

A central image showing a person in a dark suit holding a tablet. The image is semi-transparent and overlaid with various white icons representing data, technology, and business processes, such as a bar chart, a gear, a document with a magnifying glass, and a checklist. The background of the entire page is a dark blue gradient with large, abstract green leaf shapes on the right side.

# ABS user guide

**May 2024**

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# How to create a new batch

1 Navigate to <https://abs-salix.kissflow.com/>

2 Click "+ New Application"

The screenshot shows the salix LA Homepage dashboard. At the top, there are navigation links for 'My Applications' and 'Project Applications', and the salix logo. The main header area contains a '+ New Application' button, which is highlighted with a red rectangular box. Below the header, there are five summary cards: 'Created this month', 'Awaiting DR Approval' (0), 'Awaiting OP Approval' (0), 'Total Approved' (0), and 'Total Batches' (0). Below these cards is a section titled 'Assigned To Me' with a filter bar showing 'Draft' (2), 'In progress', 'Participated', 'Completed', 'Withdrawn', and 'Rejected'. There is also a search bar, a filter dropdown, and a 'Show/hide fields' option. Below the filter bar is a table with columns: 'Name', 'Created at', 'Batch submitted by', 'Project ID', '2A. The lead LA affirms th...', and 'db Social h...'. The table contains two entries: 'S Demo for Castle Point District Council' (Created at: 20/03/2024, 14:56; Batch submitted by: Castle Point District Council; Project ID: T\_0001; 2A: Yes) and 'S Demo for' (Created at: 20/03/2024, 14:54; 2A: No). At the bottom, there is a pagination bar showing 'Showing 1 to 2 out of 2 entries' and a page number '1'.

3

### Select relevant financial year

The screenshot shows the 'Batch Application Form' interface. At the top, there are navigation links for 'me', 'My Applications', and 'Project Applications'. The page title is 'Batch Application Form'. Below the title, there is a 'Project' section with the instruction 'Let's start by telling us which financial year you need funding for'. A dropdown menu for 'Financial year\*' is open, showing two options: '2023/4' and '2024/5'. The '2024/5' option is highlighted with a red border. To the right of the dropdown, there are three buttons: 'Save', 'Discard', and 'Submit for QR Review'. On the far right, there are icons for 'Details' and 'Comments'.

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### Select project ID

The screenshot shows the 'Batch Application Form' interface. The 'Financial year\*' dropdown is now closed and shows '2024/5'. Below it, the 'Project ID' search field is active, and a search results table is displayed. The table has two columns: 'Project ID' and 'Home funded'. The first row shows 'T\_0001' and '1500'. Below the table, the 'Project name' is listed as 'Test Project'. To the right of the search results, there are three buttons: 'Save', 'Discard', and 'Submit for QR Review'. On the far right, there are icons for 'Details' and 'Comments'.

Project ID	Home funded
T_0001	1500

Project name  
Test Project

5

Select the council you are submitting on behalf of

My Applications Project Applications

LA Homepage

### Batch Application Form

**Batch details**

Project ID: T\_0001 Batch ID: Not yet assigned

**Organisation**

Batch description: ABS Demo for

Batch submitted by \*

- Adur District Council
- Castle Point District Council

Council Name

No data found

1 more rows

6

To include homes from another council on to the batch, click "Add" and select council from drop down options

Batch submitted by \*

Adur District Council

### Other Councils

Please add other councils contributing to this batch to the table below

<input type="checkbox"/>	Council Name
	No data found
<input type="button" value="Add"/>	1 more rows

### Terms

All of the terms below will need to be agreed to for a batch application to eligible for submission. You may press the 'Yes to all' b

2A. The lead LA affirms that all houses submitted as part of this batch have received 2B. The lead LA affirms that all houses

7

## Agree batch terms

**Other Councils**

Please add other councils contributing to this batch to the table below Delete

	Council Name
1	Castle Point District Council

Add 1 more rows

**Terms**

All of the terms below will need to be agreed to for a batch application to be eligible for submission. You may press the "Yes to all" button to accept all the affirmations in a single click.

Yes to all

2A. The lead LA affirms that all houses submitted as part of this batch have received retrofit assessments and a medium term improvement plan from a retrofit coordinator

Yes No

2B. The lead LA affirms that all houses submitted as part of this batch have consented to receive measures

Yes No

2C. The lead LA affirms that the batch meets the scheme's desired EPC aspirations to improve EPC band F-G homes to at least band D and EPC band E-D homes to band C, and/or where this target is not possible takes a fabric first and value for money approach

Yes No

2D. The lead LA affirms that a Space Heating Demand target of 90 kWh/m<sup>2</sup>/year has been considered in the development of retrofit plans for each household submitted as part of this batch

2E. The lead LA understands that by DESNZ approving the details specified in this batch application form, an Addendum may be attached to the Memorandum of Understanding pertaining to any details outlined in this form.

2F. The lead LA understands that by DESNZ approving the details specified in this batch application form, it will be drawing down on funding allocated to the project in the Memorandum of Understanding.

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## Add batch property details

**Batch property types**

Please click the blue 'add' button in the table to add rows of information about the properties being upgraded in this batch. For each row, you should add the tenure type, property type, wall type, the number of homes in category, and number of those homes heated by fossil fuel heating systems (oil, liquid petroleum gas, solid fuels) instead of electric. Once these property types are added, you will be able to add the relevant costs in the 'batch funding' table below.

	Ownership type *	Property type *	Wall type *	Number of homes *	Number of fossil fuel homes *
No data found					

Add more rows

9

- Select ownership type
- Select property type
- Select wall type
- Insert number of homes and number of fossil fuel homes

**Batch property types**

Please click the blue 'add' button in the table to add rows of information about the properties being upgraded in this batch. For each row, you should add the tenure type, property type, wall type, the number of homes that fall into this category, and number of those homes heated by fossil fuel heating systems (oil, liquid petroleum gas, solid fuels) instead of electric. Once these property types are added, you will be able to add the relevant costs in the 'batch funding' table below. Delete

	Ownership type *	Property type *	Wall type *	Number of homes *	Number of fossil fuel homes *
1	Owner occupied				

Save Discard Submit for QR Review

Yes No

Yes No

Yes No

### Batch property types

Please click the blue 'add' button in the table to add rows of information about the properties being upgraded in this batch. For each row, you should add the tenure type, property type, wall type, the number of homes that fall into this category, and number of those homes heated by fossil fuel heating systems (oil, liquid petroleum gas, solid fuels) instead of electric. Once these property types are added, you will be able to add the relevant costs in the 'batch funding' table below.

Ownership type *	Property type *	Wall type *	Number of homes *	Number of fossil fuel homes *
Owner occupied	Flat			

- End terrace / semi-detached / detached
- Flat
- Mid terrace
- Park home

Save Discard Submit for GR Review

### Batch property types

Please click the blue 'add' button in the table to add rows of information about the properties being upgraded in this batch. For each row, you should add the tenure type, property type, wall type, the number of homes that fall into this category, and number of those homes heated by fossil fuel heating systems (oil, liquid petroleum gas, solid fuels) instead of electric. Once these property types are added, you will be able to add the relevant costs in the 'batch funding' table below.

Ownership type *	Property type *	Wall type *	Number of homes *	Number of fossil fuel homes *
Owner occupied	Flat			

- Cavity
- Solid

Save Discard Submit for GR Review

ation about the properties being upgraded in this batch. For each row, you should add the tenure type, property type, wall type, the number of homes g systems (oil, liquid petroleum gas, solid fuels) instead of electric. Once these property types are added, you will be able to add the relevant costs in

Wall type *	Number of homes *	Number of fossil fuel homes *
Cavity	1	

## 10 To add add batch funding, click "Add"

For each property type you will need to add up to two rows; one row to record the energy efficiency costs and one row to record the low carbon heat costs to reflect the dual cost caps for HUG 2. The exception to this is park homes, which only has one combined cost cap and therefore one row to be added.

**Batch Application Form**

Please click the blue 'add' button to add rows in the table of information on your costs per property type (selected above). For each property type you will need to add up to two rows; one row to record the energy efficiency costs and one row to record the low carbon heat costs to reflect the dual cost caps for HUG 2. The exception to this is park homes, which only has one combined cost cap and therefore one row to be added.

Your costs in this table should include and be the sum of all the costs in the 'batch measures' table, the 'batch additional capital expenditure table' and the 'batch upfront capital expenditure table' further down in the form. The platform will flag to you if these costs do not align.

In each row, you should only state the number of homes utilizing the given cost cap, rather than the total number of homes of this property type included in the batch (which may be higher). For example, if 5 out of the 7 homes of a particular property type are receiving low carbon heating, you should input '5'.

