closure

Average grant spend of energy performance pot for all approved Owner Occupied homes to date - homes in current batch
£32,021.28

WARNING: The cumulative average price for this tenure type to date exceeds the limit which must be met by project closure

What is the number of Owner Occupied homes activating their low carbon heat pot of funding within this batch i.e. receiving low carbon heat measures? (* Required)
0

What is the total grant funding for the low carbon heat pot for these Owner Occupied? (* Required)
£0

Low Carbon Heat Cost Cap (averaged across project): £15,000.00

Average grant spend of low carbon heat pot for Owner Occupied homes within batch
£0.00

Average grant spend of low carbon heat for all approved Owner Occupied homes to date - homes in current batch
£0.00

Previous Next

27. Owner Occupied no validations

Let's revert these numbers to their original values and eliminate the associated validations before proceeding.

CO Spend PMSO Spend Measures Capital Exp... VAT Spens FY Summary Validation

Spend Per Home - Owner Occupied JJ-CM-TRAINING-2FYs-00-50%PRS Version 1

Total Home Costs (will update on next screen) Total Measure Costs Total Capital Expenditure Costs
£300,000 £220,000.00 £10,000.00

Home count of tenure Owner Occupied:
10

Please input the cost details for these homes (please use 0 if appropriate)

What is the number of Owner Occupied homes activating their energy performance pot of funding within this batch i.e. receiving energy performance measures? (* Required)
10

What is the total grant funding for the energy performance pot for these Owner Occupied homes? (* Required)
£1,110,000

Energy Performance Cost Cap (averaged across project): £15,000.00

Average grant spend of energy performance pot for Owner Occupied homes within batch
£11,900.00

Average grant spend of energy performance pot for all approved Owner Occupied homes to date - homes in current batch
£33,055.56

What is the number of Owner Occupied homes activating their low carbon heat pot of funding within this batch i.e. receiving low carbon heat measures? (* Required)
0

What is the total grant funding for the low carbon heat pot for these Owner Occupied? (* Required)
£0

Low Carbon Heat Cost Cap (averaged across project): £15,000.00

Average grant spend of low carbon heat pot for Owner Occupied homes within batch
£0.00

Average grant spend of low carbon heat for all approved Owner Occupied homes to date - homes in current batch
£0.00

Previous Next

28. Landlord matched contributions inputted here

For this page, which shows the spend per home for private rented 50% funded homes, 10 homes have a projected spend of £57,500, and that amount is being

matched by landlord contributions. // Also note that the cost cap here is also different, at £7,500.

Landlord matched contributions entered here

Spend Per Home - Private Rented 50% Funded

JJ-CM-TRAINING-2FYs-00-50%PRS
Version 1

Total Home Costs (will update on next screen)	Total Measure Costs	Total Capital Expenditure Costs
£230,000.00	£230,000.00	£10,000.00

Home count of tenure Private Rented 50% Funded:
30

Please input the cost details for these homes (please use 0 if appropriate)

What is the number of Private Rented 50% Funded homes activating their energy performance pot of funding within this batch (i.e. receiving energy performance measures)? (* Required)
30

What is the total grant funding for the energy performance pot for these Private Rented 50% Funded homes? (* Required)
£17,500

What is the total landlord matched funding for energy performance pot for Private Rented 50% Funded homes within batch? (* Required)
£17,500

Energy Performance Cost Cap (averaged across project): £7,500.00

Average grant spend of energy performance pot for Private Rented 50% Funded homes within batch
£5,750.00

Average grant spend of energy performance pot for all approved Private Rented 50% Funded homes to date + homes in current batch
£6,041.67

What is the number of Private Rented 50% Funded homes activating their low carbon heat pot of funding within this batch (i.e. receiving low carbon heat measures)? (* Required)
0

What is the total grant funding for the low carbon heat pot for these Private Rented 50% Funded? (* Required)
£0

What is the total landlord matched funding for low carbon heat pot for Private Rented 50% Funded homes within batch? (* Required)
£0

Low Carbon Heat Cost Cap (averaged across project): £7,500.00

Average grant spend of low carbon heat pot for Private Rented 50% Funded homes within batch
£0.00

29. Landlord Matching Validation

Social housing units and privately rented homes that are 50% funded necessitate matching funding contributions from landlords. // This policy is enforced in this system. This means that the amount here has to be equal or more than the amount coming from the funding pot.// In this example, you can see just £6,000 is inputted, which flags a red error validation message.

Spend Per Home - Private Rented 50% Funded

JJ-CM-TRAINING-2FYs-00-50%PRS
Version 1

Total Home Costs (will update on next screen)	Total Measure Costs	Total Capital Expenditure Costs
£230000	£230,000.00	£10,000.00

Home count of tenure Private Rented 50% Funded:
30

Please input the cost details for these homes (please use 0 if appropriate)

What is the number of Private Rented 50% Funded homes activating their energy performance pot of funding within this batch (i.e. receiving energy performance measures)? (* Required)
30

What is the total grant funding for the energy performance pot for these Private Rented 50% Funded homes? (* Required)
£17,500

What is the total landlord matched funding for energy performance pot for Private Rented 50% Funded homes within batch? (* Required)
£6,000

ERROR: Private Rented 50% Funded Matched Landlord Funding is inadequate for this batch for the energy performance pot

Energy Performance Cost Cap (averaged across project): £7,500.00

Average grant spend of energy performance pot for Private Rented 50% Funded homes within batch
£5,750.00

Average grant spend of energy performance pot for all approved Private Rented 50% Funded homes to date + homes in current batch
£6,041.67

What is the number of Private Rented 50% Funded homes activating their low carbon heat pot of funding within this batch (i.e. receiving low carbon heat measures)? (* Required)
0

What is the total grant funding for the low carbon heat pot for these Private Rented 50% Funded? (* Required)
£0

What is the total landlord matched funding for low carbon heat pot for Private Rented 50% Funded homes within batch? (* Required)
£0

Low Carbon Heat Cost Cap (averaged across project): £7,500.00

Average grant spend of low carbon heat pot for Private Rented 50% Funded homes within batch
£0.00

30. Click "Next"

Let's rectify these numbers and move on to the next section.

The screenshot shows a form with several input fields and labels. A red arrow points from a black box containing the text "Click 'Next'" to a blue button labeled "Next" in the bottom right corner of the form area.

What is the number of Private Rented 50% Funded homes achieving their energy performance pot of funding within this batch (i.e. receiving energy performance measures)? (* Required)
10

What is the total grant funding for the energy performance pot for these Private Rented 50% Funded homes? (* Required)
£57,500

What is the total landlord matched funding for energy performance pot for Private Rented 50% Funded homes within batch? (* Required)
£57,500

Energy Performance Cost Cap (averaged across project): £7,500.00

Average grant spend of energy performance pot for Private Rented 50% Funded homes within batch
£5,750.00

Average grant spend of energy performance pot for all approved Private Rented 50% Funded homes to date - homes in current batch
£6,041.67

What is the number of Private Rented 50% Funded homes achieving their low carbon heat pot of funding within this batch (i.e. receiving low carbon heat measures)? (* Required)
0

What is the total grant funding for the low carbon heat pot for these Private Rented 50% Funded homes? (* Required)
£0

What is the total landlord matched funding for low carbon heat pot for Private Rented 50% Funded homes within batch? (* Required)
£0

Low Carbon Heat Cost Cap (averaged across project): £7,500.00

Average grant spend of low carbon heat pot for Private Rented 50% Funded homes within batch
£0.00

Average grant spend of low carbon heat for all approved Private Rented 50% Funded homes to date - homes in current batch
£0.00

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31. Running Totals

Before we dive into the next section, it's important to note that the system now displays running totals at the top of the screen. The Total Home Costs should equal to the total measure and expenditure costs combined.

