



Notes:

This document has been created to provide a simple overview of PAS2035 and the key actions of the various parties in the process.

This must be used in conjunction with PAS2035:2019.

The same person can perform multiple roles if suitably qualified and conflict of interest managed.

TrustMark has set out to utilise the Data Warehouse as the repository for the various reports in the supply chain simplifying the process by reducing the requirements for local record keeping and establishing a single point of reference for a job.

Conventions used:

- Numbers in square brackets relate to clauses in the standard where further guidance can be found e.g. [6.1]
- Numbers below an arrow symbol relate to documents and the Data Warehouse.

Id	PAS2035 clause	Title	Documentation & Roles Matrix					
			Advisor	Assessor	Designer	Installer	Retrofit Coordinator	Evaluator
1		Advice report	Y	Y	Y	Y	Y	
2	[7.1]	Risk Assessment		Y	Y	Y	Y	
3	[6.2]	Intended Outcomes			Y	Y	Y	Y
4	[8]	Assessment Report		Y	Y	Y	Y	
5	[9]	Retrofit Design			Y	Y	Y	
6	[9.2.2]	Improvement Option Evaluation (Pathway B & C)			Y		Y	Y
7	[9.2.10]	Medium Term Low Carbon Plan (Pathway B & C)					Y	Y
8	[12.1]	Handover documents for Client				Y	Y	
9	[11.3]	Claim of Compliance PAS2030				Y	Y	
10	[6.1.4]	Claim of Compliance PAS2035					Y	
11	[14]	Monitoring and Evaluation outcomes					Y	Y
12	[12.1.2]	Guarantee				Y	Y	
13		Other	Y	Y	Y	Y	Y	Y

denotes

- Mandatory
- Mandatory can be part of Assessment
- Non-Mandatory