Homelife User Manual

Contents

1. Getting Started

Homelife is a comprehensive project management IT toolkit for managing contract processes for PAS 2035 projects from end to end. Homelife provides an opportunity for everyone involved in a project to collaborate efficiently by sharing and contributing information across a common process driven platform. Homelife is designed to manage and control the various stages, tasks and compilation of documentation required throughout the life of a project. The software is based on the PAS2035 road map made up of a number of tasks and sub-tasks which are delivered according to an agreed timescale. Users responsible for delivering the tasks and sub-tasks are provided with appropriate access and have their own user areas within the software to help them deliver their tasks. For example; managing specific processes, collecting and storing information and communicating with other team members.

1.1 Logging in

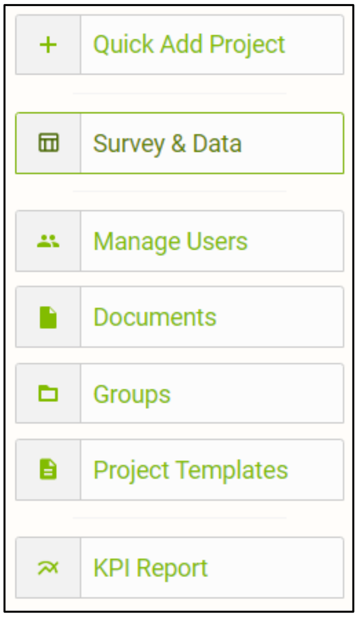
1. To login, browse to https://homelifesoftware.com/Account/Login

2. Enter your username and password and click Login

1.2 Overview

1.2.1 Settings

When logging into the software you will see all existing projects on the main screen. To the left of these are the settings buttons which enable you to add new projects and manage users, documents and templates. Please see below for an overview of the use of each button.



Quick Add Project allows you to quickly add a new project.

Survey & Data takes you to your linked Lifespan Housing account.

Manage Users takes you to the user management section.

Documents allows you to add template documents.

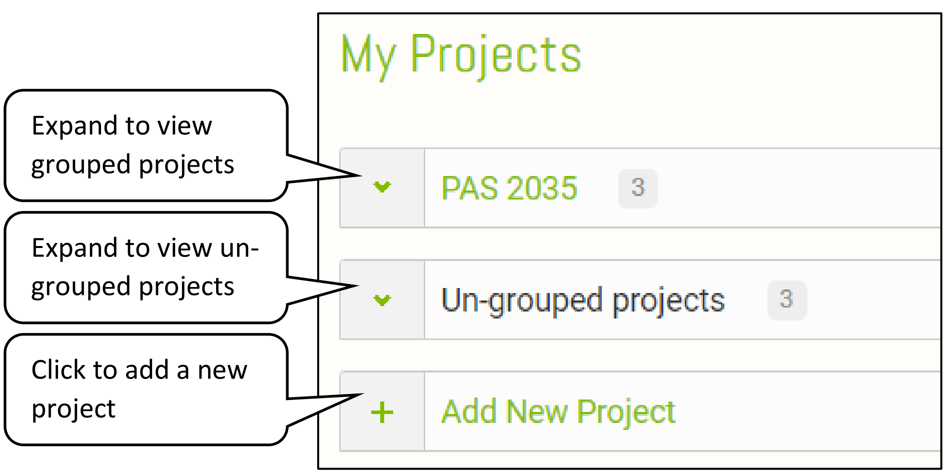
Groups allows you to group projects together.

Project Templates allows you to create and manage project templates.

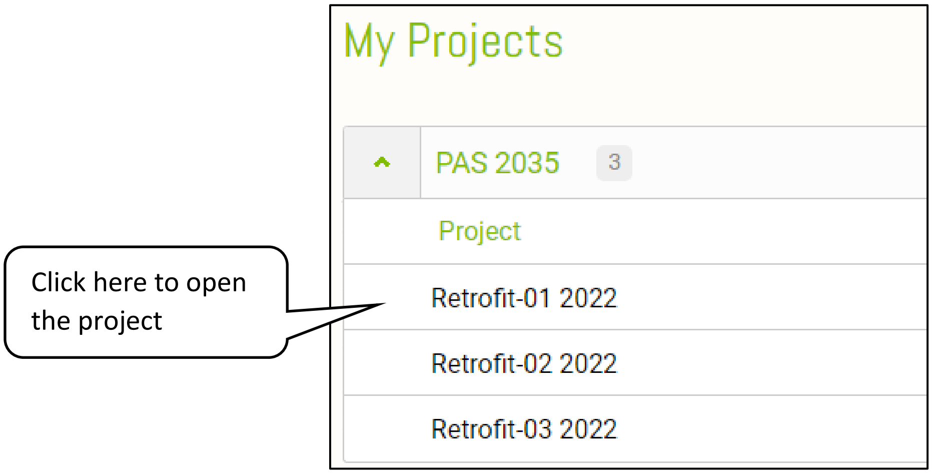
KPI Report allows you to generate a comprehensive KPI report based on data from a specific project or group for a selected timeframe.

1.2.2 My Projects

1. Your projects are displayed in groups.

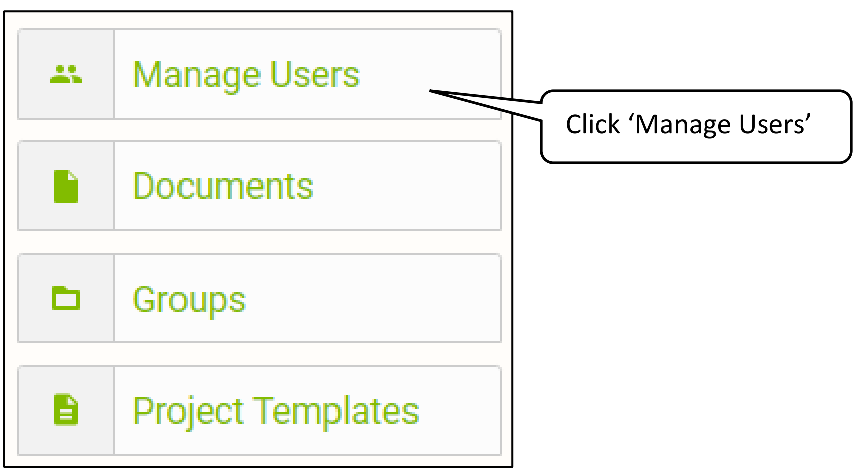


2. Once you have expanded a list of projects you can open a project by clicking on its title.



2. Managing Users

To manage users, click on **Manage Users**



2.1 Adding New Users

1. Click on the **New User** button

2. Fill in the details for the new user

3. Pick a username for the user. By default, this will be *Forename.Surname*

4. Select a password for the new user. The user will be required to change their password upon their first log-in.

    a. *Default Password* - The default password of 'Project' will be assigned to the new user. This is the simplest, but least secure option.

    b. *Random Password* - A random password, combining numeric and alpha-numeric (including upper and lowercase) letters.

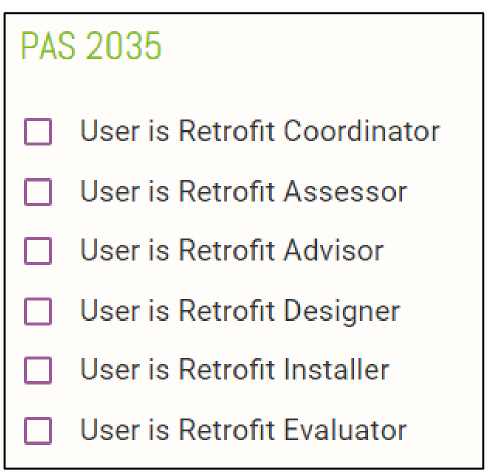
5. If you would like an email to be sent to the new user immediately, tick the 'Send Welcome Emails' box. If you wish to provide the user with their access details at a later date, leave this clear.

6. Choose what permissions you would like to assign the new user;

    a. *User can create projects* - the new user will be a project manager and can create new projects as well as manage users

    b. *User can manage tasks* - the new user will be able to access a project and will appear in the task manager option lists for any of your project tasks

7. Choose whether the user should be assigned to a specific PAS 2035 role, this will determine what information they will have access to for any PAS 2035 projects.



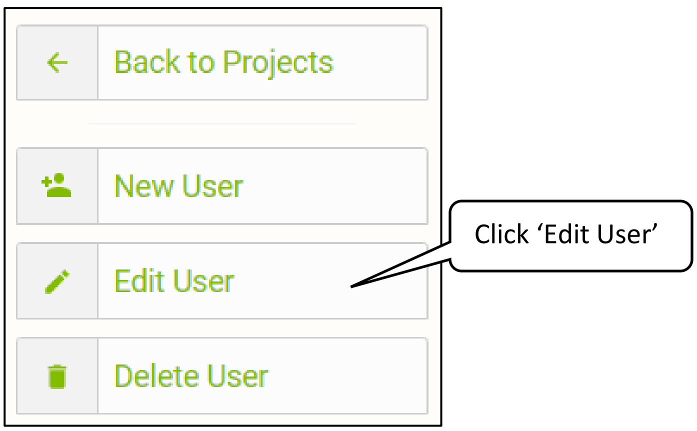
8. Click on '**Create User**' button

By default, new users won't be able to access any existing projects. You will need to assign this new user to each of the projects you want them to access, as well as configuring which project 'Objects' you would like them to see. There is an option of linking the user to a permission group which would automatically update the list of projects and objects they have access to defined by the group settings.

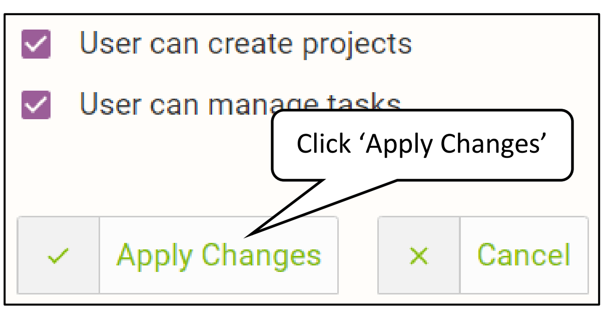
NOTE Only project managers can create new user accounts.

2.2 Editing Users

1. Select the user you wish to edit.
2. Click the **Edit User** Button



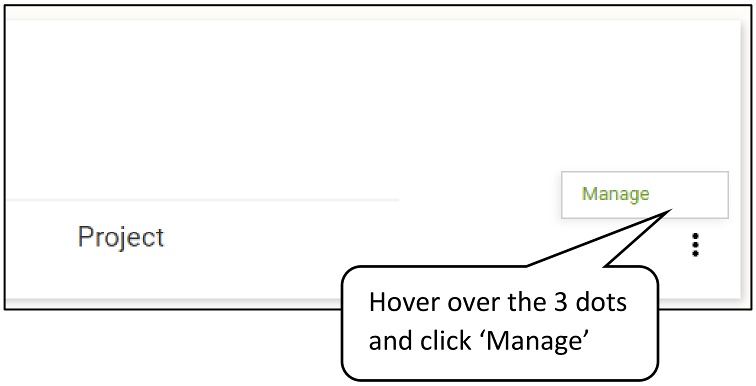
3. Make any required changes and click on **Apply Changes**.



2.3 Setting User Access rights to a project

1. Select the user you wish to set access rights for and navigate to the 'Project' tab.

2. Hover your mouse over the menu button then select ‘Manage’.



3. For each project in the list, choose what level of access the user should have.
4. Click ‘Apply Changes’.

2.4 Assigning User Access to Objects

Every project can have different objects which are assigned to the client’s company.

If you need to enable/disable objects to a user so that the user can see or change the object's data, perform the steps below.

1. From your '**My Projects**' click on 'Manage Users' button.
2. Select a user from the list for which you want to manage the objects.
3. From the **Object Access** widget select 'Manage' from the widget menu.
4. Select a project from the list for which you want to manage the objects for the user you selected in step 2.
5. For each object, choose what level of access user should have for the selected project.
6. Click on button 'Apply Changes' to submit changes.

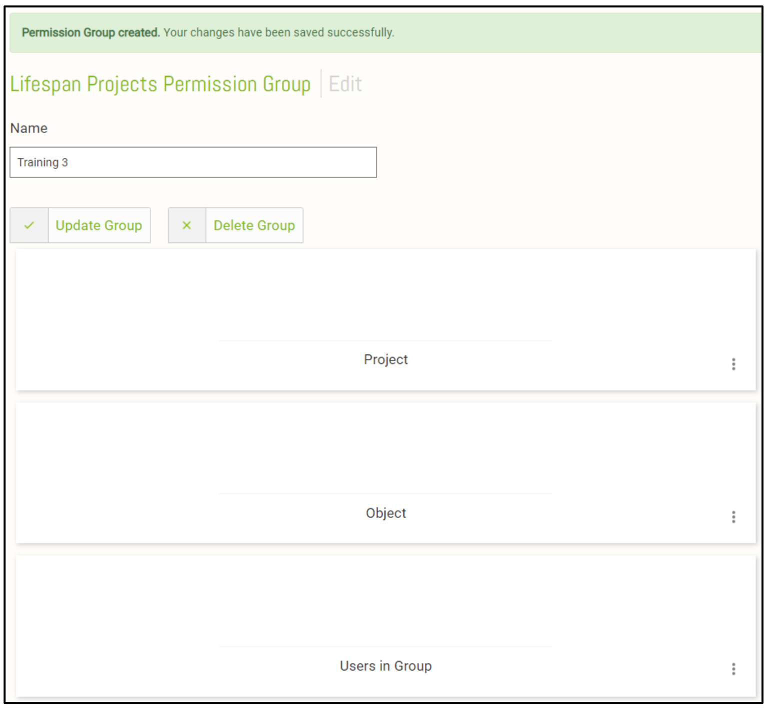
2.5 Permission Groups

Permission groups allow you to easily manage the permissions for a selected number of users. Instead of having to choose the level of access for projects and objects for each user, you just do it once for the group so when the user is added they have the same level of visibility as the other members.

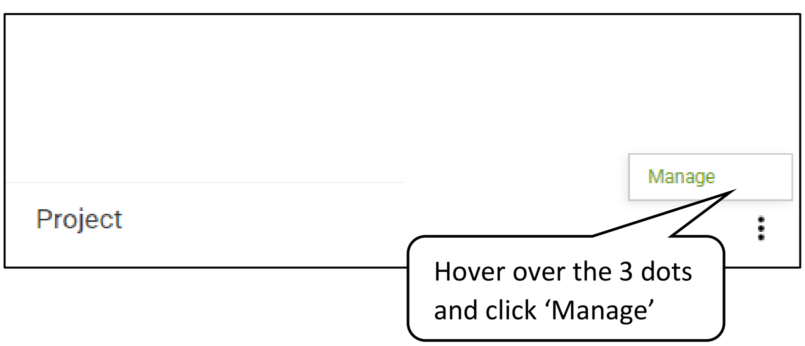
To set up a new group.

1. From your '**My Projects**' click on 'Manage Users' button.
2. Go to ‘Permission Groups’.
3. Select ‘New Group’
4. Type in the name of the group you wish to add and click ‘Create Group’.

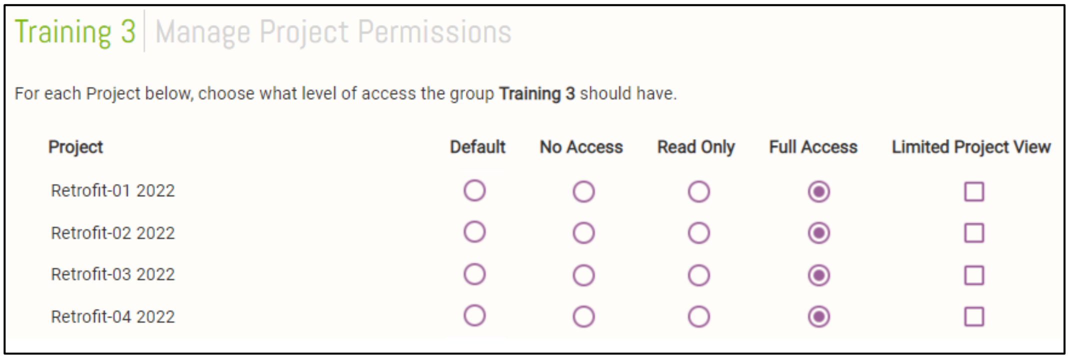
You are taken to the ‘Edit’ screen and from here you can amend the name of the group, along with viewing or editing the linked projects, objects and users.



5. Now you have created your group, you can add the projects you want to include and set the objects required for each of them. Go to the project tile and select ‘Manage’.



6. The full list of projects in the database will show and from here you can choose the level of access you want to give to the account for each of them. Just click in the circle/square icon under the appropriate column for each project. Once this has been done, press '**Apply Changes**' at the bottom of the screen.



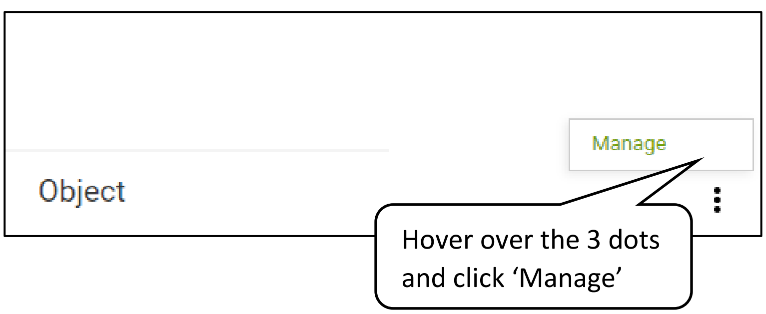
No Access – the project will not appear in any of the user accounts linked to this group.

Read Only – the user will be able to view the project but will only be able to make changes to the tasks for which they are responsible.

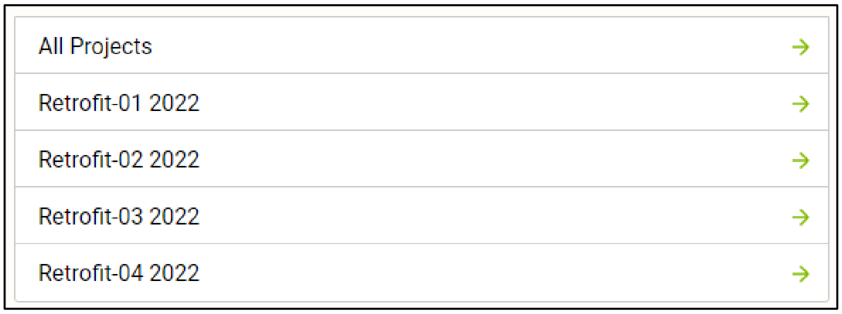
Full Access – the user will be able to view the project and all tasks associated with it, however, they will still only be able to make changes to the tasks for which they are responsible.

Limited Project View – the user will be able to view the project; however, they will only be able to see the tasks they have been assigned to.

7. To set the objects, go to the object tile and select 'Manage'.



8. The list of projects for the group will be shown as below, giving you the option to add objects to projects individually by choosing a specific one, or to apply the same objects to each one by selecting 'All Projects'.

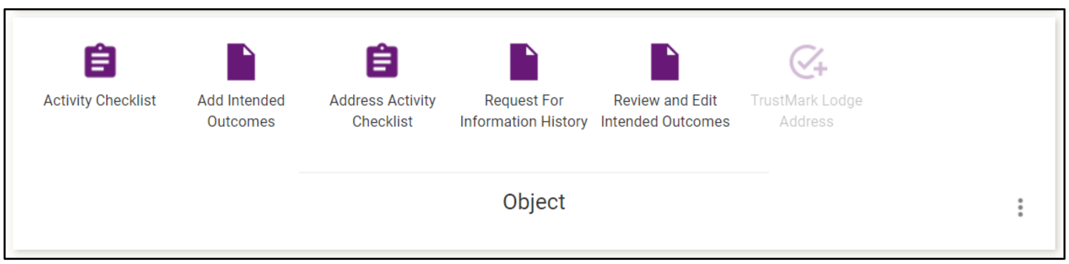


9. Once you have selected either one or all projects to set the objects for, another list will show allowing you to select the level of access required for the users within the group.

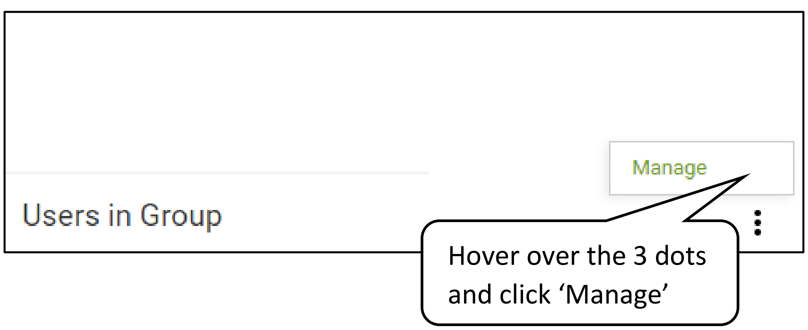
You are provided with options of either ‘No Access’, ‘Read Only’ or ‘Full Access’ for each object.

10. Click in the circle icon under the appropriate column for each object. Once this has been done, press ‘**Apply Changes**’ at the bottom of the screen.

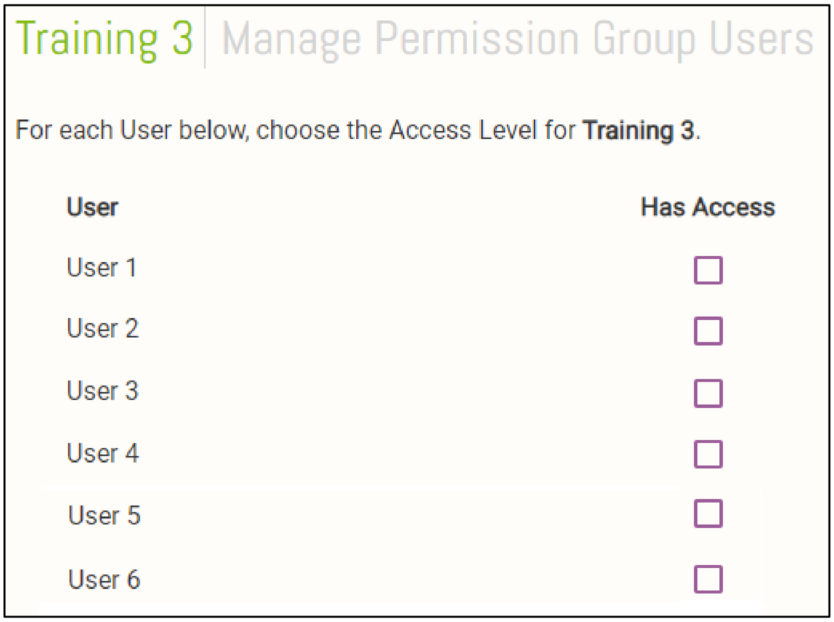
Back in the group page, the icons will now appear in the objects tile. Here you will see all of the objects you have selected as either ‘read only’ (faded icons) or ‘full access’ (opaque icons).



11. To add users to the group, go to the object tile and select ‘Manage’.



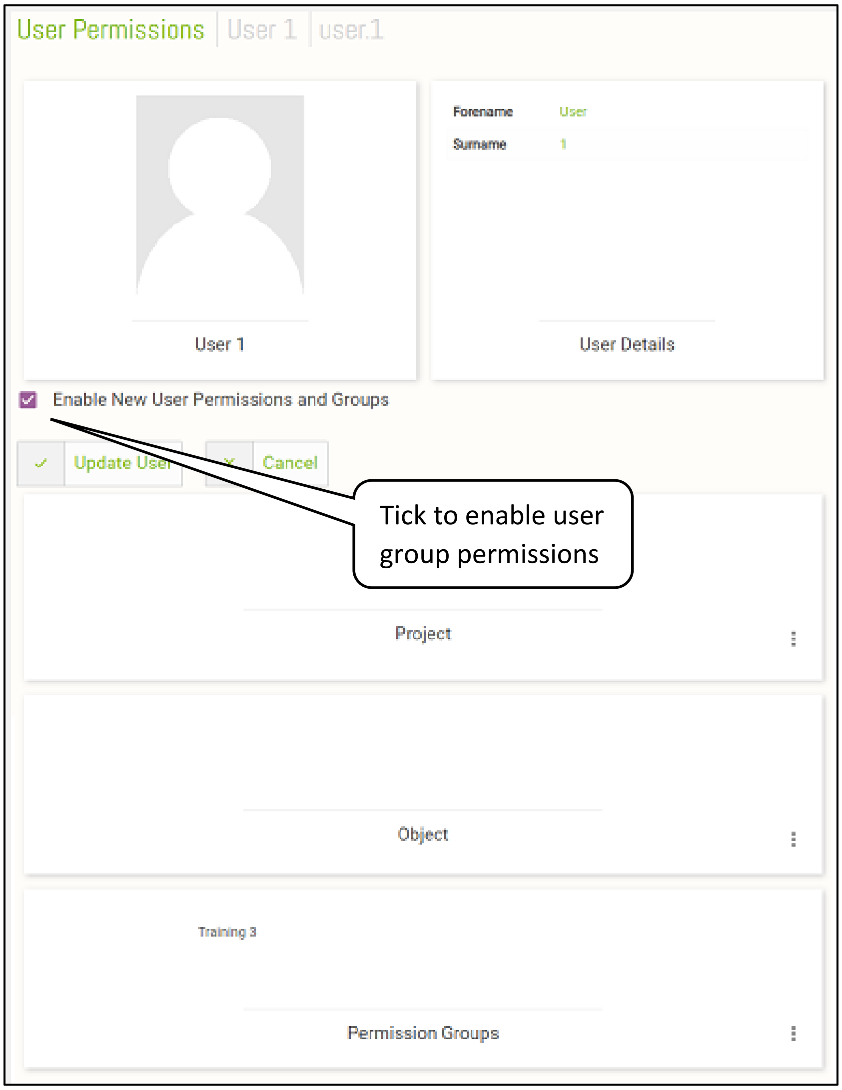
This will bring up a list of all users in the database. From here just tick under the ‘Has Access’ column for each user you want to add to the group. Once done, click ‘**Apply Changes**’ at the bottom of the screen to confirm.



2.6 User Permissions

Within 'User Permissions' you can go into each user account separately to make any necessary changes. Once you have set up a new user (please refer to section **2.1 Adding New Users**) the details will be available in user permissions.

1. From your '**My Projects**' click on 'Manage Users' button.
2. Click on 'User Permissions' and select the user required.
3. Tick the box next to 'Enable New User Permissions and Groups'. This will ensure the user has the permissions linked to the group they are included in.



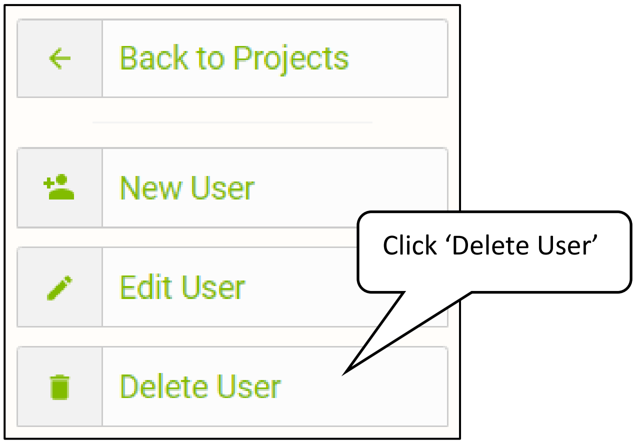
This screen shows details for the user, including all projects, objects and the permission groups they are linked to. As shown above, User 1 is in the group 'Training, which means they will have all of the permissions connected to this group – even though the tiles are empty for 'Project' and 'Object'.

NOTE Any projects/objects included in user permissions will override the permissions set for the group, so if the user has been given access to additional objects here, these will also be visible in their group projects.

2.7 Deleting Users

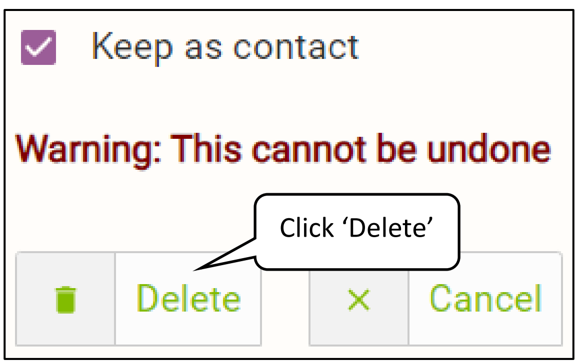
1. Within 'Manage Users', select the user you wish to delete.

2. Click ‘Delete User’



3. If you wish to keep the user as a contact tick the ‘Keep as contact’ box, otherwise leave it unticked.

4. Click ‘Delete’.

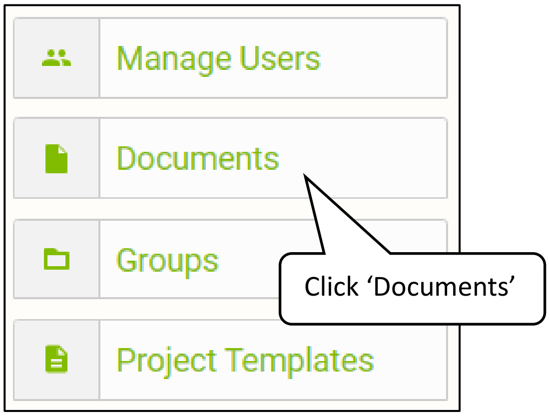


NOTE Once you have deleted a user the original account cannot be restored.

3. Documents

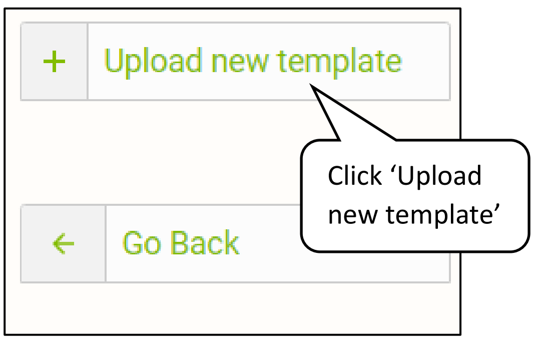
The document section shows all existing templates available for use within the software. From here you can edit or delete an existing document or upload a new document template.

