

## Boiler Upgrade Scheme: Installer guidance v3

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This guidance document is for Microgeneration Certified Scheme (MCS) installers who want to apply for a grant from the Boiler Upgrade Scheme. It details which low carbon heat technologies and properties are eligible. It also explains the role of the installer and property owner in the voucher application and voucher redemption application processes.

**The regulations governing the Boiler Upgrade Scheme were changed by the Department for Energy Security and Net Zero and will come in to force on 8 May 2024. This guidance applies only where an application has been properly made after 8 May 2024<sup>1</sup>. For any applications properly made before 8 May 2024 date please refer to version 2.6 of this guidance. See paragraph 3.53 below for a definition of properly made.**

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<sup>1</sup> See Regulation 25 of the Boiler Upgrade Scheme (England and Wales) (Amendment) Regulations 2024

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## 1. Introduction

### Boiler Upgrade Scheme overview

1.1. The Boiler Upgrade Scheme (BUS) aims to incentivise and increase the deployment of low carbon heating by providing targeted support to the supply chain.

1.2. The BUS provides upfront capital grants to support the installation of heat pumps and, in limited circumstances, biomass boilers in domestic and non-domestic buildings. Grants of £7500 are available for air source heat pumps (ASHPs) and ground source heat pumps (GSHPs), and grants of £5000 are available for biomass boilers.

1.3. BUS is underpinned by the Boiler Upgrade Scheme (England and Wales) Regulations 2022, referred to as “the BUS regulations”, laid on 22 May 2022 and amended on 8 May 2024<sup>2</sup> Ofgem (on behalf of the Gas and Electricity Markets Authority) is the administrator of the BUS. We administer this scheme in line with the BUS regulations.

1.4. The scheme is installer-led, meaning that the MCS installer needs to apply to the scheme on behalf of the property owner. Installers must be MCS certified to apply to the scheme. They must also be certified to install either heat pumps or biomass boilers. Installers are responsible for applying to us for a voucher on behalf of a property owner. The installer is responsible for supplying eligibility information to us to support the application. The property owner then needs to confirm to us that they consent to a BUS voucher application being made. Following the heat pump or biomass boiler commissioning, installers can submit a voucher redemption application. Vouchers for ASHPs and biomass boilers are valid for 3 months and vouchers for GSHPs are valid for 6 months from the date of issue.

1.5. This guidance is for installers of heat pumps and biomass boilers. It explains our administration of the BUS and includes details of:

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<sup>2</sup> [The Boiler Upgrade Scheme \(England and Wales\) Regulations 2022](https://www.legislation.gov.uk/ukdsi/2022/9780348232349)

(<https://www.legislation.gov.uk/ukdsi/2022/9780348232349>). The 2022 Regulations were amended by the Boiler Upgrade Scheme (England and Wales) (Amendment) Regulations 2024, which came into force on 8 May 2024. This guidance only applies in respect of applications which were properly made after 8 May 2024 (but it is important to note that Regulation 25 of the 2024 Regulations makes transitional provision in respect of applications which were properly made before 8 May 2024).

**This guidance applies to applications submitted on or after 8 May 2024.**

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- eligibility requirements
- installer account creation
- how to submit a BUS voucher application
- how to submit a BUS redemption application once a low carbon heating system has been installed
- the scheme budget
- our audit regime and compliance processes
- scheme reporting

1.6. This guidance does not anticipate every scenario that may arise. If a scenario arises that is not addressed in this guidance, we will adopt an approach that is consistent with the relevant legislation, in this case the BUS regulations.<sup>3</sup>

**1.7. It is the responsibility of each applicant to understand the requirements of the BUS regulations and how these apply. This guidance is not a definitive guide to the BUS regulations, and it does not constitute legal advice. Installers are responsible for ensuring that they comply with the scheme requirements and they should obtain their own legal advice. Where there is any ambiguity or conflict between the guidance and regulations, the regulations take precedence.**

1.8. This guidance represents our approach to matters concerning the general administration of the BUS in accordance with the BUS regulations. Where there are future changes to the BUS regulations, we will revise our administrative arrangements accordingly.

## **Personal data**

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<sup>3</sup> [The Boiler Upgrade Scheme \(England and Wales\) Regulations 2022 and The Boiler Upgrade Scheme \(England and Wales\) Regulations 2024](#)

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1.9. We process all personal data collected in accordance with the assimilated law version of the General Data Protection Regulation 2016/679 (UK GDPR) and the Data Protection Act 2018.

1.10. Ofgem uses the personal data collected to perform its statutory functions and may share this information with other organisations in line with its duties under the UK GDPR.

1.11. For more information on how we process the personal information of installers on the BUS please refer to our installer information privacy policy which has been published separately.<sup>4</sup>

1.12. For more information on how we process the personal information of property owners on the BUS please refer to our property owner information privacy policy which has been published separately.<sup>5</sup>

## Related publications and useful links

- [Boiler Upgrade Scheme Regulations consultation: government response](#), (DESNZ, March 2024)
- [Notice confirming the grant level for air source heat pumps and ground source heat pumps will be £7,500](#) (DESNZ, 21 September 2023)
- [Digital portal for installers](#) (Ofgem, 26 November 2022)
  - [Boiler Upgrade Scheme \(BUS\)](#) (Ofgem)
  - [Boiler Upgrade Scheme: Guidance for property owners](#) (Ofgem, May 2022)
  - [Apply for the Boiler Upgrade Scheme: Overview - GOV.UK \(www.gov.uk\)](#) (DESNZ)
  - [BUS Monthly Scheme Update](#) (Ofgem)

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<sup>4</sup> <https://www.ofgem.gov.uk/publications/boiler-upgrade-scheme-privacy-notice-installers>

<sup>5</sup> <https://www.ofgem.gov.uk/publications/boiler-upgrade-scheme-privacy-notice-property-owners>



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- [BUS Quarterly Reports](#) (Ofgem)
- [Boiler Upgrade Scheme Regulations: approved standards - GOV.UK \(www.gov.uk\)](#) (DESNZ, April 2022)
- [The Boiler Upgrade Scheme \(England and Wales\) Regulations 2022 \(Government, May 2022\)](#)
- [Consultation response on Ofgem's Administration of the Boiler Upgrade Scheme \(Ofgem, April 2022\)](#)
- [Consultation on Ofgem's Administration of the Boiler Upgrade Scheme \(Ofgem, December 2021\)](#)
- [Future Support for Low Carbon Heat: Boiler Upgrade Scheme - Government response to Clean Heat Grant proposals within 'Future support for low carbon heat' consultation](#) (BEIS, October 2021)
- [Clean Heat Grant: further policy design proposals](#) (BEIS, February 2021)
- [Future support for low carbon heat - BEIS consultation](#) (BEIS, April 2020)

## Queries and further information

1.13. Any questions on the BUS guidance, or on our administration of the BUS, should be directed to the BUS Enquiries team at [BUS.Enquiry@ofgem.gov.uk](mailto:BUS.Enquiry@ofgem.gov.uk) or by phone on 0330 053 2006.

1.14. Ofgem takes fraud and non-compliance within our schemes seriously. Concerns about suspected fraud can be reported by emailing us at [counterfraud@ofgem.gov.uk](mailto:counterfraud@ofgem.gov.uk). Also see our website and chapter 9 of this guidance document for more details relating to suspected fraud and whistleblowing.

## 2. Roles and responsibilities

### Section summary

This chapter describes the roles and responsibilities of BUS stakeholders. This includes the government, Ofgem, installers, property owners, MCS and consumer codes. The roles and responsibilities listed here are non-exhaustive.

### Role of government

2.1. The Department for Energy Security and Net Zero (DESNZ) formerly known as BEIS, is responsible for the policy and scheme regulations. The Secretary of State also has responsibilities within the scheme, and these are set out in the BUS regulations, including but not limited to:

- approving and publishing the standards, including consumer codes,<sup>6</sup> that installers and products must adhere to<sup>7</sup>
- publishing budget allocations for BUS vouchers on an annual, and potentially quarterly basis if applicable<sup>8</sup>
- determining, publishing, and reviewing the value of BUS grants and, if required, altering their value<sup>9</sup>
- determining, publishing, and reviewing grant categories<sup>10</sup>

### Role of Ofgem

2.2. The BUS regulations describe our powers and functions for the BUS. Those functions include but are not limited to:

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<sup>6</sup> The BUS regulations, Regulation 4

<sup>7</sup> <https://www.gov.uk/government/publications/boiler-upgrade-scheme-regulations-approved-standards>

<sup>8</sup> The BUS regulations, Regulation 12

<sup>9</sup> The BUS regulations, Regulation 13

<sup>10</sup> The BUS regulations, Regulation 13

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- publishing procedural guidance to prospective installers and property owners<sup>11</sup>
- processing voucher applications and voucher redemption applications <sup>12</sup>
- making payments to installers following successful voucher redemption applications<sup>13</sup>
- publishing reports on how the BUS is operating <sup>14</sup>
- monitoring and enforcing compliance with the requirements of the BUS regulations<sup>15</sup>

## Role of installers

2.3. The obligations of installers are set out in the BUS regulations. Installers are responsible for:

- providing eligibility information and providing further information on request<sup>16</sup>
- being certified by the Microgeneration Certification Scheme (MCS) or an equivalent scheme<sup>17</sup>
- submitting voucher applications and voucher redemption applications on behalf of the property owner
- confirming that the information provided in relation to applications is accurate<sup>18</sup>

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<sup>11</sup> The BUS regulations, Regulation 29

<sup>12</sup> The BUS regulations, Regulations 14, 15 and 16

<sup>13</sup> The BUS regulations, Regulation 16

<sup>14</sup> The BUS regulations, Regulation 30

<sup>15</sup> The BUS regulations, Part 5

<sup>16</sup> The BUS regulations, Regulations 14,16 and 17

<sup>17</sup> The BUS regulations, Schedule 2. Under Regulation 4 the DESNZ are responsible for determining whether a scheme is equivalent to MCS. There are currently no schemes determined by DESNZ to be equivalent to MCS.

<sup>18</sup> The BUS regulations, Regulations 14 and 16

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- informing us of any incorrect information provided or any material changes within 14 days from the date of the change
- retaining a copy of any information relied upon for the submission of voucher applications and voucher redemption applications for six years
- engaging with audit and compliance processes when requested by us<sup>19</sup>

2.4. Installers are also responsible for passing on the discount that the BUS grant provides to the property owner.<sup>20</sup>

## **Role of property owners**

2.5. The BUS regulations also set out the responsibilities of property owners, including:

- confirming details related to their eligibility to us and ensuring that any information they provide or confirm to either installers or us in relation to an application is accurate
- confirming their consent for a BUS voucher application to be made on their behalf by their chosen installer.
- confirming they have read and understood any recommendations present on the Energy Performance Certificate (EPC)
- Where a property owner is a landlord, confirmed they have informed any tenant(s) of the impacts of the installation of the eligible system
- replying to us so that we can verify their identity when they are confirming their consent for a BUS voucher application be made on their behalf<sup>21</sup>
- taking part in audit and compliance processes when requested to by us<sup>22</sup>

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<sup>19</sup> The BUS regulations, Regulation 17

<sup>20</sup> The BUS regulations, Regulation 14

<sup>21</sup> The BUS regulations, Regulation 14

<sup>22</sup> The BUS regulations, Regulation 14, 16, and 18

## Role of MCS

2.6. MCS<sup>23</sup> is a certification scheme for microgeneration installation companies and products. It defines and maintains standards, providing confidence to consumers who wish to invest in small-scale technologies that produce electricity and heat from renewable sources.

2.7. Please contact MCS regarding issues with the:

- installation process
- installer
- MCS certificate or product

2.8. MCS works through its certification bodies. When a case is under review, the relevant certification body may contact the installer and/or the property owner.

## Role of consumer codes

2.9. Consumer codes aim to guarantee a high-quality experience for consumers. MCS installation companies working with domestic customers must also be a member of a consumer code approved by the Secretary of State which can be found through the GOV.UK website<sup>24</sup>. MCS works closely with these consumer codes to help address complaints for domestic consumers.

2.10. The two relevant consumer codes are the Home Insulation and Energy Systems Contractors Scheme (HIES)<sup>25</sup> and the Renewable Energy Consumer Code (RECC).<sup>26</sup> Property owners can find out which code their installer is signed up to, by looking on MCS's installer search.<sup>27</sup>

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<sup>23</sup> <https://mcscertified.com/>

<sup>24</sup> <https://www.gov.uk/government/publications/boiler-upgrade-scheme-regulations-approved-standards>

<sup>25</sup> <https://www.hiesscheme.org.uk/>

<sup>26</sup> <https://www.recc.org.uk/> <https://www.recc.org.uk/>

<sup>27</sup> <https://mcscertified.com/find-an-installer/>

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2.11. In the event of a dispute of with an installer, consumers can access the dispute resolution service provided by the consumer codes. Code related issues are addressed directly by the consumer codes, where there are technical aspects to a dispute, MCS works closely with the relevant consumer code to fully investigate the matter. In some cases, a dispute may need to be addressed by both organisations to ensure that they are fully resolved.

2.12. For more information and to contact the codes please see their contact details below:

- Home Insulation and Energy Systems Contractors Scheme (HIES): <https://www.hiesscheme.org.uk/>, or telephone number: 0344 324 5242
- Renewable Energy Consumer Code (RECC): <https://www.recc.org.uk>, or telephone number: 0207 981 0850

## 3. Eligibility requirements

### Section summary

This section sets out the requirements that installers, properties and installations must meet in order to be eligible to receive a BUS voucher and grant. It covers the criteria that all installations must meet, and the criteria that are specific to certain technologies. It also describes how installers need to evidence that the eligibility criteria have been met.

### Installer requirements

3.1. Installers must be **MCS accredited and certified** to install heat pumps or biomass boilers, or both, or certified by an MCS equivalent scheme.<sup>28</sup>

3.2. The Secretary of State is responsible for determining whether a scheme is equivalent to MCS. There are currently no schemes determined by the Secretary of State to be equivalent to MCS.

3.3. MCS installers need to create an account ahead of making any BUS voucher applications and voucher redemption applications. Please see chapter 4 for further information.

3.4. MCS installers may employ sub-contractors in line with the MCS standards.

3.5. The BUS voucher application must be submitted by an authorised user from the BUS installer account.

3.6. Installers **cannot use a temporary MCS certification number** to create an account or apply for a voucher. If installers are not MCS certified and wish to obtain MCS certification through an installation that they then intend to receive a BUS grant for, they need to complete the installation and gain certification before they can create an account and apply for a voucher which they can do retrospectively. If an installer installs and commissions a

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<sup>28</sup> The BUS regulations, Regulations 2 and 14

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heat pump or biomass boiler before they are granted a BUS voucher, they are doing so at additional risk.

3.7. Where this is the case, applications must be submitted and properly made no more than 120 days after the system has commissioned. If the application is properly made more than 120 days after it has been commissioned, it will not be eligible. Please see section 3.52 for more information on this.

3.8. If an installer’s **MCS certification expires or changes** after a BUS account has been created, we will not issue vouchers or make any redemption payments until the installer provides Ofgem with updated information.

