

## Boiler Upgrade Scheme: Account Creation Guidance v1

Subject	Details
<b>Publication date:</b>	07 April 2022
<b>Contact</b>	Cissy Edathanal, Senior Policy Advisor  Hiral Shah, Senior Policy Advisor  Nikhil Kotecha, Senior Policy Advisor
<b>Team:</b>	Policy, Delivery & Schemes
<b>Email:</b>	<a href="mailto:Future.HeatPolicy@ofgem.gov.uk">Future.HeatPolicy@ofgem.gov.uk</a>

This guidance is for MCS certified installers who wish to engage in the Boiler Upgrade Scheme (BUS). It describes the process of creating an installer account and adding users to that account so that installers can apply for and redeem BUS vouchers.

© Crown copyright 2022

The text of this document may be reproduced (excluding logos) under and in accordance with the terms of the [Open Government Licence](#).

Without prejudice to the generality of the terms of the Open Government Licence the material that is reproduced must be acknowledged as Crown copyright and the document title of this document must be specified in that acknowledgement.

Any enquiries related to the text of this publication should be sent to Ofgem at:  
10 South Colonnade, Canary Wharf, London, E14 4PU.

This publication is available at [www.ofgem.gov.uk](http://www.ofgem.gov.uk). Any enquiries regarding the use and re-use of this information resource should be sent to: [psi@nationalarchives.gsi.gov.uk](mailto:psi@nationalarchives.gsi.gov.uk)

## Contents

<b>Boiler Upgrade Scheme: Account Creation Guidance v1 .....</b>	<b>1</b>
<b>1. Introduction.....</b>	<b>4</b>
Boiler Upgrade Scheme overview .....	4
Who is this Guidance for? .....	4
Related publications and useful links.....	5
Queries and further information .....	5
<b>2. Before you create an account.....</b>	<b>6</b>
Section summary .....	6
What is an account? .....	6
Who can create an account? .....	7
Authorised Representative .....	7
What is needed to create an account?.....	9
<b>3. How to create an account.....</b>	<b>11</b>
Section summary .....	11
Account creation form .....	11
Guide to filling out the account creation form.....	11
About your business .....	11
About you .....	14
Other users on the account (optional).....	16
Confirmation .....	17
<b>4. After account creation.....</b>	<b>19</b>
What to expect once you have submitted the account creation form .....	19
Errors with the information submitted .....	19

## 1. Introduction

### Boiler Upgrade Scheme overview

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

1.2. The BUS will provide upfront capital grants to support the installation of heat pumps and, in limited circumstances, biomass boilers in domestic and non-domestic buildings. Grants of £5000 will be available for air source heat pumps (ASHPs) and biomass boilers, and grants of £6000 will be available for ground source heat pumps (GSHPs). Grants will not vary by capacity of the installation, which must not exceed 45 kWth.

1.3. In October 2021, the Department for Business, Energy and Industrial Strategy (BEIS) issued the 'Future Support for Low Carbon Heat: Boiler Upgrade Scheme' government response.<sup>1</sup> It provided the government response to the Clean Heat Grant section of the 'Future support for low carbon heat' consultation that closed in July 2020, and to the consultation 'Clean Heat Grant: Further policy design proposals', which closed in March 2021. The government response changed the name of the Clean Heat Grant to the Boiler Upgrade Scheme.

1.4. MCS certified installers, or installers certified by an equivalent scheme, will apply to Ofgem for a voucher on behalf of the property owner, who then must consent to the application. Vouchers for ASHPs and biomass boilers will be valid for 3 months and vouchers for GSHPs will be valid for 6 months. Vouchers will be valid from the time of issue. Installers will then apply to Ofgem to redeem the voucher once the installation is complete. It is anticipated that the full grant value will be passed to the property owner and this deduction is shown on any quote and invoice provided to them. Grant payments will be made direct to the installer.

### Who is this Guidance for?

1.5. From 11 April 2022, installers will be able to create a BUS account and set up their users ahead of the scheme regulations coming into effect on 22 May 2022 hence opening to applications and redemptions on 23 May 2022.

---

<sup>1</sup> [Boiler Upgrade Scheme Government Response](#)

1.6. This guidance is for installers of heat pumps and biomass boilers who wish to participate in the BUS and apply for BUS vouchers. It sets out what a BUS account is and the process of how to create one.

