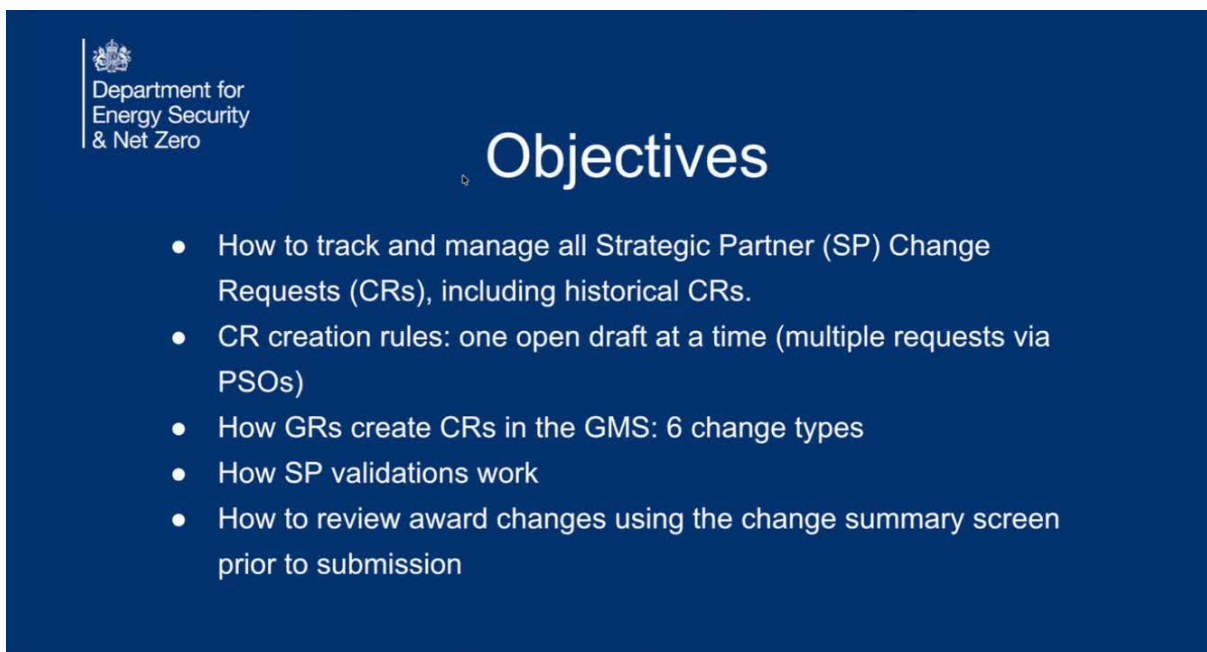


Managing Strategic Partner Change Requests in the GMS Portal

This document outlines the steps for tracking, submitting, and managing change requests for strategic partner awards in the GMS portal.

Key Steps

1. Accessing the Change Control Area [0:58](#)



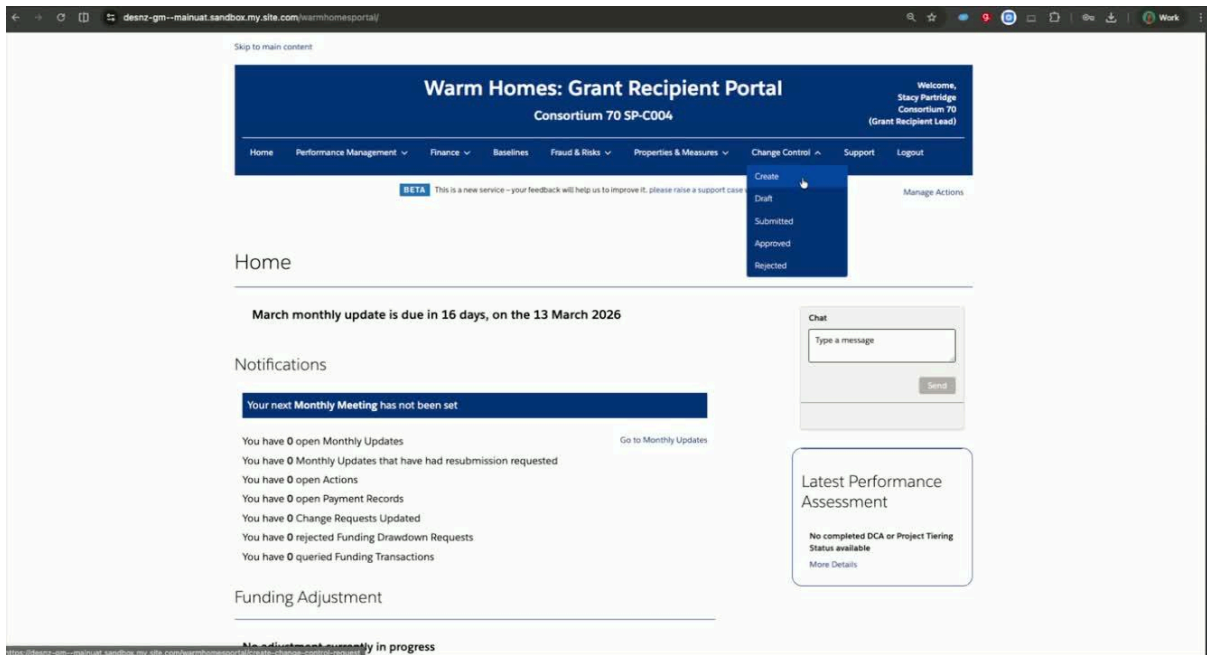
Department for
Energy Security
& Net Zero

