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 as your accreditation scheme. To help you get onboarded, please us this guide as a reference document

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Useful contacts

ecmk Accreditation:

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

(Accreditation queries e.g. onboarding, CPD and renewals)

Software Support:

supportuk@cotality.com | 0333 123 1418 opt 3

(Software queries and technical assistance)

ecmk Accounts/Finance:

accountspayableuk@cotality.com | 0333 123 1416

(Billing and membership payment queries)

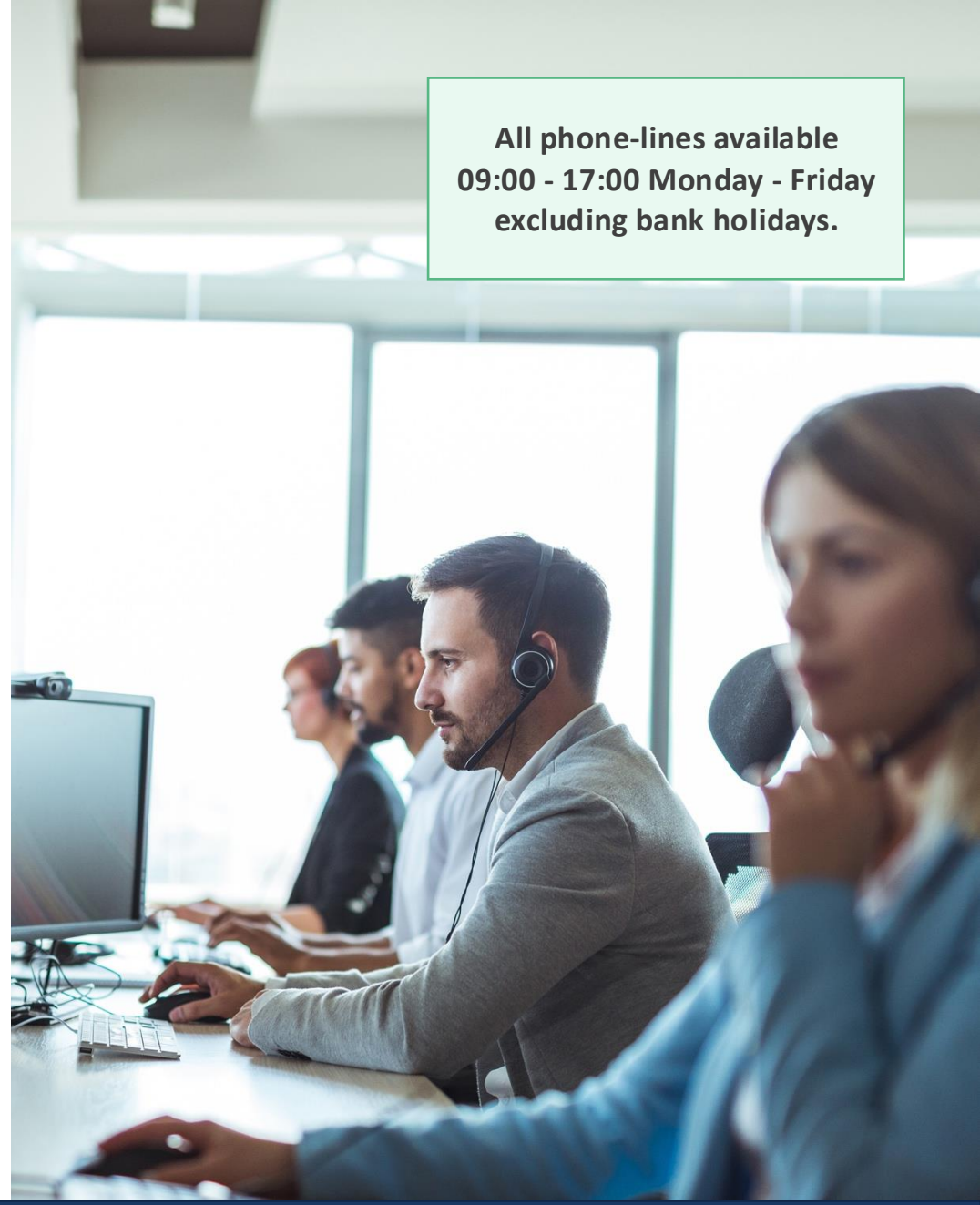
cotality™

Retrofit Coordinators

salesuk@cotality.com

ecmk.co.uk

All phone-lines available
09:00 - 17:00 Monday - Friday
excluding bank holidays.



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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). If you have not received your log in details, check your junk/spam folders and email support@ecmk.co.uk
- Once your documents have been verified, you may receive a payment link from us. This only applies to those who're becoming accredited for 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. Look out for an email from support@ecmk.co.uk
- 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 - our software is only available to IOS devices (iPad or iPhone)
- You can start to use the software straight away. Your log in details will be in your welcome email.
- Retrofit Coordinators – *Please contact Cotality to set up your PAS Hub Account*

GDPR & Security Policy (ISO 27001): Do NOT send supporting documents via email or post. All documents must be uploaded directly to Assessor Hub. Pending accounts expire after 3 months – deleting all attached documents.

Joining & onboarding — DEA

DEA STRAND

1 Complete Forms

- Complete **application form**
- **Insurance policy** - PL and PI (or Pay-Per-Click form)

2 Supporting Documents

- Basic **DBS Check (CRB)**
- **Assessor photo -** head and shoulders (Professional style)
- **Proof of ID** (Driving License or Passport)
- **Qualification certificates** – All pages

3 Checks & Payments

- ecmk **checks conducted** (if required) e.g. credit and scheme checks

4 Registration & Software

