# Smart Survey
User Guide

What is Smart Survey?

Smart Survey is an iOS app which allows for data collection, site note generation and lodgement on site of EPCs from either an iPad or iPhone running the latest version of iOS. Details of where to download the app and your login details can be found in your Welcome email from ecmk.
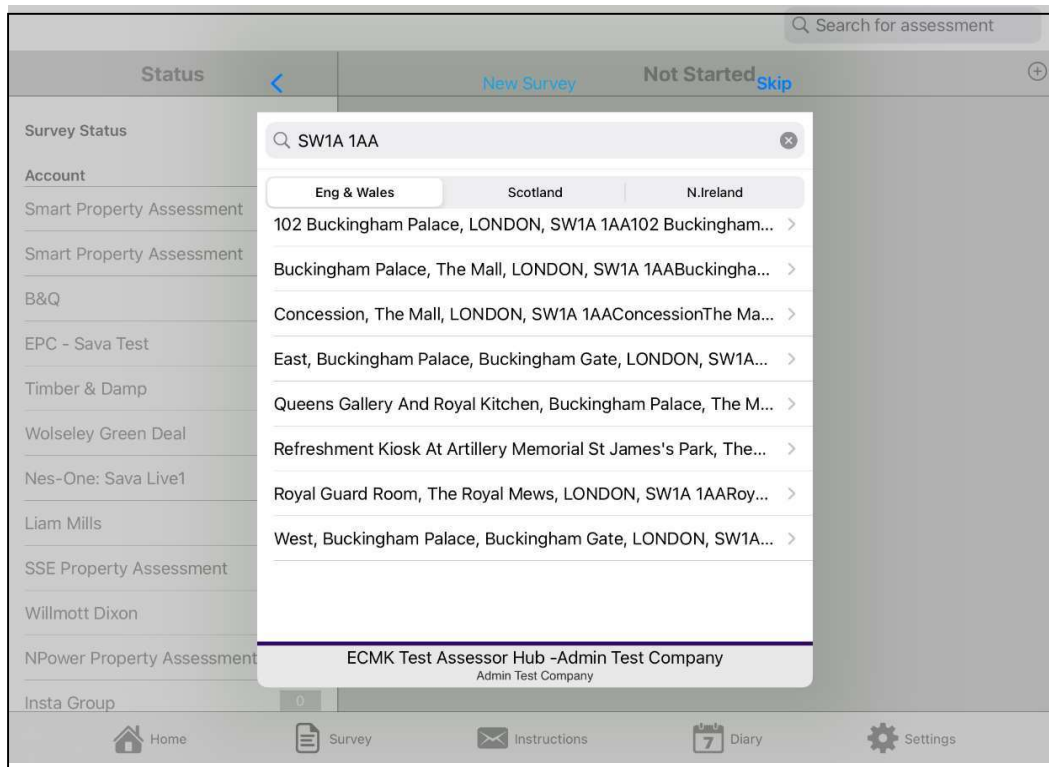
> You may need to go into your device's setting to allow the app to open.
> Go to: **Settings > General > VPN & Device Management**
> *(Tap on Etech Solutions Limited, and select Trust)*

