

Home Energy Advice (HEA)

Local Authority Frequently Asked Questions

This FAQ provides practical information for Local Authorities preparing to use Home Energy Advice (HEA) and manage referrals through the Grant Recipient Portal (GRP). It covers access, onboarding, referral management, and eligibility verification. Further updates will be shared as launch plans and guidance are confirmed.

Access and onboarding

1. Can Delivery Partners access referral information in the GRP?

Yes. Delivery Partner access can be provided where this reflects the Local Authority's delivery model and the functions the Delivery Partner needs to perform.

There are three access scenarios available:

- **Referrals only**
- **Referrals and batches**
- **Referrals and broader grant-management activity**

Where a Delivery Partner only requires access to referrals, access will be provided using the lowest permission level and **does not require a delegated authority letter**.

Where a Delivery Partner requires access to broader grant-management functionality, the appropriate **delegated authority arrangements must be in place** before access can be granted.

Local Authorities should confirm the required access level for each user as part of onboarding.

2. Can additional users be added after launch?

Yes. Additional users can be added after launch if requirements change. Existing GRP users can have HEA referral permissions added to their account, or a new account can be created where needed as per the existing GRP access process.

3. Can Delivery Partner staff manage referrals on behalf of a Local Authority?

Yes. Delivery Partner staff can be given access where they are responsible for managing referrals on behalf of the Local Authority. Each Local Authority should confirm who will manage its referrals and provide the relevant user details during onboarding.

4. Will referral access provide access to funding or financial information?

Not necessarily, access to the GRP will align with various access scenarios. Some of these are detailed above. When a new user is requested to be onboarded post launch we will confirm what access requirement is required.

- **Referrals only**
- **Batches only**
- **Broader grant-management activity only**
- **Referrals and batches**
- **Referrals and broader grant-management activity**

Referral management

5. What happens to existing referrals?

Existing referrals will not migrate into HEA. The current referral portal will remain available for a short period after launch so Local Authorities can download and process existing leads before the portal closes.

6. Is referral management only for grant-funded referrals?

HEA provides broader home energy advice and support to consumers. However, the GRP referral management functionality being introduced is currently focused on Warm Homes: Local Grant referrals.

HEA will provide a new route for future customers to advice and schemes. Residents who complete the HEA eligibility journey and are identified as potentially eligible will be referred through the GRP for Local Authorities to view, manage and update, this builds on the current WHLG checker.

7. Can referral information be exported?

Yes. The current design allows referral information to be downloaded in Excel or CSV format. Further information on the export format will be shared ahead of launch to support local preparation and integration activities.

8. Will managing referrals through the GRP create additional administration?

The integration of referral management to the GRP has been designed to reduce administration and centralise referral and grant information in one tool - instead of two. Additionally, the added element of verification that has been introduced to referrals that will be submitted via the new Home Energy Advice Service should in many cases also significantly reduce the administrative burden prior to grant delivery. The GRP referral functionality has been designed to streamline this process, including multi-update uploads that allow certain changes to be prepared in one document and applied to multiple referrals at the same time. We will continue to work with Local Authorities to keep the process practical.

9. If a Local Authority is paused, will they automatically receive referrals at launch?

No. Local Authorities that are currently paused will remain paused when HEA launches until they are ready to resume receiving referrals. Providing user access requirements in advance will not change paused status or trigger referrals before the Local Authority is ready.

Eligibility and verification

10. What information will Local Authorities receive?

Local Authorities will receive referral and applicant information (see Table 1: HEA WHLG Referral Fields). As well as an applicant's details, a referral will contain a referral type categorisation and a verification outcome to help determine what action may be needed and to give greater insight on the customer journey of a user prior to referral submission. Referral types will help determine eligibility routes such as IMD or where referrals have been generated through a digital assistance route. Outcomes may indicate that a referral is eligible and verified or that the verification of their eligibility is undetermined. An undetermined outcome would highlight where further manual checks may be required.

11. How will complex cases be handled?

IVT (Income Verification Tool) is designed to automate straightforward cases and escalate uncertainty rather than make assumptions. Cases involving lodgers, students, HMOs, non-dependents, multi-family households, informal living arrangements, recent changes in circumstances, Housing Benefit or unclear household income or composition may require Local Authority review. In these circumstances, the IVT

may return an undetermined outcome to the Local Authority. Local Authorities will be required to process the applicants and check eligibility via their manual process. In these circumstances, IVT may return an undetermined outcome. The Local Authority remains responsible for the final eligibility decision.

12. How will benefit eligibility be verified?

HEA uses IVT and supporting verification processes to assess eligibility using available data sources. Further information on the verification approach and the information available to Local Authorities will be provided through onboarding and guidance materials ahead of launch.

13. Can Local Authorities add local workflow stages or fields?

The current GRP design includes standard referral statuses to support referral management and programme reporting. It does not currently allow Local Authorities to create bespoke workflow stages or custom fields as this tool is used across all authorities involved with the delivery of WHLG. Local Authorities may need to maintain separate local records where additional processes or data capture are required.

Training, support and launch readiness

14. When is HEA expected to launch?

The current expectation is that HEA will launch in late autumn 2026. The final go-live date and any associated onboarding activities will be confirmed as soon as possible.

15. Will training or guidance be provided?

Yes. Support ahead of launch will include guidance documents, a Local Authority support pack, launch materials and webinar sessions to help users prepare for HEA and referral management through the GRP.