

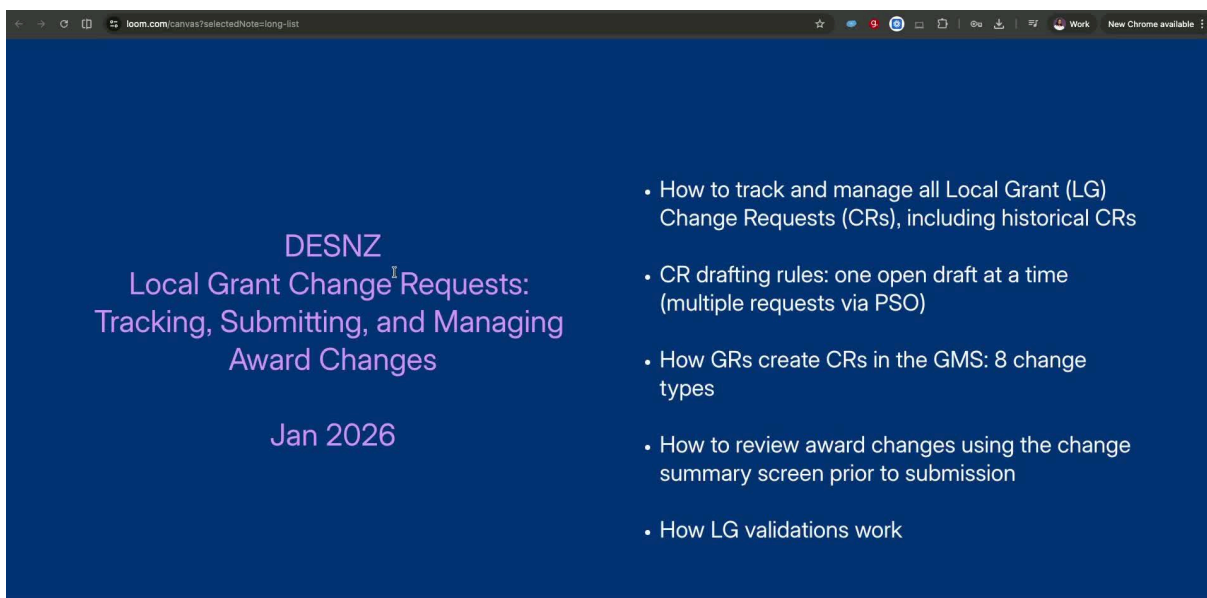
Managing Change Requests in DESNZ GMS Portal for Local Grant Awards

Objective

This document outlines the steps for tracking, submitting, and managing change requests within DESNZ Grant Management System (GMS).