1. Click into ‘Documents’.

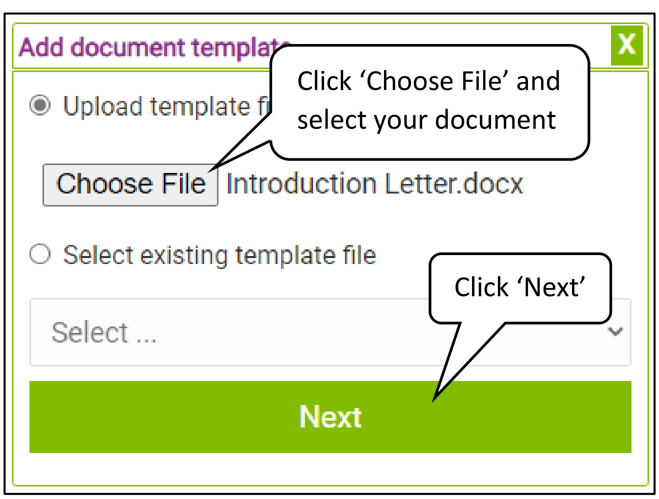


3.1 Adding a new template

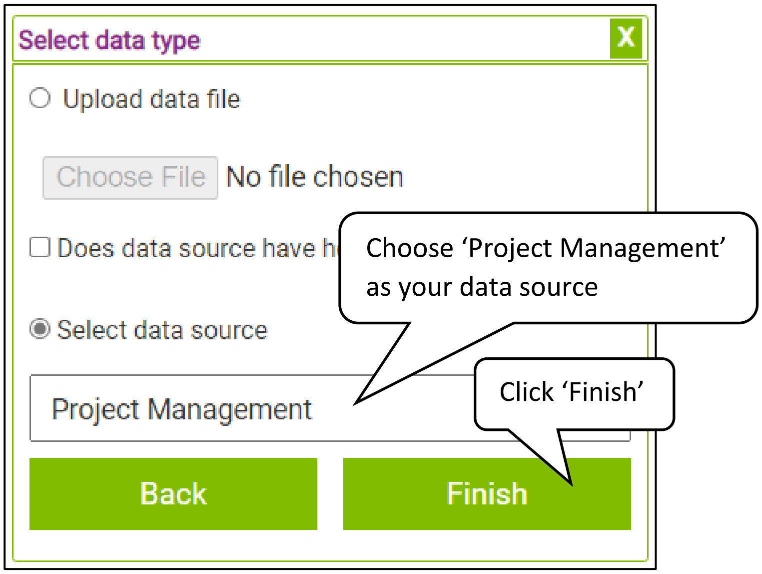
1. Select 'Upload new template'.



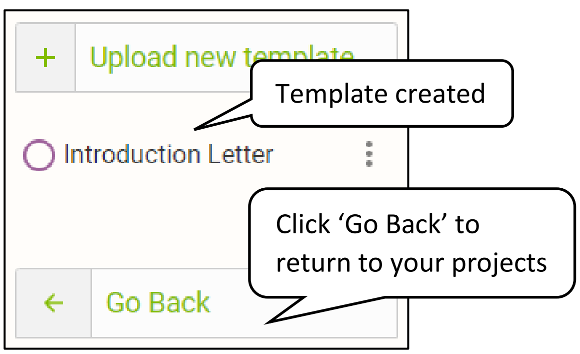
2. The following dialog box will appear, click 'choose file' and browse your computer files to select the document you want to use as your template.



3. You will now have to select your data type, click next to 'select data source' and choose 'Project Management' from the drop-down list to use information from projects to populate your data fields.

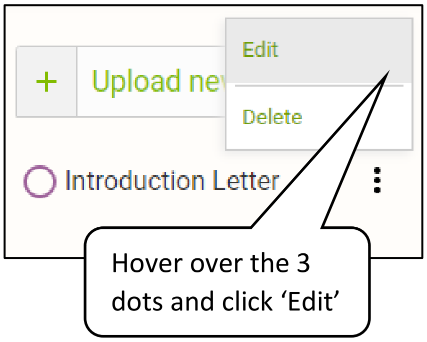


4. Your template will now appear at the bottom of the list on the left and will be available to use within your projects.

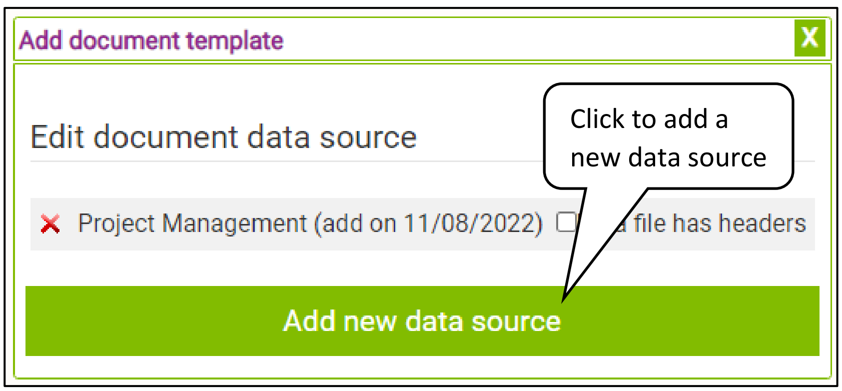


3.2 Editing an existing template

1. Go to the template you want to amend, hover over the three dots to the right of the listing and click 'Edit'.



2. The box below will appear enabling you to change the data source for the template. Click 'Add new data source' to change where software populates the data fields from.

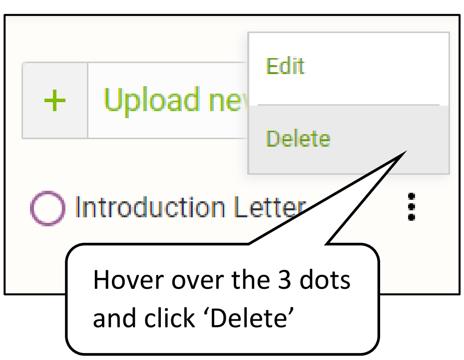


3. Enter the new details and click finish.

NOTE This is to amend the data source, not the template. To change the template, delete the existing one and re-upload using the revised document.

3.3 Deleting an existing template

1. Go to the template you want to remove, hover over the three dots to the right of the listing and click 'Delete'.

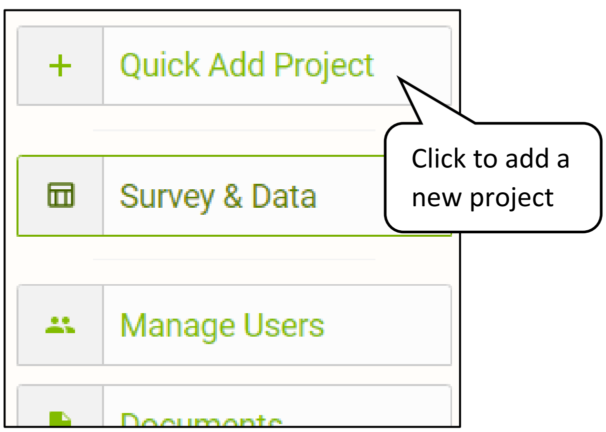


2. When prompted, click 'Remove' to delete the template. The template will now have been removed from the document list and will not appear as an option to choose in any of your projects.

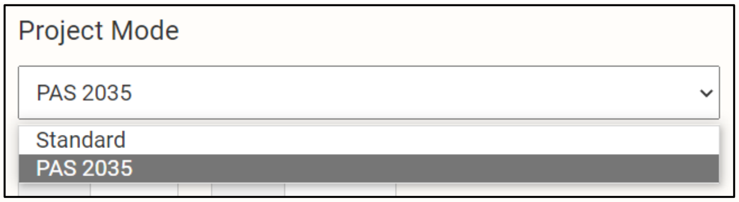
4. Project Administration

4.1 Creating a new project

1. To set up a new project, click 'Quick Add Project'.



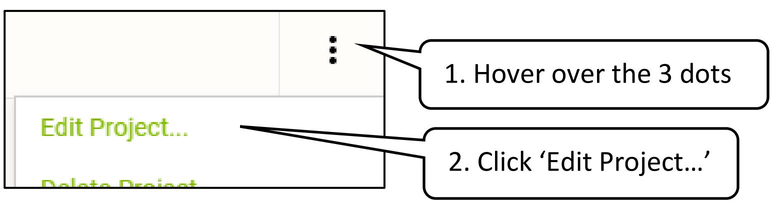
2. Fill in all the information that is requested. Project name and reference are free text fields and the start date can be entered in either manually or by opening the calendar icon to select a specific date. At this point you can select to use an existing template, use the drop-down list provided to select a template. If you have any existing groups set up, these will appear under the 'Group' field so you can assign your project to a specific group – this will define the order you see your projects on the main screen. Project mode should be entered from the drop-down list as 'PAS 2035'.



3. Click ‘Save’ to return to the main screen and your project will now be displayed either within the specified group or with you other un-grouped projects.

4.2 Editing a project

1. From the main screen, click on your project to open it. In the top right of the screen under your login credentials you will see 3 dots, hover over this to see the options for your project.
2. Select ‘Edit Project’ from the list to access the project information.

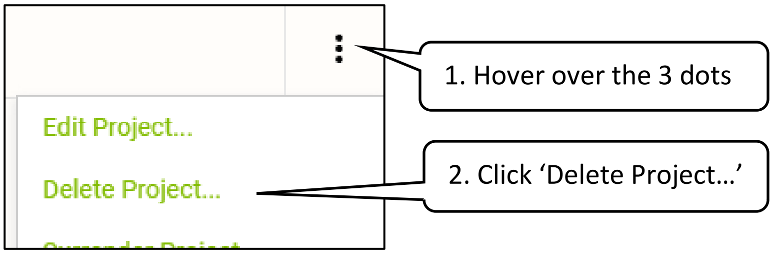


3. Make any amendments or updates as required.
4. Click on the 'Save' button to apply your changes.

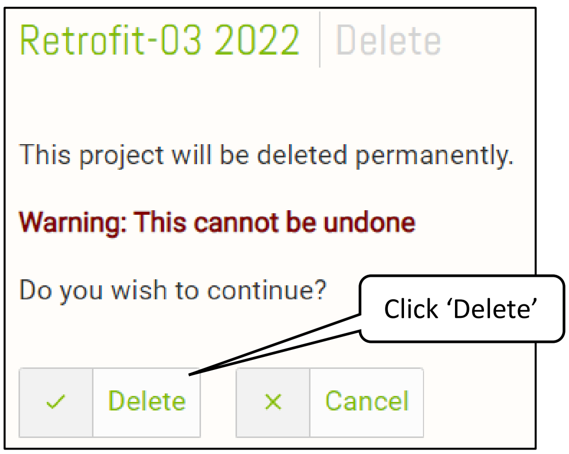
NOTE Within the edit screen if you change the status of the project to ‘Complete’, this will automatically delete all existing tenant information for the project. For data protection these details are removed and cannot be restored.

4.3 Deleting a project

1. From the main screen, click on your project to open it. In the top right of the screen under your login credentials you will see 3 dots, hover over this to see the options for your project.
2. Select ‘Delete Project’ from the list.



3. This will prompt a confirmation box to appear to ensure you definitely want to delete the project and any associated data.
4. Select ‘Delete’ to remove the selected project from Homelife.

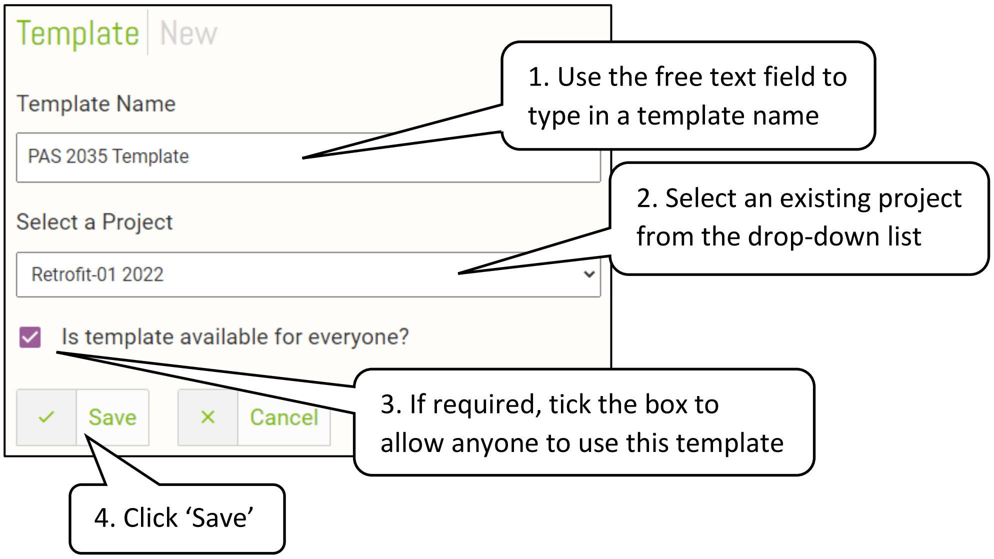


4.3 Managing Project Templates

This section allows you to create templates from existing projects, which will appear within the ‘Template’ drop-down when setting up a new project.

4.3.1 Creating Project Templates

1. In the “My Projects” page go to Project Templates and click ‘New Template’.
2. Enter the template name.
3. Select the project you want to use as a template from the drop-down list (you can choose to set up any of your existing projects as a template).
4. Click ‘Save’.



4.3.2 Editing Project Templates

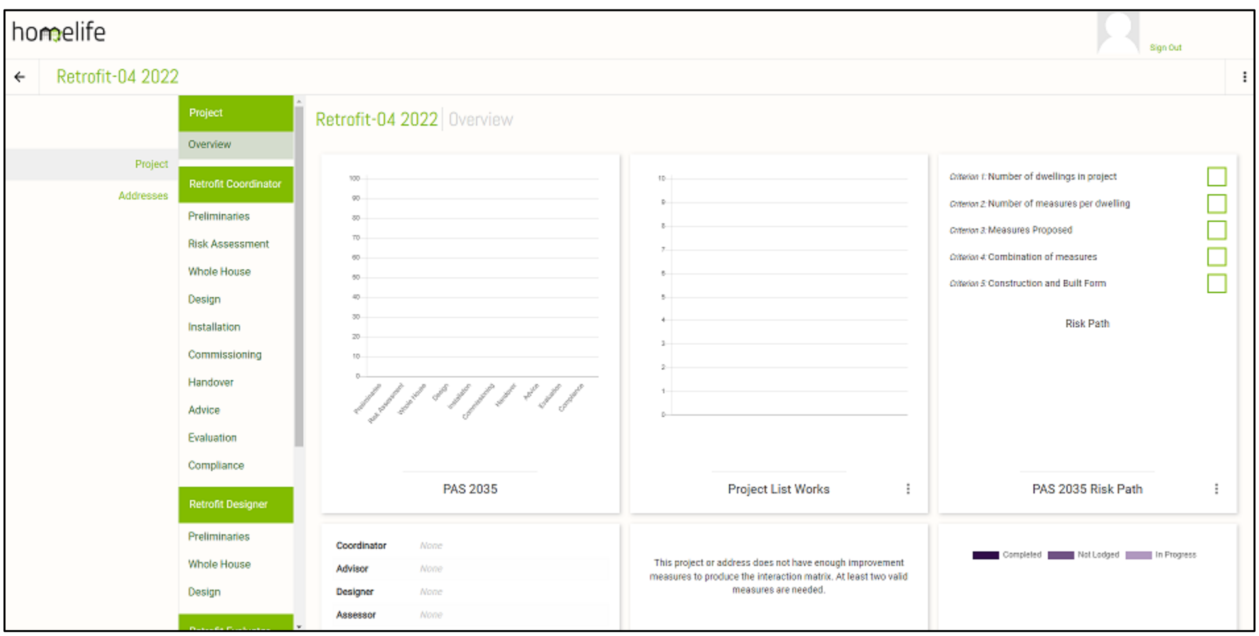
1. Within the 'Project Template' screen, select the template you want to edit from the list to display the details on the right.
2. Click 'Edit Template' from the options on the left of the screen.
3. Make the required changes, you are given the option to amend the template name and update the access rights to either private use or for every user.
4. Click 'Save'.

4.3.3 Deleting Project Templates

1. Within the 'Project Template' screen, select the template you want to delete.
2. Click 'Delete Template' from the options on the left of the screen.
3. This will prompt a confirmation box to appear to ensure you definitely want to delete the chosen template.
4. Select 'Delete' to remove it.

5. Managing your project

This section will describe how to manage your project, including updating the risk path, adding and updating works, assigning appointments, adding and reviewing information requests and specifications.



5.1 Inserting Addresses

The first task to complete is to insert your project addresses into Homelife, which can be done from within Lifespan Housing Web. Using your Lifespan Housing account, follow the instructions below to add properties into any of your projects.

1. Log into Lifespan Housing Web

2. Click on either the '**Quick**' or '**Custom**' filter button

3. In the filter window that has now opened, build up your filter so that it will result in only the properties that you intend to import into Lifespan Projects

4. Apply the filter and verify your address now list contains only the properties that you want.

5. Click on the '**Stock Profile**' tab

6. Click on the '**Lifespan Projects**' button

7. In the window that has now opened, choose an appropriate option, then click '**Continue**'

a. *Highlighted Property* - Choose this if you only want to send the single, currently highlighted property

b. *Ticked Properties* - Choose this if you want to send only the properties you have "ticked" in the address list

c. *All Properties* - Choose this if you want to send all properties that appear in your address list

8. Choose the project where you would like to add the properties

9. Tick the box if you wish to send across any accompanying works (these will appear in the 'planned works' section of projects for each address) – this enables you to choose works within a selected date range. This will also send across the schedule of rates from Lifespan Housing, which will be in addition to those already set in projects.

10. Click '**Send to Project**'.

11. If you don't want to add the selected addresses to any current projects, there is an option to create a new one by selecting 'create a new one' and filling out the required details. Clicking 'continue' will send the addresses to your new project.

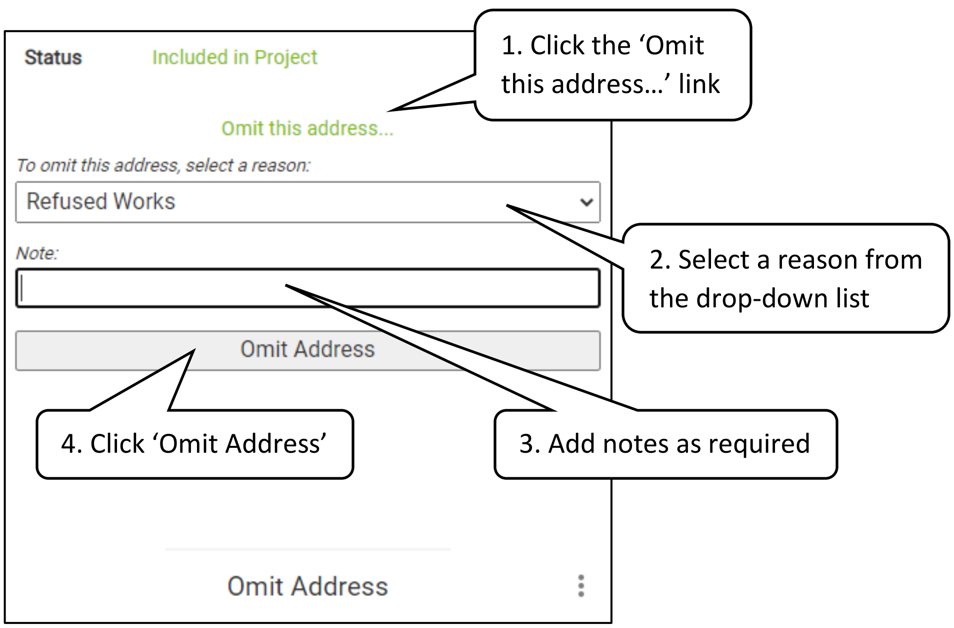
When filtering your address list from within Lifespan Housing Web, do not worry if you can't get an exact address list, as you can send properties in batches (they do not have to go all at once), or you can make use of one of the three '**Send**' options in step 7 whereby you can "tick" properties to narrow your selection down even further.

NOTE If you cannot see or access the Lifespan Projects button, this will most likely be due to a lack of permissions. Please speak with your organisation's Lifespan Housing Web administrator who can grant you the appropriate rights.

5.2 Omitting Addresses

If your project is linked with Lifespan Housing and you have imported a list of addresses into it, you may at some point find the need to remove an address from that project. Instead of permanently deleting the address task(s) from the project and therefore losing all the information stored up to that point, you can instead omit it from the project so that the information is retained but is not included in the project anymore.

1. Within the project, go to the ‘Addresses’ tab and select the property you want to omit.
2. Go to ‘Overview’
3. Locate the 'Omit Address' widget
4. In the widget, click on the 'Omit this address...' link
5. From the drop-down list that is now shown in the widget, select the reason why you are omitting this address.
6. Add any supporting notes as required
7. Click the 'Omit Address' button
8. Click ‘Yes’ on the ‘Remove Address’ confirmation box to omit the address

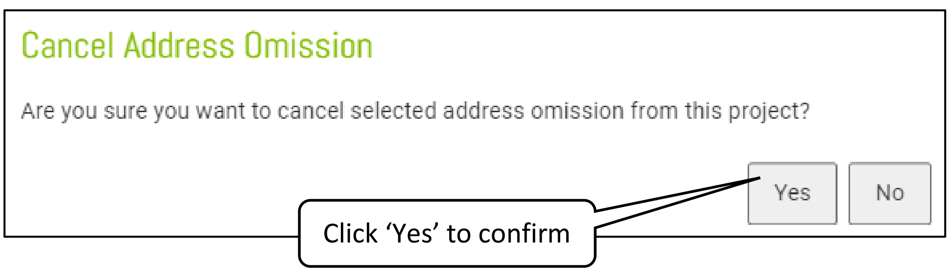


The address will now be omitted from the project but will still be present in the full project address list so it can be referred to if needed. The list of omission reasons is retrieved from Lifespan Housing using property attribute pick-list values (if this list is blank, please contact us as it may be that no attribute has been configured for your account). When an address is omitted, the reason will be added against the property in Lifespan Housing through the linked attribute.

If for any reason an address has been omitted by mistake, or needs to be added back into the project, this can be done easily by working through steps 1-3 as above to get to the ‘Omit Address’ widget.

The tile will show as below, enabling you to see the status, reason, omission date and any notes. To cancel the omission and re-instate the address, click 'Cancel Address Omission'.

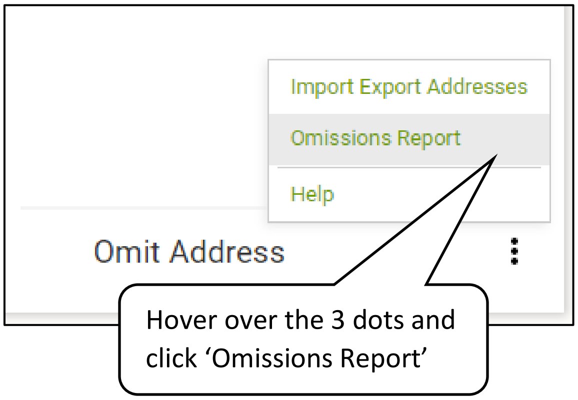
A dialog box, as shown below, will appear as confirmation you wish to continue and cancel the status of the address selected. Click 'Yes' to confirm, this will add the selected property back into your project.



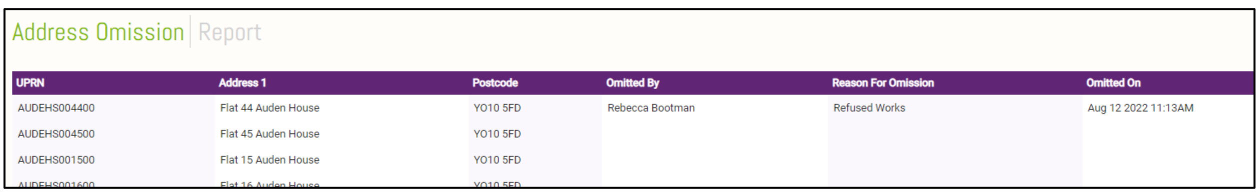
NOTE Only project managers can omit addresses and cancel omissions.

To review details of any omitted addresses, an address omission report is available through the 'Omit Address' tile.

1. Within the omit address tile, hover over the 3 dots and select 'Omissions Report'.



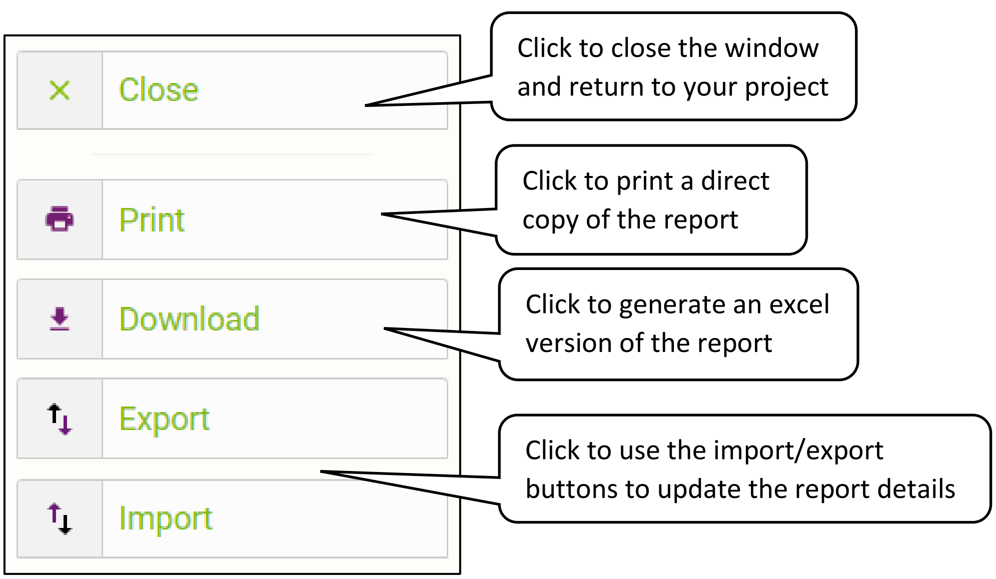
The report will open in a new window. On the main screen you will see a list of the project addresses, one per row, followed by the omission details to the right. This will give you visibility of the user who omitted the property, with the reason and date of omission.



Address Omission | Report

UPRN	Address 1	Postcode	Omitted By	Reason For Omission	Omitted On
AUDEHS004400	Flat 44 Auden House	YO10 5FD	Rebecca Bootman	Refused Works	Aug 12 2022 11:13AM
AUDEHS004500	Flat 45 Auden House	YO10 5FD			
AUDEHS001500	Flat 15 Auden House	YO10 5FD			
AUDEHS001600	Flat 16 Auden House	YO10 5FD			

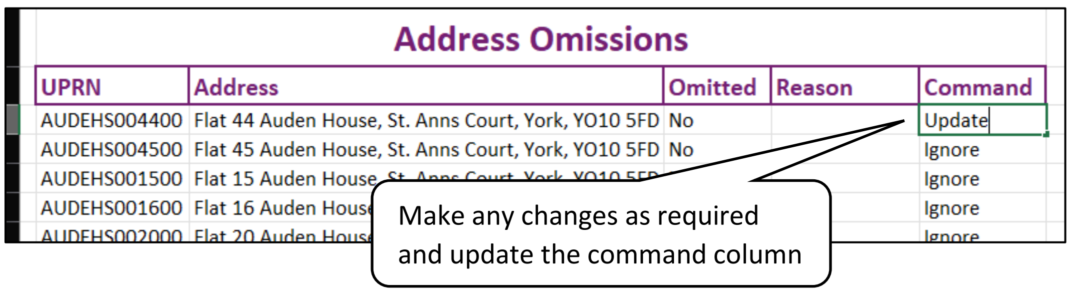
2. To the left of the screen, you have additional options enabling you to export the data by printing directly from the software or downloading in spreadsheet format. Please see details below.



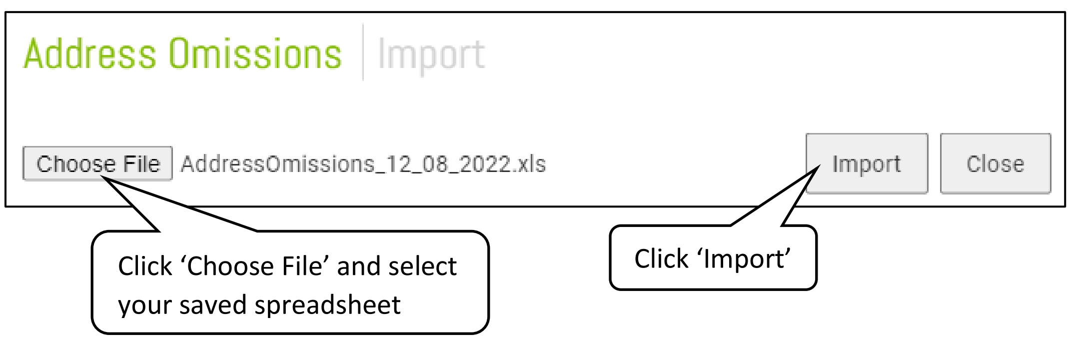
3. The last two buttons are used to update the data via import/export sheets. These can be used to update any of the omission details for either one or multiple addresses. Click on 'Export' to extract the data.

4. Open the spreadsheet and make any changes as required.

5. Use the command 'Update' in the command column field for any affected rows, ensuring any unchanged rows are populated with the command of 'Ignore'.



6. Save your spreadsheet and return to Homelife. This time click on 'Import' and choose the relevant file. Click 'Import' to apply the changes.



7. Any updates will now be reflected in the omissions report and omit address tile for the relevant addresses.

5.3 Deleting an address

Although omitting an address will remove data being shown in projects, it will still carry through information collected and details of the omission back to Lifespan Housing. There may be cases where you wish to remove the address entirely from a project. This can be done by using the import/export function within the Omit Address widget.

