



**TRUSTMARK**  
Government Endorsed Quality

# Data Warehouse - Lodgement Amendments

V1.0 23 February 2022

#TRUSTMARKUK



## Introduction

To assist with the amendment of lodgements where the installation data entered in the Data Warehouse by Registered Businesses does not ‘match’ what has been reported to BEIS, Ofgem or Local Authorities a new function has been released.

All intended actions and subsequent amendments must satisfy the Data Policy and failure to do so would result in a potential breach or non-compliance of TrustMark Scheme rules or other obligations relating to Government funded schemes. It may also result in an inability to access or amend data within the Data Warehouse.

This new function will allow the following to be amended by individual measures:

- TMLN where the incorrect TMLN has been entered, or completely missed, when using the ‘sub-contractor’ field – where it can be validated
- Variant of the same measure type
- Property Construction (which will affect all measures in the lodgement)
- Handover Date – where it can be validated that the measure was held at that time

The function will **not** allow:

- The adding of measures that have been missed from superseded lodgements
- Change of measure that is not a variant of what was previously lodged

## First Steps

To ensure that lodgements are only updated by business that are registered, or if not registered are still trading, you will need to read in conjunction with this process document the Data Policy from this link: [TrustMark - Data Warehouse & Property HUB](#)

Before amending any lodgements, you will need to download a spreadsheet from the ‘Home’ page of your Data Warehouse account:

The screenshot shows the TrustMark Data Warehouse interface. At the top, there is a navigation bar with the TrustMark logo, 'Government Endorsed Quality', and links for 'My Account' and 'Logout'. Below this is a breadcrumb trail: 'Home > New Lodgement > PAS 2035'. The main content area displays a table of lodgements with columns for status, TMLN, and date. Each row has 'Edit' and 'View' buttons. At the bottom of the table, there is a 'Download' button (highlighted with a red box), a 'Next' button, and a 'New Lodgement' button.

Status	TMLN	Date	Actions
Not submitted		02/12/2020	Edit View
Complete and Paid	5084	12/03/2021	View
Complete and Paid	5087	16/03/2021	View
Not submitted		01/12/2020	Edit View
WHD Complete and Paid	5097	18/03/2021	View
Not submitted		05/03/2021	Edit View
Complete and Paid	5071	22/01/2021	View

1. Once you have the list of lodgements that can be amended using the new function, from the 'Home' page, enter the certificate number into the 'search' box to find it and select 'View' lodgement.
2. On the viewing lodgement screen, select the 'Amend' function as shown below:

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My Account Logout

Home New Lodgement PAS 2035 Help

Back

### Viewing ECO Lodgement

Certificate #5149

Lodgement ID:  
9Fc11559-9869-499a-9dda-a89bc7a5723c [Copy](#)

Certificate: 5149 [Copy](#)

Address	Owner	Lodgement	Property
The Square Arena Business Centre TrustMark (2005) Limited Basingstoke England Hampshire RG21 4EB	<b>Tenure:</b> Owner Occupied  <b>Name:</b> Nicola Walter  <b>Contact number:</b> 0333 555 0336  <b>Email address:</b> nwaller@trustmark.org.uk	<b>Created:</b> 22/02/2022 13:53:00  <b>Status:</b> Complete  <b>Created by:</b> test@trustmark_03_lc@2409 @mailinator.com  <b>Payment amount:</b> £38.00  <b>Paid on:</b> 22/02/2022	<b>Construction:</b> Traditional, not protected - solid wall  <b>Detachment:</b> Detached  <b>Type:</b> House

### PAS 2035 Roles

THLN	Role	Business

**Property Construction**  
Traditional, not protected - solid wall

**Scheme Provider**  
Demo Scheme Old

### Work Completed

Work	Key Dates	Product	UMR
<b>Type:</b> Cavity Wall Insulation Cavity wall Insulation (0.027) <b>PAS Standard:</b> PAS 2030:2019 <b>PAS Annex:</b> 01 <b>Sub-Installer TMLN:</b> 162453 <b>Certificate Text:</b> Mismatching_Testing_22022022 <b>ECO Measure name:</b> CWI_0.027	<b>Install:</b> 22/06/2021 <b>Handover:</b> 22/06/2021	Mismatches_22022022	9Frv47e9Vbc <a href="#">Copy UMR</a>

