

Warm Homes: Grant Management System

Risk Management Enhancements for Grant Recipients

Reference: R2-03-G1 **Audience:** Grant Recipients **System:** Grant Recipient Portal
Version: November 2025 **Classification:** OFFICIAL

 **Note:** This guide uses DESNZ training-environment demo data and reflects the system as of November 2025. For the best experience, have the GR Portal open alongside this guide and refer to the training video as needed.

Overview

This training guide covers the Risk Management features available to Grant Recipients in the GR Portal:

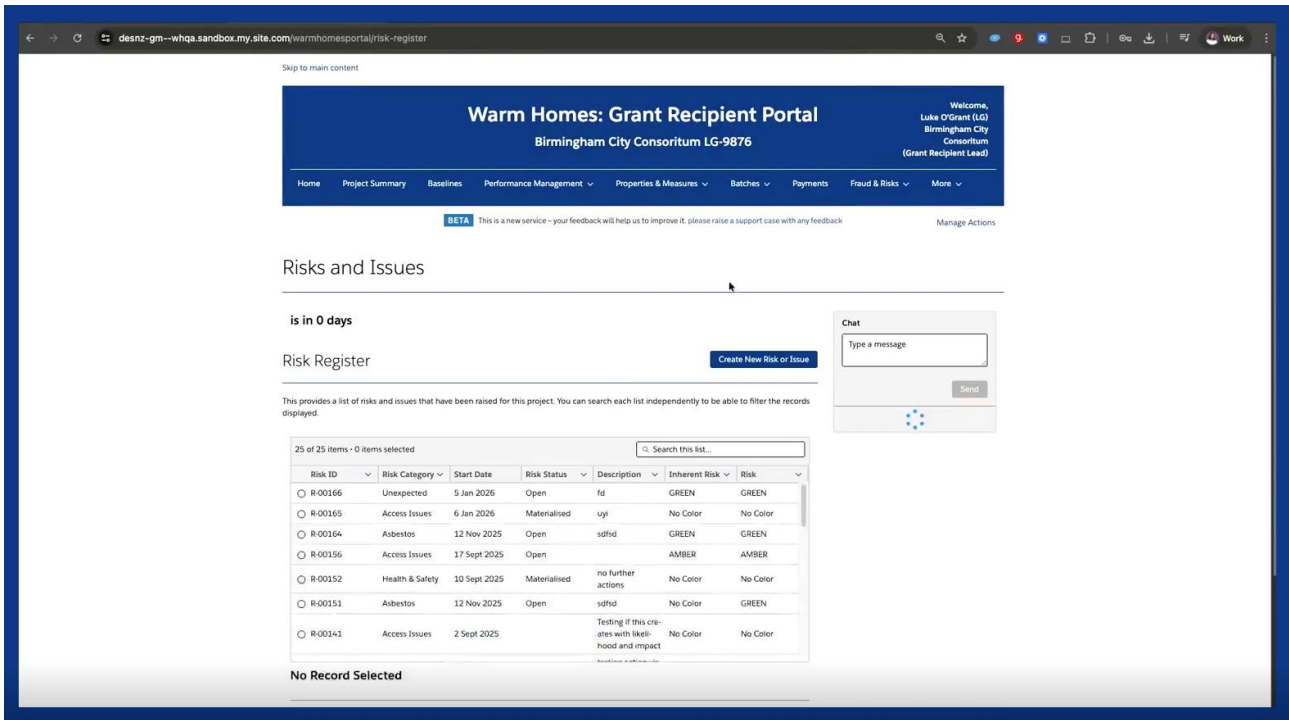
- Create a risk record and understand the distinctions between risk types
- Close a risk record
- Review risk actions assigned to you
- Create new actions related to a risk

The Risk Register in the GR Portal allows Consortium Leads to raise and track risks and issues related to their funding award. These records are visible to your PSO and can be linked to scheme-level risks by internal DESNZ teams.

Section 1: Create a Risk Record and Understand Risk Types

Step 1: Navigate to the Risk Register [Video: 0:50]

Log in to the Warm Homes Grant Recipient Portal. Navigate to the Risk Register by selecting Fraud & Risks from the top navigation menu and choosing Risk Register from the dropdown.



