



UK Government



HEAT NETWORK
EFFICIENCY SCHEME

HNES APPLICANT USER GUIDE

18 MAY 2026 – VERSION 3.0



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HNES APPLICANT USER GUIDE

1 PURPOSE OF THIS APPLICANT USER GUIDE

This user guide is designed to provide applicants with a comprehensive, step-by-step walkthrough of the HNES Application Platform. It supports users throughout the entire application lifecycle – from secure login and password recovery to viewing, editing, and submitting applications, uploading supporting documents, responding to clarification questions, uploading grant claim documents, case studies and final Optimisation Studies and submitting Monitoring and Reporting (M&R) returns.

The guide aims to:

- Ensure applicants can **securely access** the platform and recover credentials when needed.
- Help users **navigate and manage** their project applications effectively.
- Clarify the **differences between Draft, Submitted and Clarification Raised** application statuses, including what actions are permitted at each stage.
- Provide clear instructions for **editing application forms**, saving progress, and submitting completed applications.
- Explain how to **upload supporting documents** to draft applications and highlight restrictions for submitted ones.
- Outline how to **respond to clarification questions**, including how to resubmit an application.
- Explain how to upload documents and assign them to **Grant Claims, Case Studies or Final Optimisation Reports**.
- Explain how to **access and complete M&R returns**.
- Reinforce **security best practices** and collaboration guidelines to prevent data loss and ensure compliance with platform standards.

By following this guide, applicants will be equipped to confidently complete their applications, maintain data integrity, and meet submission and ongoing requirements within the Application Platform.

2 APPLICANT USER FUNCTIONS

2.1 APPLICANT LOGIN PROCESS

This guide provides step-by-step instructions to help applicants securely log into the HNES Application Platform, ensuring the protection of user credentials and identities. It also covers how to log out of the platform.

Log in with your valid credentials

You will have received an email from noreply@talansm.com with:

- Your Username
- Temporary Password and
- A URL link to access your account

From: Scheme Manager <noreply@talansm.com>
Sent: 31 July 2025 20:35
To: dummy_user@test.com
Subject: Your temporary password

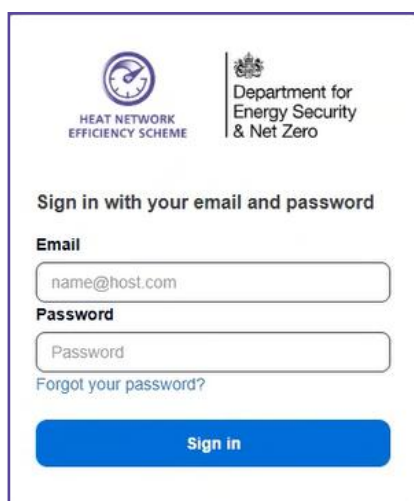
Your account has been created. Please find your login details below:

 **Username:** dummy_user@test.com
 **Temporary Password:** Xyz123!

To access your account, click the link below and follow the instructions to set your new password:

 <https://hnes.talansm.com>

Click on the URL link. This will open the login screen below; enter your username and temporary password and click on “**Sign in**”:



The login screen features the logos of the Heat Network Efficiency Scheme and the Department for Energy Security & Net Zero at the top. Below the logos, the text "Sign in with your email and password" is displayed. There are two input fields: "Email" with the placeholder "name@host.com" and "Password" with the placeholder "Password". A link "Forgot your password?" is located below the password field. At the bottom, there is a blue "Sign in" button.

Note: Temporary password links must be activated within 7 days of receipt. If not activated within this timeframe, a new request will be required for the Scheme Administrator to generate a new account.

The system will then request you to “**Change Password**” with security instructions. Enter your new password in both text boxes on the “**Change Password**” screen. Then click “**Send**”.



HEAT NETWORK
EFFICIENCY SCHEME



Department for
Energy Security
& Net Zero

Change Password

Please enter your new password below.

New Password

Enter New Password Again

✓ Password must contain a lower case letter

✓ Password must contain an upper case letter

✓ Password must contain a number

✓ Password must contain at least 8 characters

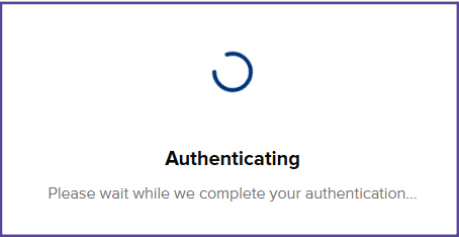
✓ Passwords must match

✓ Password must contain a special character or a space

✓ Password must not contain a leading or trailing space

Send

The system authenticates your credentials:



Upon successful authentication, you are redirected to your Projects **dashboard**.

Projects

M&R Reports

Projects

Projects

Search all columns...

Project Ref	Project Name	Funding Round	Status	Internal Status	Application Type	Organisation Type	Applicant Org	
☐	Filter Project	Filter Project Name	Filter Fundir	Filter Status	Filter Internal Status	Filter Applic	Filter Organisation T	Filter Appc
☐	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

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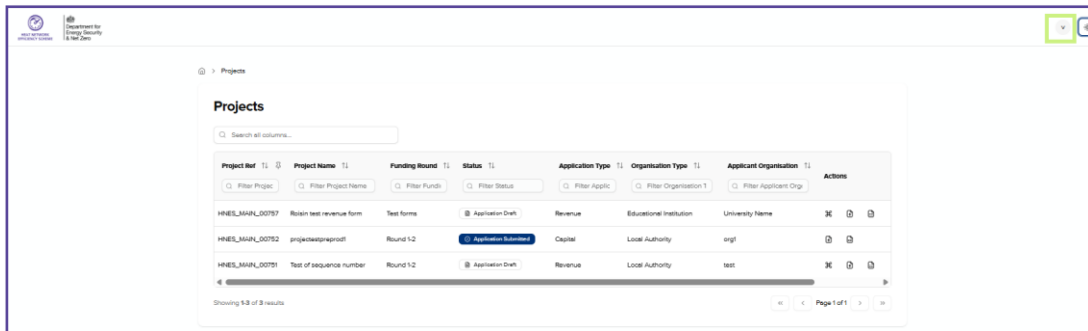
Page 1 of 1

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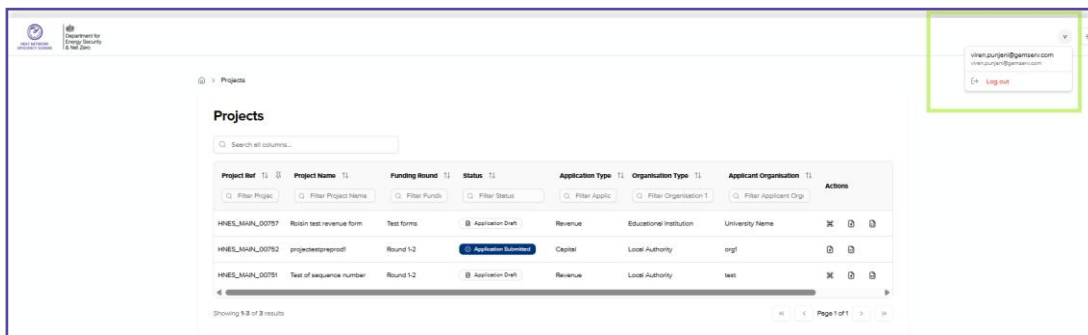
>>

Logout

To logout from your dashboard or at any screen, click on the “Down Arrow” button in the top right-hand corner.



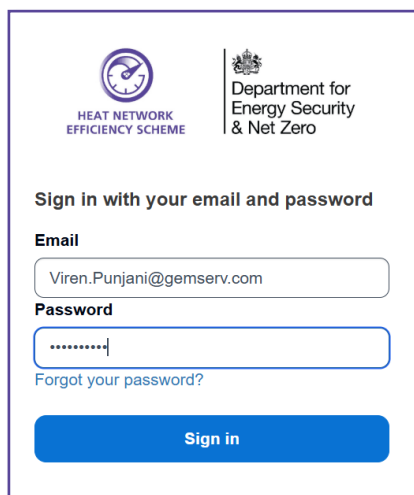
Click on “Log out”. This will log you out of the system.



2.2 APPLICANT LOGIN WITH INVALID CREDENTIALS

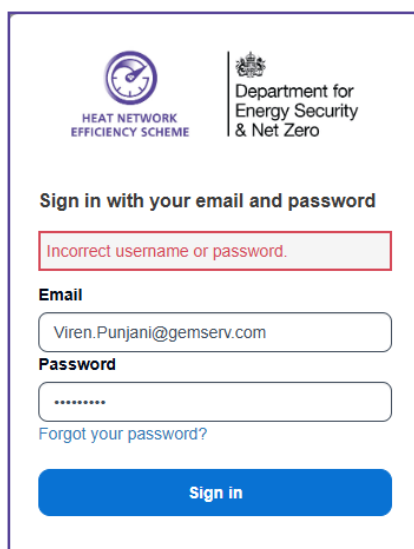
This section outlines the system's response when an applicant attempts to log in using invalid credentials. It demonstrates how authentication failures are handled and how error messages are displayed to inform the user of incorrect login details.

On the login page, if you enter **incorrect or invalid credentials** and click “**Sign in**”...



The screenshot shows the login page for the Heat Network Efficiency Scheme. At the top left is the logo for the Heat Network Efficiency Scheme, and at the top right is the logo for the Department for Energy Security & Net Zero. Below the logos, the text "Sign in with your email and password" is displayed. Underneath, there are two input fields: "Email" with the value "Viren.Punjani@gemserv.com" and "Password" with a masked value "*****". A link "Forgot your password?" is located below the password field. At the bottom is a blue button labeled "Sign in".

...the system will reject the login attempt. An **error message** will be displayed indicating that authentication has failed as “**Incorrect username or password**”.



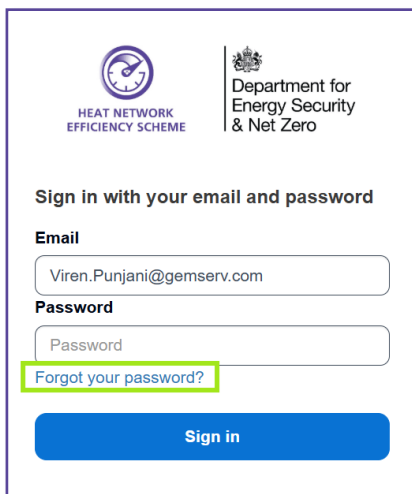
The screenshot shows the login page after an authentication failure. The "Email" and "Password" fields remain the same. A red-bordered box with the text "Incorrect username or password." is displayed above the "Email" field. The "Forgot your password?" link and the "Sign in" button are still present at the bottom.

Please check you are using the correct email address and password and that the Caps Lock key is off and try again.

2.3 FORGOTTEN PASSWORD AND RESET PASSWORD

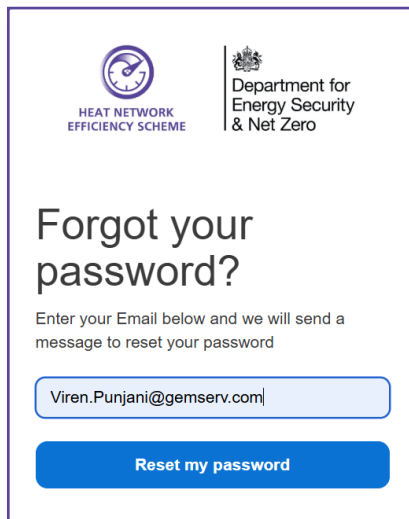
This section guides applicants through the process of recovering access to their account when they have forgotten their password. It outlines the steps for initiating a password reset, verifying identity via a reset code, and securely creating a new password. It also highlights the security measures in place, including AWS Cognito's compliance with industry standards for secure authentication and password management. Please note that this process applies solely to password resets. It does not apply to the initial account setup, where the applicant has not activated the account creation link within the 7-day expiry period to update the temporary password.

On the login page, click the **“Forgot your password?”** link.



The screenshot shows the login page for the Heat Network Efficiency Scheme. At the top left is the logo for the Heat Network Efficiency Scheme, and at the top right is the logo for the Department for Energy Security & Net Zero. Below the logos, the text "Sign in with your email and password" is displayed. Underneath, there are two input fields: "Email" with the value "Viren.Punjani@gemserv.com" and "Password" with the placeholder "Password". Below the password field, the link "Forgot your password?" is highlighted with a green box. At the bottom, there is a blue button labeled "Sign in".

Enter your registered email address and submit the request by clicking on **“Reset my password”**.



The screenshot shows the "Forgot your password?" page. At the top left is the logo for the Heat Network Efficiency Scheme, and at the top right is the logo for the Department for Energy Security & Net Zero. Below the logos, the heading "Forgot your password?" is displayed. Underneath, the text "Enter your Email below and we will send a message to reset your password" is shown. Below this text is an input field with the value "Viren.Punjani@gemserv.com". At the bottom, there is a blue button labeled "Reset my password".

The system will initiate the **Reset Password** process.

You will receive a **password reset code** via email from noreply@talansm.com:

From: Scheme Manager <noreply@talansm.com>
Sent: 03 August 2025 16:41
To: Viren Punjani <Viren.Punjani@gemserv.com>
Subject: Your verification code

Your password reset code is 111111

- Enter your password reset code in the Code box
- Enter a New Password that matches the security instructions
- Confirm the new password in the “Enter New Password Again” box
- Click on “**Change Password**”.



We have sent a password reset code by email to v***@g***. Enter it below to reset your password.

Code

New Password

Enter New Password Again

- ✓ Password must contain a lower case letter
- ✓ Password must contain an upper case letter
- ✓ Password must contain a number
- ✓ Password must contain at least 8 characters
- ✓ Passwords must match
- ✓ Password must contain a special character or a space
- ✓ Password must not contain a leading or trailing space

Change Password

Enter your email address and new password, then click “**Sign in**”.



Sign in with your email and password

Email

Password

[Forgot your password?](#)

Sign in

You are now logged into your Projects dashboard.

Projects

M&R Reports

Projects

Projects

Search all columns...

Project Ref	Project Name	Funding Round	Status	Internal Status	Application Type	Organisation Type	Applicant Org	
☐	Filter Project	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

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Page 1 of 1

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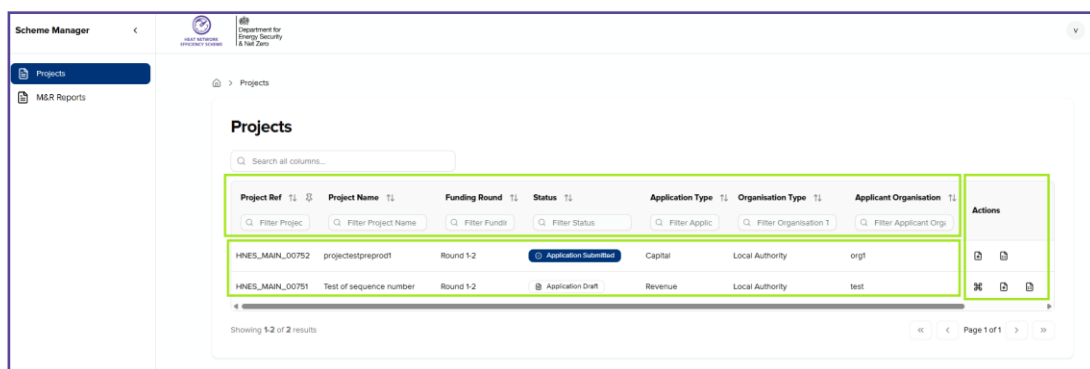
>>

Security Note:

- AWS Cognito ensures that all authentication processes are secure and compliant with industry standards.
- Passwords are never stored in plain text and are handled securely through Cognito’s identity management system.

