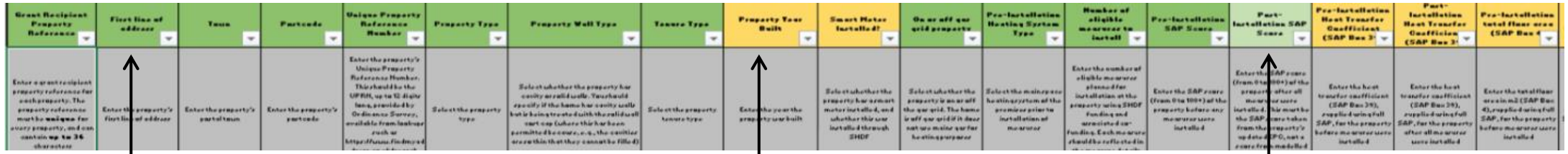
Inputting data into the Excel template

DMS Monthly reporting

SHDF Wave 2- March 2025

Understanding column colours



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

Yellow columns: 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.

Light green columns: 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.

General guidance

Dropdown lists:

Some columns have predefined values; manually typing values outside these lists will cause errors.

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. Enter data manually or use the provided selections

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

Consistent formatting:

Dates: Must be in DD/MM/YYYY format.

Numbers: Do not include symbols or text in numeric fields.

Postcodes: Ensure accuracy. Use www.FindMyAddress.co.uk to validate.

General guidance

Q: What if I miss a mandatory field?

A: The submission will fail. Check all dark green cells and complete them.

Q: How do I fix an "Invalid Data Format" error?

A: Ensure dates are in DD/MM/YYYY format and numbers don't contain text or symbols.

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 and data dictionary?

A. The latest version can be found on the government portal in the downloads section https://dms-uat.beis.gov.uk/

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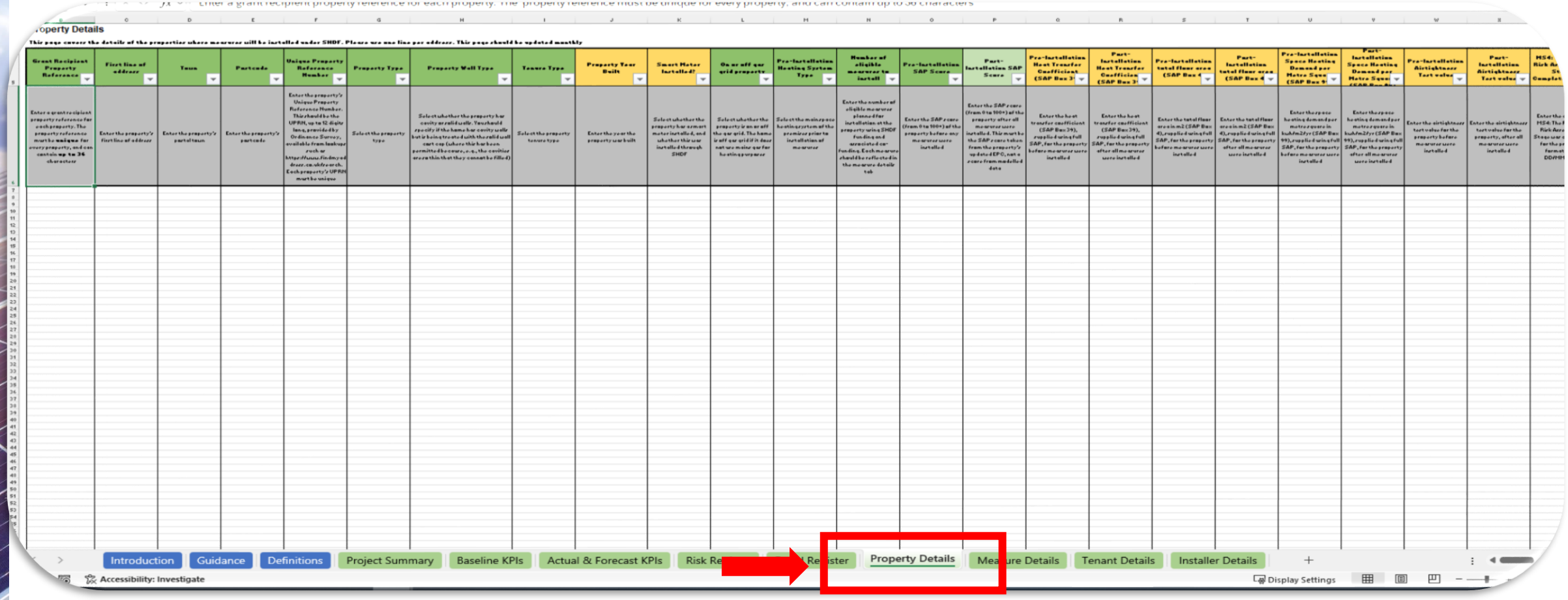
Completing key sections

