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Guidance Session: Using the New Online Portal and Monitoring and Reporting Forms

22 April 2026

Welcome



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Please mute microphones to limit disruption



If you are not speaking, please turn off webcams to improve video quality



Please ask questions using the Q&A functionality



This webinar is being recorded and slides will be distributed after

Agenda



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Session	Presenters
Using the HNES Online Portal	Louise Singleton, HNES Programme Manager
Grant Claims	Katy Ansari, HNES Application and Assessment Lead
Monitoring and Reporting	Alison Sanders, HNES Monitoring & Reporting Lead
Case Studies and Final Optimisation Reports	Louise Singleton, HNES Programme Manager
Q&A	All



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Using the HNES Online Portal

Louise Singleton, HNES Programme Manager

When to start using the portal

FY25/26 – SharePoint spaces

- Evidence of spend for accrued funding awarded in FY25/26
- Final Optimisation Studies and Techno-Economic Analysis for projects that completed in FY25/26
- Case studies for projects that completed in FY25/26
- March M&R return

FY26/27 – online portal

- Evidence of spend for funding awarded in FY26/27 onwards
- Final Optimisation Studies and Techno-Economic Analysis for projects that complete in FY26/27
- Case studies for projects that completed in FY26/27
- April monthly M&R return



Portal log in

1. You access the online portal via <https://hnes.talansm.com>
2. New users will receive an email from noreply@talansm.com with temporary login details. The password expires after 7 days, so log in and change it as soon as possible
3. Existing portal users will be able to see their R1-9 projects on their project dashboard once they have been set up



Online Application Portal Walkthrough

Projects

M&R Reports

Home > Projects

Projects

Search all columns...

☐	Project Ref ↑↓	Project Name ↑↓	Funding Round ↑↓	Status ↑↓	Internal Status ↑↓	Application Type ↑↓	Organisation Type ↑↓	Applicant Org...
	Filter Projec	Filter Project Name	Filter Fundir	Filter Status	Filter Internal Status	Filter Applic	Filter Organisation T	Filter App
☐	HNES_MAIN_00926	HNES Webinar Round 12 Te...	Round 12	Application Draft		Capital	Housing Association	Talan Housing
☐	HNES_MAIN_00783	HNES Webinar Test Project	Round 10	Application Submitted		Capital	Private Company	Gemserv

Showing 1-2 of 2 results

« < Page 1 of 1 > »



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Grant Claims Process

Katy Ansari, HNES Application and Assessment Lead

Uploading a document

1. From the Projects dashboard, click the 'Go to Documents' icon:

Home > Projects

Projects

[+ Create Project](#)

Search all columns...

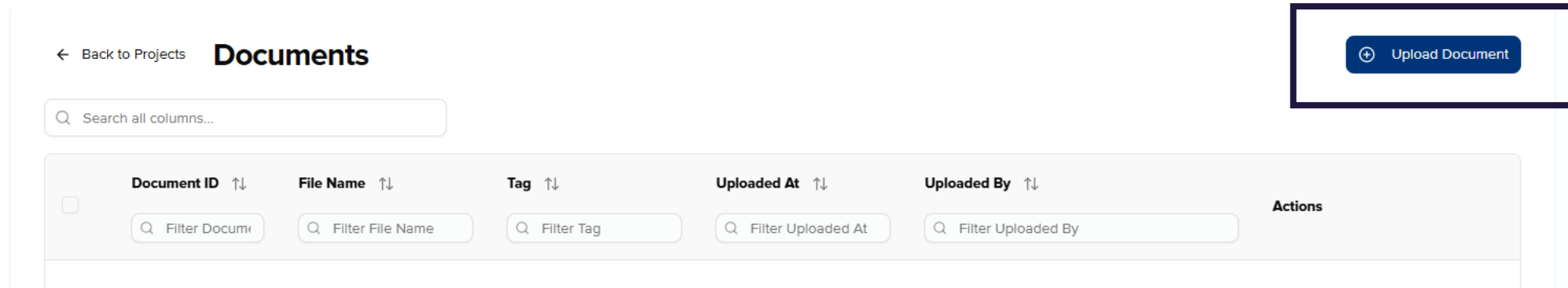
Funding Round	Status	Internal Status	Application Type	Organisation Type	Applicant Organisation	Actions
Filter Funding Round	Filter Status	Filter Internal Status	Filter Application Type	Filter Organisation Type	Filter Applicant Organisation	
Funding Round 12	Project Awarded Full Funding		Capital	Housing Association	Talan Housing	     

