

ECO4 & GBIS Eligibility and Pre-Installation Declaration v1.1

Introduction

The purpose of this form is to confirm the eligibility of properties receiving measures under either ECO4 or the Great British Insulation Scheme (GBIS). It is also used to collect project/retrofit-level information before the installation of measure(s) takes place.

Both Section A (Eligibility) and Section B (Pre-installation Survey) must be completed before the first measure is installed. **All questions and declaration signatures are mandatory unless stated as optional.**

The information and details recorded here must be true and accurate. If issues arise that raise doubts around the accuracy of the evidence and information provided, measures will be investigated and may be rejected. Any fraudulent activity, including misrepresenting details of the property, may also be reported to law enforcement agencies.

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 evidence of forged signatures will be investigated. Any measures where suspected fraudulent activity 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

All photographic evidence in relation to a measure must be appropriate and in line with UK GDPR³ and Data Protection Act 2018 requirements.⁴

For a better understanding of how the data in this form will be used under the Great British Insulation Scheme or ECO4, please visit our website.⁵

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

² <https://www.legislation.gov.uk/ukpga/2018/12/contents/enacted>

³ Please note you may be required to provide photographic evidence alongside this document. Photographic evidence in relation to a measure must be appropriate and in line with UK GDPR and Data Protection Act 2018 requirements.

⁴ <https://ico.org.uk/for-organisations/guide-to-data-protection/guide-to-the-general-data-protection-regulation-gdpr/>

⁵ <https://www.ofgem.gov.uk/environmental-and-social-schemes/great-british-insulation-scheme>, [ECO privacy notice](#) | Ofgem

Please be aware that 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.

Additional pages should be appended if there is not enough space in the fields provided.

Completing the Eligibility and Pre-Installation Declaration

Form Information	
Section A Eligibility Requirements	This section captures the details of the occupier and landlord as well as the eligibility requirements. The occupier/owner/landlord must read and sign the declaration at the end of this section.
Section B Pre-Installation Survey	This section captures project and measure information before installation takes place. It must be signed by the retrofit coordinator or district heating connection engineer at the end of this section.

A – Eligibility Requirements

Scheme Route	Field	Response
	<p>1. Name of Occupier:⁶</p> <p>Tenure Type:</p> <p>Occupier email and telephone:</p>	<hr/> <p><input type="checkbox"/> Owner Occupied <input type="checkbox"/> Private Rented <input type="checkbox"/> Social Housing</p> <hr/> <hr/>
	<p>2. Landlord/social landlord (if applicable)</p> <p>Name:</p> <p>Organisation Name:</p> <p>Address:</p> <p>Email:</p> <p>Telephone:</p>	<hr/> <hr/> <hr/> <hr/> <hr/>
	3. Address of installation (including postcode)	

⁶ Occupier is the individual receiving the ECO measure.

Scheme Route	Field	Response
ECO4 only	4. Household eligibility ⁷	<input type="checkbox"/> Help to Heat Group <input type="checkbox"/> Social Housing <input type="checkbox"/> LA Flex <input type="checkbox"/> In-Fill <input type="checkbox"/> Supplier Flex
GBIS Only		<input type="checkbox"/> General Eligibility <input type="checkbox"/> Low-income and Social Housing <input type="checkbox"/> In-fill <input type="checkbox"/> LA Flex
GBIS Only	5. Council Tax Band	<input type="checkbox"/> Band A <input type="checkbox"/> Band B <input type="checkbox"/> Band C <input type="checkbox"/> Band D <input type="checkbox"/> Band E
	6. Verification method ⁸	<input type="checkbox"/> WHD Core Group ⁹ <input type="checkbox"/> DWP Match ¹⁰ <input type="checkbox"/> Supplier Declaration ¹¹ <input type="checkbox"/> Child Benefit ¹² <input type="checkbox"/> ECO Eligible Referral ¹³ <input type="checkbox"/> LA Declaration ¹⁴ <input type="checkbox"/> HTHG Benefit Letter ¹⁵ <input type="checkbox"/> N/A (eg Social Housing) <input type="checkbox"/> Council Tax Letter (GBIS only) <input type="checkbox"/> Other ¹⁶ _____

⁷ See Chapter 3 of the ECO4 Delivery Guidance for more information regarding the eligibility types.

