Boiler Upgrade Scheme (BUS)
Summary of Updates in the BUS Property Owner Guidance V5.2

Introduction

This document outlines the updates that we have made in the latest iteration of the Boiler Upgrade Scheme property owner guidance. The paragraph numbers referred to in this document relate to the paragraph numbers at the time of updating.

Overview of amendments to Boiler Upgrade Scheme Property Owner Guidance

Version 5.2

Chapter 2 — Roles and Responsibilities

Role of MCS as a certification scheme & Role of Consumer Codes

2.07-2.22 updated content and contact information concerning consumer codes, including: MCS, HIES, and RECC

Version 5.1

Chapter 1 - Introduction

1.02-1.05 Added new uplifted grant of £9,000 for air-to-water or ground source heat pumps in eligible off-gas grid properties.

Chapter 2 — Roles and Responsibilities

Role of Consumer Codes

2.09-2.12 updated content and contact information concerning consumer codes, including: MCS, HIES, and RECC.

Chapter 3 —Eligibility requirements

3.08-3.13 New content relating to property eligibility, including for the uplifted grant for eligible off-gas grid properties.

Chapter 4 — Application Process

4.18 added installer quote obligations in relation to the uplifted off-gas grid grant.

4.22 updated off-gas grid content in 'Step 3 – your installer applies for a BUS voucher'.

4.27-4.29 added new section on requirements for eligible off-gas grid properties

From 4.33 Confirming your consent

- How Ofgem contacts owners, and updated wording on consent

- ID verification explained more clearly

4.61 updated wording relating to incorrect details

Version 5

Throughout the document

- Amendments to text to improve clarity and accessibility.

Chapter 1 — Introduction

Structural Changes

- V5 significantly rewrites and shortens the introduction.
- References to policy background and scheme budgets (extensive in V4.1 paragraphs 1.1–1.8) are removed.
- V5 orients immediately toward property owners, rather than providing policy context.
- V5 removes graphics (e.g., Figure 1) present in V4.1, replacing them with clearer text flow.

Additions in V5

- Reframing in an accessible, plain-English style.1.05 Inclusion of a "What do I need to know now" paragraph, containing a brief overview of key scheme requirements, which are explained in further detail later in the guidance.
- Early note that property owners cannot seek pre-approval from Ofgem.
- Clarification that guidance is not legal advice.

Deletions in V5

- Budget data (paragraphs 1.4–1.8)
- Heat pump technology explanations (now set out in Chapter 3)
- Regulatory citations throughout chapter

Chapter 2 — Roles and Responsibilities

Structural Changes

- V5 reorganises roles into a consistent format (roles of: Government → Ofgem → Installers → Property Owners → Consumer Codes → MCS).

Substantive Changes

Role of Government

- V4.1 provides detailed regulatory powers (approving standards, setting budgets, etc.).

2.01 V5 simplifies: DESNZ sets policy & rules.

Role of Ofgem

- V4.1 emphasises Ofgem's statutory powers.

2.02 V5 focuses on property owner-relevant functions (guidance, assessing eligibility, audits, payments). New emphasis in V5 that Ofgem may attend properties for audit purposes.

Role of Installers

2.04 V5 –places greater emphasis on installers' obligations to manage application accuracy, apply the grant discount upfront, and provide clear information where requested. Removes regulatory references.

Role of Property Owners

2.06 V5 adds additional obligations:

- retain documentation such as quotes or invoices
- allow access to properties for audit purposes

Consumer Codes

From 2.09 V5 condenses material; adds direct contact routes for HIES/RECC but in a more concise format.

MCS

From 2.10 V5 simplifies explanation of MCS and verification contact.

Chapter 3 —Eligibility requirements (V4.1 Chapters 3 & 4 merged into V5 Chapter 3)

Major structural changes and more accessible wording throughout

- V4.1 had a separate Grant chapter and long technical Eligibility chapter.
- V5 merges and presents eligibility far more succinctly, focusing on what property owners need to know regarding eligible properties and technologies.

