

## Customer Details

Customer Full Name	
Customer Telephone Number	
Customer Full Address	
Customer Post Code	
ECO4 Route & URN	<div> <div>HTHG</div> <div>DWP</div> <div>UDWP</div> <div>FLEX</div> </div>
Date of Receiving Data Match / Flex	
Occupancy Evidence	<div> <div>Utility Bill</div> <div>Mortgage Statement</div> <div>NHS Letter</div> <div>Other</div> </div>
Tenancy	<div> <div>Private tenant</div> <div>Owner occupied</div> <div>Social housing</div> </div>
Landlord	

## Scheme Type

Scheme	<div> <div>ECO4</div> <div>Great British Insulation Scheme</div> </div>
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## Pre-EPR

Assessment Date (Survey Date)	
Submission Date (Survey Lodgement Date)	
Property Type	<input type="checkbox"/> Flat <input type="checkbox"/> House <input type="checkbox"/> Park Home

Floor Area <small>m<sup>2</sup></small>	[Select and Input]	Input Amount Below:
0 - 72	98 - 199	
73 - 97	200+	

High B	High C	High D	High E	High F	High G	Exact SAP Rating
Low B	Low C	Low D	Low E	Low F	Low G	

## Pre-RdSAP

Retrofit Assessor	
RdSAP Reference Number	
Tenure	<input type="checkbox"/> Private Tenant <input type="checkbox"/> Owner Occupied <input type="checkbox"/> Social Housing Tenant
Year of Property	
IF INSTALLING HEATING MEASURES	
Full Set of Heating Controls?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Which Heating Controls are present?	<input type="checkbox"/> Boiler Programmer <input type="checkbox"/> Room Thermostat <input type="checkbox"/> TRVs <input type="checkbox"/> Smart Thermostat
Is the Property On-Gas?	<input type="checkbox"/> Yes <input type="checkbox"/> No

## Post-RdSAP

Final SAP Rating	
Post Fuel Type	

## Installing FTCH? Input the Pre Main Heating Source!

Bottled LPG Room Heaters	
Solid Fossil Room Heaters	
Gas Fire with Back Boiler	
Gas Room Heaters	
Electric Room Heaters including direct acting room heaters	
No heating present	
Other	

## Retrofit Coordinator

Retrofit Coordinator Name	
Retrofit Coordinator Address	
Retrofit Coordinator Trustmark Number	

# **TABLE OF MEASURES**

PAS Measure	Material used	Accredited Installer Company	Installers Certification Body	Installer	PAS Certificate  Tick (when the company is input) to use the database value. Otherwise, enter it yourself!
1.)					
2.)					
3.)					
4.)					
5.)					
6.)					
7.)					
8.)					
9.)					
<u>MCS Measures</u>			Installer	Certificate Number	
1.)					
2.)					

## Product Details

Internal Wall Insulation		
Cavity Wall Insulation		
External Wall Insulation		
Loft Insulation	<div>&lt;=100</div> <div>&gt;100</div>	<div>Start depth</div> <div>Final depth</div>
Room in Roof Insulation		
Flat Roof Insulation		
First Time Central Heating		
Gas Boiler Upgrade		
Air Source Heat Pump		
Solar PV		
Heating Controls (USUAL PRODUCTS LISTED BELOW)  ESI - ES RTP4RF+ EPH Controls, CP4, ErP Class VIII  JIANGXI AVAN FLOW HVAC TECH TRV  RADBOT 1 SCV100 ErP Class VIII Drayton, Wiser, ErP Class VIII control type 3		
Electric Storage Heaters (USUAL PRODUCTS LISTED BELOW)  Gabarron, Ecombi HHR, ECOHHR10 Gabarron, Ecombi HHR, ECOHHR20 Gabarron, Ecombi HHR, ECOHHR30 Gabarron, Ecombi HHR, ECOHHR40		

## SPV

kWp	Inclination	Orientation

## Heating Controls

	Total on Survey	Total Post-Install
Radiators		
Of those, how many have TRVs?		
Towel Rails		-
Of those, how many have TRVs?		-
TTZCs	-	

## Retrofit Coordination

Coordinator Project Ref (Prop No, Postcode)	
Ventilation Date	
Assessor ID Number	
Trustmark Project Number (TM Lodged)	

# **WALL & ROOF DIMENSIONS**



Property Section	Wall Construction	Room Height	Wall Perimeter	Wall Area / m²	Insulation Installed / m²	Roof Type	Roof Area / m²	Roof Insulation Installed / m²
Main Property	Main:			Main:	Main:			
	Alternative:			Alternative:	Alternative:			
Extension 1	Main:			Main:	Main:			
	Alternative:			Alternative:	Alternative:			
Extension 2	Main:			Main:	Main:			
	Alternative:			Alternative:	Alternative:			
Extension 3	Main:			Main:	Main:			
	Alternative:			Alternative:	Alternative:			
Extension 4	Main:			Main:	Main:			
				Alternative:	Alternative:			

# PROJECT DETAILS

ECO4 ROUTE:

UTILITY:

On-Gas?

ESG REF:

SUB:

TM No:

PROPERTY ADDRESS		
NAME		
PHONE NUMBER		
TENANCY		
PROPERTY TYPE		
RETROFIT ASSESSOR		
LANDLORD		
SURVEY DATE		
SURVEY LODGEMENT DATE		
MEASURE 1 POPT %	INSTALLER	
	DATE	
MEASURE 2 POPT %	INSTALLER	
	DATE	
MEASURE 3 POPT %	INSTALLER	
	DATE	
MEASURE 4 POPT %	INSTALLER	
	DATE	
MEASURE 5 POPT %	INSTALLER	
	DATE	
ADDITIONAL HEATING CONTROLS		
VENTILATION DATE		
HANDOVER DATE		
EPR JUMPS m <sup>2</sup>	→	

**EERF**

## ECO4 and the Great British Insulation Scheme Eligibility Requirements Form

### Introduction

This form is to be used to confirm the eligibility of properties receiving measures under either ECO4 or the Great British Insulation Scheme. The form may be completed onsite or offsite before the start of the project.

Ofgem expects that any additional evidence collected is handled in adherence with the Data Protection Act 2018<sup>1</sup>.

For a better understanding of how the data in this form will be used under the Great British Insulation Scheme or ECO4, please visit our website<sup>2</sup>.

Any evidence of electronically duplicated or forged signatures will be investigated. Any measures where suspected fraudulent activity or scheme abuse is detected will be rejected<sup>3</sup>.

Some sections of this form are scheme specific and have been labelled accordingly. If a section or question is not relevant, please leave it blank.

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<sup>1</sup> <https://ico.org.uk/for-organisations/uk-gdpr-guidance-and-resources/>

<sup>2</sup> <https://www.ofgem.gov.uk/environmental-and-social-schemes/great-british-insulation-scheme>.

<https://www.ofgem.gov.uk/publications/eco-privacy-notice>

<sup>3</sup> Please see chapter 8 in the ECO4 Delivery Guidance for further information.

Guidance	
Section A	<p><b>Occupier / Landlord and Premises Details</b></p> <p>The ECO4 and The Great British Insulation Scheme- Templates to evidence private domestic premises and social housing may be used if some evidence is not available. <b>The declaration must be completed and signed by the occupier and the relevant owner, private landlord or the social landlord.</b></p>
Section B	<p><b>FTCH (First-Time Central Heating) Declaration</b></p> <p>This section contains a declaration to be completed by the landlord or owner to declare that, where a heating system is installed, at no previous date was there a central heating system OR an electric storage heater that has now broken down or has a responsiveness of greater than 0.2 when assessed against SAP present in the premises. <b>This declaration must be signed by the owner or landlord (including social landlord).</b></p>
Section C	<p><b>Declarations and sign off:</b></p> <p>This section contains the following declarations:</p> <p><b>i. Blended Funding and Landlord Permission Declaration. To be completed and signed by the private landlord.</b></p> <p>This declaration is intended for landlords to declare that they give permission for the delivery of a measure(s) in a PRS property, and that the funding for measures delivered under ECO4 or the GB Insulation Scheme has not been blended with funding from other government schemes or grants.</p> <p><b>ii. Social Housing Declaration. To be completed and signed by the social landlord officer.</b></p> <p>The Social Housing Declaration allows the social landlord to confirm the following:</p> <ul style="list-style-type: none"> <li>➤ the pre-installation SAP or RdSAP assessment or EPC rating reflects the current characteristics of the premises.</li> </ul> <p>In addition, the social landlord officer should ensure any necessary permission for a retrofit has been obtained. The signatory must review the available evidence and records relating to the premises prior to signing this declaration.</p> <p><b>iii. Data Use Declaration</b></p> <p><b>To be completed and signed by the:</b></p> <ol style="list-style-type: none"> <li><b>1) Owner, if owner occupier tenure, or</b></li> <li><b>2) Landlord, if privately rented, or</b></li> <li><b>3) Social landlord officer if social housing.</b></li> </ol>

	<p>The General Data Protection Regulation (UK GDPR) requires anyone collecting personal data to give the data subject (i.e., in the case of ECO or the GB Insulation Scheme, the occupant or the landlord) a Privacy Notice. This declaration should be signed by the owner, landlord, or social landlord officer (depending on tenure type) to confirm that they have received and read a privacy notice, which explains how their data will be used.</p>
Section D	<p><b>Child Benefit Self-Declaration</b></p> <p>The Child Benefit Self-Declaration contains a declaration that the household income<sup>4</sup> does not exceed the relevant income threshold for the corresponding number of children. The relevant third party should also sign their section of the declaration to provide assurance that the person living at the premises is in receipt of Child Benefit and is not in receipt of any of the other qualifying benefits for either scheme, which can be found in either the ECO4 or GB insulation scheme. <b>The declaration should be signed by the occupier.</b></p>

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<sup>4</sup> Income means annual gross income from all sources, including housing-related benefits, before tax. This should be determined based on the preceding annual tax year which runs from 6th April to 5th April of the following year.

## A. Premises Details

Field 1 is optional if the property is social housing.

Scheme Route	Field	Response
	1. Name of Occupier or Landlord	
	2. Address of installation (including postcode)	
<b>ECO4 only</b>	3. Household eligibility <sup>5</sup>	Help to Heat Group Social Housing LA Flex In-Fill Supplier Flex
<b>GB Insulation Scheme Only</b>		General Eligibility Low-income and Social Housing In-fill LA Flex
<b>GB Insulation Scheme Only</b>	4. Council Tax Band	<div> <div>Band A</div> <div>Band B</div> <div>Band C</div> <div>Band D</div> </div> <div> <input type="checkbox"/> Band E           <div>Band F</div> <div>Band G</div> <div>Band H</div> </div>
	5. Tenure type	<div>Owner Occupied</div> <div>Private Rented</div> <div>Social housing</div>

<sup>5</sup> See Chapter 3 of the ECO4 Delivery Guidance for more information regarding the eligibility types.



	6. Verification method <sup>6</sup>	WHD Core Group <sup>7</sup> DWP Match <sup>8</sup> Supplier Declaration <sup>9</sup> Child Benefit <sup>10</sup> ECO Eligible Referral <sup>11</sup> LA Declaration <sup>12</sup> HTHG Benefit Letter <sup>13</sup> N/A (eg Social Housing)  Other <sup>14</sup> _____
	7. URN (If applicable) <sup>15</sup>	
	8. Occupancy evidence <sup>16</sup>	Utility Bill      Mortgage Statement NHS Letter  Other <sup>17</sup> _____
	9. Has the retrofit received funding from a government scheme? <sup>18</sup>	<div style="text-align: right;">Yes      No</div> If yes, list scheme: _____

<sup>6</sup> See Chapter 3 of The Great British Insulation Scheme Delivery Guidance or ECO4 Delivery Guidance

<sup>7</sup> '**WHD Core Group**' applies to England and Wales (but not Scotland) and may be selected where the supplier can produce a WHD Core Group notice at audit for the help to heat group member. A data link exists with the Department of Work and Pensions (DWP) so that help to heat group eligibility can be verified through a data matching exercise.

<sup>8</sup> '**DWP Match**' should be selected for measures where help to heat group eligibility has been verified using this method.

<sup>9</sup> '**Supplier declaration**' should be selected where 'eligibility type' also has 'supplier declaration'.

<sup>10</sup> '**Child Benefit**' may be entered where a supplier can produce a Child Benefit Self-Declaration at audit.

<sup>11</sup> Only suppliers that have signed up to the **ECO Eligible Referrals (EER)** route with DWP should select this option.

<sup>12</sup> Suppliers should select '**LA Declaration**' for measures where help to heat group eligibility has been verified using this method.

<sup>13</sup> '**HTHG Benefit Letter**' should be selected where DWP match is not available.

<sup>14</sup> '**Other**' should only be selected in exceptional circumstances when agreed with obligated supplier and Ofgem in advance of commencing the project.

<sup>15</sup> Please see chapter 3 of either the [ECO4 Guidance: Delivery](#) or [Great British Insulation Scheme Delivery Guidance \(ofgem.gov.uk\)](#).

<sup>16</sup> Only required if property is private rented sector. Confirmation that domestic premises meet 'dwelling' definition from in The Energy Performance of Buildings (England and Wales) Regulations 2012 and The Energy Performance of Buildings (Scotland) Regulations 2008.

<sup>17</sup> See the [ECO4 Guidance: Delivery](#) or the [Great British Insulation Scheme Delivery Guidance \(ofgem.gov.uk\)](#) for other documents that may be used as evidence.

<sup>18</sup> Please see chapter 4 of the [Energy Company Obligation \(ECO4\) Guidance: Delivery](#) or Chapter 4 of [Great British Insulation Scheme Delivery Guidance \(ofgem.gov.uk\)](#) for other government schemes.

10. Details about Private / Social Landlord	
Type of landlord	Private landlord / managing agent      Social landlord <sup>19</sup>
Name of private landlord / managing agent / social landlord:	
Social landlord officer name <sup>20</sup> (if applicable):	
Social landlord officer job title (if applicable):	
Email:	
Contact Number:	
Full address including postcode:	
11. Has the PRS Exemption Register Evidence (if applicable) been provided? <sup>21</sup>	<input type="checkbox"/> Yes <input type="checkbox"/> No

<sup>19</sup> "Social landlord" is defined in Schedule 1 of the ECO4A Order 2023 may refer to a local council, housing association, housing authority or charity.

<sup>20</sup> "Social landlord officer" refers to the person completing this form on behalf of the social landlord.

<sup>21</sup> Evidence will be in the form of a screenshot of the PRS exemption register for pre-installation SAP band is band F or G

## B. FTCH (First-Time Central Heating) Declaration

This section is for ECO4 Only.

### FTCH Declaration (to be completed by the owner or landlord)

The signatory must review the available evidence and records relating to the premises prior to signing this declaration. The presence of a central heating system (including district and renewable heating) or an electric storage heater can be identified with reference to any available evidence within or records relating to the premises. Examples could include an old boiler, pipework, heating controls, radiators, storage heaters, or documents such as an EPC. Where such evidence exists, the measure(s) would be ineligible under this First-Time Central Heating provision.

"I declare that to the best of my knowledge, at no point prior to the installation of first-time central heating, did the premises have a wet central heating system nor, at no point since 1 April 2022, did the premises have a working, efficient electric storage heater(s)."

Landlord / owner full name:

Landlord / owner signature:

Date:

## C. Declarations and sign off

### i. Landlord Permission and Blended Funding Declaration (to be completed by the private landlord, social landlord officer, or owner-occupier)

Funding for measures delivered under ECO4 and the GB Insulation Scheme cannot be blended with funding from other government schemes or grants. Any measures outside of either schemes delivered to the same property would have to be installed either before or after measures are installed <sup>22</sup>.

I can confirm I am the ☐ Owner ☐ Landlord ☐ Management company of the property/properties listed above and hereby give my consent for the works to be completed. I understand I may be contacted by any organisation carrying out the installation works or providing the funding, Ofgem, or an energy supplier, to verify this declaration as confirmation of permission. By signing this declaration, I acknowledge that funding is being claimed through either the Energy Company Obligation (ECO4) scheme or the Great British Insulation Scheme, and I have not and will not seek any funding for such measures through other government schemes or grants. I hereby declare that all the information given above is true and accurate to the best of my knowledge.

### ii. Social Housing Declaration (to be completed by the social landlord officer)

Social landlord is defined in paragraph 4 of Schedule 1 of the Electricity and Gas (Energy Company Obligation) Order 2022.

By signing, I, **the social landlord**, declare to the best of my knowledge and belief that:

I can confirm that the SAP or RdSAP assessment is a true reflection of the property prior to the installation of the measure(s).

The premises are let at below market rate, or where the premises are currently void, have previously and will be let at below market rate<sup>23</sup>. I hereby declare that all the information given above is true and accurate to the best of my knowledge.

<sup>22</sup> See part 5 of the Electricity and Gas (Energy Company Obligation) Order 2023.

<sup>23</sup> Where social housing is let at or above the market rate, the property can be treated as private domestic premises, where the occupant meets the eligibility requirements. See section on PRS from paragraph 3.72 of the [ECO4 Guidance: Delivery V1.1 or Great British Insulation Scheme Delivery Guidance V0.1 \(ofgem.gov.uk\)](#) for more information.

**iii. Data Use Declaration** (to be completed by all relevant document signatories)

**I hereby declare that all the information given above is true and accurate to the best of my knowledge.**

By signing this declaration, **I confirm that I have received and read a privacy notice<sup>24</sup>** to explain how my data will be used, and that this has been shared with all members in the household who may be included or named in documents or information provided in the installation of this energy efficiency measure.

**I hereby declare that all the information provided in this form is true and accurate to the best of my knowledge, I confirm this by signing below.**

Owner / landlord / social landlord officer full name:		
Owner / landlord / social landlord officer signature:		Date:

<sup>24</sup><https://www.ofgem.gov.uk/publications/great-british-insulation-scheme-forms-and-tables>

## D. Child Benefit Self-Declaration

Please see Child Benefit definitions below.

### ii. Occupier declaration

**I, the occupier of the premises detailed above, declare** that I am in receipt of Child Benefit, and that for the corresponding number of qualifying children or young persons within this benefit, the threshold for single or combined annual gross income (from all sources) detailed in the table overleaf is not breached.

**I confirm that the information provided in this declaration is true and accurate.<sup>25</sup>**

Name ( <i>please print</i> )		Child Benefit Number <sup>26</sup>	
Signature		Date	
If no CHB, please provide National Insurance number:			

**I, the relevant third party<sup>27</sup>, declare** that, to the best of my knowledge, the person living at this premises detailed above is in receipt of Child Benefit; and is not in receipt of any of the other qualifying benefits listed in schedule 2 of the Electricity and Gas (Energy Company Obligation) Order 2022.

Name ( <i>please print</i> )			
Organisation			
Signature		Date	

<sup>25</sup> It is a criminal offence to knowingly make a false declaration and that the offence is punishable by a fine, imprisonment or both.

<sup>26</sup> Your Child Benefit number starts with 'CHB' and is made up of 8 numbers and 2 letters. For example, CHB12345678 AB. This number can be found on your Child Benefit award notice or on any correspondence from the Child Benefit Office. You can also contact the Child Benefit Office to get your number.

<sup>27</sup> See part 5 of the **Definitions** listed overleaf for more information.

## Definitions

1. "Single claimant" means a person who is not a member of a Couple.
2. "Couple" means:
  - two people who are married to, or civil partners of, each other and are members of the same household; or
  - two people who are not married to, or civil partners of, each other but are living together as a married couple.
3. "Child" and "qualifying young persons" means a person under the age of 16 (or under 20 if they are in approved education or training). A person shall be treated as responsible for a child or qualifying young person who is normally living with them or paying at least the same amount as Child Benefit (or the equivalent in kind) towards looking after them. More detail can be found on the government website for child benefit<sup>28</sup>
4. "Income" means annual gross income from all sources, including housing-related benefits, before tax. This should be determined based on the most recently completed annual tax year which runs from 6<sup>th</sup> April to 5<sup>th</sup> April of the following year.
5. "Relevant third party" means the person in the supply chain who has engaged with the consumer regarding the installation of the ECO measure. This could include, but is not limited to: the installer, operative, assessor or managing agent.
6. The other qualifying benefits, as listed in schedule 2 of the Electricity and Gas (Energy Company Obligation) Order 2022.

Type of claimant <sup>29</sup>	Number of children or qualifying young persons			
	1	2	3	4+
<b>Single claimant annual income</b>	≤ £19,900	≤ £24,800	≤ £29,600	≤ £34,500
<b>Member of a couple combined annual income</b>	≤ £27,500	≤ £32,300	≤ £37,200	≤ £42,000

The use of occupier self-declarations to prove receipt of Child Benefit is not sufficient by itself so alternative evidence, such as council tax letters to show the number of adults residing at the address, and the Child Benefit letter showing how many children within the household are supported by the payment, will also be required.<sup>30</sup>

<sup>28</sup> <https://www.gov.uk/child-benefit/eligibility>

<sup>29</sup> Note that you do not need to circle / mark the combination that matches your circumstances, the only confirmation required is to sign the declaration.

