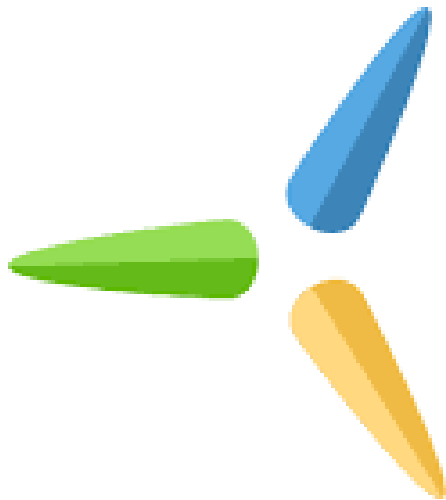




**In Association With**



**Content**  
Renewables



# Overview

Surveyours have secured a long term PAS2035 Retrofit Assessment Contract for ECO4, LAD & HUG Schemes on behalf of Content Renewables.

The properties will be spread across Mainland UK.

ALL the properties provided on the shared Google Worksheet (see 'Appointment Booking & Status Updates) have been pre-qualified by Content Renewables.

Our role within the supply chain is to Conduct a Basic Draft EPR to confirm the property qualifies as being 'D' Rated or below and complete a PAS2035 Retrofit Assessment along with all Technical Surveys indicated on the shared Google Worksheet for qualifying properties, or a Draft EPR for non qualifying properties.

All survey submission is to be done via Content Renewables CoreLogic Platform.

## **If the property has a current SAP rating of 'D' or below;**

- Proceed to complete a Full PAS2035 Retrofit Assessment +
- All Energy Efficiency Measure Surveys indicated on the shared google sheet (Using Content Renewables CoreLogic Platform).
- Obtain a Copy of;
  - Proof of Income/Benefits, Utility Bill & Council Tax Letter
  - Signed Content Renewables T&C's, Right to Cancel & Data use Forms
- Submit a Post Survey Outcome Report (SF006)

## **If the property has a current SAP rating of 'C' or Above or any of the documents listed above are not available or complete;**

- Abandon the survey
- Submit the Draft Pre EPR via iAuditor Form SF006 'Post Survey Outcome Report' to receive an Abandoned Survey Fee of £45.00 (Ex VAT)

# Survey Process

The funding applies to D, E, F & G Rated Properties, for the measures listed below only;

Loft Insulation

Cavity Wall  
Insulation

Room in Roof  
Insulation

Under Floor  
Insulation

Air Source Heat  
Pump

Solar PV

High Heat Retention  
Storage Heaters

External Wall  
Insulation

We have been instructed to create an EPR to confirm qualification, followed by a Full PAS2035 Retrofit Assessment + all Technical Surveys indicated on the Shared Google Work Sheet

**The Property is above a D Rating**

Save the Pre Draft EPR

Submit via Post Survey Outcome Report (SF006) to claim an 'Abandoned Survey' Fee

The Property is D Rating or Below

Complete Full Retrofit Assessment Via CoreLogic

Complete all Technical Surveys indicated on Sheet

Collect documents (as listed on Page 2 of this guide)

Submit via Post Survey Outcome Report (SF006)

# Registration & Data Access

## How to be Included

If you feel you are competent to conduct these surveys, as instructed for this particular project, you will need to provide your 'Pairing Code' for either Stroma's 'ECO Surv' or ECMK/Core Logic's PASHub platforms (whichever you prefer to use). You can email this information to [antony@surveyours.co.uk](mailto:antony@surveyours.co.uk). Receipt of this information will be considered as registration for the project.

## How to Access the Property Data

You will then receive an invitation into a shared Google sheet. This is a list of the properties which require assessment under this scheme. You can select, contact and arrange your own diary appointments from this list. It is important, for all users, that the status is correctly set next to each property activity (See Appointment Booking & Status Updates).

The Shared Sheet '*Status*' & '*Surveyor*' Columns have Pre-Populated Drop Down Lists and the '*Date*' Column has a Pop Up Calendar.

**It is important that these columns are only used with the options provided.** Manually typing into these fields effects the formatting of the shared sheet. Any additional information can be manually entered into the '*Comments*' Column.

**DO NOT CUT & PASTE THE ROWS, COLUMNS OR FIELDS.** This will seriously effect the sheets operation and requires completely reformatting when this happens.

## How to Access the 'Post Survey Outcome Report' (SF006)

You will also be sent your 'Log in' details for our iAuditor Survey Reporting App. This can be downloaded from Appstore for Apple or Playstore for Android. You will need to submit a 'Post Survey Outcome Report' (SF006) after every survey to report the outcome.

# Appointment Booking & Status Updates

When making your calls to arrange survey appointments, you are calling from;

*"Surveyours, on behalf of Content Renewables, regarding the funded energy efficiency home improvements you are scheduled to receive".*

STATUS	DESCRIPTION/ACTION
<b>PENDING</b>	When you have secured consent for a survey but have not confirmed a Survey date, but have committed to following up, change the 'Status Column' to 'PENDING' and change the 'Date' Column to the date you will be calling back.
<b>BOOKED</b>	When you have secured consent and confirmed a survey date, change 'Status' Column to 'BOOKED' and change the 'Date' Column to the date of the survey.
<b>CANCELLED</b>	When the customer no longer wants to proceed, change 'Status' Column to 'CANCELLED' and change the 'Date' Column to the date of the call.
<b>NON-COMPLIANT</b>	When the phone conversation reveals the property is unsuitable for the scheme (eg: already above a D Rating), change 'Status' Column to 'NON-COMPLIANT' and change the 'Date' Column to the date of the call.
<b>WRONG NUMBER</b>	When the number provided is not in service or is not correct for the property, change 'Status' Column to 'WRONG NUMBER' and change the 'Date' Column to the date of the call.
<b>ABANDONED</b>	When, at the survey, the Draft EPR shows the required SAP Uplift cannot be achieved, change 'Status' Column to 'ABANDONED' and change the 'Date' Column to the date of the Draft EPR Survey submission.
<b>COMPLETE</b>	When a full Retrofit Assessment + EEM's have been completed & Submitted, change 'Status' Column to 'COMPLETE' and change the 'Date' Column to the date of completed Survey submission.