For upgrades receiving cost contributions from private or social landlords, you will need to state the total costs first (grant contribution + landlord contribution), and then state the grant contribution in the following column, titled 'cost from grant', to show the total subsidy you will be drawing down from HUG 2.

Under HUG 2, averaging of cost caps is allowed for each property type. This means batch costs for each category will be cumulatively totalled across the project to date - where a cost cap is exceeded, the batch will be rejected. As a result, batch cost averaging should become easier over time.

The platform will flag to you if you are breaching any cost caps cumulatively across all batches received to date, or if you are breaching the minimum contribution required from landlords.

You must place the specific measure costs with the appropriate home type/s receiving those measures. However, you have flexibility to decide where (which property type rows) to add other 'batch additional capital expenditure' and 'batch upfront capital expenditure' such as PAS costs.

Home type *	Grant type *	Number of ho...	Total costs	Costs from gran...	Total costs (com...	Grant costs compiled	Cost cap complet
No data found							

**Add** more rows

**LSOA Eligibility**

Households not heated by mains gas (off-gas grid), with an EPC rating of D or below will be automatically eligible for HUG funding if they are located in Lower Layer Super Output Areas (LSOAs) ranked between 1-3 of the Income Decile classification under IMD. LAs will not be expected to verify the income of these households, provided they can provide evidence that they are located within the LSOA and meet the other criteria for HUG eligibility.

The purpose of these questions is to understand the roll-out of the IMD route and how it has been applied under HUG 2. Batches that use the IMD eligibility route will not be scored more highly, nor will they receive higher levels of funding.

## 11 Add home type Add grant type Insert number of homes, and total costs

**Batch Application Form**

Please click the blue 'add' button to add rows in the table of information on your costs per property type (selected above). For each property type you will need to add up to two rows; one row to record the energy efficiency costs and one row to record the low carbon heat costs to reflect the dual cost caps for HUG 2. The exception to this is park homes, which only has one combined cost cap and therefore one row to be added.

Your costs in this table should include and be the sum of all the costs in the 'batch measures' table, the 'batch additional capital expenditure table' and the 'batch upfront capital expenditure table' further down in the form. The platform will flag to you if these costs do not align.

In each row, you should only state the number of homes utilizing the given cost cap, rather than the total number of homes of this property type included in the batch (which may be higher). For example, if 5 out of the 7 homes of a particular property type are receiving low carbon heating, you should input '5'.

For upgrades receiving cost contributions from private or social landlords, you will need to state the total costs first (grant contribution + landlord contribution), and then state the grant contribution in the following column, titled 'cost from grant', to show the total subsidy you will be drawing down from HUG 2.

Under HUG 2, averaging of cost caps is allowed for each property type. This means batch costs for each category will be cumulatively totalled across the project to date - where a cost cap is exceeded, the batch will be rejected. As a result, batch cost averaging should become easier over time.

The platform will flag to you if you are breaching any cost caps cumulatively across all batches received to date, or if you are breaching the minimum contribution required from landlords.

You must place the specific measure costs with the appropriate home type/s receiving those measures. However, you have flexibility to decide where (which property type rows) to add other 'batch additional capital expenditure' and 'batch upfront capital expenditure' such as PAS costs.

Home type *	Grant type *	Number of ho...	Total costs	Costs from gran...	Total costs (com...	Grant costs compiled	Cost cap complet
HUG2_archetype_canon_A00 form.							

**LSOA Eligibility**

Households not heated by mains gas (off-gas grid), with an EPC rating of D or below will be automatically eligible for HUG funding if they are located in Lower Layer Super Output Areas (LSOAs) ranked between 1-3 of the Income Decile classification under IMD. LAs will not be expected to verify the income of these households, provided they can provide evidence that they are located within the LSOA and meet the other criteria for HUG eligibility.

The purpose of these questions is to understand the roll-out of the IMD route and how it has been applied under HUG 2. Batches that use the IMD eligibility route will not be scored more highly, nor will they receive higher levels of funding.

result, batch cost averaging should become easier over time.

The platform will flag to you if you are breaching any cost caps cumulatively across all batches received to date, or if you are breaching the minimum contribution required from landlords.

You must place the specific measure costs with the appropriate home type/s receiving those measures. However, you have flexibility to decide where (which property type rows) to add other 'batch additional capital expenditure' such as PAS costs.

Home type *	Grant type *	Number of ho...	Total costs	Costs from gran...	Total costs (com...	Grant costs complied	Cost cap complie
1 Owner occupied - Flat - Cavity	Energy efficiency				£ 0 GBP	£ 0 GBP	£ 1

**Funding Validation**  
Click the validate button to check the alignment between the Property table and the Funding table. This check will need to be repeated after either the Property or Funding tables are modified before a batch application can be submitted.

Tables last modified at:

cumulatively across all batches received to date, or if you are breaching the minimum contribution required from landlords.

home type/s receiving those measures. However, you have flexibility to decide where (which property type rows) to add other 'batch additional capita

Home type *	Number of ho...	Total costs	Costs from gran...
Energy efficiency	1		

**12** Add an additional row and complete fields

'batch upfront capital expenditure' such as PAS costs.

Home type *	Grant type *	Number of ho...	Total costs	Costs from gran...
1 Owner occupied - Flat - Cavity	Energy efficiency	1	3,000 GBP	

**Add** more rows

**13** Click "Run Validation"

Outcome fields:

- Green and "Pass" - please proceed with submission
- Red and "Fail"- please check comments to amend relevant fields above

**Funding Validation**  
Click the validate button to check the alignment between the Property table and the Funding table. This check will need to be repeated after either the Property or Funding tables are modified before a batch application can be submitted.

**Run Validation**

Tables last modified at:

**Outcome**  
Fail - number of homes is not aligned

**Batch measures**  
Please click the blue 'add' button to add rows of different measures included this batch. For each measure, please insert the number of measures and total quoted capital cost of installing these measures for homes within the batch. The table will calculate the average cost of measures for you.

Projects may install any SAP eligible measure in a property that is not fossil fueled. If the measure you require is not available, please contact your account manager to request the addition of this measure.

**Validate**



## 14 Add batch funding, click "Add"

**Batch measures**

Please click the blue "add" button to add rows of different measures included this batch. For each measure, please insert the number of measures and total quoted capital cost of installing these measures for homes within the batch. The table will calculate the average cost of measures for you.

Projects may install any SAP eligible measure in a property that is not fossil fueled. If the measure you require is not available, please contact your account manager to request the addition of this measure. Delete

<input type="checkbox"/>	Measure grade *	Measure type *	Measure name	Checking process	Number of measures *	Cost of measures *	Avg measure cost
No data found							

Add more rows

**Batch measures - Additional Details**

Please use this text box to add any additional measures you want the DP to consider, including the number, total cost and reason for this measure. Please also use this text box to explain if and why you have transferred low carbon heat costs to the energy efficiency cost cap.

Batch additional measures Additional measure supporting evidence

Attach files

**B I X X' φ π**

## 15 Select measure grade

**Batch measures**

Please click the blue "add" button to add rows of different measures included this batch. For each measure, please insert the number of measures and total quoted capital cost of installing these measures for homes within the batch. The table will calculate the average cost of measures for you.

Projects may install any SAP eligible measure in a property that is not fossil fueled. If the measure you require is not available, please contact your account manager to request the addition of this measure. Delete

<input type="checkbox"/>	Measure grade *	Measure type *	Measure name	Checking process	Number of measures *	Cost of measures *	Avg measure cost
1	<span style="border: 2px solid green; padding: 2px;">A</span>						

**Batch measures - Additional Details**

Please use this text box to add any additional measures you want the DP to consider, including the number, total cost and reason for this measure. Please also use this text box to explain if and why you have transferred low carbon heat costs to the energy efficiency cost cap.

Batch additional measures Additional measure supporting evidence

Attach files

**B I X X' φ π**

## 16 Select measure type Select measure name Insert number of measures and costs of measures

### Batch measures

Please click the blue 'add' button to add rows of different measures included this batch. For each measure, please insert the number of measures and total quoted capital cost of installing these measures for homes within the batch. The table will calculate the average cost of measures for you.

Projects may install any SAP eligible measure in a property that is not fossil fueled. If the measure you require is not available, please contact your account manager to request the addition of this measure.

Measure grade *	Measure type *	Measure name	Checking process	Number of measures *	Cost of measures *	Avg measure cost
1	A	Energy efficiency				

### Batch measures - Additional

Please use this text box to add any additional measures you want the DP to consider, including the number, total cost and reason for this measure. Please also use this text box to explain if and why you have transferred low carbon heat costs to the energy efficiency cost cap.