The screenshot shows a navigation bar with tabs: Measures, Capital Exp., WIT, Spans FY, Summary, and Validation. Below the navigation bar is a section titled "Approved Measure Types & Spend" for project "JJ-CM-TRAINING-2FYs-00-50%PRS Version 1". A red arrow points to a table containing running totals.

Total Home Costs	Total Measure Costs (will update after Measure validation screen)	Total Capital Expenditure Costs
£230,000.00	£230,000.00	£10,000.00

Please select each of the measure types included in this batch, the total number of measures to be installed for that measure type and the total spend for that measure type.

Enter the type, total number and total spend for the measure(s) to be installed

Only the last entry for each measure type will be stored - duplicate entries each measure type will override earlier ones

Which measure type will be included in the batch
EP - Solar Thermal

What is the total number of the selected measure type to be installed?
20

What is the total spend for the selected measure type?
£200,000

Which measure type will be included in the batch
EP - Digital/Smart Controls

What is the total number of the selected measure type to be installed?
20

What is the total spend for the selected measure type?
£0

Previous Next

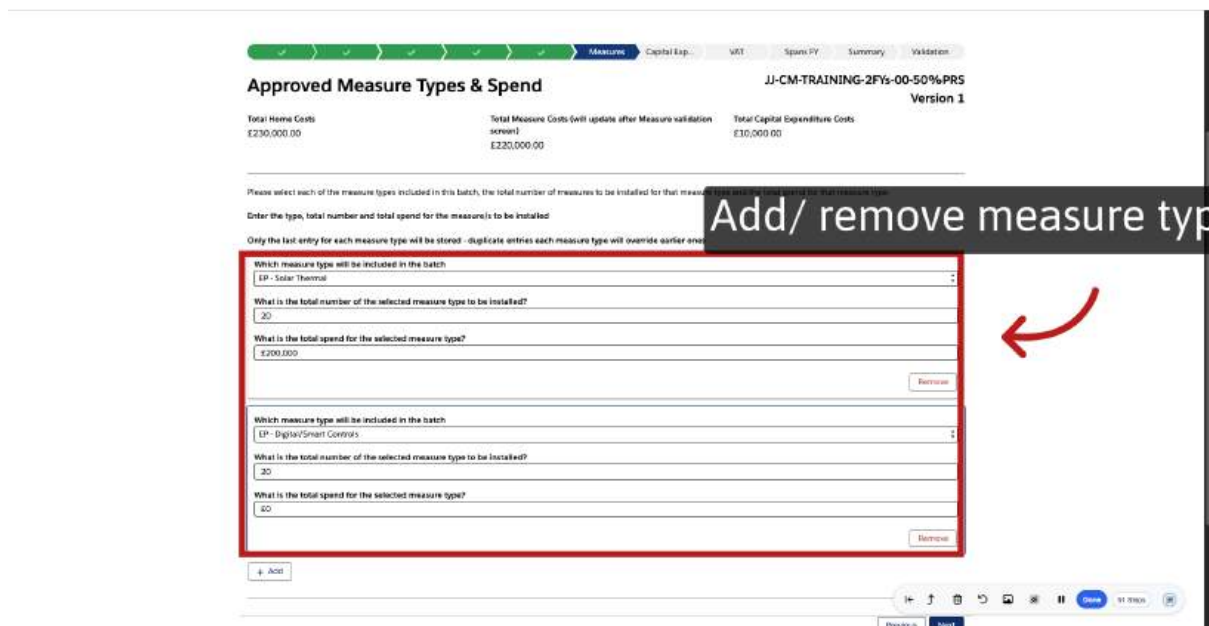
32. Projected Expenditure for Measures

Projected Expenditure for Measures.



33. Add/ remove measure types

Enter the type, total quantity, and total expenditure for each measure to be installed. After providing the necessary details, click on the '+ Add' button for each measure.



Approved Measure Types & Spend

JJ-CM-TRAINING-2FYs-00-50%PRS
Version 1

Total Home Costs £230,000.00	Total Measure Costs (will update after Measure validation screen) £220,000.00	Total Capital Expenditure Costs £10,000.00
---------------------------------	--	---

Please select each of the measure types included in this batch, the total number of measures to be installed for that measure type, and the total spend for that measure type.

Enter the type, total number and total spend for the measure(s) to be installed

Only the last entry for each measure type will be stored - duplicate entries each measure type will override earlier ones