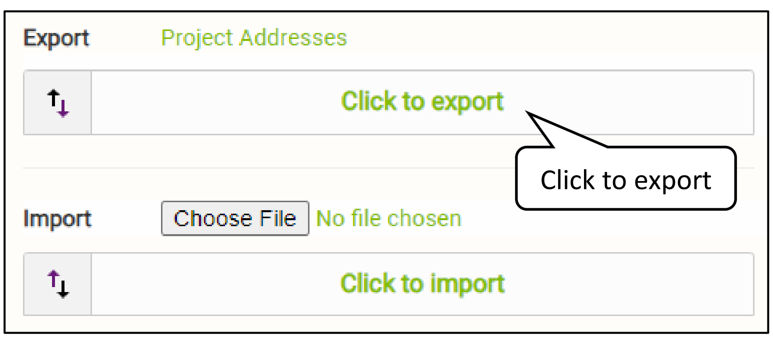
1. Open the project that contains the addresses you want to delete.

2. Select any address and go to 'Overview'.

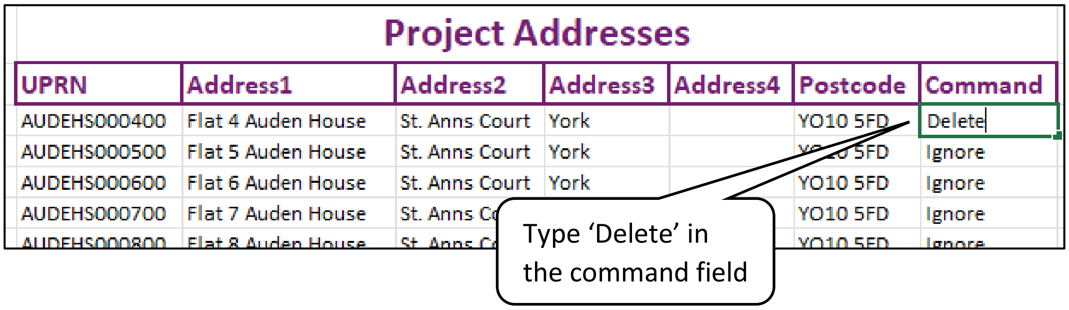
3. Locate the 'Omit Address' tile. Here you have the option to either omit an address (see 4.4.2), review the omissions report (excel download), or import/export addresses.

4. Hover over the three dots in the bottom right and select 'Import Export Addresses'.

5. On the next screen you will have the option of exporting or importing a file. Click to export, this will download and excel spreadsheet containing a list of all properties associated with the project.



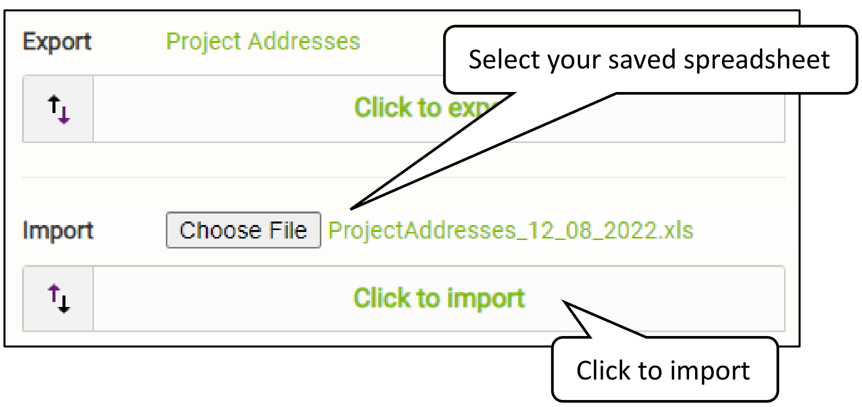
6. The 'Command' field has been pre-populated with 'Ignore', meaning you don't have to do anything with the addresses you want to keep in the project. For any property you want to remove from the project, just type 'Delete' in the command field on the corresponding row as shown in the example below.



Project Addresses						
UPRN	Address1	Address2	Address3	Address4	Postcode	Command
AUDEHS000400	Flat 4 Auden House	St. Anns Court	York		YO10 5FD	Delete
AUDEHS000500	Flat 5 Auden House	St. Anns Court	York		YO10 5FD	Ignore
AUDEHS000600	Flat 6 Auden House	St. Anns Court	York		YO10 5FD	Ignore
AUDEHS000700	Flat 7 Auden House	St. Anns Co			YO10 5FD	Ignore
AUDEHS000800	Flat 8 Auden House	St. Anns C			YO10 5FD	Ignore

As you can see above, just one property needs to be deleted and the command column has been updated accordingly. The software will skip over anything being ignored and just change anything with the value showing as 'Delete'.

Once you have made your required changes, save the spreadsheet and go back to the import/export screen in projects. This time go to 'choose file' under import and select your saved spreadsheet, then press 'click to import'.



The properties you have chosen to remove will have now been deleted and will no longer show in the list of addresses in this project.

NOTE Only project managers can delete addresses.

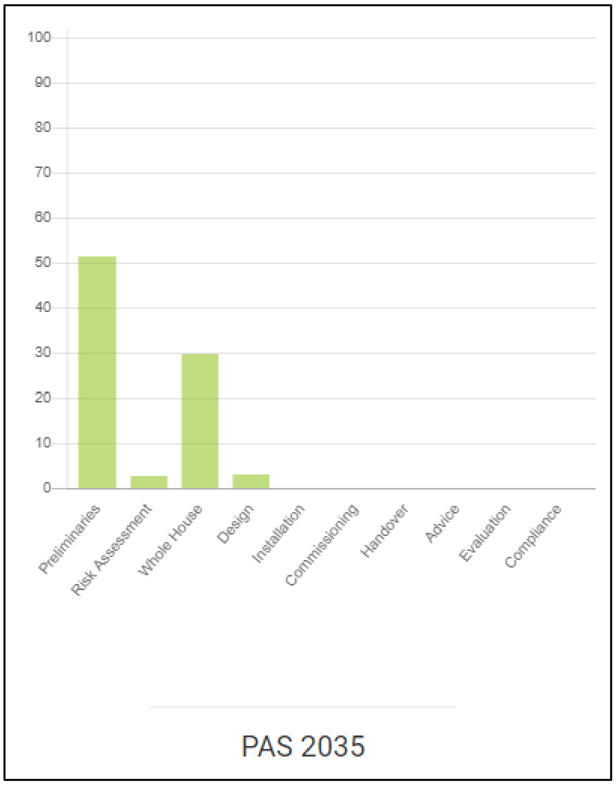
5.4 Project Overview

The project overview screen displays key information about the project, including works, risk path, PAS 2035 appointments, measures, TrustMark summary, information requests and specifications.

Data collected for each address will be represented on separate tiles within the overview for the entire project to show a summary of progress.

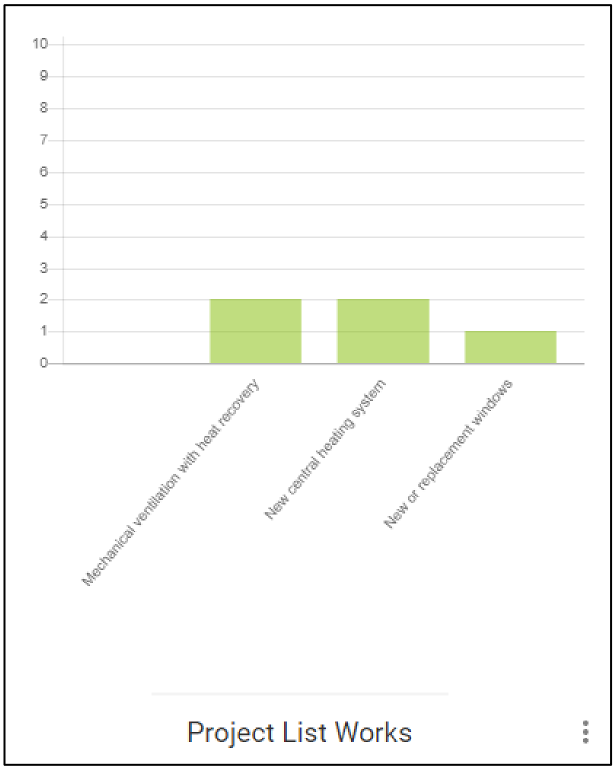
5.4.1 PAS 2035

The PAS 2035 tile represents progress for the entire project in bar chart format. As you work through the stages and tasks, marking activities as complete, this tile is updated automatically to give you an overview of how the project is developing.

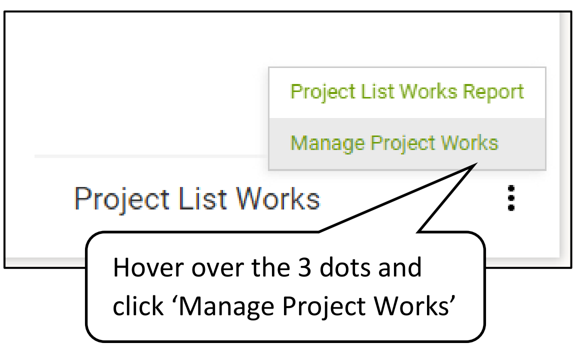


5.4.2 Project List Works

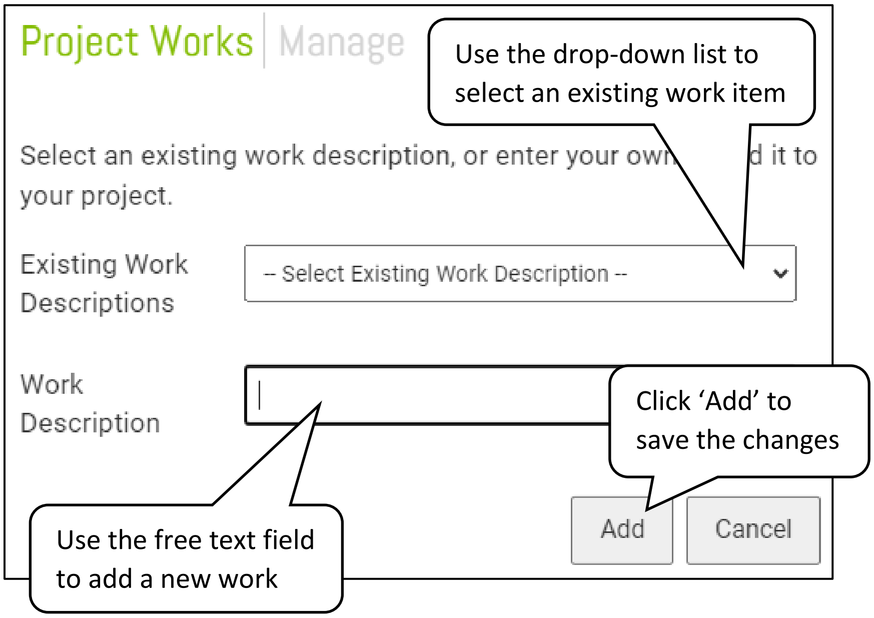
The project list works tile enables you to set the work types for the project which are assigned to individual addresses and gives you an overview of how many addresses require each work type.



1. To add new work descriptions, hover over the 3 dots in the bottom right of the tile and click 'Manage Project Works'



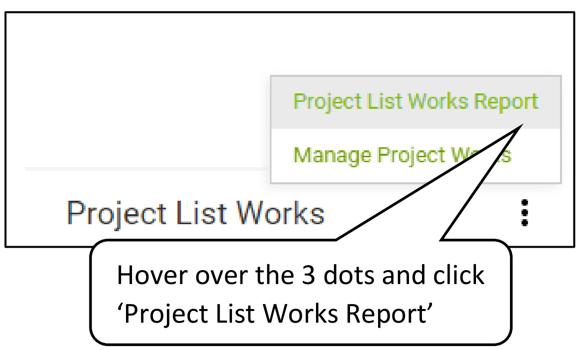
2. Either select an existing work from the drop-down list or type in a new work description in the box below.
3. Click 'Add' to update the project works.



NOTE Once saved, any new work descriptions added will appear in the existing work descriptions list the next time you use the manage project works tile.

To view the assigned work items, there is a works report that can also be accessed through this tile.

4. Hover over the 3 dots in the bottom right of the tile and click 'Project List Works Report'.



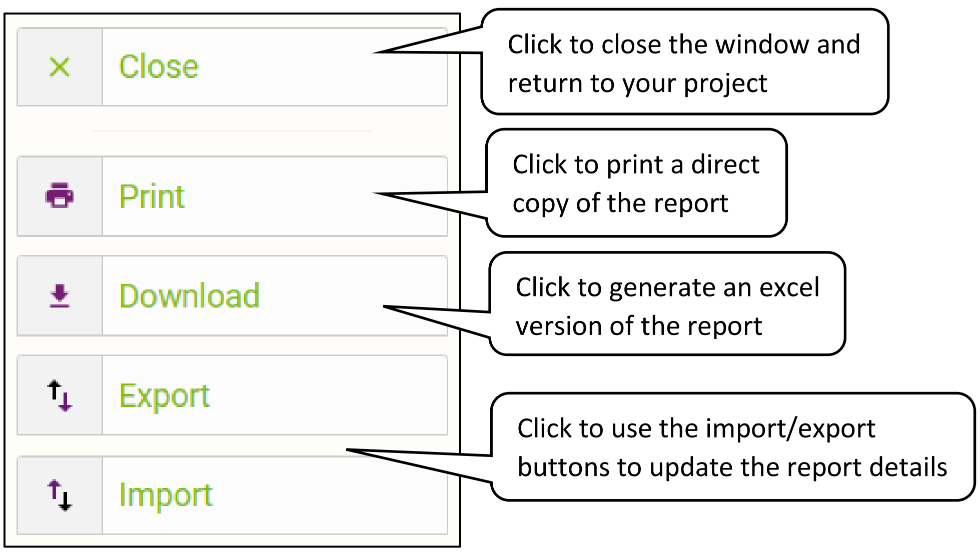
5. On the main screen you will see a table overview, each column relates back to the work descriptions added through the 'Manage Project Works' function and each row displays an address with any associated works noted accordingly. For any works which have been omitted for an address, they will be marked under the corresponding work description as 'No' with the reason assigned.

Project List Works | Report

UPRN	Address	New central heating system	New or replacement windows	Defective Rainwater goods	Mechanical ventilation with heat recovery
100BR029	29 Bolton Road, Swinton, Manchester, Greater Manchester, M27 8UX	No - No - Work Required	No - No - Work Required		No - No - Work Required
100BR030	30 Bolton Road, Swinton, Manchester, M27 8UX	Yes	No - Resident refused works		Yes
100BR031	31 Bolton Road, Swinton, Manchester, M27 8UX	Yes	Yes		Yes

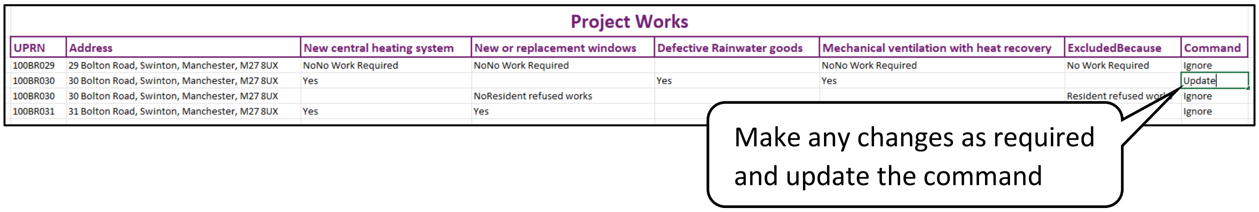
Please refer to section **5.5.5 Planned Works** on guidance of how to assign works to specific addresses.

To the left of the screen, you have additional options enabling you to export the data by printing directly from the software or downloading in spreadsheet format. Please see details below.



6. The last two buttons are used to update the data via import/export sheets. These can be used to update any of the omission details for either one or multiple addresses. Click on 'Export' to extract the data.
7. Open the spreadsheet and make any changes as required.
8. Update the command column using the following rules, ensuring any unchanged rows are populated with the command of 'Ignore'.

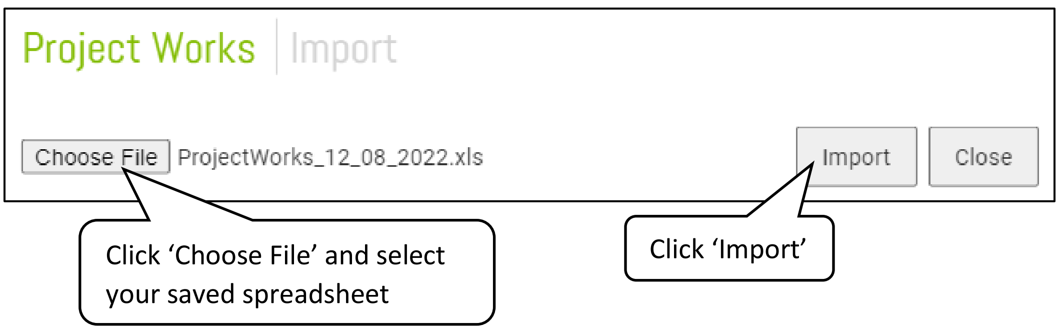
- Insert (to insert new data)
- Update (to amend existing data)
- Delete (to remove existing data)
- Ignore (to ignore existing data)



Project Works

UPRN	Address	New central heating system	New or replacement windows	Defective Rainwater goods	Mechanical ventilation with heat recovery	ExcludedBecause	Command
100BR029	29 Bolton Road, Swinton, Manchester, M27 8UX	NoNo Work Required	NoNo Work Required		NoNo Work Required	No Work Required	Ignore
100BR030	30 Bolton Road, Swinton, Manchester, M27 8UX	Yes		Yes	Yes		Update
100BR030	30 Bolton Road, Swinton, Manchester, M27 8UX		NoResident refused works			Resident refused wo[illegible]	Ignore
100BR031	31 Bolton Road, Swinton, Manchester, M27 8UX	Yes	Yes				Ignore

9. Save your spreadsheet and return to Homelife. This time click on ‘Import’ and choose the relevant file. Click ‘Import’ to apply the changes.



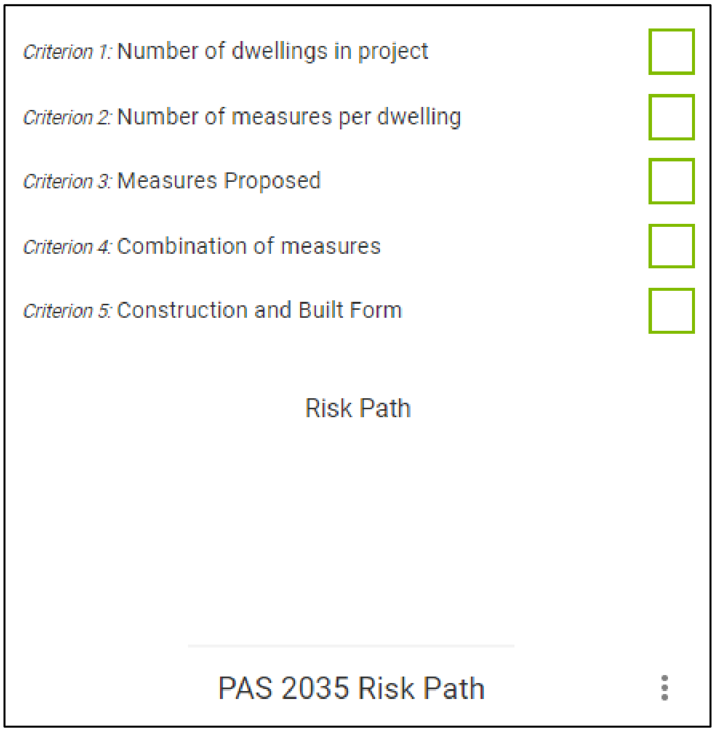
Any updates will now be reflected in the omissions report and omit address tile for the relevant addresses.

NOTE In this spreadsheet, each row stores data for one work item, so for example if your address has 3 works assigned to it these will be displayed across 3 separate rows. Please bear this in mind when inserting new works – the address and work items will need adding as a new row rather than adding to an existing row in the spreadsheet.

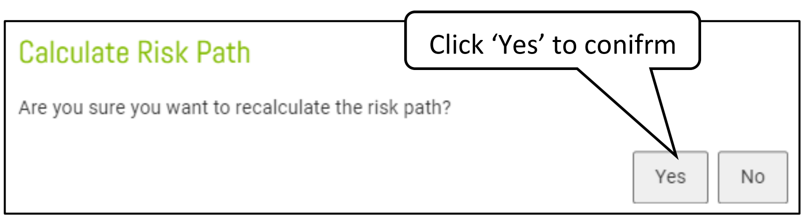
5.4.3 PAS 2035 Risk Path

The risk path is calculated on a number of criteria from the information supplied during the set-up of the project. The five criteria are listed below.

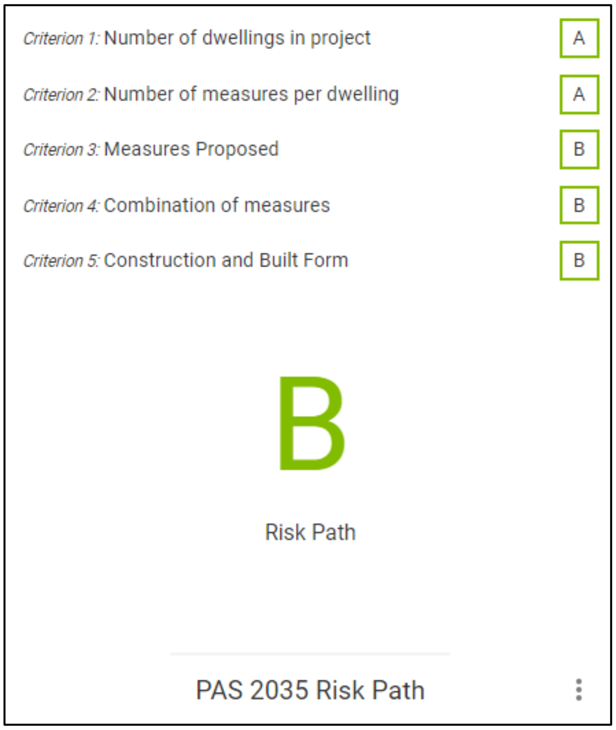
- Number of dwellings in project
- Number of measures per dwelling
- Measures proposed
- Combination of measures
- Construction and built form



1. To calculate the risk path, hover over the 3 dots in the bottom right of the tile and click ‘Calculate Risk Path’.
2. Click ‘Yes’ to confirm.



If sufficient information has been collected against each criterion, the path level will be assigned against the row. The final risk level is determined from the combination of all criteria above.



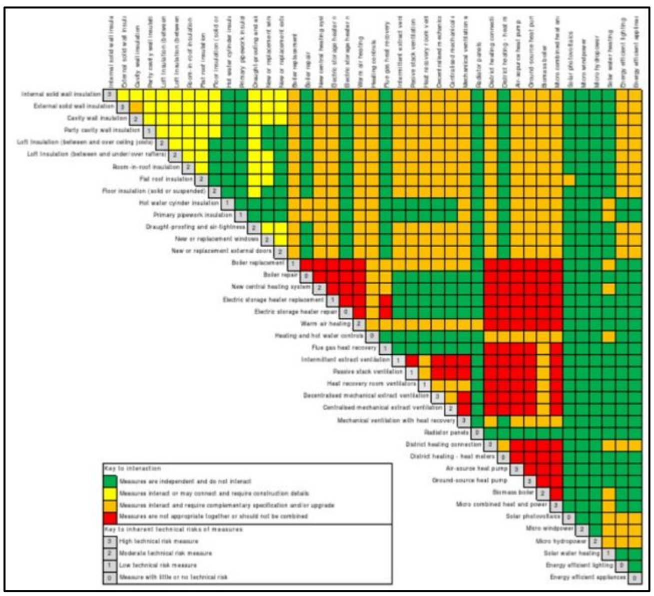
5.4.4 PAS 2035 Appointments

The PAS 2035 appointments tile provides an overview of who each PAS role has been assigned to. Each role is listed, along with the details of who is responsible for the role. If a role has not yet been assigned, the tile will show 'None' in the corresponding row until updated.

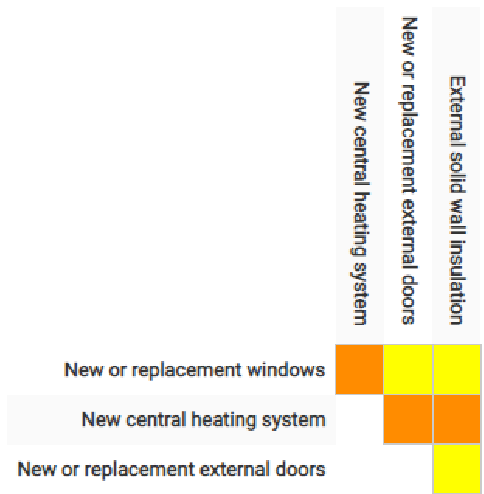
Please refer to section **5.7.1 Appoint Person** for guidance on how to update appointments for the project.

5.4.5 Measures Interaction Matrix

The measures interaction matrix is a guide to show the impact of using combined measures within a retrofit project. This is represented in a traffic light system of green measures (independent of other works), yellow/amber measures (may interact or connect with other works and as such may require further specifications or input), red measures (conflicting works that should not be combined). This influences a technical risk level of the measures being undertaken.



On transfer of the addresses from Housing through to Homelife, the proposed measures will be carried over with the PAS 2035 information. This data informs the 'Measures Interaction Matrix' tile to provide an output as shown in the example shown below.

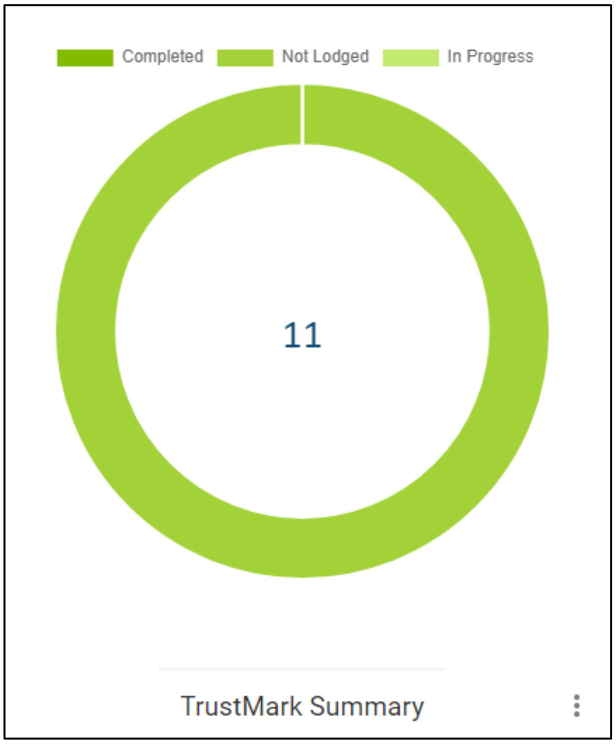


Measures Interaction Matrix

5.4.6 TrustMark Summary

Once the project has been completed, all the relevant information and documentation needs to be submitted to TrustMark for compliance purposes.

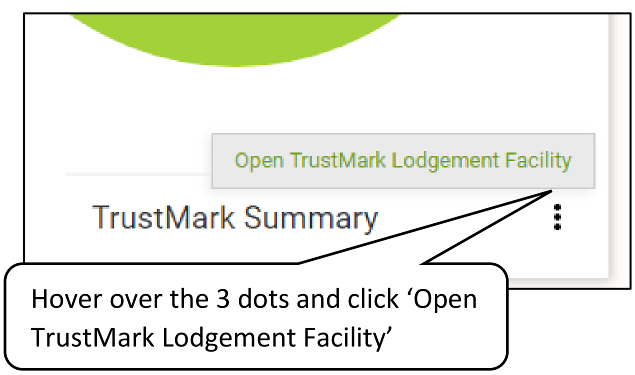
The TrustMark summary tile shows an overview of progress on lodgements made throughout the project. The total number of addresses in the project is displayed in the middle of the chart and above the key outlines the stages, 'Completed', 'Not Lodged' and 'In Progress'. The chart will change once any updates are made to reflect the stage colours in the key provided.



The tile is interactive so you can click on any of the stages at the top to remove the data for the linked addresses from the chart (i.e., if you click on 'Completed' the chart will update and reflect only addresses which are 'Not Lodged' or 'In Progress').

You can update the TrustMark information via the project and address overview by using the lodgement facility.

1. Hover over the 3 dots within the tile and click 'Open TrustMark Lodgement Facility'



2. A new window will open to show an overview with the project addresses displayed on the left and corresponding data on the main screen. Select a property to view the details.

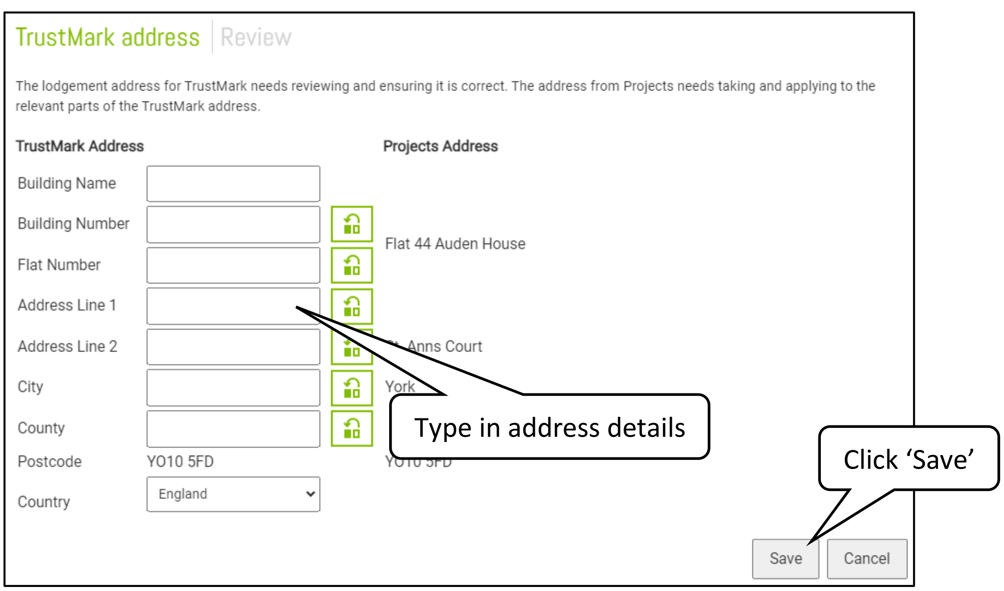
You will now see a number of new tiles as outlined below.