The screenshot shows the 'Warm Homes: Grant Recipient Portal' interface. The top navigation bar includes 'Home', 'Project Summary', 'Baselines', 'Performance Management', 'Properties & Measures', 'Batches', 'Payments', 'Fraud & Risks', and 'More'. The 'Fraud & Risks' dropdown is open, showing 'Risk Register'. The 'Risk Register' page displays a table of risk records. The table has 7 columns: Risk ID, Risk Category, Start Date, Risk Status, Description, Inherent Risk, and Risk. The table contains 7 records. A 'Create New Risk or Issue' button is visible. A chat window is open on the right.

Risk ID	Risk Category	Start Date	Risk Status	Description	Inherent Risk	Risk
R-00166	Unexpected	5 Jan 2026	Open	fd	GREEN	GREEN
R-00165	Access Issues	6 Jan 2026	Materialised	uyi	No Color	No Color
R-00164	Asbestos	12 Nov 2025	Open	sdtd	GREEN	GREEN
R-00156	Access Issues	17 Sept 2025	Open		AMBER	AMBER
R-00152	Health & Safety	10 Sept 2025	Materialised	no further actions	No Color	No Color
R-00151	Asbestos	12 Nov 2025	Open	sdtd	No Color	GREEN
R-00141	Access Issues	2 Sept 2025		Testing if this creates with likely hood and impact	No Color	No Color

Screenshot: GR Portal – Risks and Issues page showing the Risk Register table with existing risk records



The Risk Register page displays a table of all risks and issues raised for your funding award. Key fields visible at a glance include Risk ID, Risk Category, Start Date, Risk Status, Description, Inherent Risk, and Current Risk. You can search the list independently to filter records as needed.

Step 2: Create a New Risk or Issue [\[Video 1:25\]](#)

Click the Create New Risk or Issue button to begin. The first field to complete is Risk Type. There are three options, and the choice you make determines how the record behaves:

- Issue – the Risk Status automatically defaults to Materialised. Use this for risks that have already occurred.
- Threat – the Risk Status defaults to Open. Use this for risks that could occur in future.
- Opportunity – Status can be manually set to Open. Use this for positive developments that could be captured.

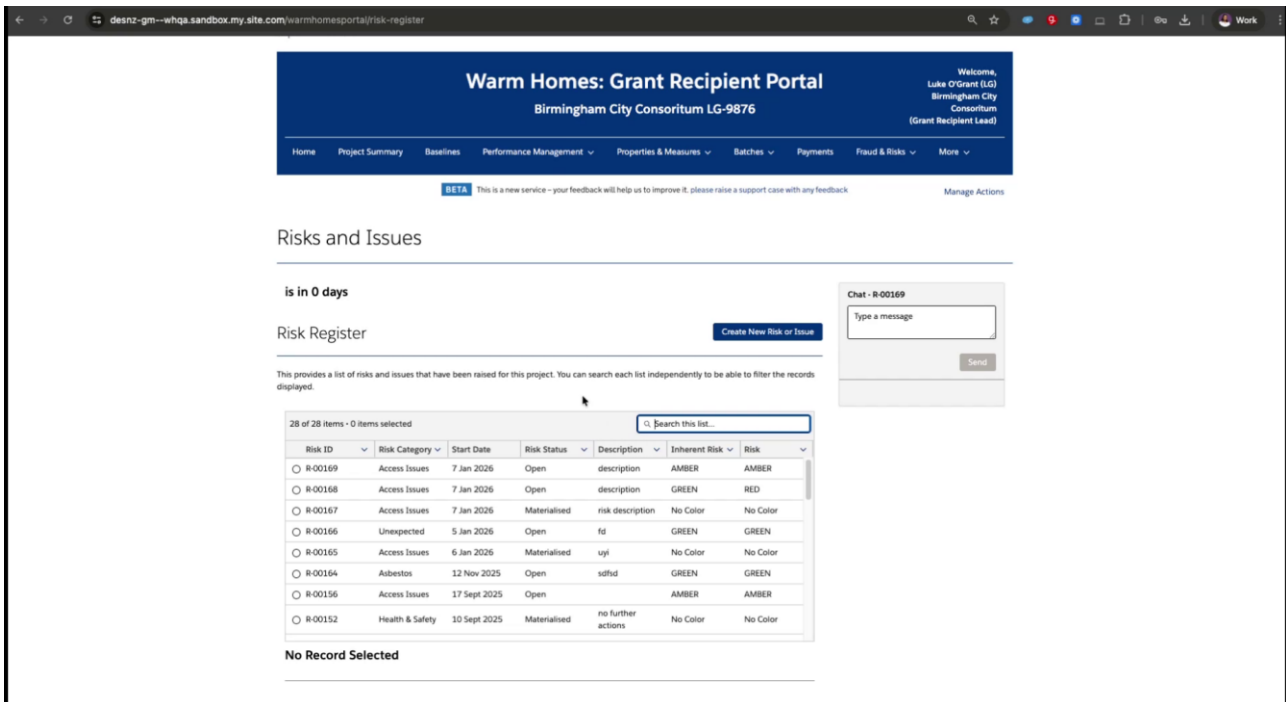
Note: Issues do not have Likelihood and Impact fields. These only apply to Threats and Opportunities, where Impact multiplied by Likelihood calculates your overall risk score. The Inherent Risk is captured when the record is first created and will never change. The Current Risk will update automatically if you edit the Likelihood or Impact fields later.