Add/ remove measure type

Which measure type will be included in the batch?
EP - Solar Thermal

What is the total number of the selected measure type to be installed?
20

What is the total spend for the selected measure type?
£200,000

Remove

Which measure type will be included in the batch?
EP - Digital/Smart Controls

What is the total number of the selected measure type to be installed?
20

What is the total spend for the selected measure type?
£20,000

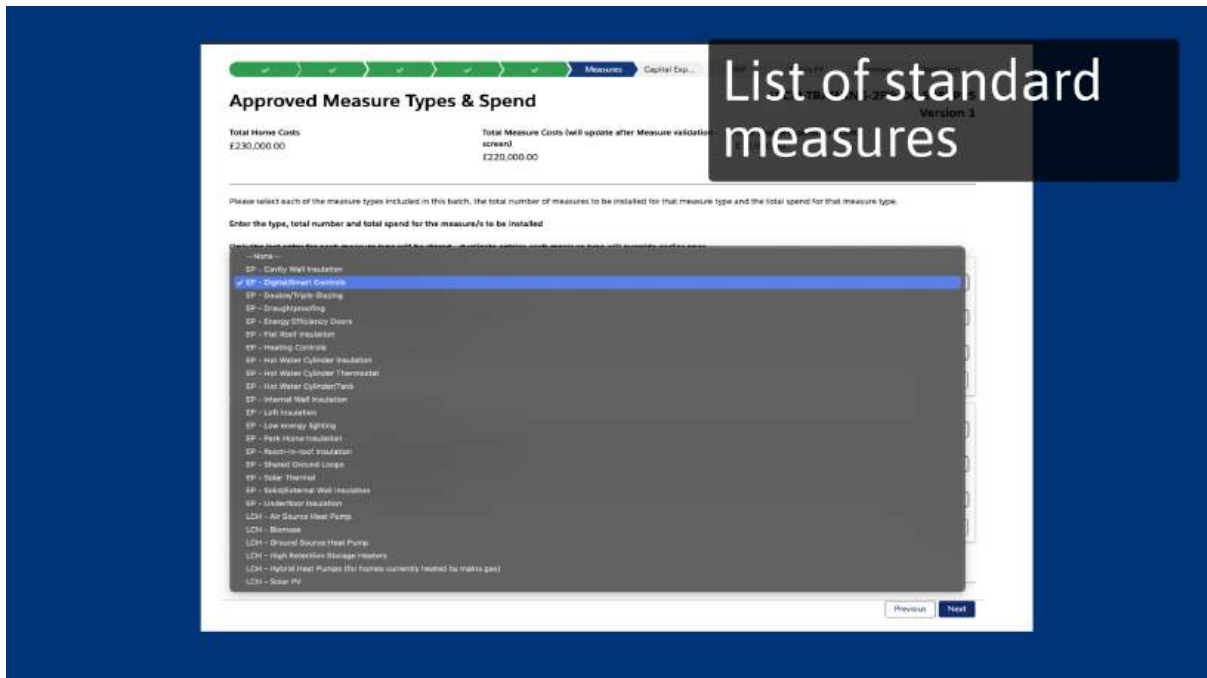
Remove

+ Add

Previous Next

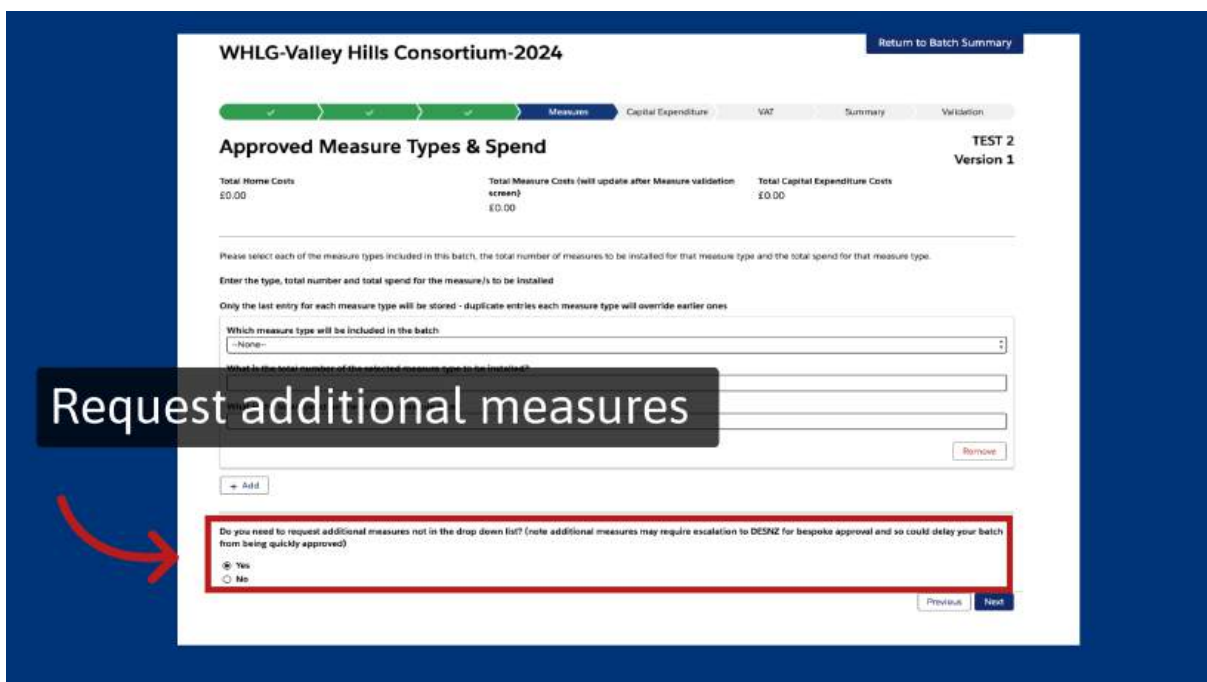
34. List of standard measures

There is a long pre-defined and pre- approved list of standard measures exists in the system for you to choose from.



35. Request additional measures

If we were creating this batch from scratch, it's at this point we would be asked whether we would like to request a custom measure to be added to the batch. Have a look on screen for what that question looks like.



36. Click "Next"

Our example batch has had "yes" already selected, which is why the question is not on the page. Let's proceed to the custom measures page.

£220,000.00

Please select each of the measure types included in this batch, the total number of measures to be installed for that measure type and the total spend for that measure type.
Enter the type, total number and total spend for the measure(s) to be installed.
Only the last entry for each measure type will be stored - duplicate entries each measure type will override earlier ones.

Which measure type will be included in the batch?
EP - Solar Thermal

What is the total number of the selected measure type to be installed?
20

What is the total spend for the selected measure type?
£200,000

Which measure type will be included in the batch?
EP - Digital/Smart Controls

What is the total number of the selected measure type to be installed?
20

What is the total spend for the selected measure type?
£0

+ Add

Click "Next"

Next

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37. Request custom measure(s)

As you can see, as an example, the requested custom measure is a boiler upgrade for 20 homes, costing £20,000 in total. // If this were a real batch, PSOs would, of course, deny this measure, as fossil fuels simply don't meet the criteria for the scheme.// You can add or remove additional measures with the "add" and "remove" buttons.

Additional Measure Types & Spend JJ-CM-TRAINING-2FYs-00-50%PRS
Version 1

Total Home Costs	Total Measure Costs (will update after Measure validation screen)	Total Capital Expenditure Costs
230000	£220,000.00	£10,000.00

Please select each of the measure types included in this batch, the total number of measures to be installed for that measure type and the total spend for that measure type.
Enter the type, total number and total spend for the measure(s) to be installed.