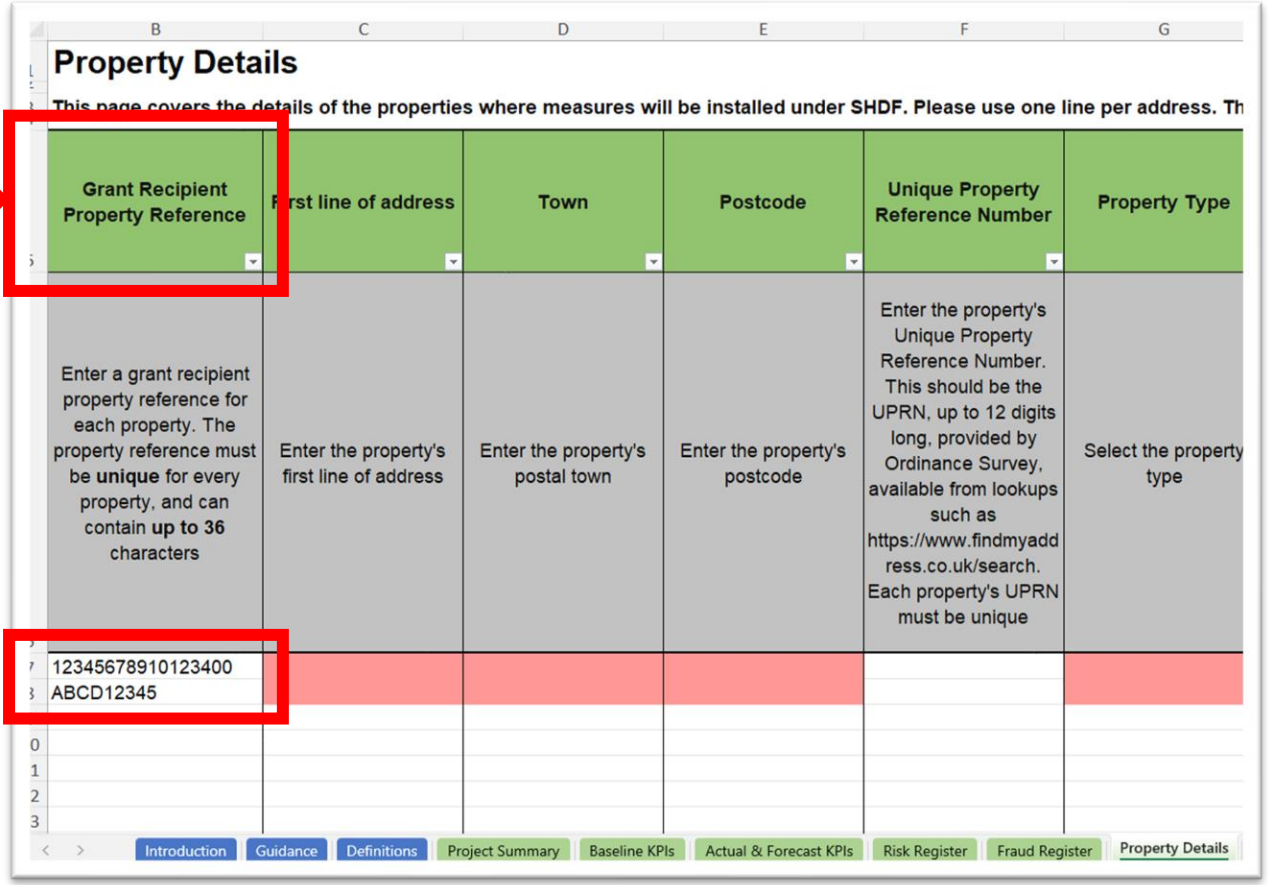
DMS Monthly reporting

SHDF Wave 2- Feb 2025

Property details



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. Th

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
12345678910123400					
ABCD12345					