<sup>30</sup> For more information see paragraphs 3.139 – 3.143 of the [ECO4 Delivery Guidance](#) or [The Great British Insulation Scheme Delivery Guidance](#).

**PIPS**



## ECO4 & Great British Insulation Scheme Pre-Installation Project/ Measure Survey

### Introduction

The purpose of this form is to collect project/retrofit-level information before the installation of measure(s) takes place. The form may be completed offsite when installation is complete and can be used for both ECO4 and Great British Insulation Schemes.

The information and details recorded here must be true and accurate. If issues arise that raise doubts around the accuracy of the evidence and information provided, measures will be investigated and may be rejected. Any fraudulent activity, including misrepresenting details of the property, may also be reported to law enforcement agencies.

Any evidence of electronically duplicated or forged signatures will be investigated. Any measures where suspected fraudulent activity is detected will be rejected.

Ofgem also recommends that any additional evidence collected as part of these forms be handled as the final step in the process to adhere to Data Protection Act 2018 requirements<sup>1</sup>.

All photographic evidence in relation to a measure must be appropriate and in line with UK GDPR<sup>2</sup> and Data Protection Act 2018 requirements<sup>3</sup>.

For a better understanding of how the data in this form will be used under the Great British Insulation Scheme or ECO4, please visit our website<sup>4</sup>.

Please be aware that some sections are scheme specific – and have been labelled as so. If a section or question is not relevant to your scheme, please leave section blank.

Additional pages should be appended if there is not enough space in the fields provided.

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<sup>1</sup> [Data Protection Act 2018 \(legislation.gov.uk\)](https://www.legislation.gov.uk/ukpga/2018/52/section/1)

<sup>2</sup> Please note you may be required to provide photographic evidence alongside this document. Photographic evidence in relation to a measure must be appropriate and in line with UK GDPR and Data Protection Act 2018 requirements.

<sup>3</sup> [Guide to the UK General Data Protection Regulation \(UK GDPR\) | ICO](https://ico.org.uk/for-organisations/guide-to-the-uk-general-data-protection-regulation-uk-gdpr/)

<sup>4</sup> <https://www.ofgem.gov.uk/environmental-and-social-schemes/great-british-insulation-scheme>,  
<https://www.ofgem.gov.uk/publications/eco-privacy-notice>

Completing the pre-installation project/retrofit survey form.

Form Information	
Section A	Collects details of the premises where the project is being carried out, such as address, floor area segment and starting SAP band, and the measures that will be included in the project.
Section B	Collects information on wall insulation measures. Only required for projects which include wall insulation.
Section C	Collects information on heating controls and electric storage heaters. This section must be completed for any project which includes the installation of a heating measure.
Section D	Collects information on sketch plan of the premises. Its mandatory for all projects and can be completed by retrofit designer/assessor or retrofit coordinator.
Section E	Declaration for completion by the Retrofit Coordinator or if a project consists solely of a connection to a district heating system (DHC) or a DHC and data light measures (DLMs) only, the DHC installer

## A. Customer, Retrofit Coordinator and Premises Details

For PAS and GB insulation scheme measures, fields 1-2 and 6-10 are optional. Field 3 is optional for social housing.

For Non-PAS measures, all fields are required.

Field	Response					
1. Date of pre project RdSAP / SAP survey:						
2. Retrofit Coordinator:	Name:  Company name:  Tel:  Email:					
3. Name of occupier:						
4. Address of installation and postcode:						
5. Property type <sup>5</sup> :	<div>House</div> <div>Flat/Maisonette</div> <div>Park home</div>					
6. Tenure type:	<div>Owner occupier</div> <div>Private tenant</div> <div>Social housing</div>					
7. Floor area segment <sup>6</sup> (m <sup>2</sup> )	<table border="1"> <tr> <td>0-72 m<sup>2</sup></td><td>73-97m<sup>2</sup></td><td rowspan="2">Total floor area (m<sup>2</sup>):</td></tr> <tr> <td>98-199 m<sup>2</sup></td><td>200+m<sup>2</sup></td></tr> </table>	0-72 m <sup>2</sup>	73-97m <sup>2</sup>	Total floor area (m <sup>2</sup> ):	98-199 m <sup>2</sup>	200+m <sup>2</sup>
0-72 m <sup>2</sup>	73-97m <sup>2</sup>	Total floor area (m <sup>2</sup> ):				
98-199 m <sup>2</sup>	200+m <sup>2</sup>					

<sup>5</sup> This information is required when measures in the project may be used to support In-fill measures in nearby homes. For the purposes of ECO4 In-fill, 'house' includes bungalows, and 'flat' includes maisonettes.

<sup>6</sup> Floor area segment must be based on the internal total floor area output by the RdSAP/SAP assessment. Whilst RdSAP permits external dimension to be input, these will be converted to internal dimensions by the software.

Field	Response			
8. Starting SAP Band <sup>7</sup>	High B	High C	High D	High E
	High F	High G	Low B	Low C
	Low D	Low E	Low F	Low G
9. Starting SAP rating:				
10. Pre assessment Methodology:	RdSAP	Where relevant, pre retrofit EPC reference number: <sup>8</sup>		
	SAP			
11. Is the property in a rural area? <sup>9</sup>	Yes (Enter area code) N/A		Output Area Code:	
12. Has the sketch plan/floor plan of the premises been provided alongside pictorial evidence?				Yes (See section D)
13. Has smart meter advice been issued?				Yes    No

<sup>7</sup> [Standard Assessment Procedure - GOV.UK \(www.gov.uk\)](https://www.gov.uk/guidance/standard-assessment-procedure)

<sup>8</sup> An EPC is required for projects that only include DHC and DLM measures and for in-fill DHC measures, except where the DHC measure is the installation of a shared ground loop GSHP. For projects within the score of PAS the assessment will be lodged with Trustmark and no reference number is needed. Mix of a pre-EPC and post EPR would not be accepted. The pre-retrofit and post-retrofit assessment must use the same methodology. Where the pre-retrofit is a full SAP lodged as an EPC, the post-retrofit must be the same. This is stated in the [supplier data dictionary](#), in the description for the field 'Post\_Assessment\_Methodology'.

<sup>9</sup> [Rural/urban classifications - Office for National Statistics](#) - Applies to England, Wales and Scotland. Premises in rural area in England aren't eligible for the rural off gas uplift.

What measure/s will be carried out following the pre installation RdSAP /SAP project survey? (Please tick below the relevant boxes)			
Insulation Measures		Heating Measures	
Wall <b>Measures:</b>	Cavity Wall Insulation External Wall Insulation Internal Wall Insulation Hybrid Wall Insulation	Boiler Measures: (ECO4 only)	<input type="checkbox"/> Repair <input type="checkbox"/> Broken Replacement Upgrade First time central heating
Floor <b>Measures:</b>	<input type="checkbox"/> Underfloor insulation <input type="checkbox"/> Solid floor insulation	Electric storage heaters Measures: (ECO4 only)	<input type="checkbox"/> Repair <input type="checkbox"/> Broken Replacement Upgrade
Roof <b>Measures:</b>	Loft insulation <input type="checkbox"/> Pitched roof insulation Flat roof insulation Room in Roof insulation	Heating controls measures:	Programmer & room thermostat Smart thermostat TRVs Time & Temperature Zone control Weather/load Compensation
Park Home <b>insulation:</b>	<input type="checkbox"/> Floor <input type="checkbox"/> Wall <input type="checkbox"/> Roof	<b>Other</b> measures:	Solar PV <input type="checkbox"/> District Heating Connection or repair <input type="checkbox"/> Standard Alternative Methodology (AM) <input type="checkbox"/> Data Light Measure
Other insulation measures:	<input type="checkbox"/> Draught proofing <input type="checkbox"/> Window glazing <input type="checkbox"/> Single to double <input type="checkbox"/> Improved double <input type="checkbox"/> Higher performance external doors		

## B. Information on Wall Insulation Measures

This section is required for measures or projects which include wall insulation.

All wall insulation measures	
1. Approximate construction year or age band, plus reasoning	
2. Predominate wall construction type eg solid brick, timber frame or system build <sup>10</sup>	
3. Percentage of total wall area this wall type:	%
Cavity wall insulation measures	
4. Are you claiming on ECO for extracted failed cavity wall?	<input type="checkbox"/> Yes <sup>11</sup> <input type="checkbox"/> No <input type="checkbox"/> N/A
5. Are the walls already partially insulated? <sup>12</sup>	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A

<sup>10</sup> Although most system build properties meet the definition of solid wall, some have external walls of a standard cavity construction and require a cavity wall insulation measure. The construction type of the external walls of a system build property should therefore be assessed prior to insulating the property

<sup>11</sup> A report from a chartered surveyor will be required to validate the failed cavity wall material and evidence provided that no existing guarantee is in place

<sup>12</sup> If the U value of the wall already meets relevant standards, any additional insulation will not be an eligible CWI measure.

## C. Information for Heating Measures

This section is required for projects or retrofits which include the installation of a heating measure. Question 3 is for ECO4 only.

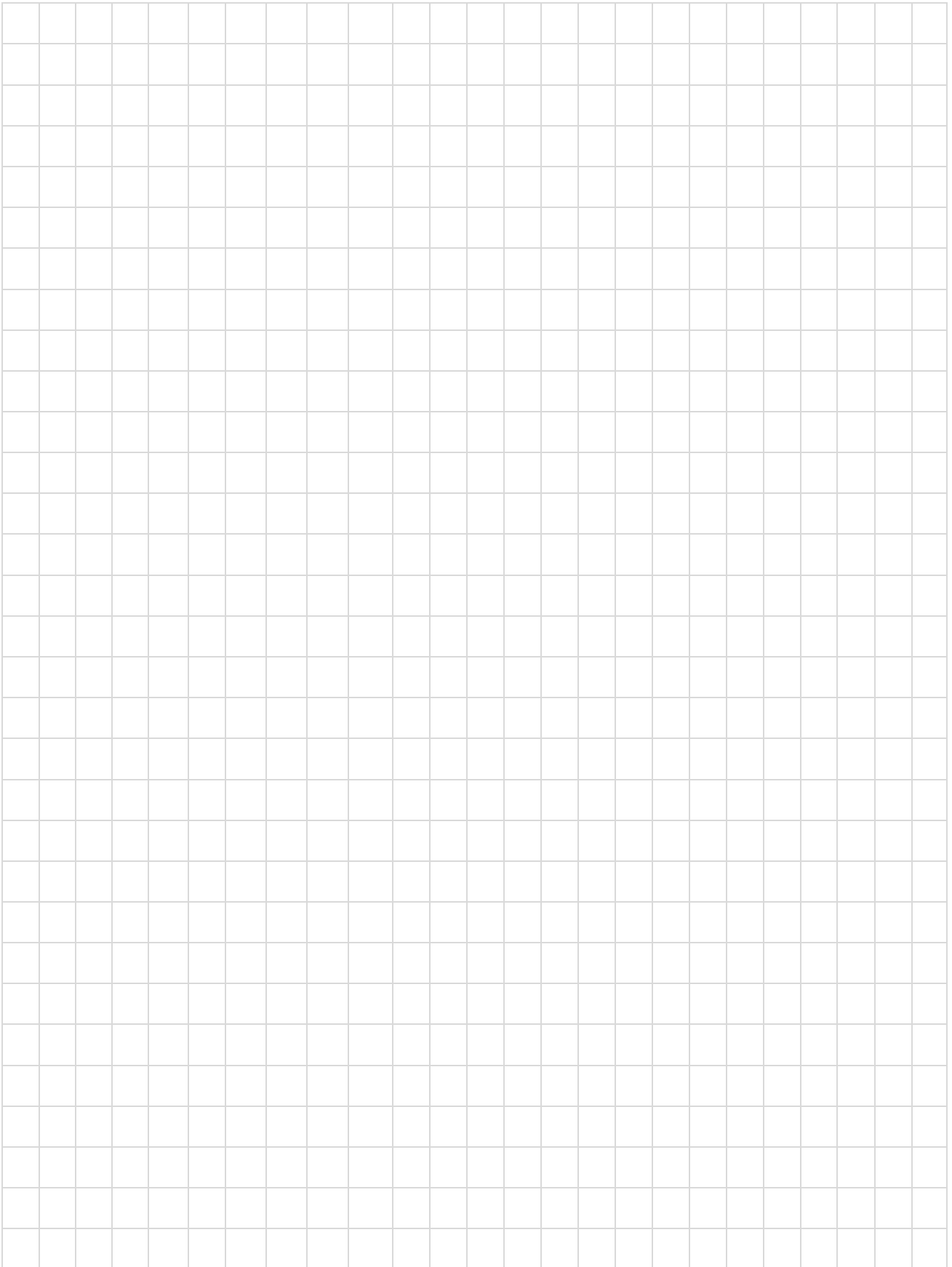
1. Is there a full set of functioning pre-existing heating controls?		<input type="checkbox"/> Yes <input type="checkbox"/> No	
2. What working heating controls currently exist?		<input type="checkbox"/> Room Thermostat <input type="checkbox"/> Boiler Programmer <input type="checkbox"/> Smart Thermostat <input type="checkbox"/> TRV (if TRV please go to 2a)	
2a) TRV	<p>➤ The existing number of radiators: _____</p> <p>➤ The existing number of radiators with TRVs: _____</p> <p>➤ The existing number of heated towel rails: _____</p> <p>➤ The existing number of heated towel rails with TRVs: _____</p> <p>Does the system incorporate a bypass radiator? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>		
3. Pre-existing ESH (ECO4 only)	<input type="checkbox"/> Yes  <input type="checkbox"/> No	Type:  1 _____ 2 _____ 3 _____ 4 _____ 5 _____	Responsiveness:  1 _____ 2 _____ 3 _____ 4 _____ 5 _____

## D. Sketch Plan and Instructions for all measure types

Basic sketch plan instructions for all measure types	
<p>Room Key<sup>13</sup>: BR# = Bedrooms; LR = Living Room; K = Kitchen; D = Dining Room; BTH = Bathroom.</p> <p>Wall Type key: Cavity/non cavity; Adjacent to unheated space/corridor.</p> <p>Doors should only be included where the measure being scored is a high-performance external door, and windows should only be included where the measure is window glazing.</p>	
Sketch plan instruction by measure type	
Heating Measures	Roof, wall and floor measures
<p>HS# = heating system/boiler (HS1 = main heating source)</p> <p>RAD = Radiator with no existing TRV</p> <p>RADT = Radiator with existing TRV</p> <p>RS = Room stat</p> <p>ST = Smart thermostat</p> <p>TW = Tower rail</p> <p>TWTRV = Towel rails with TRVs</p> <p>RH = Room heater</p> <p>ESH = Storage heater</p> <p>UFH = Under floor heating</p>	<p>The location of pre-main heat source(s) should be clearly recorded on the sketch <b>using the key in the 'heating measures' column.</b></p> <p>PR = Pitched roof</p> <p>FR = Flat roof</p> <p>RIR = Room in roof</p> <p>RES = RIRI Residual Loft Area</p> <p>UFI = Under floor insulation (specify solid or suspended)</p>

<sup>13</sup> For multi storey premises, please record floor position, ie basement, ground floor, room-in-roof adjacent to the relevant sketch.





## E. Retrofit Coordinator or DHC Installer Declaration

Question 1 is optional for PAS and GB insulation scheme retrofits only.

Details and declaration		
1. Retrofit Coordinator or DHC Installer <sup>14</sup> : name, company, and address:		Trustmark License Number (TMLN): <sup>15</sup>
2. I confirm that all the information on this form has been accurately presented:	<input type="checkbox"/> Yes <input type="checkbox"/> No (If no, enter what has not been declared and what's the reason for not declaring it)	
3. I confirm that the building was pre-existing before 1 April 2022	<input type="checkbox"/> Yes <input type="checkbox"/> No	
4. Retrofit Coordinator or DHC Installer Signature and date:		Date:

<sup>14</sup> A DHC installer may sign this declaration only in the case of projects consisting solely of a connection to a district heating system (DHC) or a DHC and data light measures (DLMs) only.

<sup>15</sup>Not mandatory for DHC/ DLM measures.

**PICI**

## ECO4 & Great British Insulation Scheme Post-Installation Declaration

### Introduction

The purpose of this form is to capture the details of the completed project and the measure/s within it. The form may be completed offsite when work has completed, and a copy must be retained with the occupier.

Any fraudulent activity including falsifying statements, falsifying signatures, and copying- pasting may be reported to the Police/Action Fraud or a similar organisation. This may affect the validity of any measure installed and the measure may be rejected.

Any evidence of electronically duplicated or forged signatures will be investigated. Any measures where suspected fraudulent activity or scheme abuse is detected will be rejected<sup>1</sup>.

Ofgem also recommends that any additional evidence collected as part of these forms be handled as the final step in the process to adhere to Data Protection Act 2018 requirements<sup>2</sup>.

For better understanding on how your data will be used under The Great British Insulation Scheme or ECO4 please visit our website<sup>3</sup>.

Please be aware some sections are scheme specific – and have been labelled as so. If a section or question is not relevant to your scheme, please leave section blank. Otherwise, please fill out all questions.

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<sup>1</sup> [Please see chapter 8 in the ECO4 Delivery Guidance for further information.](#)

<sup>2</sup> <https://ico.org.uk/for-organisations/uk-gdpr-guidance-and-resources>

<sup>3</sup> <https://www.ofgem.gov.uk/environmental-and-social-schemes/great-british-insulation-scheme>,  
<https://www.ofgem.gov.uk/publications/eco-privacy-notice>

## Completing the post installation declaration form

Form Information	
Section A	This section is designed to capture the details of the occupier or landlord. It must be signed by the occupier or landlord, unless the property is social housing.
Section B	This section is designed to capture the details of the completed project. It must be completed by the Retrofit Coordinator or by the relevant operatives, where the project consists only of DHC and/or DLMs.
Section C	This section is designed to capture the details of the measures carried out. This must be completed by the Retrofit Coordinator. once the project/measure is completed.
Section D	This section is designed to capture the details of district heating connection (DHC) measures that have been carried out as part of a project. It must be completed by the installer once the project/ measure is completed.
Section E	This section contains declarations of compliance with PAS, MCS and building/other regulations. It must be completed by all operatives carrying out measures within the project.
Section F	This section is developed to be signed from the Retrofit Coordinator or relevant operatives upon the completion of the ECO4 project. The section is designed to capture multiple operatives.
Section G	This section is designed to capture the POPT calculation for partial project scores. To be completed by the qualified operative who completed the installation in accordance with PAS, or other relevant standard where PAS is not applicable. May be completed offsite when work has been subcontracted.

## Occupier/Landlord Details and Declaration

Occupier or Landlord confirms all information is true by signing section A

- The installation date recorded next to the measure(s) described on the following page or on the attached spreadsheet is/are correct.
- The retrofit coordinator has demonstrated and explained the use and maintenance of (or relating to) any measure and has provided operating instructions and system documentation for the installed measure(s) described on the following page. The Installer has also made me aware of the need to continue to maintain the fabric (walls, floors, and roof).
- I confirm that the premises was occupied before the date of completed installation<sup>4</sup>.
- For Internal Wall Insulation measures, where any rooms have been left uninsulated, I confirm that the installer has made me aware of the importance of continuous ventilation, and heating those rooms to at least 18°C.

Occupier/Landlord Details:	<input type="checkbox"/> Private Tenant <input type="checkbox"/> Owner occupier <input type="checkbox"/> Landlord <sup>5</sup> / Managing Agent <sup>6</sup>
Occupier/Landlord print name <sup>7</sup> and full address including postcode <sup>8</sup> :	<p>Full name:</p> <p>Address:</p>
Contact phone No and email address:	<p>Contact number: _____</p> <p>Email address<sup>9</sup>: _____</p>

<sup>4</sup> Applicable only for those premises built from 1st April 2022 and to be signed by the landlord or non-resident owner, excluding the repair of broken heating measures.

<sup>5</sup> Including social housing providers

<sup>6</sup> Landlord's authorised property management agent.

<sup>7</sup> Occupier is the applicant/individual receiving the ECO4 measure. If you are signing on behalf of the occupier, the occupier name should still be printed here.

<sup>8</sup> Address of property where retrofit has occurred.