Go to Documents



Uploading a document

2. Click the 'Upload Document' button:



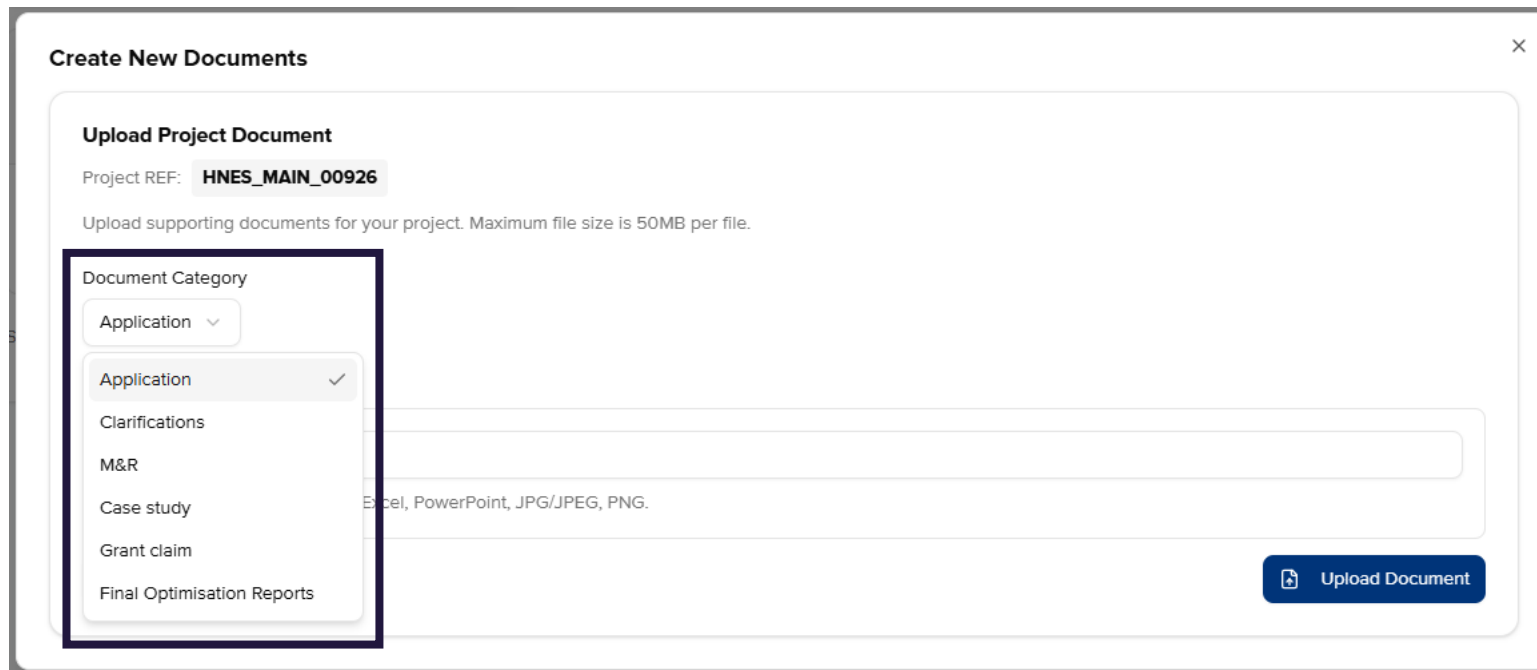
The screenshot shows a web interface for managing documents. At the top left, there is a link '← Back to Projects' and a title 'Documents'. Below the title is a search bar with the placeholder text 'Search all columns...'. To the right of the search bar, a red box highlights a blue button with a plus icon and the text 'Upload Document'. Below these elements is a table with the following columns: 'Document ID' (with a sort icon), 'File Name' (with a sort icon), 'Tag' (with a sort icon), 'Uploaded At' (with a sort icon), 'Uploaded By' (with a sort icon), and 'Actions'. Each of the first five columns has a filter input field below its header. The 'Actions' column is currently empty.

