

# 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.

			Q Search for assessment
Status		Not Started	
Survey Status			Ŭ
Account			
Smart Property Assessment	0		
Smart Property Assessment	0		
B&Q	0		
EPC - Sava Test	0		
Timber & Damp	0		
Wolseley Green Deal	0		
Nes-One: Sava Live1	0		
Liam Mills	0		
SSE Property Assessment	0		
Willmott Dixon	0		
NPower Property Assessment	0		
Insta Group			
Home	Survey	<b>7</b> Diary	Settings

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.



			Q	Search for assessment
Status	<		Not Started Skip	Œ
Survey Status	Q SW1A 1AA		8	
Account	Eng & Wales	Scotland	N.Ireland	
Smart Property Assessment	102 Buckingham Pal	lace, LONDON, SW1A 1	AA102 Buckingham >	
Smart Property Assessment	Buckingham Palace.	The Mall, LONDON, S	W1A 1AABuckingha >	
B&Q	-		ConcessionThe Ma >	
EPC - Sava Test	Torrent and the second second at the second se		e, LONDON, SW1A >	
Timber & Damp			ham Palace, The M >	
Wolseley Green Deal	Refreshment Kiosk A	At Artillerv Memorial St	James's Park, The >	
Nes-One: Sava Live1			ON, SW1A 1AARoy >	
Liam Mills			te, LONDON, SW1A >	
SSE Property Assessment		,		
Willmott Dixon				
NPower Property Assessment	ECMK Test	t Assessor Hub -Admin Admin Test Company	Test Company	
Insta Group	0			
Home	Survey	Instructions	7 Diary	Settings

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.

Close	EPC RD SAP 9.94	0	General	Submit
102185	ngham Palace, SW1A 1AA	Inspection Date	>	Inspection Date
	General	Transaction Type	>	
	Not started	Tenure	>	Please be aware that lodgement will fail where the insp
	Building Construction O Not started	Type of Property	>	04/07/2022
	Building Measurement	Detachment Type	>	
	Roof Space	Number of storeys	>	
	Alternative Wall	Terrain Type	>	-
1		Number of Extensions	>	
	Openings & Ventilation	Electric Meter Type	>	
	Heating & Hot Water Started, not complete	ls mains gas available?	>	
	Conservatories	Select Measurements Location	>	
	Renewables	Confirm EPC check	>	
	Not started	Does an EPC exist?	>	
	Room Count Elements Started, not complete			
	Customer Response Started, not complete			Next

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.

Clos	EPC RD SAP 9.94		General		Submit
10218	tingham Palace, SW1A 1AA 5 >>	Inspection Date	04/07/2022	Photo of electric	ity meter
(i)	General Started, not complete	Transaction Type	Rental		
	Building Construction	Tenure	Rented Social	Photo Action	0 Photos
ft	Not started	Type of Property	House	Take Later	Not Applicable
***	Building Measurement	Detachment Type	Detached		
	Roof Space	Number of storeys	4 Storeys	Select	+ Add Photo
	Altornativo Wall	Terrain Type	٤	Select Photos	
		Number of Extensions	No E>		
田	Openings & Ventilation Not started	Electric Meter Type			
í	Heating & Hot Water	Photo of electricity meter	01		
HH	Conservatories	Is mains gas available?			
	Renewables	Select Measurements Location			
(1)	Not started	Confirm EPC check			
<b>?</b>	Room Count Elements	Does an EPC exist?			
<b>()</b>	Customer Response		External	0 Selected	Done

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.



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# 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.

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Clos	EPC RD SAP 9.94	0	Additio	nal Notes	Submit
10218	ingham Palace, SW1A 1A 5 Property Assessment) Not Submitt	Back Additional Notes S	AP Result	Additional Notes	
4	Roof Space Completed	SAP 60.00 D 78.00 C	ENV 46.00 E 69.		
	Alternative Wall Completed	Current	Current	tential	
田	Openings & Ventilation	Lodge	>		
í	Heating & Hot Water	Upload Site	enotes >		
	Conservatories Completed	Recommendations			
í	Renewables Completed	Flat roof or sloping ceiling insulation			
•	Room Count Elements Completed	Solar photovoltaic panels, 2.6 kWp	)		
<b>()</b>	Customer Response Completed				
411	Addendum + Related Part Completed				
<u>°0</u>	Photographs Required Completed				
Û	Additional Notes Completed	0			

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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🖗 ecmk	User Guide Release Notes		Test User Y
者 Home	Welcome		# Home / Member Dash Board
Ammber Management	Welcome to the ecmk Assessor hub		THORE / MONDOL DEBIT DOULD.
Location Coverage			
View Appointments	CEA surgery webinar, even	ery Friday between 3 & 4pm - access the link fro	om the forum on QUALs Direct.
New Assessment		•	
Assessments Y	0 10	04-07-2023	<u>м</u> 04-07-2025
View Assessments	CPD HOURS DONE CPD HOURS LEFT	RENEWAL DATE	CRB EXPIRY DATE
ECO Reports >			
Q Address Search >	Last Ten Assessments	Last Ten Audits	Last Ten Documents
Scheme Audit >	Address Status	Address Audit Called on Status	Name
Scheme Documents	Buckingham Palace, SW1A1AA Lodged		RdSAP 2012 - Appendix S & Appendix T
	3 Whitburn Close, WV9 5NH Removed		SAP appendix S & T 🛓
			Scheme Operating Requirements - Level 2

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.

ecmk	EPC for Buckingham Palace. SWIA JAA on 04 July 2022 (Ref. ) Created on Ipad	
🖶 Home	Back      Hotory     Vew Accessment     Create QA     Cone EPC	
Member Management	Salus Lodged	Address Buckingham Palace
Location Coverage	Assessor Reference	The Mail
View Appointments	Assessment Reference 102185	LONDON SWIA JAA
New Assessment	Assessment Type EPC	Region England & Wales
Assessments >	Address Type Domestic	UPRN 010033544614
ECO Reports >	Inspection Date 04 July 2022	Epc Type New Epc
	Lodgement Date 05 July 2022 Lodgement Time 10:09	
Address Search >	RRN 2106-5106-4957-3526-5650	
Scheme Audit		
Scheme Documents	Assessor details Account ECMK302279	
	Assessor Test User	
	Company Test Company	
	Reports Additional Evidence Compliants Documents Report Type	- Download
	Documents	
	Documents Report Type	Download
	Documents Report Type Download Cestificate Download Cestificate	Deventional
	Documents Report Type Downland Assessor Hub Stanvalle Report	Download
	Documents Report Type Download Cestificate Download Cestificate	Deventional
	Documents Report Type Downlaad Cestificate Downlaad Rew XMs.	Deventional L L L L L L L L L L L L L L L L L L L



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