Batch additional measures

Additional measure supporting evidence

Attach files

s included this batch. For each measure, please insert the number of measures and total quoted capital cost of installing these measures for homes with not fossil fueled. If the measure you require is not available, please contact your account manager to request the addition of this measure.

Measure name	Checking process	Number of measures *	Cost of measures *
Flat Roof Insulation			

### Batch measures

Please click the blue 'add' button to add rows of different measures included this batch. For each measure, please insert the number of measures and total quoted capital cost of installing these measures for homes within the batch. The table will calculate the average cost of measures for you.

Projects may install any SAP eligible measure in a property that is not fossil fueled. If the measure you require is not available, please contact your account manager to request the addition of this measure.

Measure grade *	Measure type *	Measure name	Checking process	Number of measures *	Cost of measures *	Avg measure cost
1	A	Energy efficiency	Pre-approved	1		

### Batch measures - Additional Details

Please use this text box to add any additional measures you want the DP to consider, including the number, total cost and reason for this measure. Please also use this text box to explain if and why you have transferred low carbon heat costs to the energy efficiency cost cap.

Batch additional measures

Additional measure supporting evidence

Attach files



Alert when submitting Energy Efficiency top up!

Please ensure you are submitting the absolute number of measures in number of measures column.

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To add an additional row click "Add" and complete fields

### Batch measures

Please click the blue 'add' button to add rows of different measures included this batch. For each measure, please insert the number of measures and total quoted capital cost of installing these measures. The table will calculate the average cost of measures for you.

Projects may install any SAP eligible measure in a property that is not fossil fueled. If the measure you require is not available, please contact your account manager to request the addition of this measure.

<input type="checkbox"/>	Measure grade *	Measure type *	Measure name	Checking process	Number of measures *	Cost of measures
1	A	Energy efficiency	Flat Roof Insulation	Pre-approved	1	

Add

more rows

### Batch measures - Additional Details

Please use this text box to add any additional measures you want the DP to consider, including the number, total cost and reason for this measure. Please also use this text box to explain if and why you have transferred low carbon heat costs to the energy efficiency cost cap.

Batch additional measures

Additional measure supporting evidence

Attach files

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Please use this text box to:

- Add any **additional measures** you want the DP to consider, including the **number, total cost** and reason for this measure.
- Explain if and why you have transferred low carbon heat costs to the energy efficiency cost cap.
- Justify costs are higher than anticipated.

### Batch measures - Additional Details

Please use this text box to add any additional measures you want the DP to consider, including the number, total cost and reason for this measure. Please also use this text box to explain if and why you have transferred low carbon heat costs to the energy efficiency cost cap.

Batch additional measures

Additional measure supporting evidence

Attach files

Confirm measure meets conditions for an elevated grade \*

I confirm that this meets the conditions for a high retention storage heater to be grade B

Measure grade elevation evidence \*

Attach files



### Tip!

Provide as much information as possible in this field to reduce times with the escalation process.

Try and include:

- **Size of the property** (meterage & number of bedrooms)
- reasoning behind complexity of installation
- Whether the measure **complements** any other being installed
- **Why the measure is required**- provide reasoning on choice over another measure
- Why costs are **moved into A&A**- please note where possible, A&A costs should be split out of the measure cost.

For EE top ups please state:

- The **amount** of EE top up being used
- Which **archetypes** and **wall types** of EE top up is being used •

The measures that are being topped up

19

Click "Attach files" to submit any additional evidence  
You will be prompted confirm you meet the conditions and to provide additional justification for specific measures with an attachment.

### Tip!

Attachments must include:

#### **An image of an email, or PDF letter, signed by the Retrofit Coordinator (RC)**

- For **double glazing and energy efficient doors**, normally a grade C, these can sit as grade B if they are installed with a grade A measure, and are necessary for the install to be PAS compliant.
- For **High Retention Storage Heaters**, to be grade B, provide evidence they are non-fossil fuel and also state the main heating type

want the DP to consider, including the number, total cost and reason for this measure. Please also use this text box to explain if and why you have trans

Additional measure supporting evidence

Attach files

I X<sub>i</sub> X<sup>i</sup>  

h retention storage heater to be grade B

#### Batch Application Form

##### Batch measures - Additional Details

Please use this text box to add any additional measures you want the DP to consider, including the number, total cost and reason for this measure. Please also use this text box to explain if and why you have transferred low carbon heat costs to the energy efficiency cost cap.

Batch additional measures

XYZ

Additional measure supporting evidence

ABG 24-25.pdf

Attach files

I confirm that this meets the conditions for a high retention storage heater to be grade B.

Measure grade elevation evidence \* 

Attach files

20 Select relevant options in relation to all of the cost information you have provided in the batch form

#### Batch Application Form

Add 1 more rows

##### VAT

We do not expect that VAT should be included in any of the costs provided by Local Authorities in applications for HUG 2 Funding. This is because Local Authorities are not required to pay VAT on central government grant funding. VAT is applicable on goods purchased with grant funding. As LAs are able to recover VAT from HMRC, DESNZ do not expect VAT to be included in their proposals as to avoid grant payments being used for VAT, which is later recovered by the LA. Please answer the question in relation to all of the cost information you have provided in the batch form.

Are the costs you have provided inclusive of VAT?

Yes  No

Did you pay non-recoverable VAT on any of the goods and services you have included?

Yes  No

21

## Input indexes of multiple deprivation information

### LSOA Eligibility

Households not heated by mains gas (off-gas grid), with an EPC rating of D or below will be automatically eligible for HJG funding if they are located in Lower Layer Super Output Areas (LSOAs) ranked between 1-3 of the Income Decile classification under IMD. LAs will not be expected to verify the income of these households, provided they can provide evidence that they are located within the LSOA and meet the other criteria for HJG eligibility.

The purpose of these questions is to understand the roll-out of the IMD route and how it has been applied under HJG 2. Batches that use the IMD eligibility route will not be scored more highly, nor will they receive higher levels of funding.

A list of IMD eligible postcodes are available at [https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment\\_data/file/112487/hug-2-imd-eligible-postcodes.xlsx](https://assets.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/112487/hug-2-imd-eligible-postcodes.xlsx)

Indexes of multiple deprivation used?

Yes No

Number of homes identified through this route?

22

## Complete batch delivery start and end dates

### Batch delivery plans

Please let us know when you plan to start and finish work on this batch of homes. You must start within the financial year you have chosen for your project.

Estimated start date (FY 2024/25)

DD/MM/YYYY

Estimated completion date

DD/MM/YYYY

### Batch cost summary

Based on the information provided on homes and costs, we have calculated the total cost of upgrading the batch of homes submitted. We have then compared this to all of the expenditure that you have included in this batch. If there is a discrepancy between the estimated batch cost and your proposed expenditure, the cell will highlight in red. You should check your costs to ensure they align, if this occurs. Batches where costs do not align will not be accepted.

Total cost of upgrading this batch

£ 6,000

GBP

Your total proposed expenditure for this batch

£ 6,000

GBP

Upfront capital expenditure

£ 0

GBP

23

## Check batch cost summary

### Batch Application Form

Based on the information provided on homes and costs, we have calculated the total cost of upgrading the batch of homes submitted. We have then compared this to all of the expenditure that you have included in this batch. If there is a discrepancy between the estimated batch cost and your proposed expenditure, the cell will highlight in red. You should check your costs to ensure they align, if this occurs. Batches where costs do not align will not be accepted.

Total cost of upgrading this batch

£ 6,000

GBP

Your total proposed expenditure for this batch

£ 6,000

GBP

Upfront capital expenditure

£ 0

GBP

Net difference between costs and expenditure

£ 0.00

GBP

The amount of funding you are requesting to draw down

£ 0

GBP

24

Before you can submit your application, you need to resolve each of the 'red' flagged issues below.

Whilst you can submit a batch with 'yellow' or 'purple' issues flagged, these are extremely likely to cause the batch to be rejected, so we encourage you to fix these issues too before submitting.

If you would like help to submit your application, please contact your DP contact who can help you submit a batch.

#### Issues with your application

Before you can submit your application, you need to resolve each of the 'red' flagged issues below.

Whilst you can submit a batch with 'yellow' or 'purple' issues flagged, these are extremely likely to cause the batch to be rejected, so we encourage you to fix these issues too before submitting.

If you would like help to submit your application, please contact your DP contact who can help you submit a batch.

##### Grade A measures are less than 60% of your total expenditure

Your project has already submitted 0.0 GBP of grade A measure costs, adding 3000 GBP of grade A measure costs in this batch means that your total application for grade A measures is less than 60% of the total grant funding requested.