Introduction | Guidance | Definitions | Project Summary | Baseline KPIs | Actual & Forecast KPIs | Risk Register | Fraud Register | Property Details

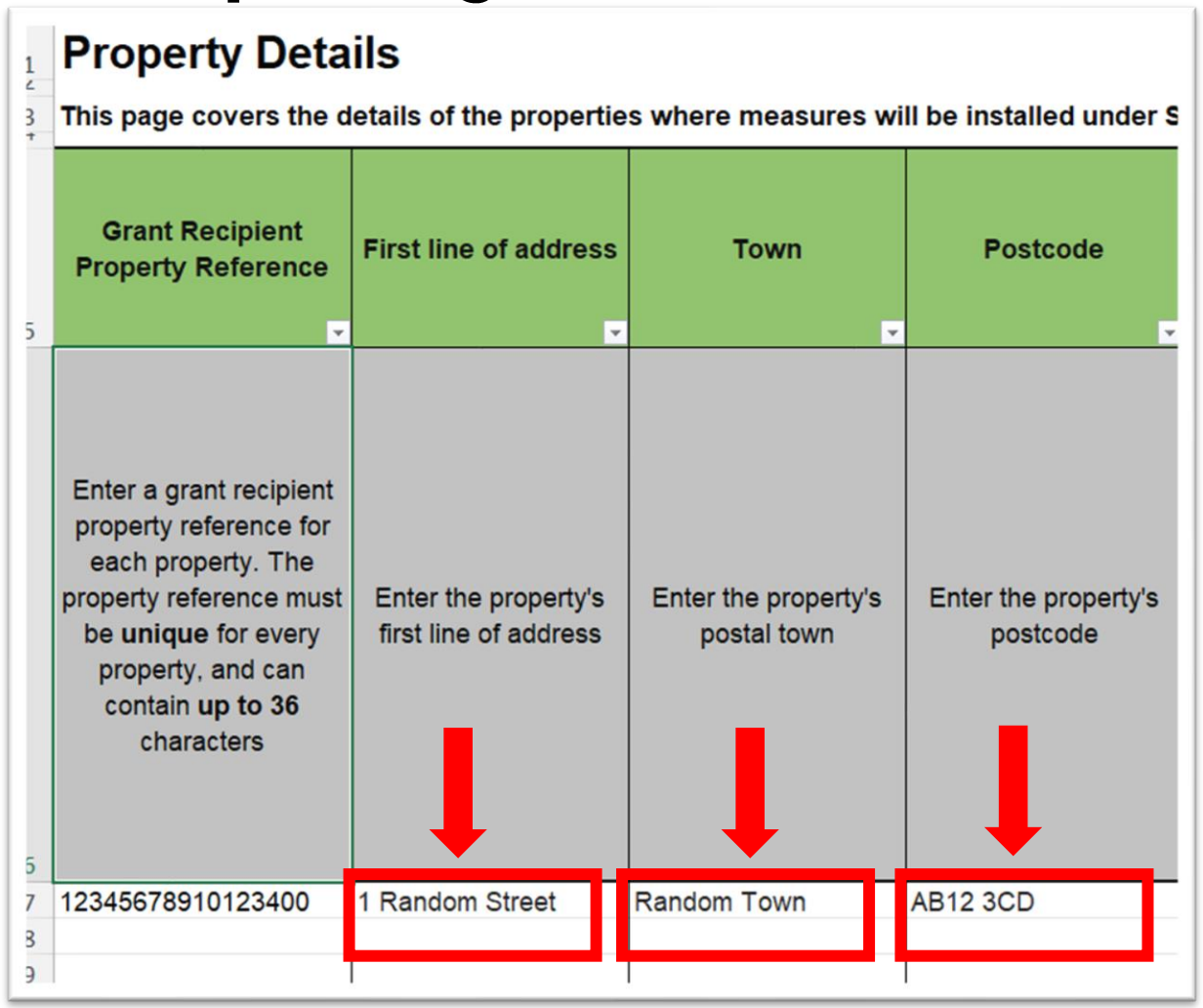
To ensure the property record is included in the published statistics, please complete the '**Grant Recipient Property Reference**' column.