3.9. Table 1 summarises the main eligibility criteria. These requirements are set out in more detail from paragraph 3.10 to paragraph 3.96. Applicants should make sure they read and fully understand all the eligibility requirements before making an application.

**Table 1 - Summary of general eligibility requirements**

Type of Eligibility	Description
<b>Installers</b>	Must be MCS <sup>29</sup> accredited and certified <sup>30</sup>
<b>Location</b>	Properties must be located in England or Wales.
<b>Type of building</b>	<ul style="list-style-type: none"> <li>• Domestic and non-domestic buildings are eligible</li> <li>• Social housing is not eligible</li> <li>• “Eligible self-builds” as defined in paragraph 3.23 are the only eligible new builds. New builds which form part of an “excluded property development” and/or which have been owned by a developer while they were built will not be eligible</li> </ul>
<b>Energy Performance Certificate</b>	<ul style="list-style-type: none"> <li>• Properties must have a valid EPC, (generated in the last 10 years) unless they are an eligible self-build</li> </ul>
<b>Previous heating system requirements</b>	<ul style="list-style-type: none"> <li>• The previous heating system (where applicable) must have been a fossil fuel heating system or an electric system (that does not include a heat pump)</li> </ul>

<sup>29</sup> Or equivalent scheme to the MCS

<sup>30</sup> The BUS regulations, Schedule 4



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Type of Eligibility	Description
	<ul style="list-style-type: none"> <li>• Certain heat generating components must be replaced.<sup>31</sup></li> </ul>
<b>Eligible technologies</b>	<ul style="list-style-type: none"> <li>• Air source heat pumps</li> <li>• Ground source heat pumps</li> <li>• Water source heat pumps</li> <li>• Ground source heat pumps as part of a shared ground source loop (SGL)</li> <li>• Biomass boilers.</li> </ul>
<b>Commissioning date</b>	<ul style="list-style-type: none"> <li>• The date on which the voucher application is properly made must not be more than 120 days after the eligible system has been commissioned</li> </ul>
<b>Capacity limit</b>	<ul style="list-style-type: none"> <li>• 45 kWth total capacity limit</li> <li>• This limit covers the vast majority of domestic and non-domestic properties.</li> <li>• The collective capacity limit for a BUS SGL system is 300kWth. Individual plants connected to the SGL must not exceed the 45kW limit.</li> </ul>
<b>Heat pump or biomass boiler system requirements</b>	<ul style="list-style-type: none"> <li>• Must meet the relevant standards published by the Secretary of State<sup>32</sup></li> <li>• Must provide heating for the purpose of both space heating and water heating</li> <li>• Must be capable of meeting the full space heating <b>and</b> hot water heating demands of the property</li> <li>• Must use a liquid to distribute heat</li> </ul>

## Property requirements

3.10. Only properties in England and Wales are eligible.

<sup>31</sup> See Table 2 for details as to which parts can and cannot be retained.

<sup>32</sup><https://www.gov.uk/government/publications/boiler-upgrade-scheme-regulations-approved-standards>

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3.11. Domestic and non-domestic properties are eligible. The eligibility requirements are the same for domestic and non-domestic properties.<sup>33</sup>

3.12. Properties must have a valid Energy Performance Certificate (EPC) (ie no more than 10 years old) unless they meet the definition of an eligible self-build set out in paragraph 3.23

3.13. Domestic and non-domestic properties include, but are not limited to, owner-occupied properties, properties rented out to tenants, second homes and holiday homes.

3.14. Properties such as churches and park homes may be eligible if an EPC can be issued on the basis that it is a property, and all other eligibility requirements are met.

### **Requirements for retrofit properties**

3.15. Where a property has had any previous heating system installed and was first occupied or used before the BUS funded installation was commissioned, the following requirements will apply. Separate requirements for eligible self-build properties are set out below from paragraphs 3.23 to 3.36.

### **Existing heating system requirements**

3.16. The previous heating system in the property, which is being replaced by the BUS funded installation, must have been **a fossil fuel-based heating system or an electric heating system** (not including heat pumps).<sup>34</sup>

3.17. We expect that, in limited cases, where the previous heating system has been disposed of, installers may need to seek evidence from property owners that the previous heating system was a fossil fuel or electric heating system. In these cases, installers should satisfy themselves that the previous heating system was eligible to be replaced with the support of a BUS grant. Evidence types that they may wish to consider in these cases include but are not limited to:

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<sup>33</sup> The BUS regulations, Regulation 5

<sup>34</sup> The BUS regulations, Regulation 5(1)(c)(ii)

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- a previous EPC<sup>35</sup> for the property that lists a fossil fuel or electricity as the main heating fuel
- previous bills or fuel delivery receipts
- evidence of a gas meter being removed
- documentation evidencing the gas connection to the property being capped or clamped
- photographic evidence of the previous heating system in situ and after removal

### **Energy Performance Certificates (EPCs)**

3.18. A **valid EPC** must be provided for the property at the voucher application stage, unless the property is an eligible self-build.<sup>36</sup> A valid EPC means the **most recent EPC** issued for the property and one which is **no more than 10 years old**.<sup>37</sup>

3.19. For information on Energy Performance Certificates please see the GOV.UK website<sup>38</sup> and for access to a property's EPC, please refer to the EPC register.<sup>39</sup>

### **Insulation Recommendations on an EPC**

3.20. From 8 May 2024, we accept EPCs with insulation recommendations. However, we expect that installers have a discussion with the property owner about the benefits of energy efficiency measures, such as cavity wall and loft insulation, and potential measures the property owner could take.

3.21. It is important that property owners understand that heat pumps perform best in a well-insulated property. Insulation measures, such as cavity wall and loft insulation, are relatively low-cost measures that could reduce energy bills and increase heat retention in a

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<sup>35</sup> <https://www.gov.uk/find-energy-certificate>

<sup>36</sup> The BUS regulations, Regulation 6

<sup>37</sup> The BUS regulations, Regulation 2(2)

<sup>38</sup> <https://www.gov.uk/buy-sell-your-home/energy-performance-certificates>

<sup>39</sup> <https://www.gov.uk/find-energy-certificate>

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property. For example, without loft insulation, around a quarter of heat is lost through the roof. These types of insulation help to keep heat inside the home, making it more comfortable and lowering heating costs.

3.22. More information around energy efficiency measures can be found on the government website.<sup>40</sup>

### **Requirements for Eligible self-build properties**

3.23. Properties which have not had any previous heating system installed and have not been occupied or used prior to commissioning of the eligible heat pump, will be assessed against the self-build eligibility requirements.

3.24. Self-builds can be eligible for BUS funding for heat pumps. Biomass boilers are not eligible for BUS funding in self-build properties.

3.25. Eligible self-builds include buildings where a builder is contracted by an individual to create a 'custom-build' or where a private individual builds the building as a DIY 'self-build' project. We'll refer to both of these types of properties as "eligible self-builds".

3.26. Self-builds only meet the eligibility requirements where all of the following criteria are met:

- The building was built principally with the use of the labour or resources of the first owner (including where the resource was a loan which the first owner was liable to repay)<sup>41</sup>
- The new building has not, while the building was built or at any subsequent time, been owned wholly or partly by a person who is not an individual<sup>42</sup>
- The building is not part of an "excluded property development"<sup>43</sup> An excluded property development means a development of multiple buildings constructed

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<sup>40</sup> [Energy Efficient Home - Invest to Save On Your Energy Bills \(energy-efficient-home.campaign.gov.uk\)](https://energy-efficient-home.campaign.gov.uk)

<sup>41</sup> The BUS regulations, Regulation 7(a)

<sup>42</sup> The BUS regulations, Regulation 7(b)

<sup>43</sup> The BUS regulations, Regulation 7 (1)

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on a plot acquired from a person who decided or offered the plans or specifications to which the buildings were wholly or mainly built<sup>44</sup>.

3.27. Properties built by development companies as part of a wider development, or which were owned by a company while they were built, do not meet the requirements outlined in paragraph 3.26, are therefore not eligible to receive BUS funding.<sup>45</sup>

3.28. Where an eligible self-build has transferred between owners ahead of a heat pump being installed or a BUS voucher application being made, additional evidence showing the chain of ownership will be required to ensure that the definition set out in 3.23 has been met.

3.29. If an installer is applying for a BUS grant for an eligible self-build, we request them to provide evidence on behalf of the property owner that it is an eligible self-build.

3.30. The evidence submitted must clearly show the name of the individual property owner associated with the voucher application, the site address, a description of the land and the date when the property ownership was transferred for us to be able to make an assessment on property eligibility.

3.31. Evidence provided must demonstrate that **both** the funding and ownership criteria noted above in paragraph 3.26 have been satisfied. Acceptable evidence to prove a building is an eligible self-build can include but is not limited to the below:

- proof of property ownership (eg a copy of title deeds, contract of sale, a letter from a solicitor, build contract)
- documents confirming a self-build VAT exemption, self-build loan or mortgage was received
- an invoice for substantial structural materials or labour (eg foundations or timber frame. Smaller works such as re-wiring or kitchen-fitting are not sufficient)
- invoices and/or contracts for builders or tradespeople
- bank statements demonstrating payment of invoices.

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<sup>44</sup> The BUS regulations, Regulation 7(2)

<sup>45</sup> The BUS regulations, Regulation 5(1)(d)

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3.32. This evidence must be uploaded via the mandatory upload functionality as part of the voucher application process. Files can be uploaded against one of two categories of evidence: funding of self-build or property ownership. There is a file size limit of 20mb, and files must be uploaded in PDF format.

3.33. If the eligible self-build does not have a confirmed address yet, we will accept a temporary address given by the local authority, approved planning reference number<sup>46</sup> or the coordinates of the property, provided that it is used consistently throughout the process.

3.34. An EPC is not required to be submitted in relation to eligible self-builds, as new self-builds are subject to the latest building regulations.

3.35. If a property was **converted** from a building used for **non-domestic purposes** (eg a barn or warehouse) **into a dwelling**, and it wasn't occupied by an individual before the low carbon heating system was installed, this is treated as a self-build provided the ownership requirements are met. Only properties that have never previously been used as a dwelling are considered to be a conversion.

3.36. **Renovations**, for example, where the property owner has stripped the building down to a shell and rebuilt it, are not classified as eligible self-builds. Renovations do not undergo a change from non-domestic to domestic usage or vice versa. These properties are treated as retrofit buildings and are therefore subject to the requirements set out in 3.15.

## **Grant funding**

3.37. There are restrictions on previous grant funding. An application is not eligible for BUS where:

- There has been a previous grant from public funds for a heat pump or biomass boiler installed at the same address.
- The eligible heat pump or biomass boiler being installed under BUS has also been promoted as a measure under the Energy Company Obligation (ECO) scheme.

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<sup>46</sup> Planning permission reference number and other planning evidence can only be used to confirm the address of the property. We will require additional evidence to confirm ownership and funding.

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- The eligible heat pump or biomass boiler being installed under BUS has received another grant from public funds for any of the costs of the purchase or installation of the eligible system.

## **Social housing**

3.38. Properties that are considered to be social housing, as defined in section 68 of the Housing and Regeneration Act 2008, are **not eligible**.<sup>47</sup>

3.39. Section 68 defines social housing as “low-cost rental accommodation”, meaning that it is made available for rent at below the market rate, and “low-cost home ownership accommodation”, meaning that the accommodation is occupied, or made available for occupation, in accordance with shared ownership arrangements, equity percentage arrangements, or shared ownership trusts. For both rental and home ownership accommodation, the accommodation is made available in accordance with rules designed to ensure that it is made available to people whose needs are not adequately served by the commercial housing market.

3.40. Properties that have undergone a sale through the “Right to Buy” scheme are not classified as social housing.

## **New heating system requirements**

### **General requirements**

3.41. Air source heat pumps, ground source heat pumps (including water source heat pumps and shared ground loops) and biomass boilers are the **eligible technologies**<sup>48</sup> under BUS. They must meet the requirements of the latest MCS standards, and the standards approved and published by the Secretary of State.<sup>49</sup> The following section sets out general requirements for all technologies. For technology specific requirements, please see the sections on heat pumps (paragraphs 3.64 to 3.82) and biomass boilers (paragraphs 3.83 to 3.88).

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<sup>47</sup> The BUS regulations, Regulation 5(1)(b)

<sup>48</sup> The BUS regulations, Regulation 3

<sup>49</sup> <https://www.gov.uk/government/publications/boiler-upgrade-scheme-regulations-approved-standards>

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3.42. The **maximum permitted capacity** of the system being installed is 45 kWth.<sup>50</sup> Shared ground loop systems have a maximum permitted capacity of 300 kWth for the whole system<sup>51</sup>. The capacity of individual heat pumps connected to a shared ground loop must not exceed 45 kWth.

3.43. Heat pumps and biomass boilers must **distribute heat using a liquid** (normally through radiators or underfloor heating) to provide both space heating and hot water.<sup>52</sup>

3.44. The heat pump or biomass boiler **must provide both space and hot water heating** to the property.

3.45. The heat pump or biomass boiler must be **capable of meeting the full space heating and hot water heating demands of the property** or to a single eligible property and any related property.<sup>53</sup> The new heating system can provide the partial or full heat needs of the related property, however, must provide the full needs of the main property. The installer will need to confirm this requirement is met via a declaration and we will check against the MCS certificate after the installation has commissioned.

3.46. A related property includes adjoining properties, such as an annex or swimming pool, which the owner of the property can use, and which are not covered by the first property's EPC.

3.47. 'Hot water heating demands of the property' refers to the **hot water intended for the personal use** of the individuals who use or occupy the eligible property. It is permitted for the heat pump or biomass boiler to also provide hot water for the purposes of heating a swimming pool or carrying out a process, but these hot water heating needs do not have to be met for the heat pump or biomass boiler to be eligible.<sup>54</sup>

3.48. The new low carbon heating system will need to **completely replace an existing fossil fuel heating system or electric heating system which does not include a heat**

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<sup>50</sup> The BUS regulations, Regulation 9(1)(b), Regulation 10(1)(b)

<sup>51</sup> The BUS regulations, Regulation 9(1)(b)

<sup>52</sup> The BUS regulations, Regulation 9(2)(a)(ii), Regulation 10(2)(a)(ii)

<sup>53</sup> The BUS regulations, Regulation 9(2)(b), Regulation 10(2)(b)

<sup>54</sup> The BUS regulations, Regulation 9(4)



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**pump.** Electric heating systems can include but are not limited to storage heaters, electric panel radiators and electric boilers. Certain heat generating components of the original heating system can be retained.<sup>55</sup> The BUS regulations allow for circulation pumps, solar thermal collectors, and supplementary electric heaters (including immersion heaters) to be retained. We do not consider wood burning stoves to be part of the original heating system and as such they may be retained. More detail on which parts can be retained is provided in Table 2.

