

PAS 2035

TrustMark lodgement

Supply chain advice pack

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Funded by:



Department for
Energy Security
& Net Zero

Overview

TrustMark lodgement is the process that ensures retrofit work is compliant with government standards and is properly recorded in the TrustMark Data Warehouse.

Compliant lodgement of the key project documentation is necessary before funding will be released in WH: Social Housing Fund Wave 3 and WH: Local Grant schemes.

Please refer to Trustmark for the latest guidance.

Requirements

For a PAS 2035 TrustMark lodgement, the following documents are typically required to ensure compliance and successful registration in the TrustMark Data Warehouse, which is the official repository for such projects. These documents vary slightly depending on whether the project is following PAS 2035:2019 or the updated PAS 2035:2023 standard, but the core documentation remains consistent.

The Retrofit Coordinator is responsible for making sure that the correct documents for project lodgement are uploaded.

Required Documents for TrustMark Lodgement

The Retrofit Assessment Report, which includes:

- Occupancy assessment
- Condition survey
- Ventilation assessment
- Energy report (e.g. RdSAP, SAP or PHPP)
- Medium-Term Improvement Plan (MTIP)
 - A 20–30 year plan outlining staged energy efficiency improvements. This is mandatory under PAS 2035:2023.

Retrofit design documentation:

- Property-specific design for each energy efficiency measure (EEM). This includes:
 - U-values and thermal bridging calculations
 - Ventilation strategy
 - Risk assessment and mitigation strategy
 - Design drawings and specifications

Installation evidence:

- Photos before, during, and after installation
- Installer certification (PAS 2030:2019 or PAS 2030:2023)
- Product datasheets and warranties

Retrofit Coordinator's project plan:

- Oversees the whole process. This includes:
- Risk pathway classification
- Project timeline
- Stakeholder responsibilities

Post-Installation report:

- Verifies that all measures were installed correctly.
- May include air tightness test results, ventilation commissioning, etc.

Declaration of conformity:

- Signed by the Retrofit Coordinator confirming compliance with PAS 2035 and TrustMark requirements.

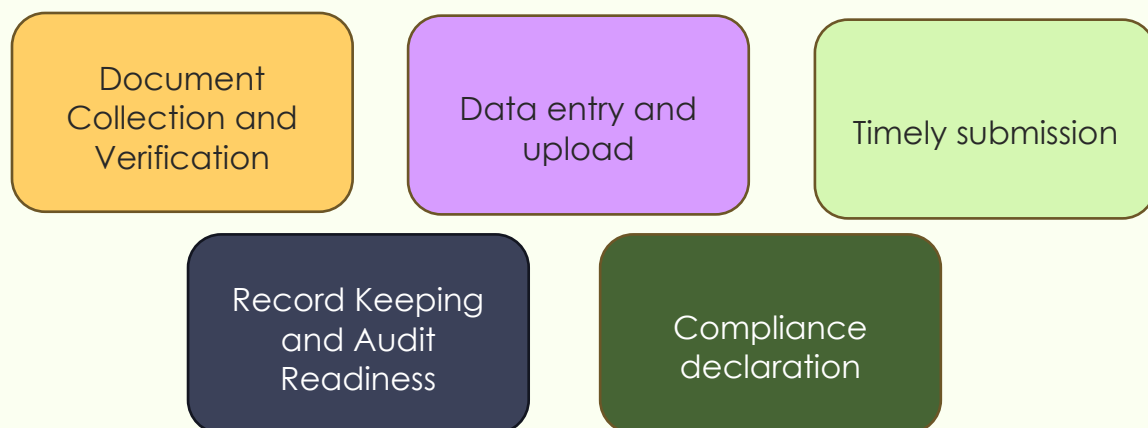
Lodgement metadata:

- Project reference number
- Address and EPC data
- Scheme (e.g. ECO4, SHDF, GBIS)

These documents must be uploaded to the TrustMark Data Warehouse within 20 working days of project completion.

What is the role of the Retrofit Coordinator when lodging documents on the TrustMark data warehouse?

Below are the key duties for the Retrofit Coordinator regarding TrustMark Data Warehouse lodgement:



Document collection and verification

- Gather all required documentation from the project team:
 - Retrofit Assessment Report
 - Medium-Term Improvement Plan (MTIP)
 - Retrofit Design documents
 - Installation evidence (photos, certificates, warranties)
 - Post-installation verification reports
- Review each document for completeness, accuracy, and compliance with PAS 2035.

Data entry and upload

- Log into the TrustMark Data Warehouse portal
- Input project metadata:
 - Property address
 - Retrofit pathway
 - Measures installed
 - Installer and assessor details
- Upload all supporting documents in the correct format.

Compliance declaration

- Complete and sign a Declaration of Conformity, confirming that:
 - The project complies with PAS 2035.
 - All work was carried out by certified professionals.
 - All documentation is accurate and complete.

Timely submission

- Ensure the lodgement is completed within 20 working days of project completion.
- Tracks submission deadlines and follows up on any missing data.

Record keeping and audit readiness

- Maintain a copy of all lodged documents.
- Prepare for potential audits or quality assurance checks by TrustMark or scheme providers.

Resources

- Who is TrustMark? – [available here.](#)
- TrustMark Data Warehouse – [available here.](#)
- TrustMark Video Lodgement Guides – [available here.](#)
- PAS 2035:2023 Design Guidance – [available here.](#)



Advice Pack: “The role of the Retrofit Coordinator in Pre and Post Delivery” available [here.](#)

Advice Pack: “The role of the retrofit coordinator in post retrofit completion” available [here.](#)



Podcast: “TrustMark and the Data Warehouse” available [here.](#)

Masterclasses: “Role of a Retrofit Coordinator” [here.](#)