⁸ See Chapter 3 of The Great British Insulation Scheme Delivery Guidance or ECO4 Delivery Guidance.

⁹ 'WHD Core Group' applies to England and Wales (but not Scotland) and may be selected where the supplier can produce a WHD Core Group notice at audit for the help to heat group member. A data link exists with the Department of Work and Pensions (DWP) so that help to heat group eligibility can be verified through a data matching exercise.

¹⁰ 'DWP Match' should be selected for measures where help to heat group eligibility has been verified using this method.

¹¹ 'Supplier declaration' should be selected where 'eligibility type' also has 'supplier declaration'.

¹² 'Child Benefit' may be entered where a supplier can produce a Child Benefit Self-Declaration at audit.

¹³ Only suppliers that have signed up to the **ECO Eligible Referrals (EER)** route with DWP should select this option.

¹⁴ Suppliers should select 'LA Declaration' for measures where help to heat group eligibility has been verified using this method.

¹⁵ 'HTHG Benefit Letter' should be selected where DWP match is not available.

¹⁶ 'Other' should only be selected in exceptional circumstances when agreed with obligated supplier and Ofgem in advance of commencing the project.

Scheme Route	Field	Response
	7. URN (If applicable) ¹⁷	
	8. Occupancy evidence ¹⁸	<input type="checkbox"/> Utility Bill <input type="checkbox"/> Mortgage Statement <input type="checkbox"/> NHS Letter <input type="checkbox"/> Tenancy Agreement <input type="checkbox"/> Other ¹⁹ _____
	9. Has this retrofit received funding from another government scheme? ²⁰	<input type="checkbox"/> Yes <input type="checkbox"/> No If yes, list scheme: _____
GBIS ONLY	10. Has the PRS Exemption Register Evidence (if applicable) been provided? ²¹	<input type="checkbox"/> Yes <input type="checkbox"/> No

¹⁷ Please see chapter 3 of either the [ECO4 Guidance: Delivery](#) or [Great British Insulation Scheme Delivery Guidance \(ofgem.gov.uk\)](#).

¹⁸ Occupancy evidence is only relevant to private domestic premises i.e. private rented sector and owner occupied but not social housing. Confirmation that domestic premises meet 'dwelling' definition from in The Energy Performance of Buildings (England and Wales) Regulations 2012 and The Energy Performance of Buildings (Scotland) Regulations 2008.

¹⁹ See the [ECO4 Guidance: Delivery](#) or the [Great British Insulation Scheme Delivery Guidance \(ofgem.gov.uk\)](#) for other documents that may be used as evidence.

²⁰ Except for GBIS or ECO4 funding. Please see chapter 4 of the [Energy Company Obligation \(ECO4\) Guidance: Delivery](#) or Chapter 4 of [Great British Insulation Scheme Delivery Guidance \(ofgem.gov.uk\)](#) for other government schemes.

²¹ Evidence will be in the form of a screenshot of the PRS exemption register for pre-installation SAP band is band F or G.

Declarations and Sign off

Declaration

First-time central heating (only relevant for ECO4 projects claiming FTCH, relevant to owner-occupiers or social/private landlords only)

The signatory must review the available evidence and records relating to the premises prior to signing this declaration. The presence of a central heating system (including district and renewable heating) or an electric storage heater can be identified with reference to any available evidence within or records relating to the premises. Examples could include an old boiler, pipework, heating controls, radiators, storage heaters, or documents such as an EPC. Where such evidence exists, the measure(s) would be ineligible under this First-Time Central Heating provision.