2.4 APPLICANT PROJECTS VIEW

This section explains how applicants can view detailed information about their projects. It outlines the key data fields available and the actions that can be performed based on the application's current status. It also highlights restrictions on editing submitted applications.



Project Ref	Project Name	Funding Round	Status	Application Type	Organisation Type	Applicant Organisation	Actions
HNES_MAIN_00752	projectsteprodt	Round 1-2	Application Submitted	Capital	Local Authority	org1	[Edit] [Documents]
HNES_MAIN_00751	Test of sequence number	Round 1-2	Application Draft	Revenue	Local Authority	test	[Edit] [Documents]

Project Information Display:

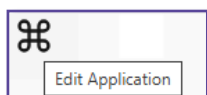
Applicants can view the following project details:

- **Project Reference** (e.g., HNES_MAIN_00751 / HNES_MAIN_00752)
- **Project Name**
- **Funding Round** (e.g., Round 10)
- **Application Status** (e.g., Application Draft / Application Submitted / Application Clarifications Raised)
- **Application Type** (Capital / Revenue)
- **Organisation Type** (e.g., Local Authority / Housing Association)
- **Applicant Organisation Name**

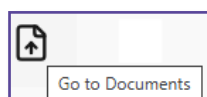
Available Actions:

Depending on the application's status, the following action buttons may be available in the Action area to the right of the Project dashboard:

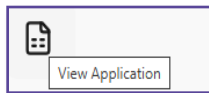
- **Edit Application**



- **Go to Documents**

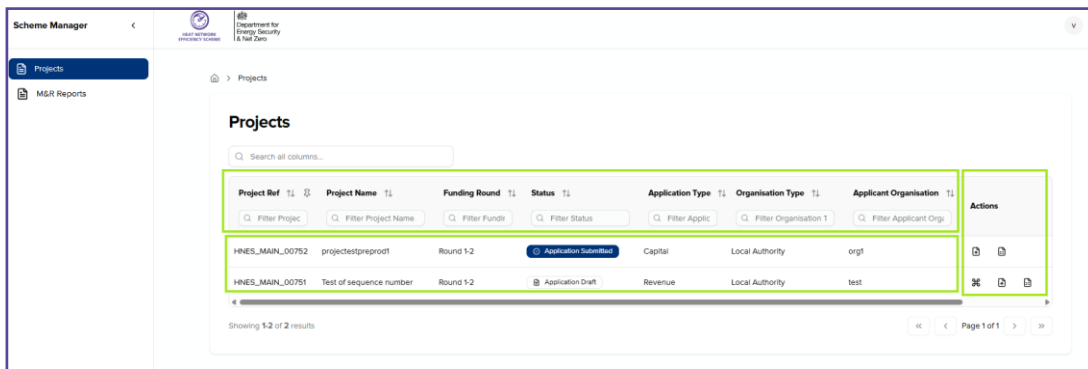


- **View Application**



Important Notes

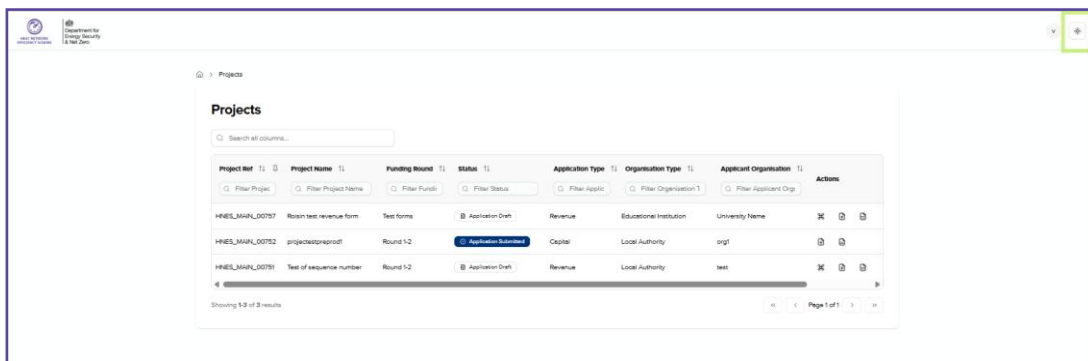
If the application status is **Submitted**, the **Edit Application** button will no longer be available in the Action area, and you will no longer be able to edit your application.



Light/Dark mode

The application starts in Light mode by default.

To switch modes, click on the “**Sun**” icon in the top-right corner of the page and then click on “**Dark**” mode.



The background will turn dark, and text will adjust to light colours for better contrast.

To switch back to Light mode, click on the “**Moon**” icon and click on “**Light**” mode.

Note:

The system remembers your last selected mode (Dark or Light) when you log out and will use the same mode when you log back in. If you choose “**System**” mode, the dashboard will align to the mode set as standard by the applicant’s computer system.

3 APPLYING FOR HNES FUNDING

3.1 EDIT AN APPLICATION FORM

This section provides guidance on how applicants can edit an application that is currently in **Draft** status. It outlines the steps for updating form sections, saving progress, and submitting the completed application, along with important notes on editing limitations.

Editing the Application

Click the **Edit Application** button for the application in **Draft** status:

Projects							
Q Search all columns...							
Project Ref	Project Name	Funding Round	Status	Application Type	Organisation Type	Applicant Organisation	Actions
Q Filter Project	Q Filter Project Name	Q Filter Fundi	Q Filter Status	Q Filter Applic	Q Filter Organisation T	Q Filter Applicant Orgi	
HNES_MAIN_00752	projectestpreprod1	Round 1-2	Application Submitted	Capital	Local Authority	org1	
HNES_MAIN_00751	Test of sequence number	Round 1-2	Application Draft	Revenue	Local Authority	test	   Edit Application
Showing 1-2 of 2 results							
« < Page 1 of 1 > »							

The application form (e.g., *HNES Revenue Application Form v7.0*) will open:



Department for
Energy Security
& Net Zero

Applications > Submit Form > HNES_MAIN_00751

HNES REV Application form data v7.01

HNES REV Application form data v7.01
HNES Revenue Application Form v7.01

Save Progress

A - Applicant info

Step 1 of 6

Section for A - Applicant info

Applicant Organisation Information

Applicant Ultimate Parent Company

Primary contact relating to application

Alternative contact relating to application

Local Authorities only - Section 151 Officer contact details

Previous

Next

You can save your progress and navigate freely between steps. Validation only occurs when you submit the form.

Expandable Sections: To view and answer the questions in each section (e.g., Applicant Organisation Information), click the **down arrow** on the right-hand side to expand a section and edit the relevant fields:

A - Applicant info Step 1 of 6

Section for A - Applicant info

Applicant Organisation Information

Mandatory Fields: All required fields are marked with an asterisk (*). You can freely navigate and edit the whole form without completing the mandatory fields in each section, however you will not be able to **Submit** the application until all mandatory fields have been completed correctly:

A - Applicant info Step 1 of 6

Section for A - Applicant info

Applicant Organisation Information

Full legal name of applicant (organisation or company) submitting the HNES funding application e.g. as appears on Companies House *

App Org Ltd

Type of organisation or company submitting the HNES funding application. *

Local Authority

If selecting "Other" please describe the organisation type

Enter text

[Non-Local Authority applicants only] UK company registration number or charity registration number. *

Enter text

This field is required

VAT Number (to be provided if VAT registered) *

Enter text

This field is required

Size of organisation *

Micro (0-9 employees)

Applicant address - line 1 *

Enter text

This field is required

Applicant address - line 2

You can update all sections of the form starting from **Section A** by using the **Next** and **Previous** buttons to navigate through the form.

HEAT NETWORK EFFICIENCY SCHEME

Department for Energy Security & Net Zero

Applications > Submit Form > HNES_MAIN_00751

HNES REV Application form data v7.01

HNES REV Application form data v7.01
HNES Revenue Application Form v7.01

Save Progress

A - Applicant info Step 1 of 6

Section for A - Applicant info

Applicant Organisation Information

Applicant Ultimate Parent Company

Primary contact relating to application

Alternative contact relating to application

Local Authorities only - Section 151 Officer contact details

Previous Next

You can save your progress and navigate freely between steps. Validation only occurs when you submit the form.

Save Progress: You can save your changes at any time by clicking the **Save Progress** button. When filling in the application form, you are advised to save your data at regular intervals.

HEAT NETWORK EFFICIENCY SCHEME

Department for Energy Security & Net Zero

Applications > Submit Form > HNES_MAIN_00751

HNES REV Application form data v7.01

HNES REV Application form data v7.01
HNES Revenue Application Form v7.01

Save Progress

A - Applicant info Step 1 of 6

Section for A - Applicant info

Applicant Organisation Information

Applicant Ultimate Parent Company

Primary contact relating to application

Alternative contact relating to application

Local Authorities only - Section 151 Officer contact details

Previous Next

You can save your progress and navigate freely between steps. Validation only occurs when you submit the form.

After saving, you may continue editing, return to the Project screen, log out, or close your browser without losing any entered data.

When you log back in later, the application form will retain all previously saved responses, allowing you to seamlessly continue from where you left off.

Editing Restrictions

- Applications in **Draft** and **Clarifications Raised** statuses **can be edited**.
- Applications in **Submitted** status **cannot be edited**.
- Applications can only be edited by one person at a time. Refer to Section 3.2 for further detail.

Application Section List that should be completed:

- Section A – Applicant Information

The screenshot displays the 'HNES REV Application form data v7.01' interface. At the top, the header includes the 'HEAT NETWORK EFFICIENCY SCHEME' logo and the 'Department for Energy Security & Net Zero'. A breadcrumb trail shows 'Applications > Submit Form > HNES_MAIN_00751'. The main title is 'HNES REV Application form data v7.01'. Below this, a sub-header reads 'HNES REV Application form data v7.01' followed by 'HNES Revenue Application Form v7.01'. A 'Save Progress' button is located in the top right corner. The section is titled 'A - Applicant info' and is marked as 'Step 1 of 6'. The content area is labeled 'Section for A - Applicant info' and contains five expandable sections: 'Applicant Organisation Information', 'Applicant Ultimate Parent Company', 'Primary contact relating to application', 'Alternative contact relating to application', and 'Local Authorities only - Section 151 Officer contact details'. Each section has a downward arrow icon. At the bottom left is a 'Previous' button, and at the bottom right is a 'Next' button. A footer note states: 'You can save your progress and navigate freely between steps. Validation only occurs when you submit the form.'

- Section B – Project Information

The screenshot shows the 'HNES REV Application form data v7.01' interface for 'Step 2 of 6: B - Project Info'. The breadcrumb trail is 'Applications > Submit Form > HNES_MAIN_00751'. The form title is 'HNES REV Application form data v7.01' with the subtitle 'HNES Revenue Application Form v7.01'. A 'Save Progress' button is in the top right. The section is titled 'Section for B - Project info'. It contains four expandable sections: 'Heat Network Details', 'Address of the network energy centre', 'Network Characteristics', and 'Regulatory'. At the bottom, there are 'Previous' and 'Next' buttons. A note at the bottom states: 'You can save your progress and navigate freely between steps. Validation only occurs when you submit the form.'

- Section C – Project Narrative

The screenshot shows the 'HNES REV Application form data v7.01' interface for 'Step 3 of 6: C - Project narrative'. The breadcrumb trail is 'Applications > Submit Form > HNES_MAIN_00751'. The form title is 'HNES REV Application form data v7.01' with the subtitle 'HNES Revenue Application Form v7.01'. A 'Save Progress' button is in the top right. The section is titled 'Section for C - Project narrative'. It contains two expandable sections: 'Narrative Text' and 'Sub-Optimal Performance'. At the bottom, there are 'Previous' and 'Next' buttons. A note at the bottom states: 'You can save your progress and navigate freely between steps. Validation only occurs when you submit the form.'

- Section D – Baseline (Revenue form) or Baseline and Targets (Capital form)

HEAT NETWORK EFFICIENCY SCHEME | Department for Energy Security & Net Zero

Applications > Submit Form > HNES_MAIN_00751

HNES REV Application form data v7.01

HNES Revenue Application Form v7.01

Save Progress

D - Baseline

Step 4 of 6

Section for D - Baseline

Where available, applicants should provide quantified information outlining current network performance against the indicators below.

- Network Imported Fuel
- Network Energy Generation
- Economic Indicators
- Heat Demands and Losses - District Heating
- District heating secondary pipework system
- Heat Demands and Losses - Communal Heating
- Network Outages / Service Interruptions

Previous Next

You can save your progress and navigate freely between steps. Validation only occurs when you submit the form.

- Section E – Funding and Procurement

HEAT NETWORK EFFICIENCY SCHEME | Department for Energy Security & Net Zero

Applications > Submit Form > HNES_MAIN_00751

HNES REV Application form data v7.01

HNES Revenue Application Form v7.01

Save Progress

E - Funding and procurement

Step 5 of 6

Section for E - Funding and procurement

- Funding
- Procurement

Previous Next

You can save your progress and navigate freely between steps. Validation only occurs when you submit the form.

- Section F – Confirmations

HEAT NETWORK EFFICIENCY SCHEME | Department for Energy Security & Net Zero

Applications > Submit Form > HNES_MAIN_00751

HNES REV Application form data v7.01

HNES Revenue Application Form v7.01

Save Progress

F - Confirmations

Step 6 of 6

Section for F - Confirmations

- Confirmations
- Declaration

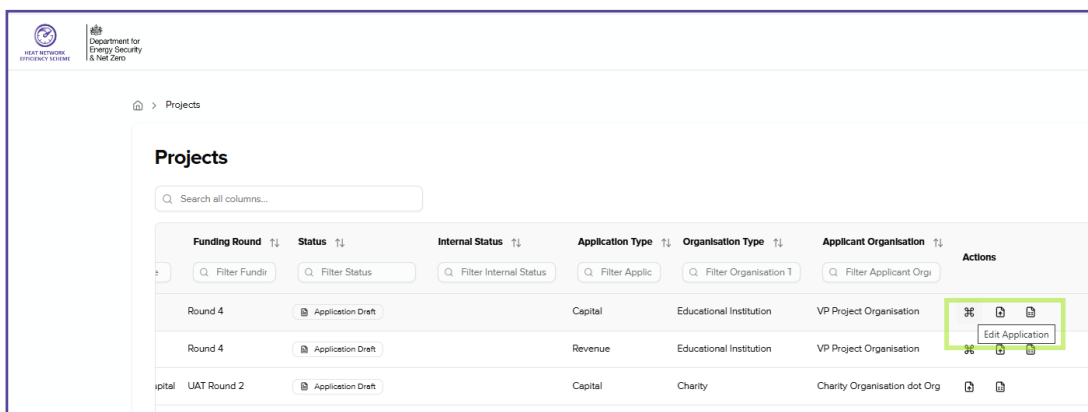
Previous Submit

You can save your progress and navigate freely between steps. Validation only occurs when you submit the form.

