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DMS
SHDF Wave 2

April 2025
Version 1.2

Contents

Responsibilities of the grant recipient

What?

As a Grant Recipient (GR), you are required to submit a monthly report that adheres to the requirements set out in the Grant Funding Agreement (GFA).

This report ensures that project progress, data accuracy, and funding alignment are tracked efficiently.

Why?

The data you submit allows the department to:

- Ensures compliance with funding requirements.
- Tracks project progress effectively.
- Facilitates grant payment drawdowns in a timely manner.
- Supports overall program success and transparency.

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Responsibilities of the grant recipient

When?

Reports must be submitted by the **10th working day of each month**.

Failure to complete, submit, or provide accurate and timely information may negatively impact your project funding and performance reporting.

How?

1. Access the revised data template and data dictionary. This can be downloaded once you have logged in to the DMS portal in the the downloads page

    - Portal link: https://dms-uat.beis.gov.uk/

2. Complete the template accurately with data for the specified reporting period.

3. Validate the data using the DMS portal's validation feature.

4. Submit the data on or before the deadline via the portal.

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Support and assistance

Q. How can I get assistance if I have trouble submitting my data?

A.   If you need help with your data submission, contact your Single Point of Contact (SPOC). They will guide you through the submission process or direct you through the prescribed escalation route if additional support is needed.

Q. Where can I find the revised data collection template?

A.   Please reach out to your SPOC if you have queries on accessing the data upload templates.

Q. What should I do if the portal displays an error message?

A.   Refer to the Error Message Key section below to resolve common issues. For unresolved errors, contact your SPOC for further guidance

Q. What if I need to escalate an issue?

A.   If your SPOC cannot resolve the issue, they will help escalate it to the appropriate support team.

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Support and assistance

Q. How can I ensure smooth submission in case of absence?

A. Ensure that at least two people in your organisation have access to the portal and the data upload file. This ensures reports can still be submitted on time during annual leave or unexpected absences.

Q. Where can I find the portal opening dates?

A. Portal opening dates can be found on the first tab of the template and are communicated in advance. Refer to the template or contact your SPOC for specific timelines.

Always plan your submissions within the given window to avoid delays.

Q. Where can I find more detailed instructions?

A. For further guidance, refer to the "Resources" section on the portal or contact your SPOC.

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Support and assistance

Q. What are the roles and responsibilities of the Delivery Agent, Partner and the Department in the DMS process?

A.

Delivery Partner:

- Acts as the main contact for Grant Recipients (GRs) through the SPOC network.

- Discusses monthly uploads during regular meetings.

- Escalates any issues raised by GRs about the DMS platform to the Delivery Agent.

Delivery Agent:

- Helps GRs by sending reminders and prompts to submit reports by the 10th working day of the month.

- Provides support through the SPOC network and central communications.

- Acts as the first point of escalation for any issues raised by GRs regarding the DMS platform.

Department:

- Tracks monthly progress on report submissions.

- Re-opens reporting windows if there are errors or late submissions.

- Works with the Delivery Partner and Agent to send reminders and updates to GRs about reporting deadlines.

- Sends communications when changes or updates are made to the DMS platform.

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Template field requirements

Q. What do the colour coded columns in the template mean?

A. The columns in the template are color-coded to indicate their level of importance.

Dark green cells: These fields are mandatory and must be completed for the spreadsheet to pass validation. Failure to complete these will result in a failed submission.

Light green cells: These are expected to be completed. Depending on how you fill out the spreadsheet, they may also become mandatory. Completing these fields now will save time later and ensure compliance.

Yellow cells: These fields should be completed as soon as the information becomes available. All information in these fields will eventually be required, so updating them regularly is essential.

It is critical to complete as much information as possible for every submission to ensure data accuracy and streamline the reporting process.

Take the time to ensure your data is thorough and up to date.

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Guidance for Actual and forecast KPIs

Project Actual/Forecast Progress - Data should be updated each month													
Field	**Description**	Mar-2023	Apr-2023	May-2023	Jun-2023	Jul-2023	Aug-2023	Sep-2023	Oct-2023	Nov-2023	Dec-2023	Jan-2024	Feb-20:
Note: These values should be updated monthly. This information will be compared to the Baseline KPIs tab to assess project performance							Enter a value for every month, even if the value is 0. These month fields are CUMULATIV						Past and current month
MS1 – Project Team Established	Enter the cumulative actual/forecast monthly progress towards MS1 – Project Team Established as a percentage.												
MS2 – Procurement Activity Completed	Enter the cumulative actual/forecast monthly progress towards MS2 – Procurement Activity Completed as a percentage.												
KPI4 – Number of tenants engaged and signed up to works (Milestone 3)	Enter the cumulative actual/forecast number of households each month where pre-construction tenant engagement is complete (i.e., the households who have both been engaged and have signed up to works)												
KPI1 – Number of properties that have completed the PAS2035 Risk Assessment stage (Milestone 4)	Enter the cumulative actual/forecast number of homes each month which have completed a PAS2035 Risk Assessment												
KPI2 – Number of properties that have completed the PAS2035 Dwelling Assessment stage (Milestone 5)	Enter the cumulative actual/forecast number of homes each month which have completed the dwelling assessment stage												
KPI3 – Number of properties that have completed the Design & Coordination stage (Milestone 6)	Enter the cumulative actual/forecast number of homes each month which have completed the design & coordination stage												
MS7 – Installation Stage Started	Enter the cumulative actual/forecast number of homes each month where installation has started												
MS8 – Installation Stage Completed	Enter the cumulative actual/forecast number of homes each month where installation has completed												
KPI5 – Number of properties completed	Enter the cumulative actual/forecast number of												

