

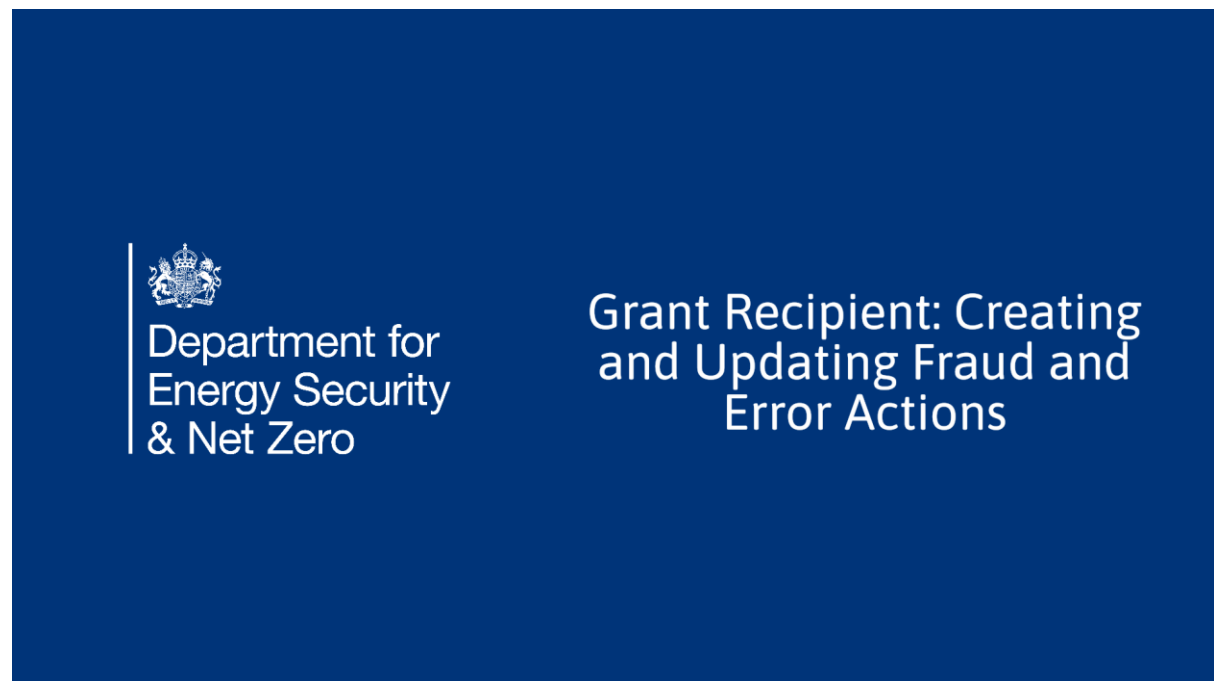


Department for
Energy Security
& Net Zero

R2-04-G1 GR Creating and Updating Fraud and Error Actions

1. Cover

Welcome to this guide on Creating and Updating Fraud and Error Actions



2. Disclaimer

This guide uses DESNZ training environment demo data, and reflects the system as of November 2025. For the best experience, have the system open and pause the video as needed to follow along.

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3. Objectives

This video aims to support you with the following on the Grant Recipient portal. Creating, Tracking, and Updating Actions for Fraud Cases. Understanding the 'Overdue' status of Fraud Actions



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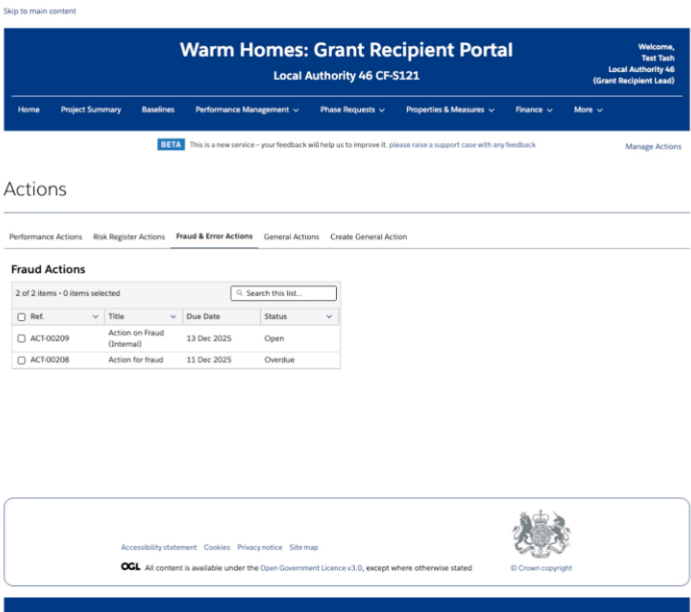
Objectives