**Table 2 – Parts that can and cannot be used before the heating system is first commissioned**

Heating system type	Heat generating parts that cannot be retained	Heat generating parts that can be retained	Other parts that can be retained
<b>ASHP</b>	Heat pump unit and compressor.	<ul style="list-style-type: none"> <li>• Immersion heaters for hot water</li> <li>• supplementary electric heaters</li> <li>• circulation pumps</li> <li>• wood burning stoves and</li> <li>• solar thermal collectors.</li> </ul>	<ul style="list-style-type: none"> <li>• Container and fixings</li> <li>• controls</li> <li>• pipes</li> <li>• emitters (eg radiators)</li> <li>• night storage heaters</li> <li>• hot water cylinders</li> <li>• buffer tanks or thermal stores</li> <li>• expansion vessels.</li> </ul>
<b>GSHP</b>	Ground or water loop. <sup>56</sup> Heat pump unit and compressor.	<ul style="list-style-type: none"> <li>• Immersion heaters for hot water</li> <li>• supplementary electric heaters</li> <li>• circulation pumps</li> <li>• wood burning stoves and</li> <li>• solar thermal collectors.</li> </ul>	<ul style="list-style-type: none"> <li>• Container and fixings</li> <li>• controls</li> <li>• pipes</li> <li>• emitters (eg radiators)</li> <li>• night storage heaters</li> <li>• hot water cylinders</li> <li>• buffer tanks or thermal stores and</li> <li>• expansion vessels.</li> </ul>

<sup>55</sup> The BUS regulations, Regulation 9(2)(c), Regulation 10(2)(c)

<sup>56</sup> The installation of a second or subsequent ground source heat pump as part of an existing shared ground loop system is allowed.

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Heating system type	Heat generating parts that cannot be retained	Heat generating parts that can be retained	Other parts that can be retained
<b>Biomass boiler</b>	Boiler.	<ul style="list-style-type: none"> <li>• Immersion heaters for hot water</li> <li>• supplementary electric heaters</li> <li>• circulation pumps</li> <li>• wood burning stoves and</li> <li>• solar thermal collectors.</li> </ul>	<ul style="list-style-type: none"> <li>• Fuel storage, preparation, or delivery equipment</li> <li>• fixings</li> <li>• controls</li> <li>• emitters (eg radiators)</li> <li>• night storage heaters</li> <li>• hot water cylinders</li> <li>• pipes</li> <li>• buffer tanks or thermal stores and</li> <li>• expansion vessels.</li> </ul>

3.49. Even if parts are retained, the heat pump or biomass boiler must still be capable of meeting the full space and hot water heating requirements of the property. In effect, this means that the heat pump or biomass boiler would be sufficient in size, and installed in such a way, that were the retained heat generating components not there, it would be able to heat and provide hot water to the property on its own.

3.50. Heat pump systems which use a combination of a fossil fuel boiler, and a heat pump are not supported under BUS.

**Commissioning Date eligibility:**

3.51. We recommend that installers wait until a voucher application has been made and the voucher issued before commissioning the eligible system at a property. However, we understand that in some circumstances, commissioning may occur prior to submitting a voucher application.

3.52. Where a system has been commissioned prior to submitting a voucher application, installers must ensure that the voucher application has been, or will be, properly made within 120 days of the commissioning date stated on the MCS certificate. A system that is commissioned more than 120 days before the date on which the voucher application is properly made will not be eligible on BUS,

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3.53. A voucher application is only considered 'properly made'<sup>57</sup> when we have received all the information required to assess the eligibility of a voucher application, including property owner consent.

3.54. Ofgem may grant an extension to the 120-day commissioning rule, in very limited circumstances, where the length of time taken to reach certain administrative decisions results (or is likely to result) in the 120-day period being exceeded for a re-application. Extensions may only be granted where Ofgem deems it reasonable to do so and where we assess that an application could be brought into compliance and re-submitted.

Ofgem may grant an extension:

- Where a voucher application has been rejected<sup>58</sup>
- Where a voucher redemption has been rejected<sup>59</sup>
- Where a voucher has been revoked<sup>60</sup>
- Where a sanction has been revoked<sup>61</sup>
- Where Ofgem take a decision regarding a right of review<sup>62</sup>

3.55. Commissioning occurs when the installer has tested and signed off on the installed low carbon heating system. A low carbon heating system is first commissioned upon the completion of procedures and tests undertaken to the usual industry standards and practices for the specific type of system which demonstrate that the system is capable of operating and generating heat. We will usually accept the first commissioning date stated on the MCS installation certificate.

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<sup>57</sup> The BUS regulation, Regulation 2

<sup>58</sup> The BUS regulations, Regulation (15(7), (8))

<sup>59</sup> The BUS regulations, Regulation (16(8))

<sup>60</sup> The BUS regulations, Regulation (21(1))

<sup>61</sup> The BUS regulations, Regulation (23)

<sup>62</sup> The BUS regulations Regulation (25(5))

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3.56. In line with MCS standards, it is permissible for the heating system to be installed and used in limited circumstances (eg, for drying out plasterwork during construction or renovation works) before the system is formally commissioned.

### **Ofgem PEL**

3.57. The Ofgem Product Eligibility List (PEL) is an administrative tool that makes it easier to identify products that could be eligible for the BUS. All products on the Ofgem PEL are extracted from the MCS certified product directory, where they also meet the MCS standards required by BUS. The MCS standards required by BUS are approved by Secretary of State as set out under the BUS regulations<sup>63</sup>.

3.58. The PEL only identifies products that meet the MCS standards and, in the case of biomass boilers, have an eligible emissions certificate. There are many other eligibility requirements under BUS, including technology specific technical requirements, and the PEL does not ensure compliance with these requirements. All BUS eligibility requirements are outlined in the BUS regulations and Ofgem’s guidance. Installers are responsible for making sure installations meet these eligibility requirements and must not rely on the PEL alone. There may be cases where a product is on the PEL, due to meeting the MCS standards requirement, but ineligible for BUS for a different reason. Where this is the case, we will reject the application.

3.59. The PEL does not consider the SCOP of heat pumps. Installers need to calculate this separately. The Ofgem PEL is not exhaustive – there may be some products on the MCS certified product directory that do meet the requirements for BUS but are not on the Ofgem PEL.

3.60. Where MCS standards as approved by DESNZ have been updated, the relevant standards at the time of commissioning will be used to assess eligibility.

3.61. The PEL is updated on a monthly basis.

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<sup>63</sup> The BUS regulations Regulation 4

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3.62. In order to be listed on the PEL, MCS certified biomass boilers also require an emissions certificate meeting the scheme air quality requirements<sup>64</sup>. For MCS certified biomass boilers that are not on the PEL due to a missing emissions certificate, an eligible emissions certificate<sup>65</sup> will need to be submitted as part of a voucher redemption process. If we are satisfied it meets the requirements, we will update the PEL.

3.63. Ofgem will not be adding **new heat pumps or biomass products** to the PEL at the request of manufacturers or suppliers. **Only heat pumps or biomass products and emissions certificates that are submitted as part of a voucher redemption application will be reviewed.**

## Heat pump specific requirements

3.64. Air-source, ground-source and water-source heat pumps are eligible for the scheme.<sup>66</sup>

3.65. Heat pumps must **have a compressor which is driven by electricity**.<sup>67</sup> Heat pumps with compressors driven by gas are not eligible.

3.66. Heat pumps must have a **seasonal coefficient of performance (SCOP) of at least 2.8**.<sup>68</sup> This must be calculated in accordance with the MCS SCOP calculator (MCS026).<sup>69</sup> We will check the SCOP value of an installation against the MCS installation certificate.

3.67. Electricity and heat metering is not required for BUS but may be included as part of the system if desired.

## Air-source specific requirements

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<sup>64</sup> Paragraph 3.91

<sup>65</sup> The BUS regulations, Schedule 1

<sup>66</sup> The BUS regulations, Regulation 2(1) – definition of “heat pump”

<sup>67</sup> The BUS regulations, Regulation 9(1)(e)

<sup>68</sup> The BUS regulations, Regulation 9(1)(d)

<sup>69</sup>[https://mcs-certified.com/wp-content/uploads/2019/10/MCS\\_026\\_SCOP\\_SSHEE\\_Model\\_V1\\_0\\_FINAL\\_unlocked.xlsx](https://mcs-certified.com/wp-content/uploads/2019/10/MCS_026_SCOP_SSHEE_Model_V1_0_FINAL_unlocked.xlsx)

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3.68. ASHPs must generate heat using a thermodynamic cycle by transferring energy stored in the form of heat in the ambient air outside a property and use that energy to heat a liquid.

3.69. ASHPs designed to use exhaust heat (residual heat which has been expelled from an appliance or building), for example building ventilation systems and air-to-air heat pumps, are not eligible.<sup>70</sup>

### **Ground-source specific requirements**

3.70. GSHPs must generate heat using a thermodynamic cycle by transferring energy stored in the form of heat from the ground, including water in the ground or surface water or both, and use that energy to heat a liquid.

3.71. The ground loop is the equipment which absorbs energy in the form of heat in the ground, including heat in water in the ground or surface water. This is the heat generating component of a GSHP and must be new (see Table 2).

3.72. GSHPs as part of a **shared ground loop system** are eligible. A ground loop is shared when two or more GSHPs receive the heat from the same loop through a hydraulic connection. Shared air loop systems are not eligible on the scheme. The ground loop in relation to the second or subsequent GSHP forming part of the system does not have to be new.<sup>71</sup> The capacity of individual heat pumps connected to a shared ground loop must not exceed 45 kWth and the overall system capacity for any shared ground loop system must not exceed 300 kWth.

### **Hybrid heat pumps**

3.73. Some heat pumps can be categorised as “hybrid products”. These are heat pumps which are designed to work with or are integrated with another technology type. If your heat pump is installed as a hybrid, then it is unlikely to be eligible to apply for BUS. Some systems that can be installed as a hybrid may be eligible if they are installed as a standalone unit and replace an existing system. Upon receiving an application, we will assess the product against the criteria set out in the regulations to determine if it is eligible. While we cannot provide an

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<sup>70</sup> The BUS regulations, Regulation 9(1)(f)

<sup>71</sup> The BUS regulations, Regulation 9(1) (a)

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up-front assessment of eligibility for each and every product, we have provided a non-exhaustive list of example hybrid systems below.

3.74. **Integrated fossil fuel hybrid systems:** Heat pump systems which include an integrated fossil fuel boiler do not meet the definition of air source or ground source heat pumps given in the regulations.<sup>72</sup> Therefore, they are ineligible for BUS. Examples include gas and oil boilers. This list is not exhaustive.

3.75. **Fossil fuel hybrid compatible systems:** Heat pumps which have the capability to be installed alongside a fossil fuel boiler may be eligible for BUS. They must be installed independently of a fossil fuel boiler. Installations which comprise both a heat pump and a fossil fuel boiler are ineligible.

3.76. **Solar photovoltaic (PV) compatible systems:** Heat pumps which can be installed to integrate a solar PV product may be eligible for BUS. Typically, the solar PV installation only contributes to the electrical input required of the heat pump and does not directly generate heat.

### **Cascade systems**

3.77. Cascade systems can be eligible under BUS, but **only one voucher maybe issued for a cascade system**. Cascade systems are systems that serve the hot water and space heating needs of a single eligible property (or that property and a related property) and are made up of **more than one heat pump**. For example, two hydraulically linked air source heat pumps serving just one property would constitute a cascade system.

3.78. The following cascade system setups may be eligible on BUS, **provided that they serve only an individual property (or an individual property and a related property)**.<sup>73</sup>:

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<sup>72</sup> The BUS regulations, Regulation 2(1)

<sup>73</sup> The BUS regulations, Regulation 2(1) - a heat pump means a plant which is an air source heat pump, **or** a ground source heat pump, or both.

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3.79. **Air source and air source heat pumps:** Heat pump systems which are comprised of two or more air source heat pumps. The total capacity of the system must not exceed 45kwth.

3.80. **Ground source and ground source heat pumps:** Heat pump systems which are comprised of two or more ground source heat pumps. The total capacity of the system must not exceed 45kwth. This setup is distinct from a shared ground loop system because all heat pumps are providing heat to the same property, as opposed to one property each.

3.81. **Air source and ground source heat pumps:** Heat pump systems which are comprised of both air-source and ground-source heating <sup>74</sup>. The total capacity of the system must not exceed 45kwth.

3.82. **Only one MCS certificate should be generated in respect of a cascade system application. This should be provided to Ofgem at the voucher redemption stage.**

## Biomass boilers

3.83. Biomass boilers must be designed and installed to burn **solid biomass** and to minimise heat loss to the immediate area in which they are installed. Solid biomass means material, other than fossil fuel or peat, which is, or is derived directly or indirectly from, plant matter, animal matter, fungi, or algae.<sup>75</sup> Usually this will be wood chips or wood pellets.

3.84. Biomass boilers **must use liquid to deliver heat**<sup>76 77</sup>

3.85. Biomass boilers may include a cooking function, providing that cooking function cannot be controlled independently of the heating or hot water.

3.86. Biomass stoves which are designed and installed to burn wood pellets to generate heat which is radiated directly into the room in which it is installed are not eligible.

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<sup>74</sup> The BUS regulations, Regulation 2(1) - a heat pump means a plant which is an air source heat pump, or a ground source heat pump, or both.

<sup>75</sup> Section 100 of the Energy Act 2008: <https://www.legislation.gov.uk/ukpga/2008/32/section/100>

<sup>76</sup> The BUS regulations, Regulation 10(2)(a)(ii)

<sup>77</sup> The BUS regulations, Regulation 2(1) – definition of a “biomass boiler”



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3.87. Biomass boilers **may not replace a system that is fuelled by mains gas**.<sup>78</sup> Properties that have a capped or clamped gas supply will also not be eligible to have a biomass boiler installed with BUS support. Before the installer applies, they should satisfy themselves that the property is not connected to the gas grid.<sup>79</sup>

3.88. **Biomass boilers** installed in self-builds are not eligible. Buildings considered 'eligible self-builds' for the purposes of the scheme are defined in paragraph 3.23.

### Location of property

3.89. Biomass boilers may only be installed in properties in **rural areas**.<sup>80</sup> The BUS regulations specify that for the purposes of the scheme, we must use the Office for National Statistics (ONS) definition of rural. The ONS classifies areas as rural if they are outside of settlements with populations exceeding 10,000 people.<sup>81</sup> We verify this using the ONS Rural/Urban classification tool by cross-referencing the address provided to determine a property's rural or urban status.

3.90. Installers can check if a property is classified as rural or urban by using the ONS database. Websites such as <https://findthatpostcode.uk/> facilitate an easy search of the database. The classifications, and determination of rural/urban are set out in Table 3.

**Table 3 – Rural-urban classification**

Rural/urban	Description	Classification
Urban	Major Conurbation	A1
Urban	Minor Conurbation	B1
Urban	City and Town	C1
Urban	City and Town in a Sparse Setting	C2
Rural	Town and Fringe	D1
Rural	Town and Fringe in a Sparse Setting	D2
Rural	Village	E1

<sup>78</sup> The BUS regulations, Regulation 11(b)

<sup>79</sup> The BUS regulations, Regulation 11(c)

<sup>80</sup> The BUS regulations, Regulation 11(a)

<sup>81</sup> The BUS regulations, Regulation 2(1) – definition of an "urban area"

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Rural/urban	Description	Classification
Rural	Village in a Sparse Setting	E2
Rural	Hamlets and Isolated Dwellings	F1
Rural	Hamlets and Isolated Dwellings in a Sparse Setting	F2

### Air quality

3.91. Biomass boilers must have an **emissions certificate** that shows emissions of particulate matter did not exceed 30g/GJ net heat input, and emissions of NOx did not exceed 150 g/GJ net heat input at the time of testing<sup>82</sup>. Independent of the BUS regulations, biomass boilers are legally required to meet local and national environmental permit requirements or rules.