Trustmark Address

Prior to lodging, you need to ensure the address details are correct.

3. Hover over the 3 dots within the TrustMark address tile and click 'Review and Update'.

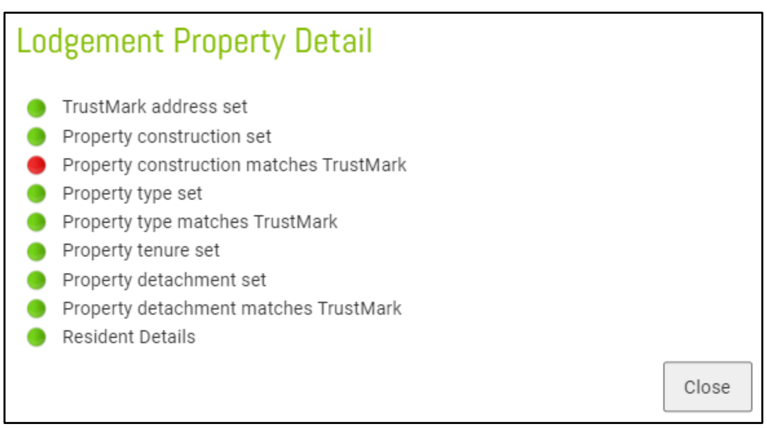
4. Complete the form by typing in the address details or use the copy buttons to autofill the information. Click 'Save' to update the tile.



Preflight Checks

The preflight checks tile provides a breakdown of the required information prior to lodgement and gives a traffic light progress status for each so you can check everything has been uploaded before submitting.

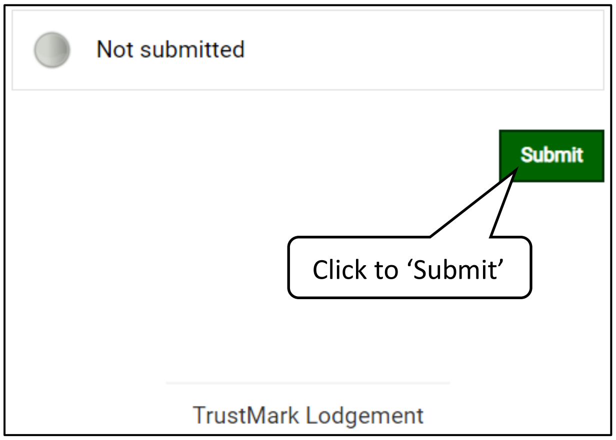
Click into any of the headings to open the list of required actions/documents. Again the traffic light status is used for each item and shows in green once complete. You can return to your project at any point to update the missing information prior to lodging.



Trustmark Lodgement

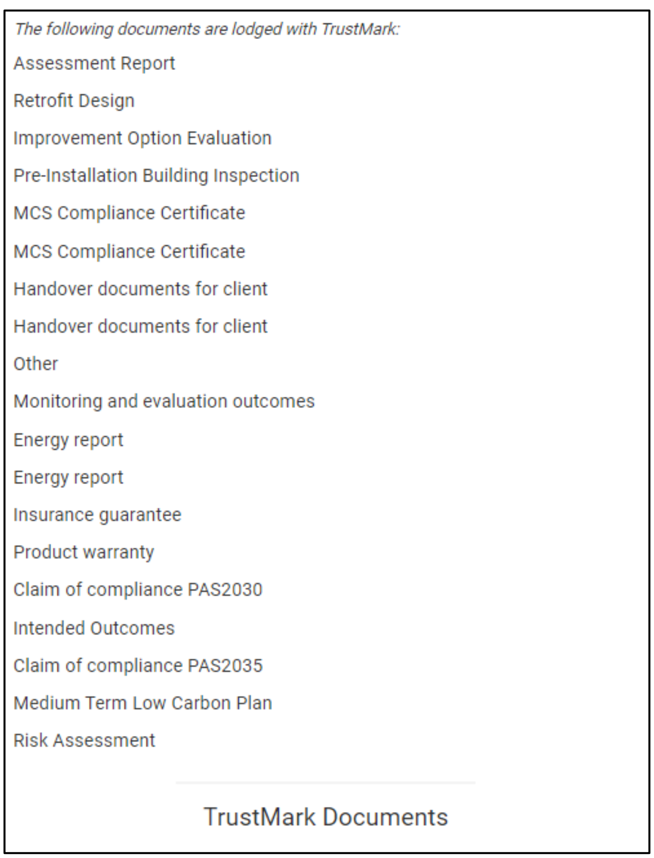
Until the address has been finalised and submitted, the TrustMark lodgement tile will show as below.

1. To submit a property, locate the lodgement tile and click ‘Submit’.

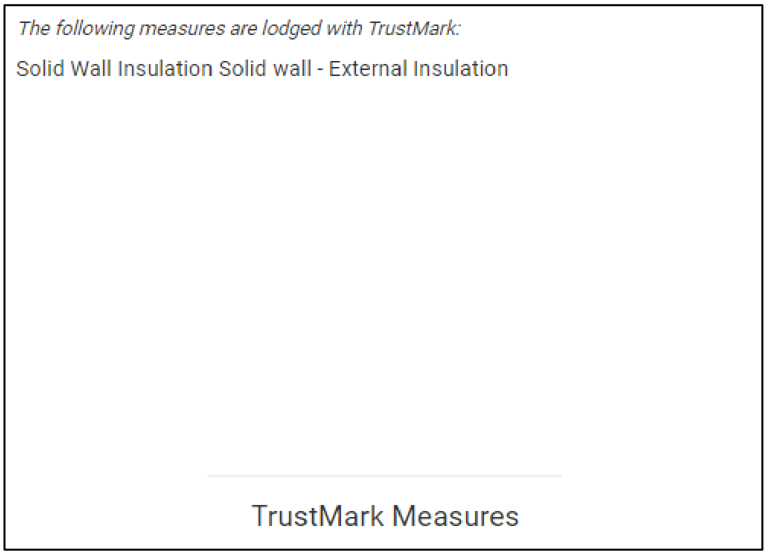


This will send over all the stored information from the project to the TrustMark data warehouse and the remaining tiles within the lodgement facility will be populated as below.

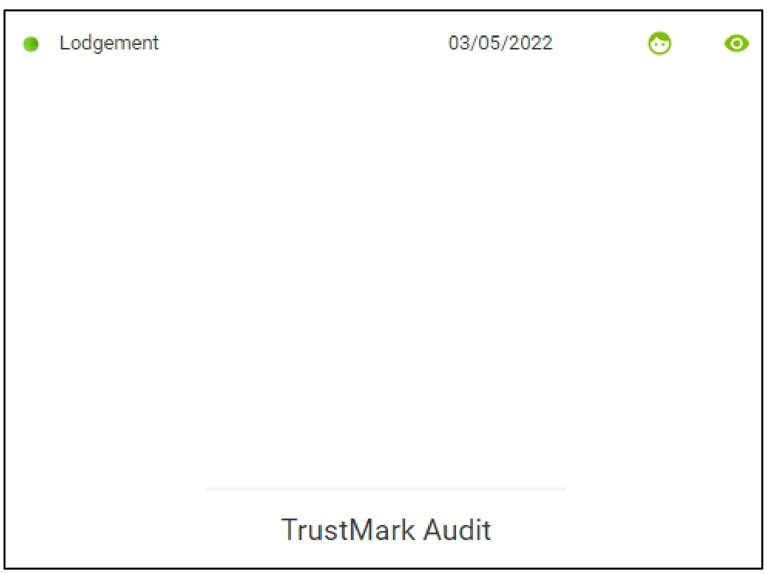
- All applicable documents uploaded against the property will be displayed within the ‘TrustMark Documents’ tile.



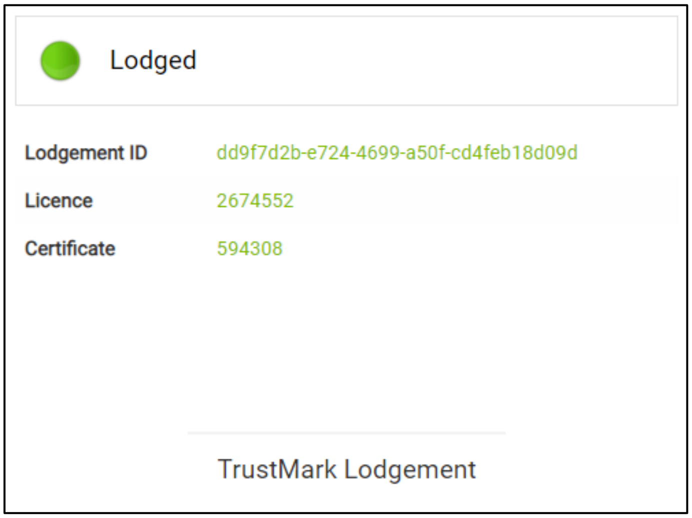
- The specified measure will be listed within the 'TrustMark Measures' tile.



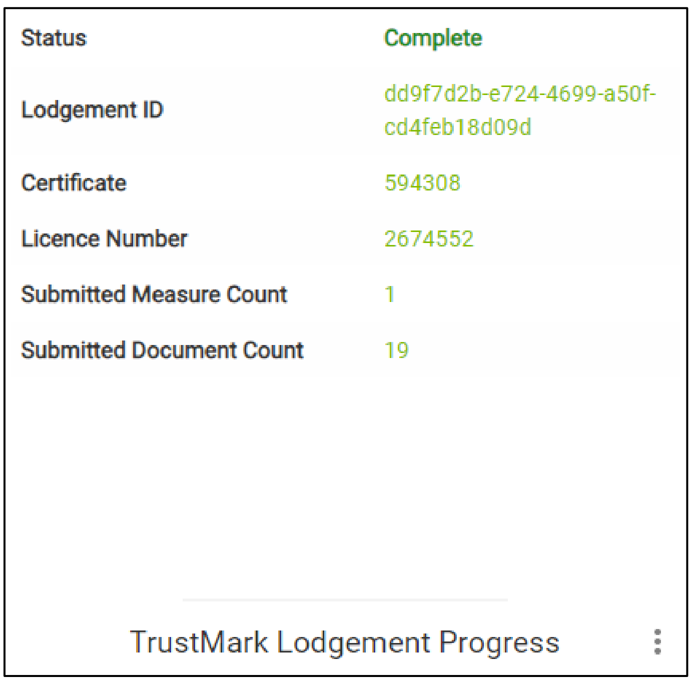
- Confirmation of the lodgement and date of submission will be displayed within the 'TrustMark Audit' tile. This area also has two interactive elements, hovering over the face icon will display the name of the user who processed the submission and clicking on the eye icon will open an 'Audit Details' window.



Once lodged, the 'TrustMark Lodgement' tile will be updated to show the new lodged status, details of the lodgement ID, license number and certificate number will also be displayed here.



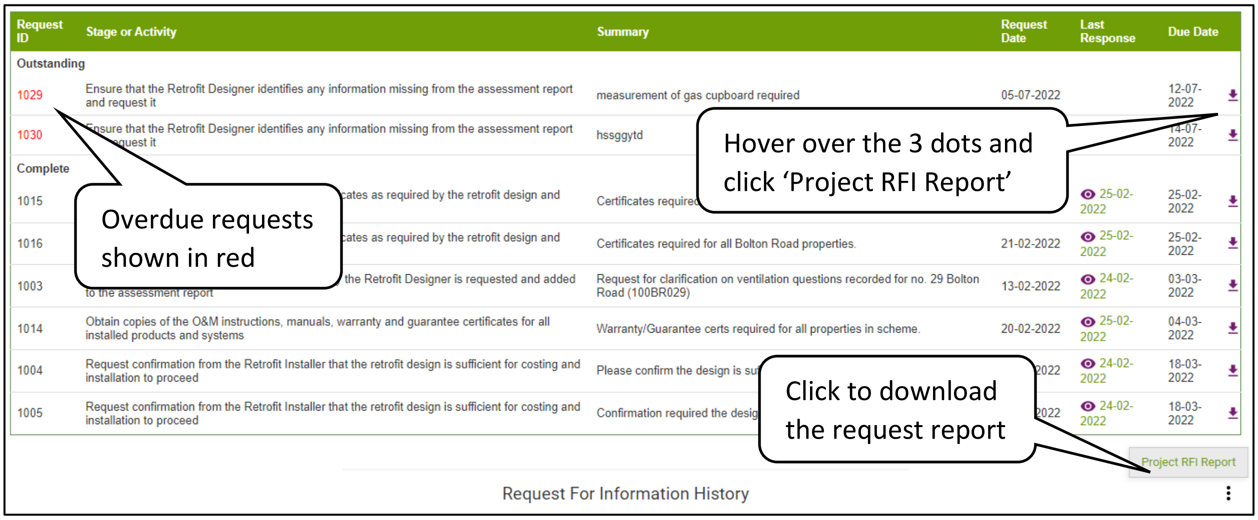
When you return to your address overview in the projects screen, the 'TrustMark Lodgement Progress' tile will also now be updated. This tile displays the status along with lodgement and certificate IDs, license number and the number of submitted measure and documents for the selected property.



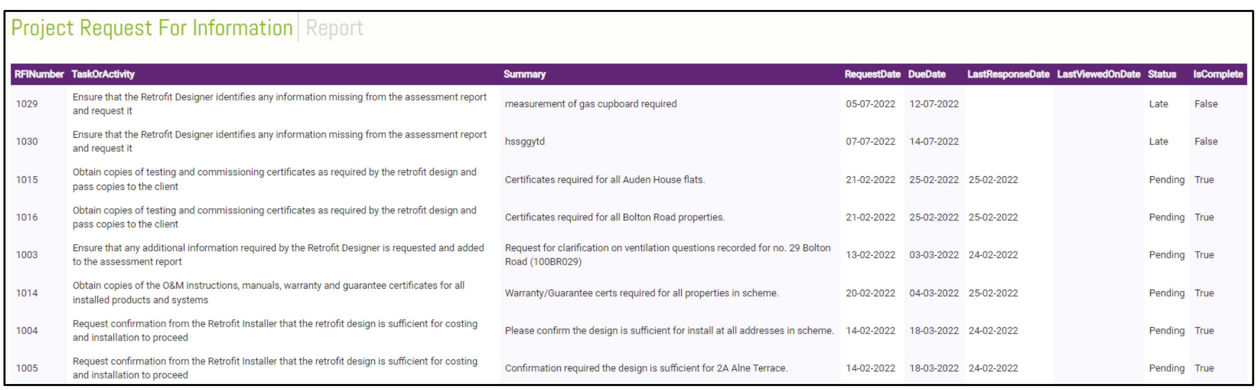
5.4.7 Request for Information History

The request for information history tile provides a record of all requests for information made throughout the project. Each request is created with a unique ID and is linked with a specific stage/activity. The overview provides a summary of the request details, as well as the request, last response and due dates so the responses and completion times can be tracked. As in the example below, if any of the requests have not been completed by the due date, the request ID will be highlighted in red to reflect this.

1. To download a copy of the report, click the download icon to the right of the request.
2. To open the request for information report, hover over the 3 dots at the bottom of the tile and click 'Project RFI Report'.



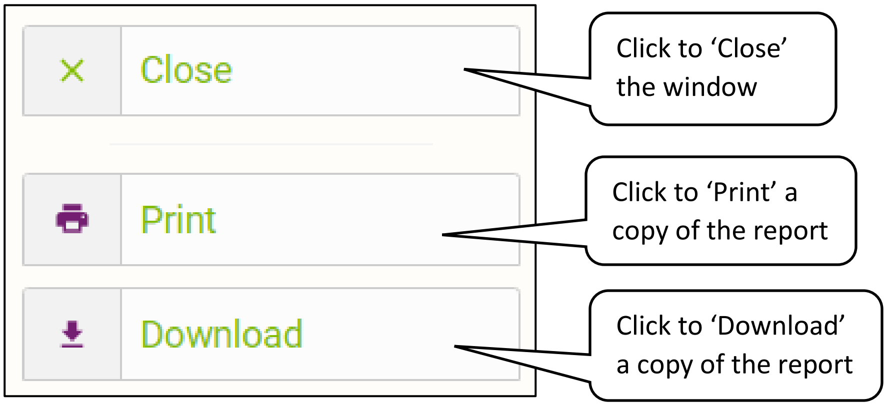
The report screen will open in a new window and from here you can view all the details in one area. You also have the facility to either print directly from the web page or download all requests in excel format.



Project Request For Information | Report

RFINumber	TaskOrActivity	Summary	RequestDate	DueDate	LastResponseDate	LastViewedOnDate	Status	IsComplete
1029	Ensure that the Retrofit Designer identifies any information missing from the assessment report and request it	measurement of gas cupboard required	05-07-2022	12-07-2022			Late	False
1030	Ensure that the Retrofit Designer identifies any information missing from the assessment report and request it	hssggytd	07-07-2022	14-07-2022			Late	False
1015	Obtain copies of testing and commissioning certificates as required by the retrofit design and pass copies to the client	Certificates required for all Auden House flats.	21-02-2022	25-02-2022	25-02-2022		Pending	True
1016	Obtain copies of testing and commissioning certificates as required by the retrofit design and pass copies to the client	Certificates required for all Bolton Road properties.	21-02-2022	25-02-2022	25-02-2022		Pending	True
1003	Ensure that any additional information required by the Retrofit Designer is requested and added to the assessment report	Request for clarification on ventilation questions recorded for no. 29 Bolton Road (100BR029)	13-02-2022	03-03-2022	24-02-2022		Pending	True
1014	Obtain copies of the O&M instructions, manuals, warranty and guarantee certificates for all installed products and systems	Warranty/Guarantee certs required for all properties in scheme.	20-02-2022	04-03-2022	25-02-2022		Pending	True
1004	Request confirmation from the Retrofit Installer that the retrofit design is sufficient for costing and installation to proceed	Please confirm the design is sufficient for install at all addresses in scheme.	14-02-2022	18-03-2022	24-02-2022		Pending	True
1005	Request confirmation from the Retrofit Installer that the retrofit design is sufficient for costing and installation to proceed	Confirmation required the design is sufficient for 2A Alne Terrace.	14-02-2022	18-03-2022	24-02-2022		Pending	True

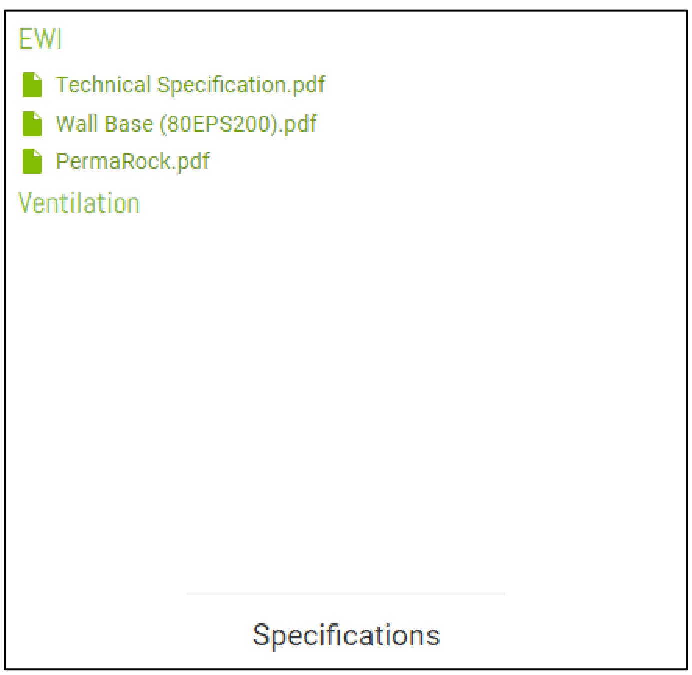
3. Use the buttons to the left of the screen to either 'Close' and return to your project overview, 'Print' a copy of the report or 'Download' and generate an excel version of the report to include all listed requests.



Please refer to section **5.7.6 Request for Information History** for guidance on how to add a new or update existing requests, create responses and mark items as complete.

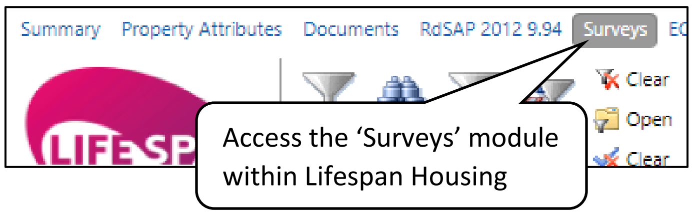
5.4.8 Specifications

The specifications tile is present in both the project and addresses overview and shows a record of all specifications provided for the project. Until any information has been provided you will see a message in the tile stating, 'No specifications have been made available for this project'.

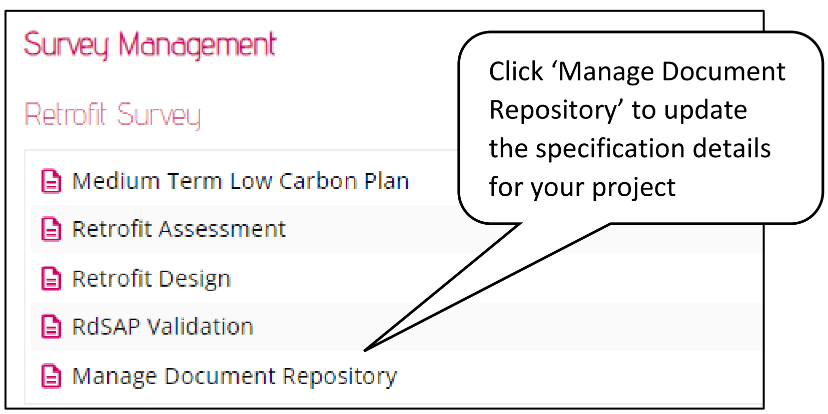


The specification documents must initially be supplied within Lifespan Housing before the information is displayed within the tile.

1. Login to Lifespan Housing and navigate to the ‘Surveys’ module.



2. Navigate to the ‘Survey Management’ section and click on ‘Manage Document Repository’.

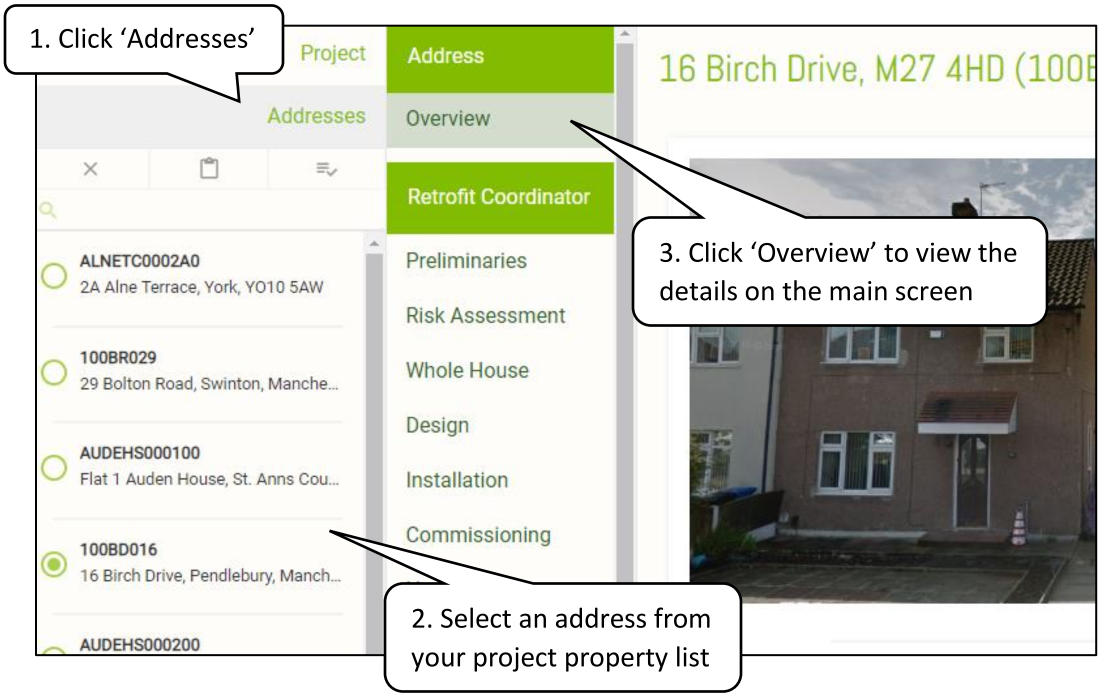


3. Upload the documentation as required. Returning to Homelife, you will now be able to access the information via the specifications tile.

5.5 Addresses Overview

Along with the project overview there is also an overview for each address, so you can see at a glance the information relating to the documentation, planned works, tenant details, specifications, lodgement data and any accompanying notes for the specified property. The information is displayed within tiles, some providing a view of the data and others working like objects allowing you to add and update the address.

To access the address overview, click ‘Addresses’ and select the property from the list on the left. Then click on ‘Overview’ on the middle section on the screen to view the information.



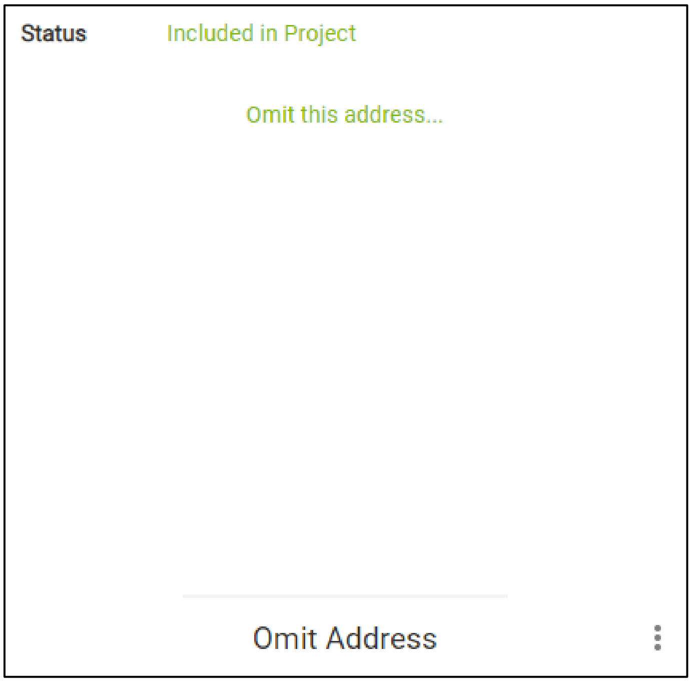
5.5.1 Main Photograph

The main photograph tile is linked with Lifespan Housing, the image displayed here is the 'Reference Photograph' assigned within Housing (generally the front elevation of a property).

NOTE If no image has been marked as the reference photo in Lifespan Housing, this tile will remain blank.

5.5.2 Omit Address

The omit address tile is used to remove an address from the project.

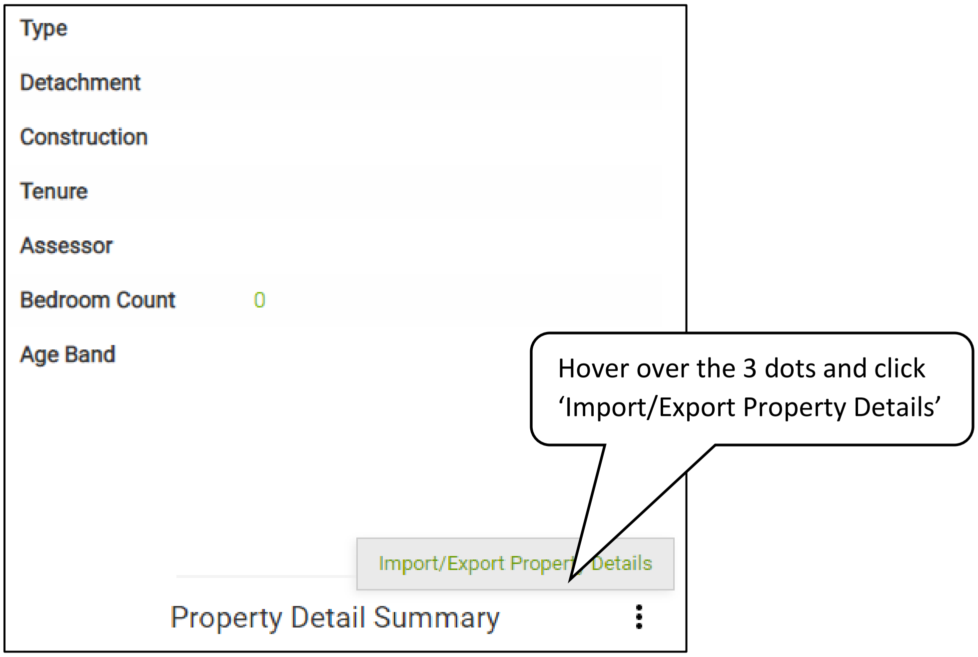


Please refer to section **5.2 Omitting Addresses** for guidance on how to omit an address.

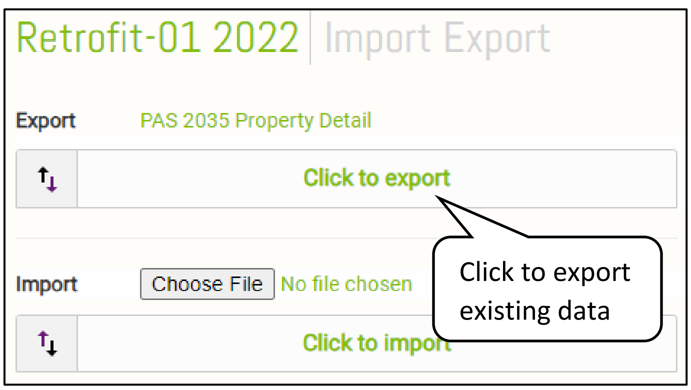
5.5.3 Property Detail Summary

The property detail summary tile provides background information for the selected address, such as property type, construction, tenure, number of bedrooms etc. This information can be sent across to Homelife from Lifespan Housing once the retrofit assessment has been completed, or you can populate this data via the import/export function within the tile.

