

ECO3 Digital Software guidelines *ECO Reporting Working Group Guide*

When completing ECO documentation, energy companies have requested that the points below are followed as a minimum standard.

This document sets out guidelines which will help provide assurance around the quality and reliability of electronic documents. This document supplements the Quality of Documentation Guide which outlines the minimum standards that energy companies have suggested should be followed when completing any ECO documentation.

1. Some obligated energy suppliers may request confirmation of which electronic applications or software is being used in the delivery of ECO measures. Please check with the relevant supplier(s), a demo of the software may be required.
2. The software used to produce electronic documents must not be capable of assigning a customer signature to a document which they have not signed. The signature must be independently embedded and not copied or replicated. Individual signatures must be obtained for each individual document.
3. It must not be possible to change the date of documents that were completed electronically.
4. The format of any document must be compatible with standard software so that they can be opened and read by Ofgem and suppliers without the need to purchase new or additional software.
5. Signature and signature boxes within documents should be user-friendly and consumers should receive instructions on how to complete these correctly if required. It is recommended that the operative is equipped with a stylus to ensure satisfactory signature is captured.
6. Photos taken within or imported to an ECO software tool must be time/date-stamped. All reasonable efforts should be made to GPS-stamp photos, although we understand that sometimes this is not possible.
7. Software must ensure that fields and signatures cannot be modified at a later date. Where there is a need for modification, documents should be version controlled and a record of any change stored.

8. Documents must be saved automatically once completed and a version history of any modifications kept.
9. Where customers have signed documents electronically they must have access to documents after any works are completed. This can include paper documents.
10. It must not be possible to auto-populate fields which require information specific to a premises or measure such as dates or customer signatures. Fields which apply in all cases such as the installer's PAS certification number & address/contact details of the consumer can be auto-populated.
11. If it is not possible to use an electronic app to obtain particular documents and customer signatures, the branded electronic paperwork should not be used – the 'App' brand should not show on paperwork which has been manually completed and signed.
12. Should any instances of replicated or copied signatures occur when using electronic paperwork or a digital app, this should be investigated and rectified prior to sending to the obligated supplier.
13. Electronic applications must comply with the GDPR data protection principles, and in particular the "data accuracy" principle, (Article 5(1)(d)).