

Technical Bulletin : October 2021 Information for Retrofit Assessors



For this technical bulletin, we will be reviewing some of the basics of being a domestic energy assessor. In recent months, we have noticed, from auditor feedback, answering your technical support queries, and reviewing the reasons given for appeal, that there are some things that people have seemingly forgotten.

Licence Keys & Lodgement References

The Quidos RFA software has been updated to ensure that the licence key and lodgement reference fields are mandatory. So, what are these fields?

Licence Key

This is your Trustmark Licence Number and needed to ensure that you are TrustMark registered. You can find your licence key when logged in to Trustmark

Licence Number: 2366016

Licensed Trades:

Retrofit Assessor

Trustmark Lodgement Reference

This is the lodgement ID a Retrofit Assessor receives when a job is assigned to them from a Coordinator.

When the Retrofit Coordinator begins the project, they will be in contact with the Retrofit Assessor to join the project, and update the Assessor details to either lodgement.

The Retrofit Assessor will receive an email from Trustmark providing details of the project and the lodgement reference:

Public Message > Assignment to PAS 2035 retrofit work

To: [REDACTED]
From: nonreply@trustmark.org
Sending IP: 149.72.209.189
Received: 2021-09-14 14:16:08

HTML TEXT JSON RAW LINKS ATTACHMENTS

Dear TrustMark_All_Trades_Test_Only,

[REDACTED] has assigned you as the Retrofit Assessor role and invited you to participate in the retrofit activity at 33 High Street, [REDACTED]

Lodgement ID: 0edee5c7-16e2-44d1-a31e-7c733763ef7b

Please visit <https://trustmark.org.uk/login> to login to your TrustMark portal and follow the link to the Data Warehouse to view the details and contribute to this work.

If you are TrustMark Registered and have not yet claimed your TrustMark portal, please do so [here](#).

For help with any aspect of lodgement, or the Data Warehouse, please visit the [Data Warehouse Help and Support](#) page.

Kind Regards,
The TrustMark Team

In this instance, the lodgement ID would be:

0edee5c7-16e2-44d1-a31e-7c733763ef7b

It is crucial that this lodgement ID is correct for the lodgement process. It gives a clear link to the Retrofit project within the TrustMark Data Warehouse so that all the correct information for your clients is in one location and attached to the appropriate Coordinator.

Quality of Condition Reports

Based on the first Retrofit Assessment audits that have been completed, we have noted that there are issues with the quality of the information that Assessors are including in their condition reports. The clarity, depth and quality of the information provided in this document is vitally important for the Coordinator to be able to understand the dwelling without the need to visit.

In one recent audit, it was noted from the external elevation images that settlement cracks were visible but no issues with the pointing were added to the Condition Report. The PAS 2035 process relies on a 'fabric first' approach to improvement – there would be little point installing insulation, for example, if cracks in the wall allow in moisture and damp which would ruin the insulation. Commenting on defects and issues is a crucial aspect in ensuring works are fit for purpose.

Another specific area to note the local planning constraints. As our training manual for RFAs outline, it is best practice for Retrofit Assessors to confirm with local planning departments about whether any proposed measures would be dependent on a planning application. The same is true for dwellings in Conservation Areas or are nationally listed.

Finally, and most importantly for all Retrofit Assessors to consider – the assessment must not be completed after a measure has been installed. This process is designed to ensure homeowners are able to make the best decisions for their property; doing an assessment after the installation of a measure is counter-productive, unnecessary, and disingenuous to the homeowner.

Use of RdSAP Conventions

Alongside the quality of the condition reports being provided, we are becoming increasingly aware of assessments being completed where the RdSAP Conventions are not being followed, or the RdSAP data not being collected in the manner we would expect of a domestic energy assessor.

Retrofit Assessors must be aware that the primary prerequisite in completing a retrofit assessment is to be a Domestic Energy Assessor. This means you must follow the appropriate methodology and Conventions when completing any retrofit assessment and inputting the data accordingly. This includes things such as always using 'as built' insulation where there is no evidence for retrofit insulation, never inputting portable electric heating, using two main heating systems appropriately.

The industry is becoming increasingly concerned by this lack of competency and it is something which will likely be addressed by all Schemes.

Assessments *will* fail audits where the appropriate methodology is not followed, and you *will* be required to rectify these and send to the Retrofit Coordinator.

Key areas to keep an eye on:

- Use of 'as built' in walls, floors, non-pitched roofs, roof rooms;
- Appropriate age bands;
- Appropriate use of extensions;
- Use of U-values;
- Whole-house ventilation;
- Never input electric portable heating;
- Always have sufficient evidence to back up all data inputs.

Occupancy Assessment

The OA is designed to reconcile the assumptions of RdSAP against the real-life occupancy of the dwelling, so making sure this is completed accurately is important to the overall assessment.

One area we have noted from audits is the heating pattern input as part of the OA. We have seen assessors inputting no pattern, despite including a programmer as part of the RdSAP data. Missing this from the OA leads to questions of the accuracy of this part of the Retrofit Assessment, and whether RFAs are paying attention to this information.


Technical Support

Don't forget, if you have any technical support queries, these should be emailed to our Support Log along with some photos so that we can provide the best advice as possible.

Your query can be logged directly with the Support Log at: <http://support.quidos.co.uk>.

Or email: support@quidos.co.uk

Don't forget, we have loads of support information on our Support Log knowledge base!

**Quidos Technical Support Log**

[Home](#) [Solutions](#) [Tickets](#)

How can we help you today?

[+ New support ticket](#)
[📄 Check ticket status](#)

Knowledge base

How do I access the Quidos Support Team?

support@quidos.co.uk (2)

- 📖 [How do I access the Quidos Support Team?](#)
- 📖 [Have you checked the RdSAP Conventions?](#)

Technical Support Publications

Technical Bulletins (17)

- 📖 [Quidos Technical Bulletin - 16/08/2018](#)
- 📖 [Quidos Technical Bulletin - 20/06/2018](#)
- 📖 [Quidos Technical Bulletin - 29/03/2018](#)
- 📖 [Quidos Technical Bulletin - 19/02/2018](#)
- 📖 [Quidos Technical Bulletin - 22/01/2018](#)

» [See all 17 articles](#)

Helpsheets (7)

- 📖 [The Appropriate Use of RdSAP](#)
- 📖 [QA Bulletin: Stock Images and Implications of Use](#)
- 📖 [TS003 - Addenda to EPCs](#)
- 📖 [TS001 - Energy Efficiency Regulations](#)
- 📖 [TS002 - Solar PV inputs to iQ-Energy](#)

» [See all 7 articles](#)

Listed Buildings (1)

- 📖 [Quidos Guidance on Listed Buildings for Energy Assessors](#)

MEES (1)

- 📖 [Energy Efficiency \(Private Rented Property\) Regulations \(also known as MEE...](#)