Which measure type will be included in the batch?
Boiler Upgrade

Description

What is the total number of the selected measure type to be installed?
20

What is the total spend for the selected measure type?
£20,000

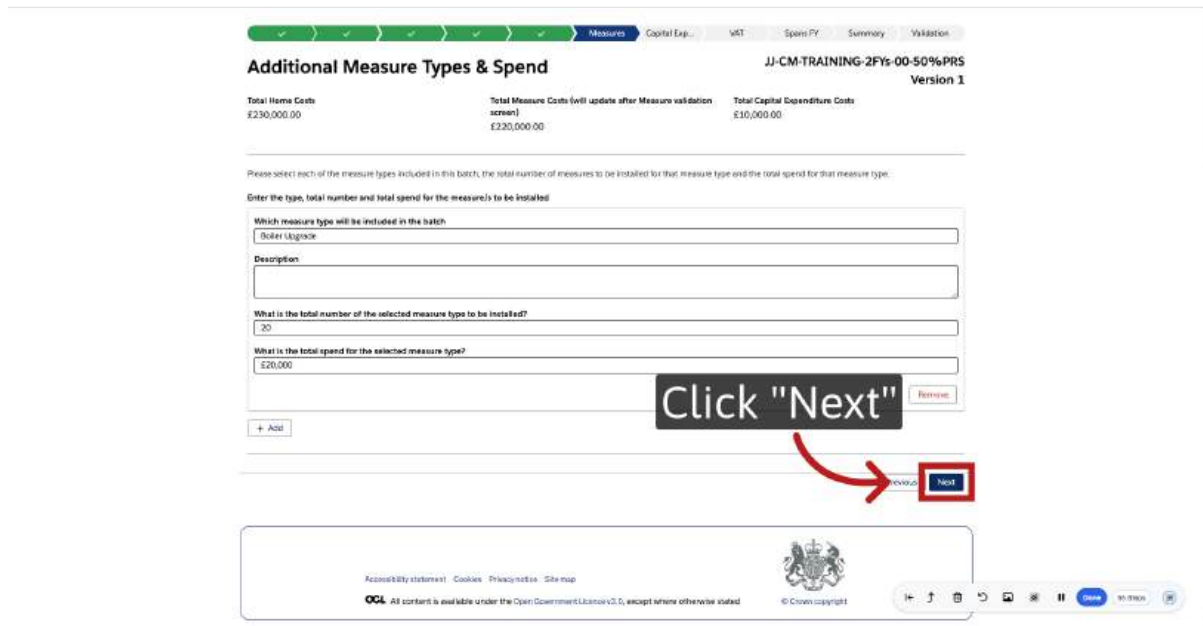
+ Add

Previous Next

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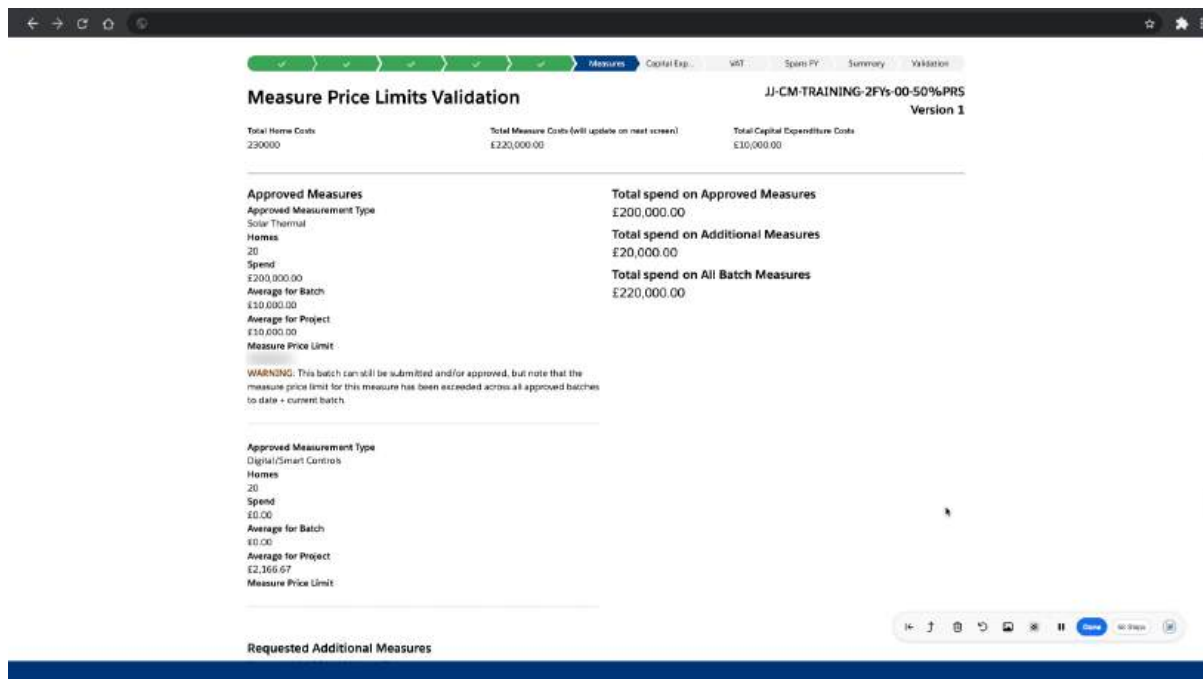
38. Click "Next"

Continue to the next stage.



39. Validation of measure price limits

The Measure Price Limits Validation page shows a summary of the standard and any custom measures requested, showing any measure price limits that may have been hit.



40. Measure Price Limits Validation

Note that only 5 eligible measures have a price limit that must be met by project closure. These include: Solid/external wall insulation; internal wall insulation; park home insulation; double/triple glazing; and solar thermal.

Measure Price Limits Validation JJ-CM-TRAINING-2FYs-00-50%PRS Version 1

Total Home Costs: £230,000.00
Total Measure Costs (will update on next screen): £220,000.00
Total Capital Expenditure Costs: £10,000.00

Approved Measures

Approved Measurement Type: Solar Thermal
Homes: 20
Spend: £200,000.00
Average for Batch: £10,000.00
Average for Project: £10,000.00
Measure Price Limit: £10,000.00

Total spend on Approved Measures: £200,000.00
Total spend on Additional Measures: £20,000.00
Total spend on All Batch Measures: £220,000.00

WARNING: This batch can still be submitted and/or approved, but note that the measure price limit for this measure has been exceeded across all approved batches to date - current batch

Requested Additional Measures

Approved Measurement Type: Digital/Smart Controls
Homes: 20
Spend: £0.00
Average for Batch: £0.00
Average for Project: £2,366.67
Measure Price Limit: £0.00

Requested Additional Measure Type: Boiler Upgrade
Homes: 20
Spend: £20,000.00

Next

41. Click "Next"

scroll down and proceed to the next step.

£200,000.00
Average for Batch: £10,000.00
Average for Project: £10,000.00
Measure Price Limit: £10,000.00

WARNING: This batch can still be submitted and/or approved, but note that the measure price limit for this measure has been exceeded across all approved batches to date - current batch

Requested Additional Measures

Requested Additional Measure Type: Boiler Upgrade
Homes: 20
Spend: £20,000.00

Click "Next"

Next

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42. Add Additional Capital Expenditure

Add Additional Capital Expenditure



43. Add additional capital expenditure

This is the opportunity where you can add figures that relate to spending that has not yet been accounted for, from the drop down list of options. In this instance, an additional £10,000 has been requested to cover PAS costs for a total of 7 homes.

Additional Capital Expenditure

JJ-CM-TRAINING-2FYs-00-50%PRS
Version 1

Total Capital Expenditure Cost
£10,000.00

d additional capital expenditure

If you have any additional capital expenditure items, you can choose which ones to include in the batch, along with the quantity and total cost.

Additionally, please specify the overall amount of capital grant funding you have already spent using your upfront payment to prepare this batch for submission/approval.

If you believe an additional capital expenditure item is clearly missing from this list - and this missing item is not already classified as ASA in the cost categorisation table in the delivery guidance - please contact OEDNZ to request whether this item can be added.

What additional capital expenditure item will be included in the batch?
PAS 2035 Retrofit Assessor/Coordinator/Evaluators/Advisor/design costs

What is the total number of the selected capital expenditure item included in the batch?
7

What is the total spend for the selected capital expenditure item?
10000

+ Add

Total sum of all additional capital expenditure requested
£10000.00

What is the total grant capital amount taken from your upfront payment already spent to prepare this batch for submission/approval?
£2,000.00

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44. Add grant money spent upfront

Beneath this, you'll find the option to add any additional grant money you received upfront, which you have already utilized to prepare this batch for submission and approval.. // This amount is not included in the totals, as it has already been allocated and spent using grant funds.