<sup>9</sup> If email address is not available enter N/A

Signature or signing on behalf of occupier <sup>10</sup> :	Print name:	Occupier relationship:
	Signature:	Date:

## B. Retrofit Details (To be completed by Retrofit Coordinator)<sup>11</sup>

	1. Are all measures lodged with Trustmark?	<input type="checkbox"/> Yes (Enter Project Number below) Project Number: _____ <input type="checkbox"/> No <input type="checkbox"/> N/A <sup>12</sup> : _____ (Tick only when no measures to be installed are covered by PAS2035)	
	2. Type of Measure(s)	Regular ECO4	Data Light Standard AM <sup>13</sup> Great British Insulation Scheme
ECO4 Only	3. Building Fabric Repair Cost		
ECO4 only	4. Installation Standards <sup>14</sup>	MCS	PAS 2030: 19 <input type="checkbox"/> Non-PAS
	5. Have any other measures been carried out outside scheme eligible measures? <sup>15</sup>	<input type="checkbox"/> Yes  <input type="checkbox"/> No	Measure 1:   Measure 2:

<sup>10</sup> If you are signing on behalf of the occupier, you must not be the installer, energy supplier or any other party in the supply chain responsible for this measure. By signing this, you do not sacrifice any rights to remedy.

<sup>11</sup> Or by the relevant operatives, where the project consists only of DHC and/or DLMs

<sup>12</sup> Not all measures eligible for ECO4 are required to be lodged with Trustmark eg. DHC.

<sup>13</sup> Standard Alternative Methodology measure

<sup>14</sup> In cases where multiple installation standards followed relevant boxes.

<sup>15</sup> If a measure is installed outside of either scheme's eligible measures, then a full project score cannot be awarded.

	6. Have innovation measures been installed?	<p>Yes (If yes, confirm evidence held to demonstrate correct product/ system followed)</p> <p>No</p>	<p>Evidence: <sup>16</sup></p> <p><input type="checkbox"/> A valid guarantee certificate which states the product/ system installed</p> <p><input type="checkbox"/> Mid and post install photographic evidence</p> <p><input type="checkbox"/> Other, please specify:</p>
ECO4 only	7.Has hydraulic balancing been carried out? <sup>17</sup>	<p><input type="checkbox"/> Yes    <input type="checkbox"/> No    <input type="checkbox"/> N/A</p>	
ECO4 Only	8.What is the post fuel type? <sup>18</sup>		

<sup>16</sup> For innovation measures, suppliers must hold evidence that the approved product was installed and/ or process followed. Evidence required for each innovation measure is listed on the ECO4 approved innovation measure list. Where more than one innovation measure, list evidence held for each separately.

<sup>17</sup> [ECO4: 2022 -2026: government response \(publishing.service.gov.uk\)](https://www.publishing.service.gov.uk/government/uploads/system/uploads/attachment_data/file/101441/ECO4_2022-2026_government_response.pdf)

<sup>18</sup> Enter fuel type also for district heating connections.



## C. Measure(s) Details

Insulation Measures <sup>19</sup>		Product Details <sup>20</sup>	Is POPT ≥ 67%? (Y/N)	Date Measure Installed (DD/MM/YYYY)	Date of Handover (DD/MM/YYYY)
	Cavity Wall Insulation (B1)  <input type="checkbox"/> 0.027 <input type="checkbox"/> 0.033 <input type="checkbox"/> 0.04				
	Cavity Wall Insulation of a Cavity with Partial Fill Insulation (B1)				
	Party Cavity Wall Insulation (B1)				
	External Wall Insulation (B4)  <input type="checkbox"/> Cavity <input type="checkbox"/> Solid Thickness Installed: ____mm				
	Internal Wall Insulation (B8)  <input type="checkbox"/> Cavity <input type="checkbox"/> Solid Thickness Installed: ____mm				
	External Hybrid Wall Insulation (B7)  <input type="checkbox"/> Cavity <input type="checkbox"/> Solid Thickness Installed: ____mm				

<sup>19</sup> Thickness installed is the thickness of the insulation material alone and does not include any boarding, rendering etc.

<sup>20</sup> Enter the following details: manufacture, product name, serial number (Eg. Insulation Inc ECO Therm,12/3456)

<sup>21</sup> If answer is no then actual POPT should be entered.

Insulation Measures <sup>19</sup>	Product Details <sup>20</sup>	Is POPT ≥ 67%? (Y/N) <sup>21</sup>	Date Measure Installed (DD/MM/YYYY)	Date of Handover (DD/MM/YYYY)
Internal Hybrid Wall Insulation (B7) <input type="checkbox"/> Cavity <input type="checkbox"/> Solid Thickness Installed: _____mm				
Loft Insulation (B9) <input type="checkbox"/> ≤ 100 <input type="checkbox"/> > 100 Start Depth(mm): _____ Finish Depth(mm): _____				
Roof Insulation <input type="checkbox"/> Pitched (B10) <input type="checkbox"/> Flat (B5)				
Room in Roof Insulation (B12) <input type="checkbox"/> Yes-Residual loft insulated by installer <input type="checkbox"/> No-Residual loft not insulated by installer <input type="checkbox"/> N/A-No residual loft area present				
Underfloor Insulation (B6) <input type="checkbox"/> Solid <input type="checkbox"/> Suspended				

Insulation Measures <sup>19</sup>		Product Details <sup>20</sup>	Is POPT ≥ 67%? (Y/N) <sup>21</sup>	Date Measure Installed (DD/MM/YYYY)	Date of Handover (DD/MM/YYYY)
	Park Home Insulation (B13) <input type="checkbox"/> Floor <input type="checkbox"/> Wall <input type="checkbox"/> Roof				
	Other Insulation <input type="checkbox"/> Draught Proofing (B2)				
ECO4 only	Window glazing (B3) <input type="checkbox"/> Single to double <input type="checkbox"/> Improved double				
ECO4 Only	Higher performance external doors (B3)				

Heating Measures	Product Details <sup>22</sup>	Is POPT ≥ 67%? (Y/N)	Date Measure Installed (DD/MM/ YYYY)	Date of Handover (DD/MM/YYYY)
ECO4 only	Boiler Measures PAS annex's <input type="checkbox"/> Broken _____ <input type="checkbox"/> Repair _____ <input type="checkbox"/> Upgrade _____			
ECO4 only	First Time Central Heating  PAS annex _____			
	Heating Controls (C5) <input type="checkbox"/> Programmer and room thermostat <input type="checkbox"/> TRVs <input type="checkbox"/> Smart Thermostats <input type="checkbox"/> Weather Compensation <input type="checkbox"/> Load Compensation <input type="checkbox"/> TTZC			
	Please record the number of heating controls present post install:  Programmers and RT: _____ Room Thermostat: _____  Smart Thermostat: _____ TTZC (number of zones): _____  TRVs: _____ Number of radiators: _____  Weather Compensation: _____ Load Compensation: _____			

<sup>22</sup> Enter brand, model and serial number for all new heating measures installed at the product details. (Including Boiler, ESH, DHC and renewable installed as FTCH)

Solar PV measures only						
	Product Detail	KWp	OI Factor	Inclination	Orientation	Individual Array POPT
ECO 4 only						
				Date installed (DD/MM/YYYY)	Handover Date (DD/MM/YYYY)	Total Measure POPT
Other measures (Including data light and alternative methodology)						
	Type of measure <sup>24</sup> :	Product detail	Is POPT ≥ 67%? (Y/N) <sup>25</sup>	Date installed (DD/MM/YYYY)	Date of handover (DD/MM/YYYY)	
Heating Measures		Product Details <sup>22</sup>		Is POPT ≥ 67%? (Y/N)	Date measure Installed (DD/MM/YYYY)	Date of Handover (DD/MM/YYYY)
ECO4 only	Electric Storage Heater (D1) <sup>23</sup> <input type="checkbox"/> Broken <input type="checkbox"/> Repair <input type="checkbox"/> Upgrade					
ECO4 only	District Heating Connection <input type="checkbox"/> New <input type="checkbox"/> Repair					

This section is for ECO4 only.

<sup>29</sup> We will use a Data Sharing Agreement with Heat Trust to check DHCs are registered with the Heat Trust Scheme.

4. Information for in-fill DHC measures		
If the project is a house in-fill, has a relevant person confirmed in writing that, <b>to the best of that person's knowledge and belief, no changes were made to</b> the premises after the pre-installation EPC was issued and before the measure was completed which would increase the energy performance rating of the premises to band A, B or C?		<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A
DHC measure installer signature and date:		Date:

## E. Compliance Declaration

1. For measures in compliance with PAS, complete the declaration below		
The installation of the energy efficiency measures listed below at the address provided in section A and handed over on the date listed in section C has been undertaken on the basis of a retrofit design claimed to comply with PAS 2035, using a process complying with PAS 2030, including Annexes indicated in section C.		
Measures	Retrofit Installer	Certification Body: <sup>30</sup>
1: _____	_____	_____
2: _____	_____	_____
3: _____	_____	_____
4: _____	_____	_____
5: _____	_____	_____
6: _____	_____	_____
7: _____	_____	_____
8: _____	_____	_____
9: _____	_____	_____

<sup>30</sup> Required only where PAS compliance is confirmed by independent third-party certification or other party certification. For Certification body enter the installing company's certification body and for Retrofit installer enter the name of the installer/operative who carried out the installation.

3. For measures not installed to PAS or MCS, complete the declaration below  
This section is for ECO4 only

I confirm the installation process used to carry out the energy efficiency measure listed below, at the address provided in section A, and handed over on the date listed in section C, complies with building regulation and any other regulation that relates to the installation of the measure.

Measures	Installer/Operative:
1: _____	_____
2: _____	_____
3: _____	_____

2. For measures in compliance with MCS, complete the declaration below  
This section is for ECO4 only

The installation of the energy efficiency measure(s) listed below, at the address provided in section A, and handed over on the date listed in section C, has been undertaken using an installation process complying with [\*tick as appropriate\*] ☐ MIS 3002: 2020 (Solar PV) ☐ MIS 3004: 2015 (Biomass) ☐ MIS 3005: 2017 (Heat Pump) ☐ MIS 3007: 2018 (MicroCHP)

Measures	Retrofit Installer <sup>31</sup>
1: _____	_____
2: _____	_____

<sup>31</sup> Record both individual names and company names



## F. Retrofit Coordinator/Installer(s) Declaration

Please confirm the following statements are true by signing below:<sup>32</sup>

- I confirm that the installation details recorded for the measure(s) described on the previous pages or on the attached spreadsheet are true and correct. Any fraudulent activity including falsifying statements, falsifying signatures, and copying - pasting may be reported to the Police/Action Fraud or a similar organisation. This may affect the validity of any measure installed and the measure may be rejected.
  - The handover included copies of all relevant warranties and manuals, and verbal instructions were given on how to use and maintain the measure.
  - For loft **insulation measures with  $\leq 100\text{mm}$  pre-existing insulation** only:  
I confirm that a loft declaration is secured in the loft, near the hatch.
  - For premises unoccupied after 1 April 2022 only:  
I confirm that to the best of my knowledge, the property was built before 1 April 2022.
  - I confirm that I have followed (tick appropriate) ECO4 / Great British Insulation Scheme relevant requirements to carry out the installation(s) of measures following the pre RdSAP/SAP assessment<sup>33</sup>.
- Questions F1, F2 and F3 are mandatory for all measures regardless of falling into PAS compliance or non-PAS compliance.
- For measures inside the scope of PAS 2030, completing questions F4-F8 is optional. For measures outside of PAS 2030, completing questions F4-F8 is mandatory.
- For measures within the scope of PAS 2030, questions F9 to F13 are mandatory if work is subcontracted.

### Retrofit Coordinator / Operative Declaration<sup>34</sup>

1.Name of Retrofit Coordinator or DHC		Certificate No(s):
2.Address details:		

<sup>32</sup> Each operative is responsible and accountable for the measure they installed. In signing this section, operatives confirm the below statements only in respect of the measures they have installed themselves.

<sup>33</sup> It must be completed by the Retrofit Coordinator only.

<sup>34</sup> For non-PAS measures enter the operative certificate number issued by the relevant accreditation body. For PAS measures enter the Trustmark Licence Number known as TMLN and is associated with the scheme.

3. Retrofit Coordinator or DHC Operative signature:		Date of project completed installation <sup>35</sup> :	
4. Name of Operative 1		Certificate No(s):	
i. Company		Signature	
ii. Address details:			
5. Name of Operative 2		Certificate No(s):	
i. Company		Signature	
ii. Address details:			
6. Name of Operative 3		Certificate No(s):	
i. Company		Signature	
ii. Address details:			
7. Name of Operative 4		Certificate No(s):	
i. Company		Signature	
ii. Address details:			
8. Name of Operative 5		Certificate No(s):	
i. Company		Signature	
ii. Address details:			

<sup>35</sup> To be filled by Retrofit Coordinator or DHC operative.

Subcontracted operative signature (only to be completed when work is subcontracted)			
9.Name of Operative 1		Certificate No(s):	
i. Company		Signature	
ii. Address details:			
10.Name of Operative 2		Certificate No(s):	
i. Company		Signature	
ii. Address details:			
11.Name of Operative 3		Certificate No(s):	
i. Company		Signature	
ii. Address details:			
12.Name of Operative 4		Certificate No(s):	
i. Company		Signature	
ii. Address details:			
13.Name of Operative 5		Certificate No(s):	
i. Company		Signature	
ii. Address details:			

## G. POPT Calculation for ECO4 or Great British Insulation Scheme Scores

Relevant tables are required to be completed according to insulation measure(s) installed.

Roof insulation measures only										
Enter areas with a different roof type (or where a different roof insulation measure/depth is being installed) as extensions. For RIRI, the total residual loft area should be included in the RIR area recorded below. For further information on RIRI measure please see RIRI section in ECO4 Delivery Guidance.										
Property section (main loft, extension etc)	Roof type Flat / Pitched / RIR	Roof area (M <sup>2</sup> )	m <sup>2</sup> and type of insulation to be installed <sup>36</sup>							
			≤ 100mm		>100m m		FRI		RIRI	
			≤ 100mm		>100m m		FRI		RIRI	
			≤ 100mm		>100m m		FRI		RIRI	
			≤ 100mm		>100m m		FRI		RIRI	
			≤ 100mm		>100m m		FRI		RIRI	
Total roof area <sup>37</sup>		A	≤ 100mm	B	>100m m	C	FRI	D	RIRI	E
≤ 100mm POPT	B/A= %		FRI POPT					D/A= %		
> 100mm POPT	C/A= %		Percentage of RIRI measure installed <sup>38</sup>					F %		
		RIRI POPT					(E x F)/A= %			

<sup>36</sup> For RIRI, 'E' refers to the floor area of the RIR + the residual area, not the amount of insulation installed.

<sup>37</sup> For RIRI measures, the total roof area is the footprint area and not all the elements of the RIRI measure.

<sup>38</sup> Previous versions of the POPT calculation referred to 'percentage of measure installed'. We no longer use this terminology, but the calculation gives the same result.

Under Floor insulation measures only				
Property section (main property, extension etc)	Floor construction e.g. suspended timber		Area M <sup>2</sup>	M <sup>2</sup> of insulation to be installed
Underfloor Insulation POPT	B/A= %	Total floor area	A	B

IWI / EWI / CWI measures only						
Enter each different type of wall area as an extension. Wall area must include all <u>heat loss wall areas</u> (including areas already insulated and areas that cannot be insulated).						
Property section (eg, main property, extension, front walls etc)	Wall construction E.g. Cavity / cob / solid stone / solid brick / system / timber / park home	Wall area m <sup>2</sup> (excl windows and doors)	M <sup>2</sup> of insulation to be installed			
			CWI		IWI/EWI	
			CWI		IWI/EWI	
			CWI		IWI/EWI	
			CWI		IWI/EWI	
			CWI		IWI/EWI	
Total wall area		A	CWI	B	IWI/EWI	C
		Total wall area		IWI/EWI (type 2)		D
CWI POPT	B/A= %		IWI /EWI POPT (type 2)	D/A= %		
IWI /EWI POPT	C/A= %					

Solid Floor insulation measures only				
Property section (main property, extension etc)	Floor construction e.g. solid concrete		Area (m <sup>2</sup> )	m <sup>2</sup> of insulation to be installed
Solid Floor Insulation POPT	B/A= %	Total floor area	A	B

**PIHC**

## Energy Company Obligation (ECO4) Pre-Installation Heating Checklist

### Introduction

The purpose of this form is to provide assurance that heating measures installed meet ECO4 requirements. It assesses **a home's pre-main** heat source and status with regard to insulation pre-conditions. It provides partial guidance on the heating measures that may be eligible in different circumstances but must be read in conjunction with the ECO4 Delivery Guidance.

Suppliers should ensure operatives complete this checklist and retain the completed checklist on their systems for all heating measures in ECO4. This checklist should also be used when assessing a non-boiler central heating system and/or installing a new one (such as air to air heat pumps). This checklist also covers projects where a district heating connection (DHC) is to be installed or repaired. Suppliers must be able to provide a copy of a completed checklist to us on request.

This checklist does not provide any detailed information on the requirements of ECO. Further information can be found in our guidance document, Energy Company Obligation (ECO4) Guidance: Delivery, available on our website<sup>1</sup>

### Accuracy of the checklist

It is important to note that your decision to repair or replace a heat source on the basis that you consider it to be inefficient or broken down and unable to be economically repaired, does not necessarily mean that we will the same conclusion, particularly if we consider that an assessment has been incorrectly carried out. For this reason, suppliers should ensure that the checklist is completed accurately by the relevant operative(s).

When filling in the Pre-Installation Heating Checklist assessment details should not be copied from other Pre-Installation Heating Checklist, i.e. photocopying or copying and pasting should not be used to complete any part of this form.

If the information on this checklist is found to be false, Ofgem will investigate the case and may reject the associated measures.

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<sup>1</sup> [Energy Company Obligation \(ECO4\) Guidance: Delivery | Ofgem](#)



### Operative competency

Measures referenced in PAS 2030:2019 or MCS must be installed by, or under the responsibility of, a person who is registered with TrustMark for the purposes of that measure. These requirements are evidenced to Ofgem by a Certificate of Lodgement (CoL) awarded by TrustMark for measures.

Data Light Measures (DLMs) and Innovation Measures (IMs) which are not referenced in PAS 2030:2019 and do not fall under MCS, must be certified by a person accredited to ISO / IEC 17065:2012.

For DHC measures, except for DHCs which are the installation in the home of a GSHP connected to a shared ground loop, suitable qualifications for installers may be a Level 2 or 3 NVQ in gas, plumbing or mechanical engineering. We recommend CIBSE Heat Networks: Code of practice for the UK is followed during all phases of the DHC project where relevant. DHCs which are the installation of a shared ground loop GSHP should be installed by, or under the responsibility of, a person who is registered with TrustMark for the purposes of that measure.

For boilers not referred to in PAS, and for all boiler repairs, the assessment and repair/replacement must be carried out by operatives who meet industry competency standards for that particular fuel type.

A pre-assessment may be carried out by an assessor who may also fill out sections of the checklist. However, this assessment must be checked, and its accuracy confirmed by the operative prior to carrying out the heating measure.

### Format of the checklist

Suppliers may adapt the format of the checklist to match their own systems, as long as the content is not changed. Suppliers should submit adapted checklists to us before use for confirmation that the content is acceptable.

Any evidence of electronically duplicated or forged signatures will be investigated. Any measures where suspected fraudulent activity is detected will be rejected.

Ofgem also recommends that any additional evidence collected as part of these forms be handled as the final step in the process to adhere to Data Protection Act 2018 requirements.

## Completing the checklist

Guidance	
Section A	Operative and assessment details. This section captures the details of the operative carrying out the pre-heating assessment, core details of the premises, and the details of the assessor carrying out the pre-assessment of the heating source (if different to the operative). It may be completed by the operative or assessor. All questions are mandatory and must be filled for all heating measures. Questions A8,A9 and A11 must be completed by the operative who carried out the post heating system installation.
Section B	Central heating systems (incl district heating connections). The section must be completed if the home contains a pre-existing central heating system. The section may be completed by the operative or assessor who has inspected the heating system on-site.
Section C	Electric storage heaters. This section must be completed if the home contains pre-existing electric storage heaters. The section may be completed by the operative or assessor who has inspected the heating system on-site.
Section D	Room heaters or no fixed heating. This section must be completed if the home contains pre-existing room heaters or has no fixed heating. The section may be completed by the operative or assessor who has inspected the heating system on-site.
Section E	Air source and ground source heat pump. This section must be completed if the home contains pre-existing heat pump. The section may be completed by the operative or assessor who has inspected the heating system on-site.
Section F	District heating connections and repairs. This section is to be completed by the operative who has inspected the heating system on-site.
Section G	Insulation pre-conditions and off-gas hierarchy. This section collects information to show how insulation pre-conditions are met and, for off-gas premises, how the heating hierarchy has been applied. The section is mandatory and must be completed for all heating sources assessed. The section contains a declaration which must be signed by the Retrofit Coordinator. <sup>2</sup>
Section H	Repair/replacement tables. May be completed by a person who has not inspected the heating source, but the operative who has completed the assessment must sign this form to confirm that Section G has been completed accurately. If agreed with the supplier, the quote may be provided in a different format. Please attached all relevant documentation to this form. This section may be completed by a different operative at survey or post-installation stage.
Section I	Repair cost threshold table and average repair table. This section is designed to identify when a boiler, electric storage heater or air source heat pump cannot be economically repaired. The tables show information such as maximum repair cost for boilers and electric storage heaters.