25

You are able to save your draft version of your batch by clicking "Save"

#### Issues with your application

Before you can submit your application, you need to resolve each of the 'red' flagged issues below.

Whilst you can submit a batch with 'yellow' or 'purple' issues flagged, these are extremely likely to cause the batch to be rejected, so we encourage you to fix these issues too before submitting.

If you would like help to submit your application, please contact your DP contact who can help you submit a batch.

##### Grade A measures are less than 60% of your total expenditure

Your project has already submitted 0.0 GBP of grade A measure costs, adding 3000 GBP of grade A measure costs in this batch means that your total application for grade A measures is less than 60% of the total grant funding requested.

Save

Discard

Submit for GR Review

26

Your draft batches can be accessed again under 'My Batches' where you will be able to amend any fields or information prior to submitting for review. This includes submitting and uploading any additional information

Home My Applications Project Applications

salix LA Homepage

+ New Application

Created this month 0

Awaiting GR Approval 0

Awaiting DP Approval 0

Total Approved 0

Total Batches 0

My Batches Assigned To Me

Draft In progress Participated Completed Withdrawn Rejected

Search Filter 5

<input type="checkbox"/>	Name	Created at	Batch submitted by	Project ID	
<input type="checkbox"/>	ABS Demo for Adur District Council	20/03/2024, 16:24	Adur District Council	T_0001	2A. The lead LA affirms th... Yes
2	ABS Demo for Castle Point District Council	20/03/2024, 14:56	Castle Point District Council	T_0001	Yes
3	ABS Demo for	20/03/2024, 14:54			No

27

To submit your batch for review, click "Submit for GR Review"

Issues with your application

Before you can submit your application, you need to resolve each of the 'red' flagged issues below.

Whilst you can submit a batch with 'yellow' or 'purple' issues flagged, these are extremely likely to cause the batch to be rejected, so we encourage you to fix these issues too before submitting.

If you would like help to submit your application, please contact your DP contact who can help you submit a batch.

Grade A measures are less than 60% of your total expenditure

Your project has already submitted 0.0 GBP of grade A measure costs, adding 3000 GBP of grade A measure costs in this batch means that your total application for grade A measures is less than 60% of the total grant funding requested.

Save Discard Submit for GR Review

# How to resubmit batch with amendments

1 Navigate to "Assigned To Me" tab

Home My Applications Project Applications

salix LA Homepage

Created this month: 0

Awaiting QR Approval: 1

Awaiting DP Approval: 0

Total Approved: 0

My Batches: Assigned To Me

Start

<input type="checkbox"/>	Name	Created at	Created by	Status	Batch submit
<input type="checkbox"/>	1 ABS Demo for Adur District Council	20/03/2024, 16:24	ABS Demo	In progress	Adur Distric

2

Click relevant batch

Home My Applications Project Applications

salix

LA Homepage

+ New Application

Created this month  
0Awaiting GP Approval  
1Awaiting DP Approval  
0Total Approved  
0Total Batches  
3

Batches Assigned To Me

art

Search

Filter

Show/Hide

<input type="checkbox"/>	Name	Created at	Created by	Status	Batch submitted by
<input type="checkbox"/>	ABS Demo for Adur District Council	20/03/2024, 16:24	AD ABS Demo	In progress	Adur District Council

3

Make required amendments to tables and fields

If different measures included this batch. For each measure, please insert the number of measures and total quoted capital cost of installing these measures to calculate the average cost of measures for you.

For a property that is not fossil fueled. If the measure you require is not available, please contact your account manager to request the addition of this measure.

Measure type *	Measure name	Checking process	Number of measures *	Cost of measures
Energy efficiency	Flat Roof Insulation	Pre-approved	1	
Low carbon heat	High Retention Storage H...	Pre-approved	1	

4

## You can also upload additional evidence documents and comments

ch Assessor sent this item back to you with the following notes:

im ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea modo consequat. Duis aute irure do

costs to the energy efficiency cost can

Batch additional measures

Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur. Excepteur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum.

**B** *I* ~~X~~ <sup>X</sup>

Additional measure supporting evidence

ABS 24-25.pptx

Evidence A.png

[Attach files](#)

Confirm measure meets conditions for an elevated grade \* ⓘ

I confirm that this meets the conditions for a high retention storage heater to be grade B

Measure grade elevation evidence \* ⓘ

ABS 24-25.pptx

Evidence B.png

[Save](#)

5

## Click "Save"

icil

to you with the following notes:

iscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea

ails

asures you want the DP to consider, including the number, total cost and reason for this measure. Please also use this text box to explain if and why you have transferred low carbon heat

Additional measure supporting evidence

ABS 24-25.pptx

Evidence A.png

[Attach files](#)

ted grade \* ⓘ

ns for a high retention storage heater to be grade B

[Save](#) [Submit](#)

6

Click "Submit"

we encourage you to fix these issues too before submitting.