This video aims to support with you with the following on the Grant Recipient portal:

- Creating, Tracking and Updating Actions for Fraud Cases
- Understanding the 'Overdue' status of Fraud Actions

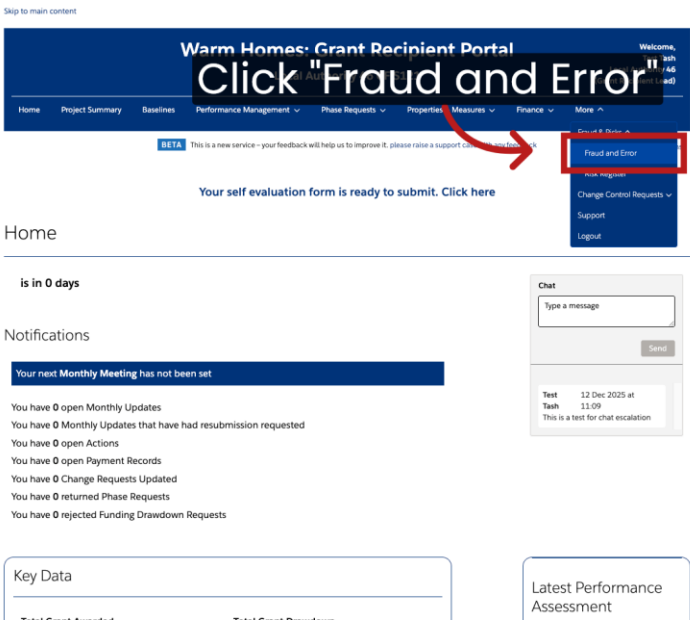
4. Confirm User Login Status

In this example, we are logged into the Portal as a Grant Recipient Lead, for Local Authority 46.



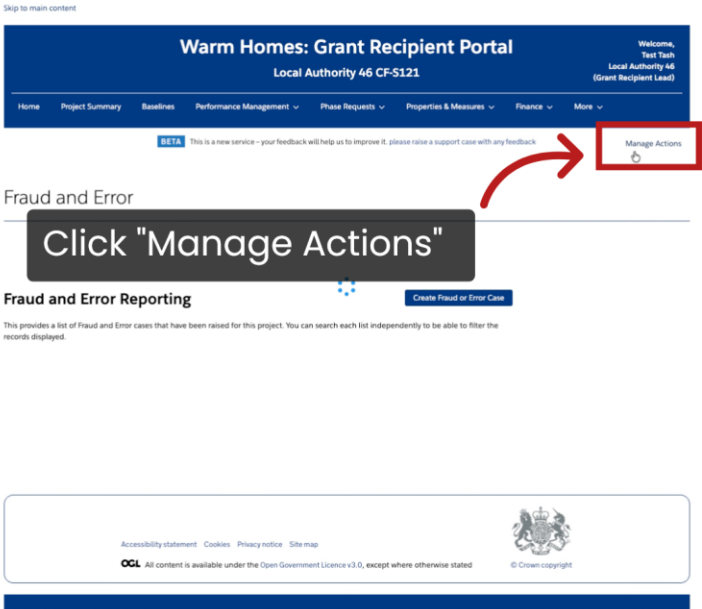
5. Open Fraud and Error Section

To access existing fraud records and related actions, click More, then navigate to the Fraud and Error area.