- ecmk sends **welcome email** and assessor **ID Badge** is dispatched
- Member downloads software: Assess+ mobile App

GDPR & Security Policy (ISO 27001): Do NOT send supporting documents via email or post. All documents must be uploaded directly to Assessor Hub.
Pending accounts expire after 3 months – deleting all attached documents.

Joining & onboarding — DEA/Retrofit Assessor

DEA/RA STRAND

1 Complete Forms

- Complete **application form**
- **Insurance policy** - PL and PI (or Pay-Per-Click form)
- Sign **TrustMark sub-licence** form

2 Supporting Documents

- Basic **DBS Check (CRB)**
- **Assessor photo -** head and shoulders (Professional style)
- **Proof of ID** (Driving License or Passport)
- **Qualification certificates** – All pages

3 Checks & Payments

- ecmk **checks conducted** (if required) e.g. credit and scheme checks
- ecmk sends **payment link** For **£199 + VAT** (if applicable)
- Member/company makes **payment**
- ecmk finance team issues **confirmation of payment**

4 Registration & Software

- ecmk sends **welcome email** and RA **ID Badge** is dispatched
- ecmk creates **TrustMark registration** - TrustMark contacts RA to activate
- Member contacts Cotality for access and set up of PAS Hub software.
- Member downloads software: Assess+ mobile app

GDPR & Security Policy (ISO 27001): Do NOT send supporting documents via email or post. All documents must be uploaded directly to Assessor Hub.
Pending accounts expire after 3 months – deleting all attached documents.

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Joining & onboarding — Retrofit Coordinator

RC STRAND

1 Complete Forms

- Complete **application form**
- **Insurance policy** - PL and PI
  Specific cover for **'Retrofit Coordinator'**
- Sign **TrustMark sub-licence** form

2 Supporting Documents

- Basic **DBS Check (CRB)**
- **Assessor photo -** head and shoulders
  (Professional style)
- **Proof of ID**
  (Driving License or Passport)
- **Qualification certificates** – All pages

3 Checks & Payments

- ecmk **checks conducted** (if required)
  e.g. credit and scheme checks
- ecmk sends **payment link**
  For **£299 + VAT**
- Member/company makes **payment**
- ecmk finance team issues
  confirmation of payment