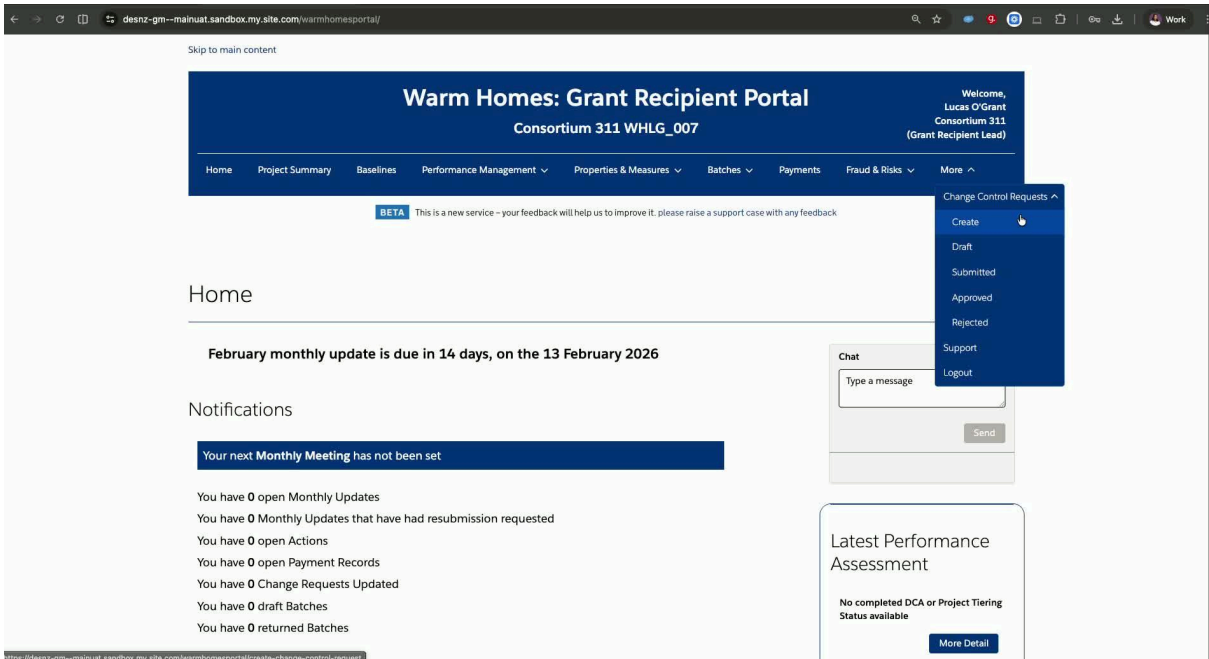
Key Steps

1. Accessing Change Requests 0:42



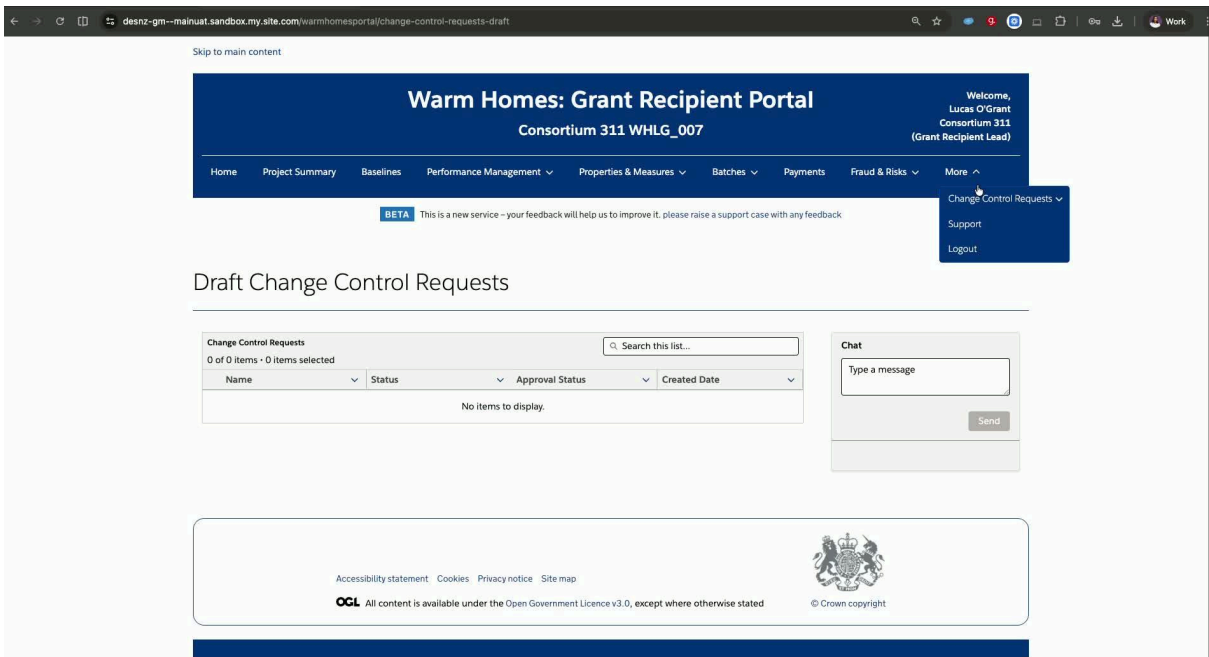
- Log in to the Grant Recipient Portal (GMS).
- Navigate to the Change Request section by selecting **More > Change Control Requests**.

2. Understanding Change Request Pages 1:04



- Familiarize yourself with the five pages: **Create, Draft, Submitted, Approved, and Rejected.**
- **Create:** Where new change requests are initiated.
- **Draft:** Contains change requests that are created but not submitted.
- **Submitted:** Displays all submitted change requests.
- **Approved:** Lists all approved change requests.
- **Rejected:** Shows any rejected change requests.

3. Creating a Change Request 1:34



- Click on **Create** to start a new change request.
- Review the guidance page and select **Next**.

4. Filling Out Change Request Details 1:57

Specify the project areas that will be affected by the change - lists all affected components, systems, processes, sites/estates, properties, measure types, standard and/or energy efficiency targets, milestones, baseline factors and/or KPIs with precise identifiers or names.