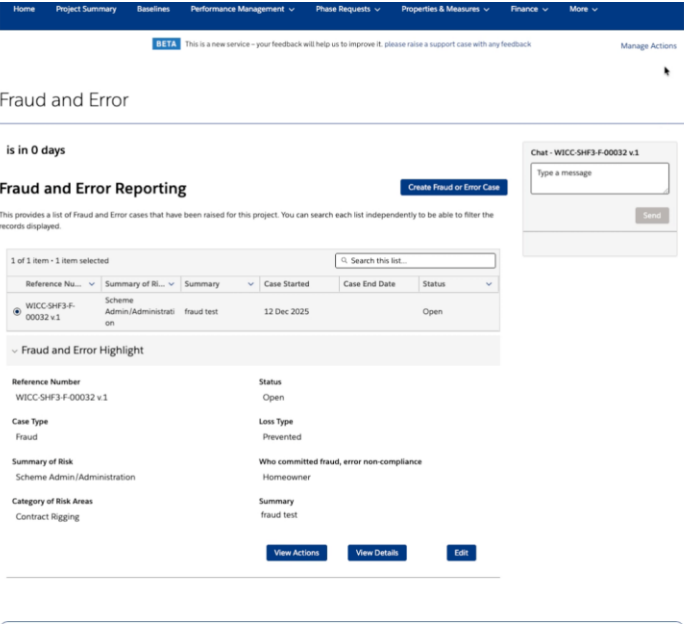
6. View Existing Fraud Actions

To view all Actions related to this Funding Award, select 'Manage Actions' in the top right-hand corner



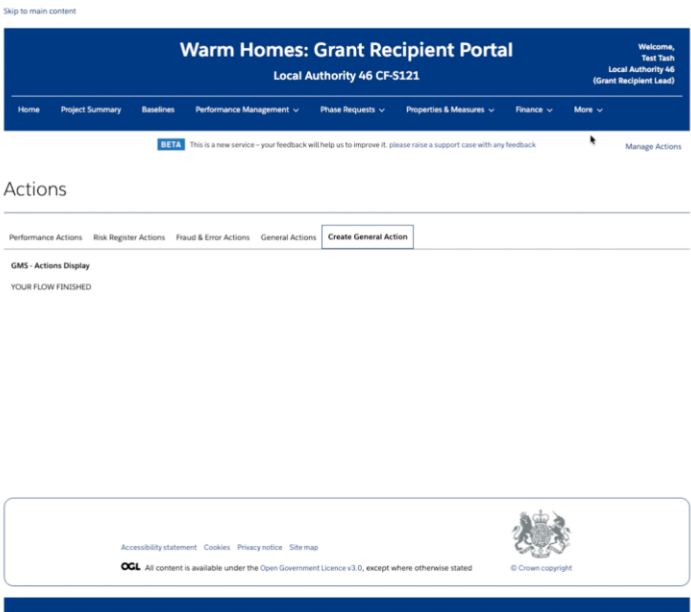
7. Understand Actions Overview

This navigates to show tabs for all Actions: performance actions, risk register actions, fraud and error actions, and general actions.

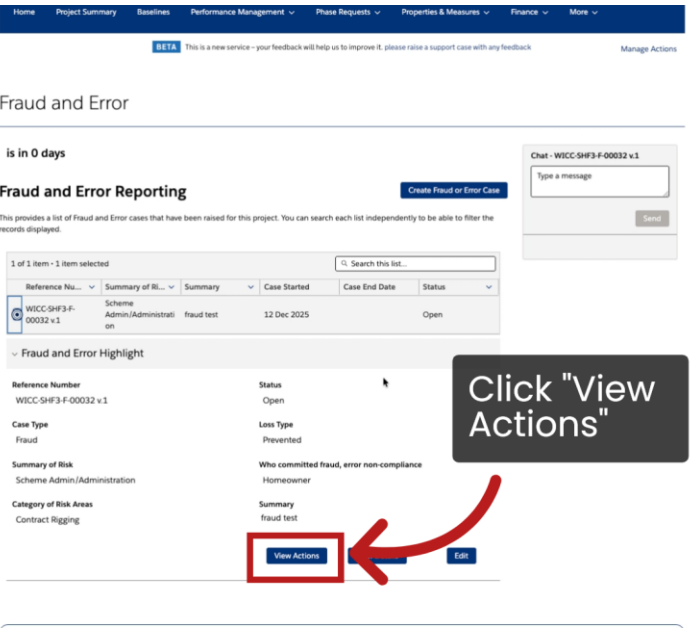


8. Select Funding Award for Specific Actions

To create or review Actions related to a specific Fraud record, Select the record,



9. View Actions for a Specific Fraud Record
and click 'View Actions'.



10. Review Actions Against Fraud Record

In this example, two actions have already been created for this fraud record: one open, and one overdue.