**Guarantee Details:**  
DIGA 25 Year Guarantee

**Amend**

### Documents

#	Document Type	Filename	Comments	Size	Created	Link
1	Claim of compliance PAS2035	2035_Test_Doc_22022022.docx		15.85 KB	22/02/2022 14:06:09	<a href="#">View Document</a>
2	Risk assessment	2035_Test_Doc_22022022.docx		15.85 KB	22/02/2022 14:06:55	<a href="#">View Document</a>
3	Assessment report	2035_Test_Doc_22022022.docx		15.85 KB	22/02/2022 14:05:52	<a href="#">View Document</a>
4	Pre-installation Building Inspection	2035_Test_Doc_22022022.docx		15.85 KB	22/02/2022 14:06:32	<a href="#">View Document</a>
5	Insurance guarantee	Guarantee Document_Testing_22022022.docx		15.87 KB	22/02/2022 13:57:52	<a href="#">View Document</a>
6	Insurance guarantee	Guarantee Document_Testing_22022022.docx		15.87 KB	22/02/2022 14:04:30	<a href="#">View Document</a>
7	Intended outcomes	2035_Test_Doc_22022022.docx		15.85 KB	22/02/2022 14:06:24	<a href="#">View Document</a>
8	Handover documents for client	2035_Test_Doc_22022022.docx		15.85 KB	22/02/2022 14:06:16	<a href="#">View Document</a>
9	Retrofit design	2035_Test_Doc_22022022.docx		15.85 KB	22/02/2022 14:06:39	<a href="#">View Document</a>
10	Claim of compliance PAS2030	2035_Test_Doc_22022022.docx		15.85 KB	22/02/2022 14:05:59	<a href="#">View Document</a>

[Re-send certificate](#)

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Build: 2022.02.10.16.00

- The next screen will show details of the lodgement and the potential changes that can be made:

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My Account Logout

Home New Lodgements PAS 2035 Help

### Amend Measures

Certificate 5149

#### Current Measures

UMR: 9F4v47e9Y9C [Copy UMR](#)

Sub-installer TRXK  Subcontractor Installer name

Installation was completed?  Measure Type

#### Property Construction

Current Property Construction  Change Property Construction

This will impact all measures

#### Requested Amends

**Property Construction**  
You are not making changes to the property construction.

**Measures**  
You are not making any measure amends.

#### Submit

By submitting

- you confirm that the information provided is accurate
- you agree to pay the lodgement update fee (£4.00 +VAT)
- a new certificate will be issued
- you agree that you will inform your funder of the changes.

I accept the terms above.

[Submit amend](#)

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- Before submitting changes and paying, the amendments are shown to ensure that what has been changed is correct:

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Home New Lodgements PAS 2035 Help

### Amend Measures

Certificate 5149

#### Current Measures

UMR: 9F4v47e9Y9C [Copy UMR](#)

Sub-installer TRXK  Subcontractor Installer name

Installation was completed?  Measure Type

#### Property Construction

Current Property Construction  Change Property Construction

This will impact all measures

#### Requested Amends

**Property Construction**  
You are amending property construction from: **Traditional, not protected - solid wall** to: **Conventional, not high rise, not protected - cavity wall**.

**Measures**  
UMR: 9F4v47e9Y9C  
You are amending Measure Type from **Cavity wall insulation (0.027)** to: **Cavity wall insulation (0.033)**  
You are amending Measure Date from: **22/06/2021** to: **24/06/2021**  
You are amending Sub-Installer TRXK from: **822432** to: **237237**

#### Submit

By submitting

- you confirm that the information provided is accurate
- you agree to pay the lodgement update fee (£4.00 +VAT)
- a new certificate will be issued
- you agree that you will inform your funder of the changes.