Major Updates in V5

- EPC requirement changes:
  - V4.1: EPC mandatory (except self-build).
  - V5: EPC may not be required in some cases (reflecting 2026 regulation amendments).
- Simplified wording relating to the key eligibility criteria.
- Heating requirement changes:

3.22 new text added on the ability to retain low-carbon heating systems that can operate alongside a BUS heat pump in some cases.

Additions in V5

3.10 Simplified lists of exclusions (self-build rules now placed in Appendix 1).

- Explanations of:

3.24 What installers must check?
3.26 What property owners must confirm?

Deletions in V5

- Simplified wording and removal of installer-specific information (which can be found in the Installer Guidance):
  - SCOP 2.8 requirement for all heat pumps (only air-to-water systems must achieve this requirement)
  - Technology-specific tables
  - Shared ground loop specifications
  - Hybrid system definitions
  - Rural/urban biomass rules
  - Commissioning & capacity limits
- Grant tables removed

Chapter 4 — Application Process

Structural changes and simplified wording throughout

- V4.1 included detailed regulatory process with vouchers, deadlines, evidence, hybrid consent scenarios.
- V5 has been amended to make it much more property owner-oriented and streamlined.

Additions in V5

- Clearer explanations of:

Throughout the chapter - Step-by-step application process

4.07 New section on "Understanding your technology options", followed by a reiterative paragraph on energy efficiency measures, such as insulation.

From 4.13 What to expect from your installer

From 4.32 Confirming your consent

  - How Ofgem contacts owners
  - ID verification explained more clearly

- New wording on accessibility improvements:

4.51 Assisted digital route.
4.52 Welsh language support

From 4.54 Installers redeeming your voucher

From 4.60 A new section "If something changes or goes wrong" to provide helpful information on issues relating to consent, incorrect voucher validity, or fraud concerns.

From 4.64 a clearer, more streamlined section on complex property ownership scenarios

- Changes have been made across the following areas of technical content, which are more installer-focused (still included in the Installer Guidance):
  - Detailed EPC exemption routes
  - Technology-specific evidence requirements
  - Commissioning date rule (now greatly simplified)
  - Detailed LOA tables (now summarised)
  - Power of Attorney instructions (simplified)

Notable change

V5 adds a graphic-free journey summary, simplifying the lengthy process maps in V4.1.

Chapter 5 — Audit & Compliance

Structural Changes

- V4.1 contained extensive regulatory references; V5 has removed these to streamline information.

Additions in V5

- New wording to make it clear to property owners that:
  - audits are routine, and
  - being audited does not imply wrongdoing.

- Clearer explanation of what may be requested, and what you may be asked to do.

  From 5.08 Evidence that may be requested as part of an audit investigation expanded to include utility bills, photos of the previous heating system, and purchase receipts/quotes.

From 5.15 Clearer, slimmed down section explaining fraud and scheme abuse

Deletions in V5

- Removal of:
  - reference to BUS Regulation, to improve readability
  - detailed lists of evidence type that are installer-focused (e.g., VAT exemption letters, structural invoices). These can still be found in the Installer Guidance.
  - list of non-compliance types relating to installers, with retention only of ones relevant for property owners
  - enforcement mechanisms relevant only to installers (e.g., withholding, recouping)

Changes

- V5 removes complex compliance language and frames processes more simply.

Chapter 6 — Queries, Complaints, Feedback (V4.1 Chapter 8)

Structure Changes

- Simplified from several subsections to a more compact format.

Additions in V5

6.06 Clarification that installers must request statutory reviews (property owners cannot).

From 6.08 Stronger guidance about which body to contact (installer, consumer code, DESNZ, Ofgem).

Deletions

- Removal of:
  - Reporting frequency (monthly/quarterly cadence)
  - Full complaints process tables
  - Right of review detailed rules (this is information for installers)

Appendices

Appendix 1 — Self-builds

- V5 moves all self-build content to the appendix (previously embedded in eligibility chapter).
- Adds caveats:
  - evidence must show ownership, funding, non-developer status
- Simplifies examples.

Appendix 2 — Useful links

- V5 reduces list from V4.1.
- Removes:
  - DESNZ historic consultations
  - outdated policy documents