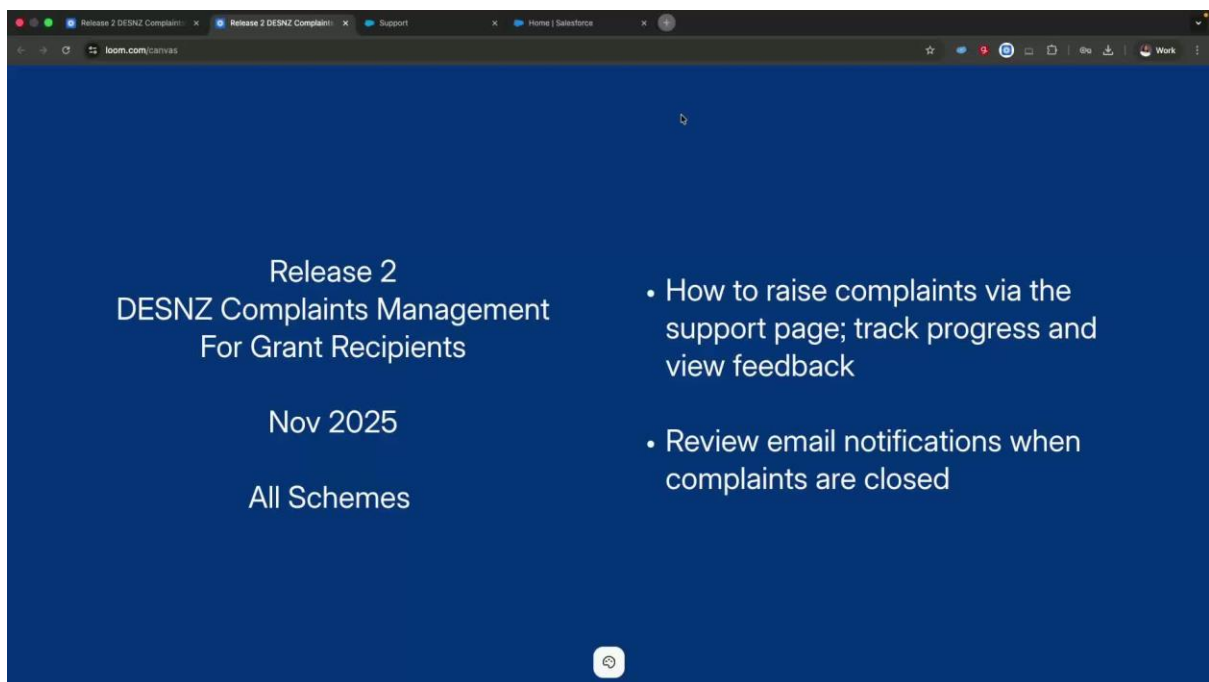




Department for
Energy Security
& Net Zero

R2-07-G1: Complaints Management for Grant Recipients

1. Introduction to Complaints Management 0:00



- Overview of the video purpose:
 - Learn how to raise complaints via the GR Portal support page.
 - Track progress of complaints.
 - Review feedback on complaints.

2. Accessing the GMS Portal 0:34

The screenshot shows the 'Warm Homes: Grant Recipient Portal' for Birmingham City Consortium LG-9876. The navigation bar includes links for Home, Project Summary, Baselines, Performance Management, Properties & Measures, Batches, Payments, Fraud & Risk, and More. A 'More' dropdown menu is visible, showing options like 'Support', 'Help', 'Feedback', and 'Logout'. A 'BETA' banner indicates a new service for feedback. A message states 'Your self evaluation form is ready to submit. Click here'. The 'Home' section shows 'is in 0 days'. The 'Notifications' section lists updates: 'Your next Monthly Meeting has not been set', 'You have 0 open Monthly Updates', 'You have 0 Monthly Updates that have had resubmission requested', 'You have 0 open Actions', 'You have 1 open Payment Records - Go to Payments', 'You have 0 Change Requests Updated', 'You have 0 draft Batches', and 'You have 0 returned Batches'. A 'Key Data' section and a 'Latest Performance Assessment' section are also visible. A chat window on the right shows a message from Luke O'Grant.

- Navigate to the GR Portal.
- Select 'More' and then 'Support' to access the Help and Support page.