Home Project Summary Baselines Performance Management Phase Requests Properties & Measures Finance 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

Fraud and Error

is in 0 days

Fraud and Error Reporting

This provides a list of Fraud and Error cases that have been raised for this project. You can search each list independently to be able to filter the records displayed.

Fraud Actions

Available Actions

☒ Edit Action ☐ Create New Action

2 of 2 items - 0 items selected Search this list

Ref.	Title	Due Date	Status
ACT-00209	Action on Fraud (Internal)	13 Dec 2025	Open
ACT-00208	Action for fraud	11 Dec 2025	Overdue

Next

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11. Decide to Create New Action

From here, you can Create or Edit existing Actions. We will start with creating a new one. First, click: 'Create New Action', then, click: 'Next'.

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12. Name the New Fraud Action

Click the Action Title to name the Action. We will name this one, "Fraud Action 3".

The screenshot shows the 'Fraud and Error Reporting' form. The 'Action Title' field is highlighted with a red box, and a red arrow points to it from a dark grey callout box containing the text 'Click "Action Title"'. The form includes a navigation bar at the top with links like Home, Project Summary, Baselines, Performance Management, Phase Requests, Properties & Measures, Finance, and More. Below the navigation bar, there's a 'BETA' banner and a 'Manage Actions' link. The main heading is 'Fraud and Error', followed by 'is in 0 days'. The 'Fraud and Error Reporting' section provides a list of fraud and error cases. The form fields include 'Action Title' (highlighted), 'Action Description', 'Due Date (leave blank if action has no deadline)', and 'Owning Team'. A 'Create Fraud or Error Case' button is visible. At the bottom, there's a footer with accessibility statements, cookies, privacy notice, site map, and OGL (Open Government Licence) information.

13. Enter Action Description

Click the Action Description field to enter details about the new fraud action.

The screenshot shows the 'Fraud and Error Reporting' form. The 'Action Description' field is highlighted with a red box, and a red arrow points to it from a dark grey callout box containing the text 'Click "*Action Description"'. The form includes a navigation bar at the top with links like Home, Project Summary, Baselines, Performance Management, Phase Requests, Properties & Measures, Finance, and More. Below the navigation bar, there's a 'BETA' banner and a 'Manage Actions' link. The main heading is 'Fraud and Error', followed by 'is in 0 days'. The 'Fraud and Error Reporting' section provides a list of fraud and error cases. The form fields include 'Action Title', 'Action Description' (highlighted), 'Due Date (leave blank if action has no deadline)', and 'Owning Team'. A 'Create Fraud or Error Case' button is visible. At the bottom, there's a footer with accessibility statements, cookies, privacy notice, site map, and OGL (Open Government Licence) information.

14. Proceed with Action Description Entry

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Fraud and Error

is in 0 days

Fraud and Error Reporting

This provides a list of Fraud and Error cases that have been raised for this project. You can search each list independently to be able to filter the records displayed.

Parent Record: Fraud F-00032
Creation Date: 12 December 2025
Created by: Test Tash

Action Title @
Fraud action 3

Action Description @
Fraud action 3

Due Date (leave blank if action has no deadline)
@

Owning Team
--None--

Previous Next

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15. Complete Action Details

Add a due date as required.

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Action Description @
Fraud action 3

Due Date (leave blank if action has no deadline)
@

Owning Team
--None--

Previous Next

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16. Choose Owning Team Option

Assign an Owning Team. There are 3 options here. Choose 'Grant Recipient Lead' to assign the action to yourself, choose Delivery Partner to assign the action to your PSO. And only choose Scheme Lead, if you need to assign the Action directly to DESNZ. It is also important to note, that any user, with one of these roles on the Funding Award, will have permission to view or edit any action associated with it (even if owned by another team).