4 Registration & Software

- ecmk sends **welcome email** and
  RC **ID Badge** is dispatched
- ecmk creates **TrustMark registration** -
  TrustMark contacts RC to activate
- Member contacts Cotality for access and
  set up of PAS Hub software.
- Member downloads software:
  Assess+ mobile app

GDPR & Security Policy (ISO 27001): Do NOT send supporting documents via email or post. All documents must be uploaded directly to Assessor Hub.
Pending accounts expire after 3 months – deleting all attached documents.

Joining & onboarding — DEA/Retrofit Assessor/ Retrofit Coordinator

DEA/RA/RC STRAND

1 Complete Forms

- Complete **application form**
- **Insurance policy** - PL and PI
  Specific cover for **'Retrofit Coordinator'**
- Sign **TrustMark sub-licence** form

2 Supporting Documents

- Basic **DBS Check (CRB)**
- **Assessor photo -** head and shoulders (Professional style)
- **Proof of ID**
  (Driving License or Passport)
- **Qualification certificates** – All pages

3 Checks & Payments

- ecmk **checks conducted** (if required)
  e.g. credit and scheme checks
- ecmk sends **payment link**
  For **£299 + VAT**
- Member/company makes **payment**
- ecmk finance team issues **confirmation of payment**

4 Registration & Software

- ecmk sends **welcome email** and RC **ID Badge** is dispatched
- ecmk creates **TrustMark registration** - TrustMark contacts RC to activate
- Member contacts Cotality for access and set up of PAS Hub software.
- Member downloads software: Assess+ mobile app

GDPR & Security Policy (ISO 27001): Do NOT send supporting documents via email or post. All documents must be uploaded directly to Assessor Hub.
Pending accounts expire after 3 months – deleting all attached documents.

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Joining & onboarding — NDEA

NDEA STRAND

1 Complete Forms

- Complete **application form**
- **Insurance policy** - PL and PI (or Pay-Per-Click form)

2 Supporting Documents

- **Assessor photo -** head and shoulders (Professional style)
- **Proof of ID** (Driving License or Passport)
- **Qualification certificates** – All pages

3 Checks & Payments

- ecmk **checks conducted** (if required) e.g. credit and scheme checks

4 Registration & Software

- ecmk sends **welcome email** and assessor **ID Badge** is dispatched

GDPR & Security Policy (ISO 27001): Do NOT send supporting documents via email or post. All documents must be uploaded directly to Assessor Hub.
Pending accounts expire after 3 months – deleting all attached documents.

Joining & onboarding — DEA/NDEA

DEA/ NDEA STRAND

1 Complete Forms

- Complete **application form**
- **Insurance policy** - PL and PI (or Pay-Per-Click form)

2 Supporting Documents

- Basic **DBS Check (CRB)**
- **Assessor photo -** head and shoulders (Professional style)
- **Proof of ID** (Driving License or Passport)
- **Qualification certificates** – All pages

3 Checks & Payments

- ecmk **checks conducted** (if required) e.g. credit and scheme checks

4 Registration & Software

- ecmk sends **welcome email** and assessor **ID Badge** is dispatched
- Member downloads software: Assess+ mobile App

GDPR & Security Policy (ISO 27001): Do NOT send supporting documents via email or post. All documents must be uploaded directly to Assessor Hub.
Pending accounts expire after 3 months – deleting all attached documents.

Application support (supporting documents guide)

Assessor Hub – https://assessorhub.net **Username:** Registered email **Password:** (This will be sent to you)

All supporting documents must be uploaded directly to your pending account. ***Member Management > Attachments > Mandatory Attachments***

Application Form

You'll find the application form on our website 'Join Now'. Complete and sign electronically. Ensure all qualification strands you are applying for (e.g. DEA, Retrofit Assessor etc) are checked. 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.

