

# **Energy Performance Report (EPR) Variation Conventions**

**For use in Energy Company Obligation  
(ECO4) & The Great British Insulation  
Scheme only**

**V1.3**

## Energy Performance Report (EPR) Conventions for use in Energy Company Obligation (ECO4)/Great British Insulation Scheme (V1.3)

This document contains conventions applicable to the production of EPRs, via an RdSAP calculation specifically for the purposes of an ECO4/Great British Insulation Scheme Project. They must not be used in the production of any Energy Performance Certificate (EPC) or for any EPC related purpose. This specifically includes that they must not be applied in any pre or post ECO4/Great British Insulation Scheme EPC. All EPCs, and all EPRs for EPC related purposes, must be produced entirely in accordance with the current government approved RdSAP conventions.

Issue date marked with \* (e.g. amended 31 Oct 2022\*) indicates that some paragraphs were deleted from a convention.

Amended and additional conventions (future versions) are indicated **by light blue background**, and changes in the wording in this version **are marked in red**.

This edition of the ECO4/Great British Insulation Scheme variation Conventions supersedes all previous editions and, where any Convention is in conflict with the published PAS2035 specification, these Conventions take precedence. For any purpose other than ECO4/Great British Insulation Scheme, these variation conventions do not apply and the PAS2035 specification and RdSAP conventions must be followed.

### Document Ownership

This document is owned by TrustMark. This document is managed on behalf of TrustMark by the Retrofit Assessment Working Group.

The Retrofit Assessor Working Group (WG) will:

- Meet every 3 months to review the Conventions document and consider any new conventions and updates that may be required, and
- be made up of all TrustMark Retrofit Assessor Scheme Providers, TrustMark and other key stakeholder representatives and will have a rotating nominated chair.

The document will be released regularly and must be signed off by TrustMark and officially issued to stakeholders in advance of a nominated application date. After this date, the conventions should be applied where necessary.

#	Topic	Conventions	Issue date
<b>1. General Conventions</b>			
1.01	Non-ECO Measures	<p>These are not to be included in the post-install RdSAP (EPR) calculation and resultant XML.</p> <p>For clarity, the only changes to the post-install XML should be measures installed via ECO project, unless allowed and detailed within this conventions document.</p> <p>Examples are but not limited to;</p> <ul style="list-style-type: none"> <li>• Low energy lighting added between pre and post-Assessment</li> <li>• Additional items for heating system that are not required to meet the building regulations</li> <li>• Building dimensions changing between pre and post assessment</li> </ul>	July 2022
1.02	Validity Period of Assessment	<p>The maximum time between assessment date and project <b>creation (or lodgement of the assessment in a created project) within the Retrofit Portal</b> is <b>12 months</b>. Conditions on that acceptance are;</p> <ul style="list-style-type: none"> <li>• there is no change from the stated condition in original report,</li> <li>• there is no change in tenancy</li> <li>• there is no material change to the property that invalidates the data within the assessment</li> </ul> <p>Should any of the above change, a re-visit to property and re-assessment will be required. New evidence must be gathered.</p>	<b>18<sup>th</sup> March 2025</b>



#	Topic	Conventions	Issue date
<b>2. Fabric Elements</b>			
2.01	Overridden default u-values	<p>Overridden u values <b>will not be accepted</b> as permissible, unless via prior agreement with the scheme provider on receipt of suitable confirming validated evidence.</p> <p>Where agreement is provided, the post equivalent u values in the post EPR must be calculated based on the u value of the pre EPR and the thermal resistance of the insulation product installed.</p> <p>Any lodged (including a pre or post ECO4/Great British Insulation Scheme) EPC must revert to applying the conventions in the RdSAP Conventions document (Conventions 3.08 and 9.02).</p> <p><b>Competency requirements for the production of u-values:</b></p> <p>U-value calculations should only be produced and verified by a person with suitable expertise and experience.</p> <p>Evidence of suitable expertise and experience can be demonstrated by, but is not limited to, membership of a recognised U-value calculation competency scheme or OCDEA or Level 4 Non-Domestic energy assessor (NDEA) membership, or any other process recognised by Accreditation Schemes/Approved Organisations and Government.</p>	1 <sup>st</sup> February 2023
2.02	Cavity Wall Insulation (CWI) extraction and replacement	<p>If defective cavity insulation is suspected, following evaluation by a suitably qualified professional as set out in out in chapter 4 of the ECO4 Delivery Guidance (subsection Extraction of pre-existing insulation) that supports doing so, Insulation Extraction must take place and appropriate photographic and documentary evidence is obtained before RdSAP data is finalized for project creation (start date). Any questions in regard to the ECO4 criteria or the suitability of evidence can be directed to Ofgem.</p>	1 <sup>st</sup> April 2023



#	Topic	Conventions	Issue date
2.03	No Loft Access	<p>Lofts should always be accessed and insulation levels recorded and evidenced.</p> <p>The use of 'no loft access' or 'loft access, unknown insulation' is not permissible.</p> <p>If on initial inspection, a loft cannot be accessed, arrangements must be made to access the loft and a re-visit to the property is required to update the pre-project assessment.</p>	1 <sup>st</sup> February 2023
<b>3. Heating and Hot Water Systems</b>			
3.01	Heating System Upgrade, where the upgrade includes water heating system and/or heating control changes	<p>Where required by the <b>project</b> and by building regulations, for example the addition of a new cylinder <b>thermostat</b>, or additional heating controls, any new or additional measures can be included in the post-install RdSAP XML and allowed to contribute to scoring.</p> <p>However these measures cannot be scored <b>unless part of the installation of an</b> ECO applicable heating system measure <b>within the project</b>.</p>	1 <sup>st</sup> February 2023
<b>4. Report Data</b>			
4.01		A lodgement of any report (pre and post EPR or Retrofit Assessment) to the TrustMark <b>Retrofit Portal</b> is confirmation that the data entered into the report is accurate and is not a misrepresentation of the property or the features.	
<b>5. Technical Considerations</b>			
5.01		<p>For avoidance of doubt, the term of RdSAP assessment used in this document may also be referred to as an EPR (Energy Performance Report). These are not to be confused with EPCs <b>to which the conventions in this document do not apply</b>.</p> <p>An RdSAP assessment must be lodged on the <b>Retrofit Portal</b> and the XML file as generated by the approved RdSAP engine must be provided as part of the lodgement. Validity of the XML file will be quality assured by TrustMark and the Accreditation Scheme.</p>	



#	Topic	Conventions	Issue date
<b>6. Miscellaneous</b>			
6.01		None	

**Revision history**

14/11/2022	First issue Conventions: 1.01, 1.02, 2.01, 2.02, 2.03, 3.01, 4.01, 5.01
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