The screenshot shows a web form titled "Additional Capital Expenditure" for "JJ-CM-TRAINING-2FYs-00-50%-PRS Version 1". At the top, there are navigation tabs: "Capital Exp.", "WIT", "Spent FY", "Summary", and "Validation". Below the title, three summary items are listed: "Total Home Cost" (£230,000.00), "Total Measure Costs" (£230,000.00), and "Total Capital Expenditure Costs" (£10,000.00). The main form area contains instructions and a form for adding additional capital expenditure items. A red box highlights the field "What is the total grant capital amount taken from your upfront payment already spent to prepare this batch for submission/approval?" with the value "£2,000.00". A red arrow points to this field. At the bottom right of the form, there are "Previous" and "Next" buttons.

45. Click "Next"

Advance to the next section.

This screenshot is identical to the one above, showing the "Additional Capital Expenditure" form. A black box with the text "Click 'Next'" is overlaid on the form, with a red arrow pointing to the "Next" button at the bottom right of the form.

46. VAT Details

VAT Details



47. Click here

In this section, you will specify whether VAT is included in the amounts provided and indicate if any non-recoverable VAT has already been paid.

A screenshot of the 'Warm Homes: Grant Recipient Portal' showing the 'VAT Details' form. The page title is 'WHLG-Valley Hills Consortium-2024'. A progress bar at the top indicates the current step is 'VAT'. The form includes the following fields:

- Total Home Costs: £230,000.00
- Total Measure Costs: £220,000.00
- Total Capital Expenditure Costs: £10,000.00

Below these fields, there is a note: 'We do not expect that VAT should be included in any of the costs provided by Grant Recipients in this batch form. This is because Local Authorities are not required to pay VAT on central government funding. VAT is applicable on goods purchased with the grant funding. As Local Authorities are able to recover VAT from HMRC, DSENZ does not expect VAT to be included in their batch costs as to avoid grant payments being used for VAT, which is later recovered by Local Authorities.' The form contains two questions with radio button options:

- 'Are the costs you have provided inclusive of VAT? (* Required)' with 'Yes' and 'No' options. 'No' is selected.
- 'Did you pay non-recoverable VAT on any of the goods and services included in the batch? (* Required)' with 'Yes' and 'No' options. 'No' is selected.

At the bottom, there are 'Previous' and 'Next' buttons. The footer includes the OGL logo and copyright information.

48. Non- Recoverable VAT "Yes"

Batch That Spans Financial Years: If it looks like your batch won't wrap up by the end of the financial year, no worries! We just need you to share an estimate of the funding that will be utilized in the current year. This way, we can ensure everything stays on track and supports your needs.



51. Spans Financial Year

Remember at the beginning of the form where the estimated start and completion dates spanned over a two financial year- ends? This page is used to indicate what proportion of funding requested will be spent in each financial year.

WHLG-Valley Hills Consortium-2024

Spans FY Summary Validation

Batch Financial Year Estimate

JJ-CM-TRAINING-2FYs-00-50%PRS
Version 1

Total Home Cost £230,000.00	Total Measure Cost £230,000.00	Total Capital Expenditure Cost £10,000.00
--------------------------------	-----------------------------------	--

It appears this batch will not be completed within the same financial year it starts, please provide either an estimate of how much funding would be used in the current year or a percentage of the funding that will be used in the current year.

What is the estimated batch delivery start date?
22 Apr 2025

What is the estimated batch delivery completion date?
10 May 2026

Total Grant Requested
£170,500.00

How much funding will be spent in FY1 for this batch?

FY1 Spend £108,000	Percentage (%) 59
-----------------------	----------------------

The amount of funding left to be spent in FY2

FY2 Spend £70,500.00	Percentage (%) 41
-------------------------	----------------------

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52. Enter funding to be spend in each financial year

As you input the amount, the system automatically calculates the corresponding percentage of the total and determines the recommended expenditure or payment for the upcoming year. // Please note that if the dates selected encompassed two financial year-end periods, you would see three distinct splits displayed on- screen. Select "Next" to continue.

WHLG-Valley Hills Consortium-2024

Batch Financial Year Estimate JJ-CM-TRAINING-2FYs-00-50%PRS Version 1

Total Measure Cost: £220,000.00
Total Capital Expenditure Cost: £10,000.00

Total Grant Requested: £170,500.00

How much funding will be spent in FY1 for this batch?
FY1 Spend: £100,000.00
Percentage (%): 59

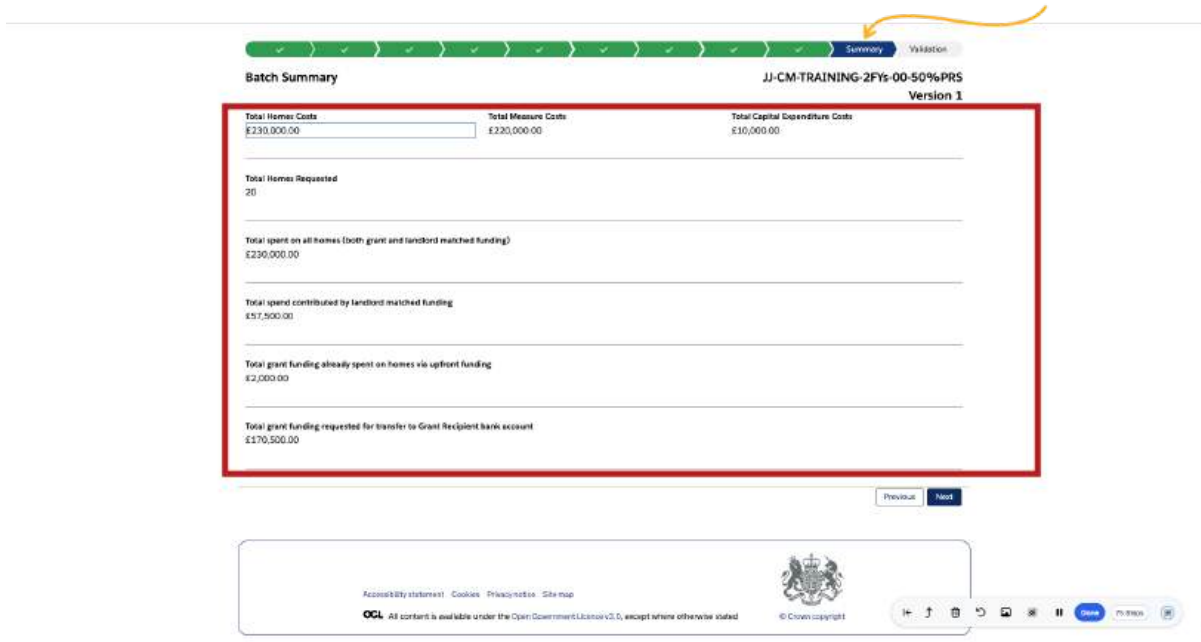
The amount of funding left to be spent in FY2
FY2 Spend: £70,500.00
Percentage (%): 41