### Fuel sustainability and quality

3.92. It is not a requirement in this scheme to only burn approved sustainable fuel listed on the Biomass Suppliers List (BSL)<sup>83</sup>. Nor is there any requirement in this scheme to use fuel of a certain quality. However, as per the MCS Biomass Standard, MIS 3004, the installer should provide information to the property owner about the specification of the intended fuel in writing before a contract is awarded.

3.93. This information should contain the fuel to be used as specified in the manufacturer’s instructions. In most cases, fuel should be sourced from a supplier listed on the BSL, which ensures it meets sustainability and quality requirements. The emissions certificate for the biomass boiler must contain a list of the types of fuel which can be used so as to ensure that emissions limits are not exceeded.

### Maintenance

3.94. In order to operate an efficient biomass installation, **regular maintenance is recommended**. Whilst not an obligation under the BUS, manufacturers may require regular

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<sup>82</sup> The BUS regulations, Regulation 10(1)(d), Schedule 1

<sup>83</sup> <https://biomass-suppliers-list.service.gov.uk/>

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maintenance be undertaken to ensure the product warranty is valid. Where maintenance of biomass boilers is undertaken, it should be undertaken to the latest MCS standards.

3.95. The installer should provide the **boiler’s maintenance requirements** to the property owner.

3.96. Table 4 sets out the additional technology specific requirements.

**Table 4 – Technology specific requirements**

Requirement	Heat Pumps	Biomass Boiler
<b>Location</b>	Urban and rural properties within England and Wales.	Rural properties only within England and Wales.
<b>Properties</b>	Can be installed in an eligible self-build.	Cannot be installed in an eligible self-build.
<b>Gas grid connection</b>	Property can be on or off the gas grid.	Cannot be installed in a property on the gas grid or a property with a capped or clamped gas supply.
<b>Other</b>	Must use a compressor driven by electricity.	Must comply with air quality requirements. See paragraph 3.91

## 4. BUS installer accounts

### Section summary

This section contains information about the purpose and functionality of installer accounts. It also details the responsibilities of the account's authorised representative, the roles of different account users and how to set up an account.

### What is an account?

4.1. Account creation is a necessary first step before being able to submit voucher applications. We will need to process account creation requests, so we encourage installers to create an account at least 2-3 weeks ahead of expecting to submit a voucher application.

4.2. Installer accounts can be created at any time during the lifetime of the scheme and are limited to one account per installer at a time.

4.3. Creating an account will allow installers to:

- Receive a unique account ID via email which will be referenced on all applications made to the scheme
- Manage account details, such as:
  - Business information
  - Information related to the authorised representative
  - Account user information and permissions and add additional users for the organisation
- Create a secure log in to access the digital account area once approved for participation on the scheme
- Create and submit applications

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- View all voucher applications in their account area and the status of each, once they have registered and logged into their digital installer account area
- Upload relevant supporting PDF documents on the digital BUS portal
- Manage existing voucher and redemption application details such as:
  - Cancel Voucher Applications
  - Cancel Issued Vouchers
  - Reapply for cancelled Applications/Vouchers

4.4. The BUS installer account is purely for administrative purposes. Ofgem will not be publishing a list of approved or accredited BUS installers. However, MCS have a find an installer<sup>84</sup> tool on their website and the option to filter for installers that have created a BUS Account. Installers who created a BUS account with Ofgem after April 2022 and have retrospectively confirmed their consent to have their name shared with MCS will be found on this list. If you are an installer with a BUS account and think you should appear on this MCS list, please contact us on [BUS.Installer@ofgem.gov.uk](mailto:BUS.Installer@ofgem.gov.uk) . It can take up to 21 days from point of activation for the update to reflect on the MCS website.

4.5. Consent will be collected during account creation from November 2022 onwards and these installers will be added to the MCS list automatically.

4.6. Making an account does not guarantee that any BUS voucher applications will be successful when they are submitted.

## **Who can create an account?**

4.7. Only MCS certified installers will be eligible to create an account. The installer will need to be fully certified and provide their MCS number as part of the account creation process.

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<sup>84</sup>[Find a Contractor - MCS \(mcscertified.com\)](https://www.mcscertified.com)

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The installer must be certified to the relevant standards for installing heat pumps and/or biomass boilers as published by the Secretary of State.<sup>85</sup>

4.8. The installer must be a member of an approved consumer code as published by the Secretary of State<sup>86</sup>. The installer must provide their membership number to the approved consumer code.

## **Authorised representative**

4.9. The individual setting up the account becomes the authorised representative and is legally responsible for the activity undertaken by the account.

4.10. Accounts can be set up for both registered companies and other entities, such as sole traders.

4.11. To set up an account, the authorised representative elect needs to complete and submit an account creation form. As part of completing the account creation form, we require authorised representatives to provide personal information that allows us to run identity checks.

4.12. Only the authorised representative can make a request to add and edit the company details, such as business address and bank account details. We do not anticipate these types of details changing often. These details are verified when they are added and if they are changed.

4.13. Any changes are confirmed via email to the email address provided by the authorised representative at account set-up. This must be an email address that can only be accessed by themselves for the reasons set out in paragraph 4.11.

## **Installer company accounts**

4.14. Where the installer is a company, we require that the individual setting up the account is someone with the legal authority to act on the company's behalf. This person may

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<sup>85</sup><https://www.gov.uk/government/publications/boiler-upgrade-scheme-regulations-approved-standards>

<sup>86</sup> <https://www.gov.uk/government/publications/boiler-upgrade-scheme-regulations-approved-standards>

**This guidance applies to applications submitted on or after 8 May 2024.**

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be a company director or company secretary, and this is checked against information held on Companies House. This person will be the authorised representative when the account is created.

4.15. Authorised representatives can add and remove additional users to the account and allocate each user with the relevant user permissions (See Table 5).

4.16. The authorised representative needs to confirm on the company's behalf that the company takes responsibility for the activity undertaken by additional users. This negates the need for companies to provide separate 'letters of authorisation' to appoint key account contacts.

4.17. If the installer is a limited company, the authorised representative must be listed as active under the 'People' tab of the Companies House record for the business. This information can be found online.<sup>87</sup>

4.18. After an account has been set up, if installers want to change the authorised representative, the existing authorised representative needs to complete the relevant account amendment form available on our website and email it to [BUS.accountcreation@ofgem.gov.uk](mailto:BUS.accountcreation@ofgem.gov.uk).<sup>88</sup> The proposed new authorised representative needs to be registered on Companies House and undergo the relevant identity and verification checks for the change to be successful.

### **Sole traders**

4.19. If the installer is a sole trader, they will not be registered on Companies House. However, the sole trader must complete the *About You* section so that we can verify their identity. Where the installer is a sole trader, we require that the individual setting up the account is someone with the legal authority to act on behalf of the sole trader.

4.20. The authorised representative has all the available user permissions set out in Table 5 by default and will be the only user with *account management* permission. They will also be

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<sup>87</sup> <https://find-and-update.company-information.service.gov.uk/>

<sup>88</sup> <https://www.ofgem.gov.uk/publications/boiler-upgrade-scheme-installer-account-amendment-forms>

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the account representative that we would contact should we have questions or concerns related to activity on the account.

## How do I create an account?

4.21. Account creation submissions are made using a form that needs to be submitted to us via email. This will be only accepted from the authorised respective elected on the business, and from the email address listed on the account creation form.

### Account creation form

4.22. The installer account creation form is available on the Ofgem website.<sup>89</sup>

4.23. The installer account creation form is an editable PDF. We also provide an accessible Word document for those who require it.

### What is needed to create an account?

4.24. The authorised representative should ensure that they have the documents needed before they start the account creation process. This is so that the information and documents provided to us are up to date, avoiding delays in the setting up of the account.

4.25. Authorised representatives should provide their name and date of birth as it appears on the **identity** document they provide to us. They must provide a clear, digital copy of **one** of the following:

- the full signature and photo page of their valid passport
- their valid UK driving licence (photocard or paper)
- their current UK firearms certificate or shotgun licence
- their current national identity card

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<sup>89</sup> <https://www.ofgem.gov.uk/publications/boiler-upgrade-scheme-installer-account-form>



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4.26. In order to show proof of their **home address**, authorised representatives must provide a clear, digital copy of **one** of the following:

- a domestic utility bill from the last three months
- Personal bank letter or statement showing the home address
- a council tax bill from the last three months

4.27. In order to provide evidence of the **bank account** of their business, authorised representatives must provide a digital copy of a business bank statement from the last three months which includes the bank account correspondence address. Bank accounts must be UK accounts that accept British pound sterling.<sup>90</sup>

4.28. The following must be included:

- business name
- business address
- sort code
- account number

4.29. We require these documents so that we can run the necessary identity and verification checks to set up the installer account and reduce any future risk that vouchers are paid incorrectly.

4.30. Digital copies (including those produced using a scanner) of these documents should be attached to the same email as the completed account creation form and sent to [BUS.accountcreation@ofgem.gov.uk](mailto:BUS.accountcreation@ofgem.gov.uk). All digital files must be sent in PDF format.

4.31. We cannot receive emails that are greater than 35MB in size.

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<sup>90</sup> The BUS regulations, Schedule 2, 2(e)

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4.32. We aim to check the information provided and open accounts in a timely manner.

4.33. In the event that we require additional information to verify and create the account, we will inform the authorised representative and they will have 14 days to provide us with these.

4.34. If we do not receive the additional information requested within 14 days, we may reject the application.

4.35. Digital copies of the proof of ID and proof of home address documents you submit will be deleted when we no longer need them for our verification purposes. This will be three months from the date we review them.

4.36. Your personal information is deleted when we no longer need it for our functions in administering the BUS. As such, it is retained by Ofgem for the duration of the scheme, and for a period of seven years thereafter.

## Users

4.37. An installer can add users to the BUS account to manage and submit voucher applications and voucher redemption applications on their behalf. The authorised representative needs to confirm on the company's behalf that the company takes responsibility for the activity undertaken by additional users.

4.38. Authorised representatives and those with user management permissions can complete and download an account amendment form to add, edit or remove any users. This can be emailed to [BUS.installer@ofgem.gov.uk](mailto:BUS.installer@ofgem.gov.uk). Details of this process can be found in the 'Manage Account' section of the digital portal.

4.39. Additional users must be direct employees of the registered MCS installer. Sub-contractors are not allowed to be added as additional users.

4.40. We require the following information to add additional users to an account:

- first name and surname
- email address

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- telephone number

4.41. The email address provided must be an individual’s email account and not one that is accessed by multiple people such as a team or general inbox.

4.42. When new users are added to the account, they are automatically provided with standard user permissions unless *user management* permission is specifically requested for them. The authorised representative should carefully consider which users (if any) are given user management permissions and there can be a maximum of 5 users on an account with user management permissions.

4.43. The permissions of users can be amended at any time by those with user management permissions.

Table 5 sets out the different user permission levels that can be assigned to users of a BUS installer account.

**Table 5 - User permission levels**

Permission	Description
<b>Account management (Only for authorised representative)</b>	Ability to: <ul style="list-style-type: none"> <li>• create an account</li> <li>• update key information about the company such as bank details, MCS certification number, business company number, business registered name, business trading name and registered address</li> <li>• add additional users to the account</li> </ul> They also have all the permissions that apply to the other user types.
<b>User management (Maximum of 5 users)</b>	Ability to: <ul style="list-style-type: none"> <li>• add additional users to the account</li> <li>• set and update permission levels for users (other than the authorised representative)</li> <li>• remove users from the account (other than the authorised representative)</li> </ul> They also have all the permissions that apply to the standard users.
<b>Standard user</b>	Ability to: <ul style="list-style-type: none"> <li>• submit new voucher applications</li> <li>• edit and manage existing voucher applications</li> </ul>

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Permission	Description
	<ul style="list-style-type: none"><li>• Redeem or cancel issued vouchers</li><li>• re-apply for applications where a voucher may have expired</li></ul>

## Account Maintenance

4.44. The authorised representative is responsible for advising us of any changes to:

- bank details
- contact details and changes to company address
- nominating a new authorised representative for the account if they are leaving
- removal of users who have left the business<sup>91</sup>
- To advise us of any of the above changes, please email the account amendments form (published separately) to [BUS.accountcreation@ofgem.gov.uk](mailto:BUS.accountcreation@ofgem.gov.uk)<sup>92</sup>

## Assisted Digital

4.45. If someone requires digital assistance to complete the forms, we can provide a backup journey to enable account creation, voucher applications and voucher redemption applications. If this is needed, please get in contact via [BUS.installer@ofgem.gov.uk](mailto:BUS.installer@ofgem.gov.uk).

4.46. Ofgem will provide a Welsh translated service where the installer requests this.

4.47. Once installers have completed our scheme registration process as set out in paragraphs 4.1 to 4.36, and passed our verification checks, their details will be entered onto our register of BUS installers.

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<sup>91</sup> This may also be done by a user with appropriate level of permission.

<sup>92</sup> <https://www.ofgem.gov.uk/publications/boiler-upgrade-scheme-installer-account-amendment-forms>

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4.48. If an installer no longer wishes to participate in the BUS scheme, the authorised representative should contact us in writing via email to [BUS.Installer@ofgem.gov.uk](mailto:BUS.Installer@ofgem.gov.uk) to withdraw the account from the scheme register. Should the same installer wish to reapply in future, they must follow the process as set out in paragraphs 4.1 to 4.36.

4.49. Installers who no longer meet the criteria to be part of the scheme may be temporarily suspended from the scheme register until they are able to demonstrate they meet the criteria again. Where installers do not demonstrate an intention to comply with the scheme criteria, they may be removed from the scheme register by Ofgem. In advance of any de-registration, we will write to the authorised representative of any affected to explain our related process. This communication will request the installer provides us with any outstanding information within 14 days. If an installer does not comply with this information request, we may suspend them from the scheme register.

4.50. It is open to any removed installer to reapply to be entered on the scheme register. This will require completion of a full new application process as set out in paragraphs 4.1 to 4.36 above.

4.51. Where an installer is suspended from the register, and a BUS voucher has been issued we have the power to revoke or “take back” vouchers as set out in paragraphs 9.25 to 9.27.

## 5. Voucher applications and voucher redemption applications

### Section summary

This chapter outlines the process for an installer to make a voucher application and the information and documentation required at each stage. It also sets out how property owner consent is obtained, and how a voucher redemption application should be submitted. It also outlines how an application can be withdrawn.

5.1. Once the installer has a BUS installer account set up, they can make applications.

5.2. The grant application is a two-stage process as set out in Figure 1 below. Installers are required to submit a voucher application (stage 1)<sup>93</sup> and a voucher redemption application (stage 2).<sup>94</sup>

5.3. Installers are required to submit supporting evidence to verify key eligibility criteria as part of the application process. All eligibility information and supporting evidence is mandatory and required for applications to be able to be submitted. It is the responsibility of the installer to gather and upload any supporting PDF documents to the BUS Portal as part of their application, not the property owner.