1. Hover over the 3 dots and click ‘Import/Export Property Details’.



2. To generate an excel output of the existing data 'Click to export'.



3. Open the spreadsheet to

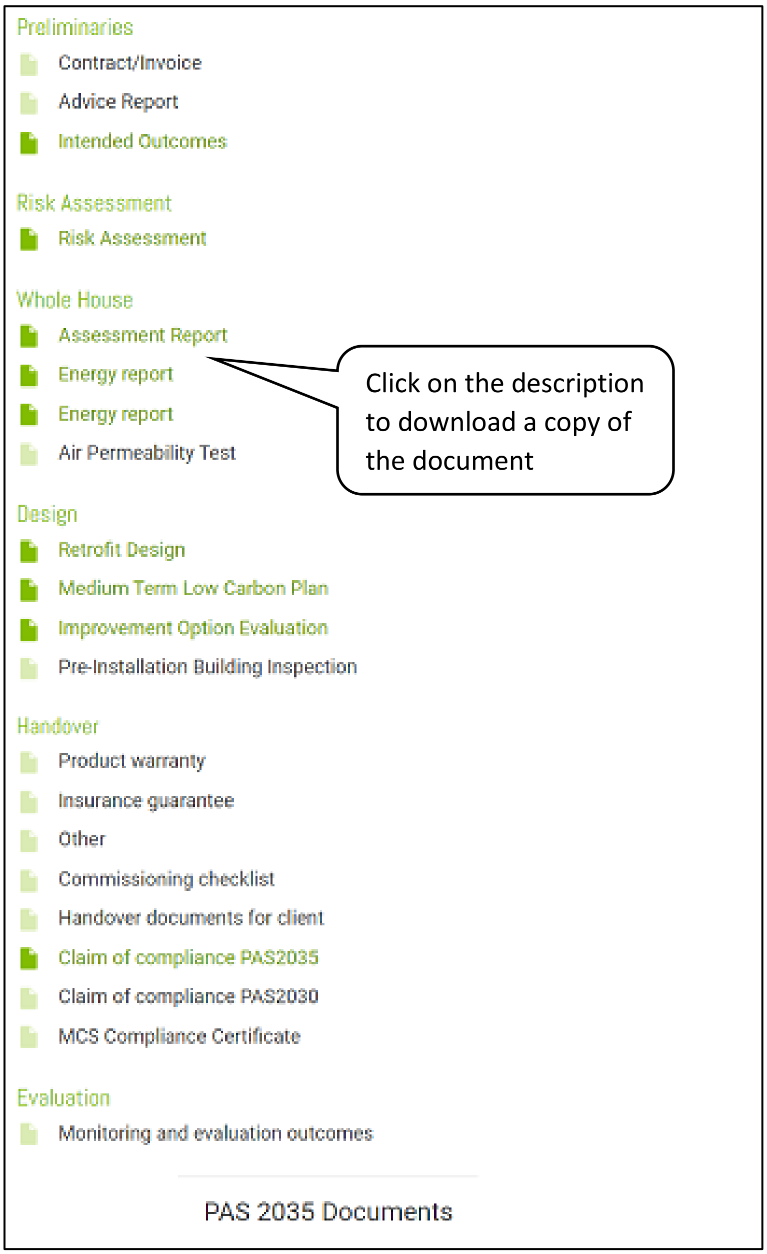
5.5.2 Measures Interaction Matrix

Please refer to section **5.4.5 Measures Interaction Matrix** for guidance on this tile. The figure shown is a representation of information transferred over from Lifespan Housing, so there are no actions required in Homelife for either the project in general or specific addresses. The data is for reference to the combination of proposed measures.

5.5.4 PAS 2035 Documents

The PAS 2035 documents tile gives an overview of the documents present for the selected address and allows you to download a copy of each where available. You can see which documents have been uploaded by the format of the description, which will be faded until a file has been added.

When you hover over a description, a 'Click to download' icon will appear if the document exists and clicking on the text will download a copy of the file.



Please refer to sections **5.6.2 Adding attachments** and **5.6.3 PAS 2035 Documents** for guidance on how to add documentation for the project in general or to a specific address.

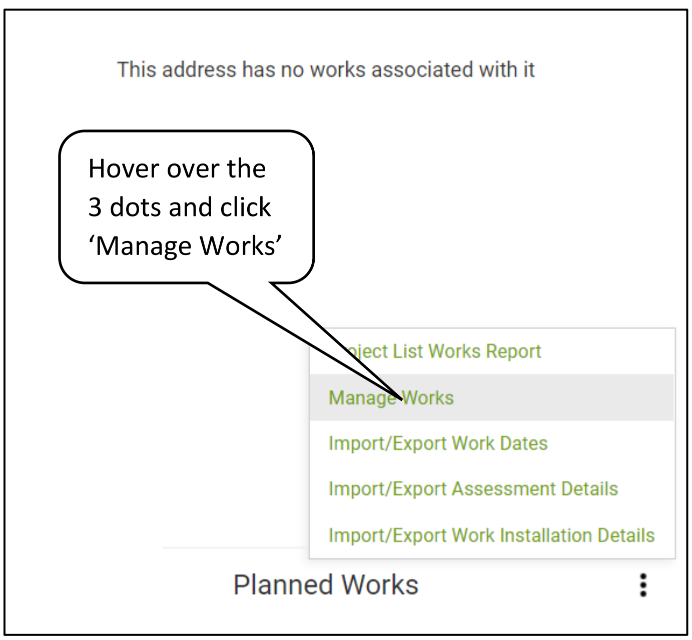
5.5.5 Planned Works

The planned works tile displays the works assigned to the chosen property. This is linked back to the project list works tile within the projects overview – work descriptions need to be added into the project before you can assign them to a property.

Please refer to section **5.4.2 Project List Works** for guidance on how to add work descriptions into the project.

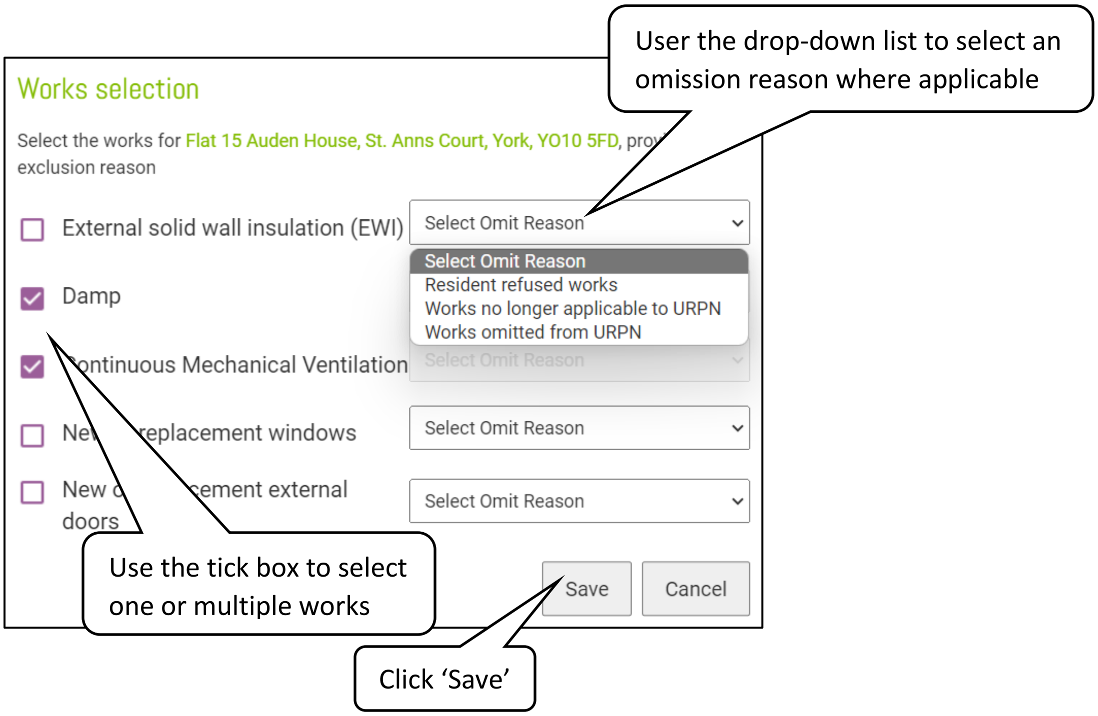
Until works have been assigned to an address, the planned works tile will be blank. If works have been assigned In Lifespan Housing prior to the addresses being sent to Homelife these can be included as part of the transfer, however, to assign works within Homelife, please follow the following steps.

1. To assign one or more works to an address, hover over the 3 dots within the tile and click 'Manage Works'.

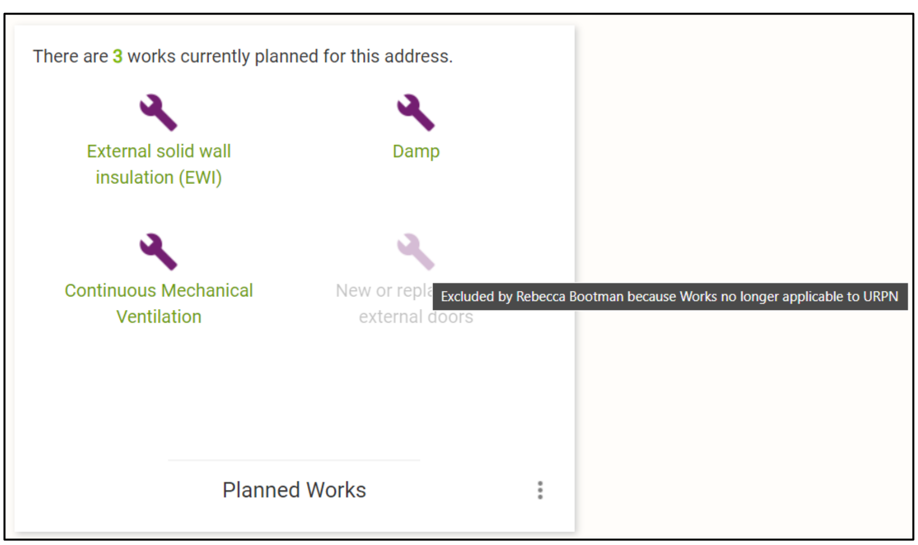


2. The works selection box will display all available works you can choose from to assign to the property. Use the tick boxes to the left of the description to select it and click save to update.

3. If you are returning to a property to remove a work item, there is an omit reason drop-down list which can be used to provide details of why the work is no longer required. Select a reason from the list and click save to apply the changes.



When you return to the address overview, the works will now display in the tile. Any omitted works will be faded out to show they were originally included but are no longer required. If you however over the omitted work icon, it will show details of the user who omitted the work and the reason selected.

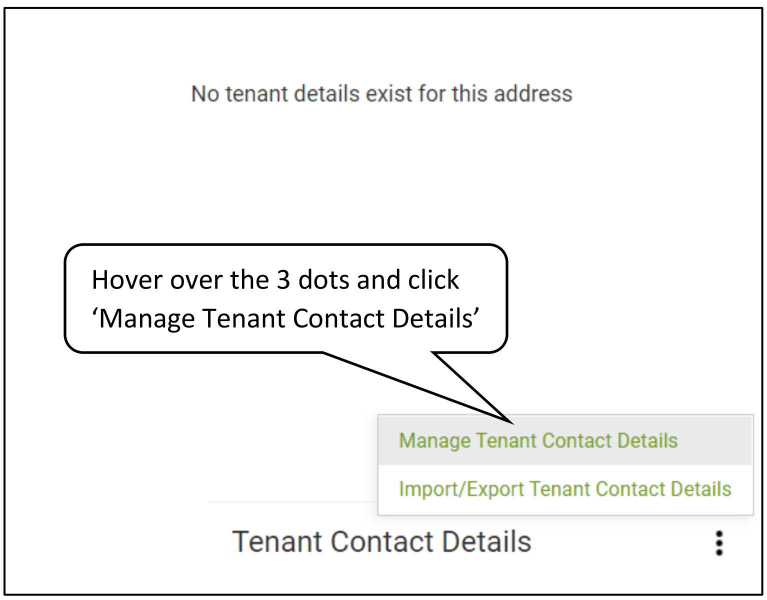


You can also view the project list works report through this tile which shows an overview of works assigned and omitted for all addresses in the project. Please refer to section **5.4.2 Project List Works** for guidance on how to view the information.

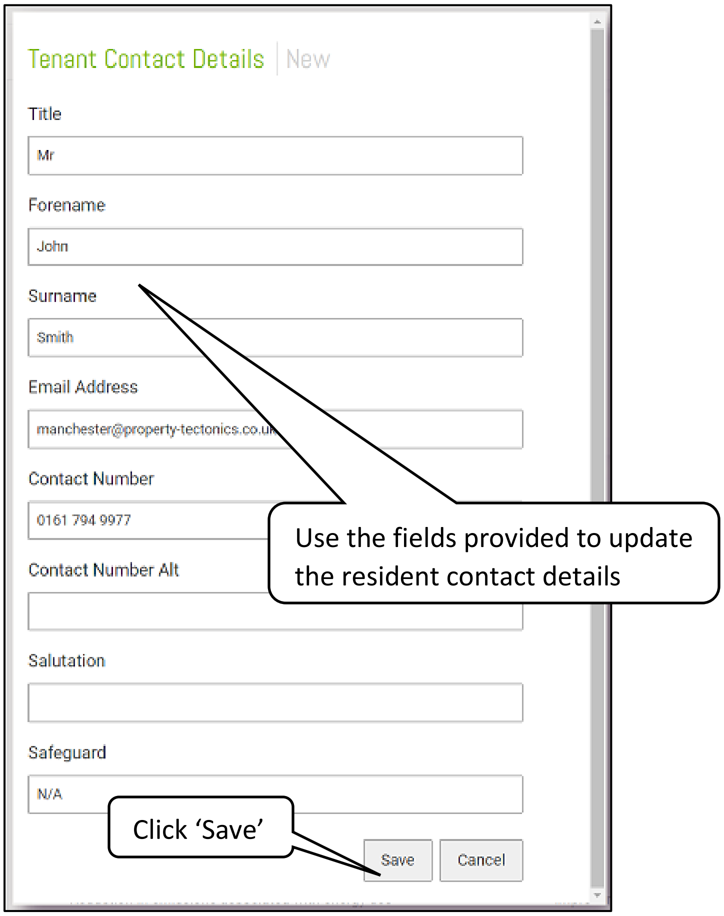
5.5.6 Tenant Contact Details

The tenant contact details tile enables you to store contact information for the resident at each address and can be updated via the user interface for an individual property or via the import/export function which allows you to input or amend details in bulk.

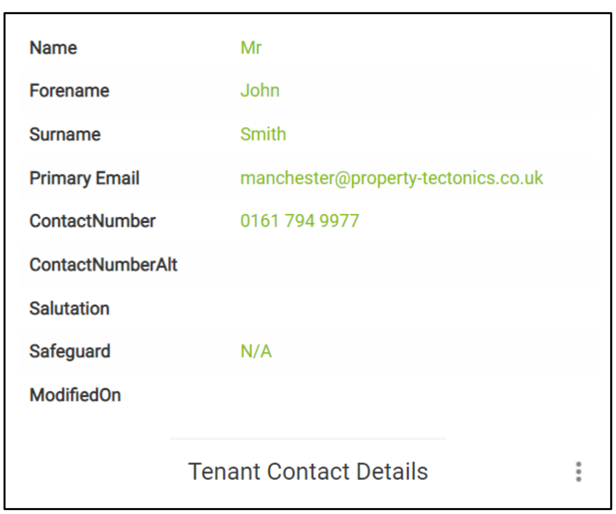
1. To enter or update details via the user interface, hover over the 3 dots within the tile and click 'Manage Tenant Contact Details'.



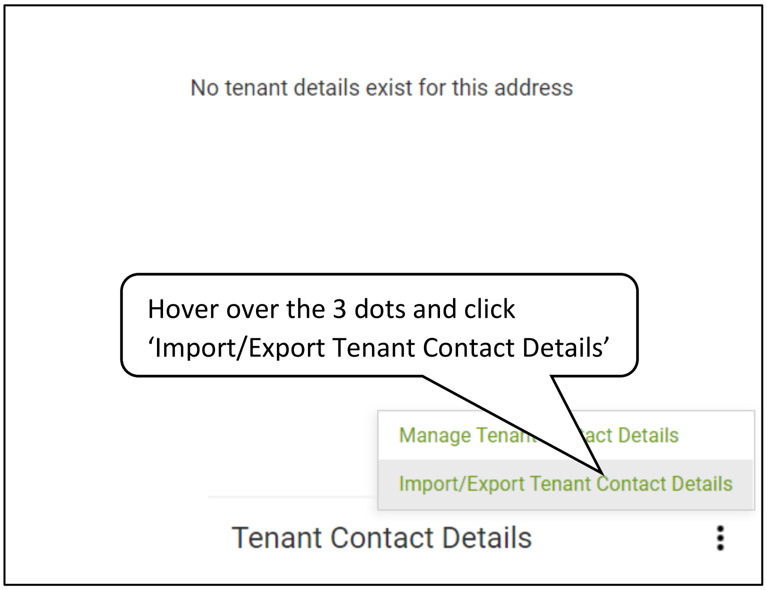
2. Update the contact details using the fields provided, click 'Save' once completed.



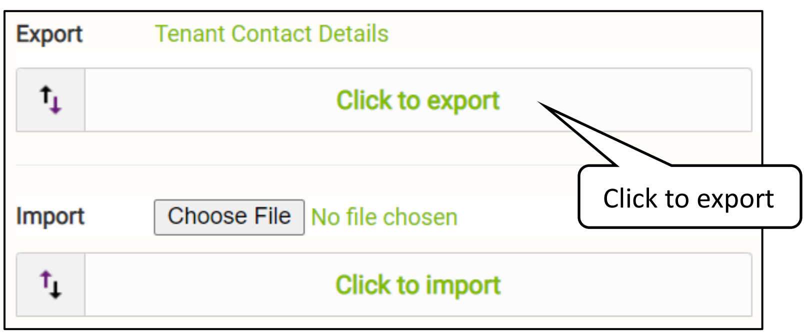
When you return to the address overview, the tile will now be updated with the details provided. You can go back into the 'Manage Tenant Contact Details' option to edit the details at any point as required.



3. To enter or update details via the import/export sheets, hover over the 3 dots within the tile and click ‘Import/Export Tenant Contact Details’.



a) The first step is to export the data that currently exists in the software, use the ‘Click to export’ button to generate a spreadsheet template download.



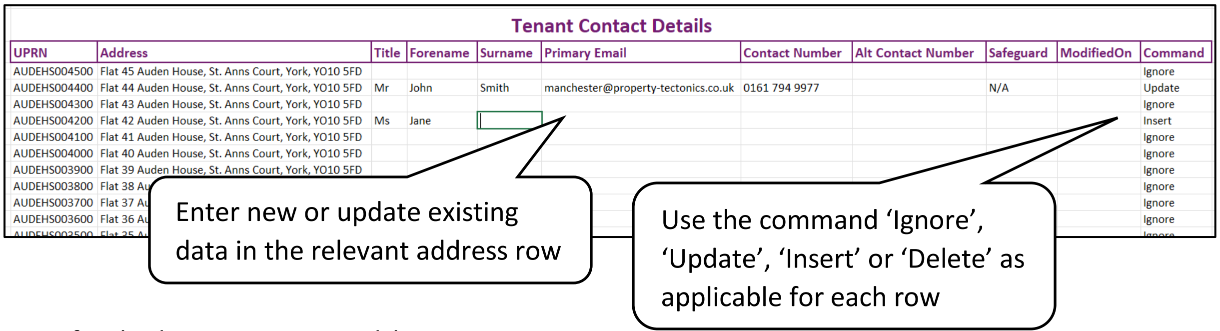
Once opened, you will see a full list of addresses from the project – each column relates back to one of the update fields in the ‘Manage Tenant Contact Details’ window. If any contact details have already been added against an address these will be displayed on the applicable row.

b) Populate the spreadsheet, filling in the contact details in the row next to each address as required. ‘Title’, ‘Forename’, ‘Surname’, ‘Primary Email’, ‘Contact Number’ and ‘Safeguard’ are all free text fields and the ‘ModifiedOn’ column can be left blank as this is automatically updated by the software once an import has been completed.

As usual there are four options to select from for the ‘Command’ column.

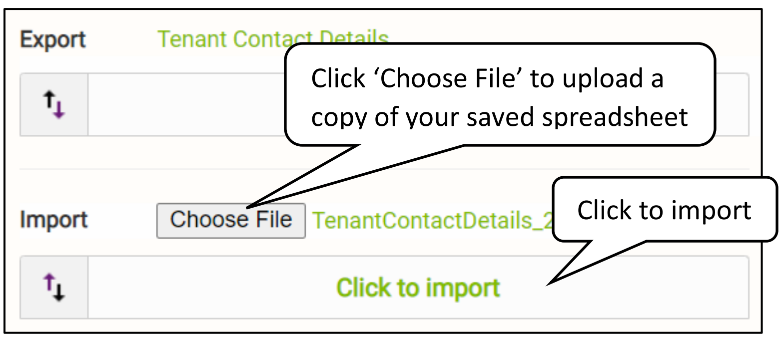
- Ignore – No changes will be made to the existing data.
- Update – The software will be updated to reflect the changes made to the applicable row.
- Insert – The new data will be uploaded against the specified address.

- Delete – The existing information will be removed from the address.



Once finished, save your spreadsheet.

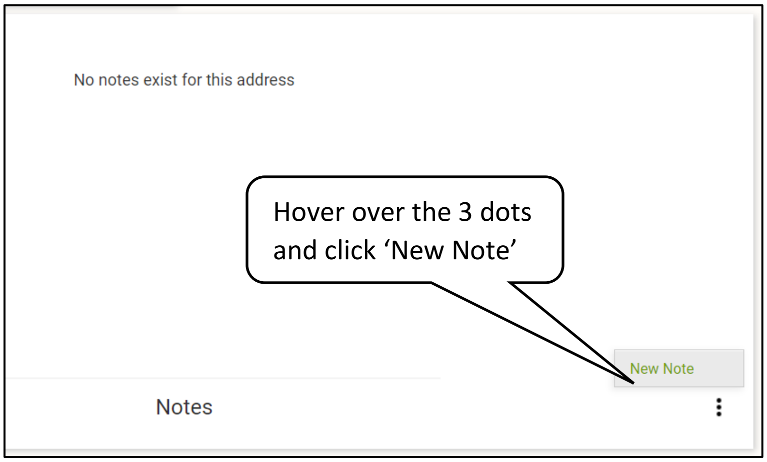
c) To import the data back into Homelife, return to your browser and click 'Choose File' to select your saved spreadsheet. Then use the 'Click to import' button to update your project with the details.



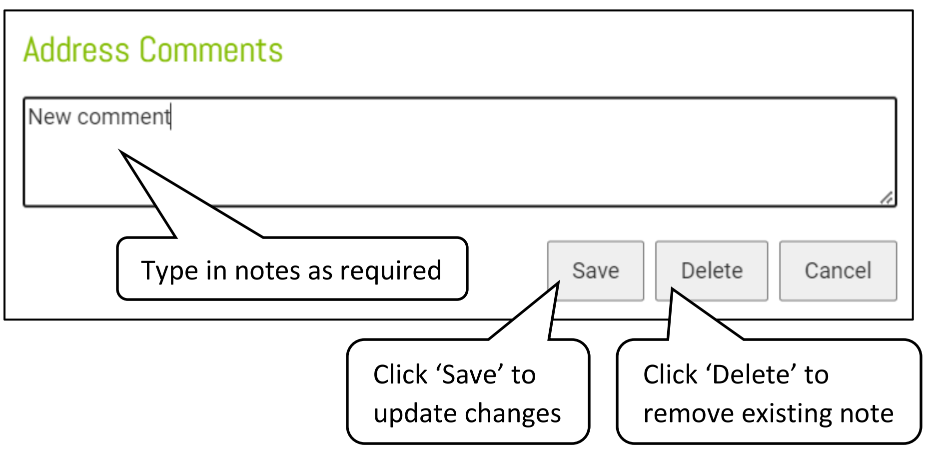
5.5.7 Notes

Notes can be added against an address at any stage of the project by using the 'Notes' tile.

1. Hover over the 3 dots within the tile and click 'New Note'.

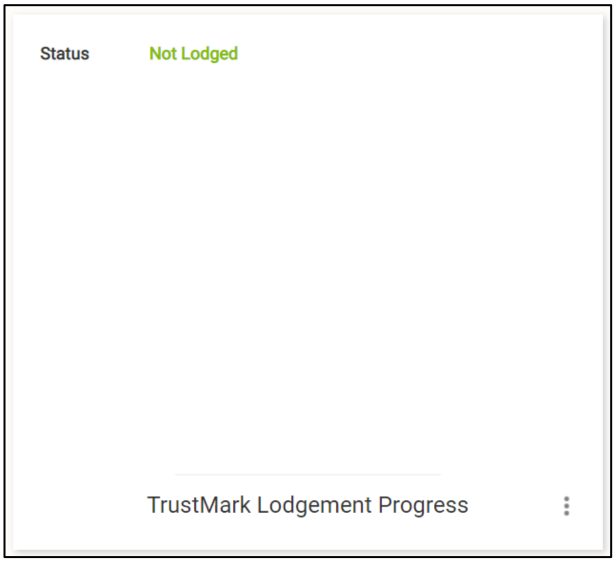


2. Use the text box to type in any notes as required.
3. Click 'Save' to apply the changes for the address.
4. Double click on any of the comments listed within the notes tile to re-open the comments box. You can then edit the note and click 'Save' to update or click 'Delete' to remove it.



5.5.8 TrustMark Lodgement Progress

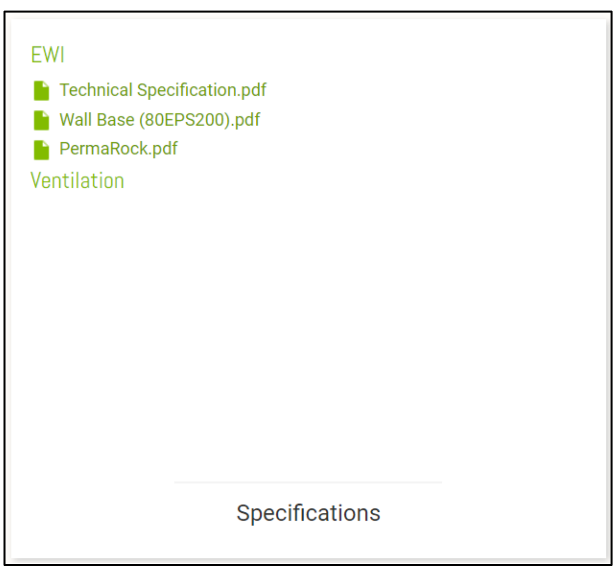
The TrustMark lodgement details can be accessed via the project or address overview screens. The tile within the address overview provides you with confirmation on whether or not the chosen property has been lodged, there is also the option of accessing the lodgement facility through this tile.



Once the full process has been completed, the status will be updated for each applicable property.

Please refer to section **5.4.6 TrustMark Summary** for guidance on how to use the TrustMark lodgement facility.

5.5.9 Specifications

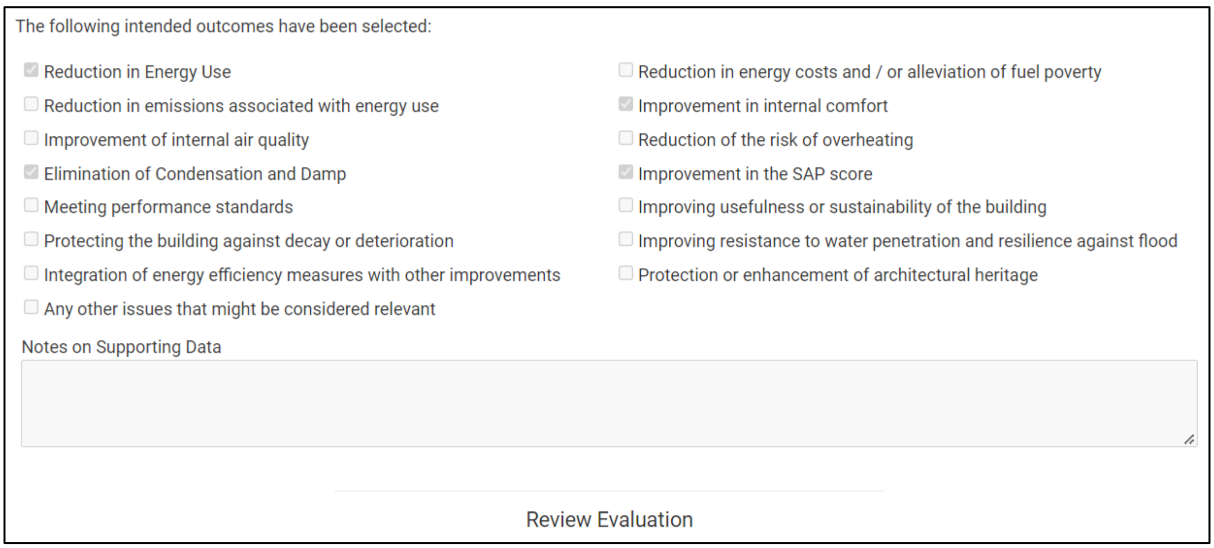


The specifications tile is present in both the project and addresses overview and shows a record of all specifications provided for the project.

Please refer to section **5.4.8 Specifications** for guidance on how to upload the required specifications for a project.

5.5.10 Review Evaluation

The review evaluation tile gives an overview of the intended outcomes for the individual address. All available outcomes for the project are listed and those selected for the property are ticked, any supporting notes are displayed below.



Please refer to section **5.7.2 Add Intended Outcomes** and **5.7.3 Review and Edit Intended Outcomes** for guidance on how to add new and edit existing intended outcomes for an address.

5.6 Project Stages

There are a number of stages to be completed throughout the project and these are allocated to each relevant PAS role. It is important to note that each user will need to be assigned to a specific PAS role in order to amend data within specific areas for the project. One user can however be assigned to multiple roles if applicable to the project. The roles are defined as below.

<u>Retrofit Coordinator</u>

The retrofit coordinator will have access to all areas of the project in order to oversee the running and progress of each stage of the project.

