
BULLETIN

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Welcome

Hello and welcome to the December edition of the ecmk Technical Bulletin. This month, we're bringing you a summary of important topics, including how to correctly record Hot Water Storage Losses, Smart Thermostats on the PCDB, guidance for Room-in-Roof and help on how to record Smart Meters. We also have an essential awareness update on the New BSI Standard (BS 40104?) for retrofit assessments, a reminder of the mandatory DBS Check requirement for Retrofit Coordinators and much more. Finally, after what seems like a year of extensive change in the industry, everyone at ecmk would like to wish you a wonderful festive season and a Happy New Year."



Ian Rowley, Scheme Manager, ecmk

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Meet one of the team

Peter Bloore

Role: Lead Auditor

Reporting to: Ian Rowley

Industry Experience:

Qualified back in 2012 on the eve of the Green Deal, I spent seven years in the field assessing and drawing floor plans for houses going on the market in Staffordshire, Shropshire, and the West Midlands. I completed around 7,000 EPCs during that time. I've seen most things, but not everything—recording a wind turbine still eludes me. My assessing highlights include a property best described as a castle and another that had its very own nuclear bunker.

Time with ECMK: 7 years

What do you love about your role:

I am passionate about energy assessments and the value they provide, as long as they are accurate and reliable. I love being able to use my experience and knowledge to help other energy assessors produce the best EPCs possible—whether that's working on the help desk, giving feedback on audits, or training the next generation of DEAs.

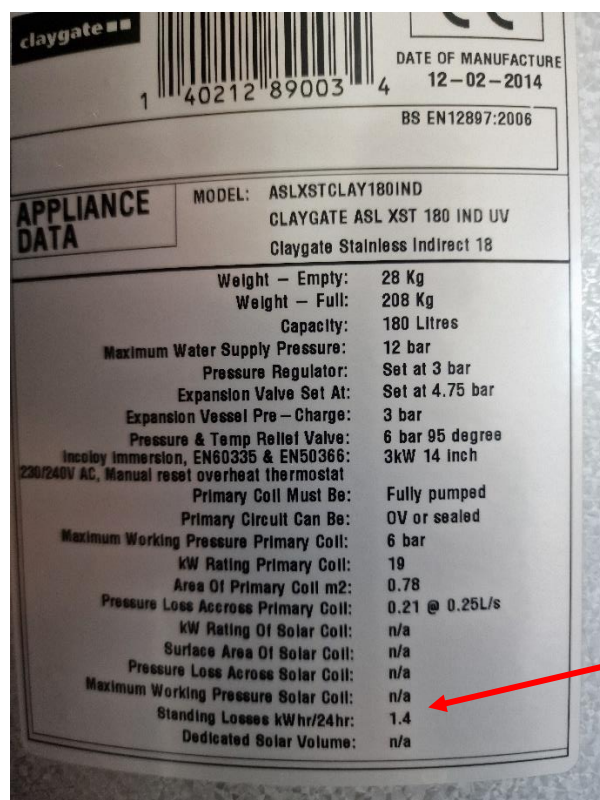
What do you find most challenging about your role:

The world of properties and energy efficiency is constantly evolving, with many new products coming to market all the time. Keeping up with these changes can be challenging when you are more office-based. This is why, when a member encounters something unusual, I'm keen to make it a learning experience for all of us so we can share and pass on that knowledge.



Hot Water Storage losses

We are finding common data entry errors when assessors record hot water storage losses in kWh per day. Typical standing losses for a hot water cylinder are around or below 2 kWh per day, with highly efficient modern units losing as little as 1 kWh per day.



Water Heating & Cylinder

* Water Heating Type	Regular
Water Heating System	From main heating 1
Cylinder Size	Large - greater than 170 litres
Cylinder Heat Loss Known	Yes
Cylinder Measured Heat Loss (kWh/day)	1.4
Has thermostat	Yes

This figure is influenced by factors such as the cylinder's insulation quality, size, and location, with older or poorly insulated cylinders having much higher losses. Please ensure that you enter the value in kWh per day (24 hours), as an incorrect entry in this section will significantly affect the SAP rating. Always check your data entry for any figure over 2 kWh per day.

Smart Thermostats on the PCDB

It is not currently possible to record a smart thermostat from the PCDB within RdSAP 10. This may change in the future, and members will be updated accordingly. At present, the only heating controls that support PCDB entry are Time and Temperature Zone Control (TTZC) and Weather Compensation.

Smart thermostats should not be recorded in RdSAP via the PCDB unless they meet the definition outlined in RdSAP Convention 4.17, as the smart thermostat option is intended for SAP assessments only. If a smart thermostat is recorded, it is treated as TTZC within RdSAP and must comply with the TTZC definition in accordance with Convention 4.17

Convention 4.17: Time and Temperature Zone Control (TTZC)

A system of controls that allows heating times of at least two zones to be programmed independently, as well as having independent temperature control. It includes wired or wireless remote or mobile control systems.