1.7. Ofgem will be publishing comprehensive scheme guidance before the scheme opens to applications on the 23 May 2022.

## Related publications and useful links

- [BEIS Future support for low carbon heat consultation](#)
- [BEIS Clean Heat Grant: further policy design proposals consultation](#)
- [BEIS Government response on the Boiler Upgrade Scheme](#)
- [Boiler Upgrade Scheme \(England and Wales\) Regulations 2022](#)
- [Ofgem Consultation on the Administration of the Boiler Upgrade Scheme](#)
- [Ofgem Consultation response on the Administration of the Boiler Upgrade Scheme](#)

## Queries and further information

1.8. For further information on Ofgem’s administration of the BUS please visit our webpage on Ofgem’s website: <https://www.ofgem.gov.uk/environmental-and-social-schemes/boiler-upgrade-scheme-bus>.

1.9. Any questions on this BUS guidance, or on Ofgem’s administration of the BUS, should be directed to the Future Heat Policy team on [Future.HeatPolicy@ofgem.gov.uk](mailto:Future.HeatPolicy@ofgem.gov.uk).

1.10. We take a zero tolerance approach to fraud, if anyone has any concerns about suspected fraud this can be reported by emailing us at [counterfraud@ofgem.gov.uk](mailto:counterfraud@ofgem.gov.uk).

## 2. Before you create an account

### Section summary

Installers who wish to participate in the BUS will need to create an account with Ofgem to do so. From 11 April 2022, installers will be able to create their account, add additional users to their account and configure user permissions ahead of the scheme opening to applications on 23 May 2022.

### What is an account?

2.1. The BUS will open to applications on 23 May 2022. Prior to making an application for a voucher, installers will be required to create a BUS installer account with Ofgem.

2.2. From 11 April 2022, we will be allowing installers who intend to make applications for a BUS voucher to create their installer account ahead of the scheme opening for applications. Account creation is a necessary first step before being able to submit voucher applications. We will need to process account creation requests. We therefore encourage installers to create their accounts before 23 May 2022.

2.3. Accounts can be created at any time during the lifetime of the scheme.

2.4. Creating an account will allow installers to:

- Receive an Account ID which will need to be submitted for each BUS voucher application. Submitting this Account ID will mean that organisation details (eg MCS number, business address, bank account details) do not need to be re-submitted and verified for each application.
- add additional users for the organisation

2.5. This account is purely for administrative purposes. It is not our intention to publish a list of BUS installers.

2.6. Making an account does not mean that any BUS voucher applications will be successful. Making an account is not accreditation on the scheme. For clarity, there is no such thing as a BUS-accredited installer and installers should not advertise themselves as that.

## Who can create an account?

2.7. Only MCS certified installers will be eligible to create an account and apply for BUS vouchers. You will need to be fully certified and provide your MCS number as part of the account creation process. As mentioned above there is no such thing as a BUS installer.

2.8. Accounts can be set up for both registered companies or other entities, such as sole traders. Those creating an account will be required to verify their identity as part of the account set up. Please see section: What is needed to create an account.

### *Company accounts*

2.9. Where it is a company, we will require that the individual setting up the account is someone with the legal authority to act on the company's behalf. This person may be a Company Director or Company Secretary, and this will be checked against information held on Companies House.

2.10. This account contact will be the *Authorised Representative* for the organisation. This will negate the need for companies to provide separate 'letters of authorisation' to appoint key account contacts.

### **Authorised Representative**

2.11. The user creating the account will automatically become the *Authorised Representative* of the account. They will have all the available user permissions set out in Table 1 by default and will be the only user with *account management* permission. They will also be the account representative that Ofgem would contact where we may have questions or concerns related to the account activity.

2.12. Only the Authorised Representative will be able to edit the company details, such as MCS number, business address and bank account details. We do not anticipate these types of details changing often.

2.13. Authorised representatives will also be able to add or remove other users to the account and provide them with the appropriate level of permissions. The authorised representative will need to confirm that the business will take responsibility for the activity undertaken by those individuals by ticking a tickbox.

The existing authorised representative will need to get in contact with Ofgem via [BUS.accountcreation@ofgem.gov.uk](mailto:BUS.accountcreation@ofgem.gov.uk) to change the named authorised representative of an account and the new representative will need to be registered on Companies House and undergo the same identity and verification checks for the change to be successful.

### User permissions

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

2.15. When new users are added to the account, they will automatically be provided with standard user permissions unless *user management* permission is specifically requested for them.