Getting Started

Having entered your username and password you will be met with the home screen. To start a survey, select Survey at the bottom and the + symbol in the top right-hand corner.
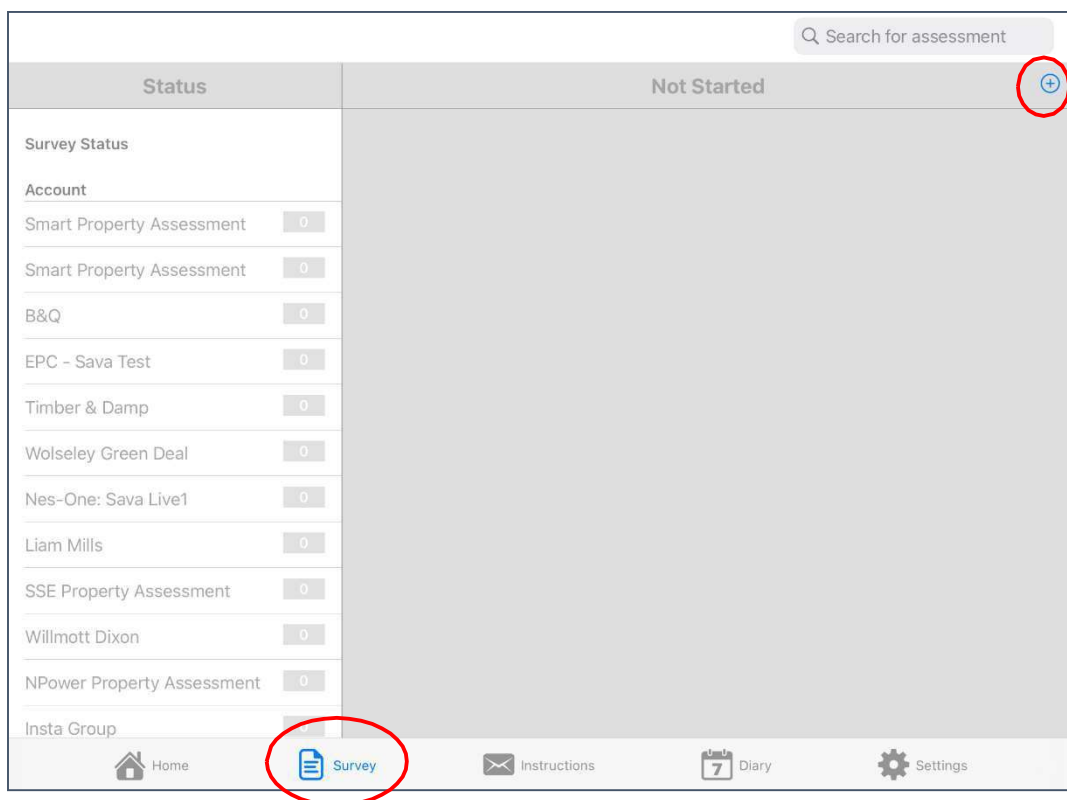
Select the account you wish to use. If you only have one account, you will only have one option. Then enter the postcode of the property you are assessing. A list will then appear of the available addresses in the postcode area. Select the desired address from the list.

If the address is not on the list, press **Skip** and enter the address manually, ensuring that everything is spelt and formatted correctly as this will be as it appears on the certificate.

You are now ready to start inputting the EPC data and capturing the evidence.

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Taking Photographs

As you work your way through the assessment, as well as inputting the data, you will be asked for justification for your inputs. These questions are part of the site notes that the app will generate at the end. Likewise, the app will prompt you to provide photographic evidence as you work your way through.

When prompted you have the following options:

- **Take later** – This will allow you to move on through the section and will be reminded of the evidence in Photographs Required.
- **Not Applicate** – Used when observation cannot be supported by photographic evidence (should be used rarely)
- **Select** – Allows you to select a image already taken within the app or stored externally on the device.
- **+ Add Photo** – Open the camera to allow you take a picture.
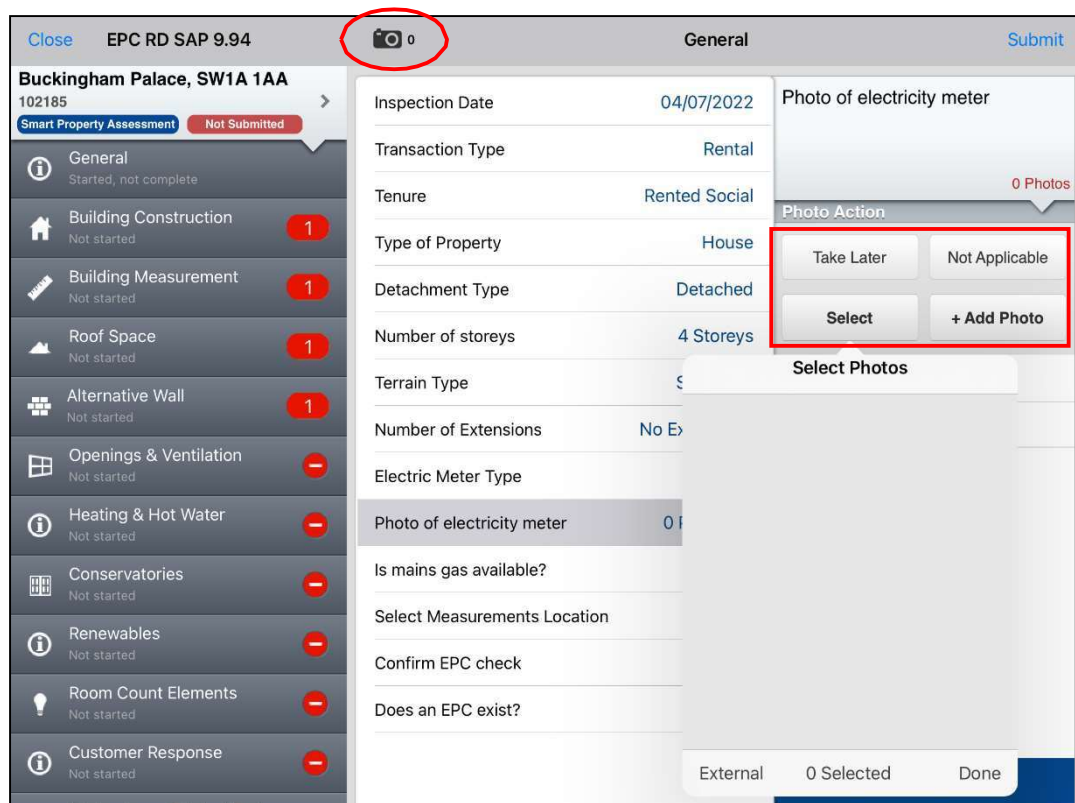
The Camera Icon at the top of the screen allows for the camera to be opened at any time and the image saved with the app. These images can then be assigned to the relevant part of the assessment by pressing the Select option.

All images taken within the app will be date stamped and have their geo location on, as per evidence requirements. Images taken outside of the app may not contain this information.
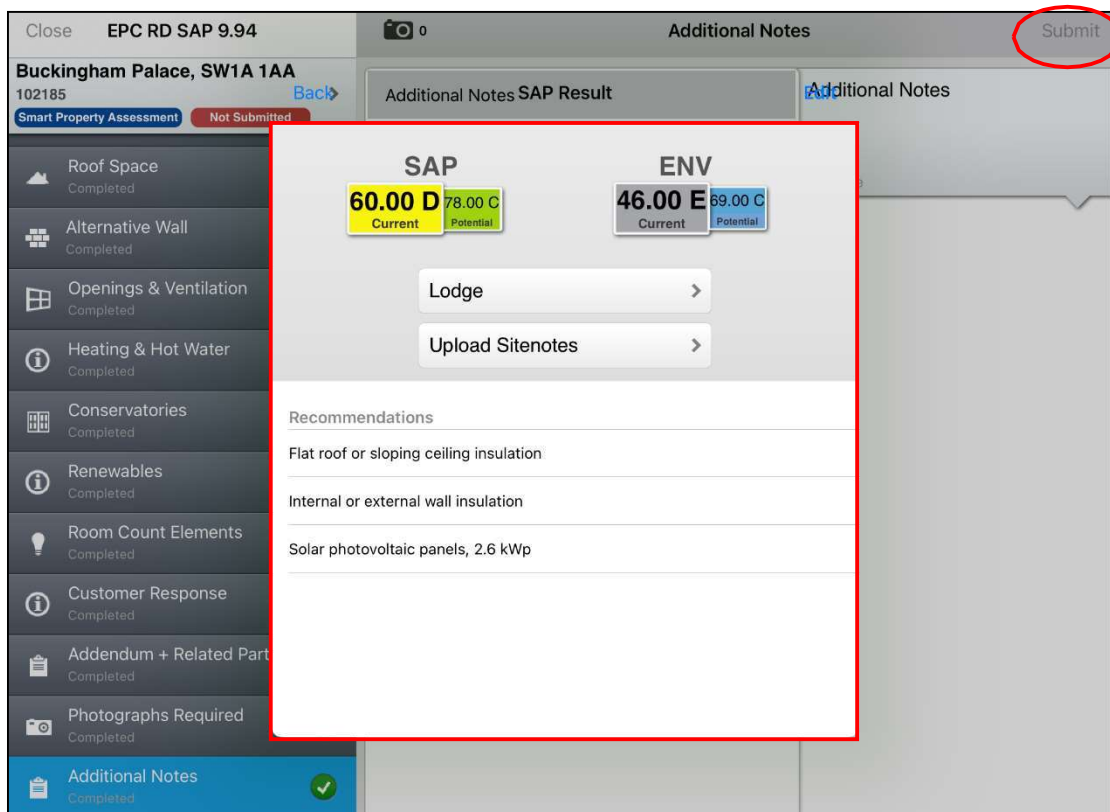
Labelling Photographs

