PAS Hub Lodgement Pre-Checks

Data & Document Lodgement Checks
Lodgement Error Messages

Details Screen

Is the Funding type Status showing in the top right-hand corner of the screen?

If not, you can add the funding type on the Job's Details screen:

- Find the address in the job list and go into the job
- On the details screen go to the action button in the bottom right-hand corner and click on the Set Funding Type button
- In the dropdown field 'Funding Category' select the correct funding category
- In the dropdown field 'Funding Name' select the correct funding name
- If the Funding Category is Warm Homes (SHF or LG) or Devolved Retrofit then you will also have to select a Funding type.
- Click Save

Have the measure details been completed for each measure?

Each measure has fields where data is manually entered and is a Trustmark requirement. This data can be found by clicking the 3 dots, to the right of each measure on the Details screen and selecting Edit Measure Details. Both the General details and Products details screens are mandatory for a Lodgement. The questions may be different for each measure. It's the coordinator's role to ensure the data is correct and aligns with all evidence paperwork on PAS Hub. Here are some things to look out for:

- Has the correct measure name been selected for Heating & Hot Water Controls measure? Installers can no longer use Heating Controls as an answer for Q2 within General details and now need to select the actual control type. We would expect to see at least 2 Heating & Hot Water Controls measures, one being the type Programmer & Thermostat and the other being the type TRVs, as an example.
- 'Has the Measure been installed under your TMLN?' If the installer has used a sub-contractor, they need to set-up all used sub-contractor within their PAS Hub in the Trustmark License Numbers screen. Once set up, they will be able to choose NO to this question and select the sub-contractor from a drop-down list in the following question.
- 'Please select the relevant accreditation scheme'. This needs to be answered as per the Trustmark website and their Accreditation body that registered them with Trustmark. For example, if they have selected NICEIC within the Measure Details but the Trustmark website is showing The Insulation Assurance Authority then the lodgment will fail as they do not align.
- Within Product Details, the question 'Please select the relevant unit for the product', is the actual installed product. Typically for insulation it is m^2 and for Heating/MCS measures its items.
- Within Product Details the question 'Product Installed Value' is the number of items installed. If the Measure is an Air Source Heat Pump then the answer would be 1 item. If it's loft Insulation it could be 25 m^2 and if it's TRV it could be 5.

Is the pre EPR reference showing?

PAS Hub will lodge the pre EPR with ECMK during the PAS Hub lodgement process. If the Pre EPR reference number is blank then you will need to make sure the job is at RC Instructed and ask the assessor to resubmit from the iPad, this should generate the pre EPR reference. If it does not then our support team will be able to assist in correcting the pre EPR reference. Some things to look out for:

- All assessors should not Generate the pre or post EPR on their assessor hub, however we are aware of some installers still asking them to do that so they can see the potential SAP scores. Installers and RCs can see the pre-SAP score on the RdSAP Summary screen on each Job. It will be shown alongside other Pre RdSAP data items.
- We have had cases where assessors resubmit an assessments after entering potential installed measures on the iPad surveys, this updates the RdSAP data and could mean the job being lodged has the wrong Pre-SAP score. You can again check the pre-SAP score on the RdSAP Summary screen or within the IOE documents.

Has the post EPR been completed?

The post EPR is created from PAS Hub by using the 'Create EPR' action button from the Details screen on each Job. This process can be completed on both the Installer side and Coordinator account. If the Coordinator is generating the Post EPR, this process sends the pre RdSAP assessment data to the coordinators account on ECMK Assessor Hub. The coordinator would log into Assessor Hub, finds the new assessment, and adds the data for all measures installed as part of the project. Once completed, the Coordinator clicks 'Generate EPR' on the EPC Summary screen. This EPR will be used for Lodgement. Here are some things to look out for:

- The ECMK account details being used for generating the post EPR needs to be those of a Retrofit Assessor accredited with ECMK. Therefore, if the coordinator is generating the post EPR they also need to be a retrofit assessor with ECMK.
- If you experience an error while trying to access the assessment within assessor hub, it is quite often the case that there are issues with the Pre RdSAP data that was created by the Retrofit Assessor on the iPad, and the issues will have to be rectified before you can create the post EPR.

Is there more than 1 project stage?