Document ID ↑↓	File Name ↑↓	Tag ↑↓	Uploaded At ↑↓	Uploaded By ↑↓	Actions
Filter Document ID	Filter File Name	Filter Tag	Filter Uploaded At	Filter Uploaded By	



Uploading a document

3. Under the Document Category dropdown, select 'Grant claim':

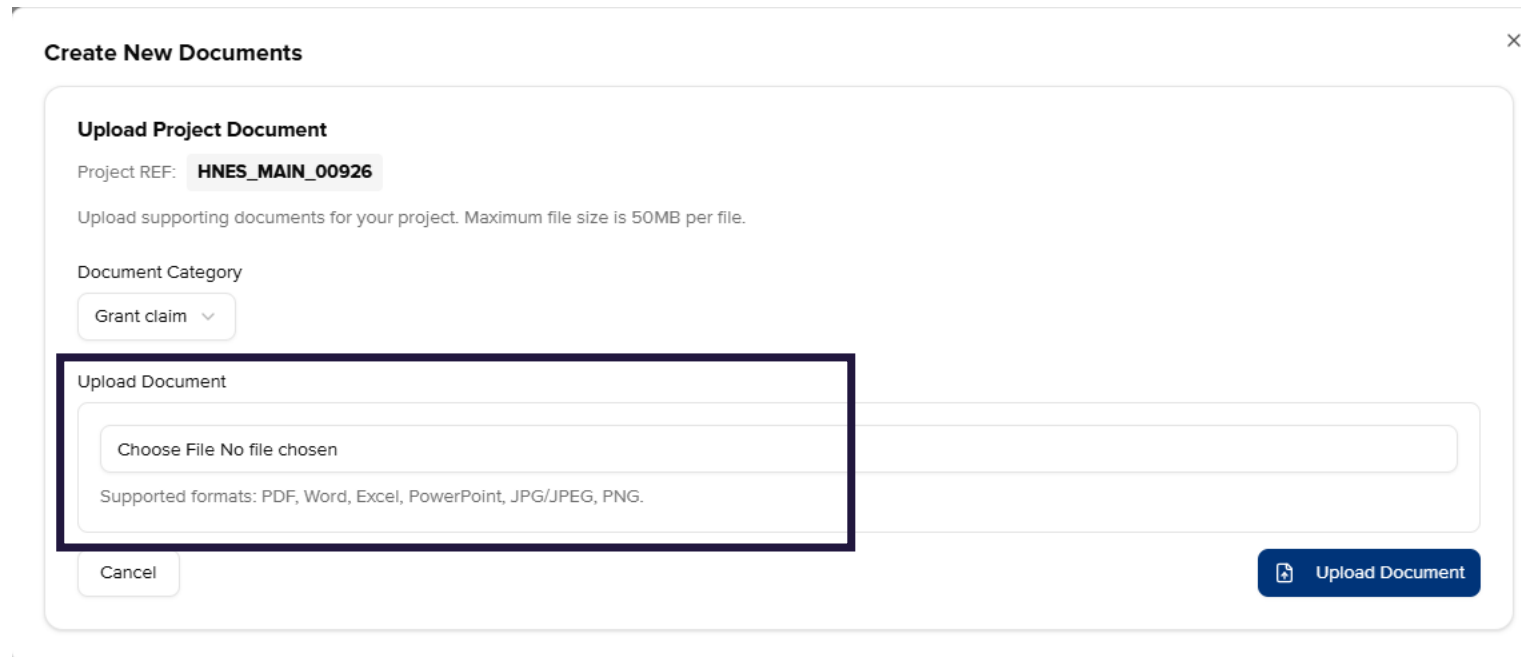


The screenshot shows a web form titled "Create New Documents" with a close button (X) in the top right corner. Inside the form, there is a section titled "Upload Project Document". Below this title, the "Project REF:" is displayed as "HNES_MAIN_00926". A note states: "Upload supporting documents for your project. Maximum file size is 50MB per file." Below the note is a "Document Category" dropdown menu. The dropdown is open, showing a list of options: "Application" (which is highlighted with a checkmark), "Clarifications", "M&R", "Case study", "Grant claim", and "Final Optimisation Reports". To the right of the dropdown is a large text input field with a placeholder that says "Excel, PowerPoint, JPG/JPEG, PNG." At the bottom right of the form is a blue button labeled "Upload Document" with a document icon.



Uploading a document

4. Click 'No file chosen' to select the file to upload, then click 'Upload Document':



The screenshot shows a web form titled "Create New Documents" with a close button (X) in the top right corner. The form contains the following elements:

- Upload Project Document** section:
 - Project REF: **HNES_MAIN_00926**
 - Text: "Upload supporting documents for your project. Maximum file size is 50MB per file."
 - Document Category: A dropdown menu with "Grant claim" selected.
- Upload Document** section (highlighted with a red box):
 - A button labeled "Choose File No file chosen".
 - Text: "Supported formats: PDF, Word, Excel, PowerPoint, JPG/JPEG, PNG."
- At the bottom left is a "Cancel" button.
- At the bottom right is a blue "Upload Document" button with a document icon.

NB. The maximum file size is 50MB

Uploading a document

5. Your chosen file appears. You then press the 'Upload Document' button:

Create New Documents

Upload Project Document

Project REF: HNES_MAIN_00926

Upload supporting documents for your project. Maximum file size is 50MB per file.

Document Category

Grant claim

Upload Documents

Choose File Test Grant Claim form.docx

Supported formats: PDF, Word, Excel, PowerPoint, JPG/JPEG, PNG.

Test Grant Claim form.docx (0.01 MB)

Cancel

Upload Document

Uploading a document

6. Your file appears in your Documents list:

🏠 > Projects > HNES_MAIN_00926 > Documents

[← Back to Projects](#) **Documents** [+ Upload Document](#)

☐	Document ID ↑↓	File Name ↑↓	Tag ↑↓	Uploaded At ↑↓	Uploaded By ↑↓	Actions
☐	Filter Document ID	Filter File Name	Filter Tag	Filter Uploaded At	Filter Uploaded By	
☐	HNES_MAIN_00926...	Test Grant Claim form.docx	Grant claim	20 Apr 2026, 14:42	hnes@talan.com	

Showing 1-1 of 1 results

[«](#) [<](#) Page 1 of 1 [>](#) [»](#)



Downloading a document

7. To download a file, select the tick box next to each file and press download:

🏠 > Projects > HNES_MAIN_00926 > Documents

[← Back to Projects](#) **Documents** [+ Upload Document](#)

1 item selected [Clear selection](#) [Download](#)

☐	Document ID ↑↓	File Name ↑↓	Tag ↑↓	Uploaded At ↑↓	Uploaded By ↑↓	Actions
☒	HNES_MAIN_00926...	Grant Claim Form Annex S9...	Grant claim	20 Apr 2026, 14:53	hnes@talan.com	



Grant Claims Overview

1. Your Grant Claim form will be uploaded by HNES into your 'Documents' section
2. Download and complete the form, then reupload along with your supporting evidence (invoices, remittance etc.)
3. Please reference the relevant supporting files for the particular grant claim in your grant claim form
4. Make sure to name the files in a clear way to allow us to match your evidence to your grant claim form





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Monitoring and Reporting

Alison Sanders, HNES Monitoring & Reporting Lead

M&R Dashboard

Projects

M&R Reports

- M&R status: Draft, Submitted, Errors, Approved
- The submission deadline date is in the format YYYY-MM-DD

M&R Reports

Q Search all columns...