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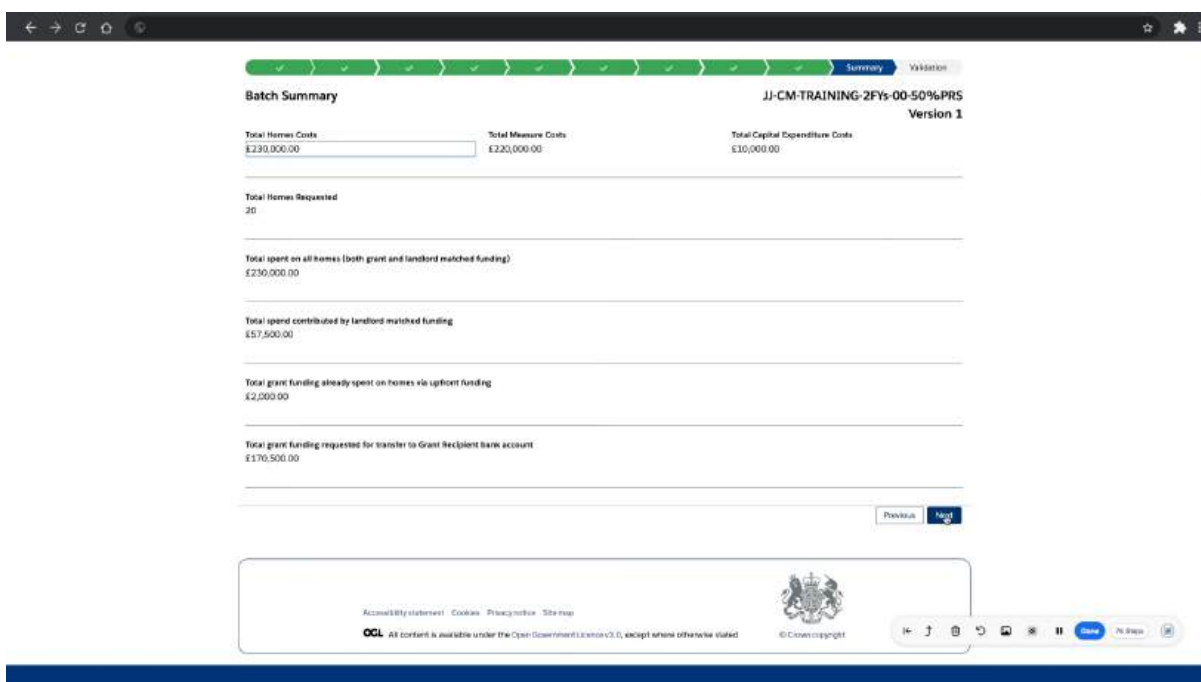
53. Summary Screen

The summary section conveniently highlights the key figures from the form, allowing you to review your data and make any necessary adjustments before submission. // Click "Next" to proceed.



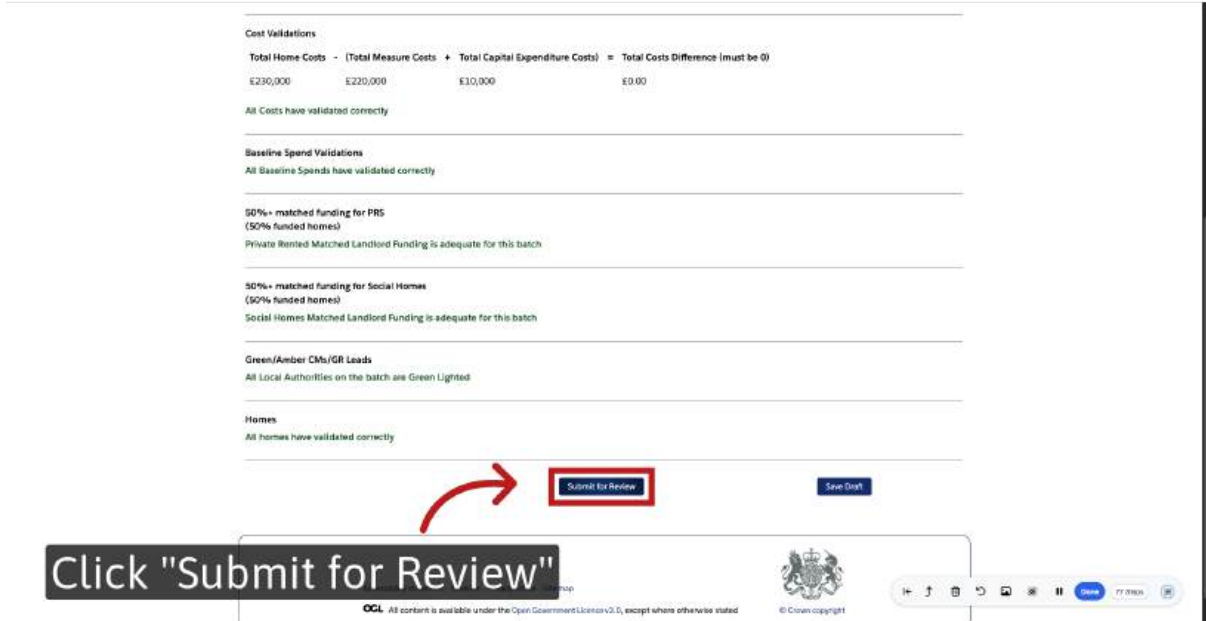
54. Final Validation Page

The validation page serves as the final checkpoint, displaying your compliance status with the established policies. Messages highlighted in green indicate that you are fully compliant. If you encounter any amber messages, these signal areas that require further review; however, they won't prevent you from submitting your batch. In contrast, red messages indicate critical issues that must be resolved before you can proceed with the submission.



55. Click "Submit for Review"

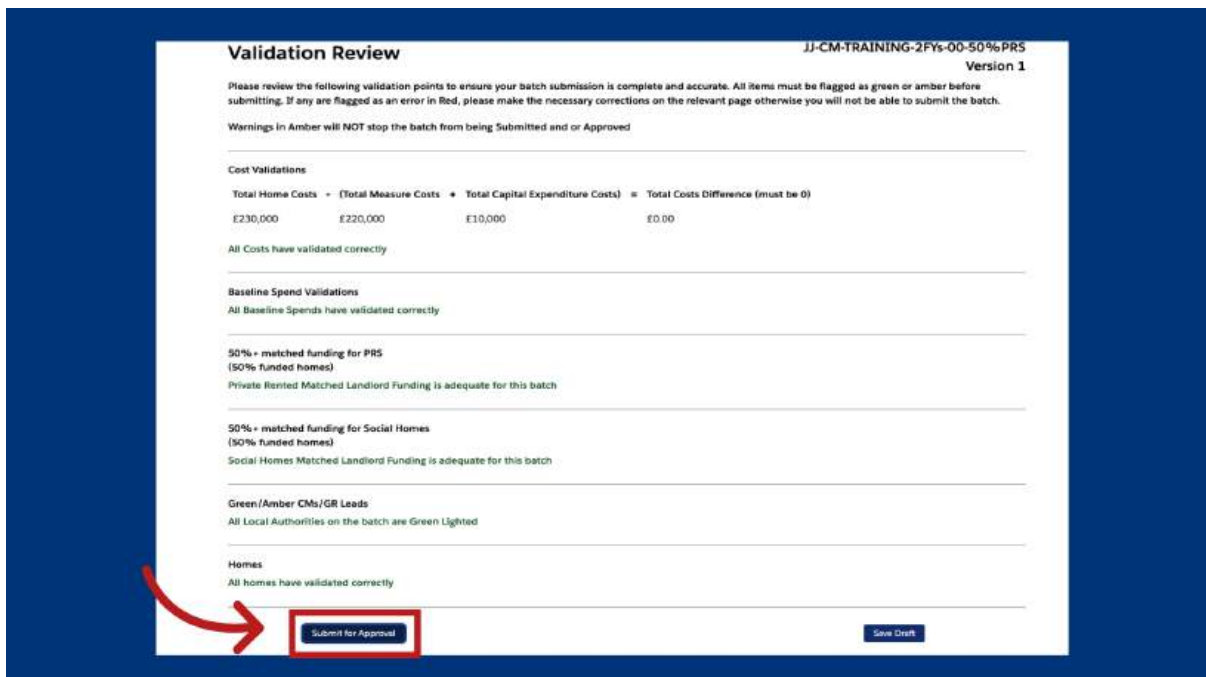
As a Consortium Member, you now have the option to either save your current progress as a draft or submit it for review by a Grant Recipient Lead.



