



**TRUSTMARK**  
Government Endorsed Quality

TrustMark (2005) Limited  
Data Warehouse  
Lodgement Data Amendment Policy

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## 1. Background

- 1.1 This Policy sets out the obligations of parties intending to directly amend or request amendment of data that the requestor has previously lodged as an Installer or a Retrofit Coordinator.
- 1.2 This Policy document is written to enable you to remain compliant with TrustMark's requirements.
- 1.3 All intended actions and subsequent amendments must satisfy this 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.

## 2 Definitions And Interpretation

- 2.1 For the purposes of this document, you need to be aware of the following terms and expressions and these should be interpreted as follows:

**“Amending”, “Amendment”, “Amend”** – the process of changing data.

**“Certificate Number”** – the number generated by TrustMark when a lodgment is complete, and a certificate of Lodgment is generated.

**“Data”** – The documentation or information lodged in the Data Warehouse in relation to a property or work conducted therein.

**“Data Dictionary”** – the publicly available spreadsheet that contains all data pertaining to the work and trade codes for measures to assist with lodgement (see section 6.1)

**“Data Warehouse”** – The repository of information about work undertaken and lodged with TrustMark.

**“Installers”** – The person or organisation that is completing / has completed work.

**“Lodgement”** – The process of filing documentation or information into the Data Warehouse.

**“Measure”** – An energy efficiency installation in a property.

**“Retrofit Coordinators”** – A qualified end-to-end project coordinator in respect of works that improve the energy efficiency of property.

**“Superseding”** – A process of changing data that has previously been lodged into the TrustMark Data Warehouse.

**“TMLN”** – The TrustMark Licence Number issued to an Installer or Retrofit Coordinator.

**“UMR”** – The Unique Measure Reference, an identifier generated by TrustMark for each work item (measure) lodged into the Data Warehouse.

**“WorkType ID”** – the column within the Data Dictionary that contains the codes used for measures to lodge work in the Data Warehouse.

### 3 The Data Warehouse

3.1 The Data Warehouse is the online portal accessed by Installers and Retrofit Coordinators for the purpose of lodging data and documents in respect of installations and works at properties.

3.2 Access to the Data Warehouse is only possible for currently trading Installers and Retrofit Coordinators.

3.3 Consequently, the ability to lodge data in the Data Warehouse is only possible for TrustMark Registered organisations.

3.4 Interaction with the Data Warehouse is likely to include the following example scenarios:

- 3.4.1 Initial Lodgement of work; or
- 3.4.2 superseding (replacing) a Lodgement; or
- 3.4.3 amendment of data in respect of a Lodgement; or
- 3.4.4 deletion of a lodgement

3.5 This Policy document refers to scenarios in 3.4.1, 3.4.2, 3.4.3 and 3.4.4 above. Subsequent amendment of data and/or documentation and/or information within the Data Warehouse is only possible in certain restricted circumstances and for specific purposes. The data and information lodged into the Data Warehouse is provided in line with The Terms of Use and Privacy Notice and on seeking to amend data, therefore requires the scenarios featured in both Tables 1 AND 2 below and excludes other scenarios featured. As follows:

**TABLE 1:**

<b>Access To and / or Amendment of Data Permissible where supersede function is not available</b>	<b>Access To and / or Amendment NOT Permissible</b>
You are an installer who holds active registration with TrustMark and the relevant measure(s) at the time of the lodgement; or	You are a Third Party e.g., Supplier, Managing Agent
You are currently trading as an installer who held TrustMark registration at the time of the lodgement and the relevant measure(s); or	You are not currently trading as an installer
You are a retrofit coordinator who holds active registration with TrustMark, and the installing business holds the relevant measure(s) at the time of the lodgement; or	You are not currently trading as a retrofit coordinator
You are currently trading as a retrofit coordinator who held registration with TrustMark, and the installing business held the relevant measure(s) at the time of the lodgement; or	
<b>And; The data was lodged by you</b>	
<b>And; You are only seeking to amend a derivative of the previously lodged measure</b>	

**TABLE 2: All of the following requirements must be satisfied:**

<b>You have a ‘TMLN’ which can be validated against current or previous registration</b>
<b>You can provide the Certificate Number and UMR(s) relating to the lodgement</b>
<b>You have provided satisfactory evidence to TrustMark with regards to you having lodged the data.</b>

3.6 IMPORTANT: You are therefore, only permitted to access and/or amend data in the Data Warehouse in circumstances that meet the requirements of Table 1.