Save

Submit

7

Your batch has now been resubmitted and can viewed in the "in progress" tab

Draft 5

In progress 3

Participated

Completed

Withdrawn

Rejected

Created at ▾

Batch submitted by ▾

Project ID ▾

21/03/2024, 12:07

20/03/2024, 14:56

Castle Point District Council

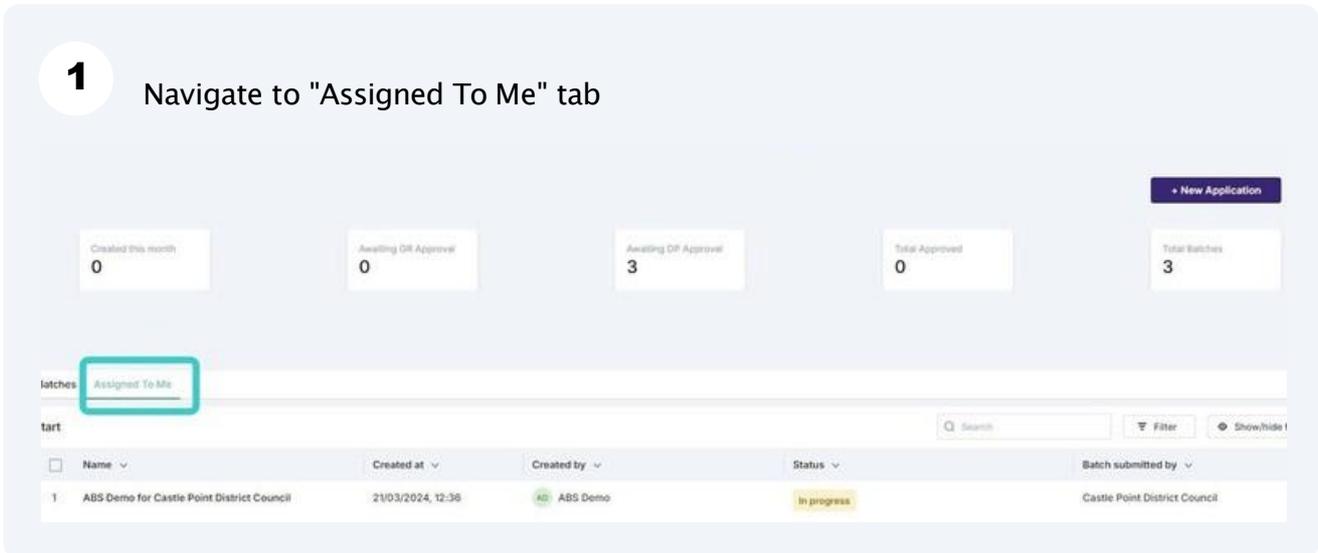
T\_0001

20/03/2024, 14:54

# How to resubmit a batch with additional comments

1

Navigate to "Assigned To Me" tab

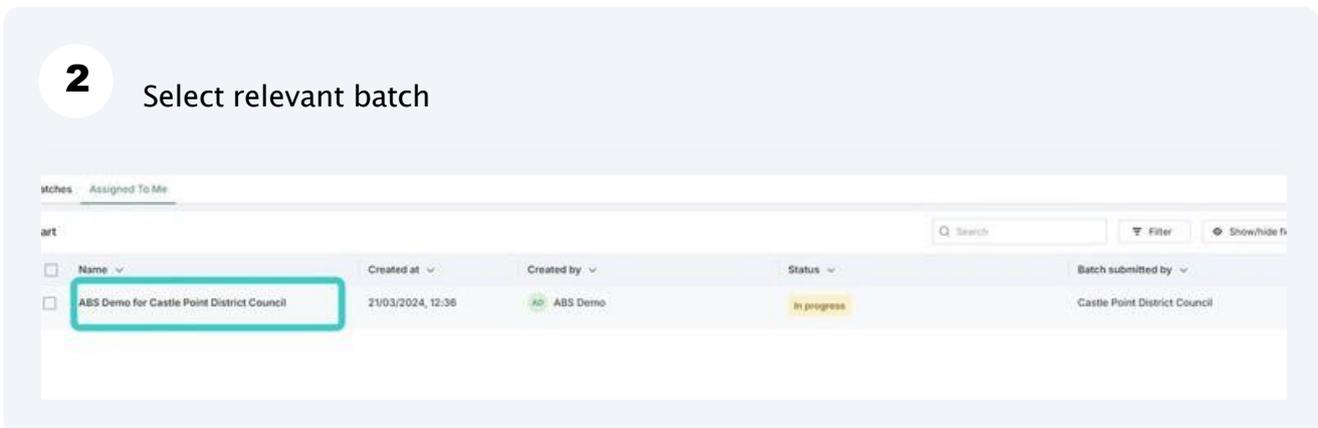


The screenshot shows a dashboard with five summary cards: 'Created this month' (0), 'Awaiting DR Approval' (0), 'Awaiting DP Approval' (3), 'Total Approved' (0), and 'Total Batches' (3). Below the cards is a navigation bar with the 'Assigned To Me' tab highlighted in a red box. A table below shows one batch: 'ABS Demo for Castle Point District Council' with status 'In progress'.

Name	Created at	Created by	Status	Batch submitted by
ABS Demo for Castle Point District Council	21/03/2024, 12:38	ABS Demo	In progress	Castle Point District Council

2

Select relevant batch



The screenshot shows the same dashboard as above, but the 'ABS Demo for Castle Point District Council' batch in the table is highlighted with a red box.

Name	Created at	Created by	Status	Batch submitted by
ABS Demo for Castle Point District Council	21/03/2024, 12:38	ABS Demo	In progress	Castle Point District Council

3

To show comments:

1. Select details icon
2. Click "Show more"
3. This will highlight any comments made by the DP regarding your batch
4. Close details pop-up

LA Homepage

### ABS Demo for Castle Point District Council

Batch Assessor sent this item back to you with the following notes:  
Please provide a justification, including size of the property (meterage & number of bedrooms), why this measure is required for the property etc. It is also advised that were possible, A&A costs should be split out of the measure cost.

**Project**  
Let's start by telling us which financial year you need funding for

Financial year \*  
2024/5

Project ID  
[Search]

Project \*  
project\_id: T\_0001, Homes funded: 1500  
Project name: Test Project

Total homes (all years): 2,500 | Total homes (this FY): 1,500 | Homes funded to date: [Progress Bar]

Save Submit

Details

this measure is required for the property etc.

**Status**  
In progress 0%  
Current step: Start  
Assigned to: ABS Demo

Show more

Save Submit



DP Approval

Batch Assessor  
21/03/2024, 13:54

Sent back

Batch Assessor sent this item back to Start with the following notes:  
Please provide a justification, including size of the property (meterage & number of bedrooms), why this measure is required for the property etc. It is also advised that were possible, A&A costs should be split out of the measure cost.

Start

ABS Demo

In progress

Grant Recipient Approval

Completed

Completed

DP Approval

Batch Assessor  
21/03/2024, 13:54

Sent back

Batch Assessor sent this item back to Start with the following notes:  
Please provide a justification, including size of the property (meterage & number of bedrooms), why this measure is required for the property etc. It is also advised that were possible, A&A costs should be split out of the measure cost.

Start

ABS Demo

In progress

Show more

4 To submit an answer to the comments:

1. Select comments icon
2. Insert relevant comments on points raised
3. Click send
4. Click "Submit"

Batch Assessor sent this item back to you with the following notes:

Please provide a justification, including size of the property (meterage & number of bedrooms), why this measure is required for the property etc. It is also advised that where possible, A&A costs should be split out of the measure cost.

Project

Let's start by telling us which financial year you need funding for

Financial year \*  
2024/5

Project ID

Project \*

project_id	Homes funded
T_0001	1500

Project name  
Test Project

Total homes (all years)	Total homes (this FY)	Homes funded to date
2,500	1,500	

Details

Status

In progress 0%

Current step:

Start

Assigned to

ABS Demo

Show more

Save

Submit

Batch Assessor sent this item back to you with the following notes:

Please provide a justification, including size of the property (meterage & number of bedrooms), why this measure is required for the property etc. It is also advised that where possible, A&A costs should be split out of the measure cost.

Project

Let's start by telling us which financial year you need funding for

Financial year \*  
2024/5

Project ID

Project \*

project_id	Homes funded
T_0001	1500

Project name  
Test Project

Total homes (all years)	Total homes (this FY)	Homes funded to date
2,500	1,500	

Comments

ABS Demo - 21/03/2024, 13:57  
Initiator  
lorem ipsum

Write a comment

Save

Submit

Batch Assessor sent this item back to you with the following notes:

Please provide a justification, including size of the property (meterage & number of bedrooms), why this measure is required for the property etc. It is also advised that where possible, A&A costs should be split out of the measure cost.

Project

Let's start by telling us which financial year you need funding for

Financial year \*  
2024/5

Project ID

Project \*

project_id	Homes funded
T_0001	1500

Project name  
Test Project

Total homes (all years)	Total homes (this FY)	Homes funded to date
2,500	1,500	

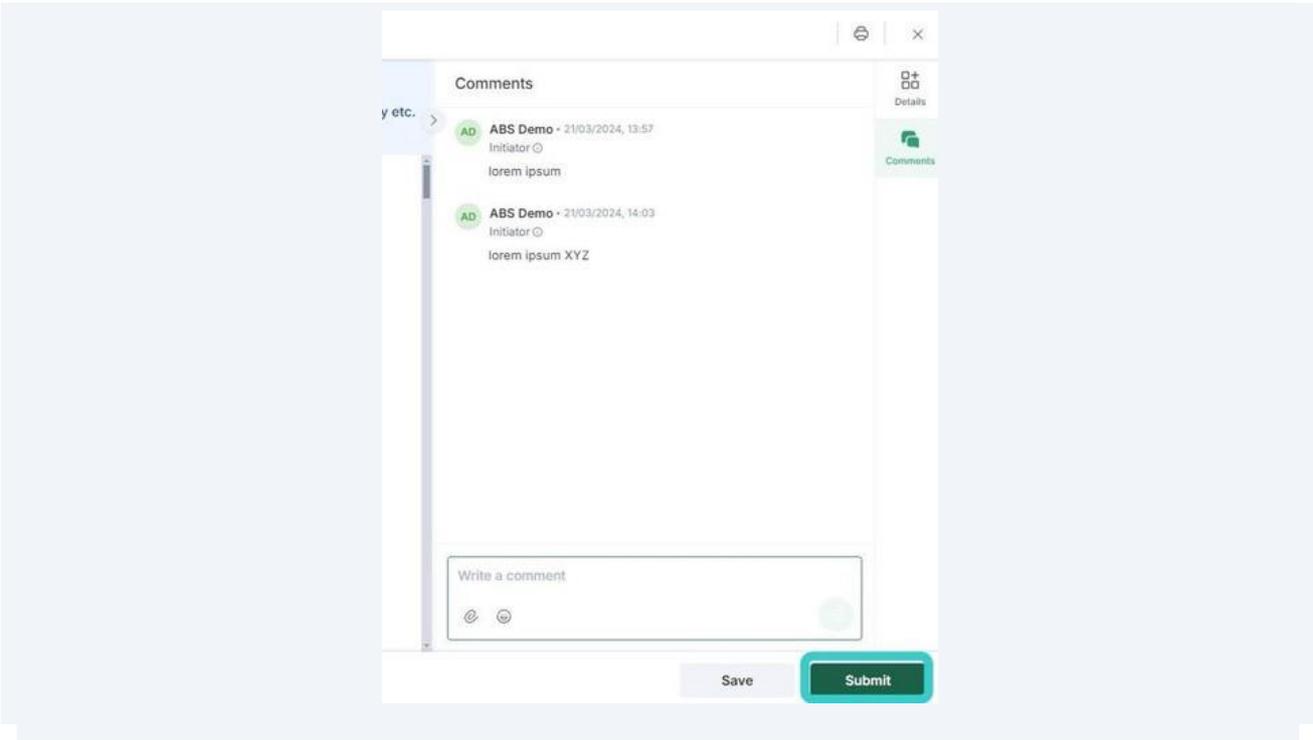
Comments

ABS Demo - 21/03/2024, 13:57  
Initiator  
lorem ipsum

lorem ipsum XYZ

Save

Submit



Alert!