5.4. Our communication relating to all applications are digital and via email by default.

5.5. Where a property owner has a genuine concern or needs to provide evidence directly to us rather than via their installer, for example sensitive documents such as bank statements or mortgage documents, they are able to do so. Please contact us at [BUS.propertyowner@ofgem.gov.uk](mailto:BUS.propertyowner@ofgem.gov.uk) if you need assistance with this.

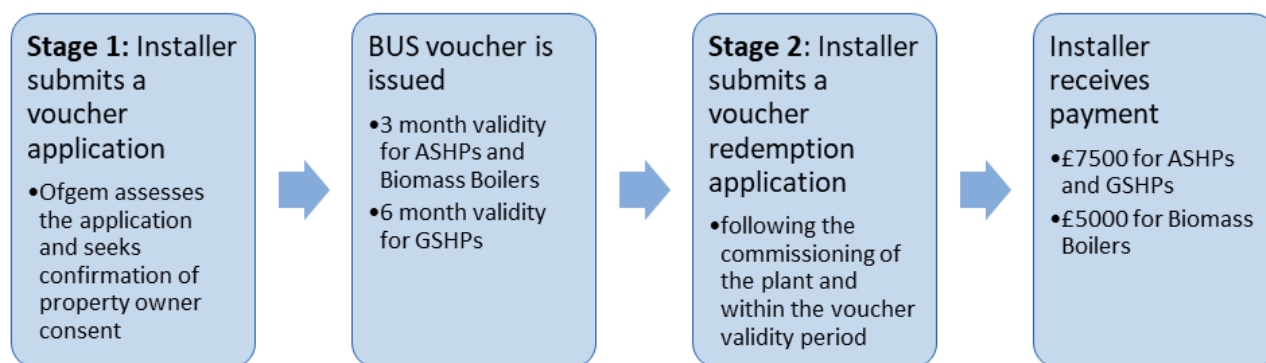
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<sup>93</sup> The BUS regulations, Regulation 14

<sup>94</sup> The BUS regulations, Regulation 16

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**Figure 1 – Application process overview<sup>95</sup>**



5.6. Ahead of making a voucher application, the installer should:

- have an agreement with the property owner to submit a BUS voucher application for an installation of a heat pump or biomass boiler at a property they own.
- provide the property owner with a quote for the installation.
- carry out an on-site assessment by carrying out a site visit and be satisfied that the property and technology choice meet all of the eligibility requirements set out in chapter 3.
- have a discussion with the property owner about the benefits of energy efficiency measures, such as cavity wall and loft insulation, and potential measures the property owner could take.
- inform the property owner that we will be contacting them regarding the BUS voucher application and that they will be asked to confirm they have consented to a BUS voucher application being made.

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<sup>95</sup> Assuming eligibility is met, and a voucher application is successful.

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- inform the property owner that we will verify their identity and that they will be asked to confirm their identity (this may include the property owner sending digital copies of ID documents to us).
- inform the property owner that we may request access to their property for audit purposes.

## Stage 1: Voucher Application

Figure 2 – Stage 1, voucher application process



5.7. The first stage of the BUS application process is the voucher application. Installers can create and submit voucher applications online via the digital BUS portal.<sup>96</sup>

5.8. The installer is required to provide the **information and associated evidence** to demonstrate that the eligibility criteria are met when making a voucher application.<sup>97</sup> This is summarised in the following list.

- the installation address of the property
- the property owner's name, email address (if they have one), telephone number and home address (if different from the installation address)<sup>98</sup>

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<sup>96</sup> <https://boiler-upgrade-scheme.service.gov.uk>

<sup>97</sup> The BUS regulations, Schedule 2

<sup>98</sup> Where the property is owned by an organisation rather than individuals, installers should give the details of an individual who can legally represent the organisation, eg a director or company secretary.



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- technology type being installed: ASHP, GSHP, GSHP as part of a shared ground loop, or biomass boiler
- the fuel type of the heating system being replaced at the property (if applicable)
- confirmation of whether the property is connected to the gas grid
- whether the property is an eligible self-build as defined in 3.23 and if so evidence to demonstrate this
- the unique reference number for the latest EPC related to the property, except for eligible self-builds
- declaration that the property is not social housing
- details of the quote the installer has agreed with the property owner

5.9. If the property owner is an organisation, please provide an email address and telephone number of an individual who can legally represent the organisation, eg a director or company secretary.

5.10. If the property owner does not have an email address, details of the assisted digital consent process are set out in paragraph 5.38.

## **Quotes**

5.11. Installers are required to provide customers with a quote as part of the MCS process. We are required by the BUS regulations to collect information on the quote provided by an installer to a property owner for the technology being applied for.

5.12. Please ensure that the values submitted match the quote that you have issued to the property owner. We may verify this as part of an audit against the quote reference number provided.

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The installer is required to submit the following details of the quote they've agreed with the property owner as part of the voucher application process:<sup>99</sup>

- the total quote amount, including any VAT, before the grant is deducted. This figure is to include any ancillary components, labour costs and other costs associated with the job quoted
- the total cost of the heat pump unit or biomass boiler unit (without the grant deducted)
- the quote reference number, which is the installer's internal reference for the quote
- the date on the quote

5.13. We allow quotes to be final or provisional since we recognise costs may change over a project lifetime. The installer does not need (unless we state otherwise) to update us with changes to project costs that occur after they have submitted quote details to us.

5.14. In the case of shared ground loops, where a single quote may cover multiple installations, applicants are permitted to provide the same quote for multiple voucher applications. In these cases, the installer may wish to explain to property owners the extent of what the "Total quote amount" relates to as we will confirm the property owner recognises the quote amount at property owner consent stage as set out in 5.26.

5.15. The installer must retain a copy of any information relied on when making voucher applications and voucher redemption applications for six years from the date on which they were made.<sup>100</sup> This includes the quote details submitted as part of the voucher application.

### **Property owner consent**

5.16. Once the installer has submitted a voucher application to us, we will contact the property owner using the email address provided to confirm that they have consented to a

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<sup>99</sup> The BUS Regulation, Schedule 2, 2(k)

<sup>100</sup> The BUS regulations, Regulation 17(1)(a)

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BUS voucher application being made for their property.<sup>101</sup> It is not intended to duplicate or recreate any contractual arrangements that an installer and property owner have in place.

5.17. Consent is asked for only once and is obtained at the voucher application stage. Consent is not asked for at the voucher redemption stage.

5.18. The email to property owners is sent from the email address [boiler.upgrade.scheme.ofgem@notifications.service.gov.uk](mailto:boiler.upgrade.scheme.ofgem@notifications.service.gov.uk).

5.19. Where there are multiple owners for the same property, we only need the details and confirmation of consent from one of the owners. However, that confirmation must state that the property owner that is giving consent on behalf of the other(s) has the authority to do so.

5.20. Where the property is owned by an organisation rather than individuals, installers should give the details of an individual who can legally represent the organisation, eg, a director or company secretary.

5.21. We have a Letter of Authorisation (LOA) on our website which must be used if the property is owned by an organisation not listed on Companies House. We will require consent from an individual. Table 6 below shows the signatory of the LOA and the authority we will accept.

**Table 6 - Signatories of the LOA**

Property owner	Signatory
Company (if not listed on Companies House)	Director or Company Secretary
Charity	Trustee
School (if not Ltd company or charity)	Headteacher
Trust	Trustee
Place of worship (if not Ltd company or charity)	Religious leader of the place of worship

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<sup>101</sup> An assisted digital route using a telephone number and paper letter will be available for those property owners who are unable to access the digital system or do not have an email address. Details on this can be found in the BUS guidance for property owners: <https://www.ofgem.gov.uk/publications/boiler-upgrade-scheme-guidance-property-owners>.

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Property owner	Signatory
Housing association	Director

5.22. In cases of shared ground loop applications, where there are multiple properties being connected to a single ground loop, we require the installer to submit a separate voucher application for each property that intends to connect to the ground loop. We require consent from the owner of each property that intends to connect to the loop.

5.23. We (or an agent appointed by us) verify the identity of the property owner using the information provided to us as part of the voucher application. Where we require additional information to verify the property owner identity, we will seek this directly from the property owner.

5.24. Property owners are required to confirm:<sup>102</sup>

- their full name
- key project details, including the installation address, proposed low carbon heating system and project cost given in the installer’s quote
- that they own (or co-own) the property at the installation and, where there are multiple owners of a property, that the person providing consent is acting with the agreement of all other owners
- that they consent to the installer making a BUS voucher application
- that they will become the owner of the low carbon heating system upon completion of the installation
- the property is not social housing

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<sup>102</sup> The BUS regulations, Regulation 14(2)

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- they have not received other support from public funds or government schemes, such as the Energy Company Obligation (ECO), for any of the costs of the purchase or installation of the eligible low carbon heating system in question
- that they have never had any previous funding or support from public funds or government schemes such as ECO and RHI for a previous low carbon heating system in the property.
- that they have read and understood the recommendations on their Energy Performance Certificate
- where the property owner does not occupy the property, has informed the tenant of the impact of the installation of the eligible system

5.25. We also inform property owners of the possibility that we may request access to their property for audit purposes.<sup>103</sup>

5.26. Property owners must provide these confirmations within 14 days of being contacted by us and consent must be provided via the validation link in the email provided. We cannot accept consent provided via any other medium unless the assisted digital route is being used.<sup>104</sup>

5.27. In the event property owners are required to provide us with copies of ID documents, they will have 14 days to provide us with these.

5.28. We will inform the installer if consent has been provided.

5.29. If we do not receive the property owner's consent within 14 days, the voucher application will expire, and we may reject the voucher application.

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<sup>103</sup> The BUS regulations, Regulation 18(1)

<sup>104</sup> <https://www.ofgem.gov.uk/publications/boiler-upgrade-scheme-guidance-property-owners>

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5.30. Where a voucher application has been rejected following consent being provided, we will inform the installer. Another voucher application can be made for the same property, and we will re-seek consent.

5.31. The property owner is only able to consent to one voucher application per property. If they consent to one installer's voucher application in relation to a property, any other voucher applications relating to that property will be rejected.

5.32. Where the property owner has confirmed consent in error, the property owner must contact us at [BUS.application@ofgem.gov.uk](mailto:BUS.application@ofgem.gov.uk) highlighting the error.

5.33. Where the property owner consent has been provided fraudulently, we will reject the voucher application and may be in further contact about it. For information on how we deal with fraud, please see chapter 9 on audit and compliance.

### **Power of attorney**

5.34. Where property owners have a lasting power of attorney (LPA) in place, the confirmation of consent for a BUS application being made should be provided by the attorney.

5.35. When applying for a BUS voucher, the installer should always provide the name of the property owner on the application alongside their residential address and the installation address (if these are different).

5.36. However, if consent is to be confirmed by an attorney, the consent email field should be populated with the attorney's email address. The installer must inform Ofgem that the consent will be provided by an attorney whereby we will seek further information.

5.37. For any LPA registered on or after 1 September 2019 we will require the surname of the property owner (the donor) and the LPA access code. If the LPA is registered before 1 September 2019, we will require a copy of the LPA. For more information on LPA please see government portal.<sup>105</sup>

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<sup>105</sup> <https://www.gov.uk/view-lasting-power-of-attorney>

### **Assisted digital**

5.38. We realise that some property owners do not use emails or may not be able to access the online service to provide their consent. If the installer is unable to provide an email address for the property owner, we will contact them via an alternative channel such as telephone or post. As this might take longer, we allow 28 days for the property owner to provide consent. However, it is important that the property owner responds as failure to respond may lead to the voucher application being rejected after 28 days.

5.39. Ofgem will provide a Welsh translated service where the installer requests this.

### **Properly Made**

5.40. A voucher application is only considered 'properly made' when we have received all the information required to assess the eligibility of a voucher application, including property owner consent (as set out in paragraphs 5.16 to 5.50 and within the BUS regulations).<sup>106</sup>

### **Requests for further information**

5.41. Where we require additional information to assess a voucher application, we will contact the installer to request this. The installer must provide this additional information by the deadline stated which will not be less than 14 days from the request being made.<sup>107</sup> Failure to provide additional information could lead to the voucher application being rejected. Where we reject a voucher application, we will send a notice to the installer outlining the reason for rejection.<sup>108</sup>

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<sup>106</sup> The BUS regulations, Regulation 2(1) – definition of "properly made".

<sup>107</sup> The BUS regulations, Regulation 14(5)(a)

<sup>108</sup> The BUS Regulation, Regulation 15 (10)

## **BUS voucher**

5.42. Once a properly made voucher application has been assessed and we are satisfied that all the eligibility requirements have been met, we will issue a BUS voucher on behalf of the Secretary of State in the form of an email.<sup>109</sup>

5.43. The BUS voucher includes the following information:<sup>110</sup>

- voucher issue date
- voucher expiry date
- unique voucher ID
- type of heating system applied for (ASHP, GSHP, biomass boiler)
- installation address
- installer to which the voucher relates
- name, address, email address (where applicable), and telephone number of the property owner to which the voucher relates
- category and value of the grant that will be paid to the installer following successful redemption of the voucher

5.44. We will also notify the property owner that a BUS voucher has been issued.

5.45. BUS vouchers are non-transferable and linked to installer, property owner, property type, property address and technology type. If any of the information relied on at voucher

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<sup>109</sup> Vouchers will only be issued where the allocated budget threshold for the relevant period has not been met. Otherwise, they will enter a queue. See chapter 7 for more information on budget and vouchers.

<sup>110</sup> The BUS regulations, Regulation 15(1)



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application is no longer applicable at voucher redemption or has changed, the voucher redemption application may be rejected.

5.46. The last date we are able to issue vouchers is 31 December 2027.<sup>111</sup> Further details about submitting voucher applications around this date will be provided closer to the time.

5.47. Once a voucher application is approved, a BUS voucher is issued to the installer. The voucher needs to be redeemed in order to receive a BUS grant.

5.48. The validity period and grant amount associated with each voucher are set within the BUS regulations and are dependent on technology.

5.49. For more information on the grant level change, please see Table 7 below.

5.50. If the installer has not been able to complete the installation within the voucher validity period, the voucher will expire and will not be able to be redeemed. However, where a voucher has expired, installers can re-apply for a new voucher. The BUS regulations do not allow for any extensions to the voucher validity period. Installers do not need to withdraw an application if the voucher has expired. Please see paragraphs 5.65 to 5.83 on re-applications.

### **Grant level change**

5.51. On 21 September 2023, DESNZ issued a change notice to increase the BUS grant level for some eligible technology types<sup>112</sup>. These grant changes were active from Monday 23 October 2023 and the grant levels are set out in Table 7.