Home Project Summary Baselines Performance Management Phase Requests Properties & Measures Finance More

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Fraud and Error

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Fraud and Error Reporting

Create Fraud or Error Case

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Creation Date: 12 December 2025
Created by: Test Tash

Action Title @
Fraud action 3

Action Description @
Fraud action 3

Due Date (leave blank if action has no deadline)
13 Dec 2025

Owning Team
Grant Recipient Lead

Previous Next

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Type a message
Send

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Assign "Owning Team"

17. Advance to Next Step

Click Next to finish creating the Action.

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Fraud and Error

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Action Description @
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Due Date (leave blank if action has no deadline)
13 Dec 2025

Owning Team
Grant Recipient Lead

Previous **Next**

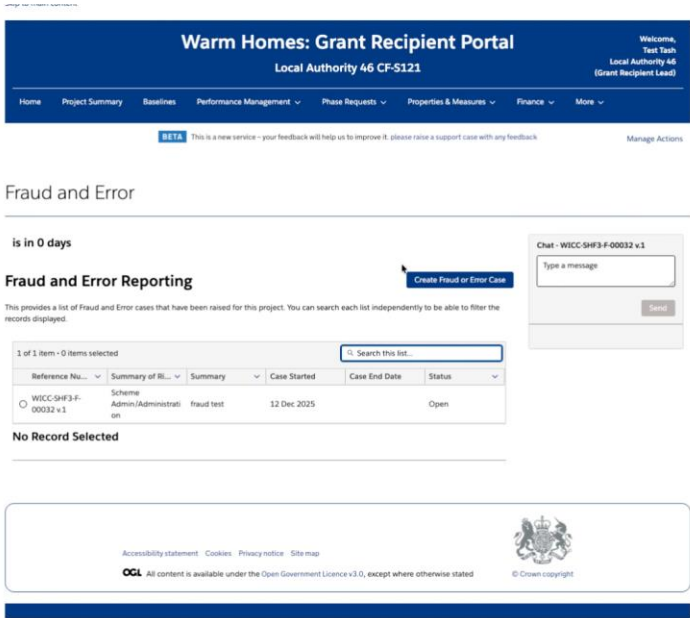
Chat - WICC-SHF3-F-00032 v.1
Type a message
Send

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Click "Next"

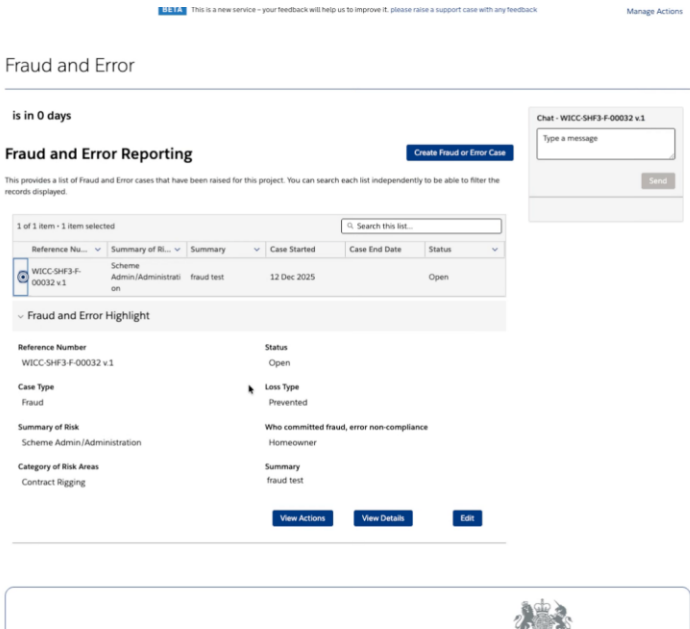
18. Verify Created Fraud Action Status

Let's select the Fraud record to review the Action we've just created.