3. Creating a Complaint Case 0:48

The screenshot shows the 'Help and Support' page. It includes a 'Select a case type' section with radio buttons for 'Support', 'Record Change', and 'Complaint' (which is selected). A 'Create case' button is visible. Below this is a 'Support Cases' table with 4 items. The table has columns for Ref No., Subject, Record Type Name, Type, Created Date, and Status. The data rows are as follows:

Ref No.	Subject	Record Type Name	Type	Created Date	Status
00001100	Chat message escalated to complaint in the back end	Message Escalation	Complaint	19/12/2025, 11:51	New
00001099	Test Complaint raised in the portal 2	Complaint	Complaint	19/12/2025, 11:28	Escalated
00001098	Test Complaint raised in the portal	Complaint	Complaint	19/12/2025, 11:28	In Progress
00001097	Complaint summary 1	Complaint	Complaint	19/12/2025, 11:27	Closed

Below the table, it says 'No Record Selected'.

- On the Help and Support page, select 'Case Type' as 'Complaint'.
- Click on the button to create a new complaint case.

4. Viewing Existing Support Cases 1:02

The screenshot shows the Birmingham City Consortium LG-9876 support portal. The header includes navigation links: Home, Project Summary, Baselines, Performance Management, Properties & Measures, Batches, Payments, Fraud & Risks, and More. A BETA banner states: "This is a new service - your feedback will help us to improve it, please raise a support case with any feedback." Below the header is a "Help and Support" section with a description: "This enables the submission of support cases for technical assistance, including help with login and access issues, permissions (such as accessing reports), or requests to update records - such as removing duplicate addresses or modifying property measure costs." A "Select a case type" section has radio buttons for Support, Record Change, and Complaint (selected). A "Create case" button is present. The "Support Cases" section shows a table with 4 items selected. The table has columns: Ref No., Subject, Record Type Name, Type, Created Date, and Status. The data rows are:

Ref No.	Subject	Record Type Name	Type	Created Date	Status
00001100	Chat message escalated to complaint in the back end	Message Escalation	Complaint	19/12/2025, 11:51	New
00001099	Test Complaint raised in the portal 2	Complaint	Complaint	19/12/2025, 11:28	Escalated
00001098	Test Complaint raised in the portal	Complaint	Complaint	19/12/2025, 11:28	In Progress
00001097	Complaint summary 1	Complaint	Complaint	19/12/2025, 11:27	Closed

Below the table, it says "No Record Selected". At the bottom, there is a footer with links: Accessibility statement, Cookies, Privacy notice, Site map, and the Birmingham City Council logo.

- Existing support cases are displayed in a table.
- Differentiate case types using the 'Type' field.

5. Understanding Record Types 1:16

The screenshot shows the Birmingham City Consortium LG-9876 support portal. The header includes navigation links: Home, Project Summary, Baselines, Performance Management, Properties & Measures, Batches, Payments, Fraud & Risks, and More. A BETA banner states: "This is a new service - your feedback will help us to improve it, please raise a support case with any feedback." Below the header is a "Help and Support" section with a description: "This enables the submission of support cases for technical assistance, including help with login and access issues, permissions (such as accessing reports), or requests to update records - such as removing duplicate addresses or modifying property measure costs." A "Select a case type" section has radio buttons for Support, Record Change, and Complaint (selected). A "Create case" button is present. The "Support Cases" section shows a table with 4 items selected. The table has columns: Ref No., Subject, Record Type Name, Type, Created Date, and Status. The data rows are:

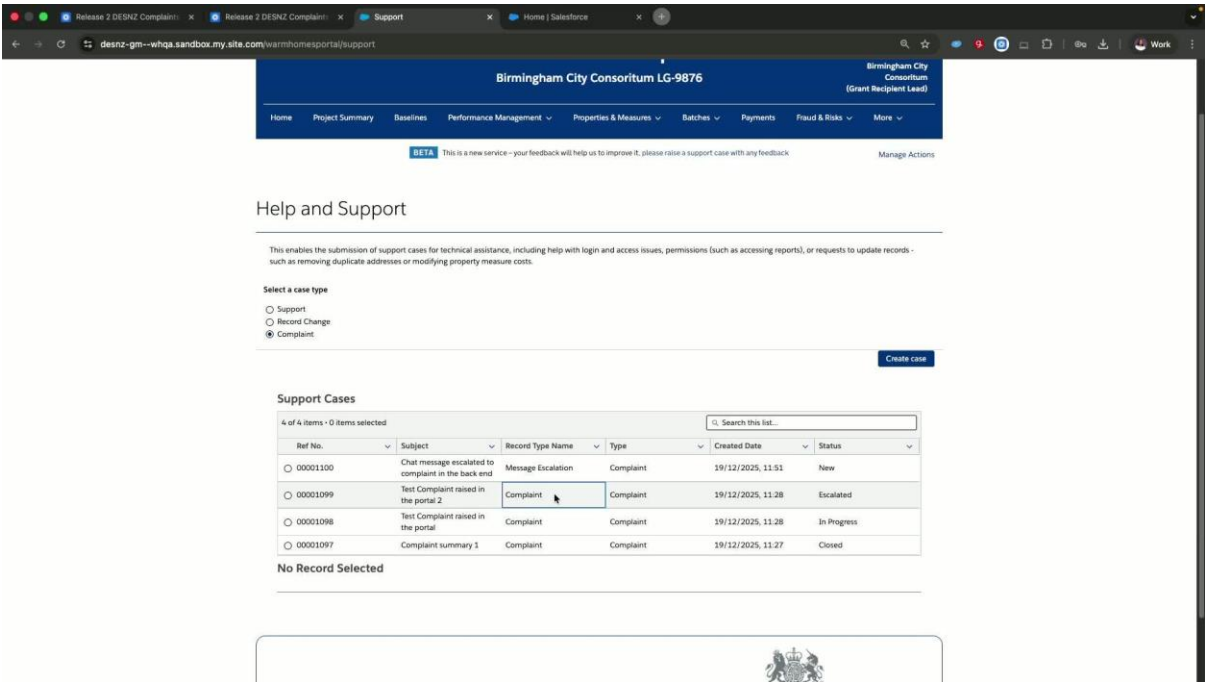
Ref No.	Subject	Record Type Name	Type	Created Date	Status
00001100	Chat message escalated to complaint in the back end	Message Escalation	Complaint	19/12/2025, 11:51	New
00001099	Test Complaint raised in the portal 2	Complaint	Complaint	19/12/2025, 11:28	Escalated
00001098	Test Complaint raised in the portal	Complaint	Complaint	19/12/2025, 11:28	In Progress
00001097	Complaint summary 1	Complaint	Complaint	19/12/2025, 11:27	Closed

Below the table, it says "No Record Selected". At the bottom, there is a footer with links: Accessibility statement, Cookies, Privacy notice, Site map, and the Birmingham City Council logo.

- Two record types related to complaints:
 - 'Complaint' for raised complaints.

- 'Message Escalation' for chat messages escalated to cases.

6. Tracking Case Status 1:29



- View the status of all cases at a glance.
- Example: Status 'escalated' indicates the case is under investigation by a Scheme lead.

7. Types of Escalations 2:28

Warm Homes: Grant Recipient Portal
Birmingham City Consortium LG-9876

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

Help and Support

This enables the submission of support cases for technical assistance, including help with login and access issues, permissions (such as accessing reports), or requests to update records – such as removing duplicate addresses or modifying property measure costs.

Select a case type

☐ Support
☐ Record Change
☐ Complaint

Create Case

Support Cases

6 of 6 items - 0 items selected

Search this list...

Ref No.	Subject	Record Type Name	Type	Created Date	Status
00001102	DESNZ to review	Message Escalation	Complaint	19/12/2025, 12:28	Escalated
00001101	Test complaint 3	Complaint	Complaint	19/12/2025, 12:17	Escalated
00001100	Chat message escalated to complaint in the back end	Message Escalation	Complaint	19/12/2025, 11:51	Escalated
00001099	Test Complaint raised in the portal 2	Complaint	Complaint	19/12/2025, 11:28	Escalated
00001098	Test Complaint raised in the portal	Complaint	Complaint	19/12/2025, 11:28	In Progress
00001097	Complaint summary 1	Complaint	Complaint	19/12/2025, 11:27	Closed

No Record Selected

- Two types of escalations:
 - From PSO to DESNZ (status 'escalated').
 - From chat message to formal complaint case (not necessarily escalated to DESNZ).