Definitions | Project Summary | Baseline KPI | **Actual & Forecast KPIs** | Risk Register | Fraud Register | Property Details | Measure Details | Tenant Details | Installer Details

To ensure accurate reporting, follow these guidelines:

- Enter a value for every month, even if it is 0. Leaving a month blank can cause errors in reporting.

- Use actual data for past and current months.

- Forecasted values for future months can be adjusted but must stay within the agreed project scope.

- Cumulative fields should always increase. Each new month's entry should include all previous data.

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Actual and forecast KPIs tab

Q: How should I enter monthly data in the template?

A. You need to enter a value for every month, even if the value is 0. The fields are cumulative, which means each month's value should include all data from the previous months

Q: What happens if my values decrease between months?

A. A blue cell is a warning that the value has decreased compared to the previous month. This usually happens if cumulative values aren't being entered correctly. Double-check your data and make sure each month includes all previous months.

Q: How do I handle past, current, and future months?

A. For past and current months, use actual values based on the data you have.

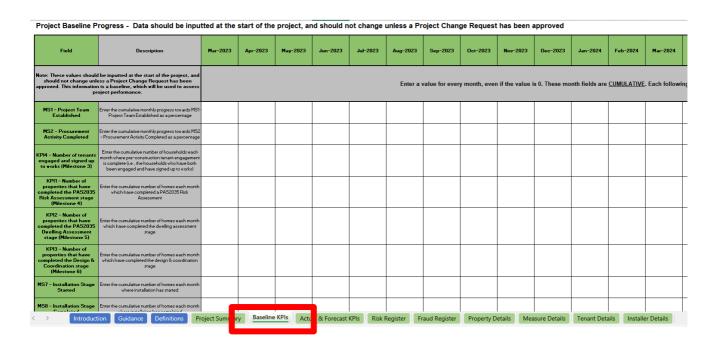For future months, enter forecasted values to reflect your project's expected progress.

Q: Does the total value matter?

A. Yes, the total value across all months should match the total included in your baseline tab.

Make sure your data is consistent to avoid errors.

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Baseline KPIs tab

Project Baseline Progress - Data should be inputted at the start of the project, and should not change unless a Project Change Request has been approved

Field	Description	Mar-2023	Apr-2023	May-2023	Jun-2023	Jul-2023	Aug-2023	Sep-2023	Oct-2023	Nov-2023	Dec-2023	Jan-2024	Feb-2024	Mar-2024
Note: These values should be inputted at the start of the project, and should not change unless a Project Change Request has been approved. This information is a baseline, which will be used to assess project performance.							Enter a value for every month, even if the value is 0. These month fields are <u>CUMULATIVE</u>. Each following							
MS1 – Project Team Established	Enter the cumulative monthly progress towards MS1-Project Team Established as a percentage													
MS2 – Procurement Activity Completed	Enter the cumulative monthly progress towards MS2 – Procurement Activity Completed as a percentage													
KPI4 – Number of tenants engaged and signed up to works (Milestone 3)	Enter the cumulative number of households each month where pre-construction tenant engagement is complete (i.e., the households who have both been engaged and have signed up to works)													
KPI1 – Number of properties that have completed the PAS2035 Risk Assessment stage (Milestone 4)	Enter the cumulative number of homes each month which have completed a PAS2035 Risk Assessment													
KPI2 – Number of properties that have completed the PAS2035 Dwelling Assessment stage (Milestone 5)	Enter the cumulative number of homes each month which have completed the dwelling assessment stage													
KPI3 – Number of properties that have completed the Design & Coordination stage (Milestone 6)	Enter the cumulative number of homes each month which have completed the design & coordination stage													
MS7 – Installation Stage Started	Enter the cumulative number of homes each month where installation has started													
MS8 – Installation Stage Completed	Enter the cumulative number of homes each month where installation has completed													

| < | > | Introduction | Guidance | Definitions | Project Summary | **Baseline KPIs** | Actual & Forecast KPIs | Risk Register | Fraud Register | Property Details | Measure Details | Tenant Details | Installer Details |

Q. How should I enter monthly data in the template?

A. Enter a value for every month, even if the value is 0. The fields are cumulative, meaning that each month's entry should include all previous data up to that point.

This ensures accurate tracking and reporting of progress.

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Baseline KPIs tab

Q. When should I change my baseline?

A. Baselines should be inputted at the start of the project and should *not* be changed unless a Project Change Request has been approved.

This baseline information is critical as it will be used to assess project performance throughout the project lifecycle.

Q. Why has my cell turned blue in the template?

A. A blue cell is a warning indicating that the value in the field has decreased compared to the previous month.

Review the data to ensure it is correct and reflects cumulative reporting requirements.