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<sup>111</sup> The BUS regulations, Regulation 15(7)(c)

<sup>112</sup> The BUS regulations, Regulation 13(4)

**Table 7 – grant values and validity periods valid from 23 October 2023**

<i>Technology type</i>	<i>Voucher Validity Period</i>	<i>Grant Value (23 May 2022 – 22 October 2023)</i>	<i>Grant Value (effective from Monday 23 October 2023)</i>
<i>Air source heat pump</i>	<i>3 months</i>	<i>£5000</i>	<i>£7500</i>
<i>Ground source heat pump</i>	<i>6 months</i>	<i>£6000</i>	<i>£7500</i>
<i>Biomass boiler</i>	<i>3 Months</i>	<i>£5000</i>	<i>£5000</i>

**Withdrawal of a BUS application**

5.52. Installers can withdraw BUS voucher applications that they have submitted.

5.53. Once an application has been withdrawn it cannot be reinstated. If an installer wishes to apply for a BUS grant at a later date, they must submit a new application via the online portal (or, if needed, through the assisted digital route). For more information on cancellation and re-applications please see paragraphs 5.65 to 5.82.

5.54. If an installer wishes to withdraw their application, installers can do so through the Installer dashboard, by selecting the voucher they wish to withdraw, and choosing the option “cancel voucher”. If no further information is required, we will promptly notify the installer that the application has been successfully withdrawn.

5.55. Once a voucher has been issued the installer may make a request that the voucher be withdrawn. Such a request will be accepted where the corresponding redemption application

**This guidance applies to applications submitted on or after 8 May 2024.**

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has not already been approved<sup>113</sup>. However, once the installer has been notified that their redemption application has been approved such a request will not be accepted.

5.56. In cases where we do need more details regarding the withdrawal, we may contact the installer to request the necessary information. Installers will have 14 days to provide the information requested to complete the withdrawal process.

5.57. Please note that failure to provide information in the 14 days could lead to a rejection of the BUS application.

5.58. Please refer to paragraph 3.52 for information on how the 120 day commissioning rule interacts with reapplications.

## **Stage 2: Voucher redemption application**

5.59. Once the installer has received a BUS voucher and has commissioned the associated low carbon heating system, a voucher redemption application can be submitted at any point within the voucher validity period ahead of the voucher expiry date (see Figure 3).

5.60. Installers should create and submit voucher redemption applications online via the BUS digital portal<sup>114</sup>. Installers can do this in the installer dashboard of the BUS digital portal by selecting the voucher they wish to submit a redemption application for and selecting "Redeem Voucher".

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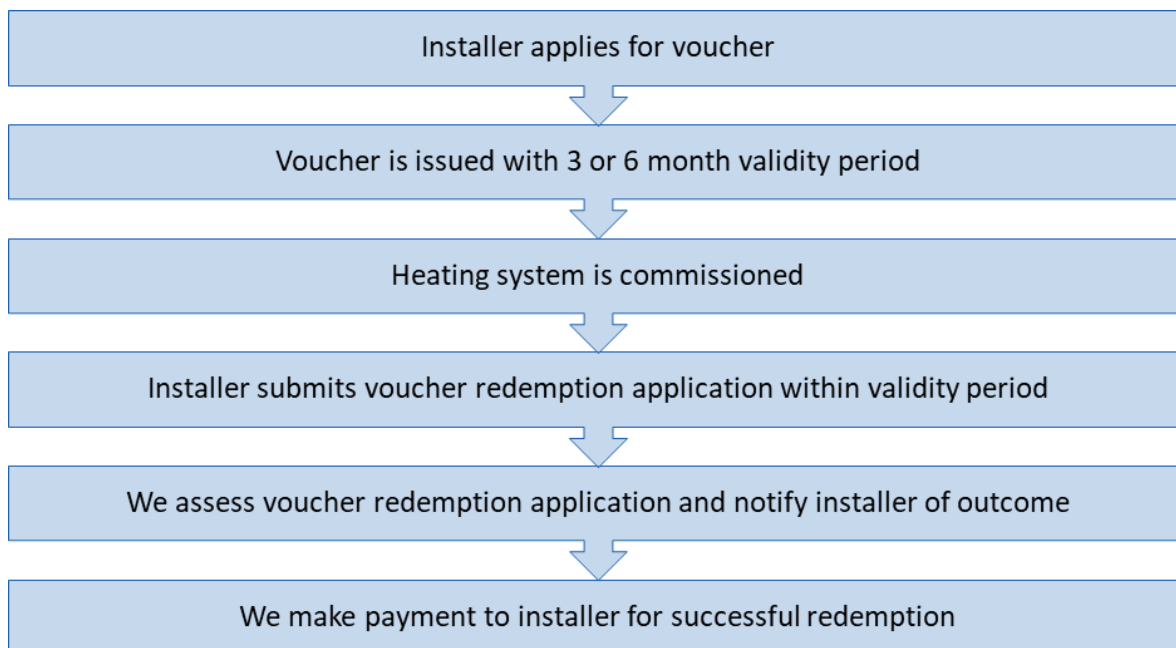
<sup>113</sup> The BUS Regulation, Regulation 14 (9)

<sup>114</sup> [Sign in to your Boiler Upgrade Scheme installer account - GOV.UK \(www.gov.uk\)](https://www.gov.uk/sign-in-to-your-boiler-upgrade-scheme-installer-account)

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**Figure 3 – Voucher application and voucher redemption application process<sup>115</sup>**



To successfully redeem a voucher the installer must provide the following information:<sup>116</sup>

- MCS installation certificate number
- BUS installer account ID number
- the unique voucher ID
- biomass emissions certificate, if applicable<sup>117</sup>

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<sup>115</sup> Installers can make voucher applications retrospectively after the installation has commissioned, but they will still need to apply for a voucher before they can redeem it.

<sup>116</sup> The BUS regulations, Schedule 3

<sup>117</sup> This will be in cases where the product being installed is not included in the PEL but meets the emissions requirements. In these cases, we will accept an emissions certificate from the manufacturer or a specialist lab as evidence of the air quality requirements being met.

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5.61. If a different product is installed to the one originally quoted for, the installer does not need to inform us of this fact if the type of technology remains the same (ASHP, GSHP, GSHP as part of a shared ground loop, biomass boiler), it is a product on the PEL and it meets the scheme eligibility requirements. We check the product installed on the MCS certificate against eligible products listed on our PEL at redemption. For further information on the PEL, please see paragraph 3.57.

5.62. If a different technology is installed from the one stated in the voucher application, the voucher is not valid, cannot be successfully redeemed and the installer will have to re-apply for a BUS voucher.

5.63. Once a voucher redemption application is submitted, we assess it against the eligibility criteria. This includes using the MCS installation certificate number to check key information on the MCS Installations Database (MID). Once this assessment is complete, we will notify the installer if the voucher redemption application was successful. Where we reject a voucher redemption application, we will send a notice to the installer outlining the reason for rejection.

5.64. Where we require additional information to assess a voucher redemption application, we will contact the installer to request this and set out what information is required. The installer must provide this additional information by the deadline stated which will not be less than 14 days from the request being made. Failure to provide additional information could lead to the voucher redemption application being rejected.

## **Re-applications**

### **Voucher re-applications (Active Applications)**

5.65. If a voucher application has materially incorrect details and the installer needs to withdraw and reapply, the installer can do this via the Installer dashboard. Select the voucher you wish to withdraw and reapply for, then select 'Reapply'. This feature will allow the installer to re-use data from the application they are withdrawing and amend any details that need to be corrected.

### **Voucher re-applications (Issued Vouchers/Active Redemptions)**

5.66. If your voucher has not yet expired and you know that the installation will not be completed within the voucher validity period, we will require you to withdraw your voucher before submitting a new application. For more information on application withdrawal please

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see paragraphs 5.52 to 5.58. Please note, withdrawal requests can be made by any user authorised on the Installer Account. Withdrawals are final and withdrawn vouchers cannot be reinstated.

**Voucher re-applications (Rejected, Withdrawn, Revoked applications)**

5.67. If the voucher validity period has expired without the installer completing the installation, the installer will need to re-apply for a new voucher. The BUS regulations do not allow for any extensions to the voucher validity period. Applications do not need to be withdrawn for this purpose.

5.68. Voucher re-application can be actioned via the Installer dashboard – select the voucher you wish to withdraw and reapply for, then select 'Re-Apply'. This feature will allow the installer to re-use data from withdrawn applications. This function will also require you to re-apply for the same property and request that the property owner re-confirms they have consented to the voucher application being made.

5.69. Depending on the current status of your existing application, you may find that the installer dashboard does not facilitate a new application for the same property. If you experience any issues, please email our applications team at [BUS.application@ofgem.gov.uk](mailto:BUS.application@ofgem.gov.uk), quoting your voucher ID (GID number) and we will be able to support resolving this issue for you.

**Redemption re-applications**

5.70. Once a voucher redemption application is submitted, we assess it against the eligibility criteria. Once this assessment is complete, we will notify the installer if the voucher redemption application was successful or not.

5.71. If a redemption application is unsuccessful, an installer may seek to resolve the issues for which the redemption was rejected and submit a new redemption application. Redemption re-applications must be submitted within the voucher validity period.

5.72. Installers can reapply for a redemption via the Installer dashboard by selecting the voucher they wish to submit a further redemption application for and selecting "Redeem Voucher". Installers can refer to [Stage 2 Voucher Redemption Application](#) for guidance on submitting a redemption application. If a voucher has expired or been revoked, installers cannot submit a reapplication.

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5.73. The cancel and reapply function exists for vouchers that have been rejected as at the application stage as per 5.70 and are within the voucher validity period. This function should not be used if you are seeking to re-redeem a voucher.

**Relevant information for all reapplications**

5.74. Once the new voucher application is submitted, a new unique voucher ID will be provided. The installer can email [BUS.Application@ofgem.gov.uk](mailto:BUS.Application@ofgem.gov.uk), confirming in the body of the email that the voucher is a re-application of a previous voucher ID. Any supporting evidence provided in the previous voucher ID, if still valid, can be transferred to the new application ID provided, if you inform us to do so.

5.75. The receipt date of this consent and new supporting valid evidence is when we will consider this new voucher application to be properly made. We will then proceed with the voucher issuance process, as normal, including eligibility checks.

5.76. Where a voucher expires and the installer wishes to re-apply for it but any of the details submitted in the original voucher application form have changed (for example an EPC may have expired or the technology type may have changed), this also requires a new voucher application, which is treated in the same way as all other voucher applications.

5.77. We are not able to extend validity periods under any circumstances. Be mindful that we can't guarantee budget will be available for a reapplication so installers should endeavour to only apply for a voucher when they need it and are confident that they will be able to redeem it within its validity period.

5.78. Installers must also be aware of the 120-day commissioning date rule, which is explained in full in paragraphs 3.51 – 3.54. If an installer allows their BUS voucher to expire, or voluntarily withdraws, this time limit will not be extended for any re-application. We recommend speaking to the property owner before withdrawing any application.

**Redemption re-applications**

5.79. Once a voucher redemption application is submitted, we assess it against the eligibility criteria. Once this assessment is complete, we will notify the installer if the voucher redemption application was successful or not.

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5.80. If a redemption application is unsuccessful, an installer may seek to resolve the issues for which the redemption was rejected and submit a new redemption application. Redemption re-applications must be submitted within the voucher validity period.

5.81. Installers can reapply for a redemption via the Installer dashboard by selecting the voucher they wish to submit a further redemption application for and selecting “Redeem Voucher”. Installers can refer to [Stage 2 Voucher Redemption Application](#) for guidance on submitting a redemption application. If a voucher has expired or been revoked, installers cannot submit a reapplication.

5.82. The cancel and reapply function exists for vouchers that have been rejected as at the application stage as per 5.85 and are within the voucher validity period. This function should not be used if you are seeking to re-redeem a voucher.

## **Help with a BUS account creation, application, reapplication, and redemption**

If you need help or have questions, contact the Enquiries Team:

- Telephone: 0330 053 2006
- Email: [BUS.enquiry@ofgem.gov.uk](mailto:BUS.enquiry@ofgem.gov.uk).

For opening hours, please see our website.<sup>118</sup>

5.83. If you have a form to submit, please send it to one of the other email addresses stated below:

- To submit a BUS account creation form: [BUS.accountcreation@ofgem.gov.uk](mailto:BUS.accountcreation@ofgem.gov.uk).
- To submit a BUS voucher application: [BUS.Application@ofgem.gov.uk](mailto:BUS.Application@ofgem.gov.uk).
- To submit a BUS redemption application: [BUS.Redemption@ofgem.gov.uk](mailto:BUS.Redemption@ofgem.gov.uk).

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<sup>118</sup> <https://www.ofgem.gov.uk/about-us/contact-us/environmental-and-social-scheme-contacts>.



## 6. Grant payment

### Section summary

This section provides information on the process for receiving a payment after a voucher is redeemed. It sets out the details we require to make a payment.

### Grant payments to installers

6.1. Following successful redemption of a voucher, we then process the voucher redemption application for payment.

6.2. We won't issue vouchers if the budget isn't available for them to be redeemed (as set out in chapter 5). Therefore, once a voucher is issued, applicants can be confident that there will be the budget available to make a payment if the voucher redemption application is successful.

#### Payment schedule

6.3. Once a redemption application has been approved, it will be processed for payment, along with all other redeemed vouchers, on the next scheduled payment day. We operate a weekly payment schedule, meaning we will seek to make several payments on the same day each week. Therefore, the gap between us approving a voucher redemption application and sending payment for it will be a maximum of five working days for most voucher redemption applications. Where the scheduled payment day is a public holiday, payments will be made on the following working day. We may make payments more frequently depending on our capacity. We understand it may take up to three to five additional working days for banks to clear funds and for the payment to appear in the installer's account.

6.4. The payment reference shows the installer account ID. Where installers have more than one successful voucher redemption application, they will receive bulk payments to their bank accounts. To see which voucher has been paid, please see the remittance email sent to the authorised representative of the account. Authorised representatives may forward the remittance to other account users if they wish.

## Payment requirements

6.5. Payments are issued into UK bank accounts which accept pound sterling.<sup>119</sup>

6.6. Installers are responsible for keeping their bank details up to date within their installer account. Updating bank details will trigger our re-verification processes, which may cause a delay to payments. We are not responsible if we make a payment to the wrong bank account if an installer has failed to update their bank account details. If this happens, we will not issue a payment twice.

6.7. If a notification has been received that a voucher redemption application has been successful, but payment has not been received after ten working days have passed, please contact us at [BUS.redemption@ofgem.gov.uk](mailto:BUS.redemption@ofgem.gov.uk).

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<sup>119</sup> The BUS regulations, Schedule 2, 2(e)

## 7. Scheme budget

### Section summary

This section details the voucher validity periods and grant amounts available for different technologies, and the process for changes to the grant values. It sets out the ways in which queues, voucher expiration and voucher revocation operate.

### Grant value changes

7.1. The Secretary of State may decide to review the grant value offered for ASHPs, GSHPs or biomass boilers at any time, taking into account the following factors:<sup>120</sup>

- the number of vouchers issued
- a change in the market price or in the cost of installation of heat pumps or biomass boilers
- any other factor which is likely to affect the number of voucher applications or the cost of installing or running heat pumps or biomass boilers.