<input type="radio"/>	200115	Switchee Smart Thermostat	2nd gen	ErP Class IV control type 2	2015	2025	smart thermostat	0 - normal status for an actual product
<input type="radio"/>	200124	Switchee Smart Thermostat	2nd gen	ErP Class IV control type 3	2015	2025	smart thermostat	0 - normal status for an actual product
<input type="radio"/>	200125	Switchee Smart Thermostat	2nd gen	ErP Class IV control type 3	2015	2025	smart thermostat	0 - normal status for an actual product
<input type="radio"/>	200130	Radbot 1	SCV100	ErP Class VIII	2022	2025	time and temperature zone control	0 - normal status for an actual product
<input type="radio"/>	200131	Radbot 1	SCV100	ErP Class VIII	2022	2025	time and temperature zone control	0 - normal status for an actual product
<input type="radio"/>	200090	Radbot	2R	ErP Class VIII	2018	2025	time and temperature zone control	0 - normal status for an actual product

Room in Roof update- no recommendations for type 1 / type 2

Under RdSAP 10, Room-in-Roof (RinR) spaces are treated with greater detail, allowing assessors to enter specific insulation data for elements such as slopes, ceilings, stud walls, and gable walls. However, RinR entries classified as Type 1 or Type 2 in RdSAP software do not generate energy improvement recommendations. This is due to their structural design and assumed insulation characteristics.

Why no recommendations are generated:

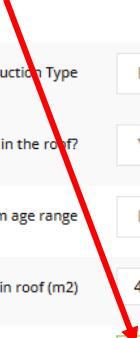
- **Type 1 RinR** refers to rooms fully constructed within the roof space, often with stud walls inside the common walls. These rooms typically have limited external exposure and are assumed to meet acceptable insulation standards.
- **Type 2 RinR** includes rooms partially integrated into the roof structure but still within parameters that suggest minimal heat loss. Insulation upgrades in these configurations generally offer negligible energy savings.

The software, following RdSAP 10 specifications, only suggests improvements where input data indicates substandard insulation or clear potential for enhancement. Since Type 1 and Type 2 entries rarely meet these conditions, no recommendations are produced.

* Roofs - Construction Type	Pitched Roof (Slates or Tiles), Access to Loft
Are there rooms in the roof?	Yes
Roof room age range	F: 1976 - 1982
Floor area of room in roof (m2)	40.00
Room in Roof Details Known	No
Room Roof Type	Please Select
Roofs - Insulation At	
Roof Insulation U-Value Known?	Please Select
	RR Type 1 (True RR)
	RR Type 2 (With the Accessible Areas of Continuous Common Walls)
Insulation Thickness (at Joists)	Please Select

This approach aligns with Convention 2.06 and RdSAP 10 guidance, which specify that Room-in-Roof (RinR) spaces must meet defined criteria such as having a common wall height of $\leq 1.8\text{m}$ for at least 50% of the wall to be classified as roof rooms rather than separate storeys.

To generate potential improvement recommendations, assessors must enter full insulation details for each RinR element instead of relying on Type 1 or Type 2 defaults. Providing detailed data to include U values enables the software to assess whether upgrades, such as additional insulation to slopes or ceilings, are technically feasible and beneficial.



* Roofs - Construction Type	Pitched Roof (Slates or Tiles), Access to Loft
Are there rooms in the roof?	Yes
Roof room age range	F: 1976 - 1982
Floor area of room in roof (m2)	40.00
Room in Roof Details Known	Yes
Gable Wall 1 Length (m)	
Gable Wall 1 Height (m)	
Do you want to enter insulation details?	Please Select
Gable Wall 2 Details Known	Please Select
Stud Wall 1 Details Known	Please Select
Slope 1 Details Known	Please Select

Getting smart with Smart Meters

RdSAP 10 introduced the ability to record whether a property's electricity and gas meters are smart. This information is collected for two reasons: firstly, to inform the government about how many properties have smart meters, and secondly, to display this information on the EPC as a piece of consumer guidance.

Smart meters

This property had **smart meters for gas and electricity** when it was assessed.

Smart meters help you understand your energy use and how you could save money. They may help you access better energy deals.

[Find out about using your smart meter](#)

As a result, stating that a property has smart meters when it does not—or vice versa—can lead to a misleading EPC and would cause the assessment to fail if audited.

Over the past six months, there has been some confusion about what is and what is not a smart meter. This article aims to clarify the differences between the various meter types. There are many different makes and models of meters, and the images below are by no means a complete representation of all those in use

Analogue electric meters

These meters were widely installed in properties up until the end of the 20th century. They have mechanical dials that rotate as electricity is used. Occupiers who still have such meters must submit meter readings manually to their supplier. If they have two sets of numbers, they are dual-rate meters. These meters are becoming an increasingly rare sight.



Digital Electric meters

These types of meters record electricity usage and display the reading on a digital screen. They may be either single-rate or dual-rate, depending on what they display. They either have a button to cycle through the rates or scroll automatically. These should not be confused with smart meters, as the presence of a digital display is the only similarity. Because this type of meter is not smart, the readings must still be submitted to the electricity supplier manually by the occupier or by a meter reader visiting the property periodically.



Pre-payment Electricity meters- Non smart or Smart meters

Unlike standard meters that record electricity usage for billing, pre-payment meters operate on a credit system. They dispense electricity until the purchased credit is used. Traditional pre-payment meters are typically topped up using a card or electronic key, which the occupier loads with credit at a local shop. These meters usually feature a slot for the card or key.

Pre-payment meters can also be smart meters. A smart pre-payment meter does not require a physical card or key; instead, the credit balance is displayed on the meter screen. Payments are generally made online, often through the utility supplier's app, rather than by loading credit onto a card or key.