Each Grant Recipient Property Reference must be unique, as duplicate entries are removed.

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

Ensure you are entering a unique reference for each property

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	AB12 3CD

Please ensure that the **first line of address, town,** and **postcode** are accurately completed for each property listed.

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

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	12345678910

Please enter the **Unique Property Reference Number (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.

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	123456789		

- 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

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.

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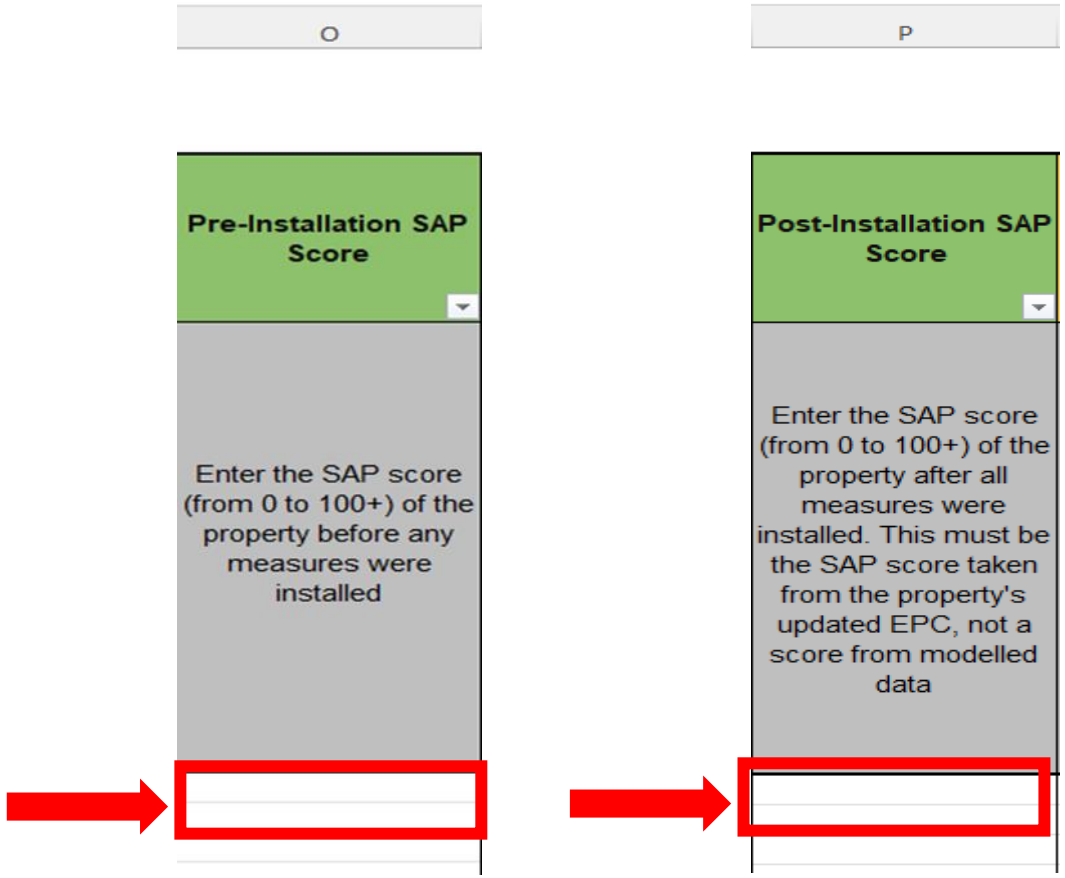
Property details



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.