I accept the terms above.


[Submit amend](#)

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5. The 'View' lodgement function will show an audit of the changes that have been made:

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My Account Logout

Home New Lodgement PAS 2035
Help

Your measure amends have been successfully completed

[Back](#)

## Viewing ECO Lodgement

Certificate #5149

**Lodgement ID:**  
9fc11559-9869-499a-9dda-a89bc7a5723c [Copy](#)

**Certificate:** 5149 [Copy](#)

Address	Owner	Lodgement	Property
The Square Arena Business Centre TrustMark (2008) Limited Basingstoke England Hampshire RG21 4EB	<b>Tenure:</b> Owner Occupied  <b>Name:</b> Nicola Walker  <b>Contact number:</b> 0333 595 0358  <b>Email address:</b> nwalker@trustmark.org.uk	<b>Created:</b> 22/02/2022 13:53:00  <b>Status:</b> Complete  <b>Created by:</b> test@trustmark_03_c162408 @mailinator.com  <b>Payment amount:</b> £38.00  <b>Paid on:</b> 22/02/2022	<b>Construction:</b> Conventional, not high-rise, not protected - cavity wall  <b>Detachment:</b> Detached  <b>Type:</b> House

### PAS 2035 Roles

TMLN	Role	Business
	<b>Property Construction</b> Conventional, not high-rise, not protected - cavity wall	<b>Scheme Provider</b> Demo Scheme Ltd

### Work Completed

Work	Key Dates	Product	UMR
<b>Type:</b> Cavity Wall Insulation Cavity wall insulation (0.033) <b>PAS Standard:</b> PAS 2030:2017 <b>PAS Annex:</b> B1 <b>Sub-installer TMLN:</b> 1624513 <b>Certificate Text:</b> Mismatching_Testing_22022022 <b>ECO Measure name:</b> CWI_0.033  <b>Guarantee Details:</b> CIGA 25 Year Guarantee <b>GHGS Name:</b> Cavity wall insulation	<b>Install:</b> 22/06/2021 <b>Handover:</b> 24/06/2021	Mismatcher_22022022	9Ffv47e9VBc <a href="#">Copy UMR</a>

[Amend](#)

### Previous Amends

Requested date	Amends																		
22/02/2022 14:20	<p><b>UMR 9Ffv47e9VBc</b> <a href="#">Copy UMR</a></p> <table border="1" style="width: 100%; border-collapse: collapse; font-size: x-small;"> <thead> <tr> <th>Field</th> <th>Original</th> <th>New</th> </tr> </thead> <tbody> <tr> <td>Handover date</td> <td>22/06/2021 01:00</td> <td>24/06/2021 01:00</td> </tr> <tr> <td>Measure type</td> <td>Cavity wall insulation (0.027)</td> <td>Cavity wall insulation (0.033)</td> </tr> <tr> <td>PAS annex</td> <td>B1</td> <td>B1</td> </tr> <tr> <td>Standard</td> <td>PAS 2030:2018</td> <td>PAS 2030:2018</td> </tr> <tr> <td>Sub-installer TMLN</td> <td>1624513</td> <td>2337207</td> </tr> </tbody> </table>	Field	Original	New	Handover date	22/06/2021 01:00	24/06/2021 01:00	Measure type	Cavity wall insulation (0.027)	Cavity wall insulation (0.033)	PAS annex	B1	B1	Standard	PAS 2030:2018	PAS 2030:2018	Sub-installer TMLN	1624513	2337207
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6	Insurance guarantee	Guarantee Document_Testing_21022022.docx		15.67 KB	22/02/2022 14:04:30	<a href="#">View Document</a>
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9	Referre design	2035_Test_Doc_22022022.docx		15.65 KB	22/02/2022 14:06:19	<a href="#">View Document</a>
10	Claim of compliance PAS2030	2035_Test_Doc_22022022.docx		15.65 KB	22/02/2022 14:05:58	<a href="#">View Document</a>

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