

ECO4 & GBIS Post-Installation Declaration v3

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 been completed, and a copy must be retained with the occupier. **All questions and declaration signatures, where applicable are mandatory unless stated as optional.**

Digital signatures are permitted providing the appropriate individual applies their signature individually to each box that requires a signature and other requirements are met.¹

Any fraudulent activity including falsifying statements, falsifying signatures, and copying- pasting¹ 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 forged signatures will be investigated. Any measures where suspected fraudulent activity or scheme abuse is detected will be rejected.¹

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.²

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

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 the section blank. Otherwise, please fill out all questions.

¹ Please see Chapter 8 in the [ECO4 Delivery Guidance](#) for further information.

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

³ <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 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.
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 installers, where the project consists only of DHC and/or DLMS.
Section C	This section is developed to be signed by the Retrofit Coordinator and relevant installers upon the completion of the ECO project. The section is designed to capture multiple installers.
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 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.

A. Occupier/Landlord Details and Declaration

Occupier or Landlord confirms all information is true by signing Section A	
<ul style="list-style-type: none"> The installation dates recorded in Section B 'Retrofit Details' are correct. The Retrofit Coordinator/Installer 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.⁴ 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 ⁵ / Managing Agent ⁶
Handover date of the project: ⁷	Date: _____
Occupier print name and full address including postcode: ⁸ ⁹	Full name: _____ Address: _____
Contact phone No and email address:	Contact number: _____ Email address: ¹⁰ _____

⁴ 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.

⁵ Including social housing providers.

⁶ Landlord's authorised property management agent.

⁷ Please see Chapter 7 of the [ECO4 Delivery Guidance](#) for the definition of 'handover'.

⁸ Occupier is the applicant/individual receiving the ECO4 measure. If you are signing on behalf of the occupier, the occupier's name should still be printed here.

⁹ Address of property where retrofit has occurred.

¹⁰ If email address is not available enter N/A.

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<p>Signature or signing on behalf of occupier:¹¹</p>	<p>Print name: _____</p> <p>Occupier relationship: _____</p> <p>Signature: _____</p> <p>Date: _____</p>
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¹¹ 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.

B. Retrofit Details (To be completed by Retrofit Coordinator)¹²

1. What is the TrustMark Project Reference Number (if applicable)?		
2. Date of first installed measure: ¹³		
3. Date of last installed measure: ¹³		
4. Have innovation measures (IMs) been installed?		<div> <input type="checkbox"/> Yes <input type="checkbox"/> No </div> <div> <p>Evidence:¹⁴</p> <p>Does all evidence conform to approval requirements for the IMs:</p> <p>Yes <input type="checkbox"/></p> </div>
5. For projects claiming a Building Fabric Repair increase: ¹⁵		I confirm that the value of the Building Fabric Repair is £ _____
ECO4 only	6.Has hydraulic balancing been carried out? ¹⁶	<input type="checkbox"/> Yes <input type="checkbox"/> N/A
ECO4 Only	7.What is the post fuel type? ¹⁷	

¹² Or by the relevant operatives, where the project consists only of DHC and/or DLMs.

¹³ Please see Chapter 7 of the [ECO4 Delivery Guidance](#) for the definition of 'handover'.

¹⁴ 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.

¹⁵ Please see Chapters 4 & 6 in the [ECO4 Delivery Guidance](#) for further information.

¹⁶ Installers must carry out hydraulic balancing following installation of the boiler to a wet central heating system to ensure that the central heating system is balanced. Please see paragraph 5.144 in the [ECO4 Delivery Guidance](#) for further information.

¹⁷ Enter fuel type also for district heating connections.