Project stages were introduced by Trustmark to allow measures, with a shorter install time, to be lodged before measures that take longer to install therefore the first measures to be installed could be submitted to funders before the other measures. We are not seeing this to be very common in the industry and often the entire project is lodged once all measures have been installed. However, if you do have projects where multiple project stages have been added then a few things to know and look out for:

- If multiple project stages are used then it will incur a higher cost from Trustmark. Each project stage incurs a £15 fee from Trustmark.
- Where multiple project stages are Lodged, the measure details screen must be complete for the measures in the all project stages. There is a question that asks, 'Has this measure been installed' and this question can be answered No for other project stages that are not yet being Lodged.
- Where multiple project stages are Lodged, the Improvement Model must include all measures in the project, regardless of stages.
- If all measures have been installed at the time of first lodgment and there are multiple project stages on the job details screen, the installer needs to move the measures into Project Stage 1 and delete the other project stages.
- If there are multiple project stages on the Job Details screen but some of the project stages do not contain any measures as part of this full project i.e they are cancelled or no measures, the installer needs to move the measures into Project Stage 1 and delete the other project stages
- Your 2nd Project stage, must be Lodged within 3 months of the 1st Project stage, otherwise it would be classed as a brand new Job.

Overview Screen

Has the overview screen been completed satisfactorily?

The Overview screen is below the Details menu when you use the down arrow. This screen contains information that is captured, initially by the assessor during the Retrofit Assessment and pre-populated. The action button allows the installer or the coordinator to edit all information within this screen. The role of the coordinator is to ensure all the information is correct and coincides with the relevant evidence documents. Here are some things to look out for:

- Is the number of occupants great than 0?
- Is the number of bedrooms greater than 0?
- Is the Existing Ventilation showing ‘No’ or ‘Yes-Inadequate’? If so, then a Ventilation Strategy will have to be included within the Designs screen *(see below)* even where no insulation measures are being installed.
- Is the Existing Ventilation showing ‘No’ or ‘Yes-Inadequate’? If so, then a Ventilation Defect will need to be added on the Defects screen.
- Are you happy with the list of Intended Outcomes? if not please edit as necessary.
- Is the number of bedrooms 6 or more? Currently the Trustmark integration API doesn’t allow greater than 5 bedrooms, you must change this field to show 5 bedrooms and enter a note on PAS Hub to explain this.
- Has the Trustmark Funding Details been completed? If not enter the name of the company paying the Retrofit Coordinator as the Funding Organisation and details of how the Retrofit Coordinator has informed the customer about any conflict of interest within the Funding Comment.

Defects Screen

Are there any defects to be considered as part of the designs?

The Defects screen is below the Details menu when you use the down arrow. This screen contains information that is captured, initially by the assessor during the Retrofit Assessment and pre-populated. The action button allows the installer or the coordinator to edit all information within this screen. It is the role of the installer and the coordinator to confirm if any defects are to be rectified as part of the project and if they should be included within the Designs screen *(see below).* Here are some things to look out for:

- Does the ‘Resolution Required’ show ‘Unknown’? You must edit the defect and change to ‘Must’ if it has to be resolved as part of the project or to ‘Can’ where it could be resolved as part of the project, but wouldn’t stop the project being installed. No Defects can be ‘Unknown’ when being Lodged.
- Does the ‘Included in Project’ column show a ✓? If it does, then the defect will need to be selected within the Designs screen *(see below).*

Designs Screen

Has the Designs data screen been completed?

The Design screen is below the Details menu when you use the down arrow, and needs to be completed for all jobs. The Designs data can be added by either the installer or the coordinator and it is the coordinator's role to ensure all the data is correct. You can use the action button to 'Create a designs' followed by entering the details as required. Here are some things to look out for:

- If within the Overview screen 'Existing Ventilation' is showing 'No' or 'Yes-Inadequate' you must switch ON the option for a Ventilation Strategy and complete the details, even where no insulation measures are being installed.
- If there are Defects listed as 'Included in Project', within the defects screen, you must switch ON Defect Resolution included and select the defect(s) this applies to.
- Not all designers have a Trustmark License Number. Only complete that field if the designer has one, if not it can remain blank.
- The designer should have at least one of the qualifications listed in the Designer Qualification field. All certificates must be uploaded to Evidence to show this also.
- Only select the measure(s) that the named person in the Designer field has created the designs for. If there have been multiple designers for a project, further designs can be created.
- If Insulation measures are part of the project, you must switch ON 'Thermal Bridging Risk' and enter the details required.