What change needs to happen?

Why Change Is Required?

Implications If Not Approved

Change Summary

Change Request Type Select

- Award Name
- Delivery Plan
- Consortium Composition
- Consortium Lead
- Supplier
- Project End Date
- Income Verification
- Other change

Please click next button, if you want to add your selected option to this change request.

Once you are finished making your changes to the above, please progress by clicking the button below

[Go to Reason and Mitigating Actions](#)

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- On the main page, outline the change needed, reasons for the change, implications if not approved, and a summary of the change.
- Select the appropriate change type from the eight options available.

5. Selecting Change Types 3:05

desnz-gm--mainuat-sandbox.my.site.com/warmhomesportal/create-change-control-request

Type a message
Send

Brief Change Summary

Clearly state the purpose of the change and what it aims to achieve. Please state the purpose of the change with measurable goals and specific outcomes.

Specify the project areas that will be affected by the change - lists all affected components, systems, processes, sites/estates, properties, measure types, standard and/or energy efficiency targets, milestones, baseline factors and/or KPIs with precise identifiers or names.

What change needs to happen?

TEST

Why Change Is Required?

TEST

Implications if Not Approved

TEST

Change Summary

TEST

Change Request Type Select

Award Name
 Delivery Plan
 Consortium Composition
 Consortium Lead
 Supplier
 Project End Date
 Income Verification
 Other change

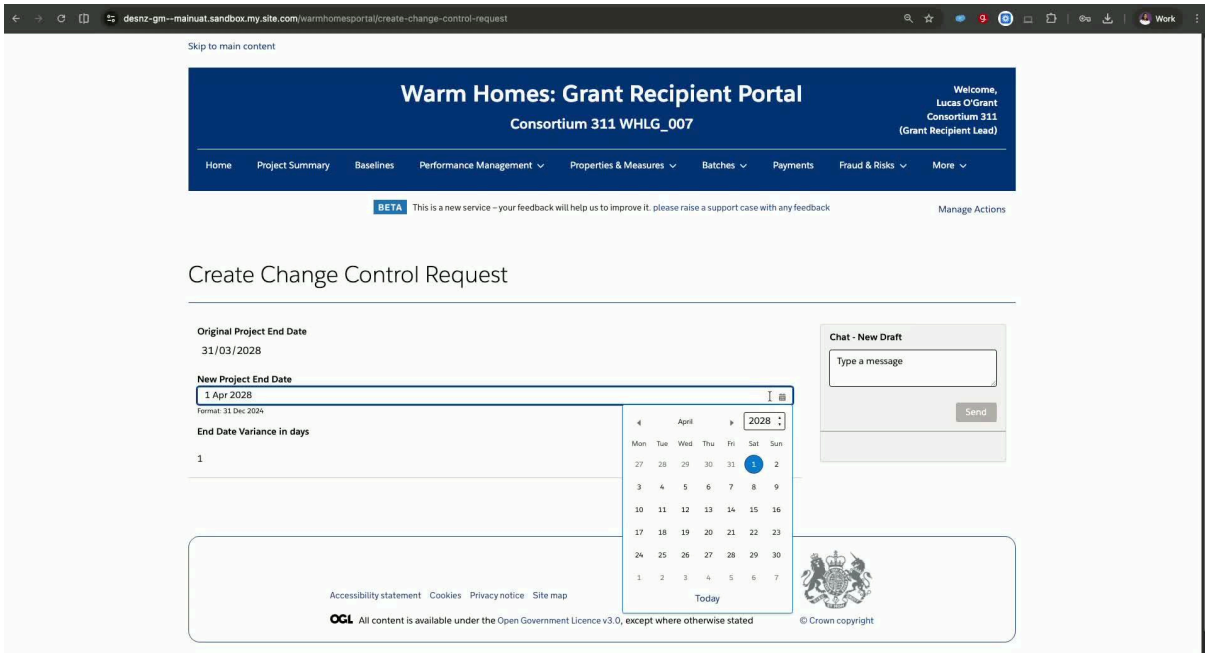
Please click next button, if you want to add your selected option to this change request