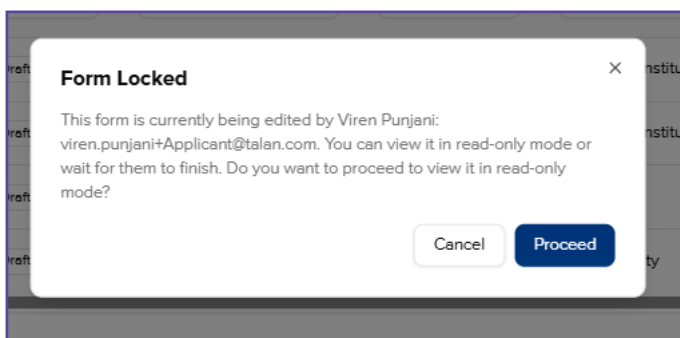
3.2 PREVENT CONCURRENT EDITING OF APPLICATION FORMS

This section outlines the system's behaviour when multiple applicants attempt to update the same application simultaneously. It ensures data integrity and prevents conflicting changes by allowing only one applicant to edit the application at a time. If another applicant is already making updates, the system will restrict access to read-only mode for others and display a notification indicating that the application is currently being edited.

If you are the first applicant to log in and click the “Edit Application” button, the system will grant you access to update the application form. During this time, other applicants will be restricted from making edits and will only be able to view the application in read-only mode.



If you log in while another applicant is actively editing the application, you will only be able to view the form in read-only mode. The system will restrict editing access to ensure that only one applicant can make changes at a time. If you click on “**Edit Application**” when another user is already editing the application form, the **Form Locked** dialog message box appears: “This form is currently being edited by [First Name Second Name]: [xxx@yyy.com](#). You can view it in read-only mode or wait for them to finish. Do you want to proceed to view it in read-only mode?”



Click **Cancel** to return to the Project Dashboard or click **Proceed** to view the application in read-only mode.

In read-only view, you will be able to see the latest saved version of the application form along with the name of the applicant who is actively editing it.



Department for
Energy Security
& Net Zero

Applications > HNES_MAIN_00863

← Application Summary

APPLICATION_DRAFT

HNES Capital Application Form v9.0
This application form is for Capital application submissions to the Heat Network Efficiency Scheme

 Read-Only Mode

Currently being edited by Viren Purjani: viren.purjani+Applicant@talan.com

You can view this form but cannot make changes.

The form will automatically become editable when the current editor finishes or their session expires.

 Applicant: viren.purjani+Applicant@talan.com

 Created: 6 Sept 2025, 17:02

 Updated: 6 Sept 2025, 17:02

Information for Applicants

Section A - Applicant Information
Please enter details in this section relating to the organisation and contact details

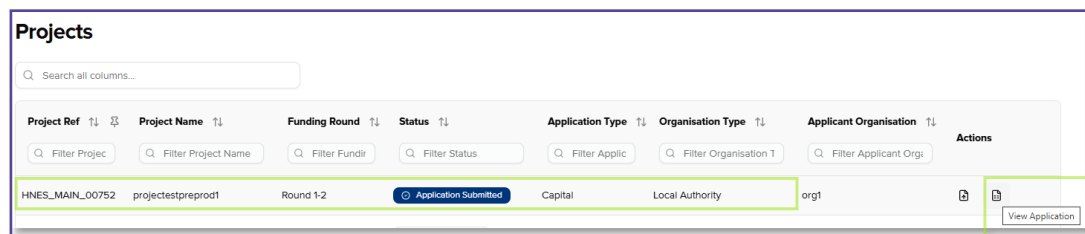
Applicant Organisation Information

Full legal name of applicant (organisation or company) submitting the HNES funding application e.g. as appears on Companies House
VP Project Organisation

3.3 VIEW APPLICATION FORM

This section describes how applicants can view the summary of their application forms. This function is available regardless of the application status.

From the Projects dashboard, click the **View Application** button for the relevant application.

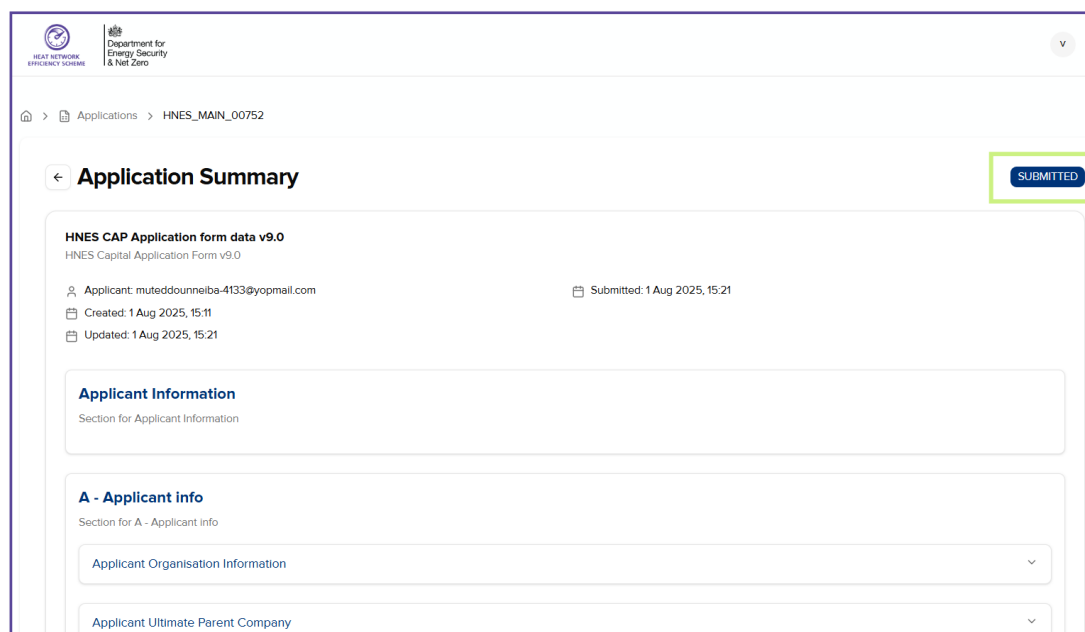


The screenshot shows a table titled 'Projects' with a search bar and several filter buttons. The table has columns for Project Ref, Project Name, Funding Round, Status, Application Type, Organisation Type, Applicant Organisation, and Actions. One row is highlighted, showing 'HNES_MAIN_00752', 'projecttestpreprod1', 'Round 1-2', 'Application Submitted', 'Capital', 'Local Authority', and 'org1'. In the Actions column for this row, a 'View Application' button is highlighted with a green box.

Project Ref	Project Name	Funding Round	Status	Application Type	Organisation Type	Applicant Organisation	Actions
HNES_MAIN_00752	projecttestpreprod1	Round 1-2	Application Submitted	Capital	Local Authority	org1	View Application

The system will display the application summary with its current status:

If the application is **Submitted**, the summary will show the **SUBMITTED** status:



The screenshot shows the 'Application Summary' page for application 'HNES_MAIN_00752'. The page title is 'Application Summary' and the status is 'SUBMITTED'. The page displays the 'HNES CAP Application form data v9.0' and the 'Applicant Information' section. The 'Applicant Information' section includes the applicant's name, email, and submission date. Below this, there are two sections: 'A - Applicant info' and 'Applicant Organisation Information'. The 'Applicant Organisation Information' section is currently empty.

Application Summary SUBMITTED

HNES CAP Application form data v9.0
HNES Capital Application Form v9.0

Applicant: muteddownneiba-4133@yopmail.com Submitted: 1 Aug 2025, 15:21
Created: 1 Aug 2025, 15:11
Updated: 1 Aug 2025, 15:21

Applicant Information
Section for Applicant Information

A - Applicant info
Section for A - Applicant info

Applicant Organisation Information

Applicant Ultimate Parent Company

If the application is in **Draft**, the summary will show the **DRAFT** status.

Projects

Project Ref	Project Name	Funding Round	Status	Application Type	Organisation Type	Applicant Organisation	Actions
Filter Project	Filter Project Name	Filter Fundnr	Filter Status	Filter Applic	Filter Organisation T	Filter Applicant Orgi	
HNES_MAIN_00752	projectstepprod1	Round 1-2	Application Submitted	Capital	Local Authority	org1	
HNES_MAIN_00751	Test of sequence number	Round 1-2	Application Draft	Revenue	Local Authority	test	View Application

Showing 1-2 of 2 results

Page 1 of 1



[Home](#) > [Applications](#) > HNES_MAIN_00751

←

Application Summary

DRAFT

HNES REV Application form data v7.01
HNES Revenue Application Form v7.01

 Applicant:

 Created: 31 Jul 2025, 13:05

 Updated: 3 Aug 2025, 17:03

A - Applicant info
Section for A - Applicant info

Applicant Organisation Information

Applicant website
Not provided

Size of organisation
Micro (0-9 employees)

VAT Number (to be provided if VAT registered)
Not provided

Applicant address - city
Not provided

Applicant address - county
Not provided

Applicant address - line 1
Not provided

The Application Summary only appears if data has been entered and saved into the application form. If no data has been saved, the following screen will appear when the View Application button is clicked:

Application not found or you don't have permission to access it.

[Back to projects](#)

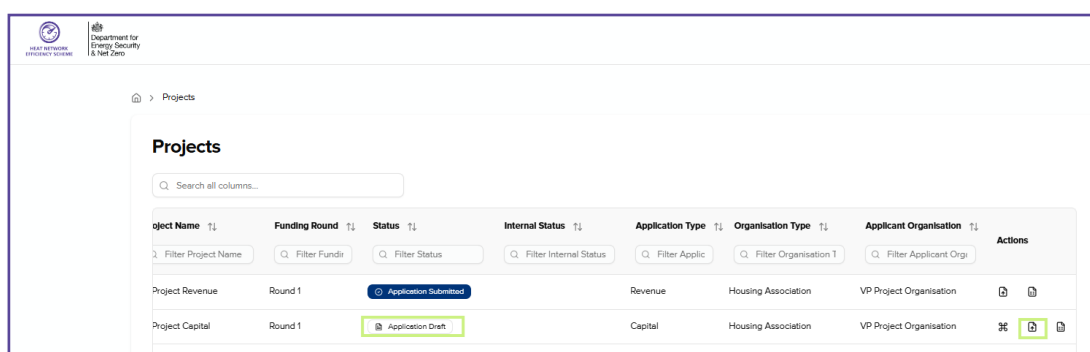
3.4 UPLOAD APPLICATION SUPPORTING DOCUMENTS

This section explains how applicants can upload supporting documents to an application that is in **Draft** or **Clarifications Raised** status. It outlines the upload process, file size limitations, and restrictions for submitted applications.

Access the Document Upload Area

Navigate to your project application in **Draft** status.

Click the **“Go to Documents”** button associated with the application to open the Documents dashboard:

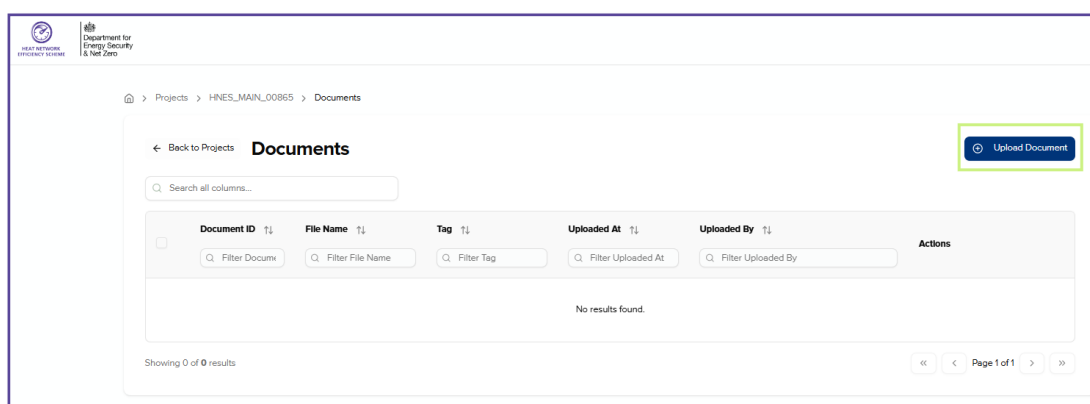


The screenshot shows the 'Projects' dashboard with a search bar and a table of applications. The table has columns: Project Name, Funding Round, Status, Internal Status, Application Type, Organisation Type, Applicant Organisation, and Actions. Two rows are visible: 'Project Revenue' with status 'Application Submitted' and 'Project Capital' with status 'Application Draft' (highlighted with a green box).

Project Name	Funding Round	Status	Internal Status	Application Type	Organisation Type	Applicant Organisation	Actions
Project Revenue	Round 1	Application Submitted		Revenue	Housing Association	VP Project Organisation	[Icon] [Icon]
Project Capital	Round 1	Application Draft		Capital	Housing Association	VP Project Organisation	% [Icon] [Icon]

Initiate the Upload Process

On the Documents Dashboard, click the **“Upload Document”** button to begin uploading a file:



The screenshot shows the 'Documents' dashboard for project HNES_MAIN_00865. It includes a 'Back to Projects' link, a search bar, and a table with columns: Document ID, File Name, Tag, Uploaded At, Uploaded By, and Actions. The table is currently empty, showing 'No results found.' The 'Upload Document' button is highlighted with a green box.

Document ID	File Name	Tag	Uploaded At	Uploaded By	Actions
No results found.					

The following screen will appear:

Back to Projects Documents

Search all columns...

Create New Documents

Upload Project Document

Project REF: HNES_MAIN_01051

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

Document Category

Application

Upload Document

Choose File No file chosen

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

Cancel Upload Document

Notes:

- Supported file types are PDF, Word, Excel, PowerPoint, JPG/JPEG, PNG (See above screen “Choose files...”). ZIP files are not supported.
- The maximum upload size allowed per file is **50MB**.
- If a file exceeds this limit, an error message will appear in **Red**: “[Filename] File size exceeds the 50MB limit.”

Upload Files

Using the Document Category drop down, select **Application**.