Smart meters

First introduced in 2008, by the end of 2024 it is estimated that 64% of all homes and small businesses will have had a smart meter installed. What makes these meters “smart” is their ability to automatically send meter readings to the supplier as frequently as every half hour. This means readings no longer need to be submitted manually by the occupier and opens up the possibility of dynamic pricing based on grid demand.

At a glance, these meters look similar to digital meters; however, in most cases they are larger than non-smart meters and include a communication hub either attached to the meter or wired in separately. This is usually the top part of the meter with a yellow blinking light, which indicates the meter is sending readings back to the supplier. While digital meters typically have one button to cycle through the display, a smart meter often has two or more, allowing you to scroll through screens and interact with menus.





Home energy monitors

One of the advantages of having smart meters is that they can provide real-time information on the amount of electricity being used, displayed inside the home. Homeowners are not required to use a Home Energy Monitor with a smart meter—it is entirely their choice. As energy assessors, we do not need to see or record Home Energy Monitors; however, if you are in any doubt about whether a property has a smart meter, the presence of a Home Energy Monitor almost certainly indicates that it does.



Dual rate and Export Capable meters

Regardless of the type of electricity meter being recorded—whether non-smart or smart—it is important to establish whether the meter operates on a single rate or a dual rate. All meters should clearly display this information. Analogue meters will have two very obvious sets of dials displaying readings, while a digital meter will have a display that either scrolls automatically through readings or scrolls when a specific button is pressed. It can be slightly more difficult to identify dual-rate readings on smart meters, but usually one button is used to scroll through the different rates on the display.

There is a guide that Citizens Advice has put together which is very helpful.

How to read your Smart Electricity Meter

When trying to establish whether a meter is dual-rate, there is usually a reason why it is set up that way. For example, if the property has storage heaters or a dual immersion, it is likely to be on a dual-rate tariff. If there are no dual-rate appliances in the property, then there is no need for a dual-rate tariff, and it is likely to be single-rate—although the rate should always be checked by the assessor.

Recording export capability can be more challenging. Some smart meters will display an export or “EXP” reading, as shown in the photo to the right.

Smart meters are now in their second generation, and since 2018 all smart meters installed have been SMETS 2 (Smart Meter Equipment Technical Specifications). Prior to this, smart meters were SMETS 1. All SMETS 2 meters are export-capable, and most—but not all—SMETS 1 meters are also export-capable or can potentially be enabled by the utility supplier. If in doubt about the meter type or whether it is SMETS 1 or SMETS 2, research the meter model online.



Gas Meters

On the whole, gas meters are relatively straightforward to record; however, it is still important to identify whether a gas meter is smart or not.

Analogue Gas meters

Analogue gas meters, much like their electricity counterparts, have an analogue display. When it is time to submit a meter reading to the utility supplier, this is done manually by the occupier or a meter reader. These meters are not smart meters.



Prepayment gas meters

Modern pre-payment gas meters are often mistaken for smart meters because they have a digital display. However, the key difference is that pre-payment meters include a card slot for inserting the pre-pay card. These types of meters should not be recorded as smart meters.



Smart Gas Meters

When determining whether a gas meter is a smart meter, there are a few key points to consider. The meter will have a digital display, and—excluding pre-pay meters—there are very few non-smart digital gas meters. For a smart gas meter to transmit readings, it must use the communication hub attached to the electricity meter. Therefore, a smart gas meter can only function if there is a smart electricity meter. However, it is possible to have a smart electricity meter without a smart gas meter, often because the smart gas meter could not be installed due to its distance from the electricity meter.



To conclude, it is more important than ever to record electricity and gas meters accurately—not only their tariff type but also whether they are smart. As part of your assessment, you must gain access to these meters, both to inspect them and to confirm their type, as well as to obtain clear photographic evidence for your records. If in doubt, speak with the homeowner, as they should know whether they submit meter readings manually or if these are sent automatically. If this is still unclear, take clear photos and carry out online research.

Chimney and Flue Verification

Within RdSAP 10, we are now required to enter data for the following types of natural ventilation. **Please note: any room-sealed fanned flue or balanced flue is not included in the ventilation assessment.**

Open flues-



Could be an opening in fireplace where the heating has been removed and meets the definition of an open flue but is not large enough to be defined as an open chimney-maybe a flue liner is still in place.

An open fire where the definition does not meet the definition of an open chimney >200mm

Also, could be a vent that is larger than 30,000mm² (300x100mm) but is not an open chimney.

We don't include flues fixed to solid fuel boilers and room heater/fires, as they have a separate count.

Closed flues-

Chimney or flues attached to a closed fire



Boiler Flues-

Flues attached to a solid fuel boiler – NOTE- DO NOT include fanned flue or balanced flue boilers.

The count includes solid fuel boilers within the heated area of a dwelling being assessed.



Other flues-

Attached to other room heaters (does not include balanced or fanned flues)

Likely to be gas fires such as flush fitting live fuel effect or pre/post 1980 gas fires sealed to fireplaces. Could also be an older boiler with an open flue.



Note:

It is possible a property with no secondary heating and modern boiler would not need to have any of the above options included in the assessment.

