



**In Association With**



# Overview

Surveyors have secured a long term PAS2035 Retrofit Assessment Contract for ECO4, LAD & HUG Schemes on behalf of Warma UK.

Scheme	Area	Qualification
ECO4	Mainland UK	SAP Rating E, F or G
LAD/HUG	Defined Areas	SAP Rating D, E, F or G

- All Retrofit Assessment Survey submissions will be via Warma UK CoreLogic PASHub Platform
- All technical (EEM) Surveys submissions are to be done via Surveyors Safety Culture App Forms (SF007 – SF011)

Apply a 'Fabric First' approach to the addition of EEM Surveys. Prioritising applicable 'Primary Measures' first, complimented by applicable 'Secondary Measures' (See Survey Process) to ensure both best practice and installation practicality aims are achieved.

## **If the properties Draft EPR shows a Qualifying SAP Rating for the Scheme Funding Type;**

- Proceed to complete a Full PAS2035 Retrofit Assessment +
- All Energy Efficiency Measure Surveys identified during the EPR Survey
- Submit a Post Survey Outcome Report (SF006)

## **If the properties Draft EPR shows a Non-Qualifying SAP Rating for the Scheme Funding Type;**

- Abandon the survey
- Submit the Draft Pre EPR via iAuditor Form SF006 'Post Survey Outcome Report' to receive an Abandoned Survey Fee

# Survey Process

The funding applies to the installation of the measures listed below

## Primary Measures

Loft  
Insulation

Cavity Wall  
Insulation

Room in Roof  
Insulation

Solar PV

HHRESH

Non-Condensing  
Boiler Replacement

## Secondary Measures

Internal Wall  
Insulation

External Wall  
Insulation

Air Source Heat  
Pump

Under Floor  
Insulation

We have been instructed to provide a Full PAS2035 Retrofit Assessment + any Applicable EEM Surveys on all qualifying properties.

The Property is a D or above SAP Rating

Save the Pre Draft EPR

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

The Property is E or below SAP Rating

Complete Full Retrofit Assessment via CoreLogic PASHub

Complete all Applicable EEM Surveys Forms SF007 – 011

Collect any documentation requested

Submit a 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 ECMK/Core Logic's PASHub platform. 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 need to be a Registered Member of Surveyours Sub-Contractors Group. Once registered you will be able to access our 'Daily Survey Updates' List of which this contract will form a part.

From there you can select, contact and arrange your own diary appointments. It is important, for all users, that the status is correctly set next to each property activity (See Appointment Booking & Status Updates).

The '*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. Additional information should be 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 'Energy Efficiency Measure' Surveys App

You will need to download the 'Safety Culture' App. This can be downloaded from Appstore for Apple or Playstore for Android. We will then send you Log-In details to access Surveyours Survey Forms SF006 - SF011

# Appointment Booking & Status Updates

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

*"Surveyours, on behalf of Warma UK, 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.