Click the “**Choose File**” area (labelled “No file chosen”) to open the file selection dialog. Navigate to the file you wish to upload and select it. Click the “**Open**” button:

Name	Status	Date modified	Type	Size
HNES Final Evidence	✓	25/06/2025 16:07	Microsoft Word Doc...	27 KB
HNES R10 Evidence 2	✓	18/07/2025 15:59	Microsoft Word Doc...	29,990 KB
HNES R10 Evidence	✓	21/05/2025 12:15	Microsoft Edge PDF ...	5,477 KB
HNES REV Application form data_v6.0	✓	22/04/2025 13:23	Microsoft Excel Work...	189 KB
HNES REV Application form data_v6.01	✓	22/04/2025 13:23	Microsoft Excel Work...	189 KB
HNES-guidance	✓	21/05/2025 12:17	Microsoft Edge PDF ...	30,347 KB

Search: HNES R10 Evidence

All Files

Open Cancel

To complete the upload process, click on the “**Upload Document**” button:

Back to Projects Documents

Create New Document

Upload Project Document

Project REF: **HNES_MAIN_00865**

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

Document Category

Application

Upload Document

Choose file HNES R10 Evidence.pdf

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

HNES R10 Evidence.pdf (5.35 MB)

Cancel Upload Document

The document is now listed in the Documents area with the tag “Application” supporting evidence.

Warning:

You cannot upload two documents with the same file name. If you attempt to do this, the system will prevent the upload due to version duplication. The following error will be displayed: “The file name you’re trying to upload already exists. Please update the file name and reupload. [Filename]”.

Document ID	File Name	Tag	Uploaded At	Uploaded By	Actions
HNES_MAIN_00865...	HNES R10 Evidence.pdf	APPLICATION	14 Sept 2025, 19:30	viren.punjani+Applicant@talan.com	
HNES_MAIN_00865...	green-heat-network-fund-sc...	APPLICATION	10 Sept 2025, 09:32	viren.punjani+Applicant@talan.com	

Showing 1-2 of 2 results

Back to Projects Documents

Create New Document

Upload Project Document

Project REF: **HNES_MAIN_00757**

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

Document Category

Application

Upload Document

Choose files SMP_User_Guide_Complete.docx

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

Selected files (1):

SMP_User_Guide_Complete.docx (0.03 MB)

Clear All

Cancel Upload 1 Document

The file name you're trying to upload already exists. Please update the file name and reupload. SMP_User_Guide_Complete.docx

To successfully upload, you will need to update the file name (e.g. by adding a date or version number) and repeat the Upload Document steps above.

If you want to replace a document but do not wish to change the file name, you must first delete the original document (see Section 3.5). This ensures the system treats the new upload as a fresh entry.

By deleting the original file first, the system will not flag the new upload as a duplicate.

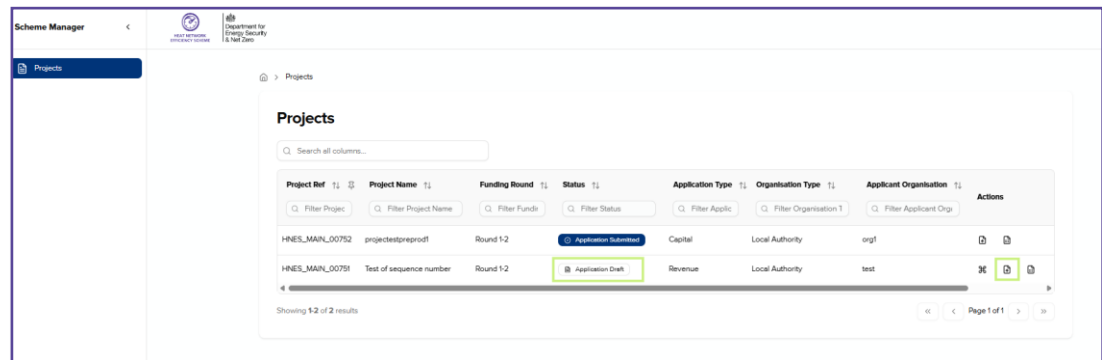
3.5 DELETE A DOCUMENT

This section explains how applicants can delete supporting documents that are already uploaded to an application. It outlines the delete process, and restrictions for deleting documents. It highlights the distinction between documents uploaded by an applicant and those uploaded by the Scheme Administrator, emphasising that applicants can only delete their own documents.

Access the Document Upload Area

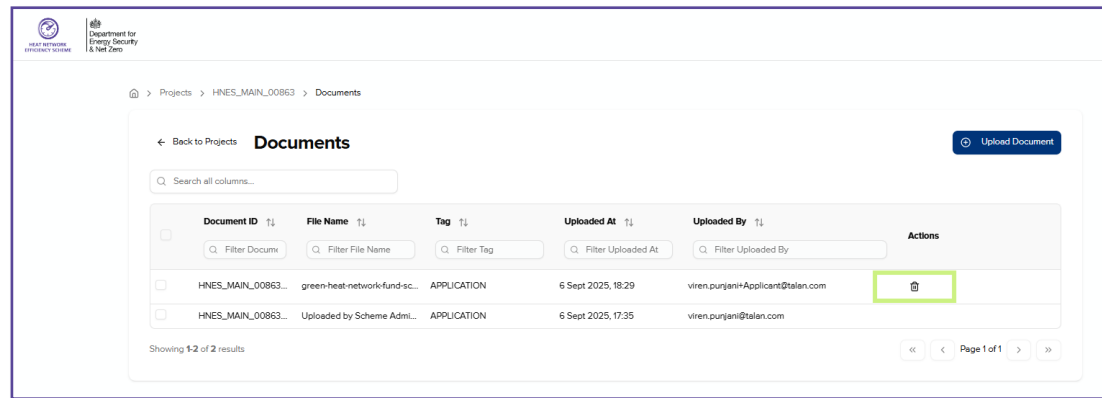
Navigate to your project application in **Draft** or **Clarifications Raised** status.

Click the **“Go to Documents”** button associated with the application to open the Documents dashboard:



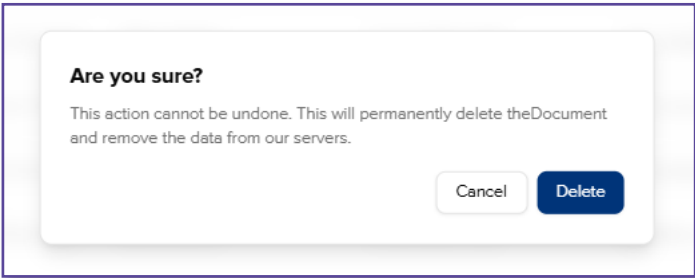
The ‘Uploaded By’ column shows who has uploaded each document. Applicants can only delete documents uploaded by an applicant user (be that yourself or a colleague). Documents uploaded by another user type, e.g. a Scheme Administrator user, cannot be deleted.

You will see a **Delete** button in the Actions area which is visible for each document that you are able to delete. Documents uploaded by a different user type, e.g. Scheme Administrator, do not have a Delete button visible:

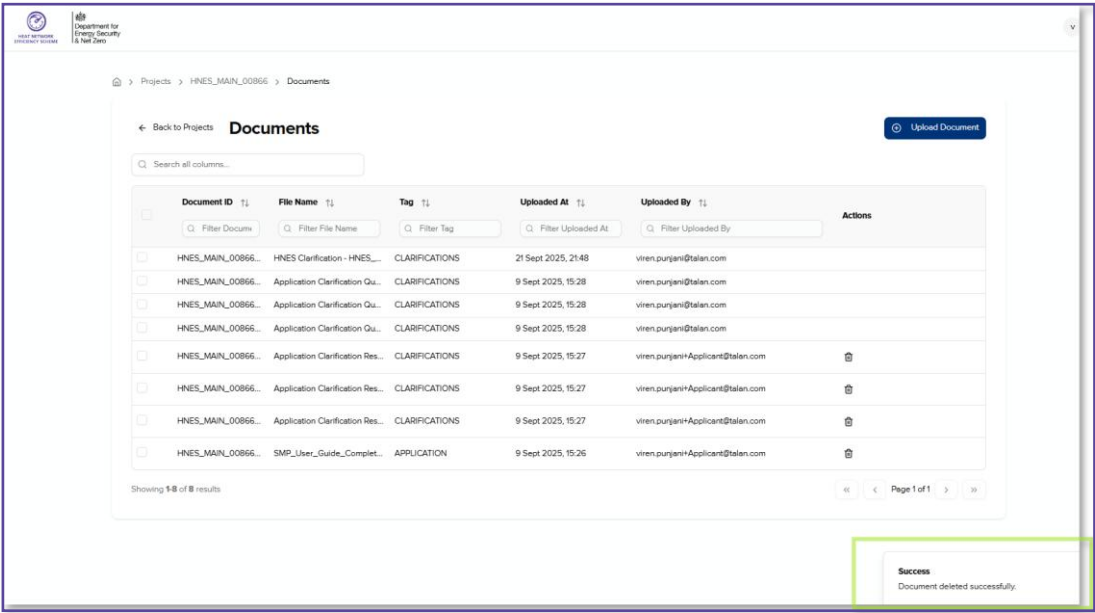


Click on the **“Delete”** button for the file you want to delete permanently.

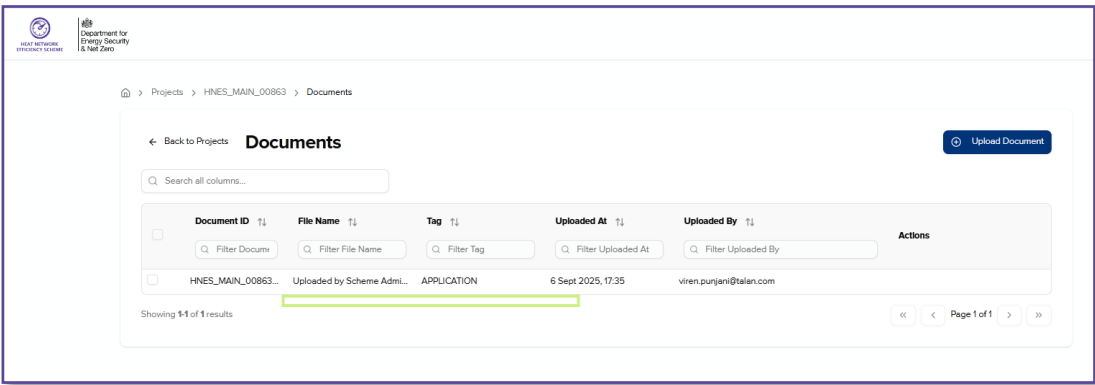
An “Are you sure?” warning message will appear to confirm the Delete action. To stop deleting the document, click “**Cancel**”. To complete the deletion, click “**Delete**”:



The file is now deleted and a “Success – Document deleted successfully” message appears at the bottom right of the screen.



The document is now removed from the Documents section:



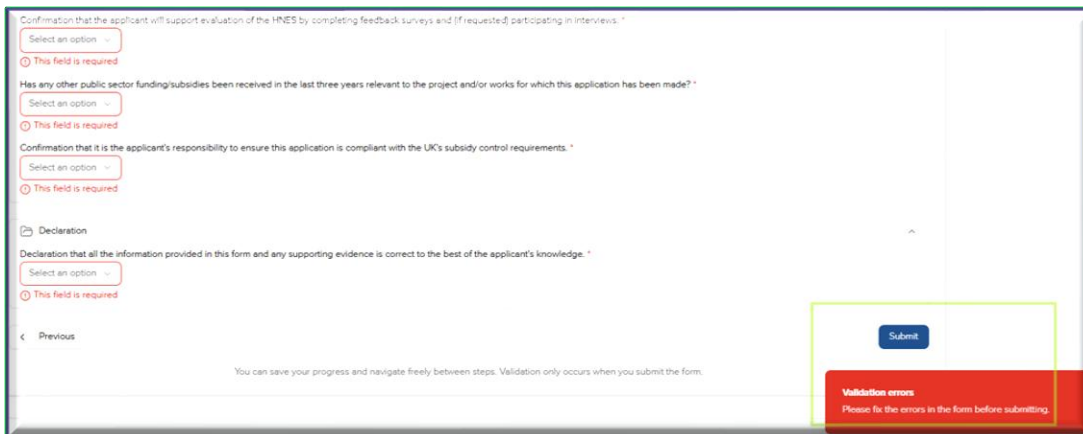
3.6 SUBMIT AN APPLICATION

This section explains how applicants can submit an application. It also outlines the restrictions for editing the application form and supporting documents once an application has been submitted.

Application Submission

Before submitting your application, make sure you have completed ALL mandatory fields (marked with an *****) in the application form.

If you do not fill ALL mandatory fields of the application and attempt to submit, then the system will display a Validation Error and will request you to fill any missing data (as marked in red below):



The screenshot shows a web form with several sections. Each section has a dropdown menu and a red error message: "This field is required". The sections are:

- Confirmation that the applicant will support evaluation of the HNES by completing feedback surveys and (if requested) participating in interviews. *
- Has any other public sector funding/subsidies been received in the last three years relevant to the project and/or works for which this application has been made? *
- Confirmation that it is the applicant's responsibility to ensure this application is compliant with the UK's subsidy control requirements. *
- Declaration

At the bottom right, there is a red box with the text: "Validation errors. Please fix the errors in the form before submitting." A "Submit" button is visible above this box. A "Previous" button is visible at the bottom left. A note at the bottom states: "You can save your progress and navigate freely between steps. Validation only occurs when you submit the form."

You must also make sure you have uploaded all necessary supporting documents, as you will no longer be able to upload documents once the application has been submitted.

Once all documents have been uploaded and all required information has been completed and reviewed, go to the Confirm Form Completed section and enter “Confirm” to confirm you are ready to submit the application. Then click on “**Submit**” to finalise the application submission process:

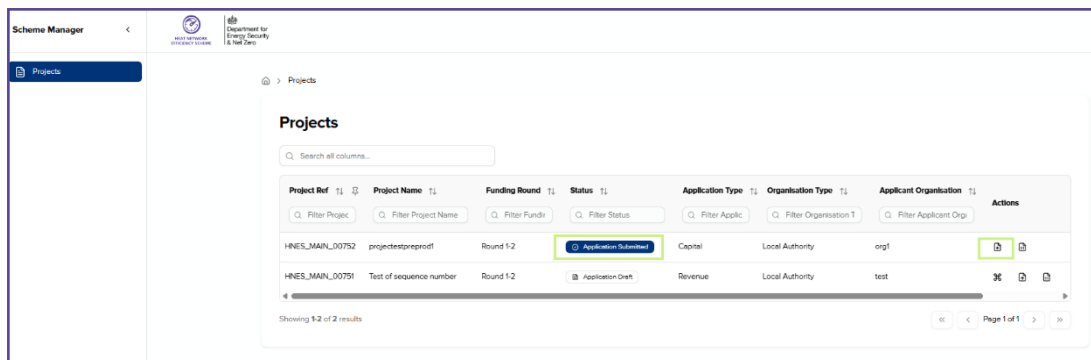
The “Form submitted successfully” message will appear at the bottom right of the screen:

Warning:

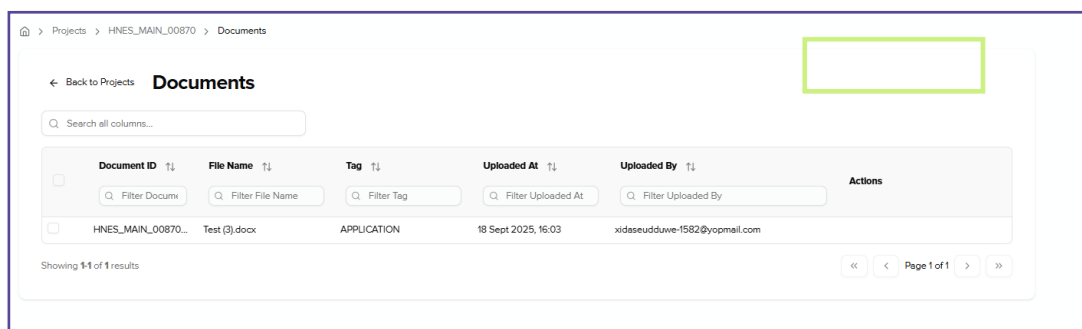
After submission, the application becomes **read-only** and can no longer be edited.