<sup>2</sup> If non-PAS measure the relevant DHC operative must complete this section.

## A. Operative And Assessment Details

A.	Operative and assessment details	
1	Full Property Address: (Building number/name, Street name, Town, City, County and postcode)	
2	Company name of operative carrying out installation	
3	Operative name (as on the accreditation record)	
4	Operative's accreditation	<div>ECS card      Gas safe      MCS Certified</div> <div><input type="checkbox"/> Other _____</div> <div>Accreditation number: _____</div>
6	Did premises have a gas meter on 1 April 2022?	<div>Yes: premises is on-gas</div> <div>No: heating measures are subject to the off-gas hierarchy (complete G2)</div>
7	Is the assessment of repair/replacement completed by the same operative?	<div>Yes      <input type="checkbox"/> No (Go to 7a and enter details)</div>
a	Name, accreditation and signature (Complete this section only if assessment and the subsequent heating measure installation or repair isn't carried out by the same operative)	<div>Assessor/Operative Full name:</div> <div>Assessor/Operative Accreditation and number:</div> <div>Assessor/Operative signature:</div>

A.	Operative and assessment details	
8	I confirm that the information contained in sections A, B, C, D, E, F and H of this form is true and accurate. I acknowledge and understand that it is a criminal offence to knowingly make a false declaration and that the offence is punishable by a fine, imprisonment or both.	Yes
9	For First Time Central Heating I confirm that there is no evidence that at any point prior to the installation of the boiler the premises had a central heating system, district heating system, or renewable system nor, immediately prior to the installation, did the premises have a working, efficient electric storage heater(s).	Yes
10	Date of assessment:	__ / __ / ____
11	Operative signature:	

## B. Central Heating Systems<sup>3</sup>

B Initial Details of assessment	
A boiler must meet certain criteria to determine whether it is broken down and can be replaced, repaired, or upgraded. The first step is to assess whether a boiler is 'non-condensing' or 'broken down'. Please complete below.	
1	Brand and model
2	Model qualifier
3	Fuel type
4	Is the boiler non-condensing, or does it have an efficiency no better than a non-condensing boiler?
4a	List the steps to reach the conclusion the boiler is non-condensing or has an efficiency no better than a non-condensing boiler.
4b	SAP winter seasonal efficiency (%)?
5	Is the boiler broken down? <sup>4</sup>
6	Age of boiler / Year of original commissioning (if available) <sup>5</sup>

<sup>3</sup> For renewable heating system repairs and replacements, operatives can use the below form to help determine whether or not the system is economically repairable. The funder must be satisfied that enough evidence has been presented to support the determination being made

<sup>4</sup> A boiler is considered broken down if, when connected to electrical and fuel supplies, it does not respond appropriately to any demand for heat as required by the central heating system or domestic boiler system.

<sup>5</sup> When assessing the boiler age, the estimated age should be rounded down e.g. a boiler that is 4.7 years old should be assessed as a 4-year-old boiler. Its required only for boiler replacements and repairs.

B	Initial Details of assessment
7	<div>How did you establish the original age of boiler / year of commissioning? (Tick relevant boxes and provide pictorial evidence)<sup>6</sup></div> <div> <input type="checkbox"/> Boiler name plate  <input type="checkbox"/> Installation Certificate  <input type="checkbox"/> Warranty documentation  <input type="checkbox"/> PCDB final year of manufacture  <input type="checkbox"/> Other _____ </div>
8	Serial number of boiler
9	<div>Are all parts required for the repair available? (eg if parts are available at a reasonable cost and within a reasonable timeframe or if the repair does not require any parts tick 'Yes')</div> <div> <input type="checkbox"/> Yes  <input type="checkbox"/> No, please enter reasons      </div>
10	<div>Is the actual cost of repair more than the actual cost of a replacement boiler? Complete cost table in section H to determine.</div> <div> <input type="checkbox"/> Yes – boiler may be replaced.  <input type="checkbox"/> No  Cost of repair: (Exc. VAT) £ _____  Cost of replacement: (Exc. VAT) £ _____ </div>
11	<div>Is the actual cost of repair less than the maximum cost of repair as identified in the 'Economic Repair Cost Comparison Tables'?<sup>7</sup></div> <div> <input type="checkbox"/> Yes The boiler should be repaired. Please use Section H to provide details of repair undertaken.  <input type="checkbox"/> No The boiler should be replaced </div>
12	Is it a combination boiler? <input type="checkbox"/> Yes <input type="checkbox"/> No
13	Are there any other boilers in the property? (Please provide details including location, make, model & serial numbers etc)

<sup>6</sup> The boiler age can be determined by assessing the following information: the boiler name plate, the installation certificates and warranty documentation and PCDB Final year of manufacture. **Customers' declaration about boiler age** are not acceptable/valid. Its required only for boiler replacements and repairs.

<sup>7</sup> See Boiler repair cost comparison table in section I.

14. Broken boiler only:	
Once you have identified whether the boiler is 'broken down', you must identify all the possible faults that have caused the boiler to be broken down.	
<p>Boiler Fault List</p> <p>Select the appropriate fault(s) that resulted in the boiler being broken down or not functioning efficiently and complete all sections of this question. (Note: this list is not exhaustive. Record any other faults not included in this list under 'Other').</p>	
Corrosion or fouling of the boiler heat exchanger	<input type="checkbox"/>
No boiler ignition	<input type="checkbox"/>
Unstable firing	<input type="checkbox"/>
Any other mechanical or electrical fault	<input type="checkbox"/>
Results of the flue gas analyzer combustion outside boiler manufacturer tolerance	<input type="checkbox"/>
Boiler and system sludge (Sludge alone may not be sufficient grounds to be considered broken in the ECO4 scheme)	<input type="checkbox"/>
Poor flue condition	<input type="checkbox"/>
Primary flow rate unsatisfactory or outside boiler manufacturer tolerance	<input type="checkbox"/>
Primary flow temperature unsatisfactory or outside boiler manufacturer tolerance	<input type="checkbox"/>
For combination boilers only: Unsatisfactory hot water flow rate or temperature which are outside of the manufacturer's specification/tolerance	<input type="checkbox"/>
Boiler external corrosion	<input type="checkbox"/>
Boiler installation is Immediately Dangerous (ID) or At Risk (AR) (Gas Safe definition)	<input type="checkbox"/>
Other: (Provide a detailed description)	
<p>Please write how you identified the failure and any associated symptoms. This may include any tests or checks carried out on the boiler to identify the symptoms. (This information will be used during audit to determine whether the boiler was correctly assessed. Therefore, provide as much information as possible.)</p>	

## C. Electric Storage Heaters

C. Details of assessment (Use form as many times as necessary for the number of ESH in the property)						
1	Total number of ESH/s in the premises	1	2	3	4	Other _____
2	Enter the relevant number of ESH been assessed eg ESH _1_	ESH ____			ESH ____	
3	Brand and Model					
4	ESH serial number (or any other unique identification detail of the ESH)					
5	ESH Responsiveness					
<p>If any ESH has a responsiveness of 0.2 or less, that ESH is inefficient and can only be upgraded<sup>8</sup> or, if home meets FTCH criteria, replaced with FTCH. Remaining questions in section C can be skipped for an inefficient ESH.</p>						
6	Is the ESH broken down?	<input type="checkbox"/> Yes  <input type="checkbox"/> No – can only be upgraded by renewables or DHC. Remaining questions in section C can be skipped.			<input type="checkbox"/> Yes  <input type="checkbox"/> No - can only be upgraded by renewables or DHC. Remaining questions in section C can be skipped.	
<p>Once you have identified if the ESH is 'broken down', you must identify all the faults that have caused the ESH to be broken down.</p>						
7	ESH Fault List - tick if fault is applicable (Note: this list is not exhaustive, please detail any additional faults in 'Other')	ESH  ____	ESH  ____	Provide details of how you identified the faults (This information will be used during audit to determine whether the ESH has been correctly assessed. Therefore, please provide as much information as possible.)		

<sup>8</sup> Subject to off-gas hierarchy in relevant homes (chapter 5 of the ECO4 Delivery Guidance)



## C. Electric Storage Heaters

C.	Details of assessment (Use form as many times as necessary for the number of ESH in the property)			
1	Total number of ESH/s in the premises	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> Other _____		
2	Enter the relevant number of ESH been assessed eg ESH _1_	ESH ____	ESH ____	
3	Brand and Model			
4	ESH serial number (or any other unique identification detail of the ESH)			
5	ESH Responsiveness			
<p>If any ESH has a responsiveness of 0.2 or less, that ESH is inefficient and can only be upgraded<sup>8</sup> or, if home meets FTCH criteria, replaced with FTCH. Remaining questions in section C can be skipped for an inefficient ESH.</p>				
6	Is the ESH broken down?	<input type="checkbox"/> Yes  <input type="checkbox"/> No – can only be upgraded by renewables or DHC. Remaining questions in section C can be skipped.		<input type="checkbox"/> Yes  <input type="checkbox"/> No - can only be upgraded by renewables or DHC. Remaining questions in section C can be skipped.
<p>Once you have identified if the ESH is 'broken down', you must identify all the faults that have caused the ESH to be broken down.</p>				
7	ESH Fault List - tick if fault is applicable (Note: this list is not exhaustive, please detail any additional faults in 'Other')	ESH ____	ESH ____	Provide details of how you identified the faults (This information will be used during audit to determine whether the ESH has been correctly assessed. Therefore, please provide as much information as possible.)

<sup>8</sup> Subject to off-gas hierarchy in relevant homes (chapter 5 of the ECO4 Delivery Guidance)

## C. Electric Storage Heaters

C.	Details of assessment (Use form as many times as necessary for the number of ESH in the property)			
1	Total number of ESH/s in the premises	<input type="checkbox"/> 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> Other _____		
2	Enter the relevant number of ESH been assessed eg ESH _1_	ESH ____	ESH ____	
3	Brand and Model			
4	ESH serial number (or any other unique identification detail of the ESH)			
5	ESH Responsiveness			
<p>If any ESH has a responsiveness of 0.2 or less, that ESH is inefficient and can only be upgraded<sup>8</sup> or, if home meets FTCH criteria, replaced with FTCH. Remaining questions in section C can be skipped for an inefficient ESH.</p>				
6	Is the ESH broken down?	<input type="checkbox"/> Yes  <input type="checkbox"/> No – can only be upgraded by renewables or DHC. Remaining questions in section C can be skipped.		<input type="checkbox"/> Yes  <input type="checkbox"/> No - can only be upgraded by renewables or DHC. Remaining questions in section C can be skipped.
<p>Once you have identified if the ESH is 'broken down', you must identify all the faults that have caused the ESH to be broken down.</p>				
7	ESH Fault List - tick if fault is applicable (Note: this list is not exhaustive, please detail any additional faults in 'Other')	ESH ____	ESH ____	Provide details of how you identified the faults (This information will be used during audit to determine whether the ESH has been correctly assessed. Therefore, please provide as much information as possible.)

<sup>8</sup> Subject to off-gas hierarchy in relevant homes (chapter 5 of the ECO4 Delivery Guidance)

C. Details of assessment (Use form as many times as necessary for the number of ESH in the property)				
	Example: Tick if fault applicable	✓		Write a detailed explanation
	ESH Fault List - tick if fault is applicable (Note: this list is not exhaustive, please detail any additional faults in 'Other')			
	Damaged thermal fuse or input cut out			
	Failure of storage element(s)			
	Faulty charge control			
	Faulty output control			

C.		Details of assessment (Use form as many times as necessary for the number of ESH in the property)		
	Faulty electronic controller			
	Faulty or broken fan			
	Other (Please provide detailed description)			
Complete to determine whether the broken down ESH can be economically repaired				
		ESH ____	ESH ____	
8	Age of ESH in years?			
9	State how you have established the age of the ESH?			

C.	Details of assessment (Use form as many times as necessary for the number of ESH in the property)		
10	Does the ESH contain asbestos? (A broken down ESH with asbestos 'cannot be economically repaired')	<input type="checkbox"/> Yes (If yes ESH can't be economically repaired) <input type="checkbox"/> No	<input type="checkbox"/> Yes (If yes ESH can't be economically repaired) <input type="checkbox"/> No
11	Are all parts required for the repair available? (if parts are available at a reasonable cost and within a reasonable timeframe <sup>9</sup> or the repair does not require any parts tick Yes)	<input type="checkbox"/> Yes <input type="checkbox"/> No – ESH can be replaced. Enter details of unavailable parts: <hr/> <hr/>	<input type="checkbox"/> Yes <input type="checkbox"/> No – ESH can be replaced. Enter details of unavailable parts: <hr/> <hr/>
12	Is the actual cost of repair more than the actual cost of a replacement ESH? Fill in cost tables in section H.	Cost of repair: (Exc. VAT) £_____ Cost of replacement: (Exc. VAT) £_____ <input type="checkbox"/> Yes - ESH can be replaced by HHR ESH, a DHC, upgraded to renewables or, where the home meets the FTCH criteria, FTCH. <input type="checkbox"/> No	Cost of repair: (Exc. VAT) £_____ Cost of replacement: (Exc. VAT) £_____ <input type="checkbox"/> Yes - ESH can be replaced by HHR ESH, a DHC, upgraded to renewables or, where the home meets the FTCH criteria, FTCH. <input type="checkbox"/> No
13	Is the actual cost of repair less than the maximum cost of repair as identified in the 'Economic Repair Cost Comparison Table'? <sup>10</sup>	Maximum cost of repair as identified in the 'Economic Repair Cost Comparison Table': (Exc. VAT) £_____ <input type="checkbox"/> Yes – ESH can be repaired, replaced by DHC or upgraded to renewables. <input type="checkbox"/> No – ESH can be replaced by HHR ESH, a DHC, upgraded to renewables or, where the home meets the FTCH criteria, FTCH.	Maximum cost of repair as identified in the 'Economic Repair Cost Comparison Table': (Exc. VAT) £_____ <input type="checkbox"/> Yes – ESH can be repaired, replaced by DHC or upgraded to renewables. <input type="checkbox"/> No – ESH can be replaced by HHR ESH, a DHC, upgraded to renewables or, where the home meets the FTCH criteria, FTCH.

<sup>9</sup> A screenshot should be retained to confirm parts were not available within a reasonable timeframe.

<sup>10</sup> See Electric Storage repair cost comparison table in section I.

## D. Room Heaters and No Heating

D.	Existing heating source details
1	<div data-bbox="284 398 547 488">Existing pre main heating source</div> <div data-bbox="655 409 1382 772"> <input type="checkbox"/> Bottled LPG Room Heaters  <input type="checkbox"/> Solid Fossil Room Heaters  <input type="checkbox"/> Gas Fire with Back Boiler<sup>11</sup>  <input type="checkbox"/> Gas Room Heaters  <input type="checkbox"/> Electric Room Heaters including direct acting room heaters  <input type="checkbox"/> No heating present  <input type="checkbox"/> Other _____ </div>
<p>A First Time Central Heating measure may be installed if a property</p> <ul style="list-style-type: none"> <li>• does not have, and has not previously had, a wet central heating system, and</li> <li>• at no point since 1 April 2022 contained an efficient ESH (SAP responsiveness rating of more than 0.2) that is not broken down or if it is broken down can be economically repaired</li> </ul>	

<sup>11</sup> Where the premises contains a back boiler, FTCH may only be installed if the back boiler does not supply a central heating system.

## E. Air Source Heat Pump (ASHP)

E.	Existing heating source details
1	<p>Heat pump details</p> <p>Brand and model: _____</p> <p>Model qualifier: _____</p> <p>Serial number: _____</p>
2	<p>Age of heat pump / year of original commissioning (Tick relevant boxes and provide pictorial evidence)</p> <p> <input type="checkbox"/> ASHP name plate  <input type="checkbox"/> Installation Certificate  <input type="checkbox"/> Warranty documentation  <input type="checkbox"/> PCDB final year of manufacture  <input type="checkbox"/> Other (state below) _____         </p>
3	<p>Is the heat pump broken down?</p> <p> <input type="checkbox"/> Yes (can only be replaced or upgraded to renewables)  <input type="checkbox"/> No (Can be repaired if parts are available)         </p>
4	<p>Are all parts required for the repair available? (e.g. if parts are available at a reasonable cost and within a reasonable timeframe or if the repair does not require any <b>parts tick 'Yes'</b>)</p> <p> <input type="checkbox"/> Yes  <input type="checkbox"/> No, please enter reasons            _____            _____         </p>
5	<p>Is the actual cost of repair more than the actual cost of a replacement heat pump? Complete cost table in section H to determine.</p> <p> <input type="checkbox"/> Yes – heat pump may be replaced.  <input type="checkbox"/> No            Cost of repair: (Exc. VAT) £ _____            Cost of replacement: (Exc. VAT) £ _____         </p>
6	<p>Is the actual cost of repair less than the maximum cost of repair as identified in the <b>"Economic Repair Cost Comparison Tables"</b></p> <p> <input type="checkbox"/> Yes, the ASHP should be repaired. Please use Section H to provide details of repair undertaken  <input type="checkbox"/> No, the ASHP should be replaced         </p>

E.	Existing heating source details
7	ASHP Heat Pump Fault <sup>12</sup>
<input type="checkbox"/> Corrosion or fouling of the boiler heat exchange <input type="checkbox"/> Compressor failure <input type="checkbox"/> Expansion valve failure <input type="checkbox"/> Fan motor failure <input type="checkbox"/> Circulator/Pump failure <input type="checkbox"/> Damaged evaporator that affects performance of ASHP <input type="checkbox"/> Loss of refrigerant pressure <input type="checkbox"/> Controller/PCB fault <input type="checkbox"/> External casing damage that affects performance of ASHP <input type="checkbox"/> Any other mechanical or electrical fault (please describe below) <input type="checkbox"/> ASHP and system sludge (Sludge alone may not be sufficient grounds to be considered broke in the ECO4 scheme) <input type="checkbox"/> Primary flow rate unsatisfactory or outside ASHP manufacture tolerance <input type="checkbox"/> Primary flow temperature unsatisfactory or outside ASHP manufacturer tolerance <input type="checkbox"/> Other (please describe below)	
Other: (Provide a detailed description)	
<p>Please write how you identified the failure and any associated symptoms. This may include any tests or checks carried out on the ASHP to identify the symptoms. (This information will be used during audit to determine whether the ASHP was correctly assessed. Therefore, provide as much information as possible.)</p>	

<sup>12</sup> Select the appropriate fault(s) that resulted in the heat pump being broken down or not functioning efficiently and complete all sections of this question. (Note: this list is not exhaustive. Record any other faults not included in this list under 'Other').



## F. District Heating Connection (DHC) Measures

F. Existing heating source details where existing heat source is a DHS			
1	If the pre-main heat source is a DHS, is the existing DHC connected to:	<input type="checkbox"/> An efficient DHS <sup>13</sup> (Please detail) <input type="checkbox"/> An inefficient DHS <sup>14</sup> (Please detail) <input type="checkbox"/> N/A	Detail:
2	If the pre-main heat source is a DHS, is the DHC:	<input type="checkbox"/> Broken, and economically repairable (Please detail) <input type="checkbox"/> Broken, and not economically repairable (Please detail) <input type="checkbox"/> Working <input type="checkbox"/> N/A	Detail:

F. Details for DHC repairs (only complete for repairs)	
A DHC must meet certain criteria to determine whether it is broken down and can be repaired.	
3	Has the off-gas heating hierarchy been followed? <div style="text-align: right;"> <input type="checkbox"/> Yes    <input type="checkbox"/> No    <input type="checkbox"/> N/A           </div>
4	<p>To evidence that the DHC is broken, identify all faults. Please write how you identified the failure and any associated symptoms. This may include any tests or checks carried out to identify the symptoms. (This information will be used during audit to determine whether the DHC was correctly assessed. Therefore, provide as much information as possible.)</p>

<sup>13</sup> If yes, and **working or** economically repairable, a new DHC would not be eligible under ECO4.

<sup>14</sup> If yes, and if the premises is on-gas, then a DHC repair would not be eligible.

## G. Insulation Pre-Conditions and Off-Gas Hierarchy

### 1 Insulation Pre-conditions<sup>15</sup>

Under ECO4, all heating measures including heating controls and solar PV are subject to insulation pre-conditions.

Band E, F and G homes, and band D homes receiving DHC or FTCH: pre-conditions are met if either:

- for any single relevant construction element, b) applies, or
- for all relevant construction elements, a), c) or d) applies

Band D homes except those receiving DHC or FTCH: pre-conditions are met if, for all relevant construction elements, a), b), c), or d) applies.

