

### CLAUSE 4 – INSTALLATION PROCESS

#### 4.1 Method statement (R)

- Installation process of each Energy Efficiency Measure (EEM) defined and recorded in a Method Statement prior to installation commencement (includes and take into account elements described in 4.2 - 4.12).



#### 4.2 Energy efficiency measure design specification

- Location-specific design specification obtained (4.2.1)
- MS identifies the relevant PAS2030 Annex and makes provision for its requirements (4.2.2)



#### 4.3 Installation Location Information

- MS must obtain information to enable effective installation of the EEM
- This information includes (but is not limited to):
  - The interrelationship between different types of EEM
  - Specific customer requirements
  - Confirmation that necessary guarantees and warranties are in place.

#### 4.4 Installation methods

- Preference given to material provided by the EEM manufacturer, or set out in the relevant Annex
- If methods cannot be obtained then commencement shall be deferred until an alternative has been issued.

#### 4.5 Installation equipment and tools (R)

- The MS defines suitable equipment, relevant to the installation process as defined in 4.4 and said equipment will be available to operatives at the time of the installation (4.5.1 & 4.5.2)
- Any equipment requiring calibration shall be in accordance with the manufacturer's specification, with calibration records being retained, including mid-installation re-calibration (R, 4.5.3)
- All equipment shall be suitably maintained (4.5.4)



#### 4.6 Checking, handling and storage

- Installer must be aware of EEM-specific handling and storage requirements and effectively implement them

#### 4.7 Provision of installation instructions to operatives

- Operatives must have sufficient information to complete the installation to the required specification, including (but not limited to) system specifications, relevant standards and repair instructions



#### 4.8 Intermediate inspections

- The MS shall include necessary facilities to accommodate any required intermediate inspections



#### 4.9 People (R)

- The installer shall determine levels of competence required by operatives for specific tasks, ensure only competent operatives undertake installation tasks, provide sufficient training and maintain accurate and current training records (R 4.9.2)
- Provide operative supervision that is compliant that specified in the relevant EEM-specific PAS Annex (4.9.2)

#### 4.10 Engagement of subcontractors

- The installer shall be responsible for ensuring conformance of subcontractors

#### 4.11 Commissioning (R)

- Ensure the EEM(s) is commissioned according to specified requirements (manufacturer's instructions, design specification and relevant statutory regulations) and to keep records of commissioning activities (R)



#### 4.12 Handover (R)

- A handover procedure shall be established to be undertaken when the installation is fully commissioned and any defects corrected
- Under the Green Deal, this process will be undertaken according to instruction from the Green Deal Provider (GDP).
- If outside the Green Deal remit, the handover procedure will provide information including (but not limited to) safe and efficient operation, care and maintenance of the EEM
- The installer shall ensure sufficient competence of operatives undertaking the handover and the process will include, where practicable, a physical viewing and in-situ explanation of the EEM and its operation etc.
- Handover documents provided to the customer(s) and copies retained by the installer to ensure access to copies of these documents for installation under the green deal (R)

#### 4.13 Installation control (P, R)

- The installer shall operate a procedure to validate that completed installations conform to the EEM specifier's specification etc. (see clause 4.4) and shall keep records of installation control outcomes for each EEM installed (P, R)



#### 4.14 Installation documents and record keeping (P, R)

- The installer shall operate a procedure to demonstrate that the method statement (see clause 4.1) has been followed (P)
- Records associated with the installation activities shall include details of any authorised changes (see clause 5.4) (R)

## **CLAUSE 5 – INSTALLATION PROCESS MANAGEMENT**

### **5.1 Operation and process oversight**

- The installer shall operate a procedure to ensure that EEM installations are undertaken and completed to the EEM Specifier's specification, to the customer's satisfaction and in accordance with PAS2030

### **5.2 Pre-installation survey (R)**

- A pre-installation survey shall be undertaken on the basis of the method statement (4.1) to confirm that the EEM can be safely and effectively installed, with a record of the survey being retained by the installer
- Suitability and completeness of the method statement (4.1) and design specification (4.2) shall be checked as part of the survey.
- Any already-installed safety alarms will be tested and their suitability assessed and their status recorded in the survey report
- Any animals or plants found during the survey that may be subject to special protection must be included in the report and their presence made known to the Installer and the GDP
- Potential installation problems identified in the survey must be communicated to the EEM Specifier and any relevant statutory authorities, work must not commence until a mutually agreed solution has been reached and received in writing by the installer from the EEM specifier.



### **5.3 Action in respect of intermediate inspection**

- The installer shall establish and operate a procedure to ensure that work that might impede an intermediate inspection (see clause 4.8) shall not continue until the inspection is complete and clearance to continue issued

### **5.4 Installation process change**

- Variation(s) to the method statement to be defined, documented and agreed by the EEM specifier (5.4.1) and any related tasks reviewed to ensure continued compatibility (5.4.2)
- All internal feedback, is to be documented prior to taking corrective action and decisions to not take corrective action must be documented, including justification (5.4.3)

### **5.5 Process continuity plan**

- In the event that an installer cannot complete an installation, arrangements must be in place to facilitate the transfer of installation processes to another suitable installer

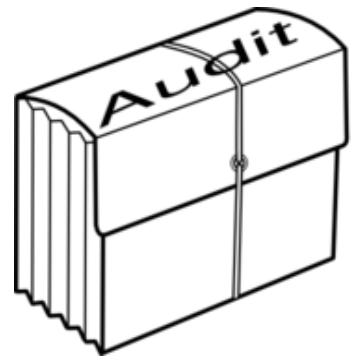
### **5.6 Process control (P, R)**

- The installer shall operate a documented procedure to demonstrate that the requirements of PAS2030 have been met for each installation (including installation control – see clause 4.13) with a record of each completed process control procedure maintained for each installation (**P R**)



### 5.7 Internal audit and corrective action (P, R)

- A procedure for internal auditing of installation processes by the installer shall be established implemented and documented. Each type of installation process should be audited at least once in a 12-month period (P, R 5.7.1)
- The cause and consequences of non-conformances should be identified and documented (5.7.2), rectified through corrective action (5.7.3) and the effectiveness of said action verified (5.7.3) (R)



### 5.8 Installation process records (R)

- The installer shall keep records containing (at minimum) the information identified in this clause (5.8 a-j) for a minimum of 6 years (R)

### 5.9 Business and financial probity (R)

- The installer shall be able to cover liabilities arising from activities undertaken under the scope of PAS2030, and financial stability and business resources likely to sustain the operation of service.

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## CLAUSE 6 – SERVICE PROVISION

### 6.1 Complaints procedure (P, R)

- The installer shall operate a documented complaints procedure for receiving, recording and addressing complaints from customers and the GDP and, under the Green Deal, transferring customer complaints to the GDP and confirming the complaint has been addressed by the GDP. (P, R)



### 6.2 Interaction with customers

- The installer shall operate a procedure to instruct operative how to respond to customers in respect of (but not limited to) customer service requirements, requests for information, feedback and complaints

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## CLAUSE 7 – CLAIMS OF CONFORMITY (R)



The installation of each energy efficiency measure claimed to be in compliance with the requirements of PAS2030 shall be supported by a declaration of conformity to PAS2030 issued to the customer (R)

Expressed in the form:

The installation of [energy efficiency measure] at [location of installation] handed over on [date of handover] has been undertaken by [name of installer] using an installation process complying with PAS2030:2014, including Annex(es) [insert references to relevant measure-specific annex(es)]