Objectives

- How to track and manage all Strategic Partner (SP) Change Requests (CRs), including historical CRs.
- CR creation rules: one open draft at a time (multiple requests via PSOs)
- How GRs create CRs in the GMS: 6 change types
- How SP validations work
- How to review award changes using the change summary screen prior to submission

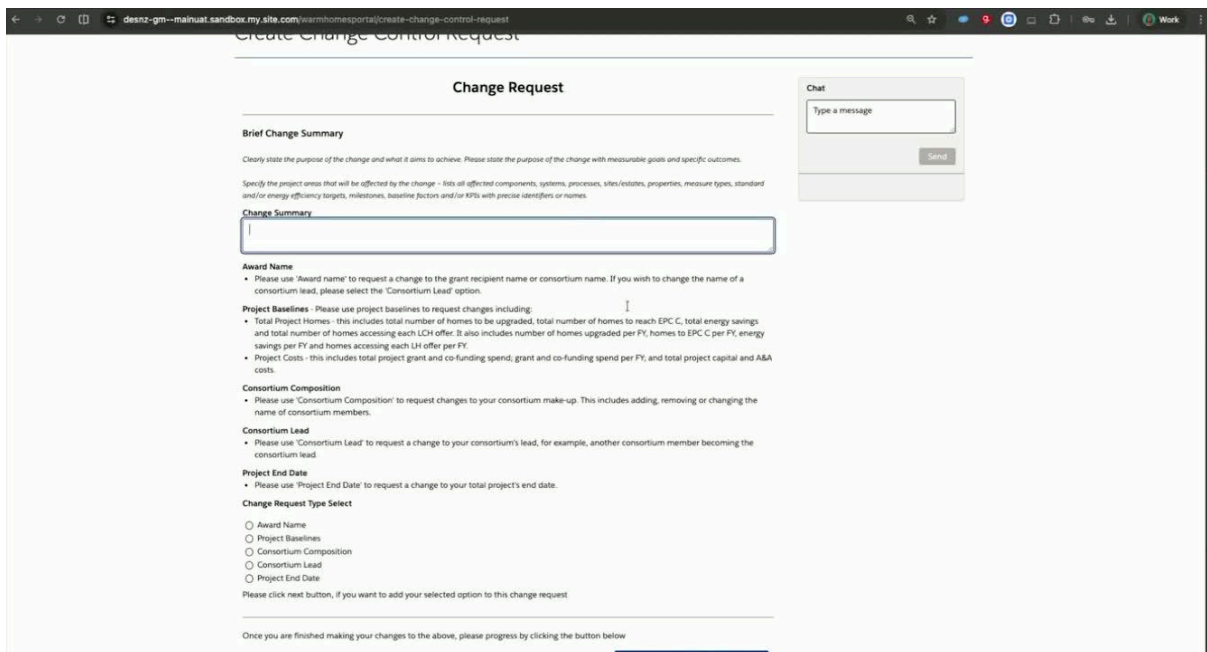
- Log in to the GMS portal.
- Navigate to the Change Control tab at the top of the screen.

2. Understanding Change Request Pages [1:14](#)



- Familiarize yourself with the following pages:
 - **Create:** For creating new change requests.
 - **Draft:** For viewing all draft change requests.
 - **Submitted:** For viewing submitted change requests.
 - **Approved:** For viewing approved change requests.
 - **Rejected:** For viewing rejected change requests.

3. Creating a Change Request 1:28



- On the Create page, select the type of change request you want to create.

- Ensure only one draft is open at a time unless otherwise instructed.

4. Saving Your Progress 2:30

Change Request

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 - list 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.

Change Summary

Award Name

- Please use 'Award name' to request a change to the grant recipient name or consortium name. If you wish to change the name of a consortium lead, please select the 'Consortium Lead' option.