Please make sure you click send on your comments before submitting

5

Your batch is now resubmitted and will be visible under your "In progress" tab

Created at	Batch submitted by	Project ID
21/03/2024, 12:20	Castle Point District Council	T_0001
21/03/2024, 12:07		

# How to view FY1 batch comments

1

Click "FY1 Batch Comments"

The screenshot shows the Salix LA Homepage. At the top, there is a navigation bar with 'My Applications', 'Project Applications', and 'FY1 Batch Comments' (highlighted with a red box). Below the navigation bar is a dark blue header with the Salix logo on the left and 'LA Homepage' on the right. Underneath the header is a 'Project ID' dropdown menu set to 'T\_0001'. The main content area features a '+ New Application' button on the right and five summary cards: 'Created this month' (0), 'Awaiting QR Approval' (0), 'Awaiting DP Approval' (0), 'Total Approved' (0), and 'Total Batches' (0).

2

You can now view all FY1 batch comments

The screenshot shows the 'Batch Applications by Project' page. At the top, there is a navigation bar with 'My Applications', 'Project Applications', and 'FY1 Batch Comments'. Below the navigation bar is a dark blue header with the Salix logo on the left and 'Batch Applications by Project' on the right. Underneath the header is a 'Project ID' dropdown menu set to 'Select a Project ID'. The main content area is titled 'Comments - LA View' and features a search bar and a table of comments. The table has columns for 'Project ID', 'Batch ID', 'Comment Content', 'Created At', 'Modified At', and 'Created I'. The first row shows 'T\_0001', 'Pk8GImcniWVK', 'Comment test', '13/02/2024, 11:56', '13/02/2024, 11:56', and a truncated 'Created I' value. Below the table, there are pagination controls for 'per page' (set to 10) and 'Showing 1 to 1 out of 1 entries'.

Project ID	Batch ID	Comment Content	Created At	Modified At	Created I
T_0001	Pk8GImcniWVK	Comment test	13/02/2024, 11:56	13/02/2024, 11:56	

3

To filter your view please click 'Filter'

AD

### Match Applications by Project

Select a Project ID ▾

Q Search **Filter** Export

Comment Content ▾	Created At ▾	Modified At ▾	Created By Name
Comment test	13/02/2024, 11:56	13/02/2024, 11:56	
COUNT 10 ▾	MIN 2024-01-31T10:51:00Z ▾	MIN 2024-01-31T10:51:00Z ▾	COUNT 10 ▾

4

Click "Add a filter"

ID: Select a Project ID ▾

Q Search **Filter**

#### Advanced filter

Add filters and conditions to create an advanced

**+ Add a filter**

5

Select desired filter conditions, click 'Apply'

The screenshot shows the Salix application interface. At the top, there is a navigation bar with 'Home', 'My Applications', 'Project Applications', and 'FY1 Batch Comments'. Below this is a header for 'Batch Applications by Project' with a 'Project ID' dropdown menu. The main content area is titled 'Batch Comments - LA View' and contains a table with columns for '#', 'Project ID', 'Batch ID', and 'Comment Content'. The first row shows a project ID of 'T\_0001' and a batch ID of 'PkBQlnch/WVX'. To the right of the table is an 'Advanced filter' dialog box. This dialog has a search bar and a list of filterable fields: Project ID, Batch ID, Comment Content, Created At, Modified At, Created By Name, and Created By User. A red box highlights the search bar and the first filter condition. An 'Apply' button is visible at the bottom right of the dialog.

6

for additional conditions for your filtered view, click "Add new condition"

This screenshot shows the same Salix application interface as the previous one, but with the 'Advanced filter' dialog box expanded. The dialog now shows a filter condition for 'Created By ...'. A red box highlights the '+ Add new condition' button, which is used to add more filter criteria. The 'Apply' button is still visible at the bottom right of the dialog.

# Check batch application status

1

Navigate to "Project Applications"

The screenshot displays the Salix LA Homepage. At the top, there are navigation tabs for "My Applications" and "Project Applications". Below the header, there are five summary cards: "Created this month" (0), "Awaiting OR Approval" (1), "Awaiting DP Approval" (0), "Total Approved" (0), and "Total Batches" (3). A "+ New Application" button is located in the top right. Below the summary cards, there is a section titled "Assigned To Me" with a status filter bar showing "Draft" (1), "In progress" (1), "Participated", "Completed", "Withdrawn", and "Rejected". A search bar and "Filter" button are also present. The main content is a table with the following data:

Name	Created at	Batch submitted by	Project ID	2A. The lead LA affirms th...	Batch II
ABS Demo for Castle Point District Council	21/03/2024, 12:20	Castle Point District Council	T_0001	Yes	Not yet
ABS Demo for	21/03/2024, 12:07			No	Not yet

2

Click this dropdown and select relevant filter for desired view

### Batch Applications by Project

Project ID:  Step:

Version Number	Created by	Submitted by GR at	Current step
1	AD ABS Demo	2024-03-21T13:02:46Z	Escalated
2	AD ABS Demo	2024-03-21T13:02:39Z	Grant Recipient Approval
2	AD ABS Demo	2024-03-21T11:09:28Z	DP Approval
1	JN		Approved
1	JN		Completed Applications
1	JN		Grant Recipient Approval
1	JN		Grant Recipient Approval
1	TT Tester Tester		Grant Recipient Approval

Select a Step

- All
- Start
- Grant Recipient Approval
- DP Approval
- Escalated
- Approved
- Completed Applications

# How to view and filter all your batch applications

1 Navigate to "My Applications" tab

The screenshot shows the Salix web interface. At the top, there is a navigation bar with three tabs: 'Home', 'My Applications' (which is highlighted with a red box), and 'Project Applications'. Below the navigation bar is a dark blue header with the Salix logo on the left and the text 'My Batch Applications' on the right. Underneath the header is a 'Filters' section containing two dropdown menus: 'Project ID' with the text 'Select a Project ID' and 'Step' with the text 'All'. Below the filters is a table with the following data:

#	Batch ID	Batch Version Number	Project ID	Current step
1	Pk8vmCSI2JUh	1	T_0001	Escalation
2	Pk8vmFIJQA76	2	T_0001	Grant Recipient Approval
3	Pk8vTs00d8q9	2	T_0001	Start
COUNT 3		SUM 5	COUNT 3	COUNT 3

2

To filter your view click this dropdown.

The screenshot shows a web application interface with a table. At the top, there are two dropdown menus: 'Project ID: Select a Project ID' and 'Step: All'. The 'Step' dropdown is highlighted with a red box. Below the filters, there is a table with columns: 'Batch Version Number', 'Project ID', and 'Current step'. The table contains three rows of data, all with 'T\_0001' in the 'Project ID' column. A dropdown menu is open for the 'Current step' column, showing options: 'Select a Step', 'All', 'Start', 'Grant Recipient Approval', 'DP Approval', 'Escalated', 'Approved', and 'Completed Applications'. The 'All' option is highlighted in blue. At the bottom of the table, there are summary statistics: 'SUM 5' and 'COUNT 3'.

3

Select desired view

The screenshot shows a web application interface titled 'My Batch Applications'. At the top, there are two dropdown menus: 'Project ID: Select a Project ID' and 'Step: Escalated'. Below the filters, there is a table with columns: 'Batch Version Number', 'Project ID', 'Current step', and 'The amount'. The table contains one row of data with '1' in the 'Batch Version Number' column and 'T\_0001' in the 'Project ID' column. A dropdown menu is open for the 'Current step' column, showing options: 'Select a Step', 'All', 'Start', 'Grant Recipient Approval', 'DP Approval', 'Escalated', 'Approved', and 'Completed Applications'. The 'Escalated' option is highlighted in blue. At the bottom of the table, there are summary statistics: 'SUM 5' and 'COUNT 3'. The total amount is 'SUM 18000'. The text 'Showing' is visible at the bottom right of the interface.

# Personalise your batch view

This guide provides step-by-step instructions on how to navigate to the "In progress" tab in a batch data system. It also offers tips on personalising the batch view by adding/removing fields, moving columns, changing column sizes, and selecting sorting preferences. This guide is useful for anyone looking to customise their batch data view to better suit their needs.