"I sign below to declare that to the best of my knowledge, at no point prior to the installation of first-time central heating, did the premises have a wet central heating system nor, at no point since 1 April 2022, did the premises have a working, efficient electric storage heater(s)."

Permission and blended funding (only relevant to PRS and social landlords and owner-occupiers)

Funding for measures delivered under ECO4 and the GBIS cannot be blended with funding from other government schemes or grants. Any measures outside of either schemes delivered to the same property would have to be installed either before or after measures are installed.

I can confirm I am the owner or landlord of the property listed above and hereby give my consent for the works to be completed. I understand I may be contacted by any organisation carrying out the installation works or providing the funding, Ofgem, or an energy supplier, to verify this declaration as confirmation of permission. By signing this declaration, I acknowledge that funding is being claimed through either the Energy Company Obligation (ECO4) scheme or the Great British Insulation Scheme, and I have not and will not seek any funding for such measures through other government schemes or grants.

Social Housing (only relevant for social landlords)

Social landlord is defined in paragraph 4 of Schedule 1 of the Electricity and Gas (Energy Company Obligation) Order 2022. By signing, I, the social landlord, declare to the best of my knowledge and belief that:

- I can confirm that the SAP or RdSAP assessment is a true reflection of the property prior to the installation of the measure(s).
- The premises are let below market rate, or where the premises are currently void, have previously and will be let below market rate.

Data use

By signing this declaration, I confirm that I have received and read a privacy notice to explain how my data will be used, and that this has been shared with all members in the household who may be included or named in documents or information provided in the installation of this energy efficiency measure.

Child Benefit (only relevant if child benefit has been selected for the verification method)

I, the occupier of the premises detailed above, declare that I am in receipt of Child Benefit, and that for the corresponding number of qualifying children or young persons within this benefit, the threshold for single or combined annual gross income (from all sources) is not breached.

Child Benefit Number:

If no CHB number, please provide National Insurance number:

I hereby declare that all the information given above in the full declaration section is true and accurate to the best of my knowledge.

Occupier name:	
Signature ²² :	
Date:	
Owner name:	
Signature ²³ :	

²² Occupier is the applicant/individual receiving the ECO4 measure. If you are signing on behalf of the occupier, the occupier name should still be printed here. Owner Occupier should also sign here.

²³ Owner if not an occupier and not a landlord.

Or Name of person signing on behalf of occupier ²⁴ : Relationship to occupier: Signature: Date:	
Landlord/Social landlord (officer) name: Signature: Date:	

²⁴ 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.

Definitions

1. "Single claimant" means a person who is not a member of a Couple.
2. "Couple" means:
 - two people who are married to, or civil partners of, each other and are members of the same household; or
 - two people who are not married to, or civil partners of, each other but are living together as a married couple.
3. "Child" and "qualifying young persons" means a person under the age of 16 (or under 20 if they are in approved education or training). A person shall be treated as responsible for a child or qualifying young person who is normally living with them or paying at least the same amount as Child Benefit (or the equivalent in kind) towards looking after them. More detail can be found on the government website for child benefit²⁵
4. "Income" means annual gross income from all sources, including housing-related benefits, before tax. This should be determined based on the most recently completed annual tax year which runs from 6th April to 5th April of the following year.
5. "Relevant third party" means the person in the supply chain who has engaged with the consumer regarding the installation of the ECO measure. This could include, but is not limited to: the installer, operative, assessor or managing agent.
6. The other qualifying benefits, as listed in schedule 2 of the Electricity and Gas (Energy Company Obligation) Order 2022.