Construction elements for homes other than mobile homes		SAP bands relevant to:
Exterior Cavity Wall:	<input type="checkbox"/> a) Pre-existing insulation meets prescribed standards <sup>16</sup> <input type="checkbox"/> b) Installed as part of project <input type="checkbox"/> c) Could not be installed due to exemptions <input type="checkbox"/> d) Construction element not present <input type="checkbox"/> e) N/A	All
Room In Roof:	<input type="checkbox"/> a) Pre-existing insulation meets prescribed standards <sup>16</sup> <input type="checkbox"/> b) Installed as part of project <input type="checkbox"/> c) Could not be installed due to exemptions <input type="checkbox"/> d) Construction element not present <input type="checkbox"/> e) N/A	All
Flat Roof:	<input type="checkbox"/> a) Pre-existing insulation meets prescribed standards <sup>16</sup> <input type="checkbox"/> b) Installed as part of project <input type="checkbox"/> c) Could not be installed due to exemptions <input type="checkbox"/> d) Construction element not present <input type="checkbox"/> e) N/A	All

<sup>15</sup> N/A should be entered where the measure is not a measure type to which the minimum insulation requirements apply.

<sup>16</sup> Please refer to ECO4 Guidance: Delivery v1.1 (5.60)

Pitched Roof:	<input type="checkbox"/> a) Pre-existing insulation meets prescribed standards <sup>16</sup> <input type="checkbox"/> b) Installed as part of project <input type="checkbox"/> c) Could not be installed due to exemptions <input type="checkbox"/> d) Construction element not present <input type="checkbox"/> e) N/A	All
Loft:	<input type="checkbox"/> a) Pre-existing insulation meets prescribed standards <sup>16</sup> <input type="checkbox"/> b) Installed as part of project <input type="checkbox"/> c) Could not be installed due to exemptions <input type="checkbox"/> d) Construction element not present <input type="checkbox"/> e) N/A	Band G, F and E. Band D if installing DHC or FTCH
External Solid Wall:	<input type="checkbox"/> a) Pre-existing insulation meets prescribed standards <sup>16</sup> <input type="checkbox"/> b) Installed as part of project <input type="checkbox"/> c) Could not be installed due to exemptions <input type="checkbox"/> d) Construction element not present <input type="checkbox"/> e) N/A	Band D except DHC and FTCH
Heat Loss Floor:	<input type="checkbox"/> a) Pre-existing insulation meets prescribed standards <sup>16</sup> <input type="checkbox"/> b) Installed as part of project <input type="checkbox"/> c) Could not be installed due to exemptions <input type="checkbox"/> d) Construction element not present <input type="checkbox"/> e) N/A	Band D except DHC and FTCH
Party Cavity Wall:	<input type="checkbox"/> a) Pre-existing insulation meets prescribed standards <sup>16</sup> <input type="checkbox"/> b) Installed as part of project <input type="checkbox"/> c) Could not be installed due to exemptions <input type="checkbox"/> d) Construction element not present <input type="checkbox"/> e) N/A	Band D except DHC and FTCH

Construction elements for mobile homes		SAP bands relevant to:
Mobile home: wall, roof and floor	<input type="checkbox"/> a) Insulation equivalent to BS 3632: 2015 before project started <input type="checkbox"/> b) Installed as part of project <input type="checkbox"/> c) Could not be installed due to exemptions <input type="checkbox"/> e) N/A	All
<b>2 Off-Gas Heating Hierarchy <sup>17</sup> (This section must be filled in for homes which did not have a gas meter on 1 April 2022 – question A.5)</b>		
Are any heating measures in the off-gas heating hierarchy above the heating measure being installed not possible to install or does an exemption apply?		Yes (Tick relevant boxes below)  No, the measure being installed is from the first level of the off-gas hierarchy
Not reasonably practicable (shown to be not technically feasible and may result in increase of costs)		
<input type="checkbox"/> Exemption applies	Please explain reason for exemption. <hr/> <hr/>	
<input type="checkbox"/> In relation to the installation of equipment for the generation of heat wholly or partly from <b>biomass</b> , the premises are not in a rural area		
<input type="checkbox"/> One or more improvement options evaluation reports in relation to the premises are held on the TrustMark Data Warehouse, and the measure is not amongst the measures recommended in the most recent improvement options evaluation report.		
<input type="checkbox"/> No improvement options evaluation report in relation to the premises is held on the TrustMark Data Warehouse; one or more EPC recommendation reports have been issued for the premises; and the measure is not amongst the measures recommended in the most recent EPC recommendation report.		

<sup>17</sup> Please see chapter 5 of the ECO4 Delivery Guidance for information on the off-gas heating hierarchy.

3	Pre-Insulation and Off-Gas Hierarchy Declaration	
I hereby declare that to the best of my knowledge and belief that the information provided above is true and accurate.		Yes
Retrofit Coordinator or DHC Operative name		
Retrofit Coordinator or DHC Operative signature and date:		

Repair Quote	
Item	Cost
Warranty cost	
Labour estimated for _____ hours at £_____ per hour	
Total excluding VAT	
VAT 20%	
Total	

## Replacement Quote

Item

Cost

Warranty cost

Labour estimated for \_\_\_\_\_ hours at £\_\_\_\_\_ per hour

Total excluding VATVAT 20%

---

Total

## I. Repair Cost Threshold Table and Average Repair Table

### Repair Cost Tables<sup>18</sup>

These tables provide guidance in determining when a mains gas or oil boiler cannot be economically repaired. Tables 1.1-3.2 show what the maximum repair costs are for boilers and ESH – the tables show the maximum repair costs for boilers and ESHs different types and ages. If the actual cost of repair is higher than the relevant maximum cost, it is considered more economical to replace rather than repair the heating system and as such it is judged that it cannot be economically repaired.

The maximum costs are derived from the type of heating, the estimated average installation cost of replacing the heating system, and its age. These costs have been developed in tandem with industry.

Table 4 shows representative repair costs for important boiler components to help installers come to an estimate of how much a given repair should cost – installers should keep in mind contingent factors in costs such as regional variations. These are intended as a guide to help installers come to a conclusion of how much they should be charging for a repair of common boiler parts.

There are examples of how to use these tables in this document. For broken LPG boilers, operatives should use the relevant mains gas table. **For broken DHCs and renewable heating systems, operatives should use the oil combination boiler table.** Note that the below tables take into consideration both the costs of the parts themselves and labour. Whilst we are unable to provide separate estimates of labour costs, most boiler repairs for relatively simple issues take 1-2 hours.

<sup>18</sup> Note that all costs shown are exclusive of VAT.



## i. Boiler Tables

Table 1.1 Maximum repair cost for mains gas combination boiler

Age of boiler	Cost
1	£3,492
2	£3,201.60
3	£2,910
4	£2,619.60
5	£2,328
6	£2,037.60
7	£1,746
8	£1,455.60
9	£1,164
10	£873.60
11	£582
12	£291.60
13+	£ nil

Table 1.2 Maximum repair cost for mains gas regular boiler

Age of boiler	Cost
1	£1,992
2	£1,826.40
3	£1,660
4	£1,494
5	£1,328
6	£1,161.60
7	£996
8	£830.40
9	£664
10	£498
11	£332
12	£165.60
13+	£ nil

Table 2.1 Maximum repair cost for oil combination boiler

Age of boiler	Cost
1	£5,304
2	£4,862.40
3	£4,421
4	£3,979.20
5	£3,538
6	£3,096
7	£2,654
8	£2,212.80
9	£1,771
10	£1,329.60
11	£888
12	£446.40
13+	£ nil

Table 2.2 Maximum repair cost for oil regular boiler

Age of boiler	Cost
1	£2,304
2	£2,112
3	£1,920
4	£1,728
5	£1,536
6	£1,344
7	£1,152
8	£960
9	£768
10	£576
11	£384
12	£192
13+	£ nil

### Example of how to use these tables:

Boiler type: Mains gas,  
Regular  
Age: 4 years

If boiler repair work costs over £1,494, this boiler can be replaced. If the boiler repair work costs less than £1,494, boiler repair should be carried out.

Age of boiler	
1	£1,992
2	£1,826.40
3	£1,660
4	£1,494
5	£1,328
6	£1,161.60
7	£996
8	£830.40
9	£664
10	£498
11	£332
12	£165.60
13+	£ nil

Average repair cost of boiler components			
Boiler part	Average cost	Boiler part	Average cost
Air pressure switch	£160	Diverter valve	£240
Ignition	£140	Heat exchanger	£330
Timer	£70	Pump	£200
Thermocouple	£80	Pressure relief valve	£95
Overheat thermostat	£95	Gas valve	£210
Burner	£100	Printed circuit board	£240
Automatic air vent	£90	Fan	£235
Flue	£125	Expansion vessel	£230

## ii. Electric Storage Heater Tables

### Example of how to use this table:

ESH type: Fan storage heater  
Age: 6 years

|

If ESH repair work costs over £715, this ESH can be replaced. If the ESH repair work costs less than £715, ESH repair should be carried out.

Go through this process for each ESH being assessed in a given property.

Table 3.2 Maximum repair cost for fan storage/high heat retention storage heater

Age of boiler	Cost
<b>1-4</b>	<b>£858</b>
<b>5</b>	£787.20
<b>6</b>	£715
<b>7</b>	£643.20
<b>8</b>	£572
<b>9</b>	£500.40
<b>10</b>	£430
<b>11</b>	£357.60
<b>12</b>	£286
<b>13</b>	£214.80

### iii. Heat Pump Tables

Table 4.1 Maximum repair cost for air source heat pump	
Age of boiler	Cost
1	£10,233.3
2	£9,551.1
3	£8,868.9
4	£8,186.6
5	£7,504.4
6	£6,822.2
7	£6,140.0
8	£5,457.8
9	£4,775.5
10	£4,093.3
11	£3,411.1
12	£2,728.9
13	£2,046.7
14	£1,364.4
15	£682.2
16+	£Nil

Example of how to use this table:

Heat pump type: Air source heat pump

Age: 10 years

If ASHP repair work costs over £4,093.30, this ASHP can be replaced. If the ASHP repair work costs less than £4,093.30, then ASHP repair work should be carried out unless the actual cost of repair is greater than the actual quoted cost of replacing the ASHP.

Table 4.1 Maximum repair cost for air source heat pump

Age of boiler	Cost
1	£10,233.3
2	£9,551.1
3	£8,868.9
4	£8,186.6
5	£7,504.4
6	£6,822.2
7	£6,140.0
8	£5,457.8
9	£4,775.5
10	£4,093.3
11	£3,411.1
12	£2,728.9
13	£2,046.7
14	£1,364.4
15	£682.2
16+	£Nil

# **RIRI CHECKLIST**

## ECO4 Room-in-Roof (RIR) Checklist

Measure address		Operative Print Name <sup>1</sup> :
	Post code: _____	Signature: _____ Date: __/__/____

- This checklist is a guide only and does not exempt the installer from their responsibility to ensure the correct requirements are followed. For ECO purposes this checklist requires both pre and post installation details to be recorded. For further guidance on Ofgem's requirements for room-in-roof insulation (RIRI), please see [ECO4 Guidance: Delivery](#).
- Please complete the table below to enter the data for each element in the room-in-roof and also the percentage that has been insulated. All elements **must be** insulated to 100% unless there are reasonable grounds for not doing so. Total area insulated (m<sup>2</sup>) must be entered for all elements (even if the element is not being insulated) and the overall percentage of the measure installed must be entered for the grand total.
- Where existing insulation is present in part of the room-in-roof (e.g. the gable or party wall), the percentage of measure installed (POMI) and the percentage of property treated (POPT) must be reduced to reflect this.

Elements of Room-in-Roof (PAS Annex B12)	Total Area (m <sup>2</sup> )	Pre-Installation; Is this element already fully insulated <sup>2</sup> ? Yes/No	Post-installation; product used (Cert No and description) & thickness installed (mm) <sup>3</sup>	Total area insulated (m <sup>2</sup> ) (excluding any pre-existing insulation)	If total area not insulated state the reason for this, this should include where elements are not applicable (eg mid-terrace properties, hipped roof etc) (photographs/customer declaration required)
Flat Ceilings					
Stud walls <sup>4</sup>					
Sloping ceiling					
Gable walls					
Party walls					
Dormer windows					
<b>Grand Total</b>					

Residual areas <sup>5</sup> insulated by installer	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	Post-installation; product used (Cert No and description) & thickness installed (mm) <sup>3</sup>		Percentage of RIRI measure installed	
--	---	---	--	--------------------------------------	--

Total roof area of property <sup>6</sup> (m <sup>2</sup> )	Total RIR + residual area (m <sup>2</sup> )	A = Total RIR + residual area (m <sup>2</sup> ) ÷ total roof area of property (m <sup>2</sup> )	B = Percentage of RIRI measure installed (from above table)	Percentage of property treated = A x B

<sup>1</sup> I confirm that, to the best of my knowledge, the information below is accurate and the works covered by this declaration do not form part of a loft conversion or a wider refurbishment to the property.

I have discussed the installation with the customer and explored the use of all appropriate technologies to provide 100% insulation of the room-in-roof.

<sup>2</sup> Fully insulated means no insulation needs to be added to bring up to relevant standards.

<sup>3</sup> Photographic evidence of each element pre and post installation should be retained. Thickness entered must be the actual thickness installed.

<sup>4</sup> Any hatches or doors on stud walls must also be 100% insulated.

<sup>5</sup> The residual area is the area of continuous loft air space immediately connected to the room-in-roof; N/A = no residual area associated with the room-in-roof.

<sup>6</sup> Total floor plan area of all roof space (include any pitched roof, flat roof or pitched roof containing a RIRI)

<div data-bbox="107 165 1612 1165"> <p>Diagram illustrating the components of a roof structure and their associated areas:</p> <ul style="list-style-type: none"> <li><b>RIR Floor Area:</b> <math>m^2</math></li> <li><b>Flat Ceiling:</b> <math>m^2</math></li> <li><b>Gable:</b> <math>m^2</math></li> <li><b>Party Wall:</b> <math>m^2</math></li> <li><b>Total Roof Area:</b> <math>m^2</math></li> <li><b>Slope:</b> <math>m^2</math></li> <li><b>Stud Wall:</b> <math>m^2</math></li> <li><b>Residual Loft Space:</b> <math>m^2</math></li> <li><b>Dormer Window 1:</b> <math>m^2</math> (Ceiling and reveals)</li> <li><b>Dormer Window 2:</b> <math>m^2</math> (Ceiling and reveals)</li> <li><b>Dormer Window 3:</b> <math>m^2</math> (Ceiling and reveals)</li> </ul> </div>	<p><b><u>Notes and Annotations</u></b></p>
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**IWI**

**PIBI**



# Energy Saving Group

## Internal Wall Insulation Pre-Installation Building Inspection Form Annex B8

Customer Information		
Contact Name:		
Address:		
Telephone:		
Email:		
Project Details		
Specifiers Contact Details:	Energy Saving Group Ltd Mclaren, 46 The Priory Queensway, Birmingham, B4 7LR	E - info@energysavinggroup.net T - 02037976332
Product Type:	Internal Wall Insulation	

Is there any pre-existing damage to the areas that will be accessed by the installation operatives?	No
What is the extent of the area and elements to be insulated?	
Have the relevant checks been undertaken to determine if asbestos-containing materials are present?	Yes
Is the condition of the wall suitable for the works to commence in relation to:	
The existence of appropriate ventilation arrangements?	Yes
Free from rodents/pests and protected species, e.g. bats?	Yes
The timbers being free from rot and/or infestation?	Yes
The condition of the floor?	Yes
Metal structural being free from visible signs of corrosion?	Yes

# Energy Saving Group

## Internal Wall Insulation Pre-Installation Building Inspection Form Annex B8

Electrical wiring being free from visible defects? (e.g. Damaged cables, trailing cables, exposed conductors)	Yes
No visible signs of water penetration	Yes
No visible signs of leakage from water system components, e.g. pipework, cisterns, tanks, etc.	Yes
<b>Following investigation, will the proposed installation</b>	
Be non-compliant with any requirements stated by the designer/specifier?	No
Compromise the functionality of existing air supply/extract ventilation ducts/systems?	No
Result in unsafe operation of a combustion appliance?	No
Result in non-compliance with the building regulations, e.g. in relation to workmanship; materials; fire safety; resistance to moisture?	No
<b>Will the site layout or conditions impair the execution of the works in relation to:</b>	
Appropriate access to the property and to the Loft space?	No
The space free from stored items, boarding etc.	No

# Energy Saving Group

## Internal Wall Insulation Pre-Installation Building Inspection Form Annex B8

Wall Plan

# Energy Saving Group

## Internal Wall Insulation Pre-Installation Building Inspection Form Annex B8

General	
Is there any potential for moisture build up as a result of the installation?	No
Will the functionality and/or safety of installed services (gas, electricity, water, telecommunications etc.) be affected in any way as a result of the installation?	No
Is there any potential risk in relation to the ongoing performance of installed services? (If YES liaison with measure specifiers and/or service providers will need to take place).	No
<b>This Building Inspection must be carried out in conjunction with the full Design Specification and the prepared Method Statement.</b>	
From the findings of this building inspection, is the installation able to be carried out in line with the full Design Specification?	Yes
From the findings of this building inspection, is the Method Statement suitable and complete?	Yes
Is there any evidence that any form of protected species would be disturbed by the installation process?	No
<b>NOTE: Any changes needing to be made or problems encountered as a result of this building inspection are required to be discussed with the specifier and/or customer as appropriate and agreement reached on how to proceed before work commences.</b>	

Carbon Monoxide and other Safety Alarms		
Where carbon monoxide (CO) or other safety alarms have already been installed at the designated location, the building inspector should enquire of the customer whether or not they have been tested in accordance with the alarm system design specification and/or the manufacturer's instructions.		
Location:	Type of Alarm:	Test Result:

# Energy Saving Group

## Internal Wall Insulation Pre-Installation Building Inspection Form Annex B8

Customer Understanding of the Extent of the Works	
Does the customer understand the nature and extent of the work?	Yes
Have they been made aware of any disruption that may be caused (for example rubbish disposal and the siting of skips)	Yes
Does the customer have any particular requests or requirements?	No
Are the arrangements for site access and the storage of installation materials adequate and appropriate?	Yes
Is there any other information which would help ensure the smooth running of the installation process?	No
This building inspection and its findings, including those relating to the suitability and completeness of the installation method statement, the EEM specification and any customer-related issues, shall be made by the building inspector and retained by the installer, with a copy being made available to the EEM specifier.	
Customer Sign Off	
By signing the below, you agree to the following statements:	
<ul style="list-style-type: none"><li>• We have explained and you are aware of the nature and extent of the installation and this meets your expectations</li><li>• The Arrangements we have made for site access and installation materials storage are adequate and appropriate for the installation to be undertaken.</li></ul>	
Signature	
Date	

Building inspection carried out by:

Signed:

Date:

**EWI**

**PIBI**

# Energy Saving Group

## External Wall Insulation Pre-Installation Building Inspection Form Annex B4

Customer Information		
Contact Name:		
Address:		
Telephone:		
Email:		
Project Details		
Specifiers Contact Details:	Energy Saving Group Ltd McLaren, 46 The Priory Queensway, Birmingham, B4 7LR E - info@energysavinggroup.net T - 02037976332	
Product Type:	Internal Wall Insulation	

Is there any pre-existing damage to the areas that will be accessed by the installation operatives?	No
What is the extent of the area and elements to be insulated?	
Have the relevant checks been undertaken to determine if asbestos-containing materials are present?	Yes
Is the condition of the wall suitable for the works to commence in relation to:	
The existence of appropriate ventilation arrangements?	Yes
Free from rodents/pests and protected species, e.g. bats?	Yes
The timbers being free from rot and/or infestation?	Yes
The condition of the floor?	Yes
Metal structural being free from visible signs of corrosion?	Yes

# Energy Saving Group

## External Wall Insulation Pre- Installation Building Inspection Form Annex B4

Electrical wiring being free from visible defects? (e.g. Damaged cables, trailing cables, exposed conductors)	Yes
No visible signs of water penetration	Yes
No visible signs of leakage from water system components, e.g. pipework, cisterns, tanks, etc.	Yes
<b>Following investigation, will the proposed installation</b>	
Be non-compliant with any requirements stated by the designer/specifier?	No
Compromise the functionality of existing air supply/extract ventilation ducts/systems?	No
Result in unsafe operation of a combustion appliance?	No
Result in non-compliance with the building regulations, e.g. in relation to workmanship; materials; fire safety; resistance to moisture?	No
<b>Will the site layout or conditions impair the execution of the works in relation to:</b>	
Appropriate access to the property and to the Loft space?	No
The space free from stored items, boarding etc.	No