8. Receiving Email Notifications 3:37

Warm Homes: Grant Recipient Portal
Birmingham City Consortium LG-9876

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

Help and Support

This enables the submission of support cases for technical assistance, including help with login and access issues, permissions (such as accessing reports), or requests to update records – such as removing duplicate addresses or modifying property measure costs.

Select a case type

☐ Support
☐ Record Change
☐ Complaint

Create Case

Support Cases

6 of 6 items - 0 items selected

Search this list...

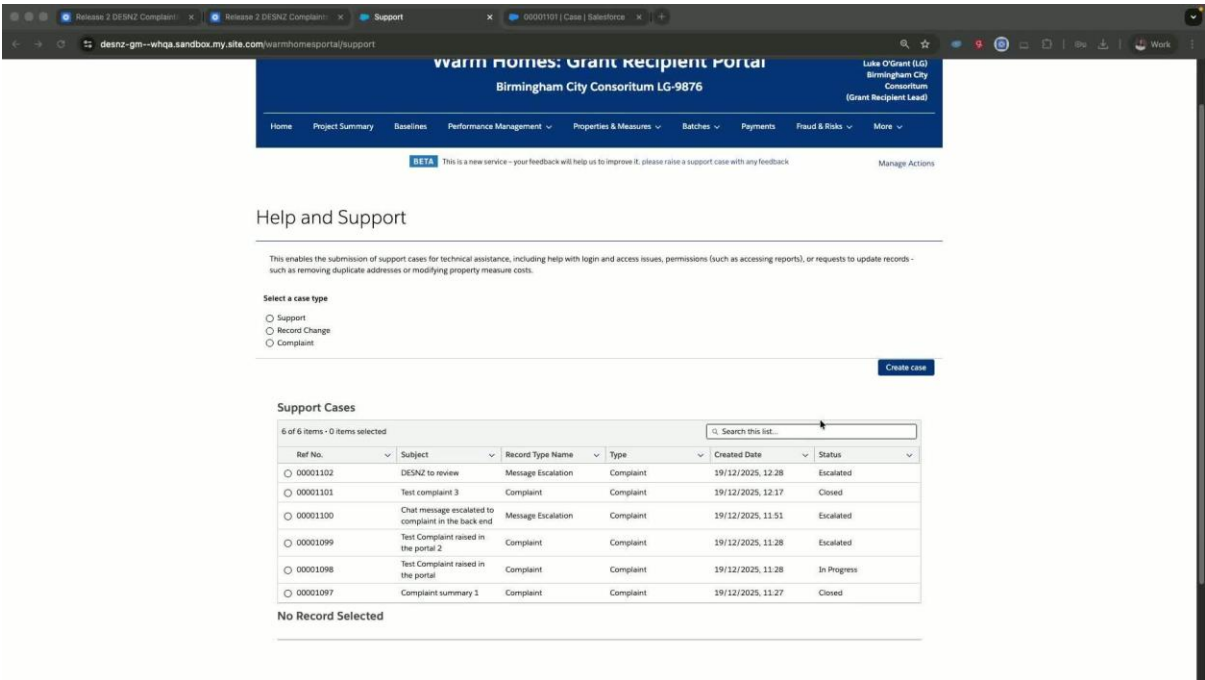
Ref No.	Subject	Record Type Name	Type	Created Date	Status
00001102	DESNZ to review	Message Escalation	Complaint	19/12/2025, 12:28	Escalated
00001101	Test complaint 3	Complaint	Complaint	19/12/2025, 12:17	Escalated
00001100	Chat message escalated to complaint in the back end	Message Escalation	Complaint	19/12/2025, 11:51	Escalated
00001099	Test Complaint raised in the portal 2	Complaint	Complaint	19/12/2025, 11:28	Escalated
00001098	Test Complaint raised in the portal	Complaint	Complaint	19/12/2025, 11:28	In Progress
00001097	Complaint summary 1	Complaint	Complaint	19/12/2025, 11:27	Closed

No Record Selected

- Example of an email received when a complaint case is closed:
 - Notification states the complaint has been updated.

- Instructions to log in to the portal for updates.

9. Summary of Key Points 3:59



- Reviewed how to:
 - Raise complaints in the GR Portal.
 - Track progress of existing complaints.
 - Review feedback from internal users.
- Discussed email notifications for closed complaints.

Link to Loom

<https://loom.com/share/ab49cb6b9a434d0d8254b55560bf0a1c>