1

Navigate to "In progress" tab

Awaiting GR Approval

Awaiting DP Approval

0

Total Approved

0

Draft 2

In progress 1

Participated

Completed

Withdrawn

Rejected

Search

Created at

Batch submitted by

Project ID

20/03/2024, 14:56

Castle Point District Council

T\_0001



Tip! You can personalise your batch view to suit your needs by:

- Adding and removing fields
- Moving columns
- Change column sizes
- Select how you want to sort your batch data

2

To add or remove fields:

1. Click "Show/hide fields"
2. Search or select desired fields
3. Click "Apply"

Home My Applications Project Applications LA Homepage

+ New Application

Created this month: 0

Awaiting GP Approval: 0

Awaiting GP Approval: 0

Total Approved: 0

Total Batches: 0

My Batches Assigned To Me

Draft 2 In progress 1 Participated Completed Withdrawn Rejected

In progress

Search Filter Show/hide fields

#	Name	Created at	Current step	Status	Batch submitted by
1	ABS Demo for Adur District Council	20/03/2024, 16:24	Grant Recipient Approval	In progress	Adur District Council

Home My Applications Project Applications LA Homepage

Search

You can select up to 100 fields.

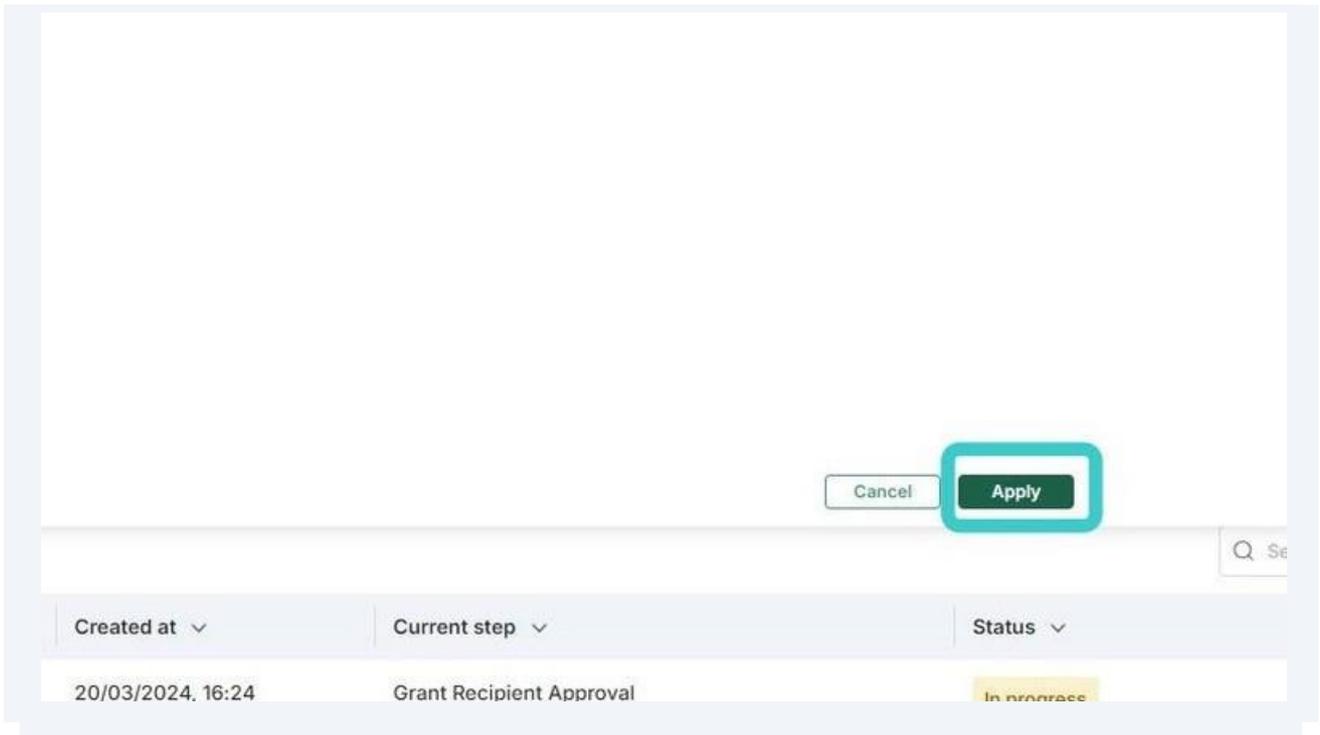
- funding\_table\_concat
- Batch additional measures
- Batch ID
- Additional measure supporting evidence
- Deadline breached?
- Tables last modified at

Cancel Apply

In progress

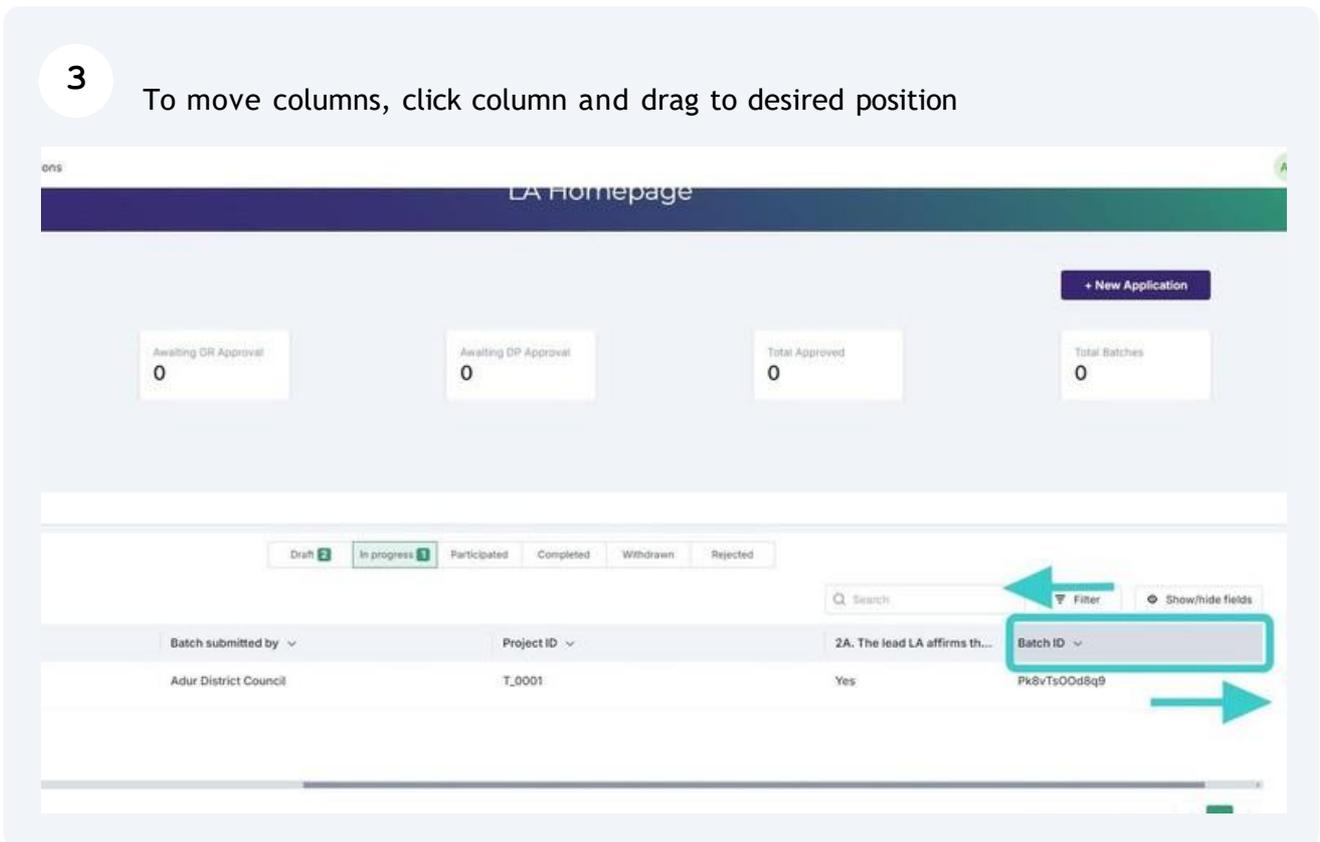
Search Filter Show/hide fields

#	Name	Created at	Current step	Status	Batch submitted by
1	ABS Demo for Adur District Council	20/03/2024, 16:24	Grant Recipient Approval	In progress	Adur District Council