Once you have taken an image and/or confirmed you want to assign the image to this part of the assessment, you will be prompted to give the image a description. Providing a description of the evidence is an evidence requirement. Suggested descriptions will be listed on the left-hand side of the images, however if you wish to write your own this can be done via the text entry box at the top of the window.
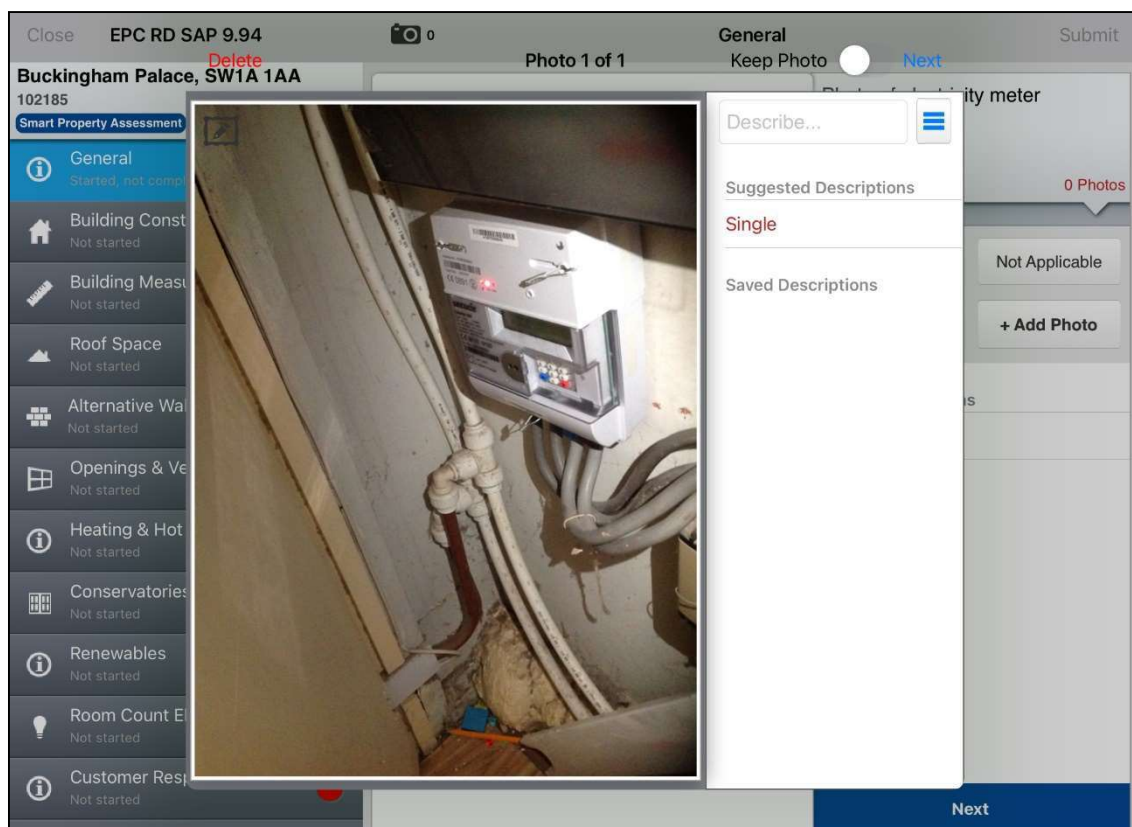
Submitting and lodging