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Risk register tab

Q: I have a new risk. What should I do?

A.   The Risk ID must be unique for each risk and numbers should follow the format 'R001' for the first entry, then 'R002', 'R003', and so on for subsequent entries.

Each risk <u>must</u> have its own unique reference number in the format 'R001', and no other numbering convention will be accepted and will cause validation errors.

The numbering should not restart each month but continue sequentially across all months.

Do not use a different format, Do not reuse reference numbers in future months unless it refers to the same incident.

Q: What should I do if a risk is closed, or the score has reduced?

A.   Keep the risk in the register. If the risk has been resolved or its impact has reduced, change the risk score to "low" to reflect the current impact.

This ensures a clear history of risks and how they were managed.

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Risk register tab

Q: What is the minimum number of risks I need to submit?

A: While there is no strict minimum number of risks required, you should provide as many risks as are relevant to your project. At a minimum, ensure that key risks identified during the project application are included in the initial submission.
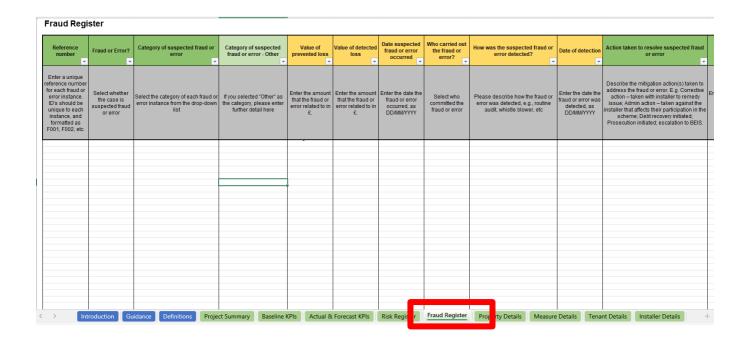
Update the register regularly with:

A. New risks that arise during the project.

B. Revised descriptions or scores for existing risks.

C. Closed risks with reasons for closure.

Providing a comprehensive and up-to-date risk register helps to track project challenges effectively and ensures compliance with reporting requirements. Incomplete submissions may impact project performance evaluations.

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Fraud register tab

Q. Are there specific format requirements for fields in the fraud register tab?

Yes. All fields must be completed in the correct format as indicated in the guidance.

For example:

• Use alphabetical or numerical values as required.

• Follow specified formats for dates (DD/MM/YYYY), reference numbers (F001), and other inputs.

Failure to follow the correct format may result in validation errors or delays in processing your submission.

Fraud register tab

Q: What is the format for reference numbers, and how should I use them?

A.   Reference numbers should follow the format 'F001' for the first entry, then 'F002', 'F003', and so on for subsequent entries. Do not reuse reference numbers in future months unless it refers to the same incident.

Each incident <u>must</u> have its own unique reference number in the format 'F001', and no other numbering convention will be accepted.

The numbering should not restart each month but continue sequentially across all months.

Q: What if I have an ongoing fraud or error instance that spans multiple months?

A.   Use the unique reference number for the incident and include it in subsequent months until it is fully resolved.

If you have new information, such as the value of the loss, update the entry using the same reference number.

Q: Do I need to include instances every month?

Only include instances if they occur, or if the updated information is the be included e.g. the value has been established.

If there are no new instances for a given month, leave the tab blank for that period.

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Guidance for property details

Property Details

This page covers the details of the properties where measures will be installed under SHDF. Please use one line per address. This page should be updated monthly

Grant Recipient Property Reference	First line of address	Town	Postcode	Unique Property Reference Number	Property Type	Property Wall Type	Tenure Type	Property Year Built	Smart Meter Installed?	On or off gas grid property	Pre-Heat
Enter a grant recipient property reference for each property. The property reference must be **unique** for every property, and can contain **up to 36** characters	Enter the property's first line of address	Enter the property's postal town	Enter the property's postcode	Enter the property's Unique Property Reference Number. This should be the UPRN, up to 12 digits long, provided by Ordinance Survey, available from lookups such as https://www.findmyaddress.co.uk/search. Each property's UPRN must be unique	Select the property type	Select whether the property has cavity or solid walls. You should specify if the home has cavity walls but is being treated with the solid wall cost cap (where this has been permitted because, e.g., the cavities are so thin that they cannot be filled)	Select the property tenure type	Enter the year the property was built	Select whether the property has a smart meter installed, and whether this was installed through SHDF	Select whether the property is on or off the gas grid. The home is off gas grid if it does not use mains gas for heating purposes	Select heating prem ins

Introduction | Guidance | Definitions | Project Summary | Baseline KPIs | Actual & Forecast KPIs | Risk Register | Fraud Register | **Property Details** | Measure Details | Tenant Details | Installer Details | +

Field: Grant Recipient Property Reference

To ensure the property record is included in the published statistics, please complete the '**Grant Recipient Property Reference**' column.
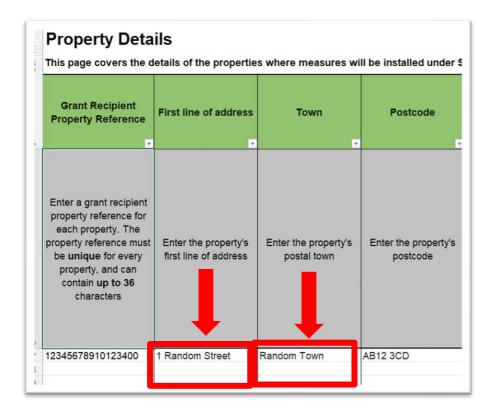
Each Grant Recipient Property Reference must be unique, as duplicate entries are removed.