The screenshot displays a validation summary page. At the top, under 'Cost Validations', a table shows: Total Home Costs (£230,000) minus (Total Measure Costs (£220,000) plus Total Capital Expenditure Costs (£10,000)) equals Total Costs Difference (£0.00). Below this, several sections confirm that all costs, baseline spends, 50%+ matched funding for PRS and Social Homes, Green/Amber CMs/GR Leads, and Homes have been validated correctly. At the bottom right, there are two buttons: 'Submit for Review' (highlighted with a red box and a red arrow) and 'Save Draft'. A large black box with white text 'Click "Submit for Review"' is overlaid on the bottom left. The footer includes the OCL logo and copyright information.

56. Submit for Approval

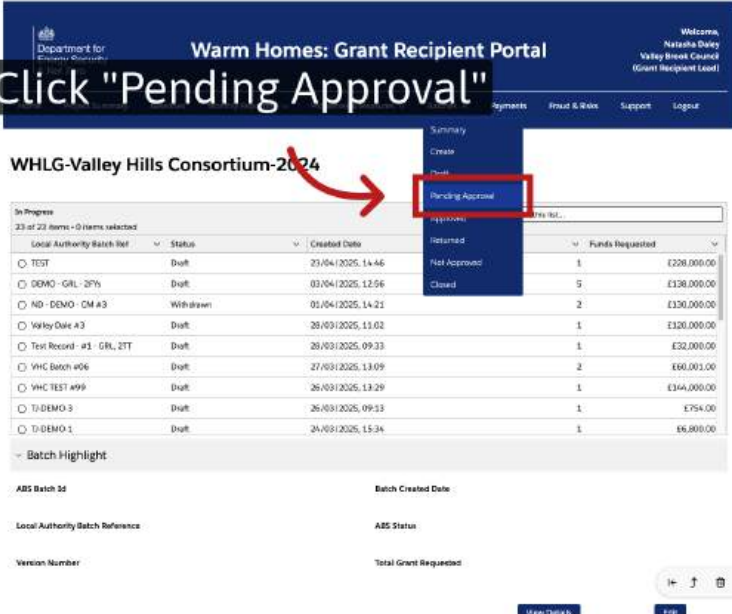
If you are logged in as a Grant Recipient Lead, you will see the option to "Submit for Approval" to a PSO at this stage. Great! We've successfully completed the submission process!



The screenshot shows a 'Validation Review' page for 'JJ-CM-TRAINING-2FYs-00-50%PRS Version 1'. It contains the same validation summary as the previous screenshot, including the cost table and various validation status messages. At the bottom right, the 'Submit for Approval' button is highlighted with a red box and a red arrow, while the 'Save Draft' button is visible next to it.

57. Click "Pending Approval"

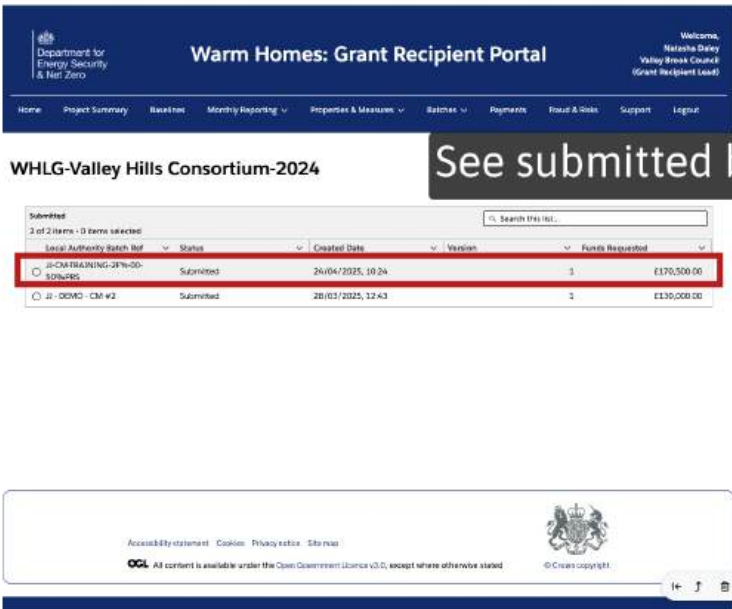
That batch will now reside in the "Pending Approval" section of the portal, until a decision is made on it by a PSO.



The screenshot shows the 'Warm Homes: Grant Recipient Portal' interface. A dark blue banner at the top contains the text 'Click "Pending Approval"'. Below this, a dropdown menu is open, with the 'Pending Approval' option highlighted in a red box. A red arrow points from this menu to the 'In Progress' section of the page. The 'In Progress' section displays a table of batches with columns for Local Authority Batch Ref, Status, Created Date, and Funds Requested. The table lists several batches, including 'TEST', 'DEMO - GRIL - 20%6', 'ND - DEMO - CM #3', 'Valley Dale #2', 'Test Record - #1 - GRIL, ZTT', 'VHC Batch #06', 'VHC TEST #99', 'TD-DEMO-3', and 'TD-DEMO-1'. A 'Batch Highlight' section is visible below the table, showing details for 'ABS Batch 5d'.

58. See submitted batch here

See the batch on screen with a status of submitted.



The screenshot shows the 'Warm Homes: Grant Recipient Portal' interface. A dark blue banner at the top contains the text 'See submitted batch here'. Below this, a table displays a list of submitted batches. The first row is highlighted with a red box and a red arrow. The table has columns for Local Authority Batch Ref, Status, Created Date, Version, and Funds Requested. The highlighted row is for batch '01-CM-TRAINING-28%50-50M#95' with a status of 'Submitted', created date of '26/04/2025, 10:24', version '1', and funds requested of '£170,500.00'. The second row is for batch '01-DEMO - CM #2' with a status of 'Submitted', created date of '28/03/2025, 12:43', version '2', and funds requested of '£130,000.00'. The bottom of the page features a footer with accessibility information, a logo, and a copyright notice.