Measure details

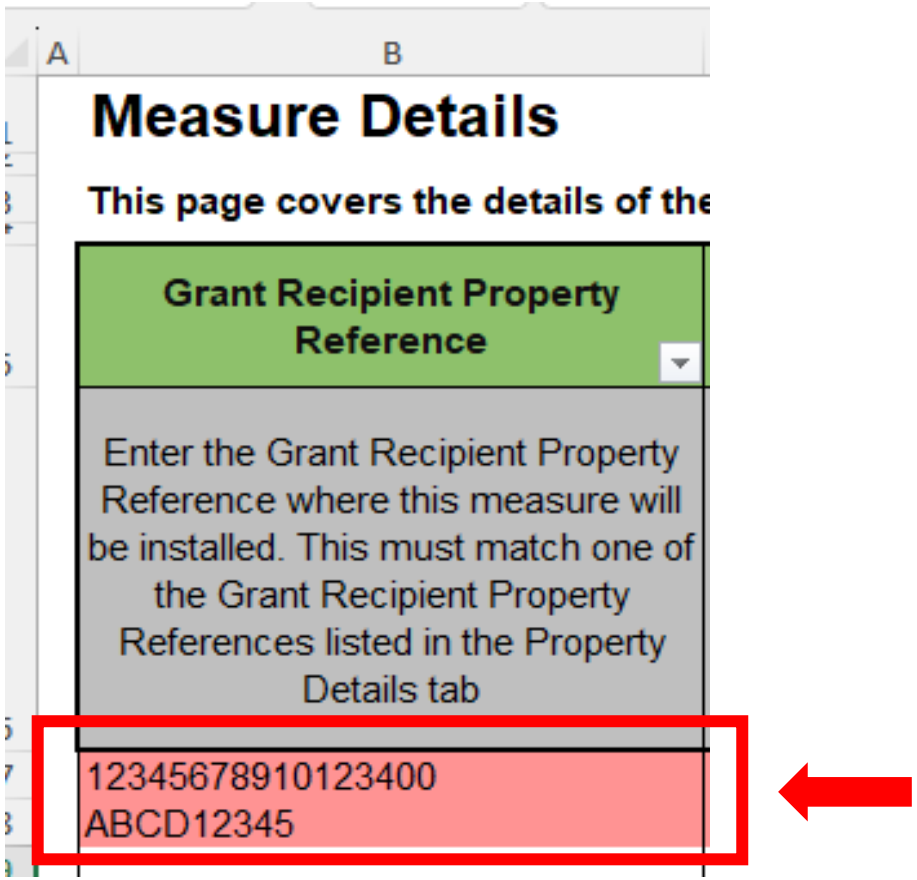
Measure Details

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 R... | ...erty ...etails | Measure Details | Ten...nt Details | Installer Details

Measure details

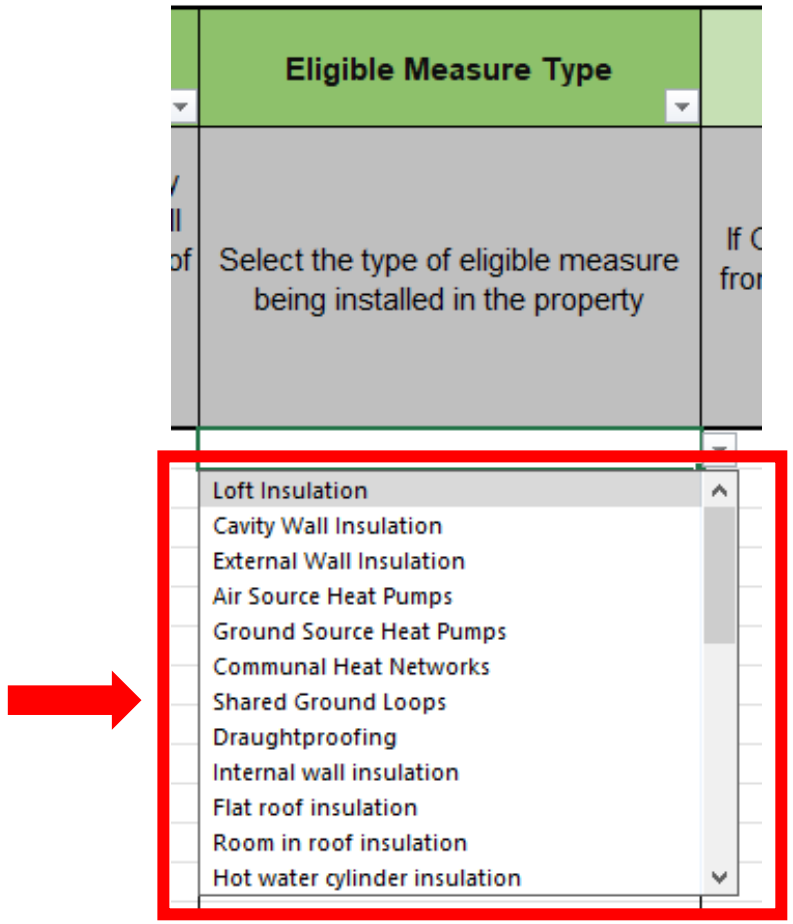


Please ensure that a unique reference is entered for each property, matching the **Grant Recipient Property Reference** provided in the Property Details tab.