Project Baselines - Please use project baselines to request changes including:

- Total Project Homes - this includes total number of homes to be upgraded, total number of homes to reach EPC C, total energy savings and total number of homes accessing each LCH offer. It also includes number of homes upgraded per FY, homes to EPC C per FY, energy savings per FY and homes accessing each LH offer per FY.
- Project Costs - this includes total project grant and co-funding spend, grant and co-funding spend per FY, and total project capital and A&A costs.

Consortium Composition

- Please use 'Consortium Composition' to request changes to your consortium make-up. This includes adding, removing or changing the name of consortium members.

Consortium Lead

- Please use 'Consortium Lead' to request a change to your consortium's lead, for example, another consortium member becoming the consortium lead.

Project End Date

- Please use 'Project End Date' to request a change to your total project's end date.

Change Request Type Select

Award Name

Project Baselines

Consortium Composition

Consortium Lead

Project End Date

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](#)

- Each time you click 'Next' or 'Save', your progress is automatically saved.

5. Submitting Multiple Change Types 3:14

Change Request

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 - list 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.

Change Summary

TEST

Award Name

- Please use 'Award name' to request a change to the grant recipient name or consortium name. If you wish to change the name of a consortium lead, please select the 'Consortium Lead' option.

Project Baselines - Please use project baselines to request changes including:

- Total Project Homes - this includes total number of homes to be upgraded, total number of homes to reach EPC C, total energy savings and total number of homes accessing each LCH offer. It also includes number of homes upgraded per FY, homes to EPC C per FY, energy savings per FY and homes accessing each LH offer per FY.
- Project Costs - this includes total project grant and co-funding spend, grant and co-funding spend per FY, and total project capital and A&A costs.

Consortium Composition

- Please use 'Consortium Composition' to request changes to your consortium make-up. This includes adding, removing or changing the name of consortium members.

Consortium Lead

- Please use 'Consortium Lead' to request a change to your consortium's lead, for example, another consortium member becoming the consortium lead.

Project End Date

- Please use 'Project End Date' to request a change to your total project's end date.

Change Request Type Select

Award Name

Project Baselines

Consortium Composition

Consortium Lead

Project End Date

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

[Next](#)

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

- You can submit multiple change types within a single change request.

- After completing a change type, you will return to the main page to select another change type.

6. Editing Award Name and Consortium Composition 4:34

The screenshot shows a web browser window with the URL `desnz-gm--mainuat.sandbox.my.site.com/warmhomesportal/create-change-control-request`. The page title is "Warm Homes: Grant Recipient Portal" for Consortium 70 SP-C004. The user is identified as "Stacy Partridge, Consortium 70 (Grant Recipient Lead)".

The main heading is "Create Change Control Request". Below it, instructions state: "If the organisation name of the Grant Recipient, or lead Grant Recipient (if a consortium) has changed. Please type the new legal name of the Grant Recipient, or lead Grant Recipient (if a consortium) within the 'New Funding Award Name' box below." It also notes that consortium lead changes should be done via the 'Consortium Lead' section.

The form contains two input fields:

- Current Funding Award Name:** SHF3-SHF Strategic Partner_176-2024
- New Funding Award Name:** FGUK

 There are "Previous" and "Next" buttons at the bottom of the form. A chat window titled "Chat - New Draft" is visible on the right side.

- To change the award name, enter the new name and click 'Next'.
- For consortium composition, add or remove members as necessary.

7. Changing the Consortium Lead 5:34

The screenshot shows the same web browser window as above. The main heading is "Create Change Control Request". Instructions state: "Please indicate below if you wish to change your Consortium Lead Grant Recipient. You should select the reason for the Lead Grant Recipient change. If you require an option outside of those in the drop down list, please select 'other' and add this detail into the text box provided."

The form contains:

- A dropdown menu for "Reason for Grant Recipient Lead Change" with "Other" selected.
- A text box for "If Other, Please detail who the new GRL is and why the change has happened" containing the word "OTHER".

 There are "Previous" and "Next" buttons at the bottom of the form. A chat window titled "Chat - New Draft" is visible on the right side.

- Select the reason for the lead change and enter the new lead's details.

8. Adjusting Project End Date 6:18

Warm Homes: Grant Recipient Consortium 70 SP-C004

Home Performance Management Finance Baselines Fraud & Risks Properties & Measures

WELCOME, Stacy Partridge Consortium 70 (Grant Recipient Lead)

Control Support Logout

BETA This is a new service – your feedback will help us to improve it, please raise a support ticket if you have any issues.

Create Change Control Request

Please enter the updated end date for your project below.