Open Chimneys must have a diameter >200mm



Blocked Chimneys

Record if there is a ventilator with an area that does not exceed 30,000mm² (300x100mm)



Non-Domestic

Minimum evidence requirements

Back in **March 2024**, we issued detailed guidance on the **minimum evidence requirements for non-domestic audits**. Those requirements remain unchanged and continue to be essential for ensuring audit compliance. Given the significant increase in non-domestic membership over the past year, we feel it is important to revisit this message so that all assessors—new and experienced—are aligned with the audit requirements and standards expected by ECMK.

- **Most members are already providing the required information**, and we thank you for maintaining high standards.
- With many new assessors joining, it is vital to reinforce the importance of supplying evidence in the correct format and context.
- Failure to submit the minimum evidence requirements may automatically result in an audit fail.

Minimum Evidence Requirements (Summary)

Assessors must ensure that submitted evidence allows full verification of all data entry. This includes, but is not limited to:

- **Software data files** (NCT/DSB, matching the lodged EPC).
- **Site notes** (master copy available on Scheme Docs).

- **Floor plans** (clear, labelled, with orientation and measurements).
- **Photographic evidence** (labelled, location/date/time stamped, covering HVAC, lighting, construction types, windows/doors, and activities within zones).
- **Evidence of zoning** (zoning sheets or calculator from Scheme Docs).
- **Supplementary calculations** (boiler efficiency, frame factors, extract rates, storage losses, etc., where applicable).
- **Google Earth outline** of the building being assessed.

Full details and templates can be found on **ECMK Assessor Hub** under *Scheme Documents*.

Support and Queries

- Please ensure that all submitted evidence is clear, complete, and allows for verification of every data entry decision.
- If you are unsure about any requirement, contact the **Audit Team**—they are here to help and provide clarification.
- Remember: site notes and zoning sheets are not optional; they are essential for demonstrating your decision-making process.

The compliance message from March 2024 remains fully relevant today. By revisiting it now, we aim to support our growing membership and maintain the high standards expected of ECMK assessors. Consistency, accuracy, and verifiable evidence are the cornerstones of successful audits.

SBEM

- **Software Data File* (NCT FILE)**

SBEM Design Builder

- **Software Data File* (DSB FILE)**
- **Floor Plan(s) – Floor plan PDF can be downloaded from DSB**
- **Evidence of zoning**

GiSBEM

- **Software Data File* (NCT FILE)**
- **Floor Plan(s) – MPJ file not acceptable PDF required (screenshot and transfer to PDF)**
- **Geometry/ zoning - Supply GiSBEM report.**
- Please note- MPJ files will not be accepted for the floor plan and zoning data, the document must be provided in a PDF Supply GiSBEM report.
- **Software Data File* (NCT/DSB FILE)**
 - This **MUST** match the current lodged EPC on the register. You **MUST** also supply your new datafile file for any relodged assessments ready for Audit. Failure to submit new datafile will result in audit failure.

• Site Notes – (Master copy can be downloaded from Scheme Docs)

- **ALWAYS** use site notes
- Site notes enable you to quickly reference your data entry
- They also prove your decision making
- Enable you to make notes that can be referenced to your default decisions

HVAC										
Name	Description / Model	COP	SEER	EER	SFP	ECA	MRT	Controls	Zones	
AC	HAIER							LOCAL TIME/TEMP	20/02	
PANEL HTR	DIMPLEX							THERMO/PROG	20/02	

HWS							
Name	Description / Model	Post g8	Fuel	Efficiency	Storage	Insulation	Other info
INSTANTANEOUS	CORVELLE			1	X		
HOT	TRITON			1	X		
WATER	HEATRAE			1	X		

Extract Ventilation						
Description	Model	Zone	Ventilation Rates	SFP	Within / Remote	Other info
NONE						

Solar Energy System						
Description/Model	Which HWS	Area	Orientation	Inclination	Storage (Ltrs)	Other info
X						

Mark all relevant elements – also record additional notes where applicable

- **Floor Plan(s)**

Floor plans require the minimum below:

- Must be clean, clear, precise and easy to read
- Each Zone clearly labelled and activity clear
- Measurements for each zone
- Orientation clearly noted
- Windows and Doors









Each Zone clearly labelled and activity clear

Measurements for each zone

- **NOTE** the Audit team must be able to verify the gross internal area (GIA) from the floor plan so please ensure that the floor plan contains all the relevant dimensions

• Photographic Evidence

- A representative amount of photos are required to prove the model of the building/ the HVAC and the lighting requirements within the building.
- **MUST be labelled AND location/date/time stamped**
- Ensure that all photos are clear and are in context to prove the subject area
- Clear proof of all ID badges and Labels
- All external elevations
- All construction types internal and external
- All activities within zones
- HVAC, all elements, ID badges, labels and tech sheets- include controls
- Windows, doors and frame details
- All Lighting and controls per zone