Restrictions for Submitted Applications

Once an application is in the **Submitted** status, the Edit Application button is no longer visible as the application cannot be edited.



Document uploads are also **disabled**. If you click the **Go to Documents** button on a submitted application, you will be able to see the documents that have already been uploaded but the **Upload Document** button is no longer visible:



You must therefore ensure all the relevant documents are uploaded before pressing submit in the application form.

Important Information:

- Application forms will automatically be locked once the Funding Round deadline has passed. Please make sure you have completed all of the application questions, uploaded all your supporting documents and pressed submit before the Funding Round closes. Applications that have not been submitted by this date **will not be assessed**.
- If you experience any issues with completing your application form, please email hnes@talan.com and one of our team will be able to help you.

3.7 APPLICATION STAGES AND STATUS VIEW

This section provides applicants with a comprehensive overview of the various status updates that occur throughout the lifecycle of a project – from initial application submission to final project completion. It outlines the meaning and implications of each status, ensuring applicants understand when actions are required, what decisions have been made, and how their project is progressing. By offering full visibility into each stage, this section supports transparency, informed decision-making, and timely responses during the application, Assessment and Award process.

As an applicant, you will have full visibility of all project statuses throughout the lifecycle – from the initial application stage through to project completion.

Application Draft
Application Submitted
Application Under Assessment
Application Clarification Raised
Project Withdrawn Pre Funding Award
Project Not Awarded Funding
Project Awarded Full Funding
Project Awarded Full Funding With Conditions
Project Awarded Partial Funding
Project Awarded Partial Funding With Conditions
Project Withdrawn Post Funding Award
Project Commissioned
Project Complete

- **Application Stage Status**

The application will display an **Application Draft** status while you are actively updating the form. Once the application is submitted, the status will automatically change to **Application Submitted**. You will be unable to make changes to the application form or upload any documents when the Application Submitted status is in place.

- **Assessment Stage Status**

After the submission deadline has passed and the application is under review, the status will update to **Application Under Assessment**, indicating that the evaluation process is in progress.

- **Clarification Stage Status**

If further information or clarification is requested during the assessment, the status will change to **Application Clarification Raised**. This status will be visible to you and indicates that action is required.

Note: When your application status is set to **Clarification Raised**, you will be able to reopen the application to make necessary updates and upload additional supporting documents.

- **Withdrawal Prior to Award Decision**

If an application is submitted but then withdrawn at any stage before the Grant Funding documentation is signed, the Scheme Administrator will update the status to **Project Withdrawn Pre-Funding Award**.

- **Project Award Decision Stage Status**

Once the funding outcome decisions are announced, the Scheme Administrator will update the project status to reflect the funding decision. As an applicant, you will be able to view one of the following statuses:

- **Project Not Awarded Funding:** Your application was not successful.
- **Project Awarded Full Funding:** Your project has been approved for full funding.
- **Project Awarded Full Funding With Conditions:** Full funding has been awarded, subject to specific conditions. These will be detailed in your funding award letter and grant funding documentation.
- **Project Awarded Partial Funding:** Your project has been approved for partial funding.
- **Project Awarded Partial Funding With Conditions:** Partial funding has been awarded, subject to specific conditions. These will be detailed in your funding award letter and grant funding documentation.

- **Project Withdrawn Post Funding Award**

If you decide to withdraw a project after the Grant Funding documentation has been signed, the Scheme Administrator will update the status to **Project Withdrawn Post Funding Award**.

- **Commissioning Stage Status**

The status is for capital projects only. The Scheme Administrator will use the information provided in your monthly Monitoring and Reporting (M&R) returns to determine when your funded measures have been commissioned and update the project status to **Project Commissioned**. Projects with this status will only be required to submit M&R returns quarterly.

- **Project Completion Stage Status**

Upon successful completion of the project, the Scheme Administrator will update the status to **Project Complete**, marking the end of the project lifecycle. For revenue projects, this will be when the Optimisation Study report, Techno-economic Analysis and summary M&R tab have been submitted and approved. For capital projects, this will be two years after the project commissioning date. Projects marked as **Project Complete** will no longer need to submit M&R returns.

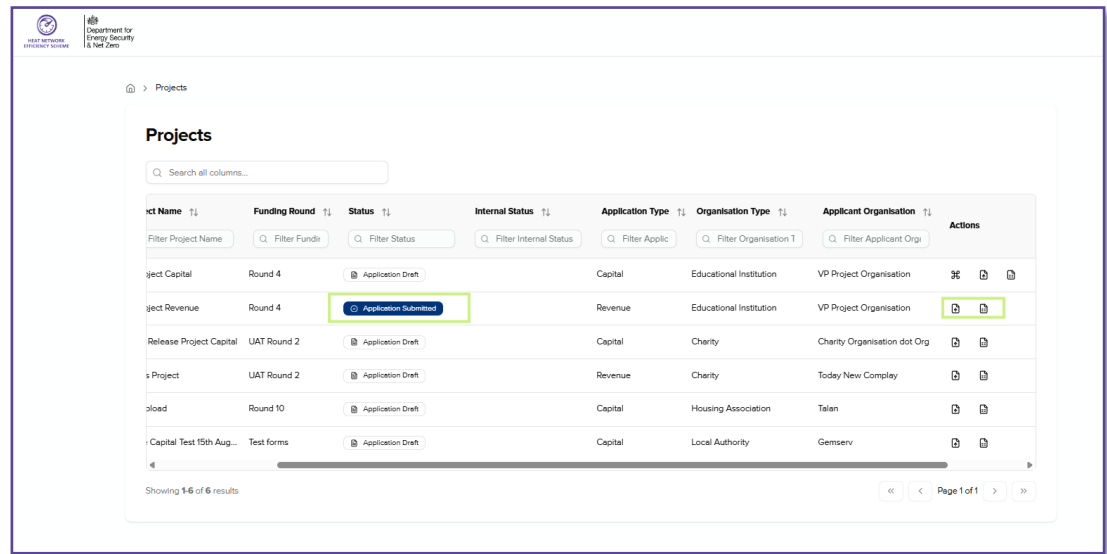
See examples below of different statuses relating to projects:

Project Ref	Project Name	Funding Round	Status	Internal Status	Application Type	Organisation Type	Applicant Org
HNES_MAIN_00866	VP Project Revenue	Round 1	Application Submitted		Revenue	Housing Association	VP Project Orga
HNES_MAIN_00865	VP Project Capital	Round 1	Application Draft		Capital	Housing Association	VP Project Orga
HNES_MAIN_00863	VP Project Capital	Round 4	Application Under Assess...		Capital	Educational Institution	VP Project Orga
HNES_MAIN_00862	VP Project Revenue	Round 4	Application Clarification Re...		Revenue	Educational Institution	VP Project Orga
HNES_MAIN_00828	MVP2 Release Project Capital	UAT Round 2	Project Withdrawn Pre Fun...		Capital	Charity	Charity Organis
HNES_MAIN_00790	Todays Project	UAT Round 2	Project Awarded Full Fundi...		Revenue	Charity	Today New Con
HNES_MAIN_00786	Test upload	Round 10	Project Not Awarded Fundi...		Capital	Housing Association	Talan
HNES_MAIN_00773	Louise Capital Test 15th Aug...	Test forms	Project Withdrawn Post Fu...		Capital	Local Authority	Gemserv

3.8 RESPONDING TO CLARIFICATIONS RAISED

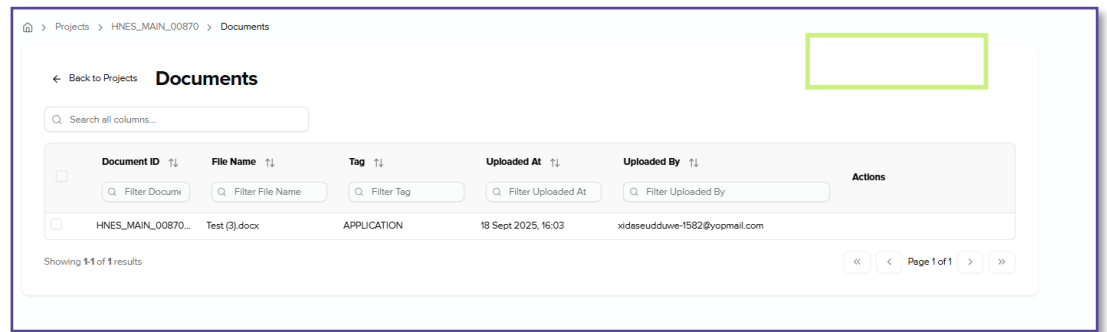
This section explains the system behaviour when an application enters the Clarification Raised status during the assessment review process. This status indicates that further information is required by the assessors. Your application form has been reopened and you are able to edit it to address the query. Additionally, the document upload functionality is re-enabled, allowing you to submit supporting documents relevant to the clarification request. This ensures that applicants can respond effectively and promptly to queries raised during the assessment phase.

Once an application is submitted, the status changes to Application Submitted and the Edit Application button (✎) disappears. You are now unable to update your application.



Project Name	Funding Round	Status	Internal Status	Application Type	Organisation Type	Applicant Organisation	Actions
Project Capital	Round 4	Application Draft		Capital	Educational Institution	VP Project Organisation	✎ 📄 📄
Project Revenue	Round 4	Application Submitted		Revenue	Educational Institution	VP Project Organisation	📄 📄
Release Project Capital	UAT Round 2	Application Draft		Capital	Charity	Charity Organisation dot Org	📄 📄
Project	UAT Round 2	Application Draft		Revenue	Charity	Today New Complay	📄 📄
Project	Round 10	Application Draft		Capital	Housing Association	Talan	📄 📄
Project Capital Test 15th Aug...	Test forms	Application Draft		Capital	Local Authority	Gemserv	📄 📄

When you click on 'Go to Documents', you will not be able to view the 'Upload document' button for any uploads.



Document ID	File Name	Tag	Uploaded At	Uploaded By	Actions
HNES_MAIN_00870...	Test (3).docx	APPLICATION	18 Sept 2025, 16:03	xideseudduwe-1582@yopmail.com	📄

If an assessor raises a query during the assessment review process, your application status will be changed to **Application Clarification Raised**. This will allow you to reopen, edit and submit your application form to address the query. You will also be able to upload additional documents.

To view the clarifications raised, go to the Documents section and download the latest version of the HNES Clarification spreadsheet. The name of the document will be “HNES Clarification – HNES_MAIN_XXX_XG_RXX Version X”.

Document ID	File Name	Tag	Uploaded At	Uploaded By	Actions
HNES_MAIN_00866...	HNES Clarification - HNES...	CLARIFICATIONS	21 Sept 2025, 21:48	viren.purjani@talan.com	
HNES_MAIN_00866...	HNES Clarification - HNES_MAIN_001_CG_R10 Version 1.xlsx	CLARIFICATIONS	9 Sept 2025, 15:28	viren.purjani@talan.com	
HNES_MAIN_00866...	Application Clarification Qu...	CLARIFICATIONS	9 Sept 2025, 15:28	viren.purjani@talan.com	
HNES_MAIN_00866...	Application Clarification Qu...	CLARIFICATIONS	9 Sept 2025, 15:28	viren.purjani@talan.com	
HNES_MAIN_00866...	Application Clarification Res...	CLARIFICATIONS	9 Sept 2025, 15:27	viren.purjani+Applicant@talan.com	
HNES_MAIN_00866...	Application Clarification Res...	CLARIFICATIONS	9 Sept 2025, 15:27	viren.purjani+Applicant@talan.com	

The following bullets outline the steps required to respond to a clarification. Steps 1 and 2 will depend on the type of clarification raised, however Steps 3 to 5 will be required for all clarifications:

1. Edit your application to address any errors identified. Click “**Save Progress**” but **DO NOT** press submit at this stage (refer to Section 3 for how to edit your application form)
2. Upload any additional documents that have been requested and assign them to the **Clarifications** document type (refer to Section 3.4 for how to upload documents)
3. Update the Clarification excel spreadsheet with your responses to the clarifications raised, save the document with the file name “HNES Clarification – HNES_MAIN_XXX_XG_RXX Version X Responses” and upload to the Documents section (refer to Section 3.10 below for further instructions)
4. Open your application form and press “**Submit**”. This will revert the project status back to **Application Submitted**. The application form will be locked and documents cannot be uploaded
5. Reply to the clarifications email issued by hnesh@talan.com to confirm the clarifications have been addressed and are ready for further assessment.

3.9 DOWNLOADING DOCUMENTS

This section explains how you, as an applicant, can download one or multiple documents from the project workspace. When using the bulk download feature, the system will package all selected documents into a single ZIP file, which you can then extract to your local drive for easy access and review.

While applicants do not have permission to delete documents uploaded by the Scheme Administrator, you are able to download them for reference or editing. This ensures you have access to all relevant documentation throughout the project lifecycle, even if certain files are managed exclusively by the Scheme Administrator.

From the Projects dashboard, select the relevant project and click on the Action **“Go to Documents”**.

The screenshot shows the 'Projects' dashboard with a table of projects. The table has columns for Funding Round, Status, Internal Status, Application Type, Organisation Type, Applicant Organisation, and Actions. The 'Round 4' project is highlighted, and the 'Go to Documents' action is visible in the Actions column.