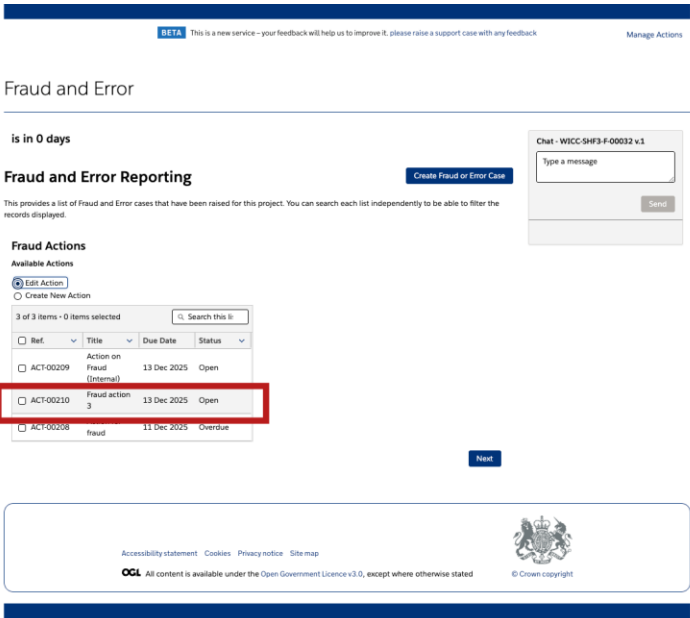
19. Select Fraud Action for Editing

Click "View Actions" to confirm that the fraud action has been created.



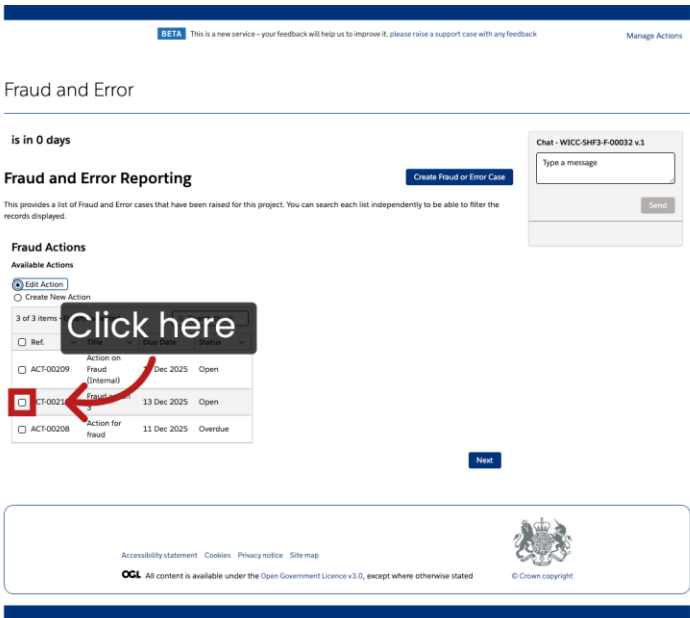
20. Open Action for Review

We can see 'Fraud action 3' created with the status of 'Open'.



21. Open Action for Review

Click here to select the fraud action for review or editing.



22. Edit Action Description

Click 'Edit Action' to update the record as needed.

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Manage Actions

Fraud and Error

is in 0 days

Fraud and Error Reporting

This provides a list of Fraud and Error cases that have been raised for this project. You can search each list independently to be able to filter the records displayed.

[Create Fraud or Error Case](#)

Chat - WCCC-SHF3-F-00032 v.1

Type a message

Send

Fraud Actions

Available Actions

☒ Edit Action
☐ Create New Action

3 of 3 items - 1 item selected

Search this list

Ref.	Title	Due Date	Status
ACT-00209	Action on Fraud (Internal)	13 Dec 2025	Open
ACT-00210	Fraud action 3	13 Dec 2025	Open
ACT-00208	Action for fraud	11 Dec 2025	Overdue

Form Status (select Edit to make changes)

☐ Read Only
☒ Edit Action

Award_Action_Parent Type: Fraud
Parent Record Ref: F-00032

Action Details

Date Created: 12 Dec 2025
Date Due: 13 Dec 2025
Owning Team:

Action Title: Fraud action 3

Description: Fraud action 3

Progress Update

Status:
Date Last Updated: 12 Dec 2025

23. Provide Progress Update

Click 'Edit Action' to change details on the record, such as entering a Progress Update, or amending the Title.

This provides a list of Fraud and Error cases that have been raised for this project. You can search each list independently to be able to filter the records displayed.