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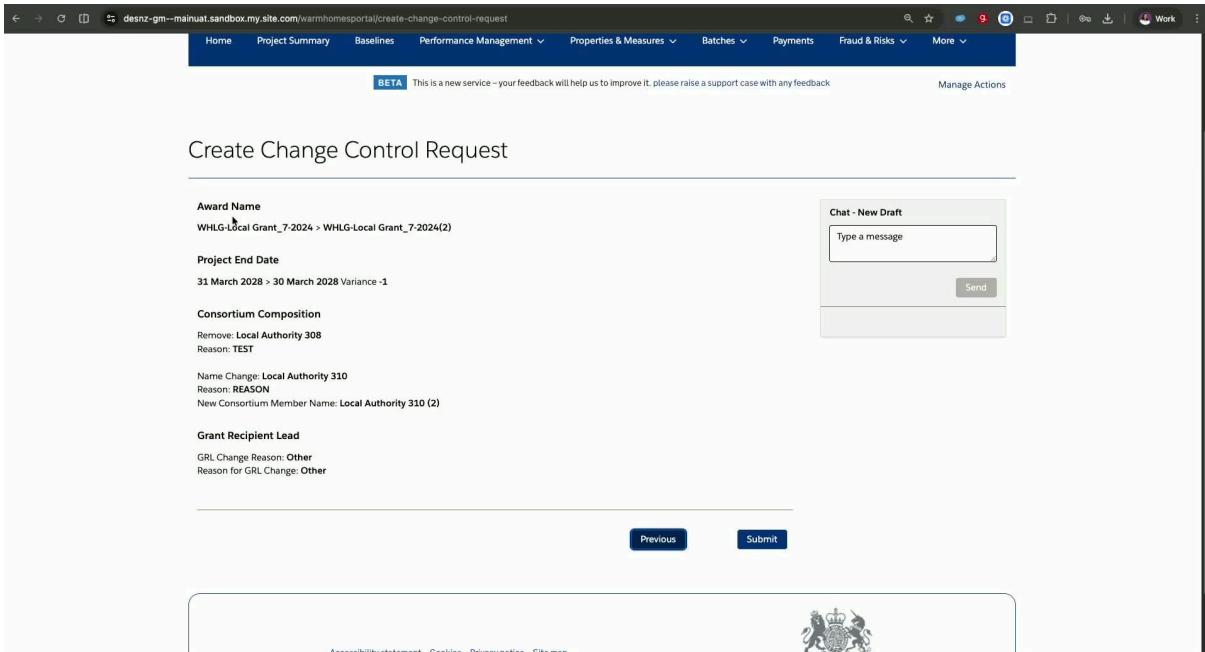
- Choose from the following change types:
 - Award Name
 - Delivery Plan
 - Consortium Composition
 - Consortium Lead
 - Supplier
 - Project End Date
 - Income Verification
 - Other
- For each type, follow the prompts to provide necessary details.

6. Providing Reasons and Mitigating Actions 5:57



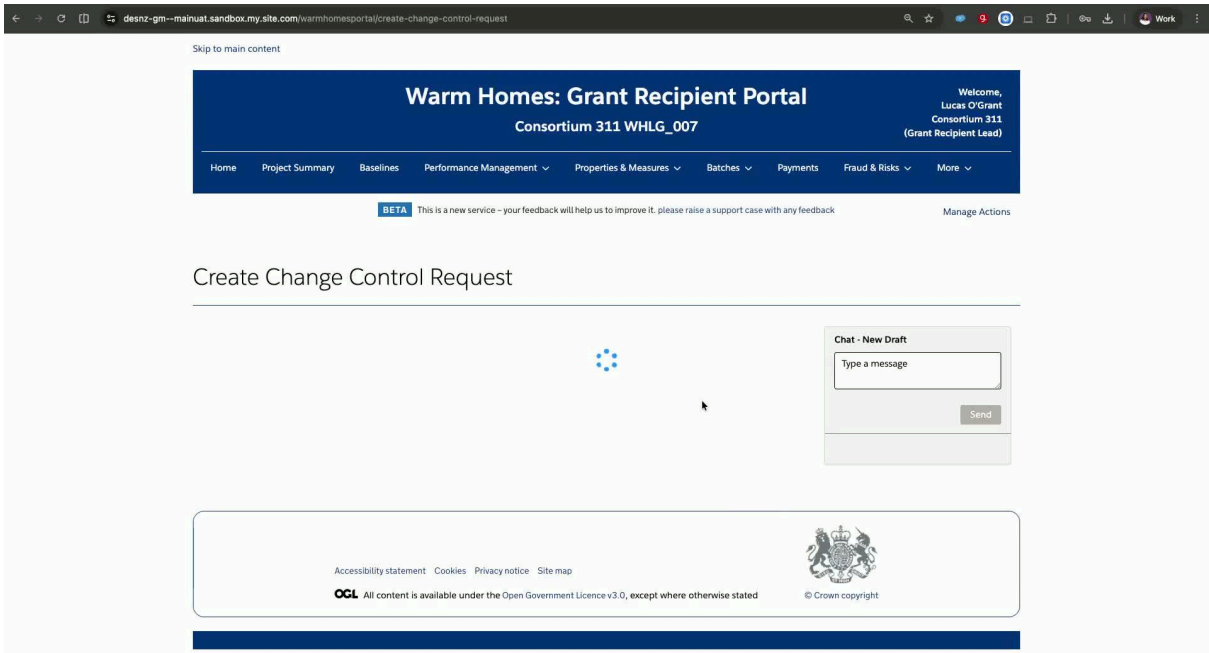
- Input the cause and impact of the change, along with any mitigating actions.
- Review the guidance text provided.