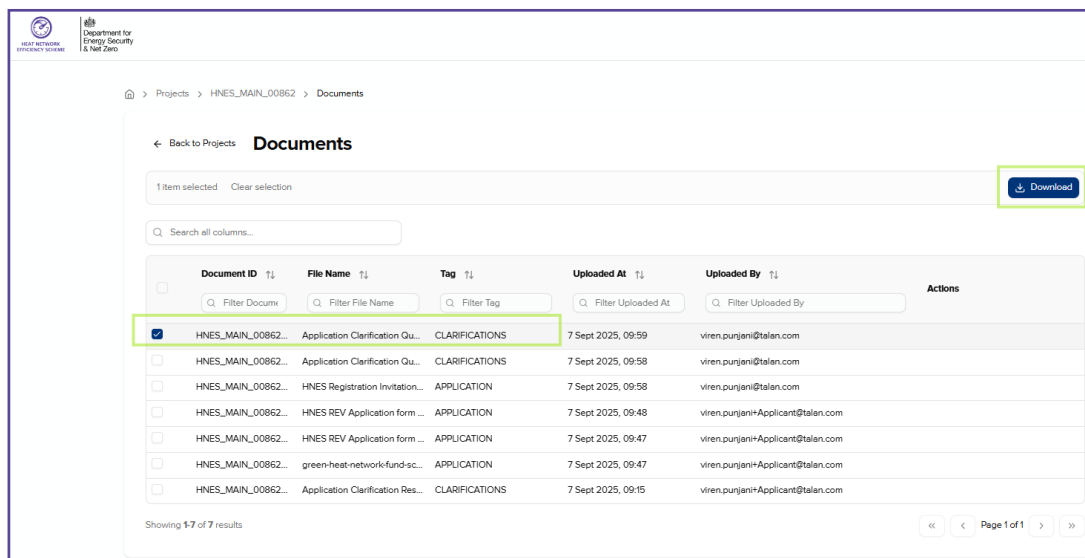
Funding Round	Status	Internal Status	Application Type	Organisation Type	Applicant Organisation	Actions
Round 4	Application Draft		Capital	Educational Institution	VP Project Organisation	 
Round 4	Application Clarification Res...		Revenue	Educational Institution	VP Project Organisation	  Go to Documents
UAT Round 2	Application Draft		Capital	Charity	Charity Organisation dot Org	 
Test forms	Application Draft	Application Under Internal ...	Capital	Local Authority	Gemserv	 

You can now view all documents related to the selected project, categorised with an appropriate tagging e.g. Application or Clarifications. ‘Application’ should be used for documents that were uploaded with the initial application submission, while ‘Clarification’ should be used for any additional documents that have been provided as part of the clarifications process.

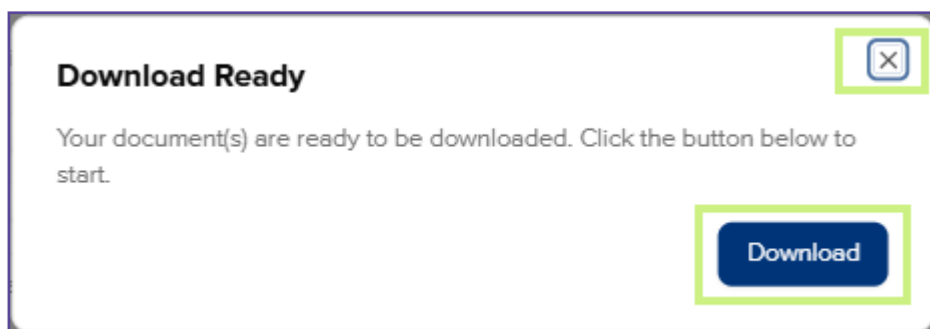
The screenshot shows the 'Documents' page for project HNES_MAIN_00862. The table has columns for Document ID, File Name, Tag, Uploaded At, and Uploaded By. The table shows documents with tags like CLARIFICATIONS and APPLICATION.

Document ID	File Name	Tag	Uploaded At	Uploaded By
HNES_MAIN_00862...	Application Clarification Ou...	CLARIFICATIONS	7 Sept 2025, 09:59	viren.punjani@talan.com
HNES_MAIN_00862...	Application Clarification Ou...	CLARIFICATIONS	7 Sept 2025, 09:58	viren.punjani@talan.com
HNES_MAIN_00862...	HNES Registration Invitation...	APPLICATION	7 Sept 2025, 09:58	viren.punjani@talan.com
HNES_MAIN_00862...	HNES REV Application form ...	APPLICATION	7 Sept 2025, 09:48	viren.punjani+Applicant@talan.com
HNES_MAIN_00862...	HNES REV Application form ...	APPLICATION	7 Sept 2025, 09:47	viren.punjani+Applicant@talan.com
HNES_MAIN_00862...	green-heat-network-fund-sc...	APPLICATION	7 Sept 2025, 09:47	viren.punjani+Applicant@talan.com
HNES_MAIN_00862...	Application Clarification Res...	CLARIFICATIONS	7 Sept 2025, 09:15	viren.punjani+Applicant@talan.com

To download a single document, select it by clicking the checkbox on the left. The **Download** button will then appear.



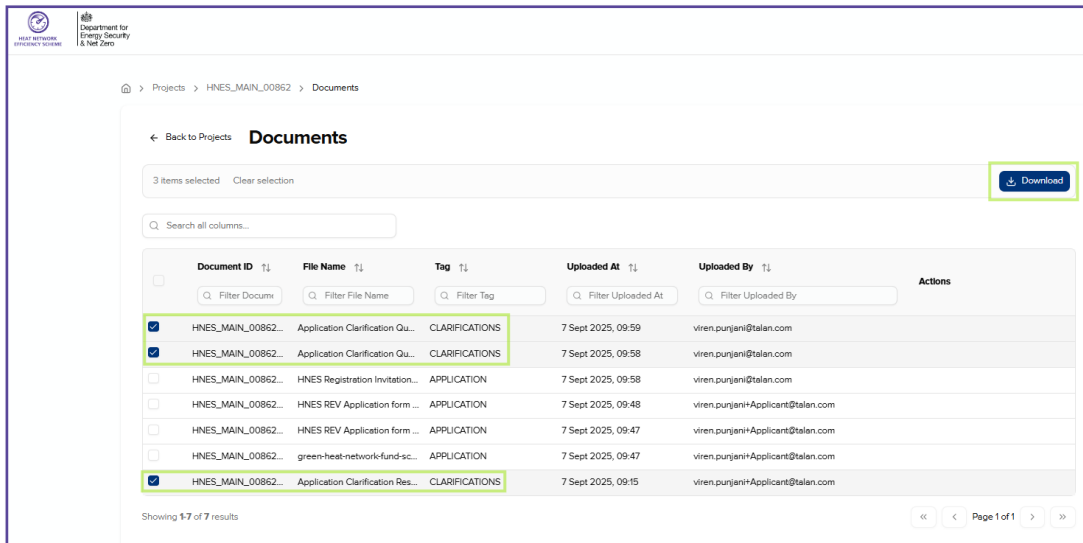
Click on the **“Download”** button. The following dialog message will appear:



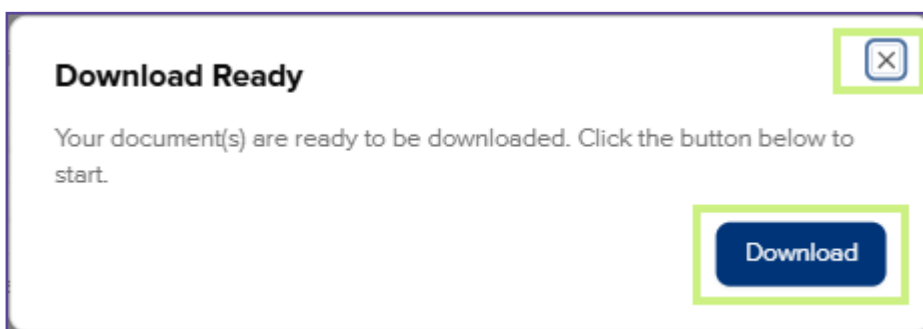
Click **“X”** to cancel the download or **“Download”** to start the download.

Downloading Multiple Documents

To download multiple documents, click the checkboxes to the left of all the required documents. The **Download** button will then appear.

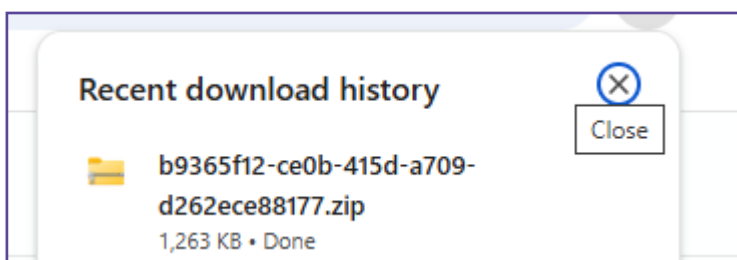


Click on the **“Download”** button. The following dialog message will appear:

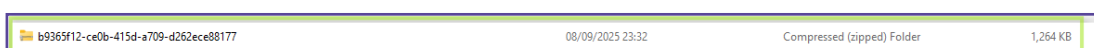


Click **“X”** to cancel the download or **“Download”** to start the download.

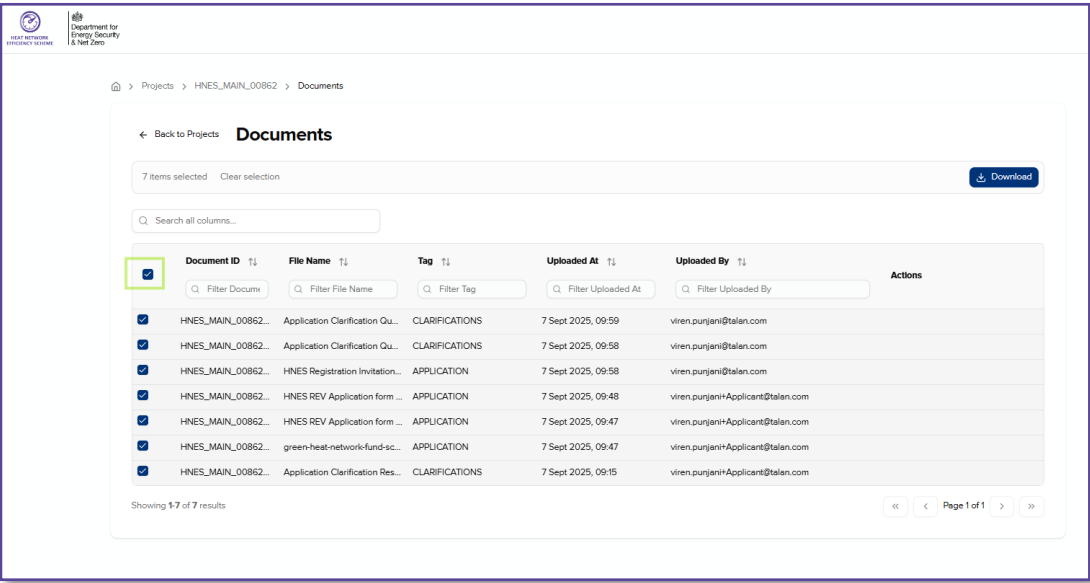
A zip file is now downloaded for extraction of the files.



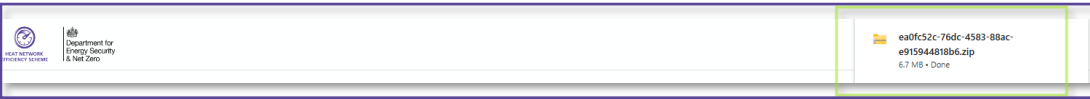
The zip file will now appear in the Downloads area of your local drive:



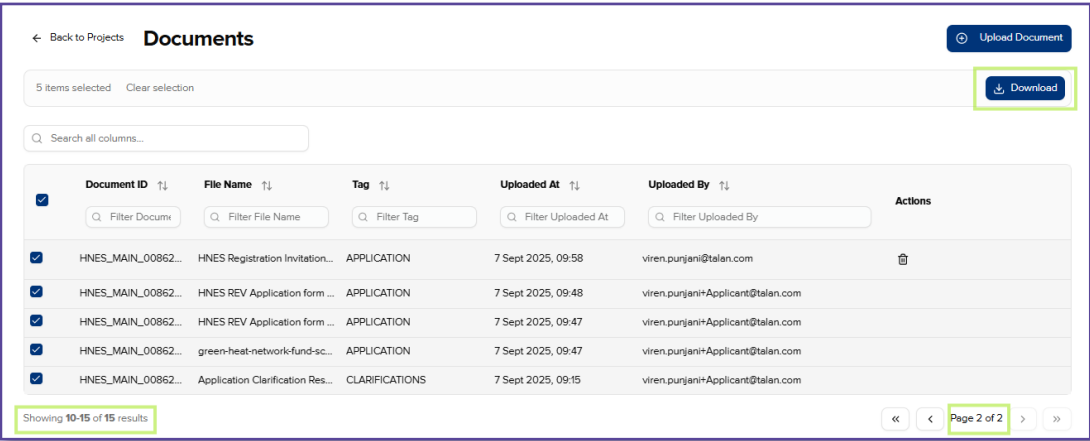
To download all documents shown on the display page, select them all in one go by clicking the top left checkbox next to the Fields:



Click on the “**Download**” button. This will select ALL documents on that page (up to 10 files) and will download in a zip file.



If more than 10 documents have been uploaded (e.g. 15 documents will mean 5 documents appear on the next page), and all documents are required to be downloaded, then navigate to the next page using the right arrow for Page 1 of 2 and complete the above steps again for the second page displayed.



3.10 UPDATING THE CLARIFICATION SPREADSHEET

This section explains how to update the clarification spreadsheet and upload it to the application portal. It explains the file naming convention to be used and that applicants will need to email hnes@talan.com to confirm their responses have been submitted.

Once you have downloaded the latest HNES Clarification spreadsheet, update Columns E and F with your responses to the clarifications raised. This could either be a direct response to the clarification question, confirmation that the application form has been updated, or signposting to a new document that has been uploaded.

Heat Network Efficiency Scheme (HNES) - Clarification Questions				
Dear Applicant,				
Following review of your application our assessment team has identified some areas within your application which will require clarification and possible amendment.				
To enable our assessors to review your clarifications efficiently, please can you kindly complete the below table.				
Application Reference:	HNES_MAIN_001_CG_R10	Application Name:	Test Application	Clarification Deadline Date:
Question or Area of Application	Date Issued	Clarification Question	Applicant Response	Supporting Document Reference (if applicable)
Section A - Applicant Information	24/09/2025	The VAT number provided doesn't match the applicant organisation. Please can you review your application form and update this?	Our VAT number is GB123456789. The application form has been updated to reflect this.	
Section E - Declarations	24/09/2025	Please provide quotes to support your grant request	Quotes have been uploaded into the documents section of the portal	"Quote 1 - Heat Network Improvements"
Section C - Project Narrative	24/09/2025	You mention in your application that a meeting has been held with residents to discuss this project. Please can you provide further detail as to any concerns the residents raised?	Residents were generally happy with the approach taken, they were mainly concerned about how disruptive the works would be for them.	

Please return your completed clarifications by the required deadline date by uploading them in the documents section of your application and setting the document type to "Clarifications".