ECO4 Only	8. If ESH has been installed, is the property on an off-peak electricity tariff? ¹⁸	<input type="checkbox"/> Yes <input type="checkbox"/> No
ECO4 Only	9. Has the premises had an export meter installed?	<input type="checkbox"/> Yes <input type="checkbox"/> No

<100% and Exemptions ¹⁹		
Where applicable, please explain for each measure why less than 100% was installed and any exemptions.		
Measure:	Reason:	Supporting evidence provided: ²⁰
		<input type="checkbox"/> Yes
		<input type="checkbox"/> Yes
		<input type="checkbox"/> Yes
		<input type="checkbox"/> Yes
		<input type="checkbox"/> Yes

¹⁸ There is no requirement for premises receiving electric storage heater (ESH) installation/s as part of an ECO4 project to be on an off-peak electricity tariff pre-project. Rather, electric storage heater installations will not be considered complete unless the property is on an off-peak electricity tariff. Please see paragraph 12.10 in the [ECO4 Delivery Guidance](#) for further information.

¹⁹ Where a measure is exempt in a project that is lodged with Trustmark, it will be validated against data held in the Trustmark Data Warehouse. For non-Trustmark projects suppliers must be able to provide evidence that a measure could not be installed because of an exemption. Information on consumer circumstances is not held by Trustmark and should be held by suppliers in all cases.

²⁰ Please see Chapter 4 of the ECO4 Delivery Guidance for more information on evidencing exemptions.

C. Retrofit Coordinator/Installer(s) Declaration

Please confirm the following statements are true by signing below:²¹

- I confirm that the installation details recorded for the measure(s) described in Section D 'Measure(s) Details' 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:**
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.²²
- For measures not installed to PAS or MCS, I, the installer of these measures, confirm the installation process used to carry out the energy efficiency measure listed below, at the address provided in Section A, complies with building regulation and any other regulation that relates to the installation of the measure.
 - For measures outside of PAS 2030:2023, completing question 4 'Installer Sign off' is **mandatory**.
 - For measures within the scope of PAS 2030:2023, question 4 'Installer Sign off' is **mandatory** if work is subcontracted.
 - For measures inside the scope of PAS 2030:2023, completing question 5 'Compliance Declaration' is **mandatory**.

Retrofit Coordinator sign off

1.Name of Retrofit Coordinator or DHC Operative:	Certification No(s):

²¹ 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.

²² It must be completed by the Retrofit Coordinator only.

2. Address Details:	
3. Retrofit Coordinator or DHC Operative signature:	

4. To be completed and signed by subcontracted installers for measures within the scope of PAS 2030:2023.

Installer Sign off ²³					
Installer name:	Address:	Certificate No(s):	Company:	Measures (non-PAS and PAS subcontracted):	Signature:

²³ 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.

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5. 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 A has been undertaken on the basis of a retrofit design claimed to comply with PAS 2035:2023, using a process complying with PAS 2030:2023, including Annexes indicated in Section E.

Compliance Declaration		
Measures	Retrofit Installer	Certification Body
1: _____	_____	_____
2: _____	_____	_____
3: _____	_____	_____
4: _____	_____	_____
5: _____	_____	_____
6: _____	_____	_____
7: _____	_____	_____
8: _____	_____	_____
9: _____	_____	_____
10: _____	_____	_____

D. Projects including a District Heating Connection Measure or Repair Projects

This section is for ECO4 only.

1. Installer information		
Name of installer, company, and address:		
Installer qualification: <input type="checkbox"/> NVQ Level 2 or 3 in gas, plumbing, or mechanical engineering <input type="checkbox"/> TrustMark registered installer <input type="checkbox"/> Appropriate skills and experience	State other appropriate qualification e.g. certification schemes, gas safe etc. ²⁴	
2. Information on the district heating system		
<input type="checkbox"/> Heat wholly or mainly from electric <input type="checkbox"/> Heat wholly or partly from biofuel, oil, or liquified petroleum gas <input type="checkbox"/> Heat wholly or mainly from a renewable energy system <input type="checkbox"/> Installation of GSHP that draws heat from a SGL ²⁵ <input type="checkbox"/> Other, please provide details: _____	Details, including efficiency:	
Was a wet central heating system installed alongside the DHC? ²⁶		<input type="checkbox"/> Yes <input type="checkbox"/> No
3. Consumer protection		
Registration with Heat Trust Scheme or equivalent:	<input type="checkbox"/> N/A – connection to a DHS that uses a shared ground loop, and is registered with TrustMark <input type="checkbox"/> Registered with Heat Trust ²⁷ <input type="checkbox"/> Other equivalent arrangements - enter details of registration below: _____	

²⁴ On date relevant qualification and pictorial evidence must be provided.