Type of claimant ²⁶	Number of children or qualifying young persons			
	1	2	3	4+
Single claimant annual income	≤ £19,900	≤ £24,800	≤ £29,600	≤ £34,500
Member of a couple combined annual income	≤ £27,500	≤ £32,300	≤ £37,200	≤ £42,000

The use of occupier self-declarations to prove receipt of Child Benefit is not sufficient by itself so alternative evidence, such as council tax letters to show the number of adults residing at the address, and the Child Benefit letter showing how many children within the household are supported by the payment, will also be required.²⁷

²⁵<https://www.gov.uk/child-benefit/eligibility>

²⁶ Note that you do not need to circle / mark the combination that matches your circumstances, the only confirmation required is to sign the declaration.

²⁷ For more information see paragraphs 3.139 – 3.143 of the [ECO4 Delivery Guidance](#) or [The Great British Insulation Scheme Delivery Guidance](#).

B. Pre-Installation Survey

Field	Response	
11. Date of pre project RdSAP / SAP survey:		
12. Starting SAP Band ²⁸	<input type="checkbox"/> High B <input type="checkbox"/> High C <input type="checkbox"/> High D <input type="checkbox"/> High E <input type="checkbox"/> High F <input type="checkbox"/> High G <input type="checkbox"/> Low B <input type="checkbox"/> Low C <input type="checkbox"/> Low D <input type="checkbox"/> Low E <input type="checkbox"/> Low F <input type="checkbox"/> Low G	
13. Starting SAP rating:		
14. Total floor area (m ²)		
15. Where relevant, pre retrofit EPC reference number: ²⁹		
16. Is the property in a rural area? ³⁰	<input type="checkbox"/> Yes (Enter area code) <input type="checkbox"/> N/A	Output Area Code:
17. Has the sketch plan/floor plan of the premises been provided alongside pictorial evidence?	<input type="checkbox"/> Yes	
18. Has smart meter advice been issued?	<input type="checkbox"/> Yes	

²⁸ [Standard Assessment Procedure - GOV.UK \(www.gov.uk\)](https://www.gov.uk/government/publications/standard-assessment-procedure)

²⁹ An EPC is required for projects that only include DHC and DLM measures and for in-fill DHC measures, except where the DHC measure is the installation of a shared ground loop GSHP. For projects within the score of PAS the assessment will be lodged with Trustmark and no reference number is needed. Mix of a pre-EPC and post EPR would not be accepted. The pre-retrofit and post-retrofit assessment must use the same methodology. Where the pre-retrofit is a full SAP lodged as an EPC, the post-retrofit must be the same. This is stated in the [supplier data dictionary](#), in the description for the field 'Post_Assessment_Methodology'.

³⁰ [Rural/urban classifications - Office for National Statistics](#) - Applies to England, Wales and Scotland. Premises in rural area in England aren't eligible for the rural off gas uplift.

Information on Wall Insulation Measures

This section is required for measures or projects which include wall insulation.

All wall insulation measures	
19. Approximate construction year or age band	
20. Predominate wall construction type eg solid brick, timber frame or system build ³¹	
21. Percentage of total wall area this wall type:	%
Cavity wall insulation measures	
22. Are you claiming on ECO for extracted failed cavity wall?	<input type="checkbox"/> Yes ³² <input type="checkbox"/> No
23. Are the walls already partially insulated? ³³	<input type="checkbox"/> Yes <input type="checkbox"/> No

³¹ Although most system build properties meet the definition of solid wall, some have external walls of a standard cavity construction and require a cavity wall insulation measure. The construction type of the external walls of a system build property should therefore be assessed prior to insulating the property.

³² A report from a chartered surveyor will be required to validate the failed cavity wall material and evidence provided that no existing guarantee is in place.

³³ If the U value of the wall already meets relevant standards, any additional insulation will not be an eligible CWI measure.

Information for Heating Measures

This section is required for projects or retrofits which include the installation of a heating measure. Questions apply to both GBIS and ECO4 unless stated otherwise.