2.16. Table 1 sets out the different user permission levels that can be assigned to users of a BUS installer account.

**Table 1: User permission levels**

Permission	Description
<p><b>Account management (only for authorised representative)</b></p>	<p>Ability to:</p> <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 address etc.</li> <li>• Add additional users to the account</li> </ul> <p>They will also have all the permissions that apply to the other user types.</p>
<p><b>User management</b></p>	<p>Ability to:</p> <ul style="list-style-type: none"> <li>• Add additional standard 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 will also have all the permissions that apply to the standard users.
<b>Standard user</b>	<p>Ability to:</p> <ul style="list-style-type: none"> <li>• Submit new voucher applications</li> <li>• Edit and manage existing applications</li> <li>• Redeem or cancel issued vouchers</li> <li>• Re-apply for applications where a voucher may have expired</li> </ul>

## What is needed to create an account?

2.17. You should ensure that you have the documents you need before you start the account creation process. This is so that the information and documents you provide to us are up-to-date, avoiding delays in our setting up of your account.

2.18. In order to prove your identity, you must provide a clear, digital copy of one of the following:

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

2.19. In order to show proof of your home address, you must provide a clear, digital copy of one of the following:

- a domestic utility bill from the last three months
- a council tax bill from the last three months.

2.20. In order to provide evidence of your business bank account, you must provide a digital copy of a business bank statement from the last three months.

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

2.22. 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)

## 3. How to create an account

### Section summary

To create your installer account, you will need to complete an account creation form and email it to us, alongside evidence to verify your identity. This section provides guidance on how you should complete the form and what evidence you need to provide.

### Account creation form

3.1. The installer account creation form will be an editable PDF.

3.2. For those that cannot access the editable PDF version, there will be an accessible Opensource Text file version.

### Guide to filling out the account creation form

3.3. This part of the guidance gives a step by step description of how to fill in the account creation form, including corresponding screenshots of the PDF version.

3.4. The account creation form should be filled out by the authorised representative of the business. The role of the authorised representative is described in Chapter 2. As such, this part of the guidance is addressed to the authorised representative.

3.5. The installer account creation form is available on the [Ofgem website](#)

3.6. Once you have completed the form, attach it to an email, alongside any evidence that we require, and send it to [BUS.accountcreation@ofgem.gov.uk](mailto:BUS.accountcreation@ofgem.gov.uk)

### About your business

3.7. In this section, you need to provide information which will allow us to identify your business and make payments to you if you successfully redeem a BUS voucher.

3.8. Your business must be MCS certified to take part in BUS. To evidence this, you need to provide your business's MCS certification number. This starts with the first three letters of your

business's certification body. You can find out more information about obtaining MCS certification on the MCS website: <https://mcs-certified.com/>

**Fig 1. What is your business's MCS certification number?**

**What is your business's MCS certification number?**

Your business must be a member of the Microgeneration Certification Scheme (MCS) to take part in the Boiler Upgrade Scheme.

This starts with the first 3 letters of your business's certification body, for example 'NAP-12345'

3.9. If your business is a company, you need to provide your company number. This helps us to identify your company. You can find your company number online: <https://find-and-update.company-information.service.gov.uk>

**Fig 2. What is your business's company number?**

**What is your business's company number?**

You can find this online: <https://find-and-update.company-information.service.gov.uk> (right click and choose 'open link in a new tab').

You do not need to provide this if you are a sole trader.

3.10. We also need you to provide and confirm your business's registered name. If your business is a company, this is what appears in the Companies House record. Companies must also confirm their registered name.

**Fig 3. What is your business's registered name?**

**What is your business's registered name?**

If your business is a company, this is what appears in the Companies House record.

You can find this online: <https://find-and-update.company-information.service.gov.uk>

3.11. If you trade under a different name to your business’s registered name, you need to provide your business’s trading name. This also helps us to identify your company.

**Fig 4. What is your business’s trading name?**

**What is your business’s trading name?**

You only need to provide this if you trade under a different name.

3.12. The next question asks for your business’s registered address. If your business is a company, this is what appears in the Companies House record. If you are a sole trader, this is where official correspondence should be sent. We will use this information to help identify your business and to communicate with you when needed.

**Fig 5. What is the registered address for your business?**

**What is the registered address for your business?**

If your business is a company, this is what appears in the Companies House record.

You can check this online: <https://find-and-update.company-information.service.gov.uk>

If you are a sole trader, this is where official correspondence should be sent.

