

# Data Warehouse

Retrofit Scheme Systems & Lodgement  
v1.01

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## Changelog

Date	Version	Status	Author	Reviewed by	Notes
19.02.2020	0.1	Initial draft	P Vaughan	D Colley	
19.02.2020	1.0	Superseded	P Vaughan		Distributed to Retrofit Scheme Working Groups and TrustMark.org.uk
24.02.2020	1.01	Issued	P Vaughan		Correction to Overview

# 1. Overview

Retrofit Assessor and Coordinator Schemes have indicated that they will require their members to provide information into their platform before submission into the Data Warehouse so that they have visibility of their members work and can perform quality checks as appropriate.

This requires software development and integration by the schemes. PAS2030:2019 businesses are now operating and have a need to lodge work immediately. Until schemes have integrated, work can be lodged directly into the Data Warehouse.

This short paper sets out the mechanism by which Schemes will have the ability to determine when their members shall be forced into using their platforms.

# 2. Proposal

Utilise the trade codes submitted by schemes in their csv to indicate the mechanism of lodgement that is permitted.

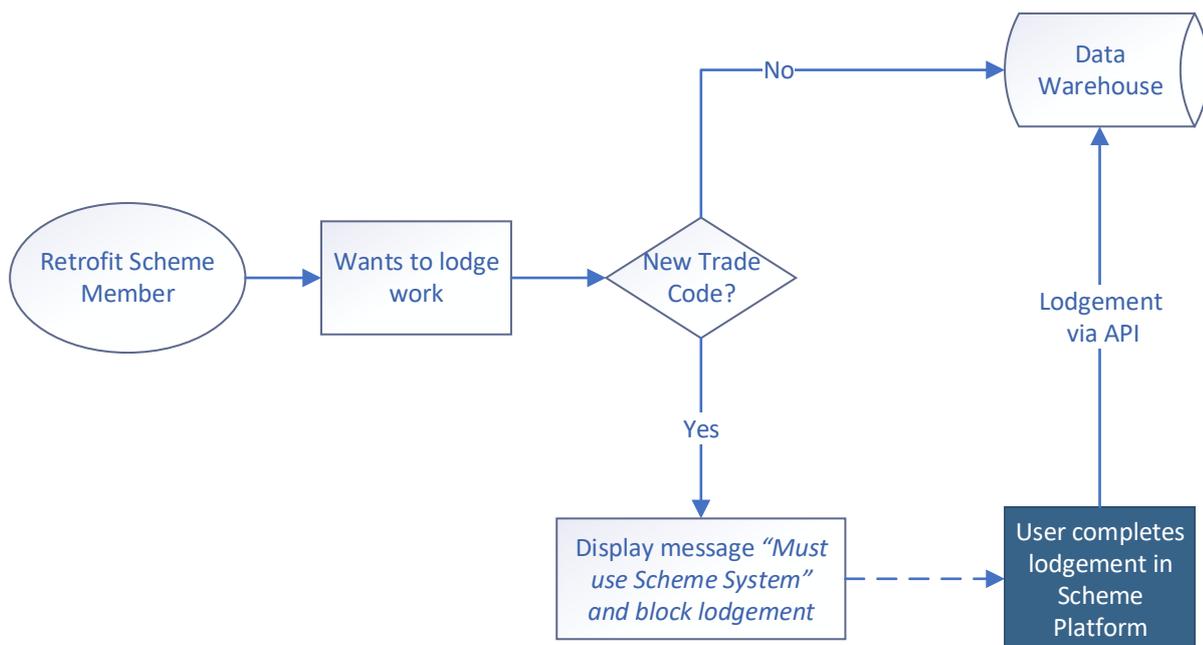


Figure 1 - proposal overview

All retrofit schemes will be expected to use their systems within 3 months - end May 2020.

Status	Description	TrustMark Trade Code	Lodgement Method
Current	Retrofit Assessor	120	Direct into Data Warehouse
Current	Retrofit Coordinator	121	Direct into Data Warehouse
New	Retrofit Assessor PAS2035	147	Via scheme platform
New	Retrofit Coordinator PAS2035	148	Via scheme platform

Where the new trade codes are provided for a business:

- PAS2035 / PAS 2030:2019 lodgement will not be permitted in the Data Warehouse and the scheme platform must be used.
- A message / notification will be presented in the data warehouse home page *"Your Retrofit Scheme requires that all Retrofit activity is lodged via their system."*

### **Principles**

- Schemes will send over either the current or new trade codes.
- A business will not be permitted to use both methods.
- If both are submitted in error the new code will take precedent and lodgement via scheme platform will be the only option.

### **Benefits**

- Transition in control of schemes
- Short term support for both mechanisms to aid supply chain transition to PAS2030:2019 / PAS2035

### **Dis-benefits**

- During the transition to Retrofit Scheme Platforms customers may see both Trades (i.e. Retrofit Coordinator and Retrofit Coordinator PAS2035) and businesses would only be returned for the relevant trade. However, the prominence of the PAS2035 nomenclature will drive adoption of the new method.