ecmk Accreditation Scheme Onboarding Support Guide

- Domestic Energy Assessor (DEA)
- Non-Domestic Energy Assessor (Levels 3&4) (NDEA)
- Retrofit Assessor (RFA)
- Retrofit Coordinator (RFC)
- Section 63 Assessor (Scotland)
- Display Energy Certificates Assessor (DEC)
- Legionella Risk Assessor (LRA)

Welcome

Thank you for choosing ecmk Accreditation Scheme.

To help get you onboarded we have prepared this guide which aims to answer some of your questions and provide you with useful information.

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Useful contacts

ecmk Accreditation:

support@ecmk.co.uk | 0333 123 1418 opt 1

Software Support:

supportuk@Cotality.com | 0333 123 1418 opt 3

ecmk Accounts Team:

accountspayableuk@Cotality.com | 0333 123 1416

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Retrofit Coordinators

salesuk@cotality.com | 0333 123 1415

ecmk.co.uk

Setup process

Step one

- **Complete an Application form**
- Receive Assessor Hub log in details
- Log into your pending ecmk Account on our Assessor Hub portal and upload your Supporting documents (see page 6-7)
- Once your documents have been checked and verified, we will send a payment link (if required (Retrofit))

There is no annual fee to join us as DEA/NDEA/DEC/LRA

Step two

- Check your emails for our **Welcome email** which will include lots of useful information and your Software log in details
- You will receive your ecmk ID badge within 5-7 days
- If you have been set up on a pre-payment basis, please upload credit to your Account

Step three

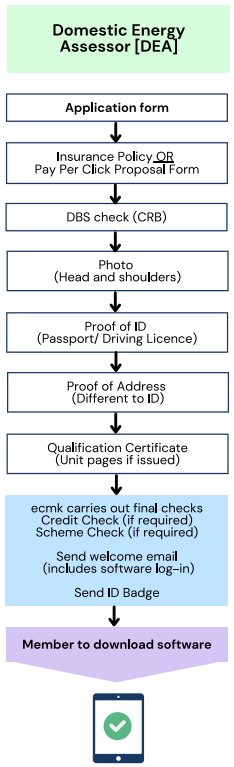
- Download software
- You can start to use the software straight away
- Retrofit Coordinators – *Please contact Cotality to set up your PAS Hub Account*

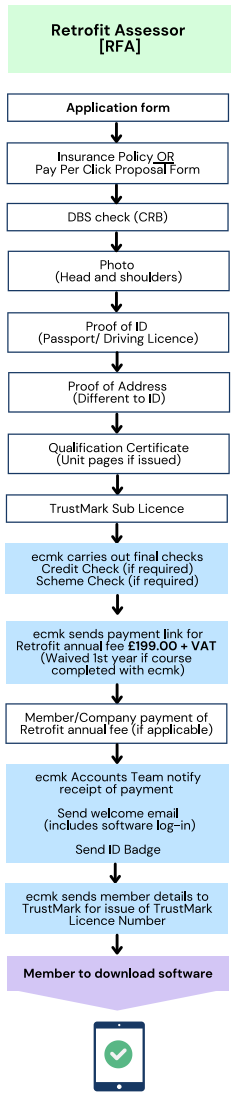
IMPORTANT:

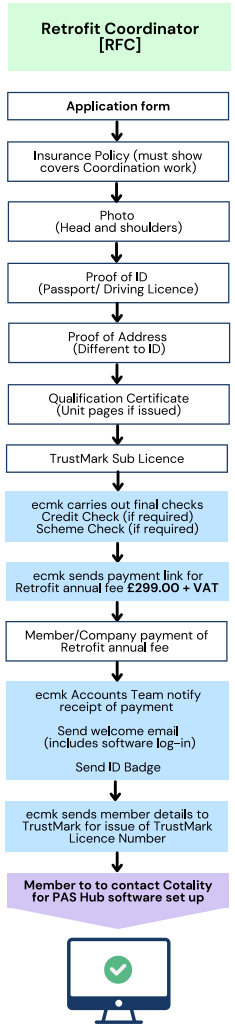
Please do not forward supporting documents to us via email or post, due to the GDPR regulations and the scheme's ISO 270001 security policy.