Once ready, please email hnes@gemserv.com to confirm they have been uploaded.

When all clarifications have been addressed, save the HNES Clarification spreadsheet and rename it to include **Responses** in the title e.g. "HNES Clarification – HNES_MAIN_XXX_XG_RXX Version X Responses".

Projects > HNES_MAIN_00866 > Documents

Back to Projects

Documents

Upload Document

Search all columns...

Filter DocumentFilter File NameFilter TagFilter Uploaded AtFilter Uploaded By

Document ID	File Name	Tag	Uploaded At	Uploaded By	Actions
☐ HNES_MAIN_00866...	HNES Clarification - HNES... HNES Clarification - HNES_MAIN_001_CG_R10 Version 1 Responses.xlsx	CLARIFICATIONS	21 Sept 2025, 21:54	viren.punjani+Applicant@talan.com	☐
☐ HNES_MAIN_00866...	HNES Clarification - HNES...	CLARIFICATIONS	21 Sept 2025, 21:48	viren.punjani@talan.com	☐
☐ HNES_MAIN_00866...	Application Clarification Qu...	CLARIFICATIONS	9 Sept 2025, 15:28	viren.punjani@talan.com	☐
☐ HNES_MAIN_00866...	Application Clarification Qu...	CLARIFICATIONS	9 Sept 2025, 15:28	viren.punjani@talan.com	☐
☐ HNES_MAIN_00866...	Application Clarification Qu...	CLARIFICATIONS	9 Sept 2025, 15:28	viren.punjani@talan.com	☐
☐ HNES_MAIN_00866...	Application Clarification Res...	CLARIFICATIONS	9 Sept 2025, 15:27	viren.punjani+Applicant@talan.com	☐

To upload the new Clarifications spreadsheet, click on **“Go to Documents”**.

HEAT NETWORK EFFICIENCY SCHEME | Department for Energy Security & Net Zero

Projects

Search all columns...

Funding Round	Status	Internal Status	Application Type	Organisation Type	Applicant Organisation	Actions
Round 4	Application Draft		Capital	Educational Institution	VP Project Organisation	
Round 4	Application Clarification Re...		Revenue	Educational Institution	VP Project Organisation	
uct Capital	UAT Round 2	Application Draft	Capital	Charity	Charity Organisation dot Org	
	UAT Round 2	Application Draft	Revenue	Charity	Today New Complay	
	Round 10	Application Draft	Capital	Housing Association	Talan	
15th Aug...	Test forms	Application Draft	Capital	Local Authority	Gemserv	

Showing 1-6 of 6 results

The **Upload Document** button is now visible for you to upload the updated Clarification document.

HEAT NETWORK EFFICIENCY SCHEME | Department for Energy Security & Net Zero

Projects > HNES_MAIN_00862 > Documents

← Back to Projects Documents

Search all columns...

Document ID	File Name	Tag	Uploaded At	Uploaded By	Actions
No results found.					

Showing 0 of 0 results

Click on the **“Upload document”** button. Select **Clarifications** from the Document Category dropdown.

Create New Documents

Upload Project Document

Project REF: HNES_MAIN_01051

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.

Upload Document

Click on the “Choose File No file chosen” section.

Create New Document

Upload Project Document

Project REF: **HNES_MAIN_00862**

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

Document Category

Clarifications

Upload Document

Choose file No file chosen

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

Cancel

Upload Document

Select the document you want to upload and click “Open”.

Name	Status	Date modified	Type	Size
HNES Clarification - HNES_MAIN_001_CG_R10 Version 1 Responses		21/09/2025 22:53	Microsoft Excel Worksheet	11 KB
HNES Clarification - HNES_MAIN_001_CG_R10 Version 1		19/08/2025 15:39	Microsoft Excel Comma Separat...	8 KB
Application Clarification Response Three		18/08/2025 10:23	Microsoft Word Document	966 KB
Verify Accurate Preview Display as per Application Form		18/08/2025 10:23	Microsoft Word Document	1,111 KB
Restrict Assessor Access to Assigned Projects		18/08/2025 10:23	Microsoft Word Document	448 KB

me HNES Clarification - HNES_MAIN_001_CG_R10 Version 1 Responses

All Files

Open

Cancel

The chosen file is now ready to be uploaded. Click on **“Upload Document”**.

← Back to Projects **Documents**

Create New Document [X]

Upload Project Document

Project REF: **HNES_MAIN_00866**

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

Document Category
Clarifications

Upload Document

Choose file HNES Clarification - HNES_MAIN_001_CG_R10 Version 1 Responses.xlsx

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

HNES Clarification - HNES_MAIN_001_CG_R10 Version 1 Responses.xlsx (0.01 MB)

Cancel **Upload Document**

The file is now uploaded with the Clarifications tag in the Document area.

← Back to Projects **Documents** **Upload Document**

Search all columns...

Document ID	File Name	Tag	Uploaded At	Uploaded By	Actions
HNES_MAIN_00866...	HNES Clarification - HNES...	CLARIFICATIONS	21 Sept 2025, 22:03	viren.punjani@talan.com	[X]
HNES_MAIN_00866...	HNES Clarification - HNES...	CLARIFICATIONS	21 Sept 2025, 22:48	viren.punjani@talan.com	[X]
HNES_MAIN_00866...	Application Clarification Qu...	CLARIFICATIONS	9 Sept 2025, 15:28	viren.punjani@talan.com	[X]
HNES_MAIN_00866...	Application Clarification Qu...	CLARIFICATIONS	9 Sept 2025, 15:28	viren.punjani@talan.com	[X]
HNES_MAIN_00866...	Application Clarification Qu...	CLARIFICATIONS	9 Sept 2025, 15:28	viren.punjani@talan.com	[X]

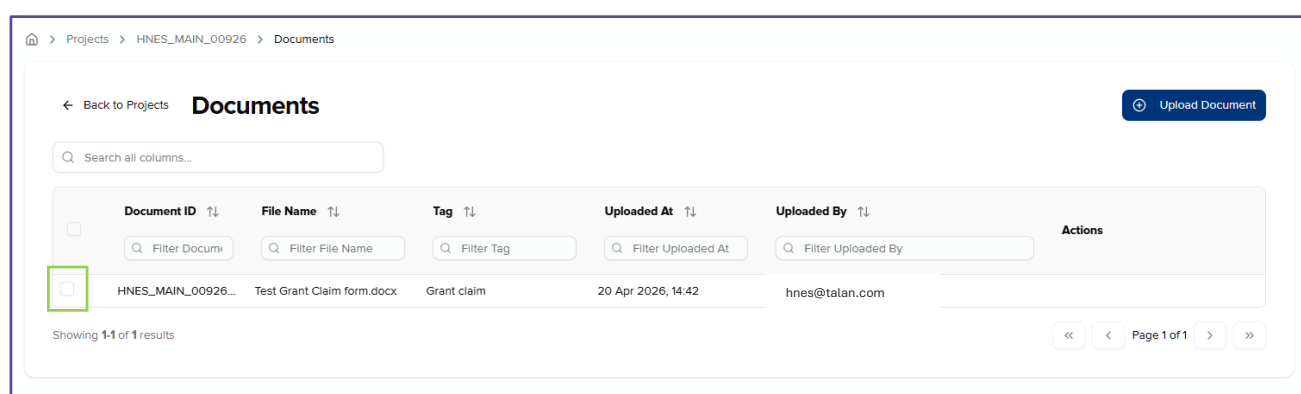
Once all documents have been uploaded and any changes to the application form made, go through to the final page of the application form and press **“Submit”**. This will resubmit the application form and change the status back to Application Submitted. The application form will again be locked and no further documents can be uploaded.

4 FUNDED PROJECTS ACTIVITIES

4.1 SUBMITTING GRANT CLAIM EVIDENCE

This section explains how to complete the grant claim form and upload evidence of spend to the application portal. It explains the Document Category to select, the file naming convention to be used and that applicants will need to email hnes@talan.com to confirm their grant claims have been uploaded.

A blank grant claim form can be found in the Documents section of each funded application, with the Tag **“Grant claim”**. Select this file using the checkbox on the left-hand side and click the **“Download”** button, as explained in Section 2.13.



As outlined in Section 2.8, each file must have a unique filename otherwise it cannot be uploaded into the portal. Once downloaded, rename the grant claim form to give it a unique filename, for example by including Claim 1 or the current month and year at the end (e.g. “Grant Claim Form Claim 1”, or “Grant Claim Form May 2026”).

Complete the grant claim form including the amount of grant being claimed. Non-Local Authority applicants should reference the filenames of any supporting evidence also being submitted under the “Evidence provided in support” column. When naming supporting evidence files, include the same differentiator as the grant claim form, e.g. if the grant claim form is renamed “Grant Claim Form May 2026”, then include May 2026 in the supporting evidence filenames (“INV001 - May 2026”, “Remittance 1 - May 2026”). This helps us to easily identify which documents relate to which grant claim forms.

Upload the grant claim form back into the portal by clicking “**Upload Document**” and selecting “**Grant claim**” as the Document Category. Repeat this for all supporting evidence files. More detailed guidance on how to upload documents can be found in Section 2.14.

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.

Upload Document

Once all your documents are uploaded, email hnes@talan.com to inform us that the grant claim has been submitted.

From the Documents page, you can see all files relating to grant claims by typing “Grant claim” into the Filter Tag box:

← Back to Projects

Documents

Search all columns...

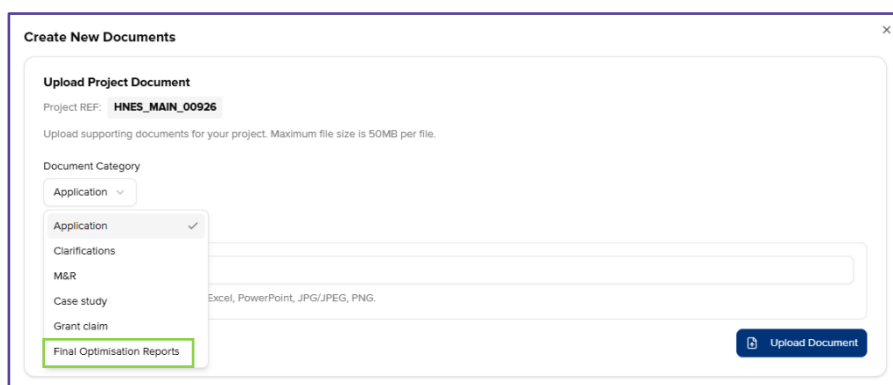
	Document ID ↑↓	File Name ↑↓	Tag ↑↓	Uploaded At ↑↓
	Filter Document	Filter File Name	Filter Tag	Filter Uploaded At
☐	HNES_MAIN_00926...	Final Optimisation Study tes...	Final Optimisation Reports	21 Apr 2026, 09:25
☐	HNES_MAIN_00926...	Case Study Capital Templat...	Case study	21 Apr 2026, 09:22
☐	HNES_MAIN_00926...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

4.2 SUBMITTING FINAL OPTIMISATION REPORTS – REVENUE PROJECTS ONLY

This section explains how to upload final optimisation reports to the application portal. It explains the Document Category to select and that applicants will need to email hnes@talan.com to confirm their documents have been uploaded.

Revenue grant applicants must upload their completed Optimisation Study and Techno-Economic Analysis documents to the portal for review by HNES before the project can be signed off.

From the Documents section of the relevant project, upload the required files one at a time into the portal by clicking **“Upload Document”** and selecting **“Final Optimisation Reports”** as the Document Category. More detailed guidance on how to upload documents can be found in Section 2.14.



The screenshot shows a web interface titled "Create New Documents". Inside, there's a section "Upload Project Document" with "Project REF: HNES_MAIN_00926". Below this, it says "Upload supporting documents for your project. Maximum file size is 50MB per file." There's a "Document Category" dropdown menu currently set to "Application". The dropdown is open, showing options: "Application" (checked), "Clarifications", "M&R", "Case study", "Grant claim", and "Final Optimisation Reports" (highlighted with a green box). To the right of the dropdown is a large text input field with a placeholder "Excel, PowerPoint, JPG/JPEG, PNG." and an "Upload Document" button with a document icon.

Once all your documents are uploaded, email hnes@talan.com to inform us that the reports have been submitted.

4.3 SUBMITTING CASE STUDY DOCUMENTS

This section explains the different approaches to submitted case studies for capital and revenue applicants. Capital applicants will complete an online form, while revenue applicants will upload a case study document into the application portal. It explains the Document Category that revenue applicants need to select and that applicants will need to email hnes@talan.com to confirm their documents have been uploaded.

Capital projects will need to provide two case studies. The first is required when the project works have been commissioned and focuses on project delivery. The second is required two years after project commissioning and focuses on the benefits, e.g. carbon savings etc. In each case, you will need to fill in this [online case study questionnaire](#) and HNES will draft a case study based on the information provided for you to sign off. These will then be published on the HNES website. A template of the publication format we will use for the case studies can be found in the Documents section for reference (see Revenue below for instructions on downloading the template).

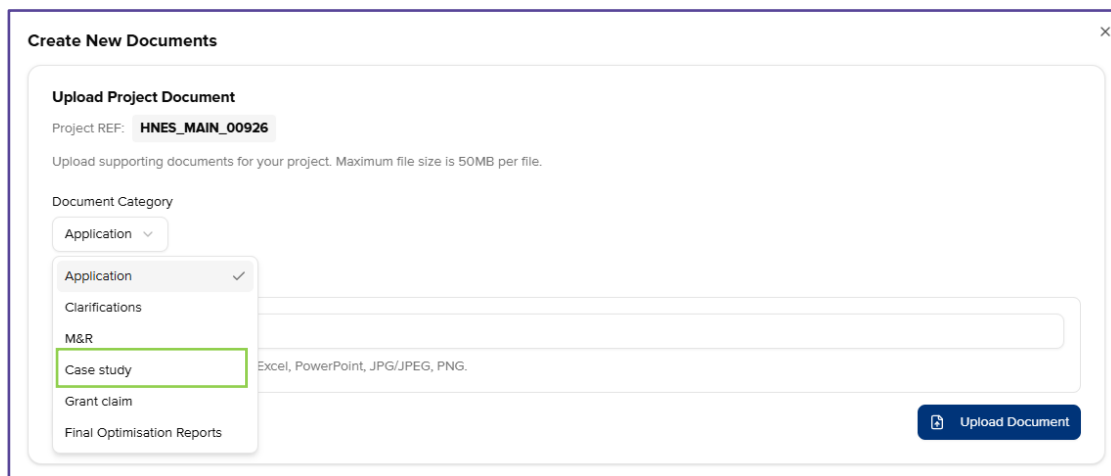
For revenue projects, the case study template needs to be submitted once the Optimisation Study has been completed. A blank case study template can be found in the Documents section of each funded application, with the Tag “**Case study**”. Select this file using the checkbox on the left-hand side and click the “**Download**” button, as explained in Section 2.13.