Send

Fraud Actions

Available Actions

☒ Edit Action
☐ Create New Action

3 of 3 items - 1 item selected

Search this list

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Form Status (select Edit to make changes)

☐ Read Only
☒ Edit Action

Award_Action_Parent Type: Fraud
Parent Record Ref: F-00032

Action Details

Date Created: 12 Dec 2025
Date Due: 13 Dec 2025
Owning team:

Action Title: Fraud action 3

Description: Fraud action 3

Progress Update

Status:
Date Last Updated: 12 Dec 2025

☒ Open
☐ Completed
☐ No Longer Needed
☐ Cancelled

Progress Update: No update provided yet

Click "Edit Action"

Click "Progress Update" to edit

24. Change date to past to see overdue logic

There is a background process that changes the Status to Overdue automatically once the due date passes. .

To show this logic, let's change the due date to a date in the past

records displayed.

Fraud Actions

Available Actions

☒ Edit Action
 ☐ Create New Action

3 of 3 Items - 1 Item selected

☒	Ref.	Title	Due Date	Status
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Form Status (select Edit to make changes):

☐ Read Only
 ☒ Edit Action

Award_Action_Parent Type

Fraud

Parent Record Ref

F-00032

Date Created

12 Dec 2025

Date Due

13 Dec 2025

Owning team

Action Title

Fraud action 3

Description

Fraud action 3

Progress Update

Status

☒ Open
 ☐ Completed
 ☐ No Longer Needed
 ☐ Overdue

Date Last Updated

12 Dec 2025

Progress Update

Progress has been made

Update Risk Actions

Click "Update Risk Actions" to save your changes.

☐ ACT-00209	Fraud (Internal)	13 Dec 2025	Open
☒ ACT-00210	Fraud action 3	13 Dec 2025	Open
☐ ACT-00208	Action for fraud	11 Dec 2025	Overdue

Award_Action_Parent Type
 Fraud

Parent Record Ref
 F-00032

Action Details
Date Created
 12 Dec 2025

Date Due
 11 Dec 2025

Action Title
 Fraud action 3

Description
 Fraud action 3

Progress Update
Status
☒ Open
☐ Completed
☐ No Longer Needed
☐ Overdue

Date Last Updated
 12 Dec 2025

Progress Update
 Progress has been made

Click "Update Risk Actions" to save

Update Risk Actions

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27. Observe Overdue Status

Let's go back to the Action to review our updates.

[Skip to main content](#)

Warm Homes: Grant Recipient Portal
 Local Authority 46 CF-S121

Welcome,
 Test User
 Local Authority 46
 (Grant Recipient Lead)

[Home](#) [Project Summary](#) [Baselines](#) [Performance Management](#) [Phase Requests](#) [Properties & Measures](#) [Finance](#) [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](#)

Fraud and Error
 is in 0 days

Fraud and Error Reporting

This provides a list of Fraud and Error cases that have been raised for this project. You can search each list independently to be able to filter the records displayed.

[Create Fraud or Error Case](#)

Chat - WICC-SH3-F-00032 v1
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28. Confirm Progress Update Saved

We can see that the status of the fraud action has automatically changed to Overdue. The 'Progress Update' we typed in has also been saved. This is how you track and manage actions on fraud cases.

Performance Actions Risk Register Actions **Fraud & Error Actions** General Actions Create General Action

Fraud Actions

3 of 3 items - 1 item selected

Ref.	Title	Due Date	Status
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Form Status (select Edit to make changes):
☒ Read Only
☐ Edit Action

Award_Action_Parent Type
 Fraud

Parent Record Ref
 F-00032

Action Details

Date Created
 12 Dec 2025

Date Due
 11 Dec 2025

Owning Team
 Grant Recipient Lead

Action Title
 Fraud action 3

Description
 Fraud action 3

Progress Update

Status
☐ Open
☐ Completed
☐ No Longer Needed
☒ Overdue

Progress Update
 Progress has been made

Date Last Updated
 12 Dec 2025

Updates have saved

29. Summary

This video helped you with: Creating, Tracking and Updating Actions for Fraud Cases in the Grant Recipient Portal. Understanding the Overdue status of Fraud Actions



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Summary

This video helped you with:

- Creating, Tracking and Updating Actions for Fraud Cases in the Grant Recipient portal
- Understanding the 'Overdue' status of Fraud Actions

30. Thank you for watching

Thanks for watching.



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Thank you
for watching

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