7. Reviewing Summary of Changes 6:21



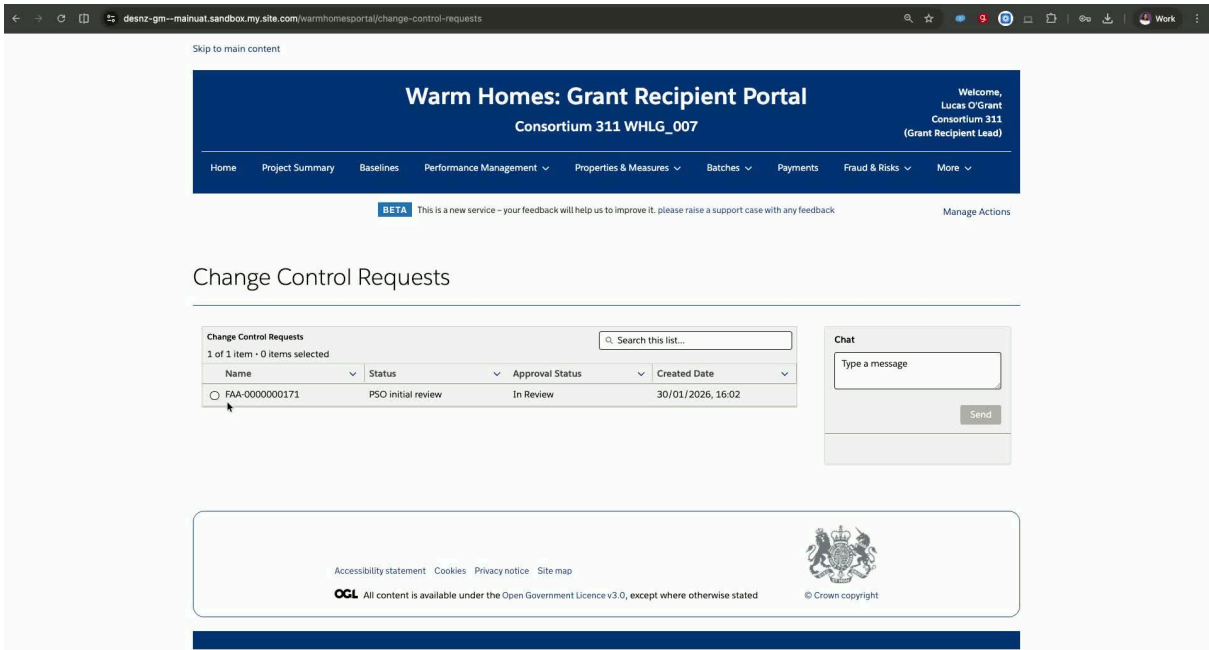
- After entering all details, review the summary of changes to ensure accuracy.

8. Submitting the Change Request 6:43



- Click **Submit** to finalize the change request.
- Note the change request reference number for tracking.

9. Tracking Submitted Change Requests 7:12



- Navigate to the **Submitted** page to view the status of your change request.
- Understand that the status will remain in review until it is approved or rejected.