7.2. The value of the grants may increase or decrease by any amount the Secretary of State determines.

7.3. If the Secretary of State decides to change the grant values under BUS, they are required publish a “grant change notice” at least 28 days prior to the change coming into effect. The notice will specify the new value of the grants and the date on which the change will take effect.<sup>121</sup>

7.4. Any change to the grant values will only affect vouchers issued where the corresponding application was properly made on or after the date the value takes effect.

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<sup>120</sup> The BUS regulations, Regulation 13(2)

<sup>121</sup> The BUS regulations, Regulation 13(4)

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7.5. Vouchers that have already been issued and are within their validity period will retain the value assigned to them when they were issued. If the date of the grant value change occurs after a voucher application has been submitted but before we have issued a voucher, we will assign a grant value based on when we consider the voucher application to be properly made. See paragraph 5.40 for more information on properly made applications.

## Grant Categories

7.6. Currently, available grants are split by replacement technology type, these are: ASHP, GSHP and biomass boiler.

7.7. The Secretary of State has the power to review and differentiate the current set of grant categories to provide more targeted support for certain eligible system types and properties.<sup>122</sup> As a result of such a review, the Secretary of State may choose to replace the current set of grant categories with a new set of grant categories from Schedule 1A of the BUS Regulations.

7.8. If such a decision is made the Secretary of State must publish a notice<sup>123</sup> stating which new set of grant categories from Schedule 1A will be brought into effect, and what the values associated with those categories will be.

7.9. The Secretary of State will publish a notice on the Government website. 28 days later the new set of grant categories will come into effect. Once the new set of grant categories comes into force this will have the effect of deactivating the previously published set, as there can only be one set of grant categories activated with published grant values at any one time.<sup>124</sup>

7.10. Schedule 1A of the BUS regulations provide the four potential sets of grant categories that could be activated on BUS. These sets of grant categories include categories which vary by technology type (ASHP, GSHP or biomass boiler) **or**:

- Property type (retrofit property or eligible self-build), and/or

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<sup>122</sup> The BUS regulations, Regulation 13 (3)

<sup>123</sup> The BUS regulations, Regulation 13(2A)

<sup>124</sup> The BUS regulations, Regulation 2B

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- Whether a property is connected to the gas grid
- Together with what type of heating system (eg fossil fuel boiler, electric heating system) is being replaced by the eligible system (heat pump/biomass boiler)

7.11. Applications which are properly made on or after the date on which a new set of grant categories comes into effect will receive the new grant amount, subject to meeting BUS eligibility criteria and successfully redeeming the voucher within its validity period.

7.12. Applications which are properly made before the date on which a new set of grant categories comes into effect will receive previous relevant grant amount. Vouchers issued prior to the grant level changing will retain the grant value stated on the voucher, should they be successfully redeemed.

7.13. Installers may withdraw their voucher, via the installer dashboard, and reapply after the new set of grant categories comes into force. However, installers should refer to paragraph 3.52 for more information on the 120 day commissioning rule and how this interacts with reapplications. Where the 120 day commissioning rule is exceeded as a result of a voluntary withdrawal and subsequent reapplication, the voucher will be ineligible.

7.14. We encourage property owners and installers to discuss any potential withdrawal and make decisions based on their respective circumstances.

## **Scheme budget**

7.15. The Secretary of State is responsible for setting the scheme budget.<sup>125</sup> The BUS has an overall budget of £450m for the period between 2022 and 2025, split equally giving an annual budget of £150m per financial year. In December 2023, an additional budget of £1.5bn was announced for the extended BUS scheme (2025-2028).<sup>126</sup>

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<sup>125</sup> The BUS regulations, Regulation 12

<sup>126</sup> [Proposed amendments to the Boiler Upgrade Scheme Regulations - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/consultations/proposed-amendments-to-the-boiler-upgrade-scheme-regulations)

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7.16. Ofgem are not able to issue any new vouchers once the budget threshold has been met.<sup>127</sup> If an applicant has been issued a voucher and it is within its validity period, they can still be paid the grant value following a successful voucher redemption application.

7.17. We publish monthly reports detailing the remaining available annual budget to provide transparency on the likelihood of a successful voucher application being allocated budget (see chapter 10 on public reporting). If the annual budget allocation is met, we will inform installers by publishing details on our website and on social media channels.

### **Queues**

7.18. If the available scheme budget runs out, then it may be necessary for us to operate a queue until further budget is available. If a queue is in operation, an installer may still make a voucher application, but they will not be issued a voucher until they reach the front of the queue. Voucher applications will enter the queue based on when they are deemed properly made. The queue may reduce in size when we are able to issue more vouchers due to existing vouchers expiring or being returned, or the annual or quarterly budget allocation being increased, reset, or removed.<sup>128</sup>

### **Expired/revoked vouchers**

7.19. If installers do not submit a voucher redemption application within the voucher validity period, the voucher will expire and the budget that had been allocated to that voucher will be returned, where possible, to the overall remaining budget. Extensions to the voucher validity periods will not be allowed, however installers are able to re-apply where they were unable to commission in time (or apply retrospectively). Please see Chapter 3 and 5 regarding the 120 day commissioning rule before re-applying.

7.20. Where vouchers are revoked during the validity period, the value associated with revoked vouchers will also be returned to the overall remaining budget. For more information on revoking vouchers see chapter 9 on audit and compliance.

### **Quarterly budget allocation**

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<sup>127</sup> The BUS regulations, Regulation 15(4)

<sup>128</sup> The BUS regulations, regulation 15(4)

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7.21. The Secretary of State may introduce a cap on the number of vouchers that we may issue each quarter (beginning 1 April, 1 July, 1 October, 1 January). This is intended to ensure there are sufficient vouchers available throughout the whole of each scheme year. If the Secretary of State decides a quarterly cap is necessary, then they will publish that fact before the relevant quarter begins.<sup>129</sup>

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<sup>129</sup> The BUS regulations, Regulation 12(1)(c)

## 8. Installer obligations

### Section summary

We detail the role and responsibilities of installers throughout the scheme, including their obligations to retain information and inform us of inaccurate information.

### Submission of voucher applications and voucher redemption applications

8.1. Installers are responsible for satisfying themselves that the information they are submitting on a property owner's behalf is accurate. This will involve communication with the property owner to gather information and confirm its accuracy.

8.2. If we require further information to determine either a voucher application or a voucher redemption application, we will issue the installer a notice that specifies what must be provided. The installer has 14 days from the date the notice is issued to provide the information.<sup>130</sup> Details of how to provide further information are stated on the request. If the information is not provided, we may reject the voucher application or voucher redemption application.

8.3. The installer must retain a copy of any information provided as part of their voucher application and voucher redemption application for six years from the date that the application was made.<sup>131</sup> This is to allow comprehensive audits to be carried out, in order to ensure compliance with the scheme rules.

### Informing property owners

8.4. The installer must inform the property owner that their property may be audited. When we seek the property owner's consent after a voucher application is submitted on their behalf,

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<sup>130</sup> The BUS regulations, Regulation 14(5)(a)

<sup>131</sup> The BUS regulations, Regulation 17(1)(a)



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we also inform them of the possibility of audits. For more information on audits please see chapter 9 on audit and compliance.

## Accuracy and provision of information

8.5. If the installer becomes aware that any of the information provided in support of their voucher application or voucher redemption application was either incorrect or has changed since the application was submitted, then they must notify us of the details within 14 days of becoming aware.<sup>132</sup>

8.6. Whenever we require information relating to an installation, the installer is obligated to provide that information with 14 days of our request.<sup>133</sup>

8.7. These obligations apply regardless of whether the voucher relating to an installation is still valid, has expired, been redeemed, or revoked.

8.8. Where **information provided** by the property owner to the installer is **false or inaccurate** and the installer become aware of this, the installer must notify us of that fact **no more than 14 days** after becoming aware and should not redeem the BUS voucher. This obligation also applies to installers who are no longer installer or cease to be an installer.<sup>134</sup> The installer should assure themselves that the information they submit to us is correct. Inaccurate information could lead to us rejecting a voucher application or voucher redemption application, revoking a voucher, withholding a payment, or recouping a payment from the installer. We do not have any role or responsibility relating to the contractual arrangements between installers and property owners.

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<sup>132</sup> The BUS regulations, Regulation 17(1)(b)

<sup>133</sup> The BUS regulations, Regulation 17(1)(b)

<sup>134</sup> The BUS regulations, Regulation 24

## 9. Audit and compliance

### Section summary

In this section, we explain our audit powers under the BUS. It explains why we audit, the types of audits we carry out, and what to expect from audits. It also sets out the actions we can take if we are investigating non-compliance or if we establish that an installer has failed to meet their obligations. Finally, it describes the circumstances under which installers have a right of review and the process for this.

### Why we conduct audits

9.1. To help ensure that the public money that funds the BUS has been used correctly in line with the BUS eligibility criteria, we (and agents authorised on our behalf) run a comprehensive audit programme on properties, installations, and installers that have made a BUS application or received a BUS grant. The regulations provide a range of powers that allow us to take action where non-compliance, fraud or abuse is suspected or discovered.

### Audit types

9.2. We carry out both site and desk audits on a statistical or a targeted basis. Where Ofgem has selected a targeted audit, we will notify the installer of this and will put payments on hold until the audit is complete.

9.3. **Desk Audits:** Desk audits can be by phone or email. In these cases, we may need additional information from the property owner or the installer as assurance that the installation is compliant with scheme eligibility. We may request that installers and property owners send additional information to us via email. Alternatively, additional information may be sent to Ofgem via post.

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9.4. **Site Audits:** We may request access at any reasonable hour to inspect a property which relates to a voucher that has been applied for, redeemed, or had a grant paid for a number of reasons including but not limited to:<sup>135</sup>

- verifying the existence of an eligible heating system
- verifying that a property is an eligible property
- taking photographs, measurements, or video or audio recordings in relation to that verification
- verifying the installation meets the full space and water heating demands of a property
- confirming if the property owner has provided consent to the voucher application
- ensuring that there is no contravention of the BUS regulations

9.5. The request for access is made by a notice to the property owner which will:<sup>136</sup>

- be given to the property owner no less than two days before the proposed inspection is to take place, and
- inform the property owner of their right to refuse the request and the possible consequences of doing so as explained in paragraph 9.8.

9.6. The request applies regardless of whether the voucher is valid, has expired, been redeemed, or been revoked.<sup>137</sup>

9.7. All our site auditors are Disclosure and Barring Service (DBS) checked for security. Properties could be selected at any point from when a voucher application is made through to after the installation is completed and has received the grant payment. It is possible for a property owner to check that a request from us for access to their property is genuine by

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<sup>135</sup> The BUS regulations, Regulation 18(1)

<sup>136</sup> The BUS regulations, Regulation 18(2)

<sup>137</sup> The BUS regulations, Regulation 18(3)

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either emailing [BUS.enquiry@ofgem.gov.uk](mailto:BUS.enquiry@ofgem.gov.uk) or by telephoning our BUS Enquiry line on 0330 053 2006.

9.8. A refusal to permit a site audit may contribute towards a decision by Ofgem to take compliance action. For example, this may contribute towards reasonable grounds to suspect non-compliance with one or more scheme requirements and Ofgem may consequently withhold payments for those installations. Where grant payments have been made and we or our authorised agents are refused entry for audit, we may take action such as revoking a voucher, withholding a payment, or requesting a repayment of the grant.<sup>138</sup> More information on revocation and repayment can be found below.

9.9. Installers should inform property owners of the possibility of audits as part of the voucher application process and explain any possible consequence of refusing or delaying audits.

We are likely to request evidence when we carry out an audit. The installer has an obligation to keep all documentation relied upon for voucher applications and voucher redemption applications for six years from the date it was made.<sup>139</sup> Evidence that may be requested includes:

- copies of MCS certificate
- copies of EPCs
- EPC site notes<sup>140</sup>
- purchase receipts/quote for the renewable technology

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<sup>138</sup> Repayment request notices will be sent to the installer and not to the property owner.

<sup>139</sup> The BUS regulations, Regulation 17(1)(a)

<sup>140</sup> We ask that installers and property owners ensure that site notes from EPCs going forward are retained, and we will expect installers and property owners to be able to provide EPC site notes for EPCs produced since the publication of guidance v1.1 in July 2022. We understand that it may not be possible to obtain EPC site notes for older EPCs, but we may request them and would expect to receive them if they are available.

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- Total Building Heat Loss Calculations
- Emission certificate if the system is a biomass boiler
- Evidence you have deducted the value of the BUS voucher (this may be included on your invoice to your customer or may be listed separately)

9.10. Please note this list is not exhaustive and we may request any information we deem necessary to verify eligibility for the scheme. We would recommend for best practice that time-stamped geo-tagged photographs are taken during the installation of the heat pump or biomass boiler. These photographs could be beneficial for audit purposes when the installation is selected for desk audit.

9.11. **After an audit has been conducted**, we will write to the installer and property owner to outline that an audit has taken place followed by the results of the audit. Where there are rectifiable issues identified by the audit, the letter will specify the actions required of the installer, and, where required, of the property owner, to rectify the situation.<sup>141</sup>

9.12. Installers are expected to address these issues, with the help of property owners where applicable, and need to report back to us once they have done so. Instructions of how to report back will be contained within the communication from us. Depending on the nature of the issues identified and the installer's response, we may either launch a formal compliance investigation (which may involve a temporary withholding of a grant payment) or take other compliance action.

9.13. MCS undertake their own checks on BUS-funded heating system installations completed by MCS installers. They will be contacting property owners directly to capture information to carry out these checks. They may contact property owners via [boilerupgradescheme@mcscertified.com](mailto:boilerupgradescheme@mcscertified.com) or 0333 103 8198. Property owners should aim to respond within seven days of receiving their communication. For further help, contact MCS.<sup>142</sup>

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<sup>141</sup> The BUS regulations, Regulation 19(4)

<sup>142</sup> <https://mcscertified.com/about-us/contact-us/>

## **Withholding payments during investigation and non-compliance**

9.14. We may withhold payments for several reasons including but not limited to where we have reasonable grounds to suspect that:

- the installer has failed or is failing to comply with an obligation
- the installer has been issued a voucher or has been paid as a result of the provision of incorrect information on another application
- the installer is not an MCS certified installer for the appropriate technology
- the property is not an eligible property
- the heating system is not eligible, or not eligible in relation to the property specified in the voucher
- the property owner has not consented to the installation or that consent is falsified
- the property owner has previously received public funding for the low carbon heating system or for another low carbon heating system at the same address.

9.15. Reasonable grounds include where we receive notification from MCS or a consumer code that an installer is under investigation by them for a breach of their requirements.

9.16. Where an installer has multiple applications, we have the power to withhold payments to any or all of those applications until we are satisfied.

9.17. Within 14 days of deciding to withhold a payment, we will send a notice to the installer specifying:<sup>143</sup>

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<sup>143</sup> The BUS regulations, Regulation 20(2)

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- which of the grounds in paragraph 9.14 apply
- the payment(s) which will be withheld and the next steps in the investigation
- the information the installer must provide and the date it must be provided
- the consequences of failing to provide the information by the date specified

9.18. When we conclude our investigation, we will inform the installer of the outcome and the action we will take.

9.19. Within three months of sending the installer a withholding notice, where we are satisfied that the installer has provided the required information or taken appropriate steps to address the issue, we will notify and make the payment to the installer.