Project Ref ↑↓

Q Filter Projec

Project Name ↑↓

Q Filter Projec

M&R Form Type ↑↓

Q Filter M&R F

Funding Round ↑↓

Q Filter Fundir

Project Status ↑↓

Q Filter Project Status

M&R Status ↑↓

Q Filter M&R Status

Application Type ↑↓

Q Filter Applic

HNES_TEST_00008

Marsh and Sons

HNES Monthly Capi...

Round 6

Project Awarded Full Fundi...

Draft

CAPITAL

Reporting Month ↑↓

Q Filter Repor

Submission Deadline ↑↓

Q Filter Submission Deadline

Applicant Organisation ↑↓

Q Filter Applicant Organisation

Actions

Mar-26

2026-04-30

Briggs LLC



M&R Key Points

M&R forms	• M&R forms will be issued in the M&R area of the online portal on 7th of the month after the reporting month. • Deadline for completion is the last working day of the month after the reporting month • 2 types of forms for capital projects - monthly and quarterly, and a monthly revenue form
Monthly returns	• Completed monthly from signature of GFA/MoU until the capital project is fully commissioned or revenue project is finished
Capital quarterly returns	• Completed quarterly from signature of GFA/MoU until 2 years after the project is commissioned • The capital quarterly reporting months are March, June, September and December
Pre-filled cells	• White cells are for data entry. Unlike the Excel forms, only some cells are pre-filled from the previous M&R return and other data will need to be entered each month/quarter • Grey cells are locked and are either pre-filled or calculated automatically
Layout	• Monthly - Section A: Contacts, project progress and supply chain information (new), Section B: Actual and expected grant drawdown and match funding spend, Section C: Risk status and risk register • Quarterly: Section A: Contacts, Section B: Network Energy Generation, Section C: Network Performance



Monthly M&R return

Section A – Project Information

Section A - Project Information

Project details

C1:C4		fx		
	A		B	
1	Reporting month			
2	Heat Network name			
3	HNES project reference number			
4	Name of grant recipient (organisation or company)			

- This table shows the reporting month and the project details from the application form
- The fields are for information only and are non-editable



Section A – Project Information: Contacts Details

Monitoring form completed by

First Name *

Enter text

Last Name *

Enter text

Email address *

Enter text

Telephone number *

Enter text

Project responsible officer

First Name *

Enter text

Last Name *

Enter text

Email address *

Enter text

Telephone number *

Enter text

- Details of the person completing the form and the person with overall responsibility for the project
- This information will be carried forward each month from the previous return but should be checked and updated on each return as they will be contacted if we have queries
- For ongoing projects, the data will be imported from the January return



Section A – Project Information: Service Providers

Service providers

Project delivery consultant: organisation name (or N/A if not relevant) *

Enter text

Project principal delivery contractor for HNES works: organisation name *

Enter text

Project Metering & Billing contractor: organisation name (or N/A if not relevant) *

Enter text

- Capital projects should fill in the main delivery contractor once they are appointed
- The delivery consultant and Metering and Billing contractor should be filled in if applicable
- The data will be carried forward each month, so please review it each month and update if necessary



Section A – Project Information: Project Progress

Project Activity

 This section must be updated each month to show activity in the reporting month above and planned activity in the month after the reporting month

Project activity undertaken in reporting period (Max 300 words)

A summary of the HNES activities undertaken/completed in the period covered by the current M&R return (max 300 words)

Project activity planned for next reporting period (Max 300 words)

A forward-look summary of the HNES activities that will be undertaken in the period covered by the next M&R return. (Max 300 words)

Adjustments to project delivery since the last reporting period (or N/A if not applicable) (Max 300 words)

A summary of any adjustments to the project scope or programme since the previous reporting period that impact on delivery of the project's HNES funded measures. (Max 300 words)

- Please provide a brief summary of work carried out during the reporting month and the planned activity in the following month, and any adjustments in the scope or delivery timeline – information not pre-filled
- This will allow us to monitor the project progress and identify any issues at an early stage