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.

Photograph

Formal head and shoulders photograph for your ecmk ID badge. This can be taken with a camera/phone. **Strictly no filters/effects.**

CRB

Upload a clear scan, screenshot or photo of **all** pages of your official DBS certificate (valid for 3 years). NOTE: background checks and countersignatures not required.

For online DBS checks, provide us with the sharing link and code.

Please contact us if you wish to discuss any unspent convictions.

For Disclosure Scotland – paper certificates are no longer issued. Your results must be shared online within 10 days of issue.

Insurance checks

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. If you'd like to use our pay-per-click insurance, we will send you a link to this.

TrustMark sub-licence

This is a mandatory signed form for Retrofit applicants only.

DEA Qualification

If you're a DEA who qualified before 2012, you must provide proof of completion of RdSAP 10 CPD. If you do not have this, please let us know so the Scheme Manager can review your application.

Qualifications

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).

NOTE: if you completed a course with ecmk, we will have uploaded your certificate to your pending ecmk Account.

Credit checks

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.

Payment methods

All payment methods are determined by a credit check. This will either be carried out against an individual or a company

Direct Debit

For direct debit payments, you will receive an invoice at the end of each month for lodgement your fees. The direct debit will be taken the following month.

For individuals, we will request you complete a direct debit form.

For companies, we will send a request to a director (listed on Companies House) to complete a company contract. This will contain a direct debit form.

Pre-Payment

A pre-payment arrangement requires members/companies to top up their account with credit. Their lodgement fees will then be taken from this credit.

We will send the top up details with the welcome email and upon request.

For companies, we will send a request to a director (listed on Companies House) to complete a company contract. This **will not** contain a direct debit form.

FAQs

Q. Do I need to pay a membership fee?

A. 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 year's annual membership fee will be waived. We will only require a membership fee if you're a Retrofit Coordinator or if you're a Retrofit Assessor who has not trained with ecmk or Energy Trust. Membership fees can be found within this document on our application form and also, our website > Accreditation > Domestic Energy Assessor Energy > Fee Sheet

Q. Why does the link for Assessor Hub not work?

A. 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. The link for Assessor Hub is assessorhub.net. If you experience further issues, please contact us.

Q. Can you tell me more about insurance?

A. 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 are not/cannot utilise our Pay Per Click insurance, Public Liability and Professional Indemnity is required. Further details of what is required for Insurance policies can be found on our Application Form. If you're onboarding as a Retrofit Coordinator, your insurance document must specify Retrofit Coordination/ Project Management under the business description or business activities section.

Q. Can I send my required documents by email?

A. For security, we ask that all documents are uploaded via our portal, Assessor Hub.



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.

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 an NDEA and a Retrofit Coordinator
10 Hours DEA
5 Hours additional for NDEA
25 Hours for Retrofit Coordinator

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

10 Hours DEA
25 Hours Retrofit

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

10 Hours for Non-Domestic DEA
25 Hours for Retrofit

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/self study

Please provide the title of the reading/self study 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	Government Register fee
EPC - Existing Dwelling (RdSAP)	**£3.23**	**£0.32**	**£1.50 – England/Wales £6 - Scotland**
EPC – Non-Domestic	**£11.75**	**£1.13**	**£1.70 – England/Wales £15.50 - Scotland**
ERP – Energy Performance Report	**£1**	**N/A**	**N/A**
DEC – Display Energy Certificate	**£6.75**	**£1.13**	**£1.70 – England/Wales £15.50 - Scotland**
Legionella Risk Assessment	**£3.75**	**£0.45**	**N/A**
Section 63	**£11.75**	**£1.13**	**N/A**
Retrofit Assessments	**£5**	**£0.48**	**N/A**
Retrofit Coordinator	**£5**	**N/A**	**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.
- We are currently waiving all administration fees for onboarding (£99 + VAT)

EPC software

Assess+ App

Capture RdSAP data onsite

ecmk's Assess+ 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.