3.7 IMPORTANT: You cannot therefore, access and/or amend data without also having satisfied the requirements of Table 2.

3.8 Any circumstance outside of either Table 1 or 2 shall be handled by TrustMark and a conclusion reached, on a case-by-case basis.

#### **4 Data Warehouse Terms of Use**

4.1 You are additionally required to have knowledge of and comply with the provisions set out in the current Data Warehouse Terms of Use, applicable at the time of seeking a Data Warehouse amendment. This related document can be found via the TrustMark website (<https://www.trustmark.org.uk/privacy>).

#### **5 Self Service edit function**

5.1 Under certain criterion, amendments can be made within the Data Warehouse using the self-service facility, to do this please locate the appropriate lodgement and select 'Amend', this will allow you to update the variant of measure type, property construction and other aspects where validation is possible.

#### **6 Data Warehouse Amendment Process**

6.1 Where the self-service 'amend' function is not available and before any amendments are actioned the conditions of Table 1 and 2 must be met and you must provide:

Clear instruction of what needs to change and why. This will include:

- UMR
- Certificate number
- Description of change with exact data item to be amended
- 'WorkTypeID' as detailed in the Data Dictionary

<https://www.trustmark.org.uk/tradespeople/data-warehouse/data-dictionary>

If you are TrustMark registered, you can download this information from the Data Warehouse landing page into an Excel spreadsheet.

If you are no longer TrustMark registered, you may be able to obtain a spreadsheet with your lodgements from your supply chain partners. *Under certain circumstances, TrustMark may be able to provide this.*

6.2 For lodgements where the Data Warehouse requires amending, ensure that:

- The Declaration of Conformity (DOCC) or PAS / MCS Declarations of conformity and financial protection mechanism documents have been uploaded into the Data Warehouse where applicable and if not, these must be included as part of your amendment request
- Email the lodgement spreadsheet and documents (or provide link to appropriate secure shared area) to: [dwhamendment@trustmark.org.uk](mailto:dwhamendment@trustmark.org.uk)

6.3 On receipt of the data, TrustMark will:

- 6.3.1 Review the list of requested amendments against the defined criteria & requested detail
- 6.3.2 Populate a narrative column against the received Excel file with any additional requirements or why an amendment will not be actioned
- 6.3.3 Action amendments and upload an audit entry for documents that may be missing from the original lodgement
- 6.3.4 Return the original spreadsheet with final commentary

## 7 Data Warehouse Amendment Pricing

7.1 An £8.00 + VAT charge will be applicable for each lodgement that requires TrustMark to make the amendment. Once the number of lodgements has been identified, an invoice will be issued, and this will be required to be settled before any amendments will be made. Where there is a large volume of amendments you may wish to contact TrustMark to discuss.

7.2 Lodgements that require TrustMark to amend may take 28-business days to process once any invoice(s) have been settled.

## 8. TrustMark Contacts

8.1 In the event that you need to liaise with someone at TrustMark, to ask specific questions and/or to discuss something connected to or outside of the contents of Tables 1 and 2, you are advised to contact the Compliance Department, via [dwhamendment@trustmark.org.uk](mailto:dwhamendment@trustmark.org.uk).

8.2 To assist us with your enquiry please ensure that you provide:

Your name

Telephone number

Business name

TMLN

Where applicable, the information requested in section 6.