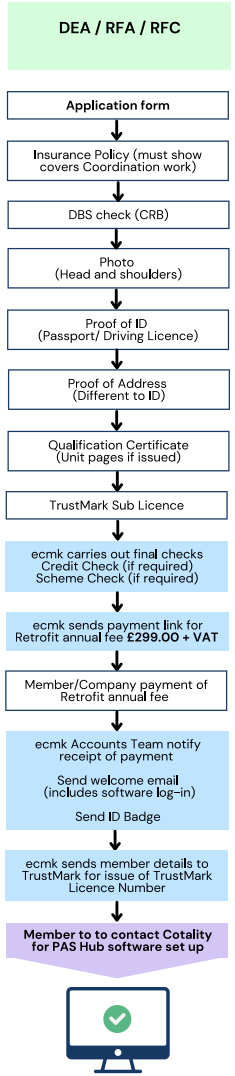
Please be informed pending ecmk Accounts are valid for 3 months before they are automatically removed, deleting all documents attached due to GDPR regulations.

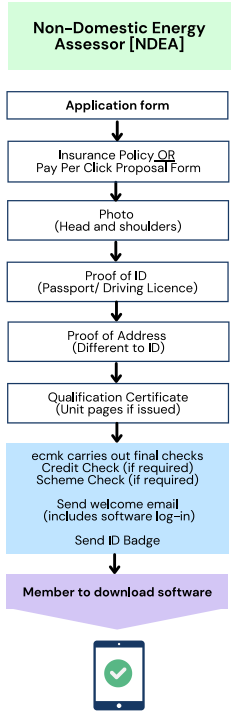
Joining and onboarding overview

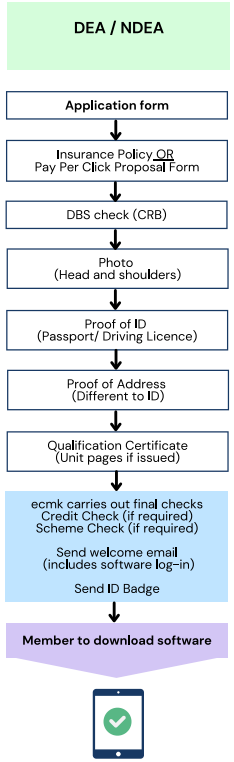












NOTE: As of 01/01/2026 Retrofit Coordinators require a government issued basic DBS Check

Application support (supporting documents)

Uploading your Supporting Documents [https://assessorhub.net/]

Username: (Your email address)
Password: **Password123@**
Member Management > Attachments > Mandatory Attachments

Assessor Hub

Application form

You will find the link on your joining information email or on our website. Please remember to tick all the Qualification strands you are applying i.e., Existing Dwellings (DEA) and Retrofit Assessor. If you are applying for a personal account, you can leave section 2 blank. Once you have completed and electronically signed the form you can either download it as PDF or save the PDF sent to you from Adobe and then upload it to Attachments on Assessor Hub.

DEA Qualification

If you're a DEA who qualified before 2012, you must provide proof of a DEA Upskill course certificate. If you do not have this or you're unsure whether you have completed this, please let us know so the Scheme Manager can review your Application.

CRB

We no longer require a DBS (CRB) or Disclosure (Scotland) to be countersigned, however, we require a clear scan/screenshot/photograph which shows the whole document, if this is more than one page, we require all pages (one page per photo or scan). If you have an online DBS check, please provide us with the certificate number and one time sharing code so we can verify the document. We do not accept background checks. A DBS must be provided by the Disclosure and barring service. DBS checks are valid for 3 years. *If you have any unspent convictions and wish to speak to us about these, please contact us.*

Credit Check (ecmk only)

No action required, if the Company or Persons you put into the Account holder box on the Direct Debit Mandate is not already on our systems/set up for billing we will run a credit check. This will confirm if your Account will be set up as monthly billing or on a pre-pay basis.

Insurance check

Please either complete our insurance pay per click insurance proposal form (not for Retrofit Coordinators), OR if you have Public Liability and Professional Indemnity insurance policies, please also provide us with a copy.