IMG_0806	352 Kb	Photo	detail of double glazing showing makers information	Stewart King	04 April 2022 - 14:19		⊕
IMG_0802	297 Kb	Photo	warehouse roof with rooflights	Stewart King	04 April 2022 - 14:19		⊕
IMG_0829	209 Kb	Photo	warehouse roof	Stewart King	04 April 2022 - 14:19		⊕
IMG_0795	245 Kb	Photo	external wall detail	Stewart King	04 April 2022 - 14:19		⊕
IMG_0799	179 Kb	Photo	stores wall detail	Stewart King	04 April 2022 - 14:19		⊕
IMG_0792	206 Kb	Photo	External wall showing up officers below	Stewart King	04 April 2022 - 14:19		⊕
PML2201 - AS21 TOD	1940 Kb	Software Data File	.nct for ISBEM	Stewart King	04 April 2022 - 14:00	N/A	⊕
2510-1332-0532-2202-9002	329 Kb	Software Data File	.xml file	Stewart King	04 April 2022 - 14:00	N/A	⊕
2510-1332-0532-2202-9002	110 Kb	Other	Copy of the EPC	Stewart King	04 April 2022 - 14:00	N/A	⊕
PML2201 - AS21 TOD_Penillodge	1940 Kb	Software Data File	.nct for Pen & Lodge	Stewart King	04 April 2022 - 14:00	N/A	⊕

Ensure all Photos are labelled when submitted

• **Geometry/Zoning Sheets - On Scheme Docs/Zoning Data and Glazing Calculator**

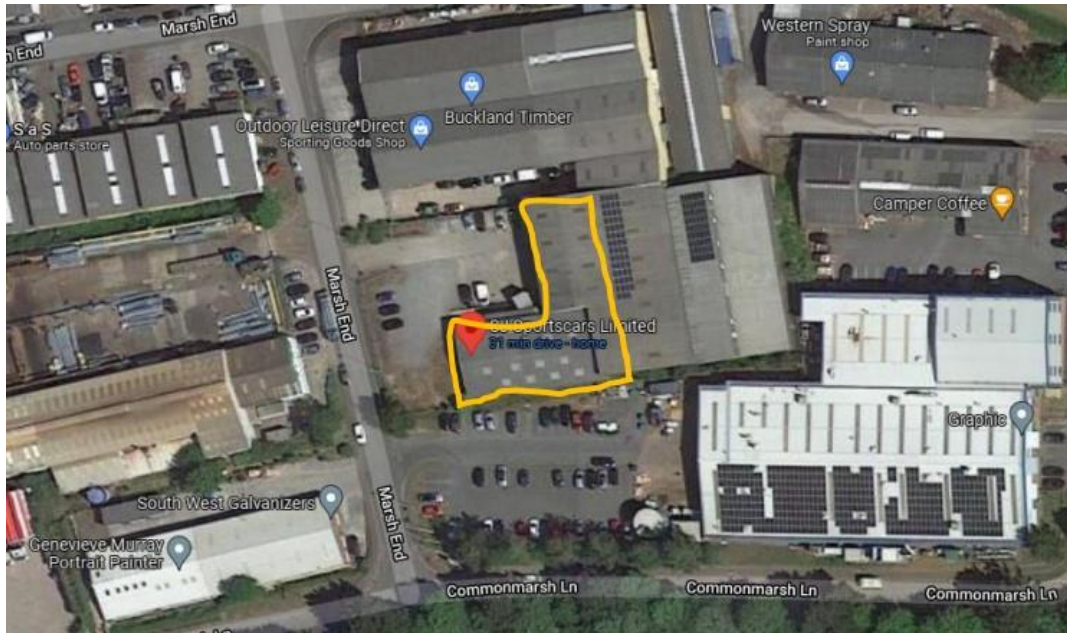
- Zoning sheets MUST be included to prove your data entry
- Written notes or zoning sheets are acceptable

6	Identifier	Zone Activity	area m2	Identifier	Adjacency	Construction	Length	Height	Envelope area m2	Gla	
7	Z0/01	Office A	79.170	z0/01/n	UAS	Timber	6.180	2.490	15.388		
8				z0/01/e	UAS	Timber	12.810	2.490	31.897		
9	HVAC & Lighting	Assumed Heating / LED		z0/01/s	EXT	Cavity	6.180	2.490	15.388		
10				z0/01/w	CAS	Timber	2.070	1.660	3.436		
11				z0/01/w.1	EXT	Solid	12.810	0.830	10.632		
12									0.000		
13									0.000		
14									0.000		
15									0.000		
16									0.000		
17									0.000		
18					z0/01/c	UAS	Timber Ins			79.170	
19			z0/01/f	UND	Solid			79.170			
20	Z0/02	Office B	26.05	z0/02/n	EXT	Cavity	3.090	2.610	8.065		
21				z0/02/e	UAS	Solid	2.250	2.610	5.873		
22	HVAC & Lighting	Electric Panel Heater / LED		z0/02/e.1	CAS	Solid	6.180	2.610	16.130		
23				z0/02/s	CAS	Solid	3.090	2.610	8.065		
24				z0/02/w	EXT	Cavity	8.430	2.610	22.002		
25									0.000		
26									0.000		
27									0.000		
28									0.000		
29						z0/02/c	UAS	Timber Ins			26.050
30					z0/02/f	UND	Solid			26.050	
31			Z0/03	Kitchen	10.30	z0/03/n	CAS	Solid	3.090	2.610	8.065
32			z0/03/e	CAS		Solid	3.560	2.610	9.292		
33	HVAC & Lighting	Assumed Heating / F	z0/03/s	CAS		Solid	2.110	2.610	5.507		
34			z0/03/s.1	CAS		Solid	0.980	2.610	2.558		
35			z0/03/w	CAS		Solid	0.710	2.610	1.853		
36			z0/03/w.1	EXT		Cavity	2.140	2.610	5.585		
37									0.000		
38									0.000		
39									0.000		
40									0.000		
41								0.000			
42					z0/03/c	UAS	Timber Ins			10.300	
43			z0/02/f	UND	Solid			10.300			
44				z0/04/e	CAS	Solid	2.110	2.610	5.507		


NOTE - Ideally use the 'Zoning Data and Glazing Calculator' above this document can be found in 'scheme documents' on your Assessor Hub and can be used to evidence all the zoning data as well as the requirements below.