Avoid creating different references for the same property, this helps prevent confusion. Always use the same reference for a property across all sheets.

This field is also essential for linking to the measure details.

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Guidance for property details

Property Details

This page covers the details of the properties where measures will be installed under S

Grant Recipient Property Reference	First line of address	Town	Postcode
Enter a grant recipient property reference for each property. The property reference must be **unique** for every property, and can contain **up to 36** characters	Enter the property's first line of address	Enter the property's postal town	Enter the property's postcode
123456789101123400	1 Random Street	Random Town	AB12 3CD

Property records cannot be included in the published statistics if any of these fields are left blank.

Field: First Line of Address

Enter the first line of the property address exactly as it appears on official records.
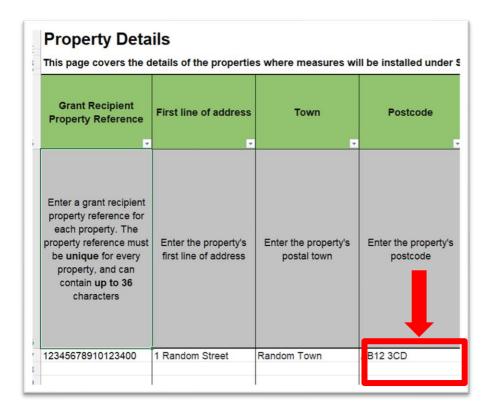
Stay consistent with any previous submissions to avoid discrepancies.

Field: Town

Enter the correct postal town. Double-check spelling to ensure accuracy.

If unsure, refer to official sources like Royal Mail or FindMyAddress.

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Guidance for property details

Property Details

This page covers the details of the properties where measures will be installed under S...

Grant Recipient Property Reference	First line of address	Town	Postcode
Enter a grant recipient property reference for each property. The property reference must be **unique** for every property, and can contain **up to 36** characters	Enter the property's first line of address	Enter the property's postal town	Enter the property's postcode
12345678910123400	1 Random Street	Random Town	B12 3CD

> Property records cannot be included in the published statistics if any of these fields are left blank.

Postcode

Make sure the postcode matches official records.

Double-check for any missing or extra characters. Mistakes here can cause issues later

Use FindMyAddress to verify if needed.

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Guidance for property details

Property Details

This page covers the details of the properties where measures will be installed under SHDF. Please use one

Grant Recipient Property Reference	First line of address	Town	Postcode	Unique Property Reference Number
Enter a grant recipient property reference for each property. The property reference must be **unique** for every property, and can contain **up to 36** characters	Enter the property's first line of address	Enter the property's postal town	Enter the property's postcode	Enter the property's Unique Property Reference Number. This should be the UPRN, up to 12 digits long, provided by Ordinance Survey, available from lookups such as https://www.findmyaddress.co.uk/search. Each property's UPRN must be unique
12345678910123400	1 Random Street	Random Town	AB12 3CD	12345678910

Unique Property Reference Number (UPRN)

Please enter the **UPRN** that corresponds to the property listed in the previous columns, ensuring it is unique for each property.

You can look up or verify the UPRN using this website: Find My Address.
If you have the UPRN, please include it.

We highly recommend including this for data validation and audit compliance

Make sure it's accurate—it's a useful way to avoid duplicate or incorrect records.

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Property details tab

Q. How should I input property addresses in the "Application Property Details" section?

A. Ensure that property addresses are entered correctly in proper English, with accurate formatting.

Double-check the Postcode (column "E") and Unique Property Reference Number (UPRN) (column "F") as these fields are mandatory for tracking purposes.

Q. What is the correct format for postcodes?

A. Make sure there are no hidden spaces or extra spaces before or after the postcode.

The space in the middle of the postcode is fine (e.g., AB12 3CD), but any additional spaces will cause the portal to read them as extra digits and reject them.

Q. Is there a tool to verify postcodes and UPRNs?

A. Yes, you can use the free Postcode Search Tool at www.findmyaddress.co.uk to search for the official address, UPRN, and location of properties in England.

You can perform up to 10 searches daily per device; use multiple devices to search for more than 10 properties in a day.