Screenshot: Create Risks and Issues - only Threats and Opportunities have Likelihood and Impact fields

Complete all mandatory fields:

- Risk Category – select the appropriate category for your risk.
- Risk Reporting Period Start Date – must be today or a date in the past (cannot be more than a year before today's date).
- Risk Owner – select Lead Project Manager, Contractor, Delivery Partner, or Other. Selecting Other will prompt a Risk Owner Details field.
- Risk Description, Cause, Effect, and Contingency Plans – all mandatory narrative fields.

Select Next to reach the summary page, where you can review your inputs. You will then be asked if you want to create related actions – you can select No Further Actions Required and click Finish to save the record.



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

Welcome, Luke O'Grant (LG) Birmingham City Consortium (Grant Recipient Lead)

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

Risks and Issues

is in 0 days

Risk Register [Create New Risk or Issue](#)

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

28 of 28 items - 0 items selected

Risk ID	Risk Category	Start Date	Risk Status	Description	Inherent Risk	Risk
☐ R-00169	Access Issues	7 Jan 2026	Open	description	AMBER	AMBER
☐ R-00168	Access Issues	7 Jan 2026	Open	description	GREEN	RED
☐ R-00167	Access Issues	7 Jan 2026	Materialised	risk description	No Color	No Color
☐ R-00166	Unexpected	5 Jan 2026	Open	fd	GREEN	GREEN
☐ R-00165	Access Issues	6 Jan 2026	Materialised	uyi	No Color	No Color
☐ R-00164	Asbestos	12 Nov 2025	Open	sdfsd	GREEN	GREEN
☐ R-00156	Access Issues	17 Sept 2025	Open		AMBER	AMBER
☐ R-00152	Health & Safety	10 Sept 2025	Materialised	no further actions	No Color	No Color

No Record Selected

Chat - R-00169
Type a message
[Send](#)

Screenshot: Risk Register showing newly created risk records (R-00167, R-00168, R-00169) with RAG ratings and Inherent/Current Risk fields populated