## External Wall Insulation Pre-Installation Building Inspection Form Annex B4

Wall Plan

# Energy Saving Group

## External Wall Insulation Pre-Installation Building Inspection Form Annex B4

General	
Is there any potential for moisture build up as a result of the installation?	No
Will the functionality and/or safety of installed services (gas, electricity, water, telecommunications etc.) be affected in any way as a result of the installation?	No
Is there any potential risk in relation to the ongoing performance of installed services? (If YES liaison with measure specifiers and/or service providers will need to take place).	No
<b>This Building Inspection must be carried out in conjunction with the full Design Specification and the prepared Method Statement.</b>	
From the findings of this building inspection, is the installation able to be carried out in line with the full Design Specification?	Yes
From the findings of this building inspection, is the Method Statement suitable and complete?	Yes
Is there any evidence that any form of protected species would be disturbed by the installation process?	No
<b>NOTE: Any changes needing to be made or problems encountered as a result of this building inspection are required to be discussed with the specifier and/or customer as appropriate and agreement reached on how to proceed before work commences.</b>	

Carbon Monoxide and other Safety Alarms		
Where carbon monoxide (CO) or other safety alarms have already been installed at the designated location, the building inspector should enquire of the customer whether or not they have been tested in accordance with the alarm system design specification and/or the manufacturer's instructions.		
Location:	Type of Alarm:	Test Result:

# Energy Saving Group

## External Wall Insulation Pre-Installation Building Inspection Form Annex B4

Customer Understanding of the Extent of the Works	
Does the customer understand the nature and extent of the work?	Yes
Have they been made aware of any disruption that may be caused (for example rubbish disposal and the siting of skips)	Yes
Does the customer have any particular requests or requirements?	No
Are the arrangements for site access and the storage of installation materials adequate and appropriate?	Yes
Is there any other information which would help ensure the smooth running of the installation process?	No
This building inspection and its findings, including those relating to the suitability and completeness of the installation method statement, the EEM specification and any customer-related issues, shall be made by the building inspector and retained by the installer, with a copy being made available to the EEM specifier.	
Customer Sign Off	
By signing the below, you agree to the following statements: <ul style="list-style-type: none"><li>• We have explained and you are aware of the nature and extent of the installation and this meets your expectations</li><li>• The Arrangements we have made for site access and installation materials storage are adequate and appropriate for the installation to be undertaken.</li></ul>	
Signature	
Date	

Building inspection carried out by:

Signed:

Date:

**CWI**

**PIBI**

# Energy Saving Group

## Cavity Wall Insulation Pre-Installation Building Inspection Form Annex B1

Customer Information		
Contact Name:		
Address:		
Telephone:		
Email:		
Project Details		
Specifiers Contact Details:	Energy Saving Group Ltd Mclaren, 46 The Priory Queensway, Birmingham, B4 7LR	E - info@energysavinggroup.net T - 02037976332
Product Type:	Cavity Wall Insulation	

Is there any pre-existing damage to the areas that will be accessed by the installation operatives?	No
What is the extent of the area and elements to be insulated?	
Have the relevant checks been undertaken to determine if asbestos-containing materials are present?	Yes
Is the condition of the wall suitable for the works to commence in relation to:	
The existence of appropriate ventilation arrangements?	Yes
Free from rodents/pests and protected species, e.g. bats?	Yes
The timbers being free from rot and/or infestation?	Yes
The condition of the floor?	Yes
Metal structural being free from visible signs of corrosion?	Yes

# Energy Saving Group

## Cavity Wall Insulation Pre-Installation Building Inspection Form Annex B1

Electrical wiring being free from visible defects? (e.g. Damaged cables, trailing cables, exposed conductors)	Yes
No visible signs of water penetration	Yes
No visible signs of leakage from water system components, e.g. pipework, cisterns, tanks, etc.	Yes
<b>Following investigation, will the proposed installation</b>	
Be non-compliant with any requirements stated by the designer/specifier?	No
Compromise the functionality of existing air supply/extract ventilation ducts/systems?	No
Result in unsafe operation of a combustion appliance?	No
Result in non-compliance with the building regulations, e.g. in relation to workmanship; materials; fire safety; resistance to moisture?	No
<b>Will the site layout or conditions impair the execution of the works in relation to:</b>	
Appropriate access to the property and to the Loft space?	No
The space free from stored items, boarding etc.	No

# Energy Saving Group

## Cavity Wall Insulation Pre-Installation Building Inspection Form Annex B1

Wall Plan

# Energy Saving Group

## Cavity Wall Insulation Pre-Installation Building Inspection Form Annex B1

General	
Is there any potential for moisture build up as a result of the installation?	No
Will the functionality and/or safety of installed services (gas, electricity, water, telecommunications etc.) be affected in any way as a result of the installation?	No
Is there any potential risk in relation to the ongoing performance of installed services? (If YES liaison with measure specifiers and/or service providers will need to take place).	No
<b>This Building Inspection must be carried out in conjunction with the full Design Specification and the prepared Method Statement.</b>	
From the findings of this building inspection, is the installation able to be carried out in line with the full Design Specification?	Yes
From the findings of this building inspection, is the Method Statement suitable and complete?	Yes
Is there any evidence that any form of protected species would be disturbed by the installation process?	No
<b>NOTE: Any changes needing to be made or problems encountered as a result of this building inspection are required to be discussed with the specifier and/or customer as appropriate and agreement reached on how to proceed before work commences.</b>	

Carbon Monoxide and other Safety Alarms		
Where carbon monoxide (CO) or other safety alarms have already been installed at the designated location, the building inspector should enquire of the customer whether or not they have been tested in accordance with the alarm system design specification and/or the manufacturer's instructions.		
Location:	Type of Alarm:	Test Result:



# Energy Saving Group

## Cavity Wall Insulation Pre-Installation Building Inspection Form Annex B1

Customer Understanding of the Extent of the Works	
Does the customer understand the nature and extent of the work?	Yes
Have they been made aware of any disruption that may be caused (for example rubbish disposal and the siting of skips)	Yes
Does the customer have any particular requests or requirements?	No
Are the arrangements for site access and the storage of installation materials adequate and appropriate?	Yes
Is there any other information which would help ensure the smooth running of the installation process?	No
This building inspection and its findings, including those relating to the suitability and completeness of the installation method statement, the EEM specification and any customer-related issues, shall be made by the building inspector and retained by the installer, with a copy being made available to the EEM specifier.	
Customer Sign Off	
By signing the below, you agree to the following statements:	
<ul style="list-style-type: none"><li>• We have explained and you are aware of the nature and extent of the installation and this meets your expectations</li><li>• The Arrangements we have made for site access and installation materials storage are adequate and appropriate for the installation to be undertaken.</li></ul>	
Signature	
Date	

Building inspection carried out by:

Signed:

Date:

**LI**

**PIBI**

# Energy Saving Group

## Loft Insulation Pre-Installation Building Inspection Form Annex B9

Customer Information	
Contact Name:	
Address:	
Telephone:	
Email:	
Project Details	
Specifiers Contact Details:	Energy Saving Group Ltd McLaren, 46 The Priory Queensway, Birmingham, B4 7LR E - info@energysavinggroup.net T - 02037976332
Product Type:	Loft Insulation

Is there any pre-existing damage to the areas that will be accessed by the installation operatives?	No
What is the extent of the area and elements to be insulated?	
Have the relevant checks been undertaken to determine if asbestos-containing materials are present?	Yes
Is the condition of the Loft space suitable for the works to commence in relation to:	
The existence of appropriate Loft space ventilation arrangements?	Yes
The Loft space being free from rodents/pests and protected species, e.g. bats?	Yes
The timbers being free from rot and/or infestation?	Yes
The condition of the floor?	Yes
Metal structural Loft members being free from visible signs of corrosion?	Yes

# Energy Saving Group

## Loft Insulation Pre-Installation Building Inspection Form Annex B9

Electrical wiring being free from visible defects? (e.g. Damaged cables, trailing cables, exposed conductors)	Yes
No visible signs of water penetration	Yes
No visible signs of leakage from water system components, e.g. pipework, cisterns, tanks, etc.	Yes
<b>Following investigation, will the proposed installation</b>	
Be non-compliant with any requirements stated by the designer/specifier?	No
Compromise the functionality of existing air supply/extract ventilation ducts/systems?	No
Result in unsafe operation of a combustion appliance?	No
Result in non-compliance with the building regulations, e.g. in relation to workmanship; materials; fire safety; resistance to moisture?	No
<b>Will the site layout or conditions impair the execution of the works in relation to:</b>	
Appropriate access to the property and to the Loft space?	No
The Loft space being free from stored items, boarding etc.	No

# Energy Saving Group

## Loft Insulation Pre-Installation Building Inspection Form Annex B9

General	
Is there any potential for moisture build up as a result of the installation?	No
Will the functionality and/or safety of installed services (gas, electricity, water, telecommunications etc.) be affected in any way as a result of the installation?	No
Is there any potential risk in relation to the ongoing performance of installed services? (If YES liaison with measure specifiers and/or service providers will need to take place).	No
<b>This Building Inspection must be carried out in conjunction with the full Design Specification and the prepared Method Statement.</b>	
From the findings of this building inspection, is the installation able to be carried out in line with the full Design Specification?	Yes
From the findings of this building inspection, is the Method Statement suitable and complete?	Yes
Is there any evidence that any form of protected species would be disturbed by the installation process?	No
<b>NOTE: Any changes needing to be made or problems encountered as a result of this building inspection are required to be discussed with the specifier and/or customer as appropriate and agreement reached on how to proceed before work commences.</b>	

Carbon Monoxide and other Safety Alarms		
Where carbon monoxide (CO) or other safety alarms have already been installed at the designated location, the building inspector should enquire of the customer whether or not they have been tested in accordance with the alarm system design specification and/or the manufacturer's instructions.		

# Energy Saving Group

## Loft Insulation Pre-Installation Building Inspection Form Annex B9

Customer Understanding of the Extent of the Works	
Does the customer understand the nature and extent of the work?	Yes
Have they been made aware of any disruption that may be caused (for example rubbish disposal and the siting of skips)	Yes
Does the customer have any particular requests or requirements?	No
Are the arrangements for site access and the storage of installation materials adequate and appropriate?	Yes
Is there any other information which would help ensure the smooth running of the installation process?	No
This building inspection and its findings, including those relating to the suitability and completeness of the installation method statement, the EEM specification and any customer-related issues, shall be made by the building inspector and retained by the installer, with a copy being made available to the EEM specifier.	
Customer Sign Off	
By signing the below, you agree to the following statements: <ul style="list-style-type: none"><li>• We have explained and you are aware of the nature and extent of the installation and this meets your expectations</li><li>• The Arrangements we have made for site access and installation materials storage are adequate and appropriate for the installation to be undertaken.</li></ul>	
Signature	
Date	

Building inspection carried out by:

Signed:

Date:

**RIRI**

**PIBI**

# Energy Saving Group

## Room in Roof Insulation Pre-Installation Building Inspection Form Annex B12

Customer Information	
Contact Name:	
Address:	
Telephone:	
Email:	
Project Details	
Specifiers Contact Details:	Energy Saving Group Ltd Mclaren, 46 The Priory Queensway, Birmingham, B4 7LR
Product Type:	ROOM IN ROOF INSULATION

General	
Is there any potential for moisture build up as a result of the installation?	NO
Will the functionality and/or safety of installed services (gas, electricity, water, telecommunications etc.) be affected in any way as a result of the installation?	NO
Is there any potential risk in relation to the ongoing performance of installed services? (If YES liaison with measure specifiers and/or service providers will need to take place).	NO
<b>This Building Inspection must be carried out in conjunction with the full Design Specification and the prepared Method Statement.</b>	
From the findings of this building inspection, is the installation able to be carried out in line with the full Design Specification?	YES
From the findings of this building inspection, is the Method Statement suitable and complete?	YES
Is there any evidence that any form of protected species would be disturbed by the installation process?	NO
<b>NOTE: Any changes needing to be made or problems encountered as a result of this building inspection are required to be discussed with the specifier and/or customer as appropriate and agreement reached on how to proceed before work commences.</b>	



# Energy Saving Group

## Room in Roof Insulation Pre-Installation Building Inspection Form Annex B12

Carbon Monoxide and other Safety Alarms		
Where carbon monoxide (CO) or other safety alarms have already been installed at the designated location, the building inspector should enquire of the customer whether or not they have been tested in accordance with the alarm system design specification and/or the manufacturer's instructions.		
Location:	Type of Alarm:	Test Result:

Customer Understanding of the Extent of the Works	
Does the customer understand the nature and extent of the work?	YES
Have they been made aware of any disruption that may be caused (for example rubbish disposal and the siting of skips)	YES
Does the customer have any particular requests or requirements?	NO
Are the arrangements for site access and the storage of installation materials adequate and appropriate?	YES
Is there any other information which would help ensure the smooth running of the installation process?	NO
This building inspection and its findings, including those relating to the suitability and completeness of the installation method statement, the EEM specification and any customer-related issues, shall be made by the building inspector and retained by the installer, with a copy being made available to the EEM specifier.	
Customer Sign Off	
By signing the below, you agree to the following statements: <ul style="list-style-type: none"><li>We have explained and you are aware of the nature and extent of the installation and this meets your expectations</li><li>The Arrangements we have made for site access and installation materials storage are adequate and appropriate for the installation to be undertaken.</li></ul>	
Signature	
Date	

Building inspection carried out by:

Signed:

Date:

**FRI**  
**PIBI**

# Energy Saving Group

## Flat Roof Insulation Pre-Installation Building Inspection Form Annex B9

Customer Information	
Contact Name:	
Address:	
Telephone:	
Email:	
Project Details	
Specifiers Contact Details:	Energy Saving Group Ltd McLaren, 46 The Priory Queensway, Birmingham, B4 7LR E - info@energysavinggroup.net T - 02037976332
Product Type:	Loft Insulation

Is there any pre-existing damage to the areas that will be accessed by the installation operatives?	No
What is the extent of the area and elements to be insulated?	
Have the relevant checks been undertaken to determine if asbestos-containing materials are present?	Yes
Is the condition of the Flat Roof space suitable for the works to commence in relation to:	
The existence of appropriate Flat Roof space ventilation arrangements?	Yes
The Flat Roof space being free from rodents/pests and protected species, e.g. bats?	Yes
The timbers being free from rot and/or infestation?	Yes
The condition of the floor?	Yes
Metal structural Flat Roof members being free from visible signs of corrosion?	Yes

# Energy Saving Group

## Flat Roof Insulation Pre-Installation Building Inspection Form Annex B9

Electrical wiring being free from visible defects? (e.g. Damaged cables, trailing cables, exposed conductors)	Yes
No visible signs of water penetration	Yes
No visible signs of leakage from water system components, e.g. pipework, cisterns, tanks, etc.	Yes
<b>Following investigation, will the proposed installation</b>	
Be non-compliant with any requirements stated by the designer/specifier?	No
Compromise the functionality of existing air supply/extract ventilation ducts/systems?	No
Result in unsafe operation of a combustion appliance?	No
Result in non-compliance with the building regulations, e.g. in relation to workmanship; materials; fire safety; resistance to moisture?	No
<b>Will the site layout or conditions impair the execution of the works in relation to:</b>	
Appropriate access to the property and to the Loft space?	No
The Flat Roof space being free from stored items, boarding etc.	No

# Energy Saving Group

## Flat Roof Insulation Pre-Installation Building Inspection Form Annex B9

General	
Is there any potential for moisture build up as a result of the installation?	No
Will the functionality and/or safety of installed services (gas, electricity, water, telecommunications etc.) be affected in any way as a result of the installation?	No
Is there any potential risk in relation to the ongoing performance of installed services? (If YES liaison with measure specifiers and/or service providers will need to take place).	No
<b>This Building Inspection must be carried out in conjunction with the full Design Specification and the prepared Method Statement.</b>	
From the findings of this building inspection, is the installation able to be carried out in line with the full Design Specification?	Yes
From the findings of this building inspection, is the Method Statement suitable and complete?	Yes
Is there any evidence that any form of protected species would be disturbed by the installation process?	No
<b>NOTE: Any changes needing to be made or problems encountered as a result of this building inspection are required to be discussed with the specifier and/or customer as appropriate and agreement reached on how to proceed before work commences.</b>	

Carbon Monoxide and other Safety Alarms		
Where carbon monoxide (CO) or other safety alarms have already been installed at the designated location, the building inspector should enquire of the customer whether or not they have been tested in accordance with the alarm system design specification and/or the manufacturer's instructions.		
Location:	Type of Alarm:	Test Result:

# Energy Saving Group

## Flat Roof Insulation Pre-Installation Building Inspection Form Annex B9

Customer Understanding of the Extent of the Works	
Does the customer understand the nature and extent of the work?	Yes
Have they been made aware of any disruption that may be caused (for example rubbish disposal and the siting of skips)	Yes
Does the customer have any particular requests or requirements?	No
Are the arrangements for site access and the storage of installation materials adequate and appropriate?	Yes
Is there any other information which would help ensure the smooth running of the installation process?	No
This building inspection and its findings, including those relating to the suitability and completeness of the installation method statement, the EEM specification and any customer-related issues, shall be made by the building inspector and retained by the installer, with a copy being made available to the EEM specifier.	
Customer Sign Off	
By signing the below, you agree to the following statements: <ul style="list-style-type: none"><li>• We have explained and you are aware of the nature and extent of the installation and this meets your expectations</li><li>• The Arrangements we have made for site access and installation materials storage are adequate and appropriate for the installation to be undertaken.</li></ul>	
Signature	
Date	

Building inspection carried out by:

Signed:

Date:

**TTZC**

**PIBI**

# Energy Saving Group

## Time and Temperature Zone Control Pre-Installation Building Inspection Form Annex C5

### Customer Information

Contact Name:	
Address:	
Telephone:	
Email:	

### Project Details

Specifier Contact Details:	Energy Saving Group Ltd Mclaren, 46 The Priory Queensway, Birmingham, B4 7LR	E - info@energysavinggroup.net T - 02037976332
Product Type:	Time and Temperature Zone Control	

Is the condition of the building fabric satisfactory in relation to the proposed work?	Yes
Is the condition of the existing electrical installation satisfactory in relation to the proposed work?	Yes
Will the installation work result in non-compliance with the Building Regulations in relation to workmanship, materials, structural stability, fire safety, resistance to moisture, heat-producing appliances, electrical safety or conservation of fuel and power?	No
Will the proposed installation result in non-compliance with relevant gas safety regulations?	No
Will the proposed installation be compliant with any requirements stated by the boiler manufacturer?	Yes
Will or may the proposed installation result in a plume nuisance situation?	No
Will any special condensate disposal arrangements be required?	No
Is the building located in a hard water area (above 200 ppm)?	No
Will water conditioning arrangements be required in relation to the water hardness?	No
Have the relevant checks been undertaken to determine if asbestos containing materials are present?	Yes



## Time and Temperature Zone Control Pre-Installation Building Inspection Form Annex C5

### General

Is there any potential for moisture build up as a result of the installation?	No
Will the functionality and/or safety of installed services (gas, electricity, water, telecommunications etc.) be affected in any way as a result of the installation?	No
Can the installation be carried out in line with the full design specification?	Yes
Is there any evidence that any form of protected species would be disturbed by the installation process?	No
From the findings of this building inspection, does the Method Statement need correction or further development?	No

### Carbon Monoxide and other Safety Alarms

Where carbon monoxide (CO) or other safety alarms have already been installed at the designated location, the building inspector should enquire of the customer whether or not they have been tested in accordance with the alarm system design specification and/or the manufacturer's instructions.

