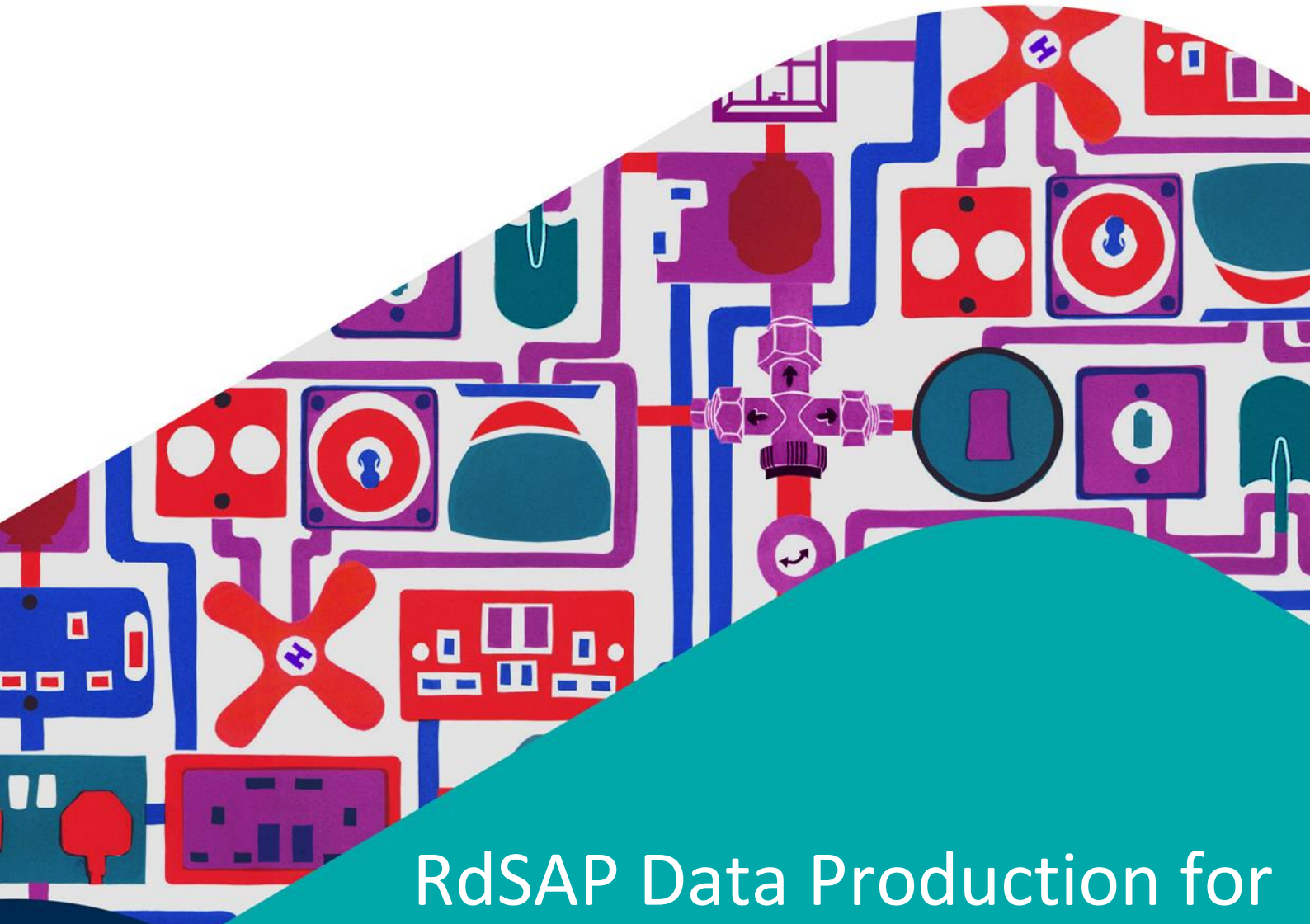




TRUSTMARK
Government Endorsed Quality



RdSAP Data Production for Retrofit Projects

V1.1 – 04/09/2022
trustmark.org.uk

Context

Following consultation with all PAS2035 Scheme Providers, a process has been agreed to maintain a clear divide between **Reduced Data Standard Assessment Procedure** surveys (RdSAP) conducted for PAS2035 Retrofit Assessments and RdSAP surveys conducted to produce an EPC.

This process currently applies to Retrofit Projects lodged within the TrustMark Retrofit Portal for **EC04/Great British Insulation Scheme Only**.

This approach will likely be adopted for all RdSAP data lodged into the TrustMark Retrofit Portal using the Retrofit Portal.

The following text was agreed by all PAS2035 Scheme Providers and TrustMark:

Start of the agreed process:

Obtain evidence from the property owner that they consent to their data (including RdSAP data) being shared with relevant stakeholders and lodged into TrustMark (TM) Retrofit Portal (RFP). This is already a requirement.

1st Site visit by Retrofit Assessor (RA):

- 1) Collects Retrofit Assessment data, e.g. RdSAP data, Condition, Ventilation, Occupancy Information, etc. to fulfil the function of a Retrofit Assessment under PAS2035
- 2) Using RdSAP data, they create an Energy Report/Energy Performance Report.*
- 3) This is then lodged onto the TM DW.

* EPRs are subject to different data sharing restrictions between Scheme Providers and TrustMark compared with EPCs.

If an Energy Performance Certificate (EPC) is required, e.g., by the property owner, then as a separate exercise – the Domestic Energy Assessor (who may be the same RA)

- 1) creates a second data set of RdSAP data for the production of the EPC (which cannot be shared)
- 2) This data is lodged in the National EPC Registers (E&W or Scotland)
- 3) None of this data is shared with TM

Post Installation Assessment:

- The evidence of the installation measure(s) is passed through the appropriate PAS2035 process, e.g. given back to the Retrofit Coordinator (RC)
- The RC provides all the information to the original RA* (installation of any new ECO measures and also any known changes to the home)
- The RA creates the post-installation RdSAP XML data that is lodged into the TM DW
- This post-installation RdSAP assessment should ideally be carried out within six months of the original site visit by the RA
- Note this post-installation assessment is not a full Retrofit Assessment and is not lodged as such

- However, if any RA or RC are not fully satisfied with data supplied to them, they may choose to [revisit / instruct a revisit to] the home to ensure the accuracy of the post-installation RdSAP assessment (e.g. where less than 100% of a measure has been installed).

*If the original RA is not available for any reason, then the RC may pass all the details (original RdSAP assessment data and site notes, with the post-installation details) to another qualified RA who is registered with the same TrustMark Scheme Provider as the original RA, the new RA can then create the post-installation RdSAP data without the need for a site visit.

Outside of ECO4/Great British Insulation Scheme:

If a post-installation EPC is required, then another site visit MUST be undertaken by an accredited DEA, and none of this data is shared.

End of an agreed process

Further notes

For any other questions, please refer to the TrustMark website;

<https://www.trustmark.org.uk/tradespeople/eco4>.