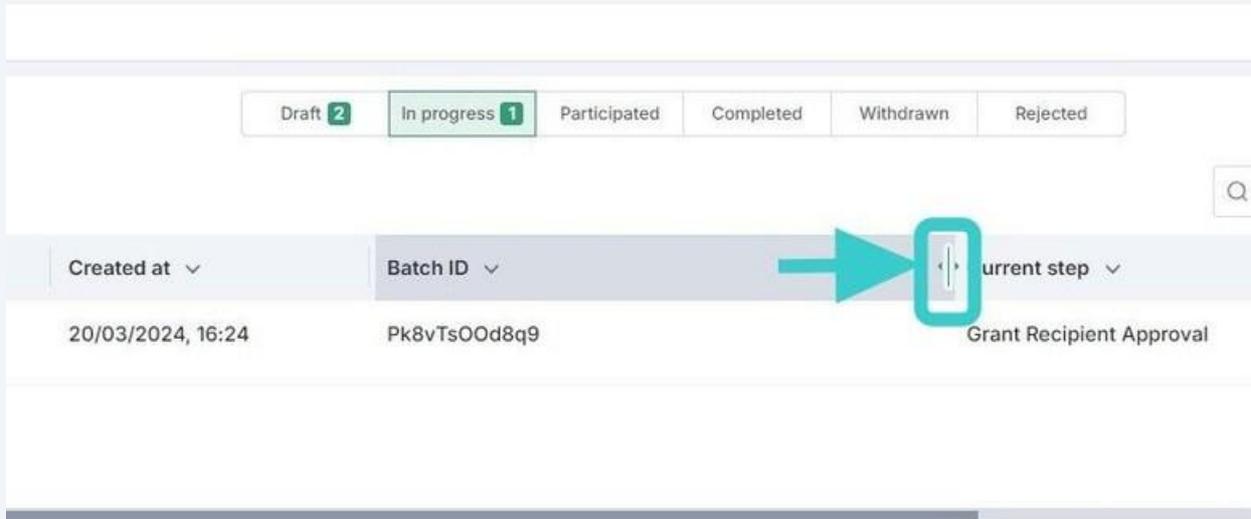


3

To move columns, click column and drag to desired position



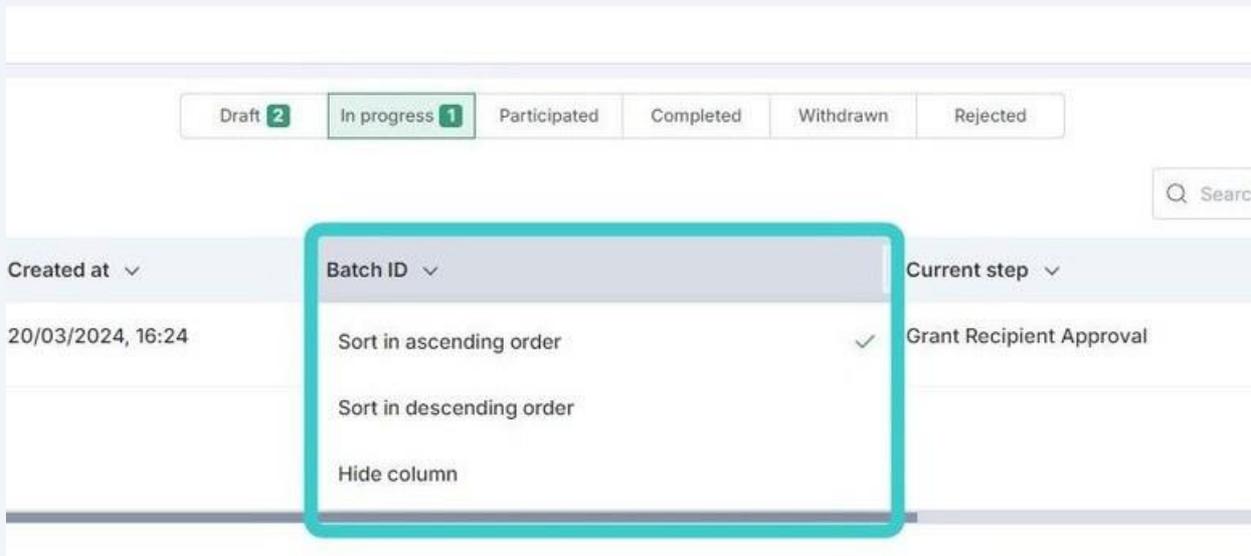
- 4 To change the width of a column, drag the boundary on the right side of the column until it is the width that you want.



The screenshot shows a table with a header row and one data row. The header row has three columns: 'Created at', 'Batch ID', and 'Current step'. The data row contains the values '20/03/2024, 16:24', 'Pk8vTsOOd8q9', and 'Grant Recipient Approval'. Above the table is a filter bar with buttons for 'Draft 2', 'In progress 1', 'Participated', 'Completed', 'Withdrawn', and 'Rejected'. A search icon is on the right. A teal arrow points to a vertical double-headed arrow handle on the right side of the 'Batch ID' column header, which is highlighted with a teal box.

Created at	Batch ID	Current step
20/03/2024, 16:24	Pk8vTsOOd8q9	Grant Recipient Approval

- 5 Click the column title to select how you want to sort



The screenshot shows the same table as in step 4. The 'Batch ID' column header is highlighted with a teal box, and a dropdown menu is open below it. The menu options are 'Sort in ascending order' (with a checkmark), 'Sort in descending order', and 'Hide column'. The filter bar and search icon are also visible.

Created at	Batch ID	Current step
20/03/2024, 16:24	Pk8vTsOOd8q9	Grant Recipient Approval

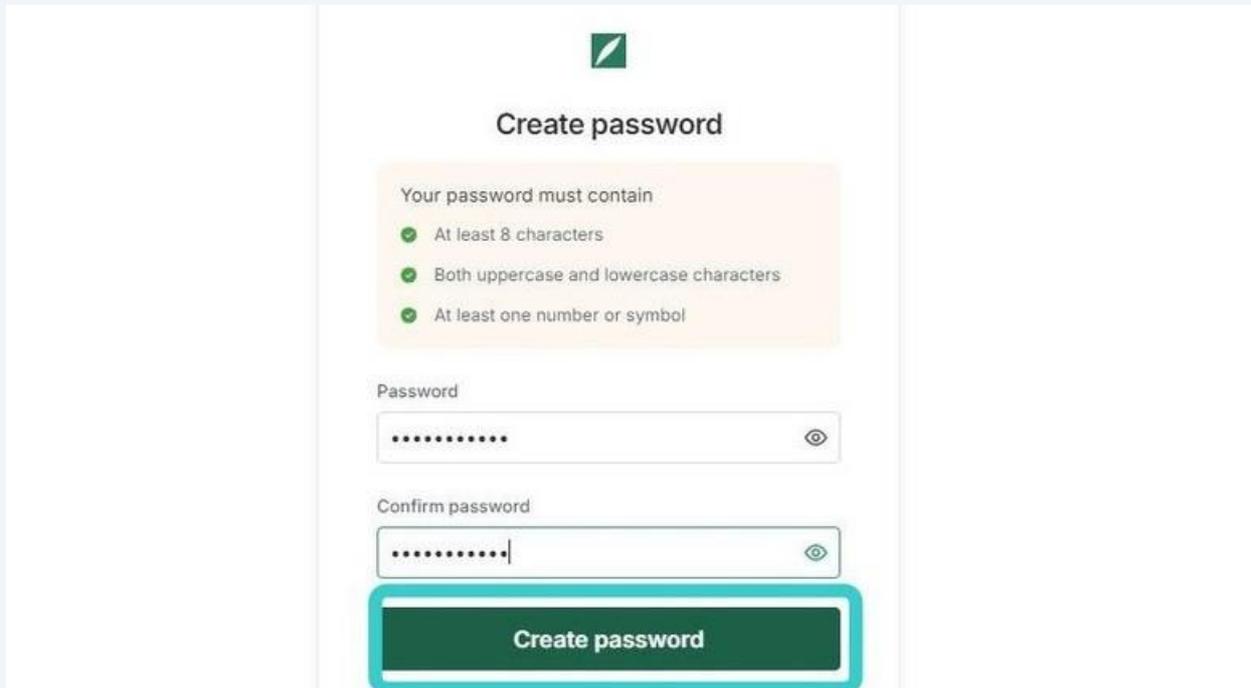
# Sign up to ABS

This guide provides step-by-step instructions on how to sign up for ABS portal. It includes information on creating a password and logging in.

- 1** Navigate to ABS [portal via the email invite where](https://abs-salix.kissflow.com/) you will be requested to set up your password <https://abs-salix.kissflow.com/>

- 2** Click "Create password".

You will only have to do this when logging into the system the first time.



The screenshot shows a web form titled "Create password" with a green checkmark icon above the title. Below the title is a list of requirements for the password, each with a green checkmark icon: "At least 8 characters", "Both uppercase and lowercase characters", and "At least one number or symbol". Below the requirements are two input fields: "Password" and "Confirm password", both containing masked characters (dots) and a toggle icon. At the bottom of the form is a large green button with the text "Create password".

3

Log in to ABS portal with your new password

Sign in to the portal using

Google

Microsoft

Or sign in using

Email address

Password

Forgot password?

Sign in