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Guidance for property details

Property Details

This page covers the details of the properties where measures will be installed under SHDF. Please use one line per address. This pag

Grant Recipient Property Reference	First line of address	Town	Postcode	Unique Property Reference Number	Property Type	
Enter a grant recipient property reference for each property. The property reference must be **unique** for every property, and can contain **up to 36** characters	Enter the property's first line of address	Enter the property's postal town	Enter the property's postcode	Enter the property's Unique Property Reference Number. This should be the UPRN, up to 12 digits long, provided by Ordinance Survey, available from lookups such as https://www.findmyaddress.co.uk/search. Each property's UPRN must be unique	Select the property type	S c spe but i c per are
12345678910123400	1 Random Street	Random Town	AB12 3CD	1234567 910		

Mid-terrace
End-terrace
Semi-detached
Detached
Bungalow
Low rise flat (1-2 Storey)
Medium rise flat (3-5 Storey)
High rise flat (6+ Storey)
Park Home
Other

Property type

To select the **property type**, click on the cell and then click the downward arrow that appears.
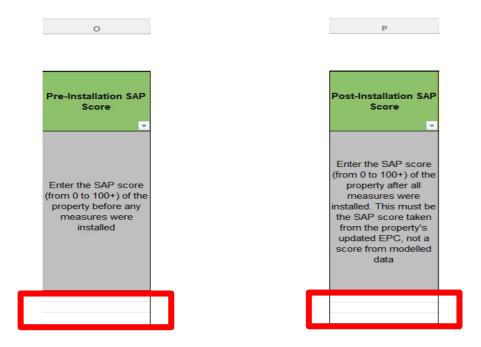
Choose the appropriate property type from the drop-down list.

This information is required to provide a breakdown of households upgraded in the published statistics.

Always select from dropdown menus to prevent validation issues. Copying and pasting data into cells with dropdown menus will override the dropdown functionality, causing errors during validation.

If dropdown options seem incorrect, check the Validation List tab in the template

Guidance for property details

O
Pre-Installation SAP Score
Enter the SAP score (from 0 to 100+) of the property before any measures were installed

P
Post-Installation SAP Score
Enter the SAP score (from 0 to 100+) of the property after all measures were installed. This must be the SAP score taken from the property's updated EPC, not a score from modelled data

SAP Score

Please ensure that both the pre-installation SAP score and post-installation SAP Score are entered.

The post-installation SAP score must be higher than the pre-installation score to maintain data accuracy.

This information is mandatory and necessary for including the EPC upgrade matrix in the published statistics.

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Guidance for measure details
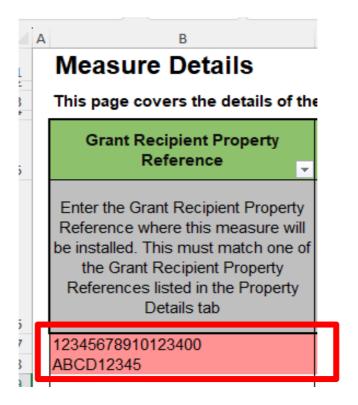
Measure Details

This page covers the details of the measures installed under SHDF. Please enter one row per measure. Each measure's UPRN must correspond to a UPRN in the Property Details tab. This page should be updated monthly

Grant Recipient Property Reference	Eligible Measure Type	Other Measure	Total Cost of Eligible Measure	Eligible Measure Cost of Material	Eligible Measure Installation Cost	Eligible Measure Repair Cost	Installer Nam
Enter the Grant Recipient Property Reference where this measure will be installed. This must match one of the Grant Recipient Property References listed in the Property Details tab	Select the type of eligible measure being installed in the property	If Other Measure Type is selected from the dropdown, please specify the measure type here	Enter the total cost for the specific eligible measure, including grant funding, co-funding, and household contributions	Enter the cost of the materials for the measure installed	Enter the installation cost for the measure	Enter any costs of repair or remediation in the course of installing the measure	Enter the name of the installer who

Definitions | Project Summary | Baseline KPIs | Actual & Forecast KPIs | Risk Register | Fraud Register | Property De... | **Measure Details** | Ten... Details | Installer Details | +

Q. When should I start reporting on measures?

A. Don't wait until the end of the scheme to report on measures. If properties are completed but measures haven't been recorded in the DMS, now is the time to add them.

Accurate reporting helps track progress and contributes to SHDF statistics published on gov.uk.
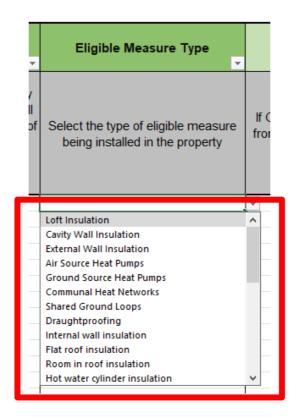
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Guidance for measure details

Grant Recipient Property Reference

Please ensure that a unique reference is entered for each property, matching the **Grant Recipient Property Reference** provided in the Property Details tab.

Use the **same reference across all sheets.**

This column is essential for linking to the property details, and the measure record cannot be included in the statistics if it is left blank.

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Guidance for measure details

Eligible Measure Type

Select the type of eligible measure being installed in the property from the available options.

Avoid manually entering a value or selecting an invalid option, as this may cause errors.
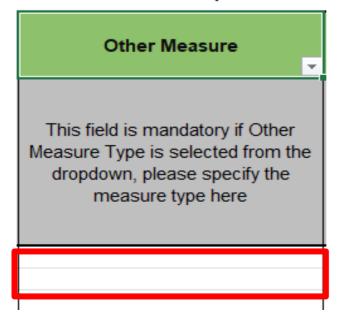
This field is required to include a breakdown of measures installed in the published statistics.

If left blank, the measure record cannot be included.