²⁵ A ground loop supplying multiple premises.

²⁶ Picture evidence should be held.

²⁷ We will use a Data Sharing Agreement with Heat Trust to check DHCs are registered with the Heat Trust Scheme.

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4. Information for in-fill DHC measures	
<p>If the project is a house in-fill, has a relevant person confirmed in writing that, to the best of that person's knowledge and belief, no changes were made to 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 A, B or C?</p>	<input type="checkbox"/> Yes <input type="checkbox"/> No
DHC measure installer:	Date:

5. To be completed and signed by installers for measures outside of PAS 2030:2023.

Installer Sign off ²⁸					
Installer name:	Address:	Certificate No(s):	Company:	Measures (non-PAS and PAS subcontracted):	Signature:

²⁸ For non-PAS measures enter the operative certificate number issued by the relevant accreditation body.

E. Measure(s) Details

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

Insulation Measures ²⁹	Product Details ³⁰	Is POPT greater than or equal to 67%? (Y/N) ³¹	Date of Handover (DD/MM/YYYY) ³²
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			

²⁹ Thickness installed is the thickness of the insulation material alone and does not include any boarding, rendering etc.

³⁰ Enter the following details: manufacture, product name, serial number (E.g. Insulation Inc ECO Therm,12/3456).

³¹ If answer is 'No', then enter the exact POPT.

³² Please see Chapter 7 in the [ECO4 Delivery Guidance](#) for the meaning of 'handover'.

Insulation Measures ²⁹	Product Details ³⁰	Is POPT greater than or equal to 67%? (Y/N) ³¹	Date of Handover (DD/MM/YYYY) ³²
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			
Internal Hybrid Wall Insulation (B7) <input type="checkbox"/> Cavity <input type="checkbox"/> Solid Thickness Installed:_____mm			

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 (e.g., main property, extension, front walls etc)	Wall construction E.g. Cavity / cob / solid stone / solid brick / system / timber / park home	Wall area m ² (excl. windows and doors)	m ² of insulation to be installed			
			CWI		IWI/EWI	
			CWI		IWI/EWI	
			CWI		IWI/EWI	
			CWI		IWI/EWI	
			CWI		IWI/EWI	
Total wall areas		A	CWI	B	IWI/EWI	C
		Total wall areas			IWI/EWI (type 2)	D
CWI POPT	B/A= %		IWI/EWI POPT (type 2)		D/A= %	
IWI/EWI POPT	C/A= %					

Insulation Measures ³³	Product Details ³⁴	Is POPT greater than or equal to 67%? (Y/N) ³⁵	Date of Handover (DD/MM/YYYY) ³⁶
Loft Insulation (B9) <input type="checkbox"/> (Less than or equal to 100 mm) <input type="checkbox"/> (Greater than 100 mm) 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 (Residual loft area not present) <input type="checkbox"/> No-Residual loft not insulated by installer			

³³ Thickness installed is the thickness of the insulation material alone and does not include any boarding, rendering etc.

³⁴ Enter the following details: manufacture, product name, serial number (E.g. Insulation Inc ECO Therm,12/3456).

³⁵ If answer is 'No', then enter the exact POPT.

³⁶ Please see Chapter 7 in the [ECO4 Delivery Guidance](#) for the definition of 'handover'.

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 ²)	m ² and type of insulation to be installed ³⁷							
			LI ≤ 100mm		LI > 100mm		FRI /PRI		RIRI	
			LI ≤ 100mm		LI > 100mm		FRI /PRI		RIRI	
			LI ≤ 100mm		LI > 100mm		FRI /PRI		RIRI	
			LI ≤ 100mm		LI > 100mm		FRI /PRI		RIRI	
			LI ≤ 100mm		LI > 100mm		FRI /PRI		RIRI	
Total roof area³⁸		A	LI ≤ 100mm	B	LI > 100mm	C	FRI /PRI	D	RIRI	E
LI ≤ 100mm POPT	B/A= %	FRI/PRI POPT						D/A= %		
LI > 100mm POPT	C/A= %	Percentage of RIRI measure installed³⁹						F %		
		RIRI POPT						(E x F)/A= %		

³⁷ For RIRI, 'E' refers to the floor area of the RIR + the residual area, not the amount of insulation installed.