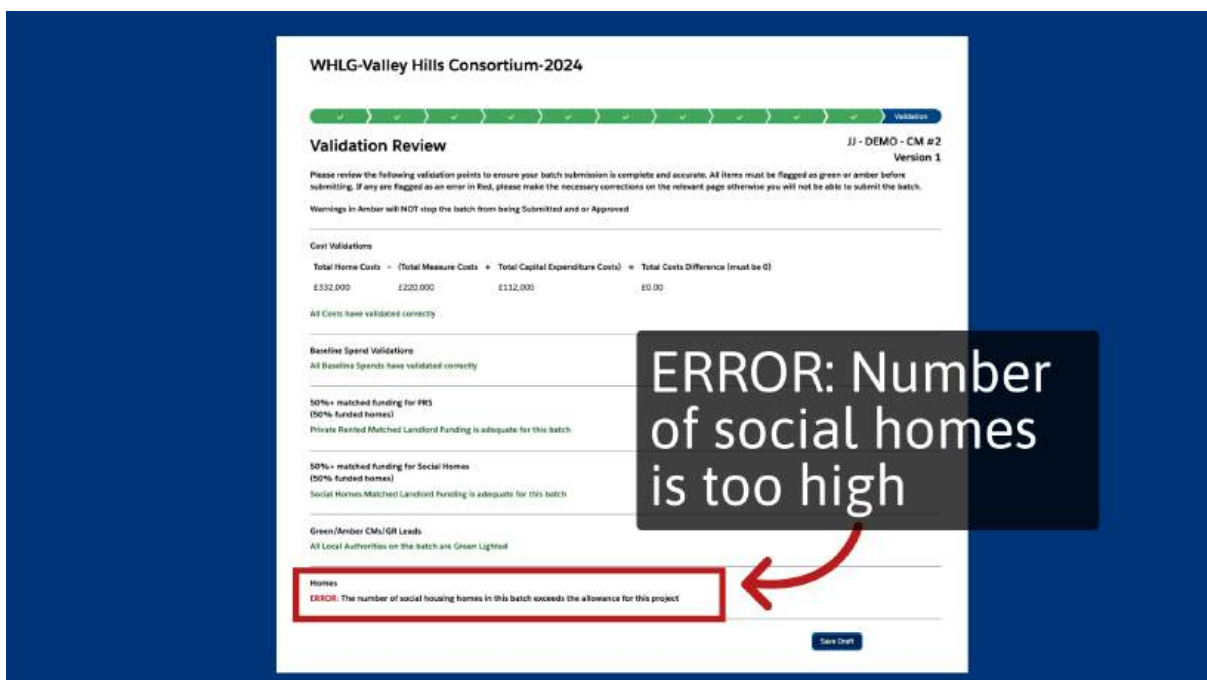
59. Understanding Validation Page Compliance Messages

Understanding Validation Page Compliance Messages. There are situations where batches may trigger additional validation rules that we did not address in our previous example. The following and final section will outline these additional validations.



60. ERROR: Number of social homes is too high

If you have social housing tenure types in your batch, the number of social homes in your batch goes over 10% of the total homes in the award baseline, you'll see a friendly red error message pop up, preventing you from moving forward.



61. WARNING: Number of homes exceed 50% of batch total

An amber warning message will appear if the number of homes in your batch exceeds 50% of the total homes scheduled for delivery.

WHLG-Valley Hills Consortium-2024

Validation Review JJ - DEMO - CM #2 Version 1

Please review the following validation points to ensure your batch submission is complete and accurate. All items must be flagged as green or amber before submitting. If any are flagged as an error in Red, please make the necessary corrections on the relevant page otherwise you will not be able to submit the batch.

Warnings in Amber will NOT stop the batch from being Submitted and or Approved

Cost Validations

Total Home Costs	(Total Measure Costs	+ Total Capital Expenditure Costs)	= Total Costs Difference (must be 0)
£322,000	£230,000	£112,000	£0.00

All Costs have validated correctly

Baseline Spend Validations

All Baseline Spends have validated correctly

50%+ matched Funding for PRS (50% funded homes)
Private Rented Matched Landlord Funding is adequate for this batch

50%+ matched Funding for Social Homes (50% funded homes)
Social Homes Matched Landlord Funding is adequate for this batch

Green/Amber CMs/GR Leads
All Local Authorities on the batch are Green Lighted

Homes
WARNING: The number of homes in this batch exceeds 50% of the total number of homes to be delivered in the Financial Year

Save Draft

62. ERROR: Total home costs do not equal measures and expenditure

A red error validation message will appear if the total home costs do not match the sum of measures and expenditures, preventing you from submitting the batch. It's essential that this equation balances correctly.

Validation Review JJ-CM TRAINING 2FY-00-50%PRS

Please review the following validation points to ensure your batch submission is complete and accurate. All items must be flagged as green or amber before submitting. If any are flagged as an error in Red, please make the necessary corrections on the relevant page otherwise you will not be able to submit the batch.

Warnings in Amber will NOT stop the batch from being Submitted and or Approved

Cost Validations

Total Home Costs	(Total Measure Costs	+ Total Capital Expenditure Costs)	= Total Costs Difference (must be 0)
£1,265,000	£220,000	£10,000	£1,035,000.00

ERROR: The Total Costs inputted on the Spend per Homes screens does not equal the total costs of the Measures plus Capital Expenditures

Baseline Spend Validations

ERROR: You have exceeded your Financial Year 2 Spend Allocation. You cannot draw down more funding than you have been allocated for a given financial year, and your allocation can only be changed by submitting a change request to DESNZ to consider.

FY 2 Approved batches spend plus current: £1,083,500.00
FY 2 Spend baseline: 440,000

50%+ matched Funding for PRS (50% funded homes)
Private Rented Matched Landlord Funding is adequate for this batch

50%+ matched Funding for Social Homes (50% funded homes)
Social Homes Matched Landlord Funding is adequate for this batch

Green/Amber CMs/GR Leads
All Local Authorities on the batch are Green Lighted

Homes
All homes have validated correctly

63. ERROR: Baseline spend exceeded

A red error validation message will appear if the batch expenditure for any financial year surpasses the baseline amount for that financial year. // The system will also show you how much you'd take the spend over by, and the financial year baseline figure you should be adhering to.

The screenshot shows a 'Validation Review' page for a batch named 'J-CM-TRAINING-2FYs-00-50%PRS'. The page includes a progress bar at the top with 'Validation' highlighted. Below the title, there is a warning: 'Please review the following validation points to ensure your batch is ready for submission. If any are flagged as an error in Red, please make the necessary corrections before submitting. Warnings in Amber will NOT stop the batch from being Submitted (and/or Approved)'. A table titled 'Cost Validations' shows: Total Home Costs (£1,265,000), Total Measure Costs (£220,000), Total Capital Expenditure Costs (£10,000), and Total Costs (Difference (must be 0)) (£1,035,000.00). An error message states: 'ERROR: The Total Costs inputted on the Spend per Homes screens does not equal the total costs of the Measures plus Capital Expenditures'. A red box highlights the 'Baseline Spend Validations' section, which contains: 'ERROR: You have exceeded your Financial Year 2 Spend Allocation. You cannot draw down more funding than you have been allocated for a given financial year, and your allocation can only be changed by submitting a change request to DESNZ to consider. FY 2 Approved batches spend plus current: £1,083,500.00 FY 2 Spend baseline: 440,000'. A red arrow points to this error message. Other sections include '50%+ matched funding for PRS (50% funded homes)', '50%+ matched funding for Social Homes (50% funded homes)', 'Green/Amber CMs/GR Leads', and 'Homes'.

This mini-guide provided a thorough overview for Consortium members and grant recipient leads on how to create a batch while avoiding spend limits and other validation rules. In the following video, you will learn how Leads can effectively review, edit, and submit a batch to a PSO.

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