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.

Measure details



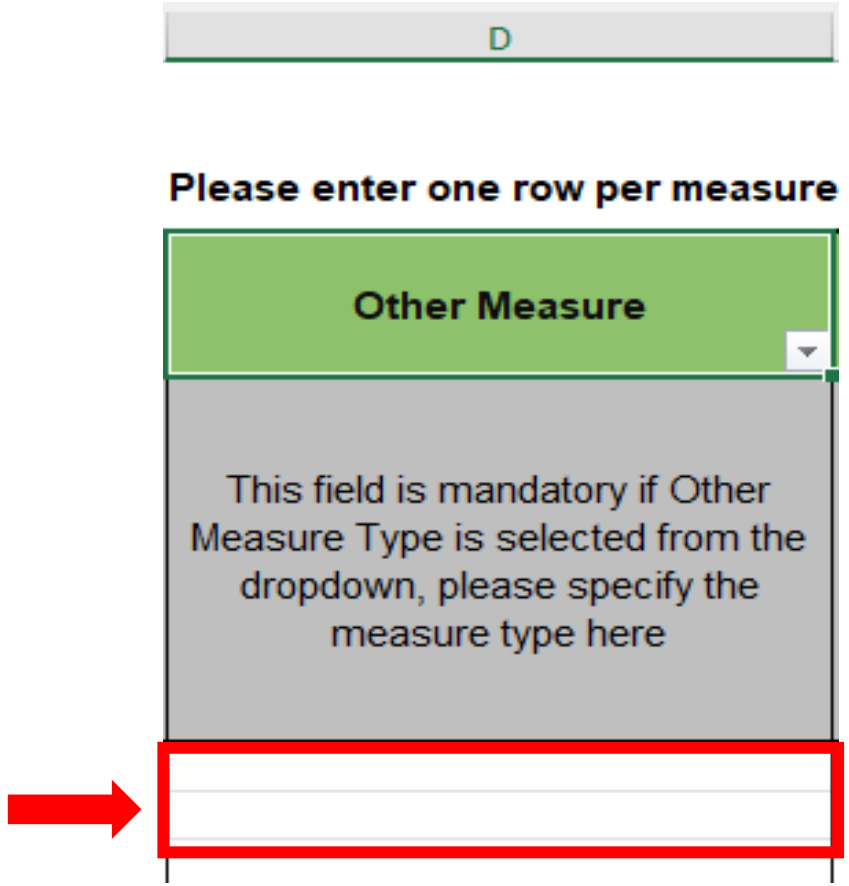
Select the type of eligible measure being installed in the property from the available options.

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.