Once all sections on the left-hand side of the screen have either a green tick or green number, the assessment may be submitted and lodged. This is done by pressing **Submit** in the top right-hand corner. The Assessment Data will then be submitted to Assessor hub and the rating and recommendations will be returned to Smart Survey.

If you wish to lodge the EPC you can do so by pressing **Lodge**. The app will instruct Assessor hub to lodge the EPC and upload your photographic evidence and confirm when this is complete.

If you are unable to lodge the EPC at this time, press **Upload Sitenotes**. This will upload the photographic evidence and the site notes to Assessor hub. This should be done if ever there is a delay between the Assessment and Lodging the report in order to protect your photographic evidence.
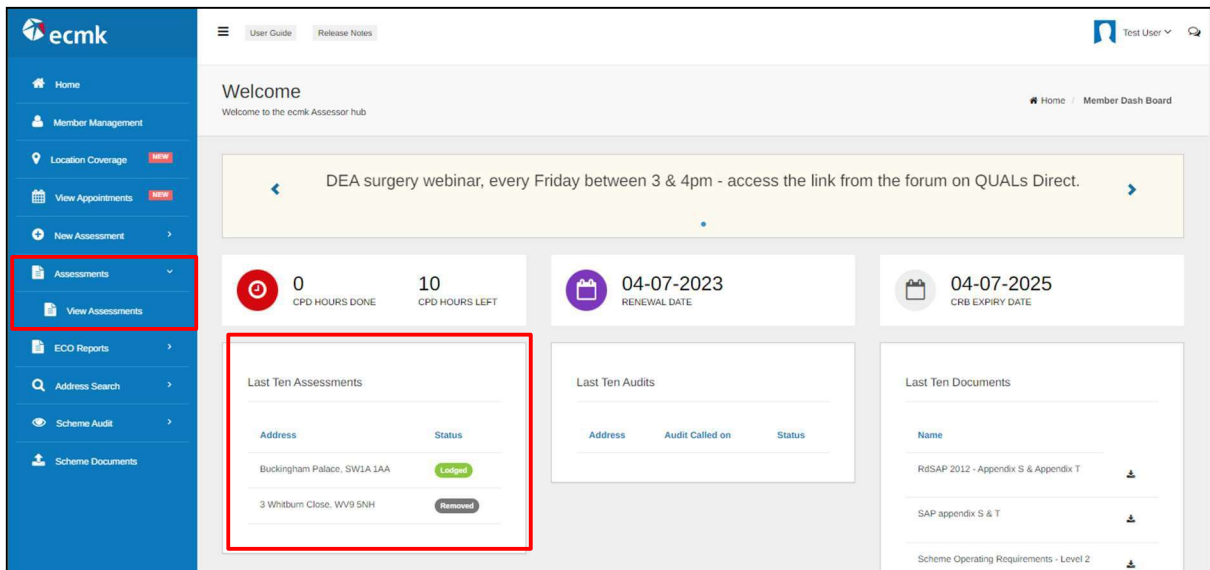
Until either **Lodge** or **Upload Sitenotes** has been pressed, the Assessment and its evidence are entirely stored on the device. **If anything happens to the device or the App is deleted, the evidence and the assessment would be lost.**

Once the Assessment has been lodged, it cannot be amended. The Assessment will appear as Read Only.