³⁸ For RIRI measures, the total roof area is the footprint area and not all the elements of the RIRI measure.

³⁹ 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.

Insulation Measures ⁴⁰	Product Details ⁴¹	Is POPT greater than or equal to 67%? (Y/N) ⁴²	Date of Handover (DD/MM/YYYY) ⁴³
Underfloor Insulation(B6) <input type="checkbox"/> Solid <input type="checkbox"/> Suspended			

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

⁴⁰ Thickness installed is the thickness of the insulation material alone and does not include any boarding, rendering etc.

⁴¹ Enter the following details: manufacture, product name, serial number (E.g. Insulation Inc ECO Therm,12/3456).

⁴² If answer is 'No', then enter the exact POPT.

⁴³ Please see Chapter 7 in the [ECO4 Delivery Guidance](#) for the definition of 'handover'.

Insulation Measures ⁴⁴	Product Details ⁴⁵	Is POPT ≥ 67%? (Y/N) ⁴⁶	Date of Handover (DD/MM/YYYY) ⁴⁷
Park Home Insulation (B13) <input type="checkbox"/> Floor <input type="checkbox"/> Wall <input type="checkbox"/> Roof			
Other Insulation <input type="checkbox"/> Draught Proofing (B2)			
Window glazing (B3) (ECO4 Only) <input type="checkbox"/> Single to double <input type="checkbox"/> Improved double			
Higher performance external doors (B3) (ECO4 Only)			

⁴⁴ Thickness installed is the thickness of the insulation material alone and does not include any boarding, rendering etc.

⁴⁵ Enter the following details: manufacture, product name, serial number (E.g. Insulation Inc ECO Therm,12/3456).

⁴⁶ Greater than or equal to 67%. If answer is 'No' then enter the exact POPT.

⁴⁷ Please see Chapter 7 in the [ECO4 Delivery Guidance](#) for the definition of 'handover'.

Heating Measures	Product Details ⁴⁸	Is POPT ≥ 67%? (Y/N)	Date of Handover (DD/MM/YYYY) ⁴⁹
Boiler Measures (ECO4 Only) PAS annex's <input type="checkbox"/> Broken <input type="checkbox"/> Repair <input type="checkbox"/> Upgrade			
First Time Central Heating (ECO4 Only) 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: _____ Smart Thermostat: _____ TRVs: _____ Weather Compensation: _____ Room Thermostat: _____ TTZC (number of zones): _____		

⁴⁸ 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).

⁴⁹ Please see Chapter 7 in the [ECO4 Delivery Guidance](#) for the definition of 'handover'.

Heating Measures		Product Details ⁴⁸	Is POPT ≥ 67%? (Y/N)	Date of Handover (DD/MM/YYYY) ⁴⁹
	Number of radiators: _____ Load Compensation: _____			
Electric Storage Heater (D1)⁵⁰ (ECO4 Only) <input type="checkbox"/> Broken <input type="checkbox"/> Repair <input type="checkbox"/> Upgrade				
District Heating Connection (ECO4 Only) <input type="checkbox"/> New <input type="checkbox"/> Repair				

Solar PV measures only						
	Product Detail	KWp	OI Factor	Inclination	Orientation	Individual Array POPT
ECO 4 only						
				Date installed (DD/MM/YYYY)	Hand over Date (DD/MM/YYYY)	Total Measure POPT
Other measures (Including data light and alternative methodology)						

⁵⁰ If more than one ESH installed in a property, then enter details at the "Other Section" below.

	Type of measure ⁵¹ :	Product detail	Is POPT \geq 67%? (Y/N) ⁵²	Date of handover (DD//MM/YYYY)

⁵¹ Enter relevant type of measure e.g. DLM, Solar PV, ESH etc.

⁵² If answer is 'No', then actual POPT should be entered.