- **Supplementary Evidence/Calculations (where appropriate)**

- Ensure to include Google Earth – AND outline of building being assessed



HVAC boiler efficiency

Boilers


Type	Index number	Status
Gas and oil fuel boiler	016212	Normal

Brand	Model name	Model qualifier
Ideal	Logic+ combi	24

Boiler ID*	47-348-65
Fuel	mains gas
SAP winter seasonal efficiency (%)	88.4
SAP summer seasonal efficiency (%)	87.3
Seasonal efficiency when used in non-domestic buildings	95.6
Comparative hot water efficiency (%)	69.3
Efficiency category	SEDBUK based on certified data
SAP equation used	104
Output power (kW)	24.2

- **Frame factors**

	A	P	Q	R	S	T
1						
2						
3	Window Reference	Glazing Area	Opening Area	Frame Factor	Aspect Ratio	
4	W1	0.723	1.075	0.328	1.453	
5	W2 & W3	2.353	3.338	0.295	0.468	
6	W4	2.113	3.338	0.367	0.468	
7	W6 & W7	0.460	0.599	0.232	1.911	
8	W5	0.794	1.113	0.286	1.404	
9	W8 x16 Rooflights	2.560	2.560	0.000	1.000	
10	W9 x8 Rooflights	2.000	2.000	0.000	2.000	

Frame factors **MUST** be completed in accordance with convention 3.03

NOTE - Ideally use the '**Zoning Data and Glazing Calculator**' above this document can be found in 'scheme documents' on your Assessor Hub and can be used to evidence all the zoning data as well as the requirements below.

New BSI Standard: Essential Awareness of the New BS 40104 Retrofit Assessment Standard

What Does the new standard Mean?

This technical bulletin provides our members with an important update on the impending British Standards Institution (BSI) publication, BS 40104:2025 *Retrofit assessment for domestic dwellings – Code of practice*.

BS 40104 is a new British Standard designed to formalise and standardise the way domestic properties are assessed prior to retrofit work. It is intended to complement the existing PAS 2035 framework by providing a more detailed and rigorous methodology specifically for the assessment phase. The standard aims to improve the quality and consistency of retrofit projects across the UK, which is vital for meeting national carbon reduction targets and ensuring occupant well-being.

The standard introduces a comprehensive, "whole-dwelling" approach to assessment, which goes beyond the traditional energy performance evaluation.

What BS 40104 Means for Assessment

BS 40104 mandates a detailed and structured assessment process covering several key areas:

- **Context Assessment:** A thorough desktop review of the site, dwelling characteristics, constraints (e.g., planning, site access), and environmental factors.
- **Condition Assessment:** A rigorous on-site evaluation of the physical state of the building fabric and systems, including identifying defects like damp, mould, or structural issues.
- **Ventilation Assessment:** A comprehensive check of existing ventilation systems to ensure a healthy and safe post-retrofit environment.
- **Occupancy Assessment:** An in-depth consideration of how the home is actually used, including occupant patterns, well-being, and energy usage data, which can influence energy performance calculations.
- **Energy Performance Assessment:** The use of standardised models (like RdSAP/SAP) to establish a baseline and model the performance of potential measures, often incorporating a methodology to account for occupancy data.
- **Site-Specific & Significance Assessment:** Identification of any local factors or heritage/architectural importance that must be considered in the retrofit design.

In essence, the standard elevates the professionalism and technical detail required in the pre-retrofit assessment, aiming to prevent poorly designed work that could lead to unintended consequences.

ECMK's Position:

We understand that the industry has had to manage several significant changes this year, including the transition to RdSAP 10. Our primary goal in this article is to ensure our members are aware of BS 40104 as a key development in the wider UK retrofit framework, and to help you understand its importance to the assessment part of the PAS 2035 process.

Please do not be alarmed. This is a significant standardisation effort for the industry's benefit, but we are issuing this bulletin to keep you informed about its existence and implications for the future of domestic retrofit assessment. It is also important to note that ECMK will not be auditing to the standard of BS 40104, until the standard is fully implemented as the required standard for Retrofit Assessments.

Important Note Regarding ECMK Software Support

We would like to provide a clear note regarding our technical platform.

ECMK software, including any of our current lodgement platforms, will not support the direct data input or complex methodologies required by the new BSI standard BS 40104 at this time.

The additional depth of detail required for the Condition, Ventilation, and Occupancy Assessments is substantially beyond the scope of existing energy assessment software and typically involves separate reporting and specialised tools used by the Retrofit Assessor.

As the industry and certification bodies determine the full implications and required tools for compliance, ECMK will continue to monitor the situation. However, members should be aware that compliance with the full *process* of BS 40104 may necessitate the use of external, specialised software/tools and new working practices separate from your existing ECMK/cotality provided assessment software.

Maximise Efficiency and Value: Lodge All Your Strands with ECMK

As valued members, particularly those leading the charge in the UK's retrofit sector by lodging Retrofit Assessments with us, we want to address a key opportunity that can significantly simplify your professional life and reduce your overheads.