Please be reminded that:

- If your project end date changes, but remains within the same financial year, you do not need to submit a Project Change Request. Please let your DSM know of the change and they will update your records on the GMS accordingly.
- If your project end date moves into a new financial year, you must submit a Project Change Request using the table below.

Original Project End Date
31/03/2028

New Project End Date
26 Feb 2026
Format: 31 Dec 2024

End Date Variance in days
-764

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- Change the project end date as needed; the system will calculate the variance in days.

9. Custom Change Control Requests 6:47

Change Request Type Select

Award Name

Project Baselines

Consortium Composition

Consortium Lead

Project End Date

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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- Navigate to the Project Baselines section to edit project costs or total project homes.

10. Reviewing Financial Year Data 7:20

Create Change Control Request

GMS - Change Control Request Form

Please indicate below any change to your project total grant and co-funding spend using the 'Award Baseline' fields below. Once these have been completed, the 'Next' button will allow you to move through each Financial Year and amend your co-funding and grant funding per FY, as necessary.

Finally, please indicate any changes to your grant capital and A&A spend, and your co-funding capital and A&A spend under the 'Award Baseline' section. You should be prompted to fill this section out once you have updated your spend per FY.

Total grant funding spend across all FYs must equal the total project grant amount in your Award Baseline. Total co-funding spend across all FYs must equal the total project co-funding amount in your Award Baseline. These amounts can be seen below in the 'Total Grant Spend' and 'Total Co-Funding Spend' fields.

Please be reminded that:

- The overall co-funding contribution must be a minimum of 50% of eligible costs, excluding any costs incurred on homes accessing the on-gas grid LCH incentive offer.
- Grant A&A funding must total no more than 15% of total project grant funding.
- Total A&A costs must total no more than 15% of total project costs.
- Total grant requested must adhere to the project cost caps. More specifically, total grant requested must equal no more than (£11,000 × homes accessing the off-gas grid LCH offer) + (£20,000 × homes accessing the on-gas grid LCH offer) + (£7,500 × remaining homes i.e. homes not accessing any LCH incentives).
- All costs are assumed to be **exclusive of any non-recoverable VAT**.

PEAT Financial Year 3 - Baseline V2		
Current Grant Spend	Proposed Grant Spend	Grant Spend Variance
10000000	£10,000,000.00	£0.00
Current Co Funding Spend	Proposed Co Funding Spend	Co Funding Spend Variance
£10,000,000.00	£10,000,000.00	£0.00

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- Ensure that current and proposed grant spends meet the required thresholds.

11. Submitting the Change Request 12:37

Warm Homes: Grant Recipient Portal

Consortium 70 SP-C004

Welcome, Stacy Partridge
Consortium 70
(Grant Recipient Lead)

Home Performance Management Finance Baselines Fraud & Risks Properties & Measures Change Control Support Logout

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

Chat - New Draft

Type a message

Send

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- Review the summary of changes made.

- Click 'Submit' to finalize the change request.

12. Approval Process 14:19

The screenshot shows the 'Warm Homes: Grant Recipient Portal' interface. The top navigation bar includes links for Home, Performance Management, Finance, Baselines, Fraud & Risks, Properties & Measures, Change Control, Support, and Logout. A 'Manage Actions' link is also present. The main content area is titled 'Baselines' and features a 'Baseline History' table. The table lists various baseline versions with their start dates and statuses. The first row, 'PEAT-Financial Year-1-Baseline V3', is selected and shows a status of 'Active'. Below the table, there is a 'View Milestone Progress' button and a 'Detail' section.

Baseline Version	Start Date	Status
PEAT-Financial Year-1-Baseline V3	1 Apr 2025	Active
PEAT-Award Baseline V3	1 Apr 2025	Active
PEAT-Financial Year-2-Baseline V3	1 Apr 2026	Active
PEAT-Financial Year-3-Baseline V3	1 Apr 2027	Active
PEAT-Financial Year-1-Baseline V1	1 Apr 2025	Historic
PEAT-Award Baseline V1	1 Apr 2025	Historic
PEAT-Financial Year-1-Baseline V2	1 Apr 2025	Historic
PEAT-Award Baseline V2	1 Apr 2025	Historic
PEAT-Financial Year-2-Baseline V1	1 Apr 2026	Historic

- After submission, the change request will be reviewed and approved by the PSO.

Cautionary Notes

- Ensure compliance with the one-draft rule to avoid errors.
- Double-check all financial figures to prevent submission errors.

Tips for Efficiency

- Keep the GMS portal open while watching the instructional video for better understanding.
- Use the 'Next' button frequently to save progress and avoid losing data.

Link to Loom

<https://loom.com/share/0eb45672055545b48525949e73eb0704>