

Structured Retrofit (ECO 4 etc.)				
Document	PAS2030:2019 / MCS & PAS 2035			Notes
	Path A	Path B	Path C	
Assessment				
Advice report	o	o	o	
Assessment Report	Y	Y	Y	pre installation RdSAP xml
Project Creation				
Intended Outcomes	Y	Y	Y	
Improvement Option Evaluation	y	Y	Y	Required for all pathways
Medium Term Improvement Plan	y	Y	Y	Required for all pathways
Risk Assessment	Y	Y	Y	
Pre-Design Building Survey	Y	Y	Y	PAS2030 measures
Retrofit Design	Y	Y	Y	Design must cover all measures, thermal bridging, ventilation and defect resolution
Significance Survey	Y	Y	Y	where Traditional construction
Lodgement Stage				
Claim of Compliance PAS2030	If PAS	If PAS	If PAS	
MCS Compliance Certificate	if MCS	if MCS	if MCS	
Evidence of submission to CPS	Conditional	Conditional	Conditional	Where applicable
Handover documents for Client	Y	Y	Y	Encouraged
Claim of Compliance PAS2035	Y	Y	Y	Covering the progress to date
Guarantee / Insurance	Y	Y	Y	Must cover all measures
Other commissioning certificates	o	o	o	if not part of handover document
Pre-Installation Building Inspection	Y	Y	Y	PAS2030 measures
Mid-install Inspection	o	o	o	requested where available
Commissioning Checklist	o	o	o	
Other	o	o	o	With description
Project Completion				
Claim of Compliance PAS2035	Y	Y	Y	
Post Installation RdSAP xml	Y	Y	Y	
Other	o	o	o	With description
Contract / Invoice	o	o	o	
Post Completion				
Monitoring and Evaluation outcomes	Conditional	Conditional	Conditional	Appropriate level post completion as conducted

Key		
	Y	Mandatory
	o	Optional, but encouraged
	Conditional	See notes
	Declaration	Provision needs to be declared although upload not required