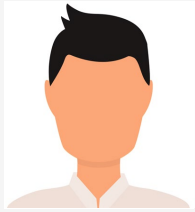
Application support (supporting documents) continued…

Membership fees paid
(if applicable ECMK only)

No action required, this is for Retrofit - if you are due to pay a Retrofit annual fee, we will send you a payment link once all your supporting documents have been verified. Your ecmk Account will be activated upon receipt of payment and we will send your welcome email containing log in details for any software required (Smart Survey (DEA) and PAS App (Retrofit Assessments)). Retrofit Coordinators, please contact Cotality for PAS Hub set up and log in details.

Photo

This is a head and shoulders photograph and can be taken with a camera/phone; this is for your ecmk ID badge.



Note: We cannot accept any photos that have been edited with filters or effects.

Proof of ID

A clear scan/screenshot/photograph of your document will be accepted. This can be a driving licence or passport and must be different to the document provided for your proof of address. If you do not hold either of these documents, please get in touch with us.

Proof of Address

A clear scan or photograph of your document is suitable, any official letter, i.e. Utilities provider, Council, Bank will be accepted. Document must be dated within 6 months and different to your proof of ID.

Qualification

We require the certificates for whichever strand you are applying for, for example DEA, Non-Domestic Assessor, Retrofit Assessor. We will require all pages that were awarded (including modules/unit pages). Please note, if you completed a course with ecmk, we will have uploaded your certificate to your pending ecmk Account.

Scheme Check (ecmk only)

No action required, if you are with or have previously been with an Accreditation Scheme, we will contact them for a basic reference. If you are currently suspended with another scheme, you will need to resolve this before we can make your ecmk Account active (depending on the reason, please contact us if you wish to discuss).

TrustMark Sub Licence

a requirement from TrustMark, please complete and sign if you are applying for Retrofit.

Other useful information:

Mandatory attachments, if you have already used the heading, and need to upload further documents, i.e. qualifications, you can click add document rather than mandatory document.

If your **Assessor Hub link does not work** from your joining email, please clear your internet browsing history, if this does not resolve the issue, try using a different search engine, we recommend Chrome. If you still have issues, please contact us.

Retrofit Coordination Insurance – Pay per click insurance cannot be used. Public Liability and Professional Indemnity is required, and must include and show it covers Retrofit Coordinator work (a side letter or email from the insurance Company can be accepted). Further details of what is required for Insurance policies can be found on our Application Form.

If you are **unsure how much CPD is required**, please refer to the details on page 9 or contact ecmk's Accreditation Team.

Administration fees are currently being waived (£99 + VAT)

There is no annual fee to join us as DEA/NDEA/DEC/LRA, you will only pay for services used.

If you completed the RFA course with ecmk or Energy Trust the first years fee will be waived

Pay Per click Insurance form, when signed you will receive a PDF copy sent to your email, please upload this to attachments on Assessor Hub (this cannot be for Retrofit Coordination)

If you have more than one Assessor linked to your Company you will be required to sign an Accreditation and Certification Services Agreement

Membership fees can be found within this document on our application form and also our website > Accreditation > Domestic Energy Assessor Energy > Fee Sheet

Continue Professional Development (CPD)

All Energy Assessors must complete a minimum of 10 hours Continuous Professional Development (CPD) every year which coincides with the start and end date of the individual assessor certification/Accreditation.

It is a mandatory requirement of Energy Assessor Accreditation to complete annual CPD. It demonstrates your competency in keeping on top of new standards and legislation, while expanding your industry knowledge.

If you are applying for other strands such as Non-Domestic Energy Assessor or Retrofit Assessor, you are also required to complete additional CPD hours on top of the 10 hours for a Domestic Energy Assessor. **Some examples below of multiple qualifications:**

A DEA who is also a Retrofit Assessor

10 Hours for DEA
10 Hours for Retrofit Assessor

A DEA who is also a Retrofit Coordinator and a Retrofit Assessor

10 Hours DEA
25 Hours Retrofit Coordinator
0 Hours Retrofit Assessor

A DEA Who is also a DECEA and a Retrofit Coordinator

10 Hours DEA
5 Hours additional for DECEA
25 Hours for Retrofit Coordinator

A Non-Domestic DEA who is also a Retrofit Assessor and a Retrofit Coordinator

10 Hours for Non-Domestic DEA
25 Hours for Retrofit Coordinator
0 Hours for Retrofit Assessor *(because of the Coordinator qualification and CPD hours)*

CPD evidence

If you attend an online CPD course with ecmk we will upload this to your Account. If you carry out with another Accreditation Scheme or training provider, you will need to upload your completion certificate as evidence, if this is not provided, we will need a payment receipt or proof of booking along with some notes of learning outcomes.