**Building and street**

**Town or city**

**Post code**

3.13. You need to provide your business’s bank account details so that we can make payments to you if you successfully redeem a BUS voucher. Please check these carefully to ensure that they are correct. If you need to change these details at a later date, only authorised representatives will be able to make this change.

**Fig 6. What is your business bank account details?**

**What are your business's bank account details?**

This is where you want Ofgem to pay your business whenever a BUS voucher is successfully redeemed.

This must be a UK bank account that can accept payments in pound sterling.

The form consists of three vertically stacked input fields, each with a label to its left. The first field is labeled 'Account name', the second 'Sort code', and the third 'Account number'. Each field is a simple rectangular box with a thin border.

**About you**

3.14. In this section of the account creation form, we require authorised representatives to provide personal information that will allow us to run identity checks.

3.15. If your business is a limited company, you must be listed as active under the 'People' tab of the Companies House record for the business. You can find this information online: <https://find-and-update.company-information.service.gov.uk/>

3.16. If you are a sole trader, you will not be registered on Companies House. However, you still must complete this section so that we can verify your identity.

3.17. The first question asks for your full name. You should provide your name as it appears on the identity document you provide to us later on in the form.

**Fig 7. What is your full name?**

If your business is a limited company, you must be a company officer (for example, company director or company secretary), listed under the 'People' tab of the Companies House record.

You can find this online: <https://find-and-update.company-information.service.gov.uk>

**What is your full name?**

3.18. We ask for your work email address so that we can contact you about your account, applications and on other relevant matters regarding your engagement with the BUS. Please send us this form from the same email address so that we know you have access to it.

**Fig 8. What is your work email address?**

**What is your work email address?**

**Note:** You must use this email address to send the completed form to us.

3.19. We also require your telephone number, which we may use to contact you about your account when needed. This should be your work telephone number. It can be a landline or a mobile number.

**Fig 9. What is your telephone number?**

**What is your telephone number?**

3.20. In order to carry out identity checks, we need your home address. This should be the same address listed on the proof of home address document you provide to us later on in the form. We will not use your home address to contact you.

**Fig 10. What is your home address?**

**What is your home address?**

We need this to be able to run our identity checks.

**Building and street**

**Town or city**

**Postal code or zip code**

**Country**

3.21. We also need your date of birth for the purposes of our identity checks.

**Fig 11. What is your date of birth?**

**What is your date of birth?**

For example, 22 02 1979.

We need this to be able run our identity checks.

**Other users on the account (optional)**

3.22. You will be able to add details of five additional users on the account. Adding additional users is optional. If you require more than 5 additional users, please inform us in the body of your email when you submit your account creation form and we will be in contact to arrange this if possible.

3.23. Please choose new users carefully. We will not verify or run background checks on any other users added to the account, and we will hold your organisation accountable for the accuracy of the information they provide.

3.24. For each user you want to add to your account, you will need to provide their work email address. We will only accept applications from email addresses that match those specified as being users on the account.

You will also need to specify if the additional users can manage other users on the account.

**Fig 12. Providing the details of additional users**

**Additional user 1**

Email address

  
  

Can they manage other users on the account?

Yes  
 No

**Additional user 2**

Email address

  
  

Can they manage other users on the account?

Yes  
 No

## Confirmation

3.25. To complete the form, you must confirm that the two statements set out in this section of the form are true.

3.26. You must confirm that you have the legal authority to act on behalf of your business with respect to providing any data and information that Ofgem may need to administer the Scheme.

3.27. You must also confirm that you are happy to be your business's authorised representative for the BUS. This means that you will be responsible for acting on any correspondence received from Ofgem regarding your company's engagement with the BUS.

3.28. When you are satisfied you can confirm these two statements are true, tick the box provided to give your confirmation to us.

**Fig 13. Check the box to confirm**

### **5. Check the box to confirm**

I confirm the above that I:

- have the legal authority to act on behalf of my business with respect to providing any data and information that Ofgem may need to administer the scheme
- am happy to be my business's authorised representative for the scheme

## 4. After account creation

### What to expect once you have submitted the account creation form

4.1. We will run our verification checks on the information submitted on the account creation form. If we approve the account creation, the authorised representative will receive an email confirming:

- The creation of the account
- The Account ID

4.2. Once you have received your Account ID, you will be able to submit BUS applications following 23 May 2022, when the scheme opens to applications.

### Errors with the information submitted

4.3. If you notice an error, please contact [BUS.installer@ofgem.gov.uk](mailto:BUS.installer@ofgem.gov.uk)