The screenshot shows the 'Documents' section of the application portal. At the top, there is a 'Back to Projects' link and a 'Documents' header. Below this, there is a '1 Item selected' status and a 'Clear selection' link. A search bar is present with the placeholder text 'Search all columns...'. The main content area is a table with the following columns: Document ID, File Name, Tag, Uploaded At, and Uploaded By. The table contains five rows of documents. The second row, 'Case Study Capital Templat...', is selected, indicated by a blue checkbox in the left margin. Below the table, there is a 'Showing 1-5 of 5 results' message and a pagination control showing 'Page 1 of 1'.

Document ID	File Name	Tag	Uploaded At	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

Once downloaded, rename the case study template to include the name of the project and the HNES application reference number.

Complete the case study template and reupload it to the portal by clicking “**Upload Document**” and selecting “**Case study**” as the Document Category. More detailed guidance on how to upload documents can be found in Section 2.14.



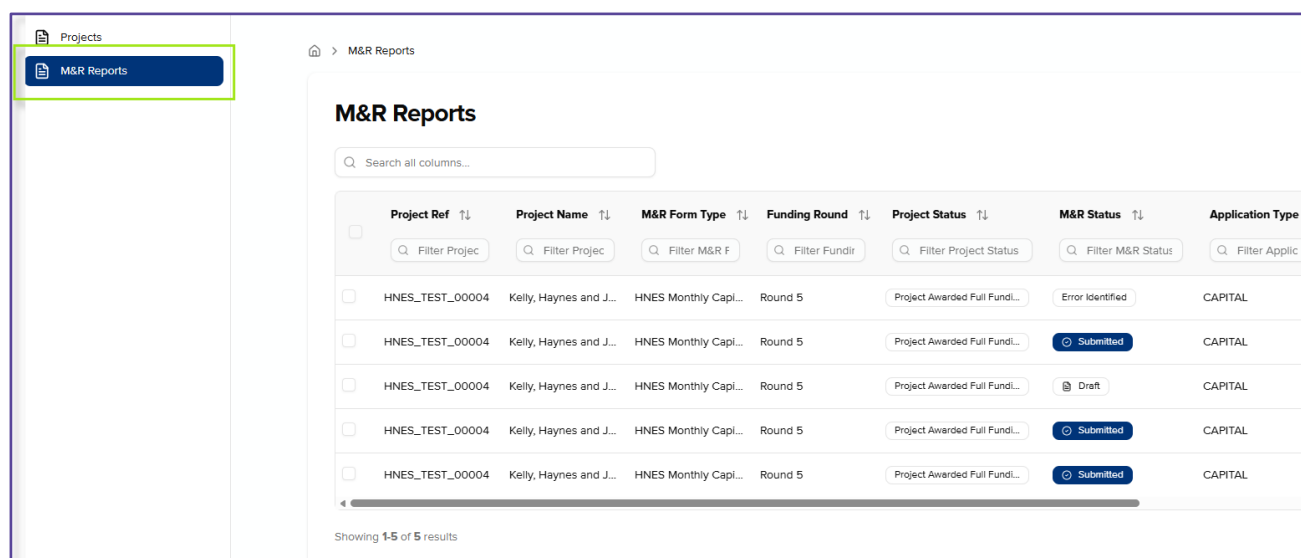
The screenshot shows a web portal titled "Create New Documents" with a close button (X) in the top right corner. Inside the portal, there is a section titled "Upload Project Document". Below this title, it says "Project REF: HNES_MAIN_00926". A note states: "Upload supporting documents for your project.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

Once your document is uploaded, email hnes@talan.com to inform us that the case study has been submitted.

4.4 COMPLETING MONITORING AND REPORTING RETURNS

This section explains how to access and complete Monitoring and Reporting (M&R) returns. It explains the different M&R reports and status types. It also outlines how to edit and submit the return and the fact that only one person can edit the M&R return at a time.

To access the M&R returns, select M&R Reports on the left-hand side to be taken to the M&R Reports dashboard:



Each report has an **M&R Form Type** which details the type of M&R return.

HNES Monthly Capital: completed by capital applicants each month from the month their Funding Agreement is signed until their funded measures have been commissioned. This will open on the 7th day of the month after the reporting month and will be due on the last working day of the month. For example, the January monthly return will open on 7th February and will be due on 28th February.

HNES Quarterly Capital: completed by capital applicants each quarter from the quarter their Funding Agreement is signed until two years after the funded measures have been commissioned. This will open on the 7th day of the month after the first month in the quarter and will be due on the last working day of the month after the last month in the quarter. For example, the March quarterly report will cover January, February and March. It will open on 7th February and will be due on 30th April.

HNES Monthly Revenue: completed by revenue applicants each month from the month their Funding Agreement is signed until their Optimisation Study has been submitted and signed off by the HNES Programme Manager. This will open on the 7th day of the month after the reporting month and will be due on the last working day of the month. For example, the January monthly return will open on 7th February and will be due on 28th February.

M&R Reports						
Search all columns...						
Project Ref ↑↓	Project Name ↑↓	M&R Form Type ↑↓	Funding Round ↑↓	Project Status ↑↓	M&R Status ↑↓	Application Type ↑↓
Q NES_TEST...	Q Filter Project	Q Filter M&R F	Q Filter Fundir	Q Filter Project Status	Q Filter M&R Status	Q Filter Applic
☐ HNES_TEST_00004	Kelly, Haynes and J...	HNES Monthly Capi...	Round 5	Project Awarded Full Fundi...	Error Identified	CAPITAL
☐ HNES_TEST_00004	Kelly, Haynes and J...	HNES Monthly Capital	Round 5	Project Awarded Full Fundi...	Approved	CAPITAL

By default, M&R returns will be displayed chronologically based on the report submission deadline. Those with the most recent submission deadlines will be displayed at the top. If you have more than one funded project, you will see all the M&R returns relating to the most recent submission deadline first. If you wish to group M&R returns by project, you can use the up and down arrows next to Project Ref to change the default ordering.

Each report has an **M&R Status**:

M&R Reports						
Search all columns...						
Project Status ↑↓	M&R Status ↑↓	Application Type ↑↓	Reporting Month ↑↓	Submission Deadline ↑↓	Applicant Organisation ↑↓	Actions
Q Filter Project Status	Q Filter M&R Status	Q Filter Applic	Q Filter Report	Q Filter Submission Deadline	Q Filter Applicant Organisation	
Project Awarded Full Fundi...	Error Identified	CAPITAL	Mar-25	2025-04-30	Wilkinson-Davies	🔍 📄
Project Awarded Full Fundi...	Approved	CAPITAL	Feb-25	2025-03-31	Wilkinson-Davies	📄
Project Awarded Full Fundi...	Submitted	CAPITAL	Jan-25	2025-02-28	Wilkinson-Davies	📄
Project Awarded Full Fundi...	Draft	CAPITAL	Dec-24	2025-01-31	Wilkinson-Davies	🔍 📄

Draft: this report has not yet been completed and is available to edit

Submitted: this report has been submitted but has not yet been reviewed by the HNES Programme Manager. It cannot be edited.

Error Identified: this report has been reviewed by the HNES Programme Manager and an error has been identified that needs to be updated. This report can be edited. You will also receive an email from hnes@talan.com informing you that an error has been found and requesting that you resolve it.

Approved: this report has been reviewed by the HNES Programme Manager and the report has been completed correctly. The report can no longer be edited.

To edit an M&R return in either Draft or Error Identified status, scroll to the right and click the **Edit M&R** button under the Actions heading.

The screenshot shows a table titled "M&R Reports". It has a search bar at the top and several filter buttons: "Filter Report", "Filter Submission Deadline", and "Applicant Organisation". The table has columns for "Reporting Month", "Submission Deadline", "Applicant Organisation", and "Actions". The first row shows "Feb-25", "2025-03-31", and "Wilkinson-Davies". In the "Actions" column, there is a green icon and a document icon. Below the document icon is a button labeled "Edit M&R".

Reporting Month	Submission Deadline	Applicant Organisation	Actions
Feb-25	2025-03-31	Wilkinson-Davies	  Edit M&R

The M&R return will open:

The screenshot shows the "HNES Monthly Capital Monitoring and Reporting Form v3.4". It is a multi-step form with "Step 2 of 4" currently selected. The form is titled "Section A - Project Information". It contains a table for "Project details" with columns A and B. The table has 4 rows: "Reporting month" (Feb-25), "Heat Network name" (Kelly, Haynes and Jordan), "HNES project reference number" (HNES_TEST_00004), and "Name of grant recipient (organisation or company)" (Wilkinson-Davies). Below the table, there are sections for "Monitoring form completed by", "Project responsible officer", and "Service providers".

	A	B
1	Reporting month	Feb-25
2	Heat Network name	Kelly, Haynes and Jordan
3	HNES project reference number	HNES_TEST_00004
4	Name of grant recipient (organisation or company)	Wilkinson-Davies

Expandable Sections: These sections will be open by default, but can be collapsed or expanded as required by clicking the **up arrow** or **down arrow** respectively on the right-hand side:

The screenshot shows the "A - Applicant info" section of the form. It is titled "Section for A - Applicant info". Below the title, there is a section for "Applicant Organisation Information". On the right-hand side of this section, there is a green box containing a downward-pointing arrow, indicating that the section can be collapsed.

Mandatory Fields: All required fields are marked with an asterisk (*). You can freely navigate and edit the whole form without completing the mandatory fields in each section, however you will not be able to **Submit** the M&R return until all mandatory fields have been completed correctly:

Monitoring form completed by

First name *

Enter text

First name is required

Last name *

Enter text

Last name is required

Email address *

Enter text

Email address is required

Telephone number *

Enter text

Telephone number is required

Navigating the Return: You can update all sections of the return starting from **Section A** by using the **Next** and **Previous** buttons to navigate through the return. These appear at both the top and bottom of each Section.

HNES Monthly Capital Monitoring and Reporting Form v3.4

To be completed monthly until all funded measures (both grant and match funded) have been installed

Save Progress

Previous

Next

Section A - Project Information

Step 2 of 4

Project details

C1:C4

fx

A

B

1 Reporting month

Feb-25

2 Heat Network name

Kelly, Haynes and Jordan

3 HNES project reference number

HNES_TEST_00004

4 Name of grant recipient (organisation or company)

Wilkinson-Davies

Save Progress: You can save your changes at any time by clicking the **Save Progress** button. When filling in the M&R return, you are advised to save your data at regular intervals.

After saving, you may continue editing, return to the M&R screen, log out, or close your browser without losing any entered data.

When you log back in later, the M&R return will retain all previously saved responses, allowing you to seamlessly continue from where you left off.

Note: When entering data into datagrid cells, you will need to **double click** on the cell first before entering your response. If you only click once, you will still be able to enter data however it won't always be retained. If this happens, click on the cell again, re-enter the data and this time it will be retained.

Supply chain information

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

E1:E5

fx

B

I

S

U

A

	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			

Submitting the Return: when the return is completed, click the **Submit** button at the end of the form.

Declaration

I declare that all the information provided in this form is correct to the best of my knowledge *

Yes

Confirm Form Completed

Please type "Confirm" into the text box below to confirm you understand that once you press the "Submit" button you will no longer be able to make changes to this reporting form

Confirm

< Previous

Submit

You can save your progress and navigate freely between steps. Validation only occurs when you submit the form.

If the return is successfully submitted, a message will appear to confirm this. Navigate back to the M&R dashboard by clicking the M&R Reports button on the left-hand side and you will see the status has changed to Submitted and the Edit M&R button is no longer visible under the Actions heading.

M&R Status	Application Type	Reporting Month	Submission Deadline	Applicant Organisation	Actions
submitted	Filter Applic	Filter Repor	Filter Submission Deadline	Filter Applicant Organisation	
Submitted	CAPITAL	Feb-25	2025-03-31	Wilkinson-Davies	

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UK Government

TAIAN

RAMBOLL

gleeds

If there are errors in the return, the **Submission Failed** message will appear and any sections that need to be addressed will be highlighted in red. Address all the errors and then press **Submit** again to submit the form.

The screenshot shows a form with four rows of input fields:

	7	Proposed risk mitigation description					
8	Mitigation in place?						
9	Residual impact						
10	Residual likelihood						

Below the table, a green box highlights an error message: "Required cells are empty: B2, B3, B4, B5, B7, B8, B9, B10".

The form includes a "Declaration" section with a "Yes" button and a "Confirm Form Completed" section with a "Confirm" button. A red box at the bottom right displays the "Submission failed" message: "Please check the form for errors and try again." The "Submit" button is highlighted in blue.

Concurrent editing: If no one else is editing the M&R return and you click the “Edit M&R” button, the system will grant you access to update the M&R return. During this time, other applicants will be restricted from making edits and will only be able to view the M&R return in read-only mode.

The screenshot shows the "M&R Reports" table with the following columns: Reporting Month, Submission Deadline, Applicant Organisation, and Actions.

Reporting Month	Submission Deadline	Applicant Organisation	Actions
Feb-25	2025-03-31	Wilkinson-Davies	 

The "Edit M&R" button is highlighted in blue.

If you log in while another applicant is actively editing the M&R return, you will only be able to view the return in read-only mode. The system will restrict editing access to ensure that only one applicant can make changes at a time. If you click on “**Edit M&R**” when another user is already editing the M&R return, the following box will appear:

The screenshot shows a "Form Locked" dialog box with the following text:

Form Locked

This form is currently being edited by Viren Punjani: viren.punjani+Applicant@talan.com. You can view it in read-only mode or wait for them to finish. Do you want to proceed to view it in read-only mode?

Buttons: Cancel, Proceed

Click **Cancel** to return to the M&R Dashboard or click **Proceed** to view the M&R summary.

View M&R summary: you can also see a summary of the M&R return by clicking the **View M&R** button on the M&R Reports dashboard.

M&R Reports

Search all columns...

Reporting Month	Submission Deadline	Applicant Organisation	Actions
Feb-25	2025-03-31	Wilkinson-Davies	View M&R

This displays all the current saved information on one screen.

M&R Submission Summary APPROVED

HNES Monthly Capital Monitoring and Reporting Form v3.3

Project Ref: HNES_TEST_00004
Project Name: Kelly, Haynes and Jordan
M&R Form Name: HNES Monthly Capital Monitoring and Reporting Form v3.3
Funding Round: Round 5
Project Status: PROJECT_AWARDED_FULL_FUNDING

M&R Status: APPROVED
Reporting Month: Aug-23
Submission Deadline: N/A
Application Type: CAPITAL
Application Organisation: Wilkinson-Davies

Monitoring and Reporting Information

Section A - Project Information

	A	B
1	Reporting month	Jan-25
2	Heat Network name	Wall, Bentley and Alexander
3	HNES project reference number	HNES_CAP_Application_Barnes Ltd
4	Name of grant recipient (organisation or company)	Ahmed, Ford and Brown



UK Government



HEAT NETWORK
EFFICIENCY SCHEME