CPD evidence for 'reading'

Please provide the title of the reading along with learning outcomes. This could be handwritten notes photographed or typed and uploaded. Once you are Accredited with ecmk you will have access to Scheme Documents, this includes our technical bulletins which can be read and submitted as CPD (ECMK Bulletins - dated within 12 months).

Fees

Lodgement Type:	Fees	Pay per click insurance
EPC - Existing Dwelling (RdSAP)	**£3.23**	**£0.32**
EPC - New Dwelling	**£11.75**	**£1.13**
ERP – Energy Performance Report	**£1**	**N/A**
DEC – Display Energy Certificate	**£6.75**	**£1.13**
Legionella Risk Assessment	**£3.75**	**£0.45**
Section 63	**£11.75**	**£1.13**
Retrofit Assessments	**£5**	**£0.48**
Retrofit Coordinator	**£5**	**N/A**

Membership:	Fees
Retrofit Assessor	**£199.00 per year**
Retrofit Coordinator	**£299.00 per year**
PAS Document Download	**£10 per job**

- All fees given are exclusive of VAT, which will be charged at the prevailing rate.
- All fees are excluding the Central Register Fee that may be subject the change.
- VAT is not applied to the Central Register Fee.
- There are no joining or subsequent yearly membership fees to the EPBD schemes.
- **Cancellation:** If a certificate needs to be replaced or cancelled by an assessor or the scheme – the above fees are applicable.

EPC software

SMART EPC App

Capture RdSAP data onsite

ecmk's SMART EPC App enables qualified DEAs to generate Energy Performance Certificates (EPCs) with associated evidence and site notes integrated in one place. The software incorporates on-device PCDB search and RdSAP calculations and enables lodgement of EPCs direct to central EPC Registers.

ecmk members can download the SMART EPC App via the Apple App Store.

