

Table 1: HEA WHLG Referral Fields

Referral field	What the field will contain or means
Referral code	A unique reference code used to identify and track the referral.
Full name	The primary applicant or property resident's legal first and last name.
Email	The primary email address used for application updates and correspondence.
Phone	The primary contact telephone number, which may be a mobile or landline.
Property address	The complete street address of the property for which support is being requested. The confirmed design uses one consolidated address field.
Postcode	The official postcode of the property for which support is being requested.
UPRN	The Unique Property Reference Number used to identify the property address.
Do you own the property?	What the applicant stated was their ownership or tenancy status (options: <i>Yes, it is my main residence</i> ; <i>Yes, but I rent it out</i> ; <i>Yes, it is my second home</i> ; <i>No, I am a private tenant</i> ; or <i>No, I am a social housing tenant</i>)
EPC current energy rating	The property's current energy-efficiency rating, from A to G, taken from its most recent Energy Performance Certificate.
EPC confirmation	Confirmation that a valid Energy Performance Certificate for the property has been verified on the national register.
EPC lodgement date	The date on which the current EPC was registered on the central EPC register.
EPC valid until	The expiration date of the current EPC (typically 10 years from lodgement).
EPC tenure	The property occupancy type recorded on the EPC (e.g., Owner-occupied, Rented (private), Rented (social)).
Annual household income	The combined income of the adults in the household, excluding people in full-time education and lodgers. The calculation is primarily based on HMRC earnings data and DWP benefits data.
Property ownership status	The applicant's ownership or tenancy status, such as owner-occupied, privately rented or socially rented.

Local authority	The local council or administrative authority attached to the property address.
ID check completed	Indicates whether the applicant's identity has been verified by GOV.UK One Login
Referral type	Identifies what type of eligibility criteria the referral was submitted against and whether that eligibility has been verified by IVT.
Verification outcome	Shows which elements of eligibility have or have not been confirmed through IVT verification. This should be considered alongside the referral type, and provides deeper insight to the user's referral journey.
Referral status	Shows the referral's current position in the Local Authority's operational process – <i>This field can be changed by the local authority managing the referral and will cause a status change in a user's account on HEA</i>
Unsuccessful application reason	The primary reason recorded when a referral is unsuccessful– <i>This field can be changed by the local authority managing the referral and will be visible in a user's account on HEA</i>
Date/time opened	The date and time when the referral record was created.
Referred through assisted digital	A Yes/No field showing whether the referral was submitted through the assisted digital platform run by the HEA helpline.
<i>The following field will only be completed if the referral came through the assisted digital route via a third party.</i>	
Caller name	The name of the person who contacted the telephone service on behalf of the applicant.
Caller phone	The telephone number of the person who called on behalf of the applicant.
Caller email	The email address of the person who called on behalf of the applicant.
Caller relationship	The caller's relationship to the applicant, for example family member, carer, support worker or landlord.