Guidance for measure details

D

Please enter one row per measure

Other Measure

This field is mandatory if Other Measure Type is selected from the dropdown, please specify the measure type here
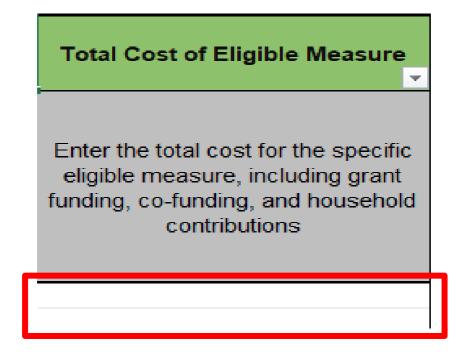
Other Measure Type

If **'Other Measure Type**' is selected from the dropdown in the **'Eligible Measure Type'** column, please specify the measure type in this field.

This is mandatory when 'Other' is chosen as the eligible measure type. If left blank, when "Other" is chosen will result in an error and cannot be included in the published statistics.

This information is necessary to provide a breakdown of measures installed in the statistics.

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Guidance for measure details
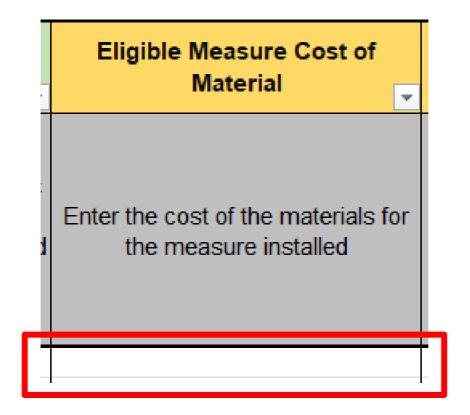
Total Cost of Eligible Measure

If **'Other Measure Type**' is selected from the dropdown in the **'Eligible Measure Type' c**olumn, please specify the measure type in this field.

This is mandatory when 'Other' is chosen as the eligible measure type. If left blank, when "Other" is chosen will result in an error and cannot be included in the published statistics.

This information is necessary to provide a breakdown of measures installed in the statistics.

Guidance for measure details
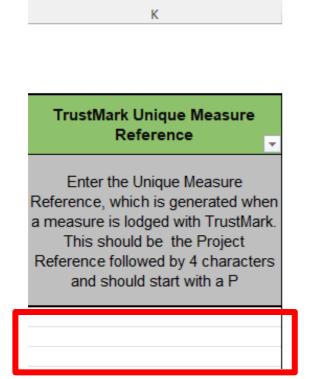
Eligible Measure Cost of Material

Enter the material cost separately from all other costs.

Ensure the material cost is lower than the total cost, which includes installation, to ensure accurate financial reporting.

If there is a discrepancy, review both values and make the necessary corrections.

Guidance for measure details

K

TrustMark Unique Measure Reference
Enter the Unique Measure Reference, which is generated when a measure is lodged with TrustMark. This should be the Project Reference followed by 4 characters and should start with a P

Trustmark details are not required initially, but you should start populating this information as it becomes available. Avoid leaving this task until the end of the scheme

TrustMark Unique Measure Reference
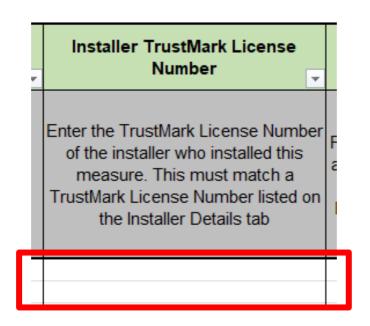
Enter the **Unique Measure Reference**, generated when a measure is lodged with **TrustMark**.

This reference should be the Project Reference followed by 4 characters and must begin with a "P."

This field is **essential** for matching with TrustMark data to verify the DMS data and ensure that all recorded measures are eligible for grant funding.

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Guidance for measure details

Installer TrustMark License Number

A TrustMark License Number must be provided for each installer.

If this number is missing, a validation error will occur.

Please ensure that a valid license number is entered for every installer listed.

Measure details tab

Q. Does every home need a measure associated with it?

A.   Yes, every home submitted must have at least one measure attached.

Homes without measures should not be included in your submission.

Q. What should I know about costs in the "Measure Details" section?

A.   Ensure the material cost is lower than the total cost, which includes installation. This ensures accurate financial reporting.

Q. How can I avoid triggering data validation errors in the template?

A.   Always select measures from the dropdown menu in the "Measure Details" tab to prevent errors during validation. Please refer to the Error key below .

Q. When should I start reporting on measures?

A.   Don't wait until the end of the scheme to report on measures. If properties are completed but measures haven't been recorded in the DMS, now is the time to add them.

Accurate reporting helps track progress and contributes to SHDF statistics published on gov.uk.

Measure details tab

Q. Do I need Trustmark lodgement details to submit measures?

A.   Trustmark details are not required initially, but you should start populating this information as it becomes available. Avoid leaving this task until the end of the scheme.

Q: Why is it important to record installation dates?

A.   Once a measure is installed, complete columns "K" (Trustmark Unique measure reference) and "M" (date of competing installation). Only measures with a completion date will be included in SHDF statistics published on gov.uk.