24. What heating controls currently exist?	<input type="checkbox"/> Room Thermostat <input type="checkbox"/> Boiler Programmer <input type="checkbox"/> Smart Thermostat <input type="checkbox"/> Compensation <input type="checkbox"/> TTZC <input type="checkbox"/> TRV (if TRV please go to 26) <input type="checkbox"/> No heating controls currently exist																				
25. Are there any controls selected above that are NOT working? Please state:																					
26. TRV	<ul style="list-style-type: none"> ➤ The existing number of radiators: _____ ➤ The existing number of radiators with TRVs: _____ ➤ The existing number of heated towel rails: _____ <p>Does the system incorporate a bypass radiator? <input type="checkbox"/> Yes <input type="checkbox"/> No</p>																				
27. Pre-existing ESH (ECO4 only)	<div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <input type="checkbox"/> Yes <input type="checkbox"/> No </div> <div style="width: 45%;"> <p>Type:</p> <table border="0"> <tr><td>1</td><td>_____</td></tr> <tr><td>2</td><td>_____</td></tr> <tr><td>3</td><td>_____</td></tr> <tr><td>4</td><td>_____</td></tr> <tr><td>5</td><td>_____</td></tr> </table> <p>Responsiveness:</p> <table border="0"> <tr><td>1</td><td>_____</td></tr> <tr><td>2</td><td>_____</td></tr> <tr><td>3</td><td>_____</td></tr> <tr><td>4</td><td>_____</td></tr> <tr><td>5</td><td>_____</td></tr> </table> </div> </div>	1	_____	2	_____	3	_____	4	_____	5	_____	1	_____	2	_____	3	_____	4	_____	5	_____
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28. Pre-existing Solar PV (ECO4 only)	<input type="checkbox"/> Yes <input type="checkbox"/> No	kWp: _____
29. Is there a solar export meter? (ECO4 only)	<input type="checkbox"/> Yes <input type="checkbox"/> No	

Sketch Plan and Instructions for all measure types

Basic sketch plan instructions for all measure types

Room Key³⁴: BR# = Bedrooms; LR = Living Room; K = Kitchen; D = Dining Room; BTH = Bathroom.

Wall Type key: Cavity/non cavity; Adjacent to unheated space/corridor.

Doors should only be included where the measure being scored is a high-performance external door, and windows should only be included where the measure is window glazing.

