



TRUSTMARK
Government Endorsed Quality



Warm Home Discount Scheme Requirements for TrustMark Scheme Providers

V1.1

This document must be read and used in conjunction
with the current version of the TrustMark Framework
Operating Requirements

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Foreword

The Warm Home Discount Scheme Extension 2022/2026

Since inception in 2005 TrustMark has been instrumental, along with our Scheme Providers, in enhancing levels of consumer protection in a range of industry sectors.

In line with the overarching direction of government policy ambition that energy efficiency measures installed under government schemes will be carried out by TrustMark Registered Businesses, or equivalent, the 2022/2026 extension to the Warm Home Discount Scheme (WHD)¹ includes the requirement that boilers and central heating systems installed and repaired under the scheme are carried out by a TrustMark Registered Business and work must be lodged into the TrustMark Data Warehouse.

The WHD is a government scheme for England, Scotland and Wales that supports low-income households with heating their homes. The Government response to the consultation on Warm Home Discount: better targeted support from 2022 sets out more details about the wider Scheme and changes for the 2022/2026 extension.²

This document sets out defined Framework Operating Requirements that apply for boiler and central heating system installations and repairs delivered under the WHD 2022/26 extension (“the Warm Home Discount Scheme Requirements”). This document must be read and used in conjunction with the current version of the TrustMark Framework Operating Requirements.

¹ <https://www.gov.uk/the-warm-home-discount-scheme>

² <https://www.gov.uk/government/consultations/warm-home-discount-better-targeted-support-from-2022>

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The Framework Operating Requirements

3.1 The Framework Operating Requirements:

3.1.1 The Warm Home Discount Scheme Requirements for TrustMark Scheme Providers must be read and used in conjunction with the current version of the TrustMark Framework Operating Requirements (FOR) and any scheme requirements set by BEIS and/or Ofgem.

The following sections from the FOR, with their principles and Scheme Provider responsibilities, will remain uniform in the delivery of boiler and central heating system installations and repairs under the WHD 2022/26 extension, except where provided for otherwise in the Warm Home Discount Scheme Requirements:

- 04. Scheme Provider Application & Registration
 - 05. Standards & Competency
 - 06. Audit & Compliance
 - 07. Enforcement & Sanctions
 - 08. Dispute Management
 - 09. Consumer Safeguarding
 - 10. Financial Protection
 - 11. Brand Governance
 - 12. Communications
 - 13. Assessment & Design
 - 14. Monitoring & Evaluation
 - 15. Product Suitability
 - 16. Data & Information Sharing
 - Annex A – Applicant & Registered Business Requirements
 - Annex B – Energy Efficiency
 - Annex C – Requirements for Energy Assessors, Retrofit Assessors and Retrofit Coordinator Scheme Providers
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04

Registered Business Eligibility

4.1 Registered Business Eligibility³:

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| 4.1.1 | Installations deemed to be higher technical risk as referenced in 5.1.2 must be installed as per the requirements of 5.1.2. |
| 4.1.2 | Work in relation to central heating systems must be installed as per the requirements of 5.1.1. |
| 4.1.3 | Financial protection must be provided for all works installed under WHD. The financial protection mechanism must meet all the requirements of the TrustMark FOR – Section 10; and be declared within the Data Warehouse. |
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4.2 Scheme Provider Requirements:

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| 4.2.1 | To ensure that all data submitted for Registered Businesses is accurate including, but not limited to, PAS certification and registered trade scope, and business details. |
| 4.2.2 | To ensure that Registered Businesses working within WHD are aware of the necessity of lodgement into the TrustMark Data Warehouse. |
| 4.2.3 | Measure the compliance of their Registered Businesses with the TrustMark requirements and manage identified non-compliance. |
| 4.2.4 | Scheme Providers who are not UKAS accredited Certification Bodies but wish to offer TrustMark registration for PAS / MCS certificated trades, must have an evidenced formal arrangement with a Certification Body(ies) in order that PAS / MCS scopes, assessments and certification can be validated and kept synchronised with the Certification Body. |
| 4.2.5 | Scheme Providers who are a UKAS accredited Certification Body and wish to offer TrustMark registration to businesses certified by another UKAS accredited Certification Bodies must have an evidenced formal arrangement with the relevant Certification Body(ies) in order that PAS / MCS scopes, assessments and certification can be validated and kept synchronised with the Certification Body. |
| 4.2.6 | Scheme Providers accept responsibility for the standards of delivery of their Registered Businesses and must ensure that technical, procedural, registration/certification and financial protection requirements are monitored, and any identified non-compliance is remediated. |
| 4.2.7 | Scheme Providers will as part of the FOR undertake investigations and seek resolution for any disputes between the consumer and the Registered Business. |
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³ The FOR makes requisites of registration under government authorised/licenced schemes and existing recognised schemes.

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Installation Standards

5.1 Scheme Providers:

- 5.1.1 For central heating systems installed under WHD that are referred to in PAS, Scheme Providers will be required to ensure, and be capable of evidencing, that Registered Businesses are:
- a) certified as compliant with PAS 2030:2019 by a PAS 2031:2019 accredited Scheme Provider/Certification Body; and
 - b) compliant with both PAS 2030:2019 and PAS 2035:2019.
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- 5.1.2 For boilers installed in higher technical risk properties under WHD and that are referred to in PAS or MCS standards, Scheme Providers will be required to ensure, and be capable of evidencing, that Registered Businesses are:
- a) certified as compliant with PAS 2030:2019 by a PAS 2031 accredited Scheme Provider/Certification Body; and
 - b) compliant with both PAS 2030:2019 and PAS 2035:2019
 - c) certified as compliant with the applicable MCS (MIS) standard by an ISO 17065 accredited Scheme: and
 - d) complaint with both the applicable MCS (MIS) standard and PAS 2035:2019.

