

A guide to the PAS 2030 Installer Assessment Process - Office

(Cross reference - Guidance No 66 - A guide to the PAS 2030 Installer Assessment Process - Site)

PAS 2030 is the document that defines the requirement for installers under ECO and is available from the BSI website. In addition, you will need to refer to the BBA Scheme Document(s) relating to the measure(s) you are applying for. These are downloadable from the BBA website and are the two documents that the BBA will be assessing you against and we would advise you to obtain copies before we carry out the office assessment.



PAS 2030 contains a series of core elements relating to all measures and a number of annexes giving the technical requirements for each product or system that is covered by ECO.

The office assessment will normally be completed within a day and will focus on the core criteria of PAS 2030 and the measure specific annexes that relate to the scope of your application.

The BBA assessor will guide you through the assessment in a constructive way. To pass the assessment you will need to demonstrate that your company has a management process in place that meets the core criteria of PAS 2030 and the requirements of the relevant Scheme Document(s). Please do not be surprised if you receive non compliances against you, these will be carefully explained and you will be given time to respond with corrective actions.

In this guide we have illustrated what we would expect to see during the visit. In smaller companies many functions may be performed by just a few people, maybe even one person. Do not be put off by this, the ECO scheme assessment is just as appropriate for you as larger companies and we will take your particular circumstances into account during the audit.

Set out below are the key points on which we will need to be satisfied. This is a guide, PAS 2030 and the Scheme Documents contain more detail and it is recommended that you spend some time familiarising yourself with these before the visit.

Installation process

PAS 2030 requires that you define and record the installation process in a method statement for each energy efficient measure you install. This includes the following elements listed in Section 4 of PAS 2030:

- The product or system specified (including the requirements of the measure specific annex).
- Location of the installation and specific customer requirements.
- Tools and equipment needed calibration records.
- Handling and storage of materials.
- Installation instructions.
- Training required for the technicians, carding, and competence.

- Sequence of related tasks, including engaging and approving sub-contractors.
- Details of commissioning.
- Handover to the customer.
- Reference to any other measures already installed in the property and how they will interact.
- Installation control procedure and documentation.
- Maintenance of these records.

For most measures the system supplier will have agreed an installation method statement for that system.

Installation process management

You will need to have in place and operate a procedure that ensures the installation is undertaken to meet the design specification, to the satisfaction of the customer and PAS 2030 Section 5, including:

- How you ensure the installation process satisfies the design specification.
- Records of pre-installation surveys.
- Records of feedback from technicians.
- A process continuity plan which ensures that should you be unable to complete an installation because of unforeseen circumstances, the process you have in place will ensure another installer can.
- An internal auditing process.
- Documented process changes.
- Installation process records, kept for at least 6 years.
- Business and financial probity, including insurance.

Service provision

You will need to have in place:

- A documented complaints procedure capable of receiving, recording and resolving complaints.
- A documented process of how staff should interact with customers.

Claims of conformity

Any claims for conformity with ECO requirements must include the following information:

- Number and date of PAS 2030.
- The measure installed and the related Annex.
- Address of the building into which it was installed.
- Date of handover and name of installer.
- Declaration of conformity to PAS 2030.

This may all seem complex and indeed the requirements of PAS 2030 and the Scheme Documents are stringent and may include additional records to be kept over and above those currently retained, particular for smaller companies. However the BBA will work with you to achieve the necessary compliance and in maintaining your approval after the initial Certification process.

Should you have any queries, please contact the BBA on 01923 665300 or construction@bba.star.co.uk