Viewing Assessment and Site Notes on Assessor Hub

Log into **assessorhub.net.** Your log in details will have been provided when you joined ecmk and are different from your Smart Survey log in details.
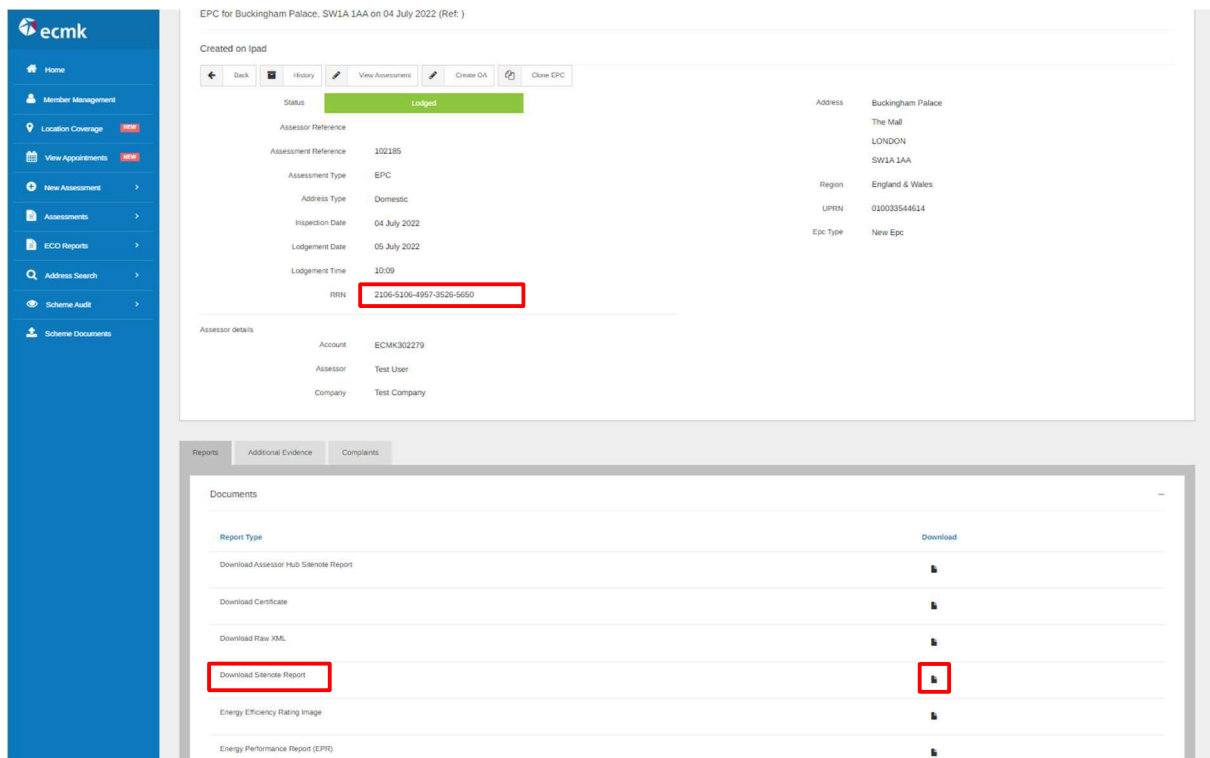
On the welcome screen you will see your dashboard where you will be able to see the last 10 Assessments and last 10 Audits. Alternatively, all assessments can be found by clicking **view assessment** on the left-hand side.

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Having clicked on the assessment, you will be able view the assessment, the certificate RRN and Download Sitenote Reports.

💡 If an assessment done on Smart Survey is called for audit, the site notes should be checked prior to the audit, in the rare event that there is an issue with site notes.

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