<u>Retrofit Designer</u>

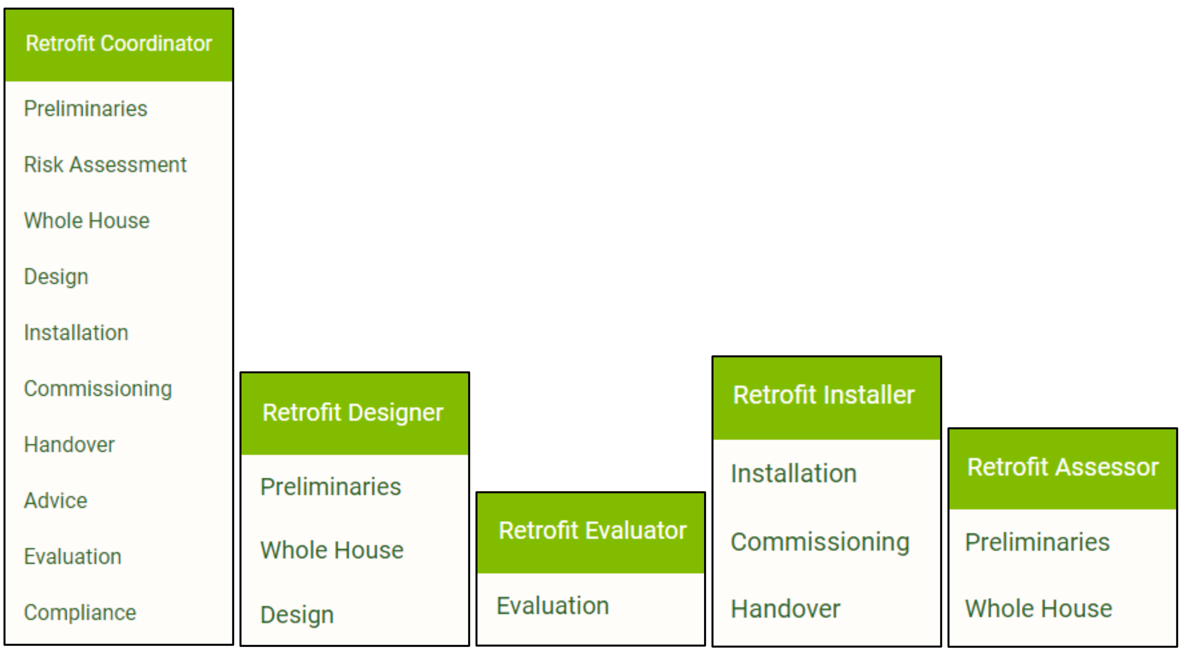
The retrofit designer has a much more limited access to the information being recorded, as they only need visibility of the data sufficient to complete the design.

Retrofit Evaluator

The retrofit evaluator only has sight of the evaluation stage of the project.

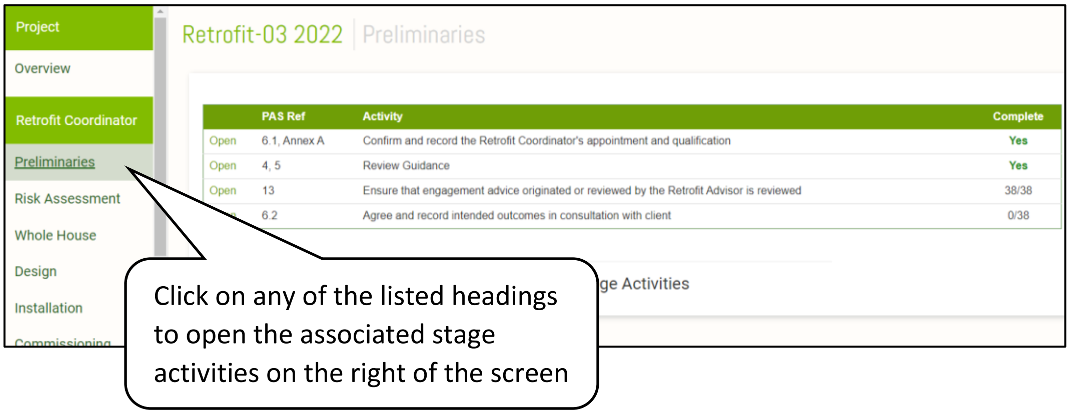
Retrofit Assessor

The retrofit assessor is given sufficient access to see the stages relevant to the initial set up and retrofit assessment.



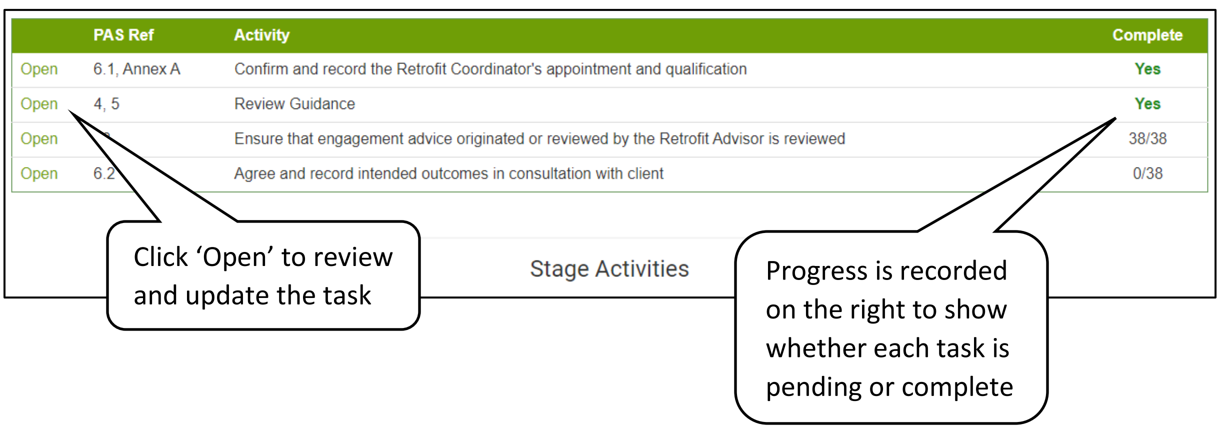
The software has been designed in accordance with PAS guidance and each stage follows the same reference code assigned within the standard to ensure each element is covered and progress logged accordingly.

You can access the activities for each stage from your ‘Project’ or ‘Addresses’ tab by selecting the relevant heading listed underneath your PAS role.



5.6.1 Stage Activities

The stage activities will be displayed on the right, this gives you an overview of the PAS Ref and description for each relevant task for the selected heading, click 'Open' on each corresponding row to review and update the task details. The 'Complete' column on the right displays an overview of progress so far, to show whether an activity is pending or complete.



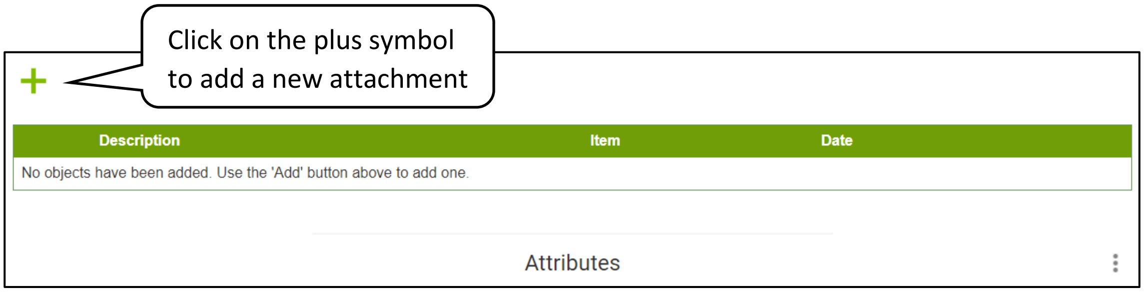
Clicking on 'Open' next to the chosen task will take you to its objects page where you can review and upload documentation along with updating any of the associated objects.

5.6.2 Adding attachments

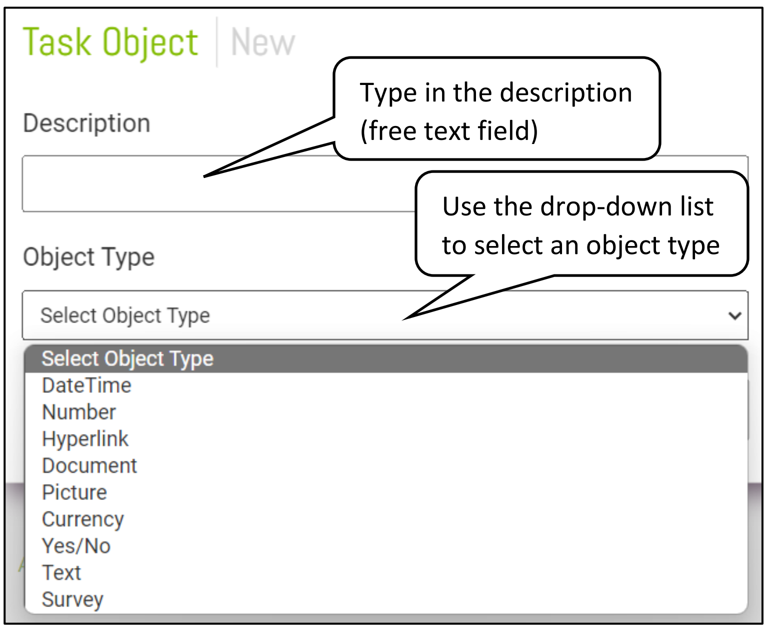
There is an option to add attachments throughout the project and within each of the listed stage activities.

1. Click 'Open' next to the activity to open the objects page.

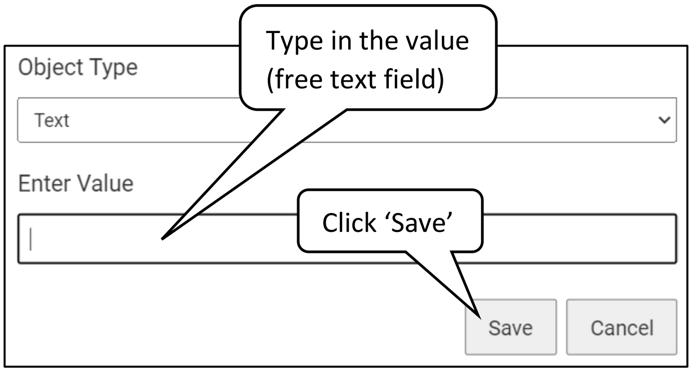
2. Locate the 'Attributes' tile. This tile will display all existing attachments for the project, not just items added in at a specific stage.



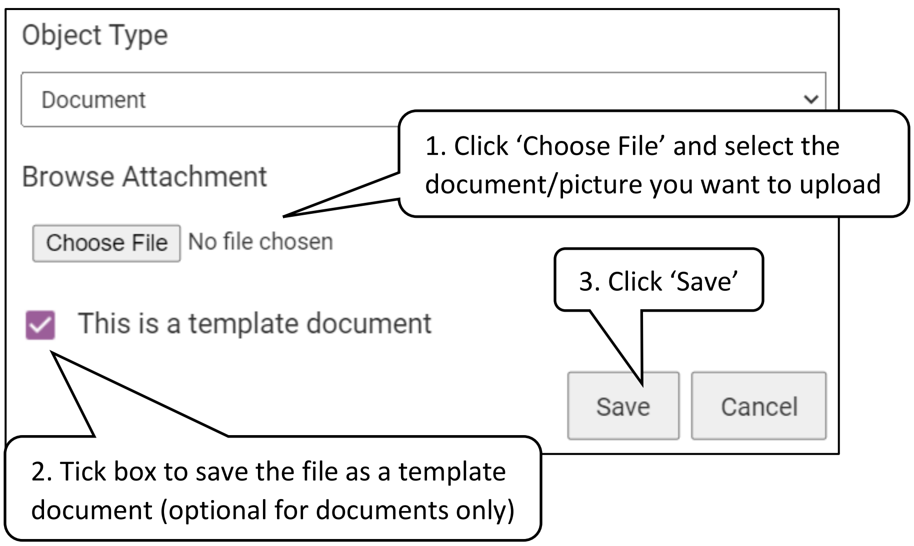
3. Type in a description and select an object type from the drop-down list. Dependent on the type selected you will get different options available to you in order to complete the attachment insert.



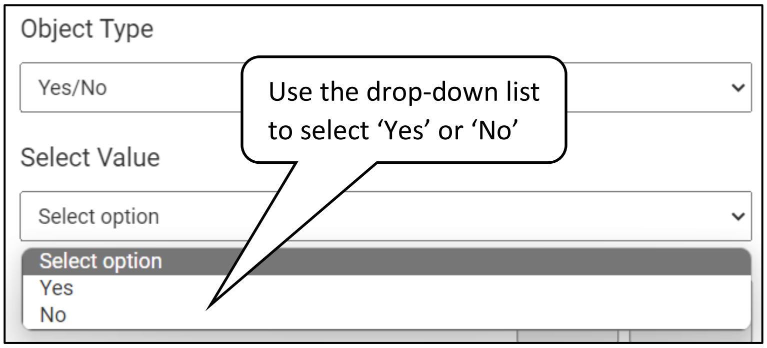
4. For the DateTime, Number, Hyperlink, Currency and Text options you will see an additional field underneath the object type, enabling you to enter the value you want to save.



5. For Documents and Pictures you will be given an additional field 'Browse Attachment', enabling you to upload a chosen file. The only difference between these options is for documents you also have the choice to save the file as a template document, if this is required tick the box labelled 'This is a template document'.

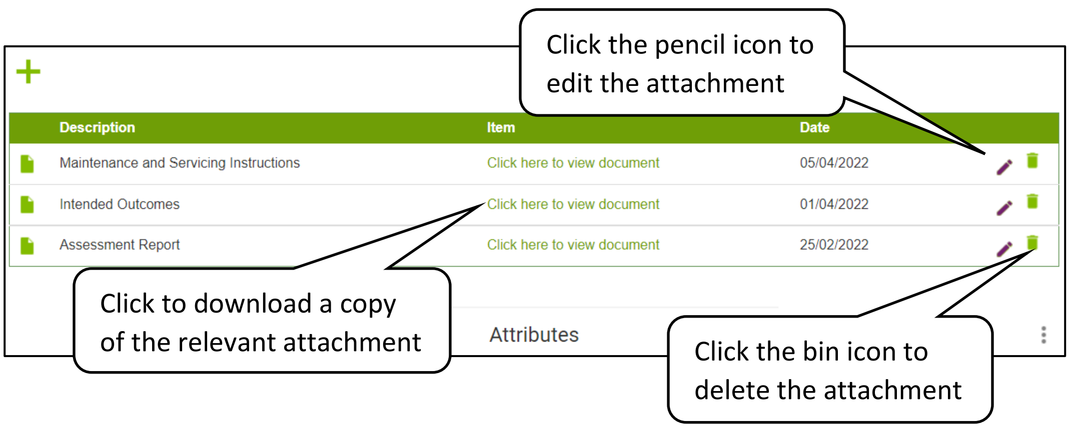


6. You can also add in a Yes/No field. Once this object type is selected you will see an additional 'Select Value' drop-down, enabling you to select either 'Yes' or 'No' from the list. Click 'Save'.

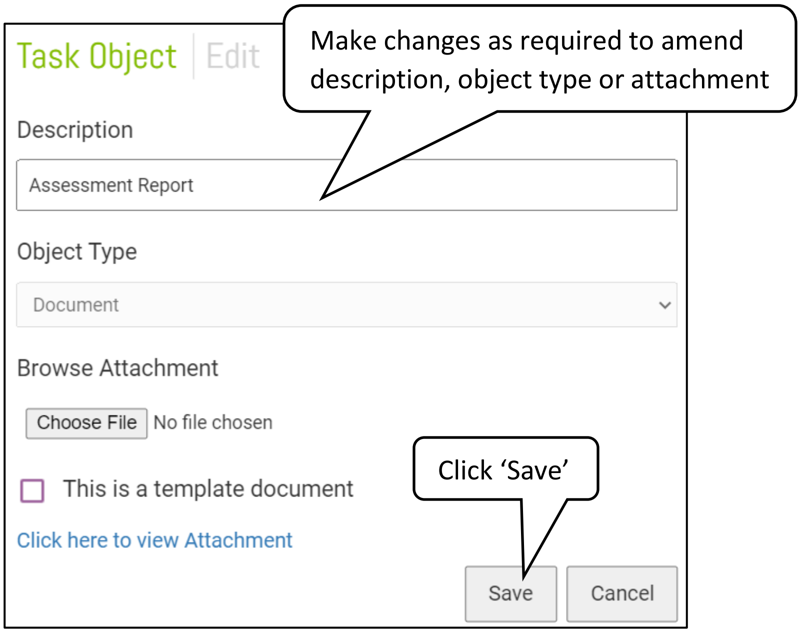


You will now see any saved attachments listed in your attributes tile on the objects page, the overview will show the description and date the attachment was uploaded.

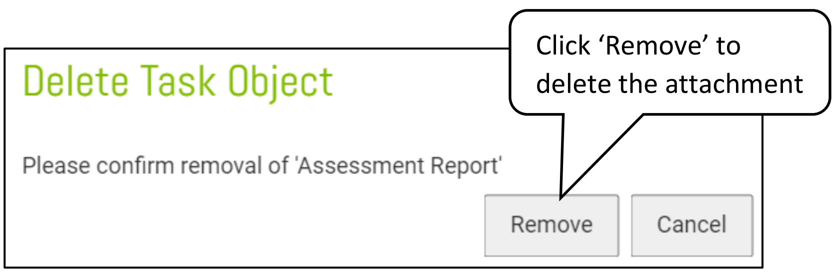
7. To download a copy of any of the attachments listed, click the link 'Click here to view document' on the corresponding row.



8. To edit an existing attachment, click on the pencil icon to the right on the corresponding row to open the edit screen. Make any changes as required and click 'Save'.



9. To delete an existing attachment, click on the bin icon to the right on the corresponding row. You will always get a confirmation box before the software will delete data, click 'Remove' to delete the attachment.



5.6.3 PAS 2035 Documents

Although documents can be added into the project from any activity, by using the attributes tile, you will see in certain activities an additional 'PAS 2035 Documents' tile. This is to add in specific documents which are a requirement for the PAS process, these files will be included in the overview page for any selected address.

The documents are collected throughout the stages of the project as below.

Preliminaries

- Contract/Invoice
- Advice Report
- Intended Outcomes

Risk Assessment

- Risk Assessment

Whole House

- Assessment Report
- Energy report
- Air Permeability Test

Design

- Retrofit Design
- Medium Term Low Carbon Plan
- Improvement Option Evaluation
- Pre-Installation Building Inspection

Handover

- Product warranty
- Insurance guarantee
- Other
- Commissioning checklist
- Handover documents for client
- Claim of compliance PAS2035
- Claim of compliance PAS2030
- MCS Compliance Certificate

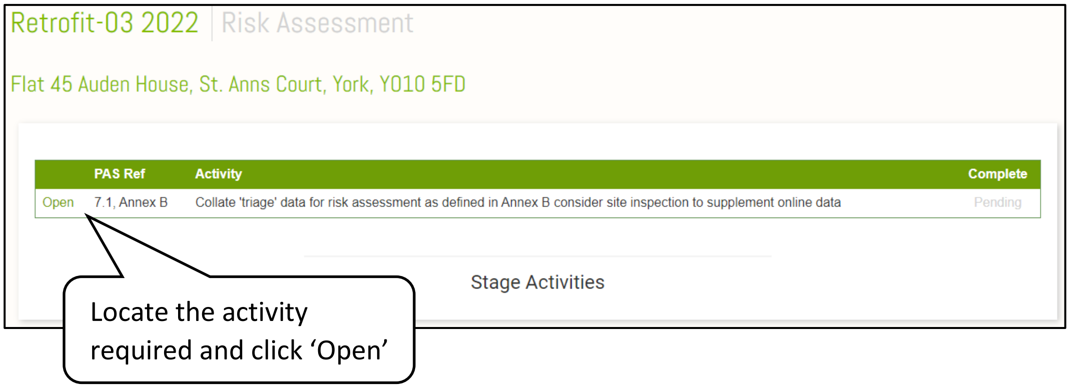
Evaluation

- Monitoring and evaluation outcomes

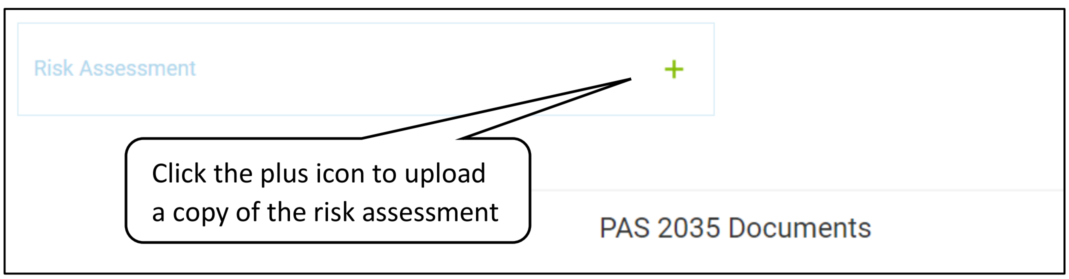
PAS 2035 Documents

In each case the same process is used to add in the document, please see example below for inserting a copy of the risk assessment (this is accessed within the 'Risk Assessment' stage in the activity PAS Ref 7.1, Annex B).

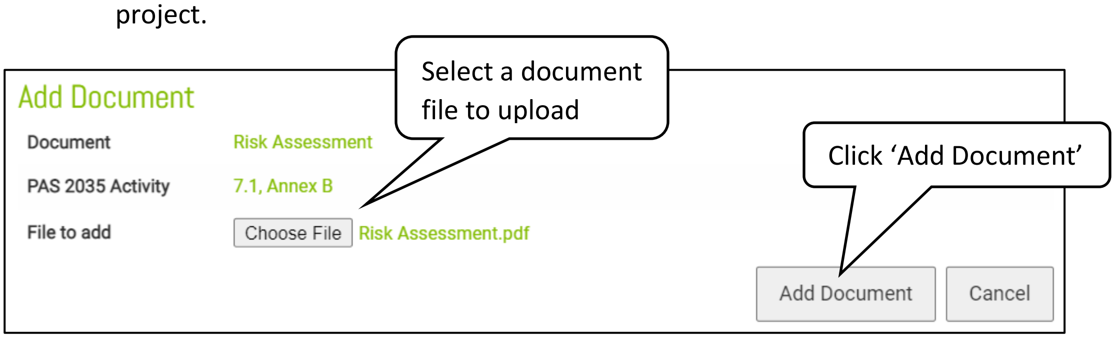
1. Select an address and navigate to the 'Risk Assessment' section. Click 'Open' next to the activity and you will see the required document listed in the 'PAS 2035 Documents' tile (this will show as a faded box until a file is uploaded).



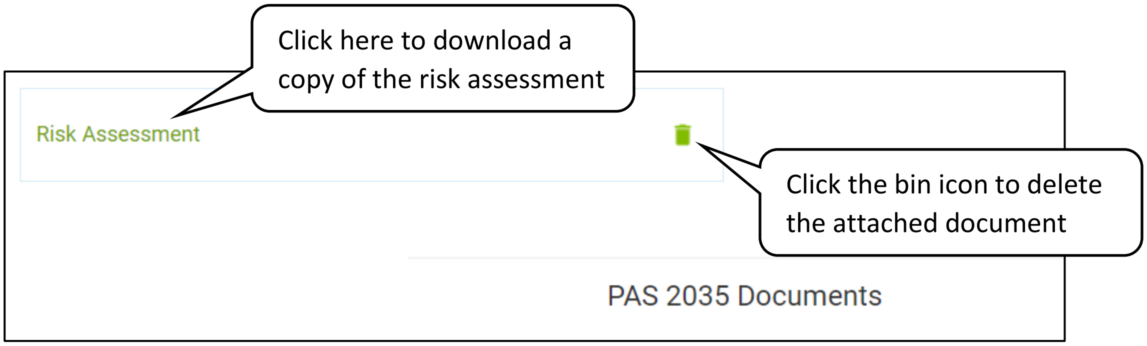
2. Click on the plus icon to open the 'Add Document' display.



3. The 'Document' and 'PAS 2035 Activity' are already linked. Click 'Choose File' and select the relevant document. Click 'Add Document' to upload the risk assessment to the project.



4. Once uploaded, you can download a copy of the document by clicking in the 'Risk Assessment' box. There is also a small bin icon where the document can be removed if needed.

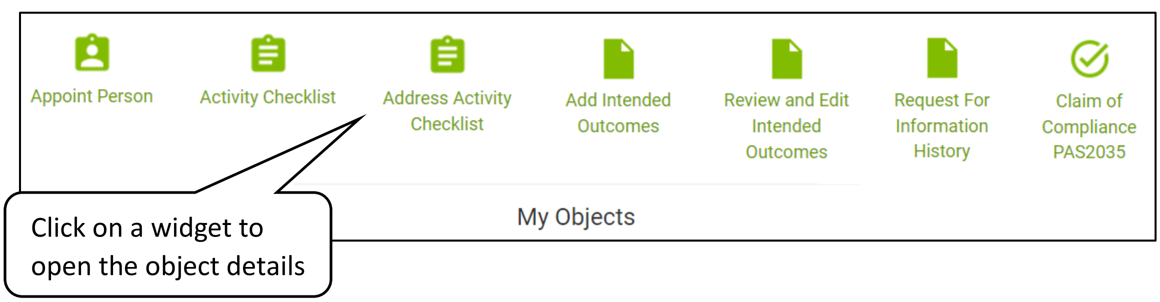


NOTE Any documents updated within the 'PAS 2035 Documents' tiles throughout the project will also appear in your attributes tile where they can be viewed, edited or deleted.

5.7 Objects

Throughout the project, there are a number of instances where further information is required in addition to any attachments being recorded. In these cases, objects have been designed to enable the inputting process.

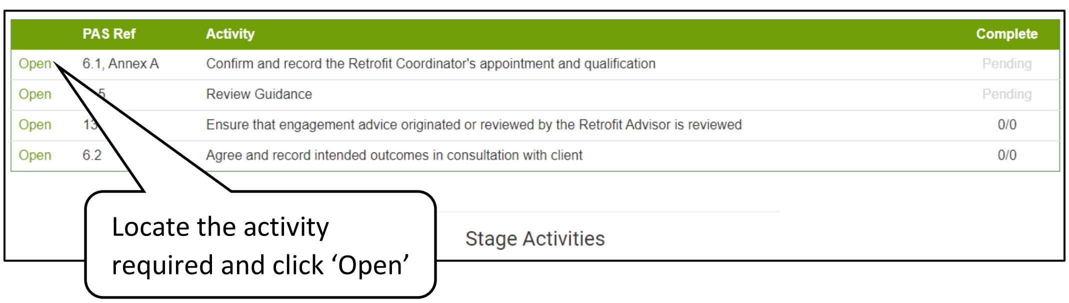
When you open an activity where an object has been assigned, you will see the 'My Objects' tile with the associated object widgets. Click on the object to open it, there are various objects each created with a different purpose, as outlined below.



5.7.1 Appoint Person

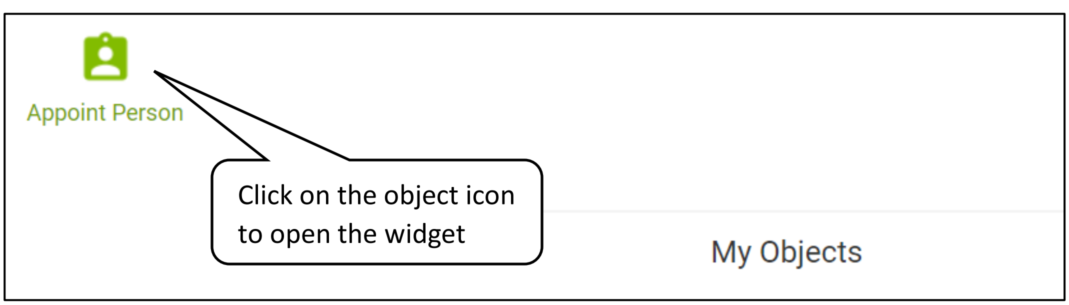
On the project overview page you will see a 'PAS 2035 Appointments' tile. This displays all the roles and details of each person who has been appointed to the position for the project. As shown below, these will remain unassigned until the activity is completed at the relevant stage.

In each case the same process is used to assign a role. Please see example below for updating the person responsible for acting as the retrofit coordinator (this is accessed within the ‘Preliminaries’ stage in the activity PAS Ref 6.1, Annex A).

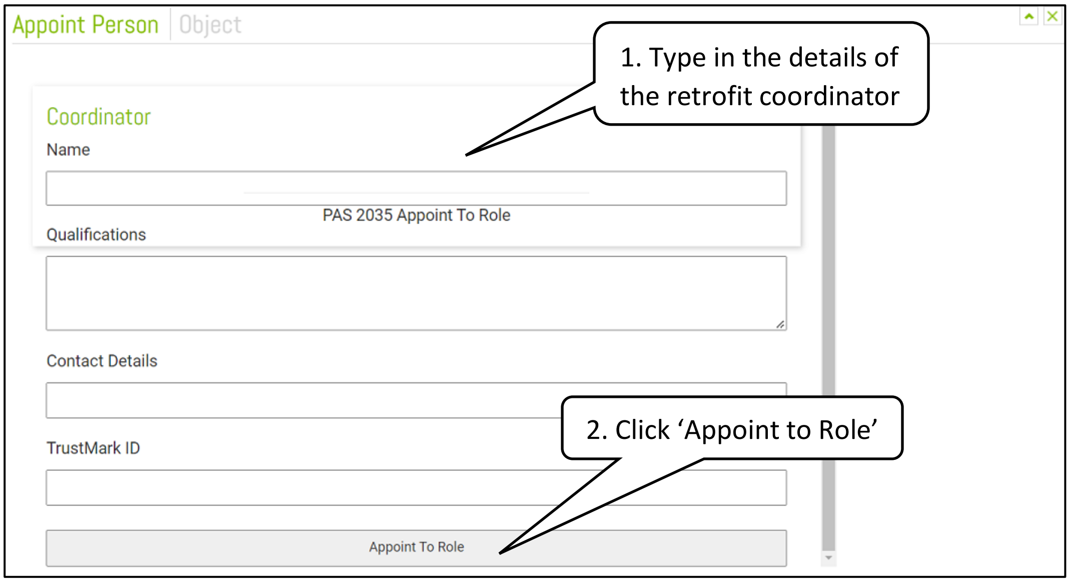


	PAS Ref	Activity	Complete
Open	6.1, Annex A	Confirm and record the Retrofit Coordinator's appointment and qualification	Pending
Open	5	Review Guidance	Pending
Open	13	Ensure that engagement advice originated or reviewed by the Retrofit Advisor is reviewed	0/0
Open	6.2	Agree and record intended outcomes in consultation with client	0/0

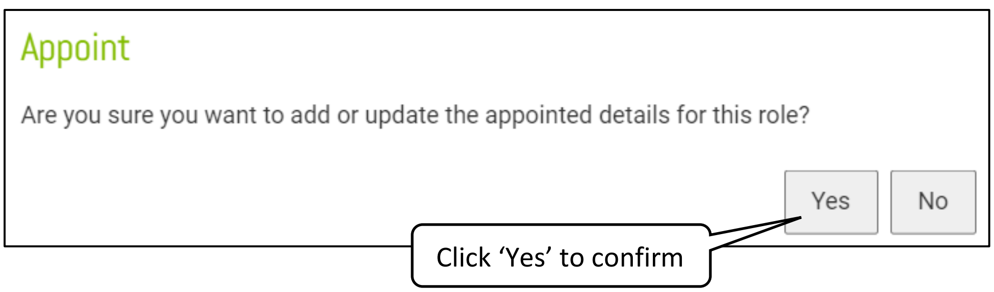
1. Click ‘open’ next to the activity to open the ‘Objects’ page.
2. Locate the ‘My Objects’ tile and click the ‘Appoint Person’ widget to open it.