Location:	Type of Alarm:	Test Result:

# Energy Saving Group

## Time and Temperature Zone Control Pre-Installation Building Inspection Form Annex C5

Customer Understanding of the Extent of the Works	
Does the customer understand the nature and extent of the work?	Yes
Have they been made aware of any disruption that may be caused (for example rubbish disposal and the siting of skips)	Yes
Does the customer have any particular requests or requirements?	No
Are the arrangements for site access and the storage of installation materials adequate and appropriate?	Yes
Is there any other information which would help ensure the smooth running of the installation process?	No
This building inspection and its findings, including those relating to the suitability and completeness of the installation method statement, the EEM specification and any customer-related issues, shall be made by the building inspector and retained by the installer, with a copy being made available to the EEM specifier.	
Customer Sign Off	
By signing the below, you agree to the following statements: <ul style="list-style-type: none"><li>• We have explained and you are aware of the nature and extent of the installation and this meets your expectations</li><li>• The Arrangements we have made for site access and installation materials storage are adequate and appropriate for the installation to be undertaken.</li></ul>	
Signature	
Date	

Building Inspection Carried Out By:

Signed:

Date:

**FTCH**

**PIBI**

# Energy Saving Group

## First Time Central Heating Pre-Installation Building Inspection Form Annex C1, C4, C5

### Customer Information

Contact Name:	
Address:	
Telephone:	
Email:	

### Project Details

Specifier Contact Details:	Energy Saving Group Ltd McLaren, 46 The Priory Queensway, Birmingham, B4 7LR	E - info@energysavinggroup.net T - 02037976332
Product Type:	First Time Central Heating	

Is the condition of the building fabric satisfactory in relation to the proposed work?	Yes
Is the condition of the existing electrical installation satisfactory in relation to the proposed work?	Yes
Will the installation work result in non-compliance with the Building Regulations in relation to workmanship, materials, structural stability, fire safety, resistance to moisture, heat-producing appliances, electrical safety or conservation of fuel and power?	No
Will the proposed installation result in non-compliance with relevant gas safety regulations?	No
Will the proposed installation be compliant with any requirements stated by the manufacturer?	Yes
Will or may the proposed installation result in a plume nuisance situation?	No
Will any special condensate disposal arrangements be required?	No
Is the building located in a hard water area (above 200 ppm)?	No
Will water conditioning arrangements be required in relation to the water hardness?	No
Have the relevant checks been undertaken to determine if asbestos containing materials are present?	Yes

# Energy Saving Group

## First Time Central Heating Pre-Installation Building Inspection Form Annex C1, C4, C5

### General

Is there any potential for moisture build up as a result of the installation?	No
Will the functionality and/or safety of installed services (gas, electricity, water, telecommunications etc.) be affected in any way as a result of the installation?	No
Can the installation be carried out in line with the full design specification?	Yes
Is there any evidence that any form of protected species would be disturbed by the installation process?	No
From the findings of this building inspection, does the Method Statement need correction or further development?	No

### Carbon Monoxide and other Safety Alarms

Where carbon monoxide (CO) or other safety alarms have already been installed at the designated location, the building inspector should enquire of the customer whether or not they have been tested in accordance with the alarm system design specification and/or the manufacturer's instructions.

Location:	Type of Alarm:	Test Result:

# Energy Saving Group

## First Time Central Heating Pre-Installation Building Inspection Form Annex C1, C4, C5

Customer Understanding of the Extent of the Works	
Does the customer understand the nature and extent of the work?	Yes
Have they been made aware of any disruption that may be caused (for example rubbish disposal and the siting of skips)	Yes
Does the customer have any particular requests or requirements?	No
Are the arrangements for site access and the storage of installation materials adequate and appropriate?	Yes
Is there any other information which would help ensure the smooth running of the installation process?	No
This building inspection and its findings, including those relating to the suitability and completeness of the installation method statement, the EEM specification and any customer-related issues, shall be made by the building inspector and retained by the installer, with a copy being made available to the EEM specifier.	
Customer Sign Off	
By signing the below, you agree to the following statements: <ul style="list-style-type: none"><li>• We have explained and you are aware of the nature and extent of the installation and this meets your expectations</li><li>• The Arrangements we have made for site access and installation materials storage are adequate and appropriate for the installation to be undertaken.</li></ul>	
Signature	
Date	

Building Inspection Carried Out By:

Signed:

Date:

**HC**  
**PIBI**

# Energy Saving Group

## Heating Controls Pre-Installation Building Inspection Form Annex C5

### Customer Information

Contact Name:	
Address:	
Telephone:	
Email:	

### Project Details

Specifier Contact Details:	Energy Saving Group Ltd Mclaren, 46 The Priory Queensway, Birmingham, B4 7LR	E - info@energysavinggroup.net T - 02037976332
Product Type:	Heating Controls	

Is the condition of the building fabric satisfactory in relation to the proposed work?	Yes
Is the condition of the existing electrical installation satisfactory in relation to the proposed work?	Yes
Will the installation work result in non-compliance with the Building Regulations in relation to workmanship, materials, structural stability, fire safety, resistance to moisture, heat-producing appliances, electrical safety or conservation of fuel and power?	No
Will the proposed installation result in non-compliance with relevant gas safety regulations?	No
Will the proposed installation be compliant with any requirements stated by the boiler manufacturer?	Yes
Will or may the proposed installation result in a plume nuisance situation?	No
Will any special condensate disposal arrangements be required?	No
Is the building located in a hard water area (above 200 ppm)?	No
Will water conditioning arrangements be required in relation to the water hardness?	No
Have the relevant checks been undertaken to determine if asbestos containing materials are present?	Yes



## Heating Controls Pre-Installation Building Inspection Form Annex C5

### General

Is there any potential for moisture build up as a result of the installation?	No
Will the functionality and/or safety of installed services (gas, electricity, water, telecommunications etc.) be affected in any way as a result of the installation?	No
Can the installation be carried out in line with the full design specification?	Yes
Is there any evidence that any form of protected species would be disturbed by the installation process?	No
From the findings of this building inspection, does the Method Statement need correction or further development?	No

### Carbon Monoxide and other Safety Alarms

Where carbon monoxide (CO) or other safety alarms have already been installed at the designated location, the building inspector should enquire of the customer whether or not they have been tested in accordance with the alarm system design specification and/or the manufacturer's instructions.

Location:	Type of Alarm:	Test Result:

# Energy Saving Group

## Heating Controls Pre-Installation Building Inspection Form Annex C5

Customer Understanding of the Extent of the Works	
Does the customer understand the nature and extent of the work?	Yes
Have they been made aware of any disruption that may be caused (for example rubbish disposal and the siting of skips)	Yes
Does the customer have any particular requests or requirements?	No
Are the arrangements for site access and the storage of installation materials adequate and appropriate?	Yes
Is there any other information which would help ensure the smooth running of the installation process?	No
This building inspection and its findings, including those relating to the suitability and completeness of the installation method statement, the EEM specification and any customer-related issues, shall be made by the building inspector and retained by the installer, with a copy being made available to the EEM specifier.	
Customer Sign Off	
By signing the below, you agree to the following statements: <ul style="list-style-type: none"><li>• We have explained and you are aware of the nature and extent of the installation and this meets your expectations</li><li>• The Arrangements we have made for site access and installation materials storage are adequate and appropriate for the installation to be undertaken.</li></ul>	
Signature	
Date	

Building Inspection Carried Out By:

Signed:

Date:

**GB**  
**PIBI**

# Energy Saving Group

## Natural Gas and LPG Condensing Boilers Pre-Installation Building Inspection Form Annex C1

### Customer Information

Contact Name:	
Address:	
Telephone:	
Email:	

### Project Details

Specifier Contact Details:	Energy Saving Group Ltd Mclaren, 46 The Priory Queensway, Birmingham, B4 7LR	E - info@energysavinggroup.net T - 02037976332
Product Type:	Natural Gas Boiler	

Is the condition of the building fabric satisfactory in relation to the proposed work?	Yes
Is the condition of the existing electrical installation satisfactory in relation to the proposed work?	Yes
Will the installation work result in non-compliance with the Building Regulations in relation to workmanship, materials, structural stability, fire safety, resistance to moisture, heat-producing appliances, electrical safety or conservation of fuel and power?	No
Will the proposed installation result in non-compliance with relevant gas safety regulations?	No
Will the proposed installation be compliant with any requirements stated by the boiler manufacturer?	Yes
Will or may the proposed installation result in a plume nuisance situation?	No
Will any special condensate disposal arrangements be required?	No
Is the building located in a hard water area (above 200 ppm)?	No
Will water conditioning arrangements be required in relation to the water hardness?	No
Have the relevant checks been undertaken to determine if asbestos containing materials are present?	Yes

# Energy Saving Group

## Natural Gas and LPG Condensing Boilers Pre-Installation Building Inspection Form Annex C1

### General

Is there any potential for moisture build up as a result of the installation?	No
Will the functionality and/or safety of installed services (gas, electricity, water, telecommunications etc.) be affected in any way as a result of the installation?	No
Can the installation be carried out in line with the full design specification?	Yes
Is there any evidence that any form of protected species would be disturbed by the installation process?	No
From the findings of this building inspection, does the Method Statement need correction or further development?	No

### Carbon Monoxide and other Safety Alarms

Where carbon monoxide (CO) or other safety alarms have already been installed at the designated location, the building inspector should enquire of the customer whether or not they have been tested in accordance with the alarm system design specification and/or the manufacturer's instructions.

Location:	Type of Alarm:	Test Result:

# Energy Saving Group

## Natural Gas and LPG Condensing Boilers Pre-Installation Building Inspection Form Annex C1

Customer Understanding of the Extent of the Works	
Does the customer understand the nature and extent of the work?	Yes
Have they been made aware of any disruption that may be caused (for example rubbish disposal and the siting of skips)	Yes
Does the customer have any particular requests or requirements?	No
Are the arrangements for site access and the storage of installation materials adequate and appropriate?	Yes
Is there any other information which would help ensure the smooth running of the installation process?	No
This building inspection and its findings, including those relating to the suitability and completeness of the installation method statement, the EEM specification and any customer-related issues, shall be made by the building inspector and retained by the installer, with a copy being made available to the EEM specifier.	
Customer Sign Off	
By signing the below, you agree to the following statements: <ul style="list-style-type: none"><li>• We have explained and you are aware of the nature and extent of the installation and this meets your expectations</li><li>• The Arrangements we have made for site access and installation materials storage are adequate and appropriate for the installation to be undertaken.</li></ul>	
Signature	
Date	

Building Inspection Carried Out By:

Signed:

Date:

**ESH**

**PIBI**

# Energy Saving Group

## Electric Storage Heater Pre-Installation Building Inspection Form Annex D1

### Customer Information

Contact Name:	
Address:	
Telephone:	
Email:	

### Project Details

Specifier Contact Details:	Energy Saving Group Ltd McLaren, 46 The Priory Queensway, Birmingham, B4 7LR	E - info@energysavinggroup.net T - 02037976332
Product Type:	Natural Gas Boiler	

Is the condition of the building fabric satisfactory in relation to the proposed work?	Yes
Is the condition of the existing electrical installation satisfactory in relation to the proposed work?	Yes
Will the installation work result in non-compliance with the Building Regulations in relation to workmanship, materials, structural stability, fire safety, resistance to moisture, heat-producing appliances, electrical safety or conservation of fuel and power?	No
Will the proposed installation result in non-compliance with relevant gas safety regulations?	No
Will the proposed installation be compliant with any requirements stated by the boiler manufacturer?	Yes
Will or may the proposed installation result in a plume nuisance situation?	No
Will any special condensate disposal arrangements be required?	No
Is the building located in a hard water area (above 200 ppm)?	No
Will water conditioning arrangements be required in relation to the water hardness?	No
Have the relevant checks been undertaken to determine if asbestos containing materials are present?	Yes



# Energy Saving Group

## Electric Storage Heater Pre-Installation Building Inspection Form Annex D1

### General

Is there any potential for moisture build up as a result of the installation?	No
Will the functionality and/or safety of installed services (gas, electricity, water, telecommunications etc.) be affected in any way as a result of the installation?	No
Can the installation be carried out in line with the full design specification?	Yes
Is there any evidence that any form of protected species would be disturbed by the installation process?	No
From the findings of this building inspection, does the Method Statement need correction or further development?	No

### Carbon Monoxide and other Safety Alarms

Where carbon monoxide (CO) or other safety alarms have already been installed at the designated location, the building inspector should enquire of the customer whether or not they have been tested in accordance with the alarm system design specification and/or the manufacturer's instructions.

Location:	Type of Alarm:	Test Result:

# Energy Saving Group

## Electric Storage Heater Pre-Installation Building Inspection Form Annex D1

Customer Understanding of the Extent of the Works	
Does the customer understand the nature and extent of the work?	Yes
Have they been made aware of any disruption that may be caused (for example rubbish disposal and the siting of skips)	Yes
Does the customer have any particular requests or requirements?	No
Are the arrangements for site access and the storage of installation materials adequate and appropriate?	Yes
Is there any other information which would help ensure the smooth running of the installation process?	No
This building inspection and its findings, including those relating to the suitability and completeness of the installation method statement, the EEM specification and any customer-related issues, shall be made by the building inspector and retained by the installer, with a copy being made available to the EEM specifier.	
Customer Sign Off	
By signing the below, you agree to the following statements: <ul style="list-style-type: none"><li>• We have explained and you are aware of the nature and extent of the installation and this meets your expectations</li><li>• The Arrangements we have made for site access and installation materials storage are adequate and appropriate for the installation to be undertaken.</li></ul>	
Signature	
Date	

Building Inspection Carried Out By:

Signed:

Date:

**ASHP**  
**PIBI**

# Energy Saving Group

## Air Source Heat Pump Pre-Installation Building Inspection Form

Customer Information	
Contact Name:	
Address:	
Telephone:	
Email:	
Project Details	
Specifiers Contact Details:	Energy Saving Group Ltd Mclaren, 46 The Priory Queensway, Birmingham, B4 7LR
Product Type:	Air Source Heat Pump

General	
Is there any potential for moisture build up as a result of the installation?	NO
Will the functionality and/or safety of installed services (gas, electricity, water, telecommunications etc.) be affected in any way as a result of the installation?	NO
Is there any potential risk in relation to the ongoing performance of installed services? (If YES liaison with measure specifiers and/or service providers will need to take place).	NO
<b>This Building Inspection must be carried out in conjunction with the full Design Specification and the prepared Method Statement.</b>	
From the findings of this building inspection, is the installation able to be carried out in line with the full Design Specification?	YES
From the findings of this building inspection, is the Method Statement suitable and complete?	YES
Is there any evidence that any form of protected species would be disturbed by the installation process?	NO
<b>NOTE: Any changes needing to be made or problems encountered as a result of this building inspection are required to be discussed with the specifier and/or customer as appropriate and agreement reached on how to proceed before work commences.</b>	

# Energy Saving Group

## Air Source Heat Pump Pre-Installation Building Inspection Form

Carbon Monoxide and other Safety Alarms		
Where carbon monoxide (CO) or other safety alarms have already been installed at the designated location, the building inspector should enquire of the customer whether or not they have been tested in accordance with the alarm system design specification and/or the manufacturer's instructions.		
Location:	Type of Alarm:	Test Result:

Customer Understanding of the Extent of the Works	
Does the customer understand the nature and extent of the work?	YES
Have they been made aware of any disruption that may be caused (for example rubbish disposal and the siting of skips)	YES
Does the customer have any particular requests or requirements?	NO
Are the arrangements for site access and the storage of installation materials adequate and appropriate?	YES
Is there any other information which would help ensure the smooth running of the installation process?	NO
This building inspection and its findings, including those relating to the suitability and completeness of the installation method statement, the EEM specification and any customer-related issues, shall be made by the building inspector and retained by the installer, with a copy being made available to the EEM specifier.	
Customer Sign Off	
By signing the below, you agree to the following statements: <ul style="list-style-type: none"><li>We have explained and you are aware of the nature and extent of the installation and this meets your expectations</li><li>The Arrangements we have made for site access and installation materials storage are adequate and appropriate for the installation to be undertaken.</li></ul>	
Signature	
Date	

Building inspection carried out by:

Signed:

Date:

**SPV**

**PIBI**

# Energy Saving Group

## Solar Photo Voltaic Panels Pre-Installation Building Inspection Form

Customer Information	
Contact Name:	
Address:	
Telephone:	
Email:	
Project Details	
Specifiers Contact Details:	Energy Saving Group Ltd Mclaren, 46 The Priory Queensway, Birmingham, B4 7LR
Product Type:	Solar Photo Voltaic Panels

General	
Is there any potential for moisture build up as a result of the installation?	NO
Will the functionality and/or safety of installed services (gas, electricity, water, telecommunications etc.) be affected in any way as a result of the installation?	NO
Is there any potential risk in relation to the ongoing performance of installed services? (If YES liaison with measure specifiers and/or service providers will need to take place).	NO
<b>This Building Inspection must be carried out in conjunction with the full Design Specification and the prepared Method Statement.</b>	
From the findings of this building inspection, is the installation able to be carried out in line with the full Design Specification?	YES
From the findings of this building inspection, is the Method Statement suitable and complete?	YES
Is there any evidence that any form of protected species would be disturbed by the installation process?	NO
<b>NOTE: Any changes needing to be made or problems encountered as a result of this building inspection are required to be discussed with the specifier and/or customer as appropriate and agreement reached on how to proceed before work commences.</b>	

# Energy Saving Group

## Solar Photo Voltaic Panels Pre-Installation Building Inspection Form

Carbon Monoxide and other Safety Alarms		
Where carbon monoxide (CO) or other safety alarms have already been installed at the designated location, the building inspector should enquire of the customer whether or not they have been tested in accordance with the alarm system design specification and/or the manufacturer's instructions.		
Location:	Type of Alarm:	Test Result:

Customer Understanding of the Extent of the Works	
Does the customer understand the nature and extent of the work?	YES
Have they been made aware of any disruption that may be caused (for example rubbish disposal and the siting of skips)	YES
Does the customer have any particular requests or requirements?	NO
Are the arrangements for site access and the storage of installation materials adequate and appropriate?	YES
Is there any other information which would help ensure the smooth running of the installation process?	NO
This building inspection and its findings, including those relating to the suitability and completeness of the installation method statement, the EEM specification and any customer-related issues, shall be made by the building inspector and retained by the installer, with a copy being made available to the EEM specifier.	
Customer Sign Off	
By signing the below, you agree to the following statements: <ul style="list-style-type: none"><li>We have explained and you are aware of the nature and extent of the installation and this meets your expectations</li><li>The Arrangements we have made for site access and installation materials storage are adequate and appropriate for the installation to be undertaken.</li></ul>	
Signature	
Date	

Building inspection carried out by:

Signed:

Date:



# **CUSTOMER FEEDBACK FORM**



**Energy Saving Group Ltd** aims to ensure customer satisfaction by producing work to the highest standard and ensuring the highest level of service and assistance. To aid in the continual improvement of our services we encourage our customers to a few moments to fill out this customer feedback form. All feedback is appreciated, and any concerns or suggestions are taken seriously to ensure we continue to improve on and exceed customer expectations.

Once complete please hand this form back to the lead installer. If received online via email, please email the filled-out form back to [jaderetrofit@gmail.com](mailto:jaderetrofit@gmail.com).

---

**Customer Name:****Customer Address:****Customer Telephone:****Customer Email Address:**

How would you rate the following:

*(Please circle your answers)*

1. Initial Enquiry

Excellent

Good

Moderate

Poor

**Comments**

2. Assessment

Excellent

Good

Moderate

Poor

**Comments**

3. Handling of your Personal Data

Excellent

Good

Moderate

Poor

**Comments**

4. Site Survey

Excellent

Good

Moderate

Poor

**Comments**

5. Installation

Excellent

Good

Moderate

Poor

**Comments**

## Customer Feedback Form

### 6. Standard of the work

Excellent

Good

Moderate

Poor

*Comments*

### 7. Aftercare

Excellent

Good

Moderate

Poor

*Comments*

### 8. Health and Safety

Excellent

Good

Moderate

Poor

*Comments*

### 9. Our Company

Excellent

Good

Moderate

Poor

*Comments*

10. On a scale of 1 to 10, with 1 being poor and 10 being excellent how would you rate overall the installation of the measure(s) by our company Energy Saving Group Ltd.

1

2

3

4

5

6

7

8

9

10

11. Would you be happy to be used as a testimonial for other potential customers?

1

2

3

4

5

6

7

8

9

10

Do you have any comments or feedback on any aspect of the work or service we have provided to you including any improvements that could be made?

---

Signed by the Customer:

Signed by the Retrofit Coordinator

Date: \_\_\_\_\_

**Energy Saving Group Ltd**

(Company Registration Number: 11514788)

**Registered Office Address:**

McLaren  
46 The Priory  
Birmingham  
B4 7LR

Email:

# **RISK ASSESSMENT**

**Risk assessment table for determining PAS 2035 Path**

This form is to be used in connection with our **GDPP072a -Risk Assessment Procedure**.

**The retrofit risk assessment shall use data from a “triage” process (which does not require nor preclude a visit to the dwelling) and apply the criteria set out in Annex B of PAS2035:2019.**

This consists of the assessment of risk grades for each of five criteria and their aggregation into an overall risk grade that is used to determine the relevant compliance path.