Measure details

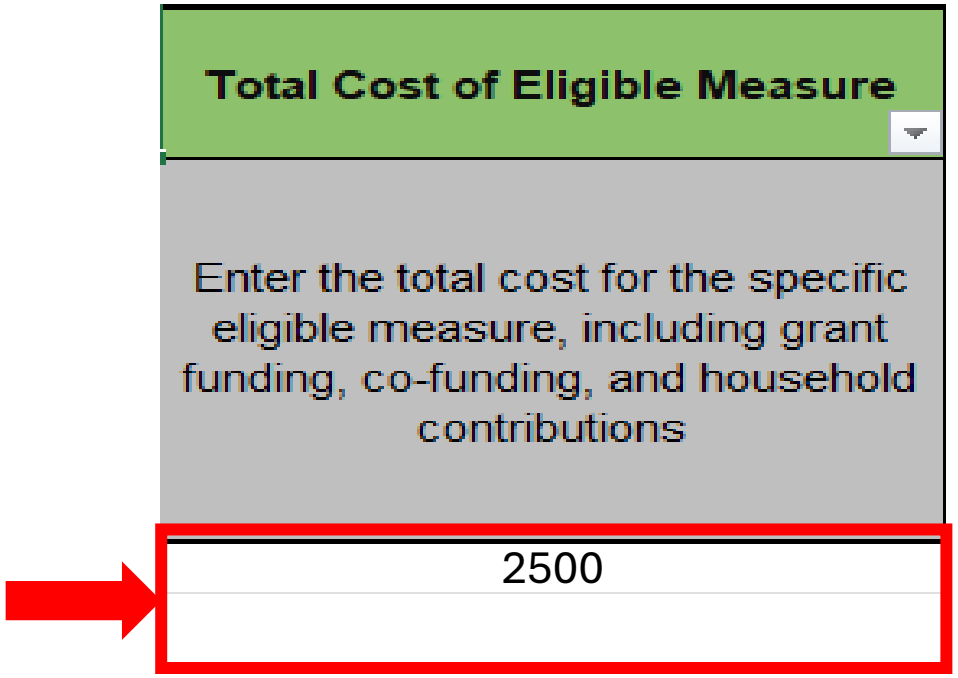


If **'Other Measure Type**' is selected from the dropdown in the **'Eligible Measure Type' c**olumn, please specify the measure type in this field.

This is mandatory when 'Other' is chosen as the eligible measure type. If left blank, the measure record cannot be included in the published statistics.

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

Measure details



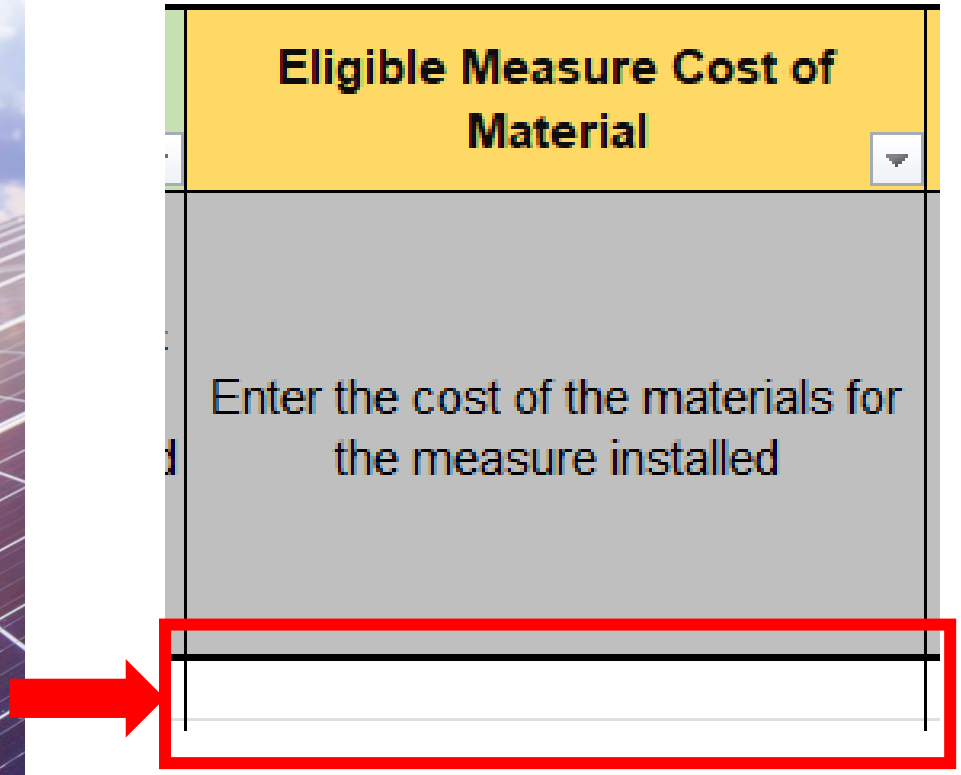
Enter the **total cost** for the specific eligible measure as a numeric value, including grant funding, co-funding, and household contributions.

Only numbers should be entered—avoid using currency symbols, commas, or any text.
For example: Instead of entering £2,500 or 2,500 GBP, enter **2500**.

If you encounter an error, check for extra characters, such as pound signs, commas, or letters, and remove them.

This data is essential for calculating the average cost of each measure type in the published statistics.