9.20. Where we are not satisfied, we may revoke the voucher and reject any subsequent voucher applications and voucher redemption applications by that installer or a person connected to that installer. We will send a further notice to the installer specifying the case of non-compliance.<sup>144</sup>

9.21. The notice will state if we will:

- revoke the voucher
- require repayment
- offset any future payments due to that installer, or
- undertake any other action including but not limited to referring to other bodies and seeking civil recovery<sup>145</sup>

## **Right of review**

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<sup>144</sup> The BUS regulations, Regulation 20(5)

<sup>145</sup> Civil recovery notices will be sent to installers.

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9.22. The right of review does not apply to our function of withholding payment. We only withhold a payment during a targeted audit or an investigation into compliance with the BUS regulations. The conclusion and outcome of such an audit or investigation will either lead to a grant payment being made or a decision to revoke the voucher. The right of review will then apply to the decision to revoke the voucher. For more information about the right of review process, please see paragraphs 9.41 to 9.50.

### **Former installers**

9.23. We have the powers to investigate a **former installer** and continue with an ongoing investigation on a former installer where there has been a breach of the BUS requirements.<sup>146</sup>

9.24. A former installer is any installer who has created a BUS account or has been a named user on a BUS account within the lifetime of the scheme, but also one that does not currently hold any active or open applications or vouchers.

### **Revocation of vouchers**

9.25. If we have reasonable grounds to suspect that an installer has been issued a voucher as a result of information which is materially incorrect, we have the power to revoke or “take back” vouchers.<sup>147</sup> After we have revoked a voucher, we also have the power to reject other voucher applications and voucher redemption applications associated with the installer or a person associated with the installer.<sup>148</sup>

9.26. Examples of cases that might warrant or contribute to a revocation may include (but are not limited to):

- Providing information incorrect in a material particular in order to obtain a voucher (such as false information)

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<sup>146</sup> The BUS regulations, Regulation 24

<sup>147</sup> The BUS regulations, Regulation 21(1)

<sup>148</sup> The BUS regulations, Regulation 21(2)



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- providing information incorrect in a material particular in order to obtain a grant payment (such as false information)
- material errors in declarations
- refusal of access for audit access

9.27. If we revoke a voucher, we will notify the installer within 14 days of the decision. The notice will state:<sup>149</sup>

- the reason for the revocation
- details of the installer’s right to request a review of our decision

## **Fraud**

9.28. Irrespective of any action we may take in relation to non-compliance, there may be instances where we uncover evidence of possible criminal conduct such as fraud.

9.29. We take fraud and non-compliance within our schemes seriously. We have a dedicated counter fraud function that undertakes activity to detect, prevent and deter fraudulent activity on the environmental schemes that we deliver.

9.30. Where we suspect that an installer has deliberately falsified information provided to us in order to defraud the scheme, we will refer such cases to the relevant authorities such as Action Fraud and the relevant police force for further action. This may lead to a criminal prosecution, possible loss of MCS accreditation in addition to the actions available to us in the face of non-compliance, listed above.

9.31. If you have concerns about suspected fraud, you should report it to us by:

- emailing us at [counterfraud@ofgem.gov.uk](mailto:counterfraud@ofgem.gov.uk) or

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<sup>149</sup> The BUS regulations, Regulation 21(3)

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- calling us on 0207 901 7373 where you will be invited to leave a voice message. If we require further information in order to consider the concern, we will call you back

9.32. Our website provides further information on what we do if we suspect fraud and what information we need you to provide if you are reporting a suspected fraud.<sup>150</sup>

### **Whistleblowing**

9.33. If anyone working in the energy sector or otherwise involved in the delivery of our environmental schemes or social programmes has concerns about wrongdoing at their workplace, they can contact our whistleblowing desk by:

- emailing us at [whistle@ofgem.gov.uk](mailto:whistle@ofgem.gov.uk) or
- telephoning us on 0207 901 7121

9.34. Our website page on whistleblowing contains further information relating to this.<sup>151</sup>

### **Repayment and offsetting**

9.35. Where it has been identified that a grant payment was made to an installer in error or they weren't eligible for the payment, we may either require the installer to repay the grant value or offset the amount against future payments to that installer.

9.36. Examples of circumstances that might lead or contribute to the recouping or offsetting of a grant amount include (but are not limited to):<sup>152</sup>

- An installer was paid:
  - an amount which exceeded the amount they were entitled to

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<sup>150</sup> <https://www.ofgem.gov.uk/environmental-and-social-schemes/counter-fraud-environmental-and-social-programmes>

<sup>151</sup> <https://www.ofgem.gov.uk/about-us/contact-us/whistleblowing>

<sup>152</sup> The BUS regulations, Regulation 22

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- whilst failing to comply with an installer obligation, or following such a failure
- as a result of the provision of information by the installer which was incorrect in a material particular
- A request for audit access was refused

9.37. Before taking any of the actions outlined in paragraph 9.35, we will send the installer a notice specifying:

- the amount we are seeking to recover
- the basis on which that amount is calculated
- whether we require the amount to be repaid or offset
- where applicable, the date by which the amount must be repaid, which must be not less than 28 days after the date on which the notice is sent
- details of the installer’s right of review

9.38. For repayments, if the installer fails to make payment in full by the date specified, we may recover any outstanding amount as a civil debt. **We may take court action to recover the payments if the installer doesn’t repay the amount within the timeframe we have specified.**

## **Revocation of compliance actions**

9.39. We may revoke, or “take back” a compliance action we have previously imposed on an installer.<sup>153</sup> We may do so where there was an error involved in our decision to exercise our compliance powers, or where it is otherwise just and equitable to do so.

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<sup>153</sup> The BUS regulations, Regulation 23

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9.40. We may revoke a sanction as a result of a current or former installer’s successful request for review. Within 14 days of the decision to revoke a sanction, we will send a notice to the installer specifying:

- the sanction which has been revoked
- the reason for the revocation
- what actions we propose to take relating to any grant payment (eg, where we had withheld or recouped)

## **Right of review**

9.41. The right of review process is intended to provide a means of requesting a review of a decision made by us.<sup>154</sup>

9.42. If a property owner or installer believes an error has been made in the decision that has been reached, the installer may ask for a review of this decision as part of the review process outlined in this section.

9.43. The right of review entitles the installer to ask for a review of a decision we have made, including where we:<sup>155</sup>

- reject a voucher application
- reject a voucher redemption application
- revoke a voucher
- require repayment of a grant already paid to the installer

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<sup>154</sup> <https://www.ofgem.gov.uk/publications/boiler-upgrade-scheme-review-request-form>

<sup>155</sup> The BUS regulations, Regulation 25

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- require future grant payments to be offset against payments already made but found to be non-compliant

9.44. Before submitting a statutory review request, installers should consider whether this is the appropriate option to take. In some cases, it may be quicker and easier to reapply instead as the statutory review team are unable to amend applications that have been correctly rejected. If the wrong information has been provided (for example, property owner contact details) or additional evidence hasn't yet been provided, it is likely that we'll uphold the decision and recommend that the installer reapplies. Having a voucher application or redemption application rejected doesn't prevent the installer from reapplying, providing the installation meets the eligibility criteria.

9.45. The right of review does not apply to our function of withholding payment.

9.46. If an installer would like to submit a request for a right of review of a decision we have made, they need to fill out the right of review form and submit it to us at [BUS.Review@ofgem.gov.uk](mailto:BUS.Review@ofgem.gov.uk).<sup>156</sup> **The request must be received by us within 28 days** of the date of the notice of the decision which is requested for review.<sup>157</sup> Installers must specify the decision they are requesting to be reviewed, any grounds on which the review is being requested and provide us with any supporting evidence that is relevant.

9.47. We may ask for further information and that must be provided to us.

9.48. The review of the decision will not be carried out by anyone who made the original decision.

9.49. We aim to reach a decision within 21 working days of receiving an application for review. If it is not possible to do so in that time, we will provide an update within this time.

9.50. We will notify the installer, and any other person affected by a decision, of the result within 21 days of concluding the review and making the decision.<sup>158</sup>

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<sup>156</sup> <https://www.ofgem.gov.uk/publications/boiler-upgrade-scheme-review-request-form>

<sup>157</sup> The BUS regulations, Regulation 25(2)(a)

<sup>158</sup> The BUS regulations, Regulation 25(6)

## 10. Public reporting

### Section summary

In this chapter we set out the data we include in our regular reports, and the frequency of our reporting.

### Reporting of key scheme data

10.1. As part of our administration of the BUS, we are required to publish reports on a quarterly and annual basis on our website.<sup>159</sup> Additionally, we will seek to publish monthly updates on the operation of the BUS. This aids transparency on how the scheme is progressing and how much budget remains available for installers to apply for.<sup>160</sup> For more information on the scheme budget, please see chapter 7.

10.2. The reports include the following information, at a minimum:

- number of vouchers issued
- total value of valid vouchers issued
- number of vouchers redeemed
- total value of grants paid
- remaining budget

### Reporting frequency

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<sup>159</sup> The BUS regulation, Regulation 30

<sup>160</sup> The BUS regulations, Regulation 30

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10.3. Monthly reports<sup>161</sup> for each calendar month will be published in the first week of the following month.

Quarterly reports will be published by:<sup>162</sup>

- Q1: 31 August
- Q2: 30 November
- Q3: 28 February
- Q4: 31 May

10.4. Annual reports will be published on the 31 July each year covering the preceding 12-month period ending with 31 March of that year.

10.5. All information is published in an anonymised form.

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<sup>161</sup> <https://www.ofgem.gov.uk/publications/bus-monthly-scheme-update>

<sup>162</sup> <https://www.ofgem.gov.uk/publications/boiler-upgrade-scheme-bus-quarterly-report-may-july-2022>

## 11. Queries, feedback, and complaints

### Section summary

This section outlines how installers can contact us about queries and raise complaints about the policy and the scheme administration.

### Queries

11.1. For general queries regarding the BUS, queries about the BUS guidance or our administration of the BUS should be directed to the BUS Enquiries team at [BUS.Enquiry@ofgem.gov.uk](mailto:BUS.Enquiry@ofgem.gov.uk) or by phone on 0330 053 2006.

### Complaints

#### Comments on policy and policy decisions

11.2. Where the complaint is about the scheme's underlying policy, including the eligibility criteria, please contact DESNZ at [boilerupgradescheme@energysecurity.gov.uk](mailto:boilerupgradescheme@energysecurity.gov.uk)

#### Comments and feedback about scheme administration

11.3. If an installer or property owner has a complaint or recommendation about our administration of the scheme generally or complaints on how we have handled a specific aspect of their application overall, they can email [feedback@ofgem.gov.uk](mailto:feedback@ofgem.gov.uk). Our Complaining About Ofgem webpage<sup>163</sup> gives more information on our complaints process.

11.4. If installers or property owners have concerns about a decision which we have made, they can lodge a complaint using our complaints procedure or request a review of the decision. Please see the right of review section from paragraphs 9.41 to 9.50.

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<sup>163</sup> <https://www.ofgem.gov.uk/about-us/contact-us/complaining-about-ofgem>



## **Appendix 1 – Glossary**

The terms below are intended to assist users of this guidance. However, please note that where these definitions overlap with definitions in the BUS regulations, the BUS regulations have precedence.

### **A**

#### **AUTHORISED REPRESENTATIVE**

The authorised representative is the individual who sets up the BUS installer account with us and confirms that the company will take legal responsibility for all activity undertaken on the BUS account associated with it.

### **B**

#### **BUS VOUCHER**

A voucher issued by us on behalf of the Secretary of State, in the form of an email. This is issued after a voucher application is properly made, has been assessed and we are satisfied that all the eligibility requirements have been met. Vouchers can be redeemed for the relevant grant amount once an installation is commissioned, and all evidence required for redemption is provided to us.

### **C**

#### **CUSTOM-BUILD**

Custom build refers to properties created by a builder who is contracted by an individual. This type of building is considered to be a “self-build”. For further information, please refer to “self-build” below.

### **E**

#### **ELIGIBLE TECHNOLOGIES**

The BUS provides upfront capital grants to support the installation of specific technologies, which must meet the requirements of the BUS regulations, the latest MCS standards and the standards approved and published by the Secretary of State. The eligible technologies under

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BUS are Air-Source Heat Pumps, Biomass Boilers and Ground Source Heat-Pumps (including water source heat pumps and shared ground loops).

## ELIGIBILITY CRITERIA

These are a range of eligibility criteria that must be met for a technology and property to be eligible under BUS. These are set out in the BUS regulations and installers need to provide information and evidence to demonstrate eligibility at both the voucher application and voucher redemption application stages. The evidence requirements are set out in the BUS regulations and guidance.

## EMISSIONS CERTIFICATE

All biomass boilers must have an eligible emissions certificate to be eligible under the BUS. The emissions certificate shows that the installation meets the scheme's air quality standards, and it contains information about the product and laboratory where the testing took place, along with information on the emissions and tested fuel types for the product. An emissions certificate meets the requirements where it is issued by a testing laboratory which is accredited to the standard approved by the Secretary of State.

## M

### MCS

The MCS (Microgeneration Certification Scheme) is a certification scheme for microgeneration installation companies and products. It defines and maintains consistent standards, providing confidence to consumers who wish to invest in small-scale technologies that produce electricity and heat from renewable sources.

## P

### PROPERLY MADE

Properly made is the point at which we consider a voucher application to be formally made and we have all the necessary information to make an assessment on eligibility. The BUS regulations specify this is at the point at which all information required as part of a voucher application has been submitted and all requests for further information have been addressed. At voucher application stage, an application can only be considered properly made once the

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property owner has provided all the required information to confirm consent and their identity in addition to information submitted by the installer.

#### PROPERTY OWNER CONSENT

Property owners are required to confirm that they have consented to an application for a BUS grant being made on their behalf for their property. We request this after an installer has submitted a voucher application to us on their behalf. We contact the property owner to confirm their consent and verify their identity. We inform the installer if consent has been provided. The voucher application cannot be processed if we don't receive the property owner's consent.

#### PEL

The Ofgem Product Eligibility List (PEL) is an administrative tool that makes it easier to identify products that could be eligible for the BUS. All products on the Ofgem PEL are taken from the MCS certified product directory, where they also meet the standards required by BUS. The Ofgem PEL is not exhaustive – there may be some products on the MCS certified product directory that do meet the requirements for BUS but are not on the Ofgem PEL.

Where a specific biomass boiler is not on the PEL, an emissions certificate meeting the scheme requirements for that product can be provided as evidence at voucher redemption stage if it meets the air quality requirements.

The PEL does not consider SCOP of heat pumps and installers need to calculate this separately.

For the full explanation of the Ofgem PEL, please see the section beginning at paragraph 3.57

## **S**

#### SELF-BUILD

Eligible self-builds are new builds which were built using either the resources or labour of an individual. This includes buildings where a builder is contracted by an individual to create a 'custom-built' property or where a private individual builds it as a DIY 'self-build' project. Both of these types of properties are treated as self-builds. Eligible self-builds cannot have been

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owned wholly or partly by a person who is not an individual while they were built and cannot be part of an excluded property development.