10. Handling Approved Change Requests 8:37

Skip to main content

Warm Homes: Grant Recipient Portal

Consortium 311 WHLG_007

Welcome,
Lucas O'Grant
Consortium 311
(Grant Recipient Lead)

Home
Project Summary
Baselines
Performance Management
Properties & Measures
Batches
Payments
Fraud & Risks
More

BETA This is a new service – your feedback will help us to improve it. please raise a support case with any feedback
 Manage Actions

Approved Change Control Requests

Change Control Requests

1 of 1 item - 0 items selected

Name	Status	Approval Status	Created Date
FAA-0000000171	PSO initial review	Approved	30/01/2026, 16:02

Chat - FAA-0000000172

Type a message

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- Once approved, you will receive an email notification.
- Check the **Approved** page to confirm the changes have been made.

11. Creating Custom Change Requests 9:13

Skip to main content

Warm Homes: Grant Recipient Portal

Consortium 311 WHLG_007

Welcome,
Lucas O'Grant
Consortium 311
(Grant Recipient Lead)

Home
Project Summary
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Payments
Fraud & Risks
More

BETA This is a new service – your feedback will help us to improve it. please raise a support case with any feedback
 Manage Actions

Create Change Control Request

Current Funding Award Name

WHLG-Local Grant_7-2024(2)

New Funding Award Name

Chat - FAA-0000000172

Type a message

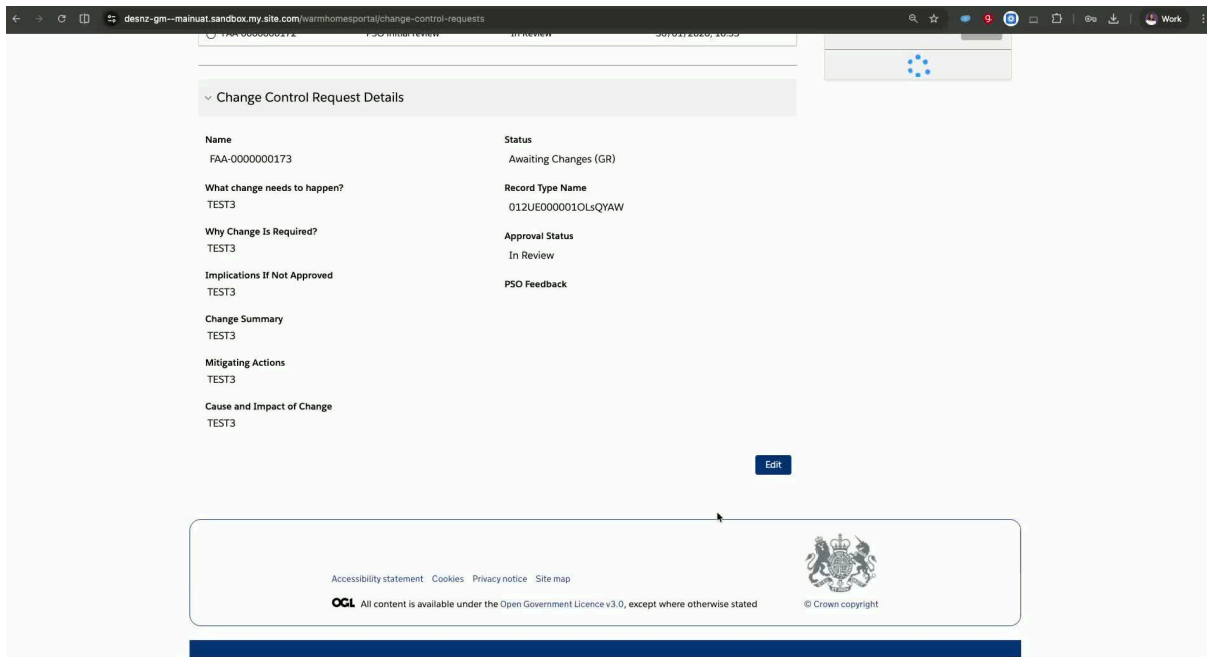
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- Use the **Other** change type for requests that do not fit standard categories.
- Provide necessary details for the custom request.

12. Editing Submitted Change Requests 17:41



- If a change request is returned for edits, you can access it from the **Submitted** page.
- Make necessary amendments and resubmit.

Cautionary Notes

- Only one change request can be created at a time unless agreed otherwise with the PSO.
- Ensure all details are accurate before submission to avoid delays in processing.

Tips for Efficiency

- Familiarize yourself with the change types and their requirements to streamline the process.
- Keep a record of previous change requests for reference when creating new ones.

Link to Loom

<https://loom.com/share/e028b1e19026477d9941caeb817d07bf>