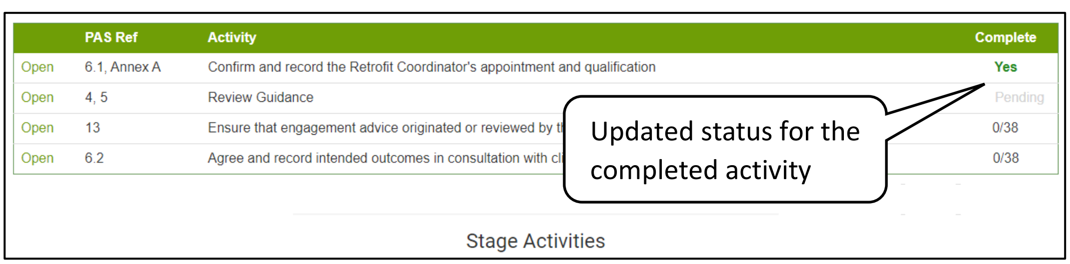
3. Each field is free text, type in the Name, Qualifications and Trustmark ID of the retrofit coordinator you want to assign and click 'Appoint to Role'.



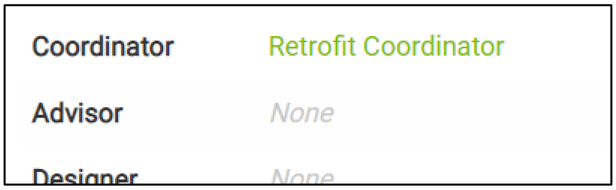
4. Click 'Yes' to confirm.



5. When you return to the stage activities list, the completed status will now be updated, stating 'Yes' next to the item and marked in green to show it has been done.

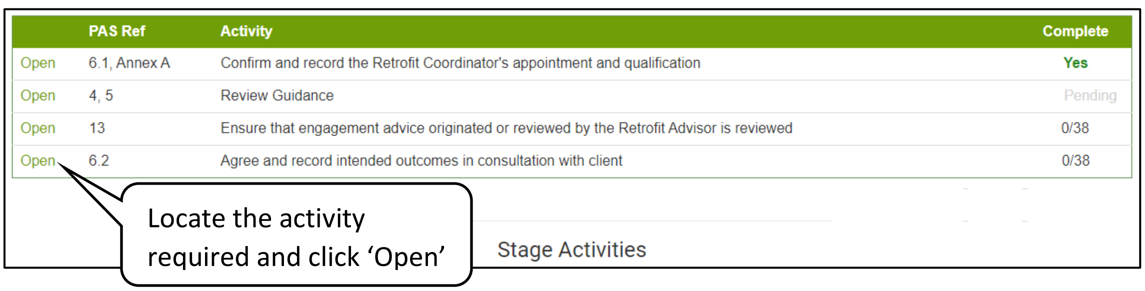


6. Once assigned, the 'PAS 2035 Appointments' tile in your project overview will also be updated to show the name of the person allocated to the role.



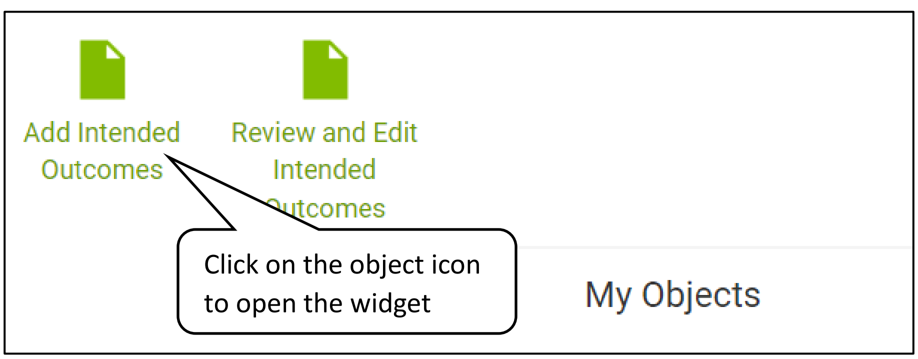
5.7.2 Add Intended Outcomes

Intended outcomes should be defined during the preliminary stage of the project. They are set up for individual addresses, however, can be updated for one or multiple addresses simultaneously by using the ‘Add Intended Outcomes’ object within activity PAS Ref 6.2.

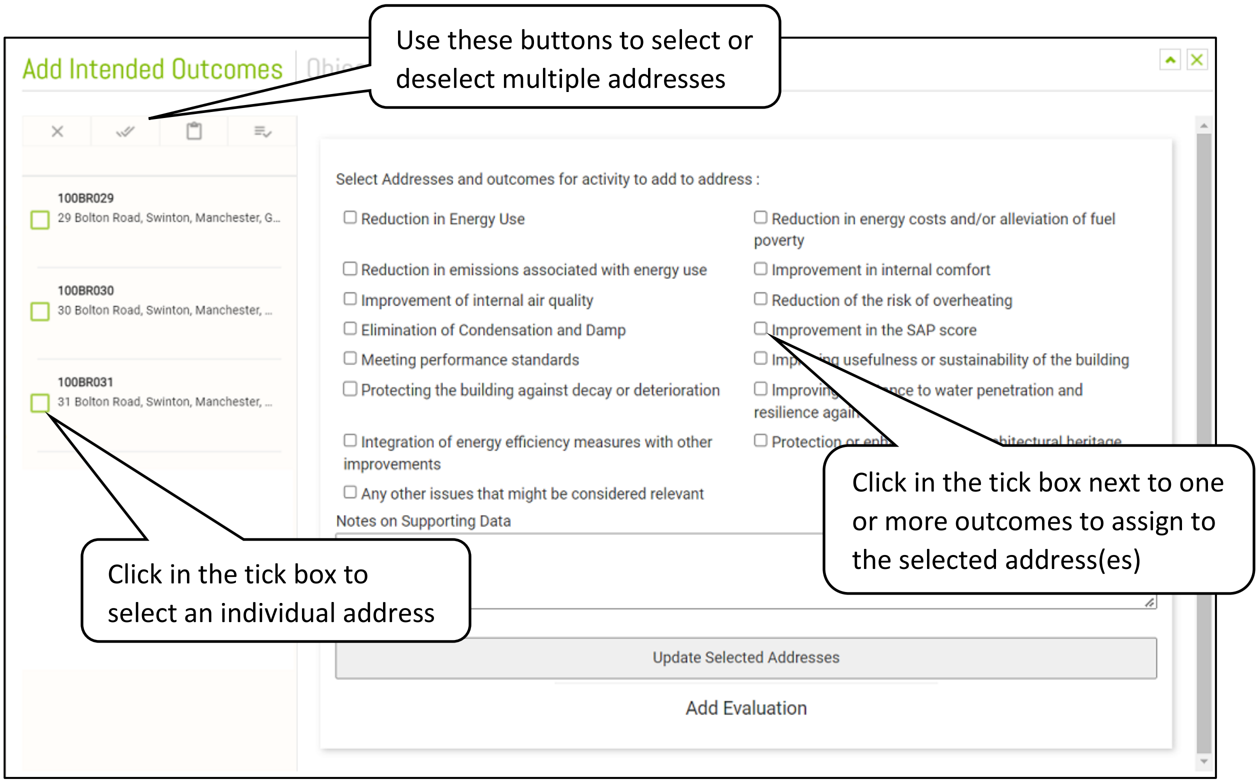


	PAS Ref	Activity	Complete
Open	6.1, Annex A	Confirm and record the Retrofit Coordinator's appointment and qualification	Yes
Open	4, 5	Review Guidance	Pending
Open	13	Ensure that engagement advice originated or reviewed by the Retrofit Advisor is reviewed	0/38
Open	6.2	Agree and record intended outcomes in consultation with client	0/38

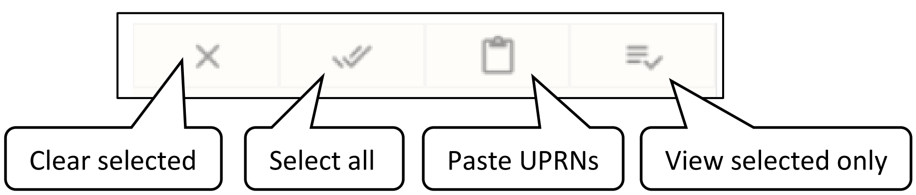
1. Click ‘open’ next to the activity to open the ‘Objects’ page.
2. Locate the ‘My Objects’ tile and click the ‘Add Intended Outcomes’ widget to open it.



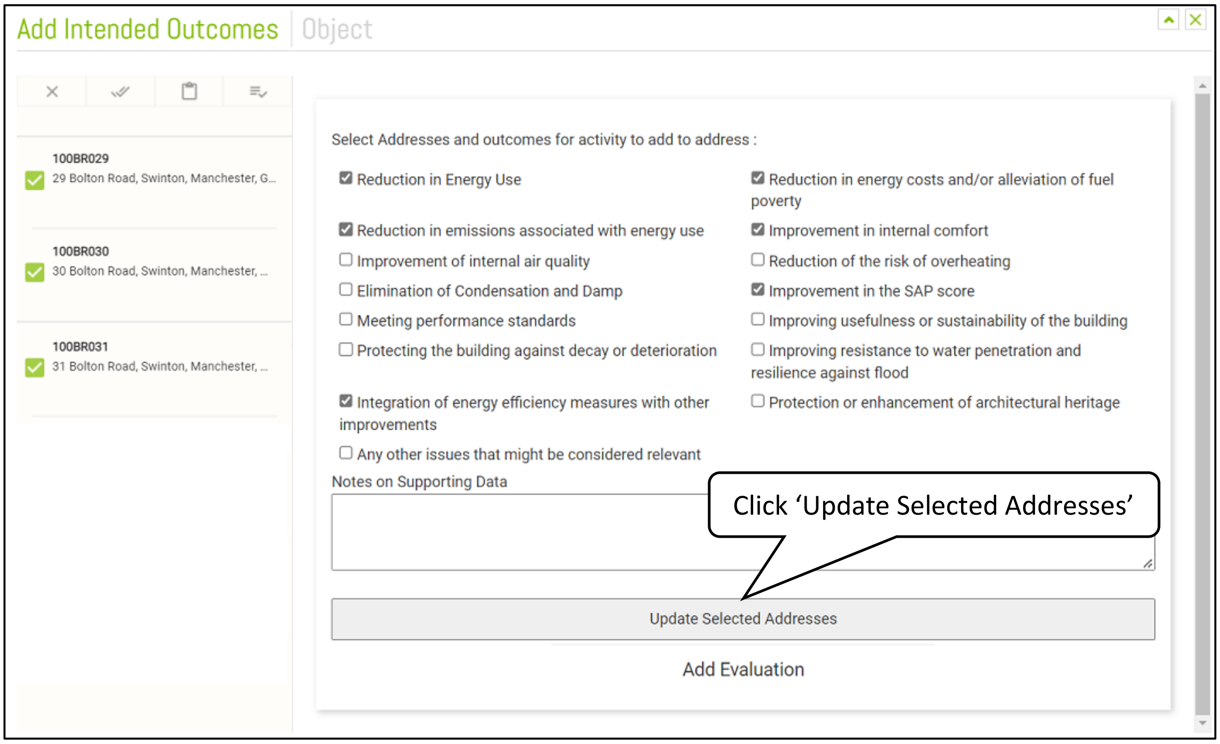
3. You now have the object displaying a list of your project addresses on the left and the full list of available outcomes on the right. Select the properties you want to update and then choose the applicable outcomes you want to assign by using the tick box to the side of each description.



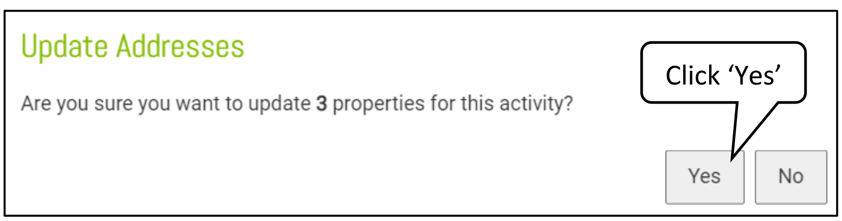
4. You can select addresses individually by clicking the tick box to the left of the property or you can use the buttons at the top of the screen to select or deselect multiple addresses. Please see the use for each function below.



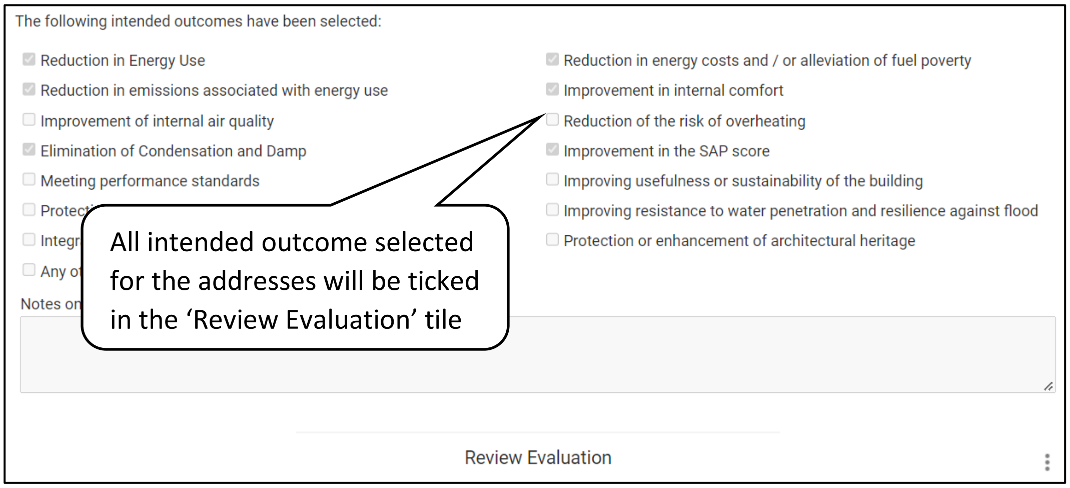
5. Once you have selected the addresses and outcomes required, click ‘Update Selected Addresses’ to save the intended outcomes.



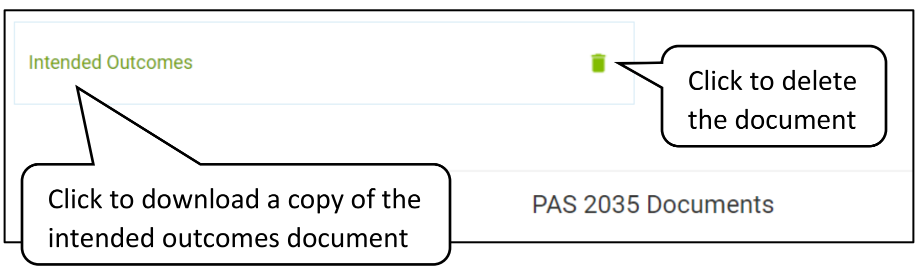
6. Click 'Yes' to confirm.



7. On the address overview page, you will now be able to see the selected intended outcomes within the 'Review Evaluation' tile.

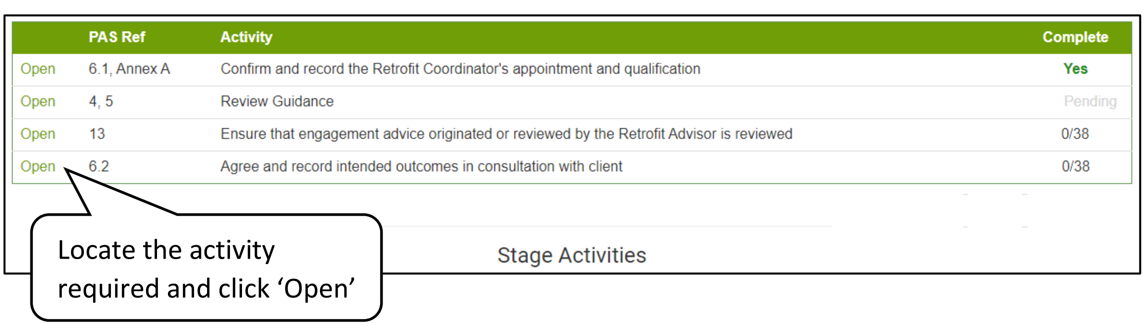


8. An 'Intended Outcomes' document will be produced once outcomes are saved against an address. The document will generate automatically and be saved within the tile in 'PAS 2035 Documents'. Click the heading to download a copy or use the bin icon to delete if you need to remove the document.



5.7.3 Review and Edit Intended Outcomes

To review and edit existing intended outcomes for a project, an additional object 'Review and Edit Intended Outcomes' can be used. This will display the current intended outcomes for each address and allow you to make any changes where required. This object is located within activity PAS Ref 6.2 at the preliminary stage of the project.



	PAS Ref	Activity	Complete
Open	6.1, Annex A	Confirm and record the Retrofit Coordinator's appointment and qualification	Yes
Open	4, 5	Review Guidance	Pending
Open	13	Ensure that engagement advice originated or reviewed by the Retrofit Advisor is reviewed	0/38
Open	6.2	Agree and record intended outcomes in consultation with client	0/38

1. Click 'open' next to the activity to open the 'Objects' page.
2. Locate the 'My Objects' tile and click the 'Review and Edit Intended Outcomes' widget to open it.

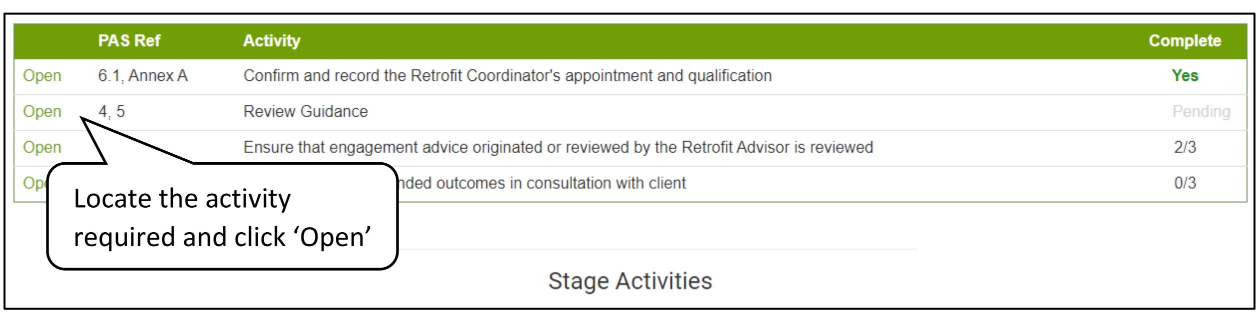
3. You now have the object displaying a list of your project addresses on the left and the full list of available outcomes on the right. Under each of the addresses you will see an overview of how many outcomes have already been recorded for the specified property. Click on any address to see the applied outcomes on the right, you can amend any outcomes (all ticked boxes denote selected outcomes, unticked a box to de-select the outcome for a property) and add supporting notes as required before clicking 'Update Selected Addresses' to save.

NOTE This is the same screen as used to add in new outcomes, please refer to **5.7.2 Add Intended Outcomes** for details on selecting properties at this stage.

5.7.4 Activity Checklist

The activity checklist is an object used to mark activities as completed. This object is present within activities that require updating for the entire project, rather than against individual addresses.

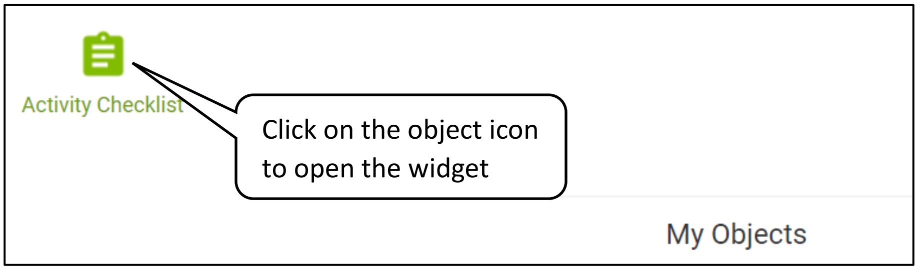
Please see example below for updating the activity checklist for PAS Ref 4, 5.



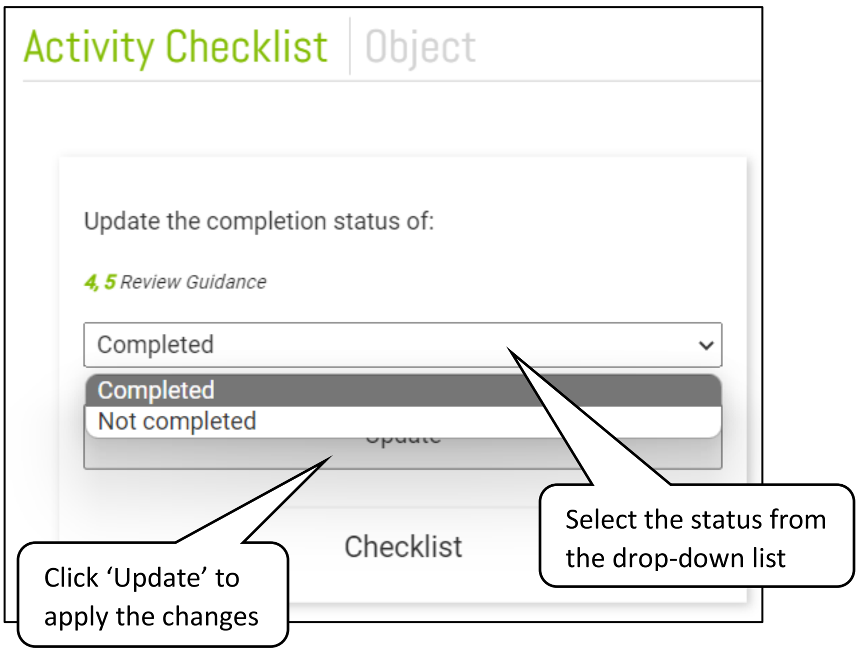
	PAS Ref	Activity	Complete
Open	6.1, Annex A	Confirm and record the Retrofit Coordinator's appointment and qualification	Yes
Open	4, 5	Review Guidance	Pending
Open		Ensure that engagement advice originated or reviewed by the Retrofit Advisor is reviewed	2/3
Op		nded outcomes in consultation with client	0/3

homelife

1. Click 'open' next to the activity to open the 'Objects' page.

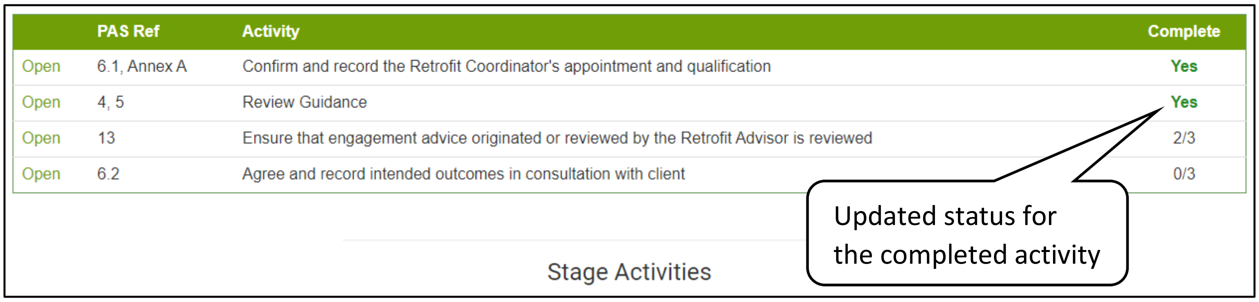


2. Locate the 'My Objects' tile and click the 'Activity Checklist' widget to open it.



3. Use the dropdown list to select the new status.
4. Click 'Update'.

5. Click 'Yes' on the confirmation box to apply the changes on the stage activities page.
6. When you return to the stage activities page you will now see the updated progress against the task. As shown below, this has updated from Pending to completed 'Yes'.

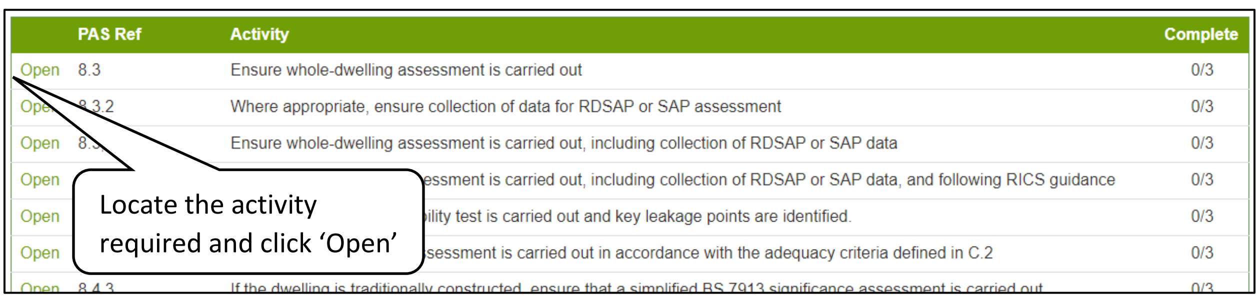


Repeat steps 1-6 to update each activity where you see the ‘Activity Checklist’ widget available in the ‘My Objects’ tab within stage activities.

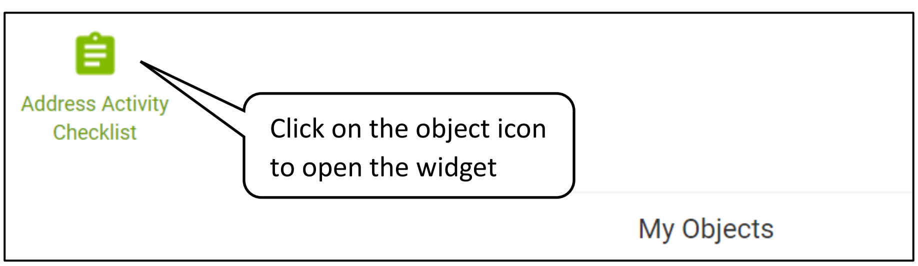
5.7.5 Address Activity Checklist

The address activity checklist is an object used to mark activities as completed. This object is present within activities that require updating at address level, rather than activities which apply for the entire project. The object allows you to update either individual or multiple addresses at once to save you having to access the same widget from every property.

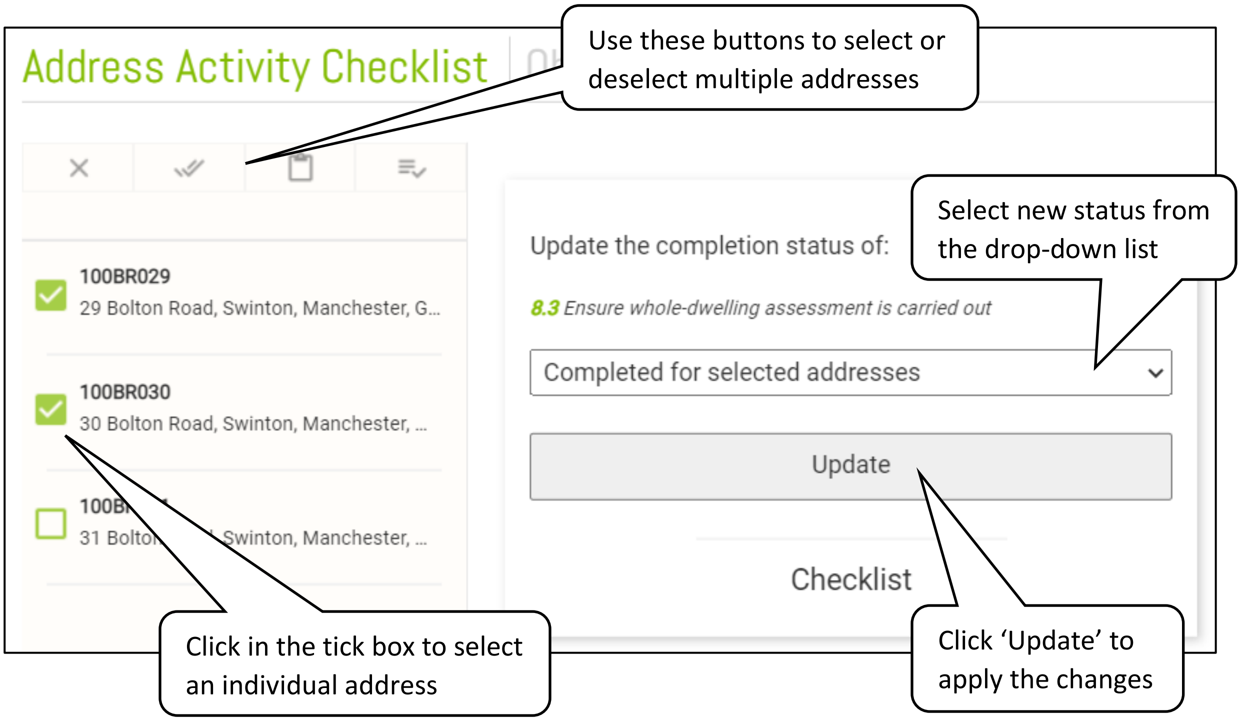
Please see example below for updating the address activity checklist for PAS Ref 8.3.