We run a CPD session on Assess+. You can see available sessions here

ecmk members can download the Assess+ App via the Apple App Store.

More info >

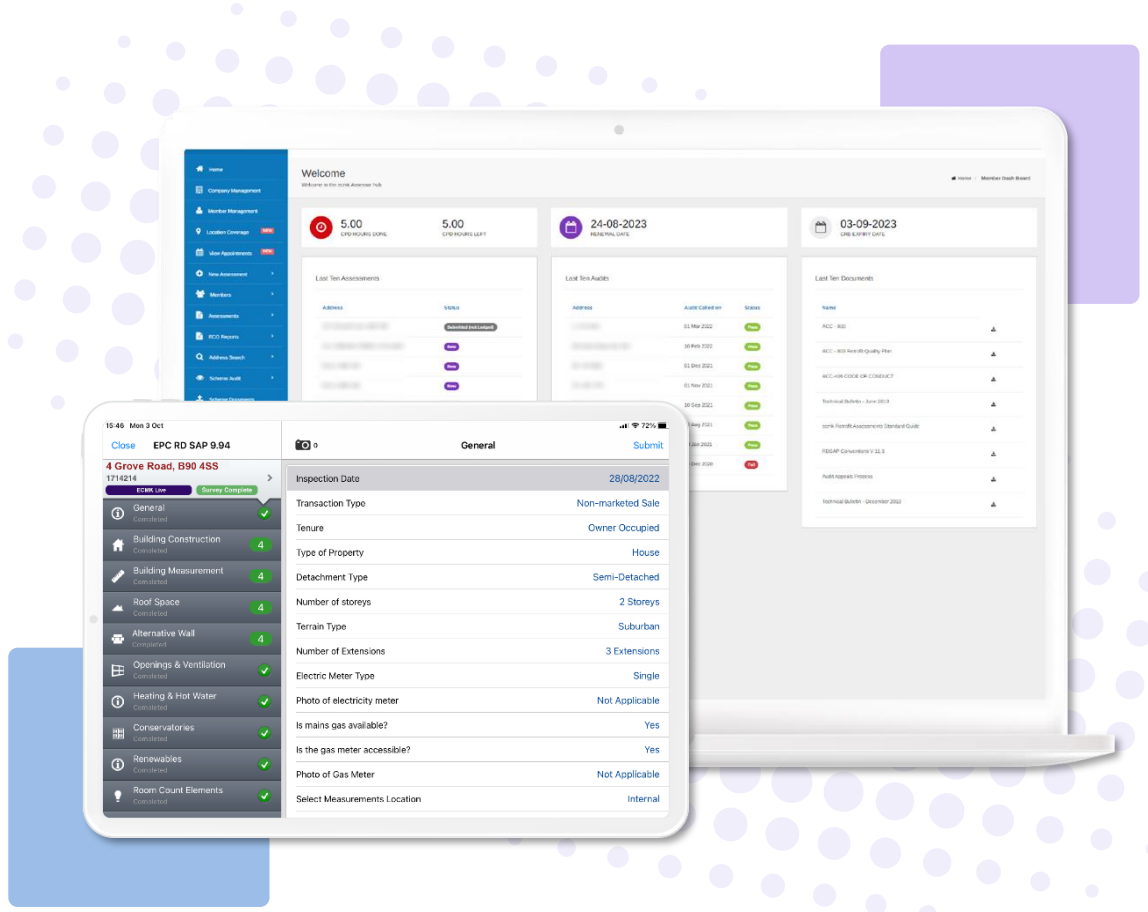
Assessor Hub

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

Assess+ App

The Assess+ 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 >

cotality™

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



ecmk Bulletins

We will send you ecmk Bulletins and technical updates throughout the year, which can also be used for CPD, the Bulletin will inform how to claim the CPD. Back dated copies can be found in the Scheme Documents tab 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** 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