We have noted that some of our Retrofit Assessors, while using ECMK for their critical PAS 2035 work, lodge their Domestic (DEA) and Non-Domestic (NDEA) EPCs with other schemes. While the choice is ultimately yours, we strongly encourage you to consolidate all your accreditation strands under the ECMK umbrella to unlock significant benefits in efficiency, cost, and support.

The Power of Consolidation: Lodging All Strands with ECMK

By bringing your Domestic EPC, Non-Domestic EPC, DEC, and other assessment strands across to ECMK, you move from managing multiple schemes to a single, unified professional home.

1. Streamlined Administration & Support

- **Single Point of Contact:** Instead of calling different helplines for EPC queries versus Retrofit Assessment queries, you have one dedicated ECMK Technical Support team who understands your full professional scope.
- **Assessor Hub:** Manage your CPD, scheme documents, certificates, and audits all through a single, secure Assessor Hub account. This saves significant time otherwise spent navigating multiple scheme portals.
- **Integrated Software Access:** Our members benefit from free access to market-leading software for both Domestic EPCs (Smart survey App) and Retrofit Assessments (Cotality Assess+ App and PAS Hub). Using one ecosystem often means smoother data flow between the different assessment types, which is essential for comprehensive retrofit work.

Competitive and Transparent Lodgement Costs

We appreciate that cost is a major factor. ECMK has worked hard to ensure our lodgement fees are not only competitive but consistently offer excellent value, especially when compared to other schemes.

Assessment Strand	ECMK Lodgement Fee (Excl. Central Register Fee/Insurance*)	Potential Comparative Fee**
Retrofit Assessment	£5.00	Varies, e.g., similar to Energy/Condition Report fees
Domestic EPC (RdSAP)	£3.49	£5.60 - £5.77
Non-Domestic EPC	£11.75	Varies by scheme/level

* ECMK's fees are highly competitive. We offer a pay-per-click Professional Indemnity and Public Liability insurance option, ensuring you only pay for the cover you use when you lodge.

** Based on recent market comparison information from other major accreditation schemes.

3. Simplified CPD Management

- Free CPD Hours: All ECMK members receive 4 hours of FREE online CPD every year.
- Structured Requirement: While multiple strands require additional CPD hours (typically an extra 5 hours per additional strand), managing this through one scheme means you are less likely to miss mandatory requirements and can often use the same training courses to count toward multiple strands' knowledge requirements.

Take the Next Step

Consolidating your accreditation with ECMK is not just a commercial decision; it's a choice for efficiency, simplicity, and superior, integrated support. By unifying your services, you can spend less time on administration and more time delivering high-quality assessments for your clients.

We are here to help you make the move.

Important update from TrustMark - EPR Conventions & RdSAP Transition

The EPR Conventions Working Group, comprising TrustMark, Ofgem, Retrofit Assessment Scheme Providers (ECMK, Elmhurst, Quidos, Sterling), and wider industry stakeholders has updated the Energy Performance Report (EPR) Variation Convention to reflect the transition from RdSAP 9.94 to RdSAP 10.

These changes will apply to new projects with Retrofit Assessments conducted on or after 10th November 2025.

Key updates include revised requirements for the pre- and post-installation

recording of ventilation, aligned with the latest ECO4 and GBIS regulations. These changes are designed to ensure consistency, compliance, and improved quality across retrofit assessments.

We strongly encourage all assessors to familiarise themselves with the updated conventions to ensure readiness ahead of the implementation date.

Ventilation Upgrades

Where ventilation in a property has been upgraded as a part of the project, then the updated ventilation system must be reflected in the post EPR, even though Ventilation is not an ECO4/GBIS eligible measure.

Air Tightness Testing

All airtightness testing must be conducted by an appropriately trained Level 1 or Level 2 airtightness tester who is registered with a government-approved Competent Person's Scheme.

The testing itself must be carried out using calibrated equipment in accordance with CIBSE TM23. The building preparation and testing procedure to be used is also detailed in CIBSE TM23.

For an airtightness test to be valid and used within an RdSAP lodgement, it must be lodged to the registered Competent Person's Scheme, with the resultant certificate provided as documentary evidence for audit purposes.

Can I use an air tightness test in the Pre-Installation Retrofit Assessment (EPR) and not have an air tightness test in the Post installation Retrofit Assessment (EPR) or vice-versa?

No. If you use an airtightness test in the pre-installation Retrofit Assessment (EPR), you must use an airtightness test throughout the project. You cannot mix and match.

Mandatory Basic DBS Check Requirement for Retrofit Coordinators

Effective from 1st January 2026, a valid Basic Disclosure and Barring Service (DBS) check will be mandatory for all individuals joining or renewing their accreditation membership as a Retrofit Coordinator. See key dates below:

Key Implementation Dates:		
Member Status	DBS Requirement Effective Date	Action Required
New Applicants	As of 1st January 2026	Must upload a DBS certificate into Assessor Hub, for your initial membership application
Existing Members	On your first membership renewal date occurring after 1st January 2026	Must upload a valid DBS certificate into Assessor Hub, as part of your renewal process*

**If you are an existing DEA or RA, we may already hold a DBS on file.*

This decision has been made in line with industry best practice and to ensure all professionals operating under our scheme meet the safeguarding and suitability standards when working with homeowners and in various domestic settings.