Trustmark

Q. What is Trustmark lodgement details to submit measures?

A.   Trustmark is the government-endorsed quality scheme that monitors compliance and workmanship standards for energy efficiency projects.

Trustmark lodgements confirm that the work completed aligns with these standards, protecting consumers and maintaining industry quality.
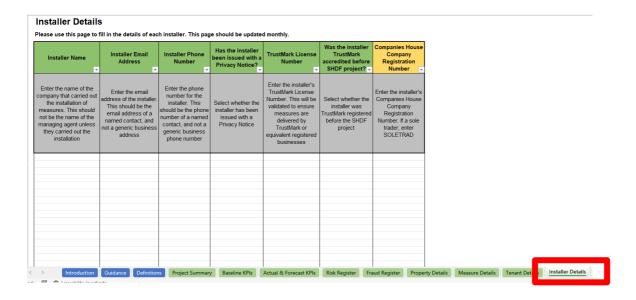
Q. Why are lodgements required for scheme completion?

A.   Lodgement provides a record of the energy efficiency measures implemented and ensures you're your grant-funded projects meet the necessary quality and safety standards.

It is a mandatory requirement. Incomplete lodgements may result in funding recovery or non-compliance penalties.

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Guidance for installer details

TrustMark License Numbers

TrustMark License Numbers (TMLN) are required for each installer in the Installer Details tab and for every row in the Measure Details page.

These numbers ensure compliance with TrustMark standards and create a verifiable link between measures and the installers responsible.

This also ensures that all installations meet quality and safety standards and aligns with government requirements for SHDF projects.

Without accurate TrustMark License Numbers the spreadsheet may fail validation checks.

Installer details tab

Q: My installer has shared their TMLN. What should I do next?

A.   If you haven't already, start adding the TrustMark License Number for each installer as you gather the information. This is a key requirement and ensures compliance with SHDF reporting standards.

Updating this now will make future submissions smoother.

Q: What happens if I don't include the TrustMark License Number?

A.   If TrustMark License Numbers are missing or don't match between the Measure Details page and the Installer Details tab, the spreadsheet will fail validation checks.

This can delay project approvals and impact compliance with TrustMark requirements.

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Error message key

The error key has been created by the department to support GRs in navigating the DMS error message page on the.

This guidance is intended to support GRs in submitting high-quality data reports in a timely manner.

This guidance combines Wave 2.1 and Wave 2.2 DMS error messages as many of them overlap.

The key can also be found in the downloads section of the portal

Troubleshooting errors

1. Access the Error message key. This can be downloaded once you have logged in to the DMS portal in the downloads page

   • Portal link: https://dms-uat.beis.gov.uk/

2. Enable the filter function for Row 3 in the Wave 2 DMS Error Messages tab.

3. Filter Column A ('Error Message') to locate the error message you see on the DMS error message page.

4. Check Column B ('Action to rectify error') for guidance on how to fix the issue.

5. Correct the data and resubmit the revised report to the DMS.

Useful tips:

Double-check data accuracy before submitting to avoid repeated errors.

Ensure all required fields are completed, even if the value is **0**.

Follow the 'Action to rectify error' column for specific corrections.

If unsure, contact the DESNZ Digital Team for further assistance.

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How to locate the error

To find exactly where an error has occurred, carefully read the DMS error message page, which provides details about:

- Tab (which sheet the issue is in)

- Column (which data field has the error)

- Row (which specific data entry is affected)

Example DMS error message:

*Property Details
Column B ('Grant Recipient Property Reference'),
Row (8) - Data Missing"
Column C - "First line of address"
Row (7) - Data Missing
Column D - "Town"
Rows (7, 8) - Data Missing
Column E - "Postcode"
Rows (7, 8) - Data Missing*

Solution:

Go to the **Property Details tab** and enter the missing data in the required fields:
Column B, Row 8 - Enter the Grant Recipient Property Reference
Column C, Row 7 - Enter the First Line of Address
Column D, Rows 7 and 8 - Enter the Town
Column E, Rows 7 and 8 - Enter the Postcode

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Project summary tab

Error message	Action to rectify error
"" not In "Green,Amber Green,Amber,Amber Red,Red"	Please select the RAG rating which most closely matches the current risk status of the project. Column: C
"" not In "Green,Amber,Red,Complete"	Please select the RAG rating which most closely matches the current status of the project. Column: G

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Baseline KPIs tab

Error message	Action to rectify error
Cell values not GreaterThanOrEqualTo "0"	You cannot leave this cell blank. Please enter a value that is zero or greater.
Cell values not LessThanOrEqualTo "0"	You cannot leave this cell blank. Please enter a value.