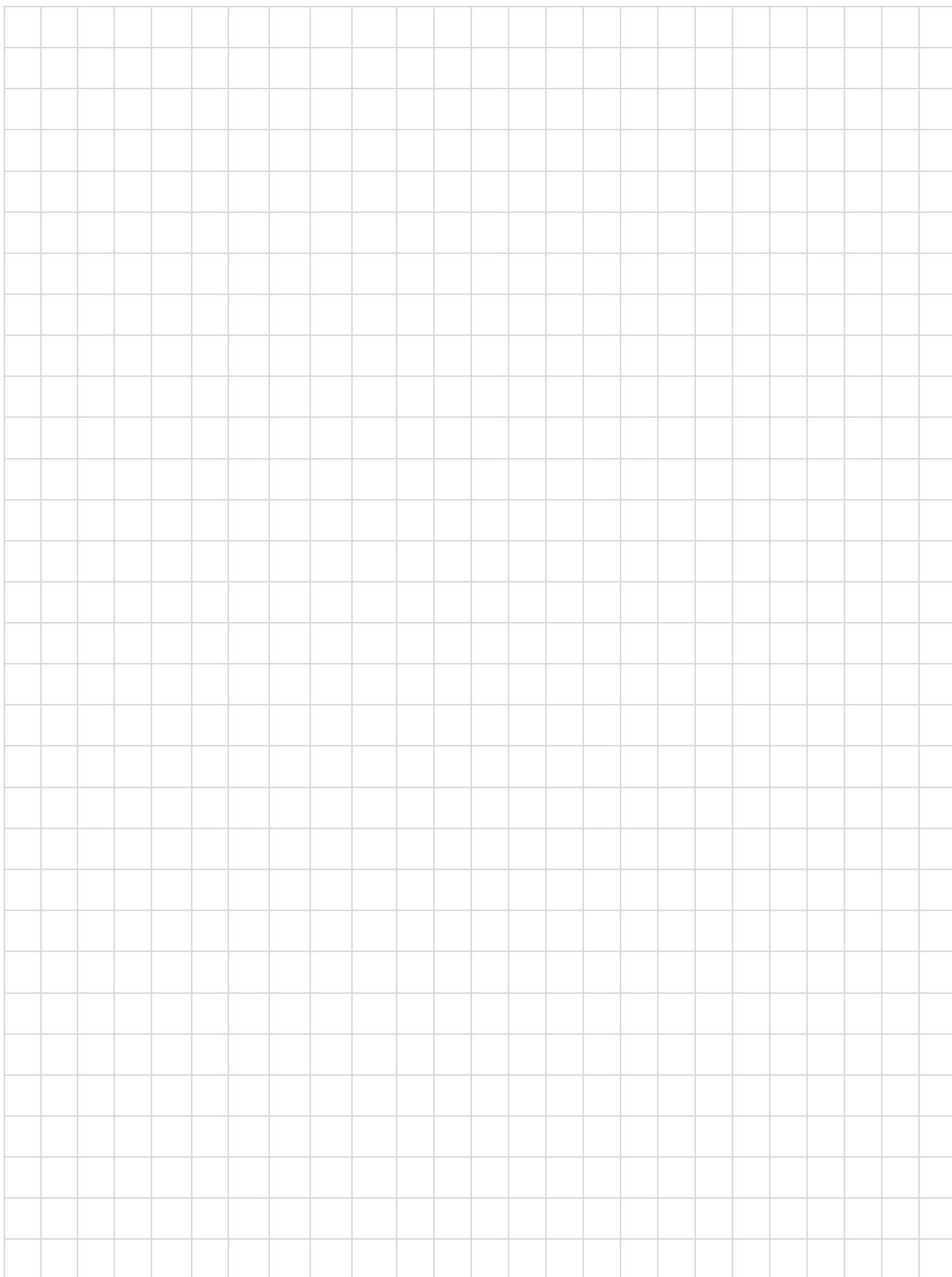
Sketch plan instruction by measure type

Heating Measures

Roof, wall and floor measures

<p>HS# = heating system/boiler (HS1 = main heating source)</p> <p>RAD = Radiator with no existing TRV</p> <p>RADT = Radiator with existing TRV</p> <p>RS = Room stat</p> <p>ST = Smart thermostat</p> <p>TW = Tower rail</p> <p>TWTRV = Towel rails with TRVs</p> <p>RH = Room heater</p> <p>ESH = Storage heater</p> <p>UFH = Under floor heating</p>	<p>The location of pre-main heat source(s) should be clearly recorded on the sketch using the key in the 'heating measures' column.</p> <p>PR = Pitched roof</p> <p>FR = Flat roof</p> <p>RIR = Room in roof</p> <p>RES = RIRI Residual Loft Area</p> <p>UFI = Under floor insulation (specify solid or suspended)</p>
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³⁴ For multi storey premises, please record floor position, i.e. basement, ground floor, room-in-roof adjacent to the relevant sketch.



Retrofit Coordinator or DHC Installer Declaration

Details and declaration		
Retrofit Coordinator or DHC Installer: ³⁵ Name: Company: Address: Telephone: Email:	Trustmark Licence Number (TMLN): ³⁶	
I confirm that all the information on this form has been accurately presented:	<input type="checkbox"/> Yes <input type="checkbox"/> No (If no, enter what has not been declared and what's the reason for not declaring it)	
I confirm that the building was pre-existing before 1 April 2022	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Retrofit Coordinator or DHC Installer Signature and date:	Date:	

³⁵ A DHC installer may sign this declaration only in the case of projects consisting solely of a connection to a district heating system (DHC) or a DHC and data light measures (DLMs) only.

³⁶ Not mandatory for DHC/ DLM measures.