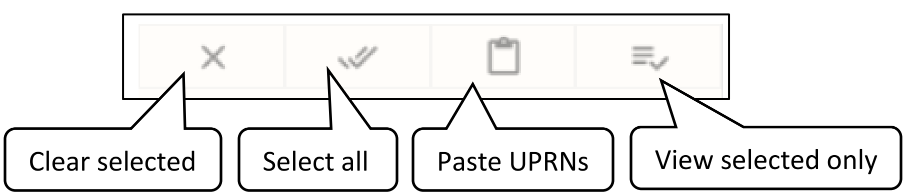
1. Click ‘open’ next to the activity to open the ‘Objects’ page.
2. Locate the ‘My Objects’ tile and click the ‘Address Activity Checklist’ widget to open it.



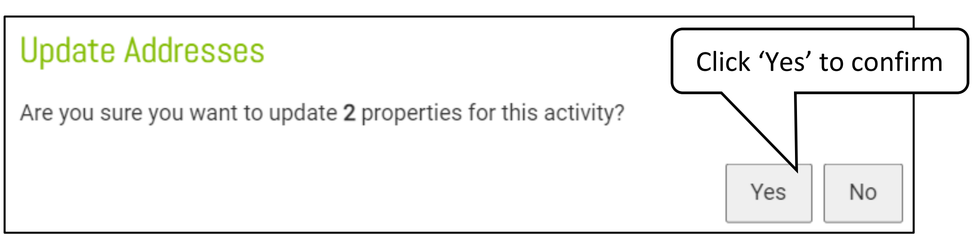
3. To the left of the screen, you will see a list of all addresses currently in the project and on the right is the checklist tab to update. Select the properties you want to update and then use the drop-down list to choose to update as required, either complete or not complete. Click 'Update'.



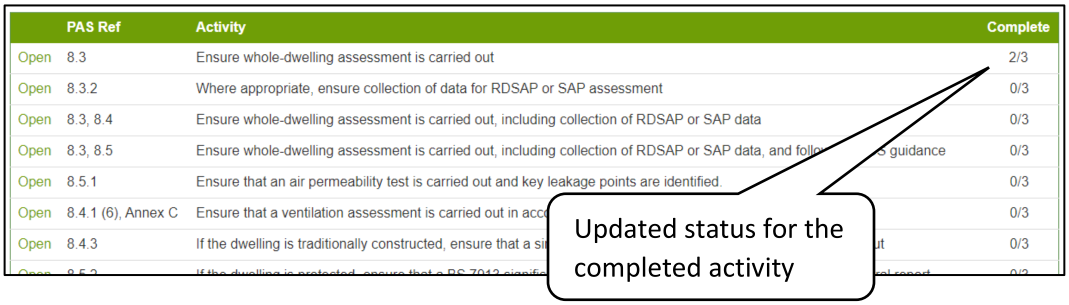
4. You can select addresses individually by clicking the tick box to the left of the property or you can use the buttons at the top of the screen to select or deselect multiple addresses. Please see the use for each function below.



5. Click 'Yes' to confirm the update.



6. When you return to the stage activities page you will now see the updated progress against the task. As shown below, this has updated to 2/3 to reflect the two addresses that were marked as complete.



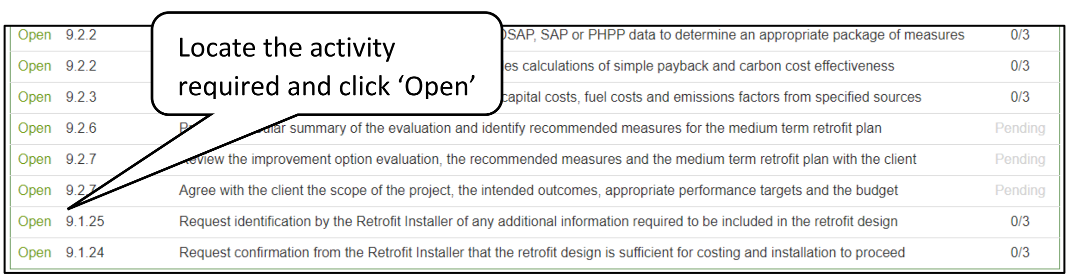
Repeat steps 1-6 to update each activity where you see the ‘Address Activity Checklist’ widget available in the ‘My Objects’ tab within stage activities.

5.7.6 Request for Information History

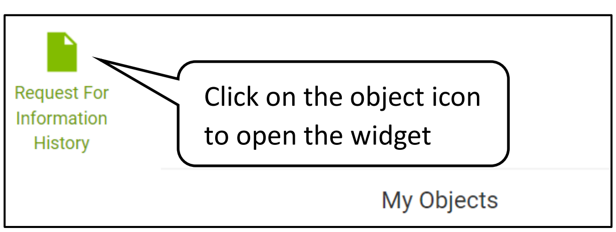
The request for information history is an object used to keep a record of all data requests made throughout the project. The requests are shown for the entire project rather than individual addresses so if there is anything required for a specific address, this should be made clear in the summary or details section of the request.

Please see example below for updating the address activity checklist for PAS Ref 9.1.25.

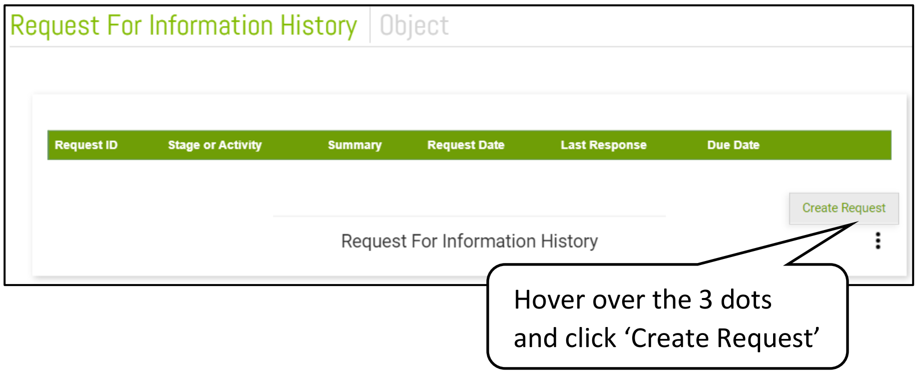
1. Click ‘open’ next to the activity to open the ‘Objects’ page.



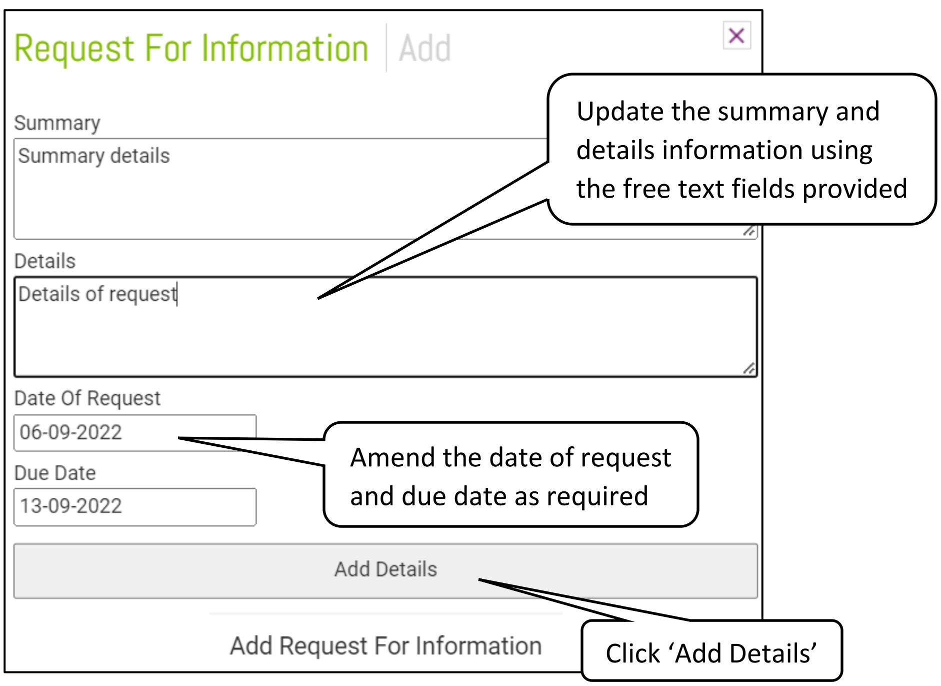
2. Locate the ‘My Objects’ tile and click the ‘Request for Information History’ widget to open it.



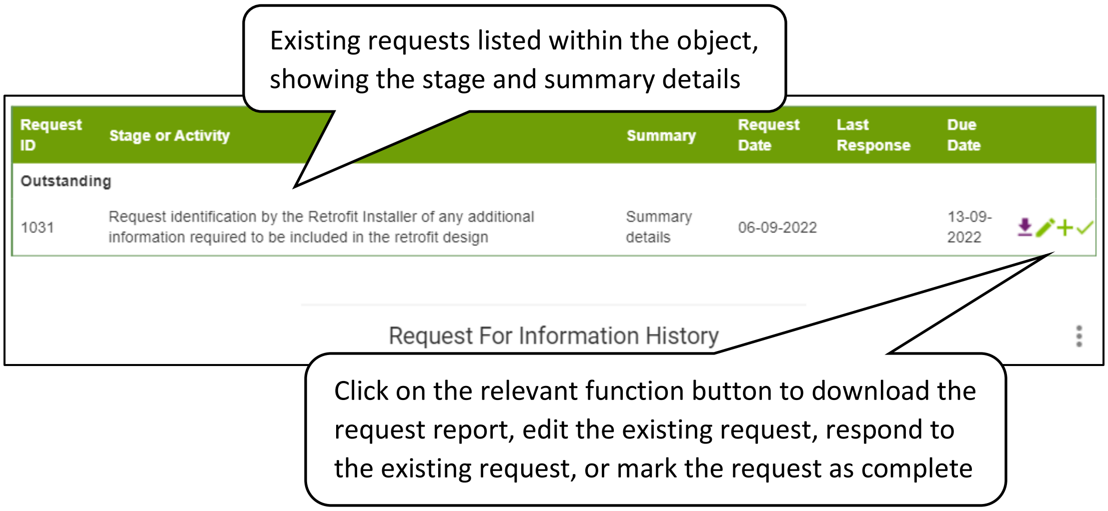
3. The object will open in a new window to show any existing requests made. To add a new item, hover over the 3 dots in the bottom right and click 'New Request'.



4. Use the free text fields to update the summary and details information.
5. Amend the date of request and due date as required. By default, the date of request will show as todays date with the due date one week later, however this can be updated manually by either typing in the date needed or clicking in the field and selecting a date from the pop-up calendar.
6. Click 'Add Details' to save your changes.

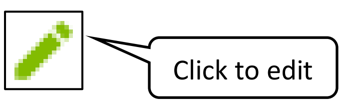


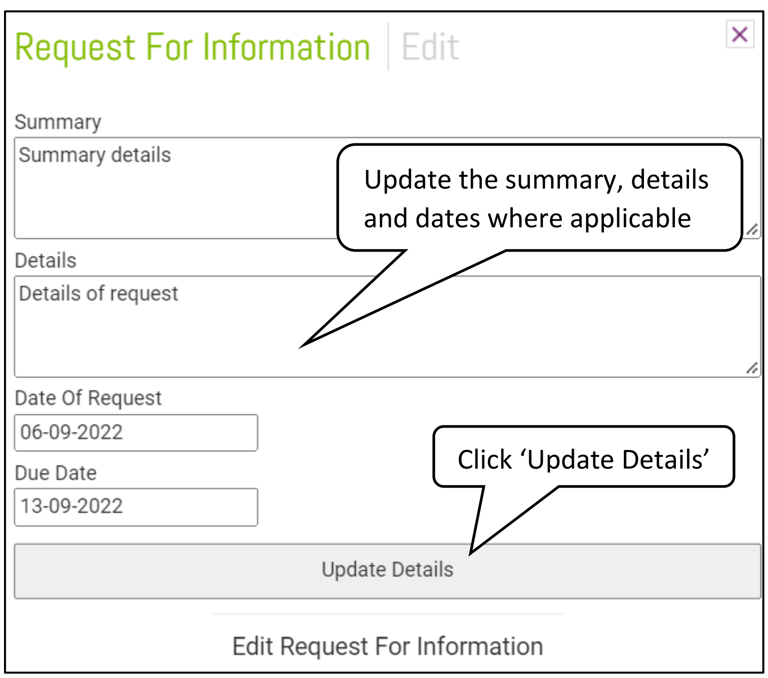
When you next return to the object, you will see the request you have made listed. At this point you have some additional options, to either add a new request (as shown in steps 3-6 above) or to amend the existing request.



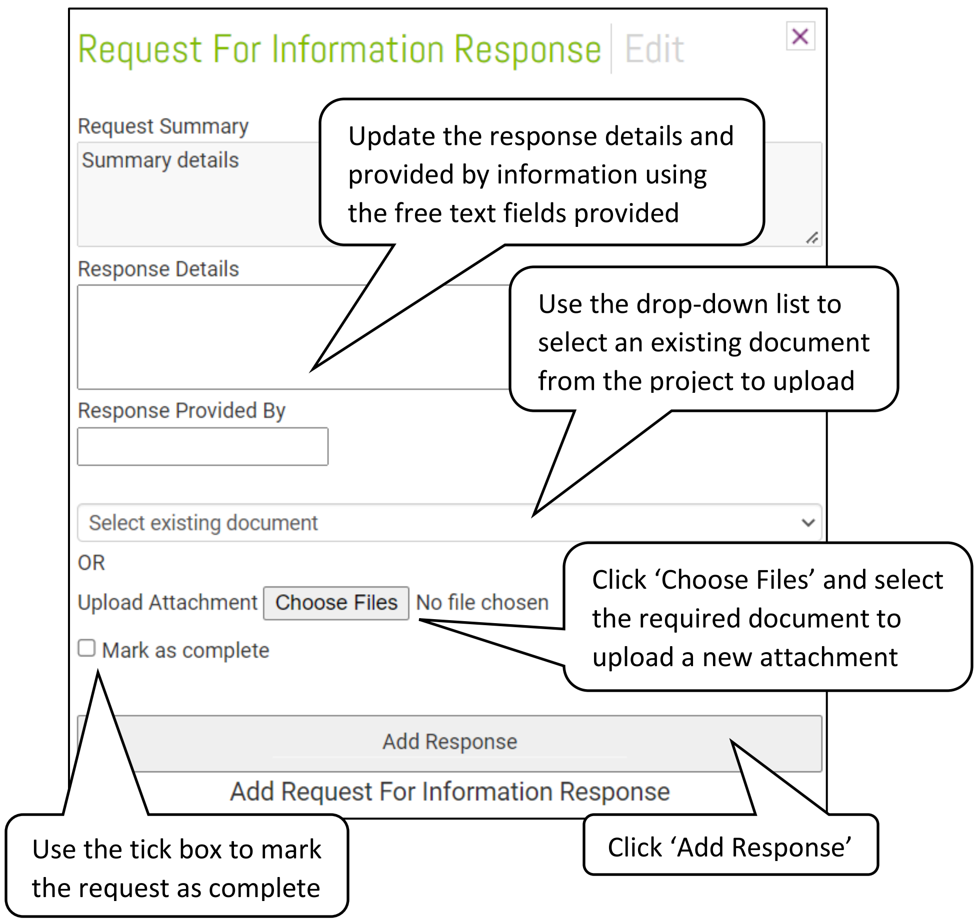
7. Click on the download icon to generate a copy of the request report in word format.

8. Click on the pencil icon to edit the existing request, this will re-open the object widget. Make any changes as required and click ‘Update Details’ to save.





9. Click on the plus icon to add a response to the existing request. A new response window will open allowing you to review the request summary and add in new response details. There is also an option to add in any supporting attachments, click 'Choose Files' and select the relevant document to upload.
If the response is sufficient to fulfil the request, tick the box to mark as complete. Click 'Add Response' to save.



10. Click on the tick icon to mark the request as complete. Once this has been done, the only option against the request will be to download the report – all other editing buttons will disappear and you will not be able to return to the request to make any further changes.

Request ID	Stage or Activity	Summary	Request Date	Last Response	Due Date	
Complete						
1031	Request identification by the Retrofit Installer of any additional information required to be included in the retrofit design	Summary details	06-09-2022	06-09-2022	13-09-2022	

Once completed, the 'Last Response' field will be populated with the date of response and clicking the eye icon will open a window providing an overview of the update.

Details	Provided By	Added By	Date Of Response	Attachments
Information provided.	RB	Rebecca Bootman	06-09-2022	

5.8 Preliminaries

The first stage of the project is to complete the preliminary tasks, under your role title to the left of the screen select 'Preliminaries' to review the stage activities.

The associated stage activities are below. At this point you are required to confirm and record the appointment of the retrofit coordinator, agree intended outcomes, review guidance and ensure any engagement advice has been reviewed.

	PAS Ref	Activity	Complete
Open	6.1, Annex A	Confirm and record the Retrofit Coordinator's appointment and qualification	Pending
Open	4, 5	Review Guidance	Pending
Open	13	Ensure that engagement advice originated or reviewed by the Retrofit Advisor is reviewed	0/3
Open	6.2	Agree and record intended outcomes in consultation with client	0/3

Stage Activities

Please see details on how to update activities and use objects in sections **5.6 Project Stages** and **5.7 Objects**.

5.9 Risk Assessment

The risk assessment tasks are an important step to determine any risks prior to continuing with the survey stage. It is also at this point that the risk path (A, B, or C) is determined, which has an impact on the requirements of the overall project.

	PAS Ref	Activity	Complete
Open	7.1, Annex B	Collate 'triage' data for risk assessment as defined in Annex B consider site inspection to supplement online data	0/3
Open	7.1, 7.2, Annex B	Determine and record the risk path (A, B or C) for the project in accordance with the criteria defined in Annex B	Pending

Stage Activities

There are two activities to complete as part of the risk assessment. Please see details on how to update activities and use objects in sections **5.6 Project Stages** and **5.7 Objects**.

5.10 Whole House

The whole house stage is where records pertaining to the retrofit assessment survey and supporting data is stored. This includes the whole-dwelling assessment and information collected in relation to energy, air permeability, ventilation along with more specific details gathered such as construction and defects logged during the inspection.

	PAS Ref	Activity	Complete
Open	8.3	Ensure whole-dwelling assessment is carried out	0/3
Open	8.3.2	Where appropriate, ensure collection of data for RDSAP or SAP assessment	0/3
Open	8.3, 8.4	Ensure whole-dwelling assessment is carried out, including collection of RDSAP or SAP data	0/3
Open	8.3, 8.5	Ensure whole-dwelling assessment is carried out, including collection of RDSAP or SAP data, and following RICS guidance	0/3
Open	8.5.1	Ensure that an air permeability test is carried out and key leakage points are identified.	0/3
Open	8.4.1 (6), Annex C	Ensure that a ventilation assessment is carried out in accordance with the adequacy criteria defined in C.2	0/3
Open	8.4.3	If the dwelling is traditionally constructed, ensure that a simplified BS 7913 significance assessment is carried out	0/3
Open	8.5.2	If the dwelling is protected, ensure that a BS 7913 significance assessment is carried out and consider a structural report	0/3
Open	8.6.1, 8.6.2	Report the whole-dwelling assessment to the Retrofit Designer, together with photographs and RDSAP, SAP or PHPP data	0/3
Open	8.6.3	Ensure that the whole-dwelling assessment report identifies any defects that must be rectified prior to retrofit	0/3
Open	8.2, Annex A	Confirm and record the Retrofit Assessor's appointment and qualification, appropriate to risk path	Pending
Open	8.6.5, 9.1.5	Ensure that any additional information required by the Retrofit Designer is requested and added to the assessment report	0/3

Stage Activities

Please see details on how to update activities and use objects in sections **5.6 Project Stages** and **5.7 Objects**.

5.11 Design

The design stage is where the largest number of activities are completed. This covers steps to identify any issues or missing information from the whole house assessment before compiling the design, ensuring that the details included are fit for purpose for each individual dwelling. There are also activities to record compliance stages, project scope, intended outcomes and liaising with the client.

	PAS Ref	Activity	Complete
Open	8.6.5, 9.1.5	Ensure that the Retrofit Designer identifies any information missing from the assessment report and request it	0/3
Open	9.1.12, Annex C	If the existing ventilation is assessed as inadequate, arrange for repairs compliant with C.2 Notes 2-5 if possible	0/3
Open	9.1.12, Annex C	If the existing ventilation is assessed as inadequate and cannot be repaired, ensure a upgrade compliant with C.3 is specified	0/3
Open	9.1.13, Annex D	Ensure that the retrofit design includes provision for managing interactions between measures	0/3
Open	9.1.14, Annex D	Ensure that the retrofit design includes appropriate construction details for measure interactions coded yellow in Figure D.1	0/3
Open	9.1.15	Ensure that the specified construction details eliminate thermal by-pass, minimise thermal bridging and maintain airtightness	Pending
Open	9.1.16, Annex D	Ensure that the retrofit design includes compatible specifications for interactions coded orange in Figure D.1	Pending
Open	9.1.17, Annex D	Ensure that the retrofit design does not include combinations of measures coded red in Figure D.1	Pending
Open	11.1.1	Ensure that the Retrofit Designer includes in the retrofit design appropriate requirements for testing installed measures	Pending
Open	11.2.1	Ensure that the Retrofit Designer includes in the retrofit design appropriate requirements for commissioning installed measures	Pending
Open	11.2.2	Where multiple measures are proposed ensure that the design requires building services to be finally commissioned together	Pending
Open	12.1.1, 12.1.2	Ensure that the Retrofit Designer includes in the retrofit design appropriate requirements for handover of installed measures	Pending
Open	9.1.6	Ensure that the Retrofit Designer identifies all the technically applicable improvement options	Pending
Open	9.1.7	Ensure that the Retrofit Designer reviews the technically applicable measures with the client and agrees which to apply	Pending
Open	9.2.3	If the occupancy pattern is known, adjust the improvement option evaluation calculations to allow for actual occupancy	0/3
Open	9.2.4	If the dwelling is traditionally constructed, ensure that the retrofit design is consistent with the guidance in BS 7913	0/3
Open	9.2.5, Annex X	If fabric measures are proposed, assess existing ventilation and if appropriate include ventilation upgrade in the improvements	Pending
Open	9.2.8	Ensure that the retrofit design includes appropriate measures to inhibit overheating during the installed life of the measures	Pending
Open	9.2.9	Ensure that measures to inhibit overheating include load reduction, solar shading, ventilation and thermal capacity	Pending
Open	9.3.10	Ensure that the retrofit design specifies an appropriate sequence of installation of the proposed measures	Pending
Open	9.3.2	If the dwelling is protected, ensure that significance is considered, and measures are identified in accordance with BS 7913	Pending
Open	9.3.3	If fabric measures and/or a ventilation upgrade are proposed, ensure that the retrofit design includes an airtightness standard	Pending
Open	9.3.3	If the retrofit design specifies an airtightness standard, ensure that it also requires compliance to be demonstrated by testing	Pending
Open	9.3.3, Note	Where the dwelling shares envelope with other(s), consider and establish a strategy for airtightness testing	Pending
Open	9.1.8	Advise the client on the need for statutory approvals, and either make applications or coordinate applications by others	Pending
Open	9.1.22	Provide the Retrofit Installer with the retrofit design for the agreed measures and any ventilation upgrade	Pending
Open	9.1.23	Provide the Retrofit Installer with a copy of the report of the retrofit assessment	Pending
Open	9.1.26	If installation cost exceeds budget, agree amendments with client and arrange for Retrofit Designer to revise the design	Pending
Open	9.1.26	Provide the Retrofit Installer with any revised design for the agreed measures and any ventilation upgrade	Pending
Open	9.3.4	On request, before installation starts, provide the Retrofit Installer's team with a briefing on key points of the design	Pending
Open	9.3.4	Always provide a briefing if the dwelling is traditionally constructed or protected or challenging targets are proposed	Pending
Open	9.1.27, 13	Ensure that any advice provided to the client during the design stage complies with clause 13	Pending
Open	9.1.2, Annex A	Confirm and record the Retrofit Designer's appointment and qualification, appropriate to risk path	Pending
Open	9.1.3, 9.1.4	Obtain the Retrofit Designer's confirmation that the whole-dwelling assessment report is sufficient for design preparation	0/3
Open	9.1.9 - 9.1.21	Ensure that the Retrofit Designer prepares a PAS 2035 compliant design for the improvements and any ventilation upgrade	0/3
Open	9.2.2	Carry out an improvement option evaluation using RDSAP, SAP or PHPP data to determine an appropriate package of measures	0/3
Open	9.2.2	Ensure that the improvement option evaluation includes calculations of simple payback and carbon cost effectiveness	0/3
Open	9.2.3	Ensure that the improvement option evaluation uses capital costs, fuel costs and emissions factors from specified sources	0/3
Open	9.2.6	Prepare a tabular summary of the evaluation and identify recommended measures for the medium term retrofit plan	Pending
Open	9.2.7	Review the improvement option evaluation, the recommended measures and the medium term retrofit plan with the client	Pending
Open	9.2.7	Agree with the client the scope of the project, the intended outcomes, appropriate performance targets and the budget	Pending
Open	9.1.25	Request identification by the Retrofit Installer of any additional information required to be included in the retrofit design	0/3
Open	9.1.24	Request confirmation from the Retrofit Installer that the retrofit design is sufficient for costing and installation to proceed	0/3

Stage Activities

Please see details on how to update activities and use objects in sections **5.6 Project Stages** and **5.7 Objects**.

5.12 Installation

At the installation stage, activities include overseeing the installation of improvement measures and ensuring the installer has provided evidence of compliance and has uploaded sufficient information to Trustmark.

	PAS Ref	Activity	Complete
Open	10 Note	Obtain from the Retrofit Installer copies of evidence of compliance of the installation with PAS 2030 and/or MCS	Pending
Open	PAS 2030	Ensure that the Retrofit Installer uploads installation documentation to the TrustMark data warehouse(for ECO)	Pending
Open	10	Oversee the installation of improvement measures by the Retrofit Installer in accordance with PAS 2030 and/or MCS	Pending

Stage Activities

Please see details on how to update activities and use objects in sections **5.6 Project Stages** and **5.7 Objects**.

5.13 Commissioning

	PAS Ref	Activity	Complete
Open	11.2.3	Ensure that commissioning of installed measures is carried out in accordance with the retrofit design, PAS 2030 and MCS	Pending
Open	11.3.1	Obtain copies of testing and commissioning certificates as required by the retrofit design and pass copies to the client	Pending
Open	PAS 2030	Ensure that the Retrofit Installer uploads testing and commissioning documents to the TrustMark data warehouse(for ECO)	Pending
Open	11.1.2	Ensure that testing of installed measures is carried out in accordance with the retrofit design, PAS 2030 and MCS	Pending

Stage Activities

At the commissioning stage, activities include ensuring testing and commissioning of the installed measures has been carried out in accordance with the design. It is also a requirement to obtain copies of the commissioning certificates and confirm that the retrofit installer has uploaded sufficient information to Trustmark.

Please see details on how to update activities and use objects in sections **5.6 Project Stages** and **5.7 Objects**.

5.14 Handover

	PAS Ref	Activity	Complete
Open	12.1.4	Recommend to the client that a new or updated Energy Performance Certificate is prepared for each improved dwelling	Pending
Open	12.1.14	If new or updated Energy Performance Certificates are requested, arrange for them to be prepared by a DEA	Pending
Open	PAS 2030	Ensure that the Retrofit Installer uploads handover documents to the TrustMark data warehouse(for ECO)	Pending
Open	12.2	Ensure that the Retrofit Installer hands over the installed measures to the client and occupants	Pending
Open	12.1.3	Obtain copies of the O&M instructions, manuals, warranty and guarantee certificates for all installed products and systems	0/3
Open	12.1.3	Provide the client with copies of all testing and commissioning certificates and all handover documentation	0/3

Stage Activities

During handover, it is important that the installer completes the handover of installed measures and provides copies of all testing/commissioning certificates to the client, along with any other handover documentation. This information will also need to be uploaded to Trustmark to complete the sign off. It is at this stage that the recommendation should be made to the client to carry out a new/updated energy assessment and arrange for one to be carried out if required. Each activity here is designed to allow the upload of any relevant attachments as evidence the task has been completed.

Please see details on how to update activities and use objects in sections **5.6 Project Stages** and **5.7 Objects**.

5.15 Advice

Advice should be offered to all occupants and landlords to ensure they have the appropriate guidance and are aware of the process and what it involves. The activities give an outline of how advice should be provided and give you the ability to record any documents or other attachments to evidence guidance has been provided at particular stages of the project.

	PAS Ref	Activity	Complete
Open	13.1, Annex A	Confirm and record the Retrofit Advisor's appointment and qualification	Pending
Open	31.1.1	Ensure that appropriate retrofit advice is delivered as part of every domestic retrofit project	Pending
Open	31.2.1	Ensure that the Retrofit Advisor uses the specified guidance	0/3
Open	31.2.2	Ensure that retrofit advice is delivered to all occupant(s) of retrofitted dwelling(s) and to any landlord(s)	0/3
Open	31.2.3	Ensure that retrofit advice is delivered in a format that takes account of occupants' language, age, etc	0/3
Open	31.3.1	Ensure that retrofit advice is delivered on initial engagement of a household and at the time of or shortly after handover	0/3
Open	13.3.2	Ensure that engagement advice is originated or approved by a Retrofit Advisor even if delivered online or by telephone	Pending
Open	13.3.3, 13.4.2	Ensure that engagement advice is customised to the occupants' needs and covers the specified topics	Pending
Open	13.3.4, 13.4.5	Ensure that handover advice is coordinated with the Retrofit Installer and customised to measures and intended outcomes	Pending
Open	13.3.4	Ensure that handover advice coordinated with the Retrofit Installer covers the specified topics	0/3
Open	13.4.1	Ensure that advice is delivered at engagement, on completion of IOE, on completion of the design and at or shorty after handover	0/3
Open	13.4.3	Ensure that advice delivered after completion of the improvement option evaluation covers the specified topics	0/3