Measure details

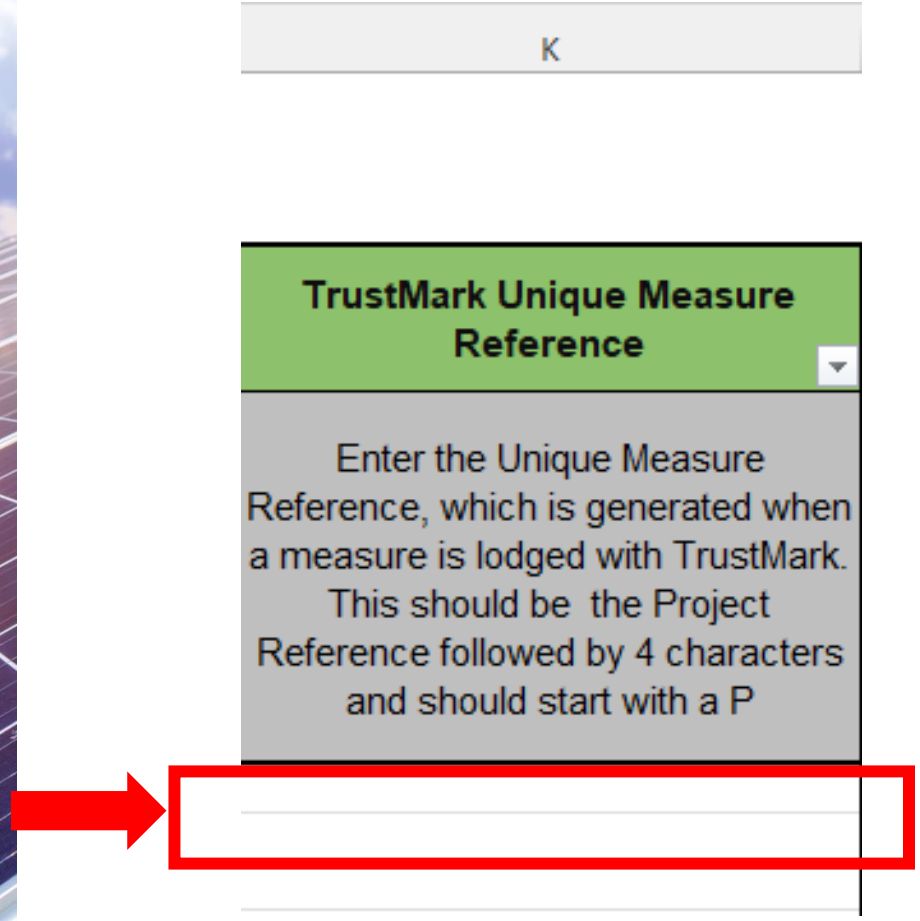


Enter the material cost separately from all other costs.

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.

Measure details



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.

Actuals & 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-2024	Mar-2024	Apr-2024	May-2024	Jun-2024	Jul-2024	Aug-2024
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 CUMULATIVE. Each following month should include all previous data (e.g. Jul = Mar+Apr+May+. Past and current months should be actual values; Future months should be forecast values. The total value s																	
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 Sum | KP | Actual & Forecast KPIs | Risk Register | Fraud Register | Property Details | Measure Details | Tenant Details | Installer Details

Actuals & Forecast KPIs

Best practices:

- **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.

Example:

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-2024	Mar-2024	Apr-2024	May-2024	Jun-2024	Jul-2024
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 CUMULATIVE. Each following month should include all previous data (e.g. Jul = Ma Past and current months should be actual values; Future months should be forecast values. The																
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)	0	0	0	0	0	0	0	0	0	0	10	15	23	23	27	20	
KPI1 – Number of																		

Understanding error messages

DMS Monthly reporting

SHDF Wave 2- Feb 2025

Troubleshooting errors

Steps to fix errors:

1. Enable the filter function for Row 3 in the Wave 2 DMS Error Messages tab.
2. Filter Column A (‘Error Message’) to locate the error message you see on the DMS error message page.
3. Check Column B (‘Action to rectify error’) for guidance on how to fix the issue.
4. 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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Example error message and solution

Example 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:

Navigate to Property details Tab

Column	Row	Error	Solution
B	8	Data missing	Enter the **Grant Recipient Property Reference**
C	7	Data missing	Enter the **First Line of Address**
D	7, 8	Data missing	Enter the **Town**
E	7,8	Data missing	Enter the **Postcode**