Customer	Property Details
Retrofit Assessor	Details
	The Retrofit Assessor for this project is qualified after completing their Retrofit Assessor training with Elmhurst Energy.
Assessment Path	Outcome of the retrofit risk assessment based on aggregate risk grade
B	As the risk path has been assessed at B, the path B requirements apply
Data obtained from a “triage” process	How was data obtained?
	Visit to site and telephone enquiries with the Customer. Existing EPC Google Earth Measures Interaction Matrix Retrofit Installer
Confirmation	The Retrofit Coordinator shall request confirmation from the Retrofit Designer that the information included in the Risk Assessment Report is sufficient for the preparation of a retrofit design in accordance with Clause 9 of PAS2035:2019 and that there is no missing information. (NB: If any missing information is identified then the Retrofit Coordinator shall arrange for the Retrofit Assessor to collate and include in an updated assessment report.
	The assessment report is sufficient. No circumstances have changed during the retrofit project in a way that would affect the outcome of the risk assessment and so no repeat of the risk assessment is required. – Retrofit Coordinator and Retrofit Designer Date:

**Criterion 1: Number of dwellings in the project**

The number of dwellings to be improved	Risk grade	Assessed grade	
1-10	A	A	
11-30	B		
More than 30	C		

**Criterion 2: Number of measures per dwelling A)**

The average number of improvement measures per dwelling	Risk grade	Assessed grade	
1-2	A		
3-5	B		
More than 5	C		

**Criterion 3: Measures proposed**

The inherent technical risk (IHT) of the highest risk measure (from Table B.2) of PAS2035	Risk grade	Assessed grade	
1	A		
2	B	B	B-TAKEN FROM TABLE B.2
3	B		

**Criterion 4: Combination of measures**

The highest risk combination of measures (from the Measures Interaction Matrix, Figure D.1)	Risk grade		
GREEN	A		
YELLOW	B		

ORANGE	B		
Criterion 5: Construction and Built Form			
Construction and built form of buildings	Risk grade	Assessed grade	
Conventional B), not high-rise, not protected C)	A		
Traditional D), not protected C)	B		
System-built E), not high-rise, not protected C)	B		
High rise F), any construction	C		
Protected C), any construction or built form	C		
Overall Risk Grade			
Highest assessed grade (from Criteria 1 to 5 above)	PAS 2035 Path	Assessed grade	
A	A		
B	B	B	B
C	C		

- A) For this risk assessment, the number of measures excluding any ventilation upgrade required by Annex C.
- B) Conventional means masonry cavity wall construction (brick and/or block) with or without render, tile hanging or other external cladding.
- C) For the purpose of this PAS, protected buildings include Listed Buildings and buildings in Conservation Areas or World Heritage Sites.
- D) Traditional means constructed with solid brick or stone walls, or timber-framed walls with any infill.
- E) System-built means frame (timber, steel or concrete) and pre-fabricated panel (concrete or timber, or a combination) construction, or timber-framed construction with brick or stone external cladding.
- F) High-rise means over 12 metres or over four storeys in height above the ground.



***B.2 Note: Where the intended Retrofit Installer operates under an industry quality assurance scheme that has the features listed in B.6, the inherent technical risk scores for the measure(s) covered by that scheme in Table B.2 may be reduced by one.***

***B.3 Where a measure complies with the MCS standards, (N&), (N8) and is installed by an MCS certified installer the inherent technical risk score for that measure in Table B.2 may be reduced by one.***

***B.4 For the installation of external solid wall insulation (EWI), if the construction details in the NIA/INCA/SWIGA guide "External wall insulation specification for weathering and thermal bridge control" (11) are not used, or the details coded amber are used (rather than those coded green), the inherent technical risk score for the relevant measure in Table B.2 shall be increased by one.***

***B.5 Any industry quality assurance scheme used to claim a reduction of inherent technical risk as referred to in B.2, shall apply only to measures that are proprietary systems (not individual materials and components) and shall have at least the characteristics set out in B.6.***

***B.6 The industry quality assurance scheme shall:***

- 1) be operated by a body independent of the system provider and the installer (referred to here as the scheme operator);***
- 2) subject system providers to initial and regular assessments of their technical and financial resources and documented management systems;***
- 3) include provision for the imposition of sanctions (including possible removal from the scheme) on members who do not comply with the scheme rules;***
- 4) require maintenance by the scheme operator of expertise to investigate complaints and assist with their resolution;***
- 5) require that:***
  - \* systems and their components are subject to independent technical approval by a UKAS accredited body;***
  - \* the UKAS accredited body carries out independent checks of manufacturing activity at least annually;***
  - \* any equipment used to install a system is tested, calibrated and plated for the system;***
  - \* procedures are in place to ensure that only installers approved by the system providers can purchase or install their systems;***
  - \* materials and components for systems are appropriately sorted and handled, and traceable via an audit process;***
  - \* systems' documentation includes generic method statements for their correct installation;***

- \* *systems are covered by independent guarantees of the materials and products used, and of any designs prepared by system providers; and*
- \* *system providers hold appropriate professional indemnity assurance;*
- 6) *require independent checks of compliance with any requirements for independent surveillance of pre-installation inspections;*
- 7) *provide for random targeted quality inspections by the scheme operator of installations at a rate of not less than 1% of installations by each scheme member;*
- 8) *require system providers to:*
  - Train installers of their systems;*
  - Assess installers/ qualifications and competence;*
  - Issue system-specific "competence cards" to qualified and competent operatives;*
  - Provide qualified and competent operatives with CPD; and*
  - Re-assess competence at least bi-annually, and maintain records of their training and CPD.*
- 9) *require system providers to make comprehensive good practice guidance available in relation to their systems, covering:*
  - Assessment for suitability;*
  - Installation;*
  - Dealing with non-standard installations;*
  - Guidance on handover to users;*
  - Guidance for users;*
  - Complaint handling; and*
  - Remedial procedures*
- 10) *Require system providers to make available regularly updated technical notes to advise installers of trends, identified technical issues, system changes or changes to installation procedures or requirements for qualifications and competence;*
- 11) *Subject installers of systems to regular random quality inspections by the scheme operators, at a rate not less than 1% of all installations; these inspections shall be additional to any certification body surveillance and shall focus on system-specific performance and quality;*
- 12) *Require installers of systems to provide the scheme operator with evidence of compliance with the Building Regulations 2010 (22) through membership of a Competent Persons Scheme (where applicable), and of certification under PAS2030:2019.*

- 13) Require installers to provide independent guarantees of their work covering pre-installation inspections, any designs they prepare, and installation workmanship;**
- 14) Require installers to operate complaints handling procedures and to provide customers with access to alternative dispute resolution; and**
- 15) Require installers' complaint handling procedures to be audited annually by the scheme operator.**

### PAS 2035 Ventilation

**"No Insulation without ventilation!"**

#### Assessment

**Existing ventilation is inadequate if**

- Evidence of condensation or mould
- No working ventilation system present
- IEV or PSV present but incomplete (including air inlets)
- Good IEV or PSV but intended/potential Q50 < 5m<sup>3</sup>/m<sup>2</sup>h

#### Upgrade

**If existing ventilation is inadequate then**

- If intended Q50 > 5m<sup>3</sup>/m<sup>2</sup>h then install IEV or PSV
- If intended Q50 < 5m<sup>3</sup>/m<sup>2</sup>h then install MEV or MVHR
- System capacity must be based on full occupancy

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## Intended Outcomes GDPF96

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**Retrofit Coordinator:**

**Retrofit Installer:**

**TrustMark License Number:** 1760647

Version No. 1 Revision 0	Ref.: FRM-NIH-ECO-GDPF96	Rev. Issue Date: 1 <sup>st</sup> January 2021	Controller: SHEQ
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**The number of dwellings to be improved**

One dwelling to be improved.

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Reductions in energy costs and/or alleviation of fuel poverty	
Reductions in emissions associated with energy use	
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Version No. 1 Revision 0	Ref.: FRM-NIH-ECO-GDPF96	Rev. Issue Date: 1 <sup>st</sup> January 2021	Controller: SHEQ
Uncontrolled if Copied			Page 2 of 4

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Improving resistance to water penetration and resilience against flood risk	
Protection or enhancement of architectural heritage	
Integration of energy efficiency measures with other improvements, e.g. extension, loft conversion or general refurbishment	
Any other issues that might be considered relevant	

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Our signature:

Your name:

Our name: Jade Lindo – Retrofit Coordinator

Date of signature:

Date of signature:

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Uncontrolled if Copied			Page 3 of 4

## Intended Outcomes

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Uncontrolled if Copied			Page 4 of 4



INTENDED  
OUTCOMES  
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Uncontrolled if Copied			Page 1 of 4

 <b>ENERGY SAVING GROUP</b> <small>For a better tomorrow save energy today</small>	<b>Intended Outcomes</b> <b>GDPF96</b>
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Version No. 1 Revision 0	Ref.: FRM-NIH-ECO-GDPF96	Rev. Issue Date: 1 <sup>st</sup> January 2021	Controller: SHEQ
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## Intended Outcomes

### GDPF96

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Uncontrolled if Copied			Page 3 of 4

## Intended Outcomes

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Uncontrolled if Copied			Page 4 of 4

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Uncontrolled if Copied			Page 1 of 4

 <b>ENERGY SAVING GROUP</b> <small>For a better tomorrow save energy today</small>	<b>Intended Outcomes</b> <b>GDPF96</b>
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Version No. 1 Revision 0	Ref.: FRM-NIH-ECO-GDPF96	Rev. Issue Date: 1 <sup>st</sup> January 2021	Controller: SHEQ
Uncontrolled if Copied			Page 2 of 4



 <b>ENERGY SAVING GROUP</b> <small>For a better tomorrow save energy today</small>	<b>Intended Outcomes</b> <b>GDPF96</b>
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Uncontrolled if Copied			Page 4 of 4

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Uncontrolled if Copied			Page 1 of 4

 <b>ENERGY SAVING GROUP</b> <small>For a better tomorrow save energy today</small>	<b>Intended Outcomes</b> <b>GDPF96</b>
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Uncontrolled if Copied			Page 2 of 4

 <b>ENERGY SAVING GROUP</b> <small>For a better tomorrow save energy today</small>	<b>Intended Outcomes</b> <b>GDPF96</b>
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Uncontrolled if Copied			Page 3 of 4

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Uncontrolled if Copied			Page 4 of 4

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 <b>ENERGY SAVING GROUP</b> <small>For a better tomorrow save energy today</small>	<b>Intended Outcomes</b> <b>GDPF96</b>
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Uncontrolled if Copied			Page 3 of 4

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Uncontrolled if Copied			Page 4 of 4

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**Retrofit Installer:**

**TrustMark License Number:** 1760647

Version No. 1 Revision 0	Ref.: FRM-NIH-ECO-GDPF96	Rev. Issue Date: 1 <sup>st</sup> January 2021	Controller: SHEQ
Uncontrolled if Copied			Page 1 of 4

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**The number of dwellings to be improved**

One dwelling to be improved.

**Initial Condition of the Building**

**Current use of the building**

This property is a domestic property currently occupied by the typical number of people for this property, refer to Occupancy Assessment

**Future use of the building**

This property is a domestic property currently occupied by the typical number of people for this property, refer to Occupancy Assessment

**Intended outcomes**

You, the client, have highlighted the following as the intended outcomes of the retrofit project:

Reductions in energy use:	
Reductions in energy costs and/or alleviation of fuel poverty	
Reductions in emissions associated with energy use	
Improvement in internal comfort	
Improvement of Indoor Air Quality (IAQ)	
Elimination of condensation, damp and mould	

Version No. 1 Revision 0	Ref.: FRM-NIH-ECO-GDPF96	Rev. Issue Date: 1 <sup>st</sup> January 2021	Controller: SHEQ
Uncontrolled if Copied			Page 2 of 4

 <b>ENERGY SAVING GROUP</b> <small>For a better tomorrow save energy today</small>	<b>Intended Outcomes</b> <b>GDPF96</b>
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Reducing the risk of overheating	
Improvement in energy rating (e.g. SAP);	
Meeting a performance standard (e.g. NZEB or Passive House EnerPHit)	
Improving the usefulness or sustainability of the building	
Protecting the building against decay or deterioration	
Improving resistance to water penetration and resilience against flood risk	
Protection or enhancement of architectural heritage	
Integration of energy efficiency measures with other improvements, e.g. extension, loft conversion or general refurbishment	
Any other issues that might be considered relevant	

Your signature(s):	Our signature:
Your name:	Our name: Jade Lindo – Retrofit Coordinator
Date of signature:	Date of signature:



## Intended Outcomes GDPF96

Version Number	Amendment	Date
1.0	New document	1 <sup>st</sup> January 2021

Version No. 1 Revision 0	Ref.: FRM-NIH-ECO-GDPF96	Rev. Issue Date: 1 <sup>st</sup> January 2021	Controller: SHEQ
Uncontrolled if Copied			Page 4 of 4

INTENDED  
OUTCOMES  
FOR

This document is an agreement with the client/occupier for any remedial and retrofit works and sets out at the outset of the project the **Intended Outcomes** of the project taking into account the initial condition of the building(s). You should read this carefully, as well as any other documents that we have given you before signing and entering into a contract with us including the **Key Contract – Off Premises** and the **Customer Introduction Letter**.

**We are:** Energy Saving Group Ltd  
 McLaren Building  
 46 The Priory Queensway  
 Birmingham  
 B4 7LR  
 Email: [info@energysavinggroup.net](mailto:info@energysavinggroup.net).

**You are:**

Tel: +44 (0) 203 797 6332.

Registered in England and Wales with company number 11514788

**Retrofit Coordinator:**

**Retrofit Installer:**

**TrustMark License Number:** 1760647

Version No. 1 Revision 0	Ref.: FRM-NIH-ECO-GDPF96	Rev. Issue Date: 1 <sup>st</sup> January 2021	Controller: SHEQ
Uncontrolled if Copied			Page 1 of 4

 <b>ENERGY SAVING GROUP</b> <small>For a better tomorrow save energy today</small>	<b>Intended Outcomes</b> <b>GDPF96</b>
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Version No. 1 Revision 0	Ref.: FRM-NIH-ECO-GDPF96	Rev. Issue Date: 1 <sup>st</sup> January 2021	Controller: SHEQ
Uncontrolled if Copied			Page 2 of 4

 <b>ENERGY SAVING GROUP</b> <small>For a better tomorrow save energy today</small>	<b>Intended Outcomes</b> <b>GDPF96</b>
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Your signature(s):	Our signature:
Your name:	Our name: Jade Lindo – Retrofit Coordinator
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## Intended Outcomes

### GDPF96

Version Number	Amendment	Date
1.0	New document	1 <sup>st</sup> January 2021

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Uncontrolled if Copied			Page 4 of 4

# MINOR ELECTRICAL INSTALLATION WORKS CERTIFICATE

Issued in accordance with BS 7671: 2018 – Requirements for Electrical Installations  
To be used only for minor work which does not include the provision of a new circuit

## PART 1 : DETAILS OF THE CONTRACTOR, CLIENT AND INSTALLATION

DETAILS OF THE CONTRACTOR	DETAILS OF THE CLIENT	DETAILS OF THE INSTALLATION
Registration No: 1142086	Contractor Reference Number (CRN): N/A	Occupier:
Trading Title: WAQAR SHAH	Name: McLaren building energy saving group	Address:
Address: 13 BEDFORD ROAD, WEST BROMWICH	Address: The McLaren Building, 46 The Priory Queensway, BIRMINGHAM	
Postcode: B71 2RS Tel No: 07482394766	Postcode: B4 7LR Tel No: 02037976332	Postcode: Tel No:

## PART 2 : DETAILS OF THE MINOR WORKS, SUPPLY CHARACTERISTICS AND EARTHING ARRANGEMENTS

Description of Minor Works: Date completed:

System type and earthing arrangements: (e.g. TN-C-S / TN-S / TT) TN-S  $Z_s$  at Distribution Board / Consumer Unit supplying the final circuit: 0.25  $\Omega$

Presence of adequate main protective conductors: Earthing conductor (✓) Protective bonding conductor(s) to: Water (N/A) Gas (✓) Oil (N/A) Other (state) N/A

Comments on existing installation (see Reg 644.1.2): Page No (N/A) Departures from BS 7671: 2018 (X) No If 'yes' details on Page No (N/A)

## PART 3 : CIRCUIT DETAILS

Circuit: Description and Ref No	DB/CU: Ref No	Location and type
Overcurrent protection device: BS EN 60898 Type B	Rating 16 (A)	Csa of conductors: Live 2.5 mm <sup>2</sup> cpc 2.5 mm <sup>2</sup>

## PART 4 : TEST RESULTS FOR THE CIRCUIT ALTERED OR EXTENDED (where relevant and practicable)

Continuity	Protective conductor ( $R_1 + R_2$ ): 0.11 $\Omega$	or $R_2$ : (N/A) $\Omega$
Ring final circuit (loop values)	L/L: (N/A) $\Omega$	N/N: (N/A) $\Omega$ cpc/cpc: (N/A) $\Omega$
Insulation Resistance*	L/L: (999) M $\Omega$	L/E: (999) M $\Omega$ Test Voltage: (500) V DC
Polarity	Satisfactory: (✓)	Earth fault loop impedance $Z_s$ (N/A) $\Omega$
RCD operation	Rated residual operating current: (30) mA	Measured operating time: (N/A) ms
Functional tests	RCD: (✓)	AFDD: (N/A)
Test Instrument (insert appropriate serial numbers)	Multifunction: (1009986101805797)	Other (state): N/A
	(N/A)	(N/A)

## PART 5 : DECLARATION

I CERTIFY that the work covered by this certificate does not impair the safety of the existing installation and that the work has been designed, constructed, inspected and tested in accordance with BS 7671: 2018, amended to (date) 2020 and that to the best of my knowledge and belief, at the time of my inspection, complied with BS 7671: 2018 except as detailed in PART 2 of this certificate.

Name (capitals): WAQAR SHAH	Signature:
Position: QS	Date:
The results of the inspection and testing reviewed by the Qualified Supervisor	
Name (capitals): WAQAR SHAH	Signature:
Position: QS	Date:

\*Where an agreed limitation is used provide details on a separate page and append to the certificate.

# NOTES FOR RECIPIENT

**THIS SAFETY CERTIFICATE IS AN IMPORTANT AND VALUABLE DOCUMENT WHICH SHOULD BE RETAINED FOR FUTURE REFERENCE**

If you were the person ordering the work, but not the owner or user of the installation, you should pass this certificate, or a full copy of it, immediately to the owner or user of the installation.

This safety certificate has been issued to confirm that the minor electrical installation work to which it relates has been designed, constructed, inspected, tested and verified in accordance with the national standard for the safety of electrical installations, *BS 7671: 2018 - Requirements for Electrical Installations*.

Where the installation incorporates a residual current device (RCD) there should be a notice at or near the device stating that it should be tested every six months. For safety reasons it is important that this instruction is followed.

Also for safety reasons, the complete electrical installation including the minor electrical installation works which is the subject of this certificate will need to be inspected and tested at appropriate intervals by a skilled person or persons, competent in such work. **NICEIC\* recommends that you engage the services of an NICEIC Approved Contractor for this purpose. There should be a notice at or near the origin of the existing installation (such as at the consumer unit or main switchboard) indicating the date when the next inspection is due.**

Only the NICEIC Domestic Installer (contractor) responsible for the work is authorised to issue this NICEIC certificate. The certificate has a printed serial number which is traceable to the contractor to which it was supplied.

The Minor Electrical Installation Works Certificate is intended to be used only for an addition or alteration to an existing circuit that does not extend to the provision of a new circuit. Examples include the addition of a socket-outlet or a lighting point to an existing circuit, or the replacement or relocation of a light switch. This certificate may also be used for the replacement of equipment such as accessories or luminaires, but not for the replacement of distribution boards, consumer units or similar items. This certificate would be considered by NICEIC to be invalid if you requested the contractor to undertake more extensive work, for which an Electrical Installation Certificate or Domestic Electrical Installation Certificate should have been issued. A separate certificate should have been received for each existing circuit on which minor works has been carried out.

You should have received the certificate marked 'Original' and the contractor should have retained the certificate marked 'Duplicate'.

**The 'Original' certificate should be retained in a safe place and shown to any person inspecting, or undertaking further work on the electrical installation in the future. If you later vacate the property, this certificate will demonstrate to the new user that the minor electrical installation works complied with the requirements of BS 7671 at the time the certificate was issued.**

PART 4 of the certificate is intended to facilitate the recording of information associated with the testing of the modified circuit, and the related parts of the existing installation on which the modified circuit depends for its safety. Generally, each field should have been completed to confirm the results of a particular test by insertion of a measured value or a '✓'. Where a particular test was not relevant this should have been indicated by 'N/A', meaning 'Not Applicable'.

If wiring additions or alterations are made to an installation such that wiring colours to older versions of *BS 7671* exist, a warning notice should have been affixed at or near the appropriate consumer unit/distribution board.

Should the person ordering the work (e.g. the client, as identified on this certificate), have reason to believe that any element of the work for which the contractor has accepted responsibility (as indicated by the signature on this certificate) does not comply with the requirements of *BS 7671*, the client should in the first instance raise the specific concerns in writing with the contractor. If the concerns remain unresolved, the client may make a formal complaint to NICEIC, for which purpose a standard complaint form is available on request.

The complaints procedure offered by NICEIC is subject to certain terms and conditions, full details of which are available upon application. NICEIC does not investigate complaints relating to the operational performance of electrical installations (such as lighting levels), or to contractual or commercial issues (such as time or cost).

*\* NICEIC is operated by Certsure LLP, a partnership between the Electrical Contractors' Association and the charity, Electrical Safety First. NICEIC maintains and publishes registers of electrical contractors that it has assessed against particular scheme requirements (including the technical standard of electrical work).*

For further information about electrical safety and how NICEIC can help you, visit **[www.niceic.com](http://www.niceic.com)**