Improvement Model Screen

Has the improvement model screen been completed satisfactorily?

Below are a few pointers on how to ensure the Improvement Model Screen is compliant for Lodgement:

- Ensure that all measures, which have a ✓ in the 'Included in job details' column, are selected for IOE and MTP. These are the measures that will/have to be installed as part of the project.
- Wherever possible always switch on some measures that could be installed in the future. These measures should have MTP only switch on.
- For any measures, apart from Heating control measures, that are required to be manually added to the Improvement Model screen, a process needs to be followed to include those in any IOE and MTP packages. They must be modelled, using assessor hub and the measure modelling spreadsheet. Ensure to enter the figures for the actual measure(s) and for each package.
- If the project required Heating Controls to be installed, ensure those controls are shown on the improvement model screen and within the IOE and MTP packages. You should see all the individual Heating Control measures, if not you can manually add them.

Project Questions Screen

Has the Project Questions screen been completed?

It is the Retrofit Coordinators responsibility to ensure the project question(s) are answered when they can be sure that the tasks have been completed. The question(s) changes depending on the Funding, so ensure the Funding type has been set correctly, before completing the Project Questions screen.

For example, you will need to ensure that the Smart Meter Consumer Pledge has been provided to the customer and whether they accept, where the Funding is ECO.

If there are no questions shown on the Project Questions screen, Trustmark do not require any further information based on the selected funding type.

Evidence Screen

Have all the documents been uploaded into the Evidence screen?

You find a list of all documents required for a Lodgement on the 'Document Requirement Spreadsheet', which can be downloaded here: Cotality PAS Document Templates. Here are some things to look out for:

- Ensure every job has a Technical Survey and Pre-Installation Building Inspection – Trustmark say that this survey will identify any issues with the condition of the property and specifically with regards to the measures being installed.
- Ensure all documents required by TrustMark have an Evidence Category set on PAS Hub. This will ensure the documents are sent to Trustmark during lodgement. Please stick to the Evidence Categories within the spreadsheet, this will ensure you do not encounter any errors. Where the word 'Clear' is used on the spreadsheet, you do not need an Evidence Catagorey.
- Ensure that the Insurance Guarantee Certificates have the correct Measure Type set against them. To do this, click on the pencil icon to edit evidence next to the uploaded Insurance Guarantee and select the relevant Measure.

Trustmark Lodgement Screen

Have you encountered an error during lodgment?

Most of the errors we have seen are due to missing data as shown above but there are some which are less obvious. The error can be viewed by clicking on the line where it shows a red 'Failed' status and once an error has been corrected then lodgment can be reattempted by clicking the orange 'Retry' button. Below are a few pointers on the common errors we have come across:

- Assessment [pre EPR ref from details screen] is already lodged. Assessment [pre EPR ref from details screen] is not type EPC. This error is because the assessor has the lodged the EPR on their assessor hub. In this case you will need to ask the assessor to create a new assessment on their assessor hub using the original survey and then ask them to contact CoreLogic support to update PAS Hub with the pre reference number.
- {"message":"AssessorTMLN '2427044' does not hold a relevant 'Retrofit Assessor' trade"}. This error is seen when either the assessor has been suspended or is no longer registered with ECMK.
- Failed to call TrustMark during Project Start, error: {"message":"There is no credit remaining in account *Trustmark number * *coordinator name*, please top-up this account to continue"}. This error message shows when the coordinator doesn't have any credit within their Trustmark portal, make sure you top-up the portal with credit.
- Failed to call TrustMark during Project Start, error: {"message":"PropertyInformation.PropertyBedrooms '6' is an invalid option"}. Ensure that the number of bedrooms within the Overview screen is showing 5 or below.
- {"message":"ProductInstalledValue must be greater than zero"}. One of the measures within the Details screen has the Measure Details section completed incorrectly. Go to Measure Details then select the Product Details section and find the question that shows the Product Installed Value and adjust accordingly.