Need more info?

For additional information on our requirements for a DBS, please refer to the [DBS Checker Document](#) also located within **assessor hub > scheme documents**.

Site visit requirements reminder for Retrofit Coordinators

ECMK would like to take this opportunity to remind Retrofit Coordinators of the site visit requirements for high-risk measures since the implementation PAS 2035:2023.

This document link below details the responsibilities and requirements for an RC and other qualified professionals during site visits for works undertaken in accordance with PAS 2035:2023.

Site visit [requirements](#)



Christmas support opening hours

ECMK Accreditation and Auditing will be closed over Christmas period (**24th Dec until 2nd Jan**), however should members require **Software Application Support**, they can call the ecmk number 0333 123 1418 select option 3 and get through to one of the Tech Support Team.

Technical Support opening hours are as follows:

- Monday 22nd December – 8am – 8pm
- Tuesday 23rd December – 8am – 8pm
- Wednesday 24th December (Christmas Eve) – 8am – 1pm
- **Thursday 25th December (Christmas Day) – Closed**
- **Friday 26th December (Boxing Day) – Closed**
- **Saturday 27th December – Closed**
- **Sunday 28th December – Closed**
- Monday 29th December – 8am – 8pm
- Tuesday 30th December – 8am – 8pm
- Wednesday 31st December (New Years Eve) – 8am – 1pm
- **Thursday 1st January (New Years Day) – Closed**
- Friday 2nd January – 8am – 8pm

Email support@ecmk.co.uk or call **0333 123 1418** (select option 3)

SMS reminders for members

As previously communicated with members. we're introducing SMS text messaging to contact members on important reminders.

Initially, we'll use text messages to follow up on missing audit evidence and eventually for membership renewal reminders too. **Please ensure your mobile number is up to date.**

Upcoming training

ABBE Level 3 DEA + Level 3 Retrofit Assessor Course

Through the Government's Warm Homes Skills Programme (WHSP), ECMK is offering part-funded retrofit training. This training provides industry-recognised qualifications for those looking to enter or upskill in the retrofit sector, making it great for existing ECMK accredited Retrofit Coordinators looking to complete additional qualifications, as well as employers looking to train new staff or apprentices. *(Must be over the age of 18, living in England)*

£1,254 (incl. VAT) *SAVING £836*

- Monday 15 December – [more info](#)
- Monday 19 January – [more info](#)
- Monday 9 February – [more info](#)



**Part-funded
Retrofit training
available**

ABBE Level 3 DEA + Level 3 Retrofit Assessor Course
£1,254 (incl. VAT) SAVING £836 (7 days + self-study)

**WARM
HOMES SKILLS
PROGRAMME
(WHSP)**

ecmk

**MIDLANDS
NET ZERO HUB**

UK Government

[More](#)

Have you claimed your free CPD?

Don't forget we offer ecmk members 4 hours free CPD every year to help you upskill and work towards your required hours for your accreditation. Call us on **0333 123 1418 (opt 4)**.



December CPD Sessions ‘Live online’

Course	Duration	Date	Cost (+VAT)
DEA Bootcamp – Refresher Upgraded Properties	4 hr	3 Dec	£50
External Wall Insulation (EWI) Best Practice	2.5 hrs	4 Dec	£65
Heating Primary	1 hr	5 Dec	£25
Water Heating	1 hr	5 Dec	£25
Advanced Heating	1 hr	8 Dec	£25
PAS Condition Report and Understanding Defects	1 hr	9 Dec	£25
DEA Bootcamp – Refresher Measuring & Modelling	4 hr	10 Dec	£50
Internal Wall Insulation (IWI) Best Practice	3 hrs	10 Dec	£65
Lighting and Storage Heaters	1 hr	10 Dec	£25
Heat Pumps and Renewables	1 hr	12 Dec	£25
Ventilation for RdSAP10 Assessments	1 hr	12 Dec	£25
Mini Audit – DEA Tips and Hints – How Not To Fail	1 hr	15 Dec	£25
Under Floor Insulation (UFI) R. Coordinator	1 hr	16 Dec	£25
Walls – Construction, Party & Alternative	1 hr	18 Dec	£25
Rooms in the Roof	1 hr	91 Dec	£25
Evidence Photographs and Documents	1 hr	22 Dec	£25

For further information, more course dates and to book your place: [click here](#). Alternatively, email support@ecmk.co.uk or call **0333 123 1418 (opt 4)** and tell us what you’d like to book.

[Book training](#)

****Claim 1 hour CPD for reading this Technical Bulletin****

Once you have read this technical bulletin, please upload a copy of your notes to Assessor Hub, under the 'CPD and Training' tab to claim 1 hour CPD, as below.

The screenshot shows the 'Create New CPD' form in the Assessor Hub. The form is titled 'New CPD' and includes the following fields:

- Training Provider: ecmk
- Course Id: (empty)
- Course Name: CPD - Reading - ecmk Tech Bulletin (September 2022)
- Qualification Type: DEA
- Hours: 1
- Reason For Course: Other Professional Development
- Date Attained: 06/09/2022

The 'Choose Files' button for uploading evidence is circled in green. Below the button, the text 'Evidence - Notes taken from T8 Sept 2022.docx' is visible.

For further details about claiming CPD – read our [blog](#).