The significant technical risks associated with park homes, high-rise buildings, and any building that is **both** traditionally constructed and protected will render them unsuitable for the delivery under PAS 2030:2017; therefore, the PAS 2035:2019 route must be adopted - this will ensure a TrustMark Retrofit Coordinator is used for the duration of the installation project.

Due to the nature of the construction, park homes can be more effectively treated under PAS 2035:2019 on the basis of the construction type and applicable measures. By their very nature park homes would exponentially benefit from the whole house fabric first approach, the whole dwelling receiving the most up to date and effective treatment from professionals.

Any risks associated with high-rise structures must be removed from the process and managed through the recognised planning requirements alongside the application of the higher-risk review process.

The PAS 2035:2019 approach defines an elevated level of competence and qualification that is required to assess and determine the correct technical measures that are appropriate for buildings that are **both** traditionally constructed and protected for the building.

If additional technical support is required to understand what is needed to meet those requirements, PAS 2030 certified installers should seek support from their Certification Body and/or the Retrofit Coordinator with responsibility for the project.

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Data Warehouse Lodgement

6.1 Lodgement of Measures:

- 6.1.1 Installations and repairs of boilers and central heating systems delivered under WHD must be carried out by TrustMark Registered Businesses and lodged by the installing business; or a TrustMark Registered Retrofit Coordinator, as required (see 5.1.2 and 5.1.3)
- 6.1.2 Installations and repairs of boilers and central heating systems delivered under WHD will require lodgement within the TrustMark Data Warehouse. Businesses are encouraged to make lodgement as soon as practicable after the handover date of the installation. Lodgement will not be possible after 30 calendar days of the installation handover date.
- 6.1.3 The WHD lodgement fee is £30.00 + VAT, this includes the cost of the TrustMark post completion quality assurance audits.

6.2 Lodgement Evidence in the Data Warehouse

- 6.2.1 The following evidence will be required for lodgement of WHD measures (PAS2035:2019 follows the existing process):

Document	Warm Home Discount			Notes
	Gas Safe / CPS etc <i>(Non-PAS, lower technical risk properties)</i>	PAS2030:2019 / MCS MCS & PAS 2035 <i>(Central heating in all properties and boilers in higher technical risk properties)</i>	PAS2035:2019 / MCS <i>(Lower technical risk properties)</i>	
Advice report		O		May contain condition report, occupancy data
Risk Assessment		Y		
Intended Outcomes		Y		
Assessment Report		Y		Can include RDSAP, SAP, PHPP & Photos
Retrofit Design		Y	Y	
Improvement Option Evaluation		Conditional		Pathway B & C
Medium Term Low Carbon Plan		Conditional		Pathway B & C
Handover documents for Client	O	Y		Encouraged
Claim of Compliance PAS2030		Y		One could cover many measures
MCS Compliance Certificate		Conditional	Y	Where PAS2035 and MCS
Claim of Compliance PAS2035		Y		
Monitoring and Evaluation outcomes				Post completion as conducted
Guarantee / Insurance	Y	Y	Y	
Other commissioning certificates				
Other				With description
Contract / Invoice				
Pre-Design Building Survey				
Pre-Installation Building Inspection				
Mid-install Inspection		O		Requested where available
Commissioning Checklist	Y			Where applicable
Evidence of submission to CPS	O			Where applicable
Other Data				
Property details	Y	Y	Y	
Property owner contact	Y	Y	Y	
Work details	Y	Y	Y	
MCS Certificate Number		Where MCS	Y	
Gas Safe / CPS Registration Number	Y			

Key	
Y	Mandatory
O	Optional, but encouraged
Conditional	See notes

- 6.2.2 Where lodgements are made directly into the Data Warehouse rather than via an API, a Scheme Provider must make provision for monitoring their Registered Businesses and the amount of relevant WHD measures being lodged by them.
- 6.2.3 Where the installation requires notification of Building Regulations, a self-declaration statement will be required before submitting a lodgement.

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Audit & Compliance

7.1 Audit & Compliance:

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- 7.1.1 TrustMark will perform a risk-based quality assurance audit / redress process on boiler and central heating system installations and repairs that have been completed under the WHD and lodged into the Data Warehouse.
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- 7.1.2 TrustMark may make Scheme Providers (and other relevant bodies) aware of quality assurance non-conformity identified under the quality assurance function for follow up and resolution as appropriate. Scheme Providers are required to manage Registered Businesses performance in relation to remediation of non-compliant work.
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- 7.1.3 Where non-conformity is identified that may have an impact on compliance with the BEIS/Ofgem scheme requirements, TrustMark may notify the relevant party(ies) accordingly.
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- 7.1.4 Where identified non-compliance is not remediated within required timescales TrustMark may void the certificate of lodgement but only after remediation protocols have been exhausted, and TrustMark then deem it appropriate.
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Glossary

Boiler	Includes gas boilers supplied by mains gas and liquified petroleum gas (LPG), oil boilers, electric boilers and biomass boilers
Central Heating System	Is a system which provides heat for the purposes of space heating through a boiler or other heat source connected to one or more separate heat emitters and where the heat source and heat emitters are all situated in the same domestic premises or building
High Rise (Building)	Has the same meaning as in PAS 2035:2019
Higher Technical Risk Properties	Means park homes, high rise buildings and buildings that are both of traditional construction and protected
Park Home	Has the same meaning as “mobile home” in section 5 of the Mobile Homes Act 1983
PAS	Means PAS 2030:2019 and/or PAS 2035:2019
Protected (Building)	Has the same meaning as in PAS 2035:2019
Traditional (Construction)	Has the same meaning as in PAS 2035:2019