More info >

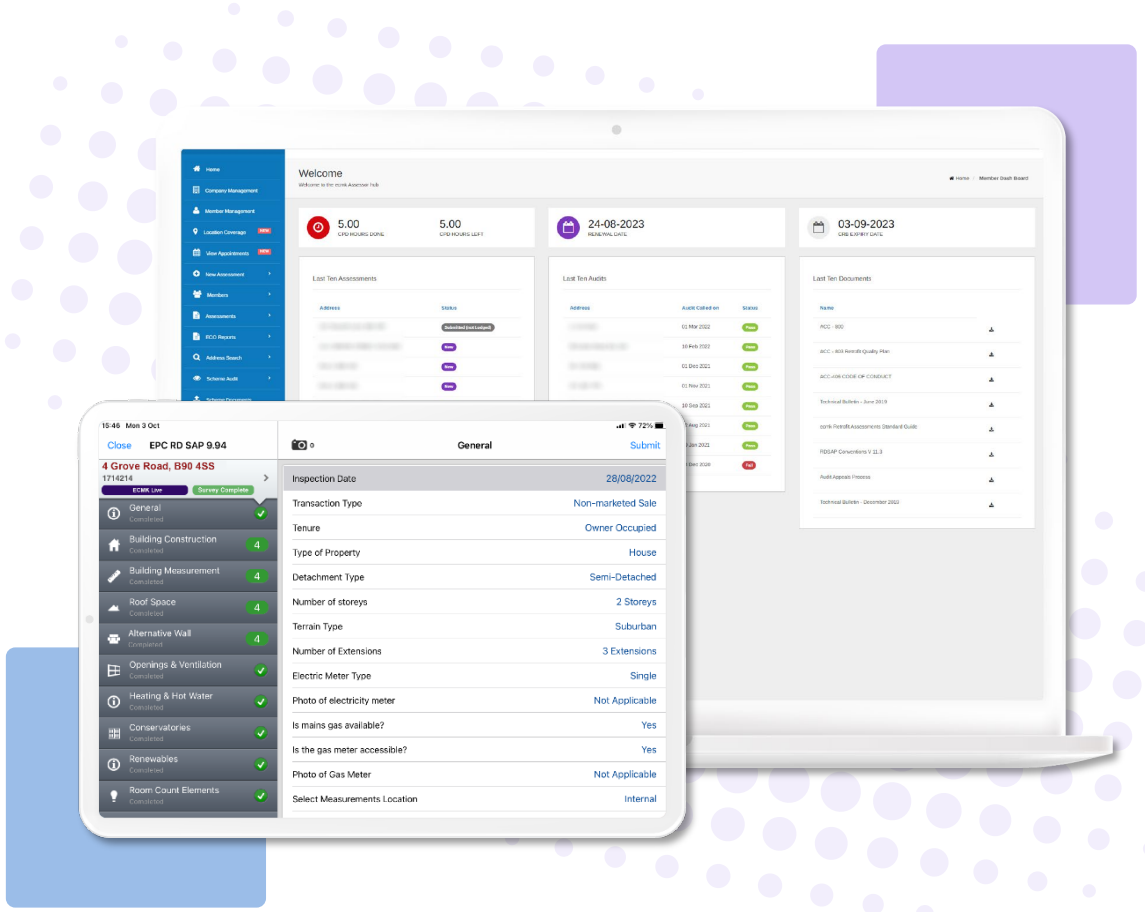
Assessor Hub

Manage surveys and EPC reports

Assessor Hub is ecmk's online portal that provides ecmk Assessors with an accreditation account where they can manage their personal details. It is also an EPC management platform that controls lodgements to the central registers, enabling the review of current and archived certificates.

The software integrates seamlessly with ecmk mobile surveying Apps such as SMART EPC App and provides rapid entry and review of RdSAP data.

More info >



Retrofit software

PAS 2035 Retrofit App

Cotality's PAS 2035 Retrofit App mobile software enables ecmk Accredited Retrofit Assessors to capture all necessary PAS, ECO, technical information and floor plans on-site in one single visit, with built in validation checks.

More info >

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PAS Hub

Cotality's web-based workflow management system enables the delivery of PAS 2035 and ECO compliant measures. Manage projects, including, transfer of work between companies, project sign-off and lodgement onto the TrustMark data warehouse.

More info >

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ecmk accredited Retrofit Assessors get free access to Cotality's market leading PAS 2035 Retrofit Software. The software is designed to facilitate the assessment, along with the installation and reporting of Retrofit projects in accordance with PAS 2035. The software also supports Government schemes including ECO, LAD & SHDF and enables easy collaboration with Coordinators and Installers.

Once you are accredited, you can start to use the software straight away and you only pay for the lodgement fee, which includes a pay per click Professional Indemnity and Public Liability insurance. You will get access to Cotality's mobile Retrofit App, alongside the desktop PAS Hub software.

If you would like to book onto our PAS App CPD course (1.5 Hours), please contact us.

Notes for Retrofit Coordinator PAS Hub users:

- No upfront fee for using the PAS Hub as an ecmk Retrofit Coordinator
- Required to sign a Cotality PAS Hub Software Licence and DD mandate to gain access
- Cotality charge £16 (ex VAT) for every Job accepted from a customer (collected by the DD and billed separately from ecmk fees)
- Cotality provide full training and ongoing Account Management support
- Cotality host a monthly Coordinator Question Time which, if attended in full, is worth 1 hours CPD

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Ongoing support

Monthly CPD courses

To view all of our CPD courses, please visit our website and click the training tab and 'browse all courses – filter CPD.

To book your 4 x 1 hour free membership courses, please choose your course and email the details to support@ecmk.co.uk

You can book additional CPD course directly on our website.

CPD courses

Quarterly Technical Bulletins

We will send you quarterly Technical Bulletins which can also be used for CPD, the Bulletin will inform how to claim the CPD. Back dated copies can be located in Scheme Documents on Assessor Hub.

Claiming CPD reading hours *- If you are using Bulletins as CPD, please remember these need to be dated within 12 months.*

Scheme Docs

Keep up to date with news

To keep up to date with the latest news, please visit our website, you can also follow us on **LinkedIn** and **X** for daily posts.

News

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Thank you

If you have questions, please don’t hesitate to contact us via the below.

We look forward to welcoming you onboard.

T: 0333 123 1418

E: support@ecmk.co.uk