

TrustMark Registered Retrofit Coordinators Data Warehouse Document Lodgement Guide

Purpose

This guidance document has been produced to support understanding of the requirements of a Retrofit Coordinator where direct lodgement to the TrustMark Data Warehouse is required. It is not designed to replace any regulatory, industry obligations or PAS 2035:2019.

It is intended to be used as a guide by a qualified Retrofit Coordinator and in conjunction with PAS 2035:2019 but may support others in their wider understanding of the requirements.

Where the TrustMark compliance process identifies that a lodgement is incomplete or non-compliant it may be rejected without refund of any lodgement fee.

Introduction

Under the requirements for ECO3 and TrustMark, when Retrofit Installers become certificated to PAS 2030:2019 they must also be compliant with PAS 2035:2019.

Every domestic retrofit project compliant with PAS 2035:2019 shall be managed by a Retrofit Coordinator in accordance with PAS 2035:2019.

The Retrofit Coordinator is responsible for claiming conformance to PAS 2035:2019 and uploading the required documentation to the Data Warehouse and submitting the lodgement. Should a Retrofit Coordinator have doubt of the process you are advised to seek guidance from the sources identified via the TrustMark Website and/or use the following links:

Link	Description
TrustMark Portals	TrustMark Registered Businesses can access the Data Warehouse from within their Business Portal
Data Dictionary	Our Data Dictionary contains details on the information required to lodge data in the Data Warehouse
Data Warehouse Lodgement FAQs	This is where you will find answers to frequently asked questions relating to the Data Warehouse and Lodgement
Inside the Data Warehouse	A document to allow you to become familiar with the process of lodgement
PAS 2035:2019	This is where you can find general information relating to PAS 2035:2019
TrustMark, ECO and PAS Relationships	This is where you can find information to understand more about how TrustMark, ECO and PAS 2030 and PAS 2035 relate to each other
The Framework Operating Requirements - Version 2.0	This is where you can find the Trustmark Framework Operating Requirements and other associated documentation
BSI Shop	Online shop for Standards & PAS documents

Lodgement

The following diagram summarises the documents required when a Retrofit Coordinator is making a direct lodgement into the Data Warehouse:

Required documents							Role					
Id	Required for Work Type				Title	# of documents	Advisor	Assessor	Designer	Retrofit Coordinator	Installer	Evaluator
	RMI	Other EEMs	PAS2030	PAS2035 clause								
1					Advice report	0+	Y			Y		
2				[7.1]	Risk Assessment	1+		Y		Y		
3				[6.2]	Intended Outcomes	1				Y		
4				[8]	Assessment Report	1+		Y		Y		
5				[9]	Retrofit Design	1+			Y	Y		
6				[9.2.2]	Improvement Option Evaluation	1				Y		
7				[9.2.10]	Medium Term Low Carbon Plan	1				Y		
8				[12.1]	Handover documents for Client	1+				Y		
9			Y	[11.3]	Claim of Compliance PAS2030	1+				Y	Y	
10				[6.1.4]	Claim of Compliance PAS2035	1				Y		
11				[14]	Monitoring and Evaluation outcomes	1+				Y		Y
12	o	o	Y	[12.1.2]	Guarantee	1+				Y	Y	
13	o	o			Other commissioning certificates	1+				Y	Y	
14	o	o	o	o	Other	1+	Y	Y	Y	Y	Y	Y
15	o	o	o	o	Contract / Invoice	1+				Y		

denotes

- Mandatory
- Mandatory can be part of Assessment
- Non-Mandatory

Y

denotes participant

o

uploaded if exists

The following information relates to Mandatory required documents and is intended to be supportive of the process of direct lodgement by a Retrofit Coordinator and the primary source of reference remains as PAS 2035:2019: **No practicing Coordinator should be without this.**

[7.1] Risk Assessment; is the management and capture of technical and procedural risks by the collation of data from a “triage” process to determine the risk pathway using the inherent technical risks criteria in PAS 2035:2019 Section 7 and Annex B.

[6.2] Intended Outcomes; is a comprehensive documented agreement with the client/occupier for any remedial and retrofit works. They consider the initial condition of the building, its current and future use, protection and improvement as per PAS 2035:2019 Section 6.

[8] Assessment Report; is a report that captures a whole dwelling assessment (based on the risk assessment pathway above) of its heritage, architectural features, structure, construction, condition and services. It must include enough images and detail to determine its suitability for improvement. as per PAS 2035:2019 Section 8 and a simplified version of the BS 7913 significance assessment.

[9] Retrofit Design; is a design that meets the requirements of PAS 2035:2019 Section 9 along with the supporting information and specification as detailed within the improvement plan. It should identify any ventilation improvements required and the order in which the measures should be installed. They should also incorporate specific details of products, interfaces and how they are to be installed. The Retrofit Designers’ competency should also be included as per PAS 2035:19 Annex A.

[12.1] Handover Documents for Client; includes maintenance, warranty and user information which requires to be explained and supplied to the client/occupier as per PAS 2035:2019 section 12.

[11.3] Claim of Compliance PAS 2030; is the responsibility of and supplied by a qualified and certificated Retrofit Installer.

[6.1.4] Claim of compliance PAS 2035; is currently a self-assessment methodology as per PAS 2035:2019 Section 15. The Retrofit Coordinator claims overall compliance for the retrofit project by managing all the retrofit participants and their evidence to protect both the client’s and the public interest.

[12.1.2] Guarantee; (not withstanding any regulatory and/or scheme requirements) is any specific warranty / guarantee document(s), also to include within the handover pack. PAS 2035:2019 Section 12.