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Risk register tab

Error message	Action to rectify error
Data failed pattern validation	"In the risk register tab, please enter the first item as 'R001'. This number convention will continue as 'R002', 'R003' etc for subsequent entries. In the fraud register tab, please enter the first item as 'F001'. This number convention will continue as 'R002', 'R003' etc for subsequent entries.No other number convention will be accepted." Column: B
"" not In "Supply Chain,Timescales,Cost Inflation,Covid-19,Consumer Demand,Weather,Fraud,Design Constraints,Procurement,Tenant Engagement,Planning,Asbestos,Scope Changes,Unexpected Conditions,Resourcing,Health & Safety,Access Issues / Customer Refusals,Quality,GDPR,Other"	Please choose an option from the drop-down menu which best matches the type of risk or issue. Column: C

Risk register tab

Error message	Action to rectify error
"" not between "0" and "6"	Please choose the correct option (from 0 to 6) from the drop-down menu. Column: H, I , J, K
"" not between "0" and "26"	Please enter a whole number (no decimals) between 0 and 26. Column: L

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Fraud register tab

Error message	Action to rectify error
"" not In "Fraud,Error"	Please select between the options of 'fraud' or 'error'. Column: C
"" not In "Scheme Process - Controls/Rules Not Followed/Applied,Scheme Process - Mandate Fraud,Scheme Process - Internal Fraud/Collusion,Grant Beneficiary - False Declaration Of Eligibility,Grant Beneficiary - Fake Or Hijacked ID,Property - Ineligible/Non-Existent,Property - False ownership declaration,Property - Measure Already Present/Funded By Previous Scheme,Measure - Not Eligible For Scheme,Measure - Sub/Non-Standard,Installer - Not Competent/Qualified In Relevant Measure/Service,Installer - Price Inflation/Overstated Work,Installer - Claimed for Incomplete/Non-Existent Work,Other"	Please choose an option from the drop-down menu that best matches the reason you suspect fraud or an error. Column: D

Fraud register tab

Error message	Action to rectify error
"" not In "Homeowner,Landlord,Installer,Grant Administrator,Other"	Please choose an option from the drop-down menu which best matches the status of the person or organisation suspected of fraud or making an error. Column: I
not In "Homeowner,Landlord,Installer, Grant Administrator,Other,Occupant" **(specific to wave 2.2 data reporting template)**	Please choose an option from the drop-down menu which best matches the status of the person or organisation suspected of fraud or making an error. Column: I
"" not In "Under Investigation,Determination Reached - No Further Action,Determination Reached - Resolution in Progress,Determination Reached - Resolution Complete"	Please choose an option from the drop-down menu which best matches the status of the issue you are reporting. Column: P

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Property details tab

Error message	Action to rectify error
"" not In "Detached,Semi-detached,Mid-terrace,End-terrace,High rise flat (6+ Storey),Medium rise flat (3-5 Storey),Low rise flat (1-2 Storey),Park Home,Bungalow,Other"	Please choose an option form the drop-down menu which best matches the property type. Column: G
"" not In "Cavity Wall,Solid Wall,Cavity Wall using a solid wall cost cap,Other"	Please choose an option from the drop-down menu which best matches the type of wall in the property. Column: H
"" not In "Owner Occupied,Private Rented,Social Rented"	Please choose an option from the drop-down menu which best matches the type of wall in the property. Column: I
"" not In "On gas grid,Off gas grid"	Please choose an option from the drop-down menu which best matches the property's grid status. Column: L

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Property details tab

Error message	Action to rectify error
"" not In "Mains gas,Liquid Petroleum Gas (LPG),Oil,Electricity,Coal,Biomass, Other"	Please choose an option from the drop-down menu which best matches the type of fuel type. Column: M

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Measure details tab

Error message	Action to rectify error
"" not In "Loft Insulation,Cavity Wall Insulation,Underfloor Insulation,External Wall Insulation,Internal Wall Insulation,Flat Roof Insulation,Room in Roof Insulation,Air Source Heat Pump,Ground Source Heat Pump,Shared Ground Loop,District Heat Network,Communal Heat Network,High Temperature Heat Pump,Hybrid Boiler,Solar PV,Draughtproofing,Ventilation, Double Glazing,Low Energy Lighting,Heating Controls,Other"	Please choose an option from the drop-down menu which best matches the type of installation. Column: C
Value is not a valid date	Please use the date format dd/mm/yyy (for example 01/11/2024) in this section. No other format will be accepted. Column: L

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Measure details tab

Error message	Action to rectify error
"" not In "Air Source Heat Pumps,Batteries,Biomass,Biomass room heater with boiler,Cavity Wall Insulation,Communal Heat Networks,Direct Electric Heaters,Double or Triple Glazing Windows,Draughtproofing,External Wall Insulation,Flat roof insulation,Ground Source Heat Pumps,Heating controls,High Retention Storage Heaters,High Temperature Heat Pumps,Hot water cylinder thermostat,Hot water cylinder insulation,Hybrid boilers,Internal wall insulation,Loft Insulation,Low Carbon District Heating,Low energy lighting,Other,Room in roof insulation,Shared Ground Loops,Smart or Digital Controls,Solar PV,Solar Thermal,Underfloor Insulation,Ventilation,Wet central heating" **(specific to wave 2.2 data reporting template)**	Please choose an option from the drop-down menu which best matches the type of installation. Column: C

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Tenant details tab

Error message	Action to rectify error
"" not In "Yes,No"	Please choose from the options 'yes' or 'no'. Column: F

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Installer details tab

Error message	Action to rectify error
"" not In "Yes,No"	Please choose from the options 'yes' or 'no'. Column: G

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