Section 2: Close a Risk Record

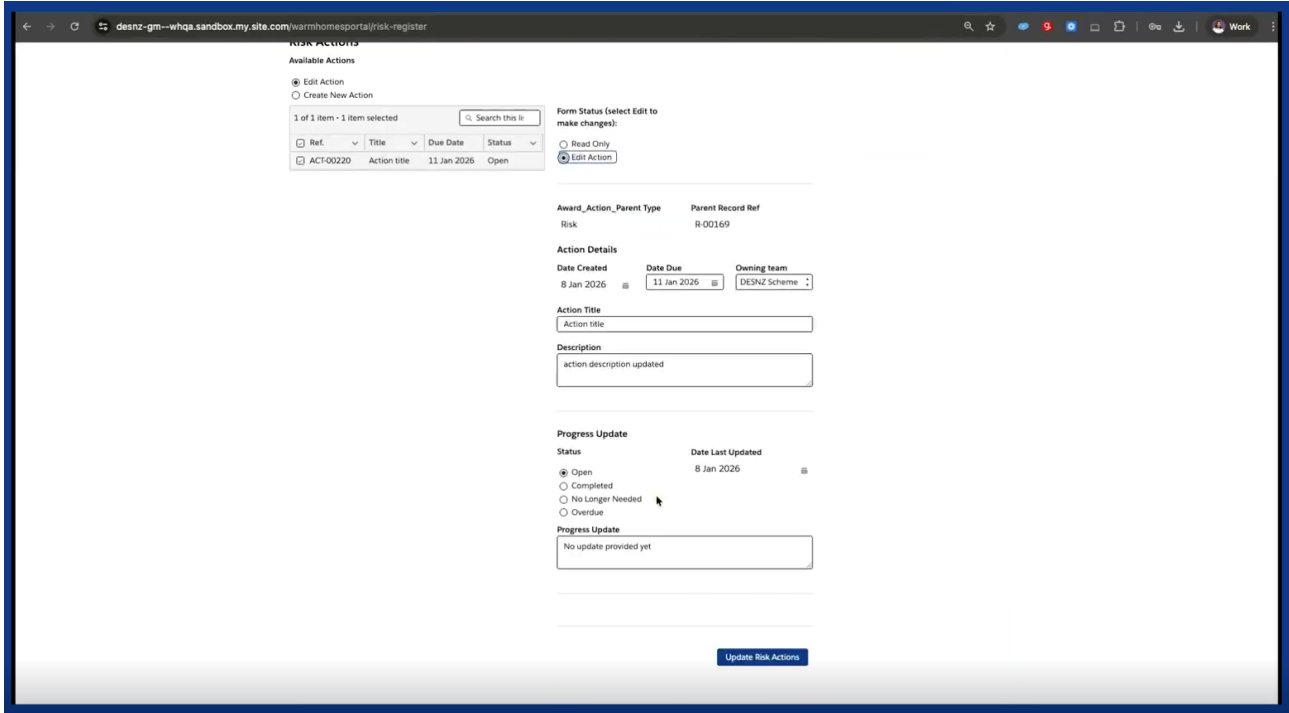
Step 3: Close a Risk with Open Actions [\[Video 9:57\]](#)

Before closing a risk, all related actions must be resolved. If you attempt to change the status of a risk to Closed while it still has open actions, the Closed option will not be available in the Risk Status dropdown.

To resolve this:

- Navigate to the related action from within the risk record.
- Edit the action and change its status to Completed.
- Enter a mandatory Resolution Date before saving.
- Return to the risk record – the Closed status will now be available.

When closing a risk, you must also provide a mandatory Reason for Risk Closure. After saving, the record will display a Closed status and all related actions will be shown as completed.



RISK ACTIONS

Available Actions

1 of 1 item - 1 item selected

Ref.	Title	Due Date	Status
ACT-00220	Action title	11 Jan 2026	Open

Form Status (select Edit to make changes):

☐ Read Only ☒ Edit Action

Award Action Parent Type: Risk Parent Record Ref: R-00169

Action Details

Date Created: 8 Jan 2026 Date Due: 11 Jan 2026 Owning team: DESNZ Scheme

Action Title:

Description:

Progress Update

Status: ☒ Open ☐ Completed ☐ No Longer Needed ☐ Overdue

Date Last Updated: 8 Jan 2026

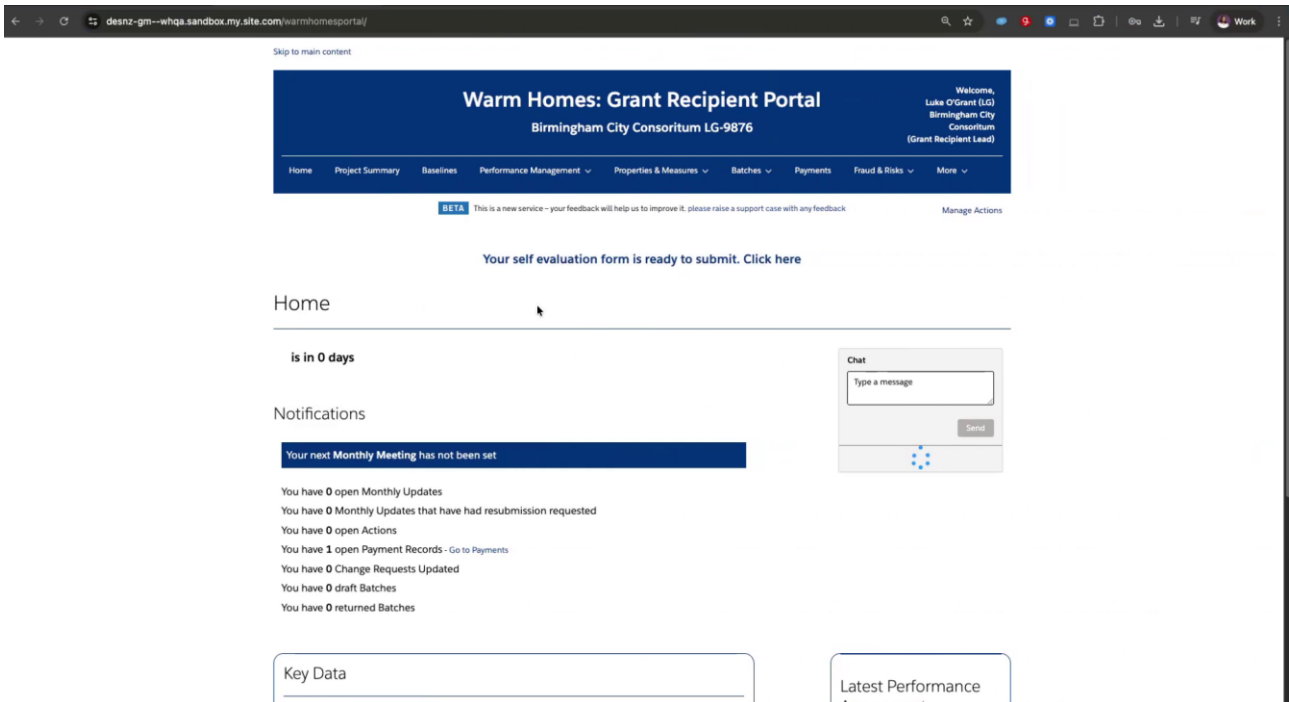
Progress Update:

[Update Risk Actions](#)

Section 3: Review Risk Actions Assigned to You

Step 4: Access the Manage Actions Area [Video 11:36]

To see all actions assigned to you or your team, navigate to Manage Actions in the top-right corner of the GR Portal. This area shows actions categorised by type: Performance, Risk Register, Fraud and Error, and General Actions.



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Birmingham City Consortium LG-9876

Welcome, Luke O'Grant (LG) Birmingham City Consortium (Grant Recipient Lead)

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

[Manage Actions](#)

Your self evaluation form is ready to submit. [Click here](#)

Home

is in 0 days

Notifications

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
You have 0 returned Batches

Key Data

Latest Performance Assessment

Screenshot: GR Portal Homepage – the Manage Actions link appears in the top-right of the navigation bar