Section A – Project Information: Milestones

 **Project Milestones**

Review your project plan each month and enter the latest actual and expected project milestone dates

  |   | .0+ .00+ | B I   | A ▼ |  ▼  ▼  ▼

F1:F6 fx

	A	B	C	D	E
1		Application milestone dates	Latest milestones DD/MM/YYYY	Check sequential	Check valid date
2	Procurement live				
3	Procurement complete				
4	Start of construction / delivery				
5	Anticipated completion of installation			Dates must be sequential	
6	Anticipated completion of commissioning				

- The application milestone dates in column B are taken from the application form and are non-editable
- Enter the latest actual and estimated project milestone dates in column C. The first 3 dates will be brought forward from the previous return, so please ensure you review them each month and update if necessary
- For capital, the anticipated completion of installation and completion of commissioning dates in C5 and C6 need to be entered each month. For revenue, the study completion date will need to be entered. These should be the best current estimates
- Column D shows an error message if the dates are not sequential. Column E shows a red triangle in the top left corner and an error message when moused over if the date is not in the format DD/MM/YYYY



Section A – Project Information: Supply Chain Information (capital only)

Supply chain information

If you are procuring any dwelling-level heat meters, please provide details

	A	B	C	D
1		Dwelling-level heat meters		
2		Manufacturer	Make/model	Number of units
3	Product 1			
4	Product 2			
5	Product 3			

- Dwelling-level heat meters
- Network-level heat metering
- Dwelling-level HIUs
- Network-level heat exchangers
- Metering & Billing software

- The data will be carried forward from the previous M&R return, so please review it each month and update it if necessary
- DESNZ analyse this data to gain a better understanding of the market for heat network products

Monthly M&R return

Section B – Funding Status

Pre-filled financial information from the Grant Funding Agreement / Memorandum of Understanding for reference

    .0  .00  B <i>I</i>  <u>U</u> <u>A</u>    		
B13	fx	59000
	A	B
1		Grant awarded per financial year (£)
2	2023/24	0.00
3	2024/25	8000.00
4	2025/26	20000.00
5	2026/27	0.00
6	2027/28	0.00
7	2028/29	0.00
8	2029/30	0.00
11	Total Grant	28000.00
12	Total Match Funding	31000.00
13	Total Project Cost	59000.00

- The first table in this section shows the amount of HNES grant funding awarded to the project for each financial year, the total grant awarded, total match funding and total project cost.
- These fields are taken from the GFA or MoU and are non-editable



Section B – Funding Status: Grant Claims

Grant Claims

Grant claims made up to and including the reporting month

	A12	fx											
	A	B	C	D	E	F	G	H	I	J	K	L	M
		Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar
1	2023/24												
2	2024/25												
3	2025/26	0	0	0	2500	0	0	0	0	0	0	4000	13800
4	2026/27	0	0	2000									
5	2027/28												
6	2028/29												
7	2029/30												

Forecast grant claims

	B16	fx											
	A	B	C	D	E	F	G	H	I	J	K	L	M
		Apr	May	June	July	Aug	Sept	Oct	Nov	Dec	Jan	Feb	Mar
1	FY 2023/24												
2	FY 2024/25												
3	FY 2025/26												
4	FY 2026/27				0	0	0	0	6000	0	0	0	0
5	FY 2027/28	0	0	0	0	0	0	0	0	0	0	0	0
6	FY 2028/29	0	0	0	0	0	0	0	0	0	0	0	0
7	FY 2029/30	0	0	0	0	0	0	0	0	0	0	0	0

- Some cells will be greyed out where not applicable
- Enter the grant claims already made in the top table - the data will be brought forward from the previous M&R return but please update to include grant claims made in recent months
- Show when you expect to make future grant claims in the second table. Data is not brought forward and needs to be entered each month and must be as accurate as possible as DESNZ use it for financial forecasting



Section B – Funding Status: Match Funding Spend

[illegible]

- Some cells will be greyed out where not applicable
- Enter the match funding already spent in the top table. The data will be brought forward but please update to include match funding spent in recent months
- Show when you expect to spend match funding in future in the second table. Data will not be brought forward

Section B – Funding Status: Funding Narrative

Funding Narrative

Supporting narrative to the grant and match funding values submitted, including (if relevant) explanation of any variance between the grant and match funding amounts entered here and the grant and match funding amounts from the GFA/MoU (Max 300 words)

Funding narrative text 

0/2400 characters

- Enter text to justify the grant and match funding figures entered and explain any variance
- If you anticipate any issue claiming the grant within the financial year for which it was awarded, or if you have an underspend, please contact us at hnes@talan.com as soon as possible



Monthly M&R return

Section C – Project Risk: Risk Status

 Risk Status 

 Indicate the level of risk to the project using the Red-Amber-Green system: Green = project delivery on track; Amber-Green = project delivery likely; Amber = medium risk to project delivery; Amber-Red = medium/high risk to project delivery; Red = high risk to project delivery

Overall Project RAG

Select an option 

RAG Rating Explanation

Explain the RAG rating above (Max. 300 words)

0/2400 characters

- Select the overall project risk from the dropdown list and explain why you have selected the rating in the text box
- This data will not be carried forward and must be entered each month
- This is reviewed by the HNES team each month to identify any high-risk projects that may need extra support



Section C – Project Risk: Risk Register

Project Risk Register

J1:J12	fx					
	A	B	C	D	E	F
1		Risk 1	Risk 2	Risk 3	Risk 4	Risk 5
2	Risk description					
3	Risk group / risk category					
4	Impact					
5	Likelihood					
6	Risk rating					
7	Proposed risk mitigation description					
8	Mitigation in place?					
9	Residual impact					
10	Residual likelihood					
11	Residual risk rating					
12	Reduction in risk rating following mitigation					

- The risk description, type and mitigation will be brought forward each month – these should be reviewed and scored
- The risk group and category have been combined into one dropdown (same options apply)
- Impact and likelihood and residual scores will not be brought forward and will need to be entered each month
- The risk rating and residual risk rating are calculated automatically from the impact and likelihood options selected
- The residual risk rating after mitigation should not be higher than the original risk rating
- A summary of all risks (type and severity) is reported to DESNZ each month



Quarterly M&R returns

Network Energy Generation

Network Energy Generation										
🔒 🔓 ↶ ↷ 0.00 0.00 B I 🔗 U A ≡ ÷ H										
J16	fx	Revised target								
	A	B	C	D	E	F	G	H	I	J
1	Network Imported Fuel	[Derived from application data]						[For HNES team use only]		
2		Baseline (annual)	Target (annual)	Apr-26	May-26	Jun-26	Data Source (Select)	Validation	Revised baseline	Revised target
3	Natural gas (kWh)									
4	Biofuel (kWh)									
5	Biomass (kWh)									
6	Electricity - national grid (kWh)									
7	Electricity - self-supply renewable (kWh)									
8	LPG (kWh)									
9	Solar thermal ((kWh)									
10	Waste heat (kWh)									
11	If Waste heat - what is the source of the waste heat									
12	Other fuel (kWh)									
13	If other fuel - description of fuel type									

- The project and contact details are the same as on the monthly forms
- Some new questions added in later rounds, but only rows with application data need to be filled in
- A new validation column has been added, along with revised additional baseline and target for use by HNES if a project change results in a change to the baseline figures





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Case Studies and Final Optimisation Reports

Louise Singleton, HNES Programme Manager

Downloading a document

Your case study template will be uploaded into your 'Documents' space. Select the tick box next to it and press download:

[← Back to Projects](#) **Documents** [+ Upload Document](#)

1 item selected [Clear selection](#) [Download](#)

☐	Document ID ↑↓	File Name ↑↓	Tag ↑↓	Uploaded At ↑↓	Uploaded By ↑↓	Actions
	Filter Document	Filter File Name	Filter Tag	Filter Uploaded At	Filter Uploaded By	
☐	HNES_MAIN_00926...	Final Optimisation Study tes...	Final Optimisation Reports	21 Apr 2026, 09:25	hnes@talan.com	
☒	HNES_MAIN_00926...	Case Study Capital Templat...	Case study	21 Apr 2026, 09:22	hnes@talan.com	
☐	HNES_MAIN_00926...	Grant Claim Form Annex S9...	Grant claim	20 Apr 2026, 14:53	hnes@talan.com	
☐	HNES_MAIN_00926...	Grant Claims Chaser.docx	Application	20 Apr 2026, 14:46	hnes@talan.com	
☐	HNES_MAIN_00926...	Test Grant Claim form.docx	Grant claim	20 Apr 2026, 14:42	hnes@talan.com	

Showing 1-5 of 5 results

[«](#) [<](#) Page 1 of 1 [>](#) [»](#)



Uploading a case study

Once you have completed the document, reupload it, selecting 'Case study' as your Document Category:

Create New Documents

Upload Project Document

Project REF: **HNES_MAIN_00926**

Upload supporting documents for your project. Maximum file size is 50MB per file.

Document Category

Application ▾

Application ✓

Clarifications

M&R

Case study

Grant claim

Final Optimisation Reports

Excel, PowerPoint, JPG/JPEG, PNG.

Create New Documents

Upload Project Document

Project REF: **HNES_MAIN_00926**

Upload supporting documents for your project. Maximum file size is 50MB per file.

Document Category

Case study ▾

Upload Documents

Choose File Case Study Capital Template v1.0.pdf

Supported formats: PDF, Word, Excel, PowerPoint, JPG/JPEG, PNG.

Case Study Capital Template v1.0.pdf

(0.78 MB) 🗑️

Cancel

📁 Upload Document



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Uploading the final optimisation reports

Under the Document Category dropdown, select 'Final Optimisation Reports' then choose your file to upload:

Create New Documents

Upload Project Document

Project REF: **HNES_MAIN_00926**

Upload supporting documents for your project. Maximum file size is 50MB per file.

Document Category

Application ▾

Application ✓

Clarifications

M&R

Case study

Grant claim

Final Optimisation Reports

Excel, PowerPoint, JPG/JPEG, PNG.

Create New Documents

Upload Project Document

Project REF: **HNES_MAIN_00926**

Upload supporting documents for your project. Maximum file size is 50MB per file.

Document Category

Final Optimisation Reports ▾

Upload Documents

Choose File Final Optimisation Study test document.docx

Supported formats: PDF, Word, Excel, PowerPoint, JPG/JPEG, PNG.

Final Optimisation Study test document.docx

(0.01 MB)



Cancel

Upload Document



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Filtering documents

Each file is tagged to its respective category and can be filtered using the 'Tag' column on the 'Documents' page

← Back to Projects **Documents**

Q Search all columns...

☐	Document ID ↑↓	File Name ↑↓	Tag ↑↓	Uploaded At ↑↓
	Q Filter Document ID	Q Filter File Name	Q Filter Tag	Q Filter Uploaded At
☐	HNES_MAIN_00926...	Final Optimisation Study tes	Final Optimisation Reports	21 Apr 2026, 09:25
☐	HNES_MAIN_00926...	Case Study Capital Templat..	Case study	21 Apr 2026, 09:22
☐	HNES_MAIN_00926...	Grant Claim Form Annex S9	Grant claim	20 Apr 2026, 14:53





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Any Questions?

Communications update

Gemserv, the Delivery Partner for HNES, has been acquired by Talan and is going through a rebrand.

What does this mean for HNES?

HNES communications have moved to the Talan brand and our email domains have changed from [@gemserv.com](mailto:info@gemserv.com) to [@talan.com](mailto:info@talan.com).



We have also launched a dedicated website for the scheme: hnes.uk

It has been developed to provide a clearer and more accessible home for information about the scheme. Previously, HNES resources were hosted on the Gemserv website.

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hnes@talan.com



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