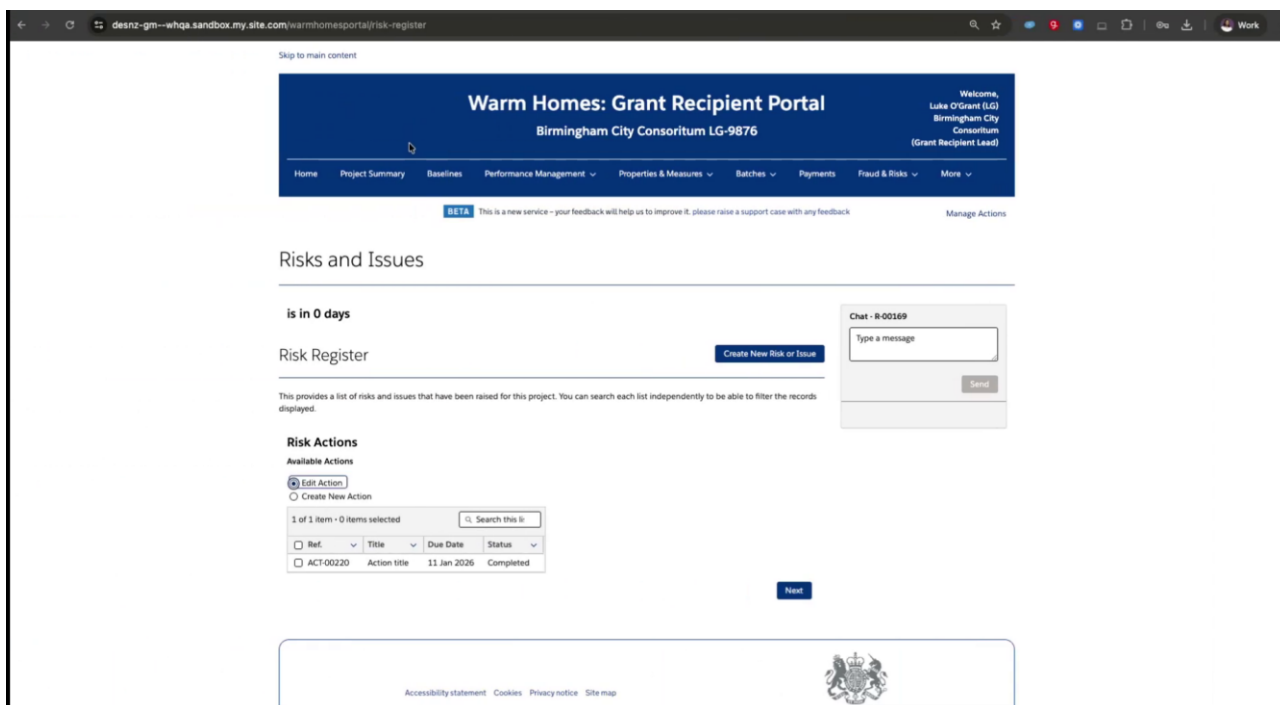
Select Risk Register Actions to see all actions related to your funding award. Each action shows the owning team and the assigned user. If the Owning Team on an action is Grant Recipient Lead, this confirms it is an action you can access and edit directly by clicking the Edit Action radio button.

 **Note:** When browsing the actions list, you must deselect the currently selected record before selecting another. Only one record can be viewed at a time in this panel.

Section 4: Create New Actions Related to a Risk

Step 5: Add an Action from a Risk Record [\[Video 12:54\]](#)

Open the risk record you want to add an action to and click the View Actions button. This opens a table showing all related actions for that risk. From here you can edit existing items or create new ones.



Screenshot: Risk Register – Risk Actions section showing the Edit Action and Create New Action options, with an existing completed action (ACT-00220)

Select Create New Action and click Next. Complete the required fields:

- Action Title – a clear description of the action required.
- Description – further detail on the action.
- Due Date – optional, but recommended to track progress.
- Owning Team – select from Delivery Partner, Designer, Scheme Lead, or Grant Recipient Lead. To assign the action to yourself, select Grant Recipient Lead.

Click Next to save. When you reopen the risk record and click View Actions, the new action will appear in the table showing its title, creation date, due date, and an Open status. To make changes, select the Edit Action radio button to open the editable fields.

Quick Reference Summary



Task	Where / How
Find the Risk Register	Fraud & Risks → Risk Register
Create a risk	Risk Register page → Create New Risk or Issue
Risk types	Issue = Materialised (no RAG), Threat/Opportunity = Open (RAG scored)
Close a risk	Resolve all open actions first, then edit Risk Status to Closed
View actions assigned to you	Manage Actions (top right) → Risk Register Actions
Create a new action	Open risk record → View Actions → Create New Action

For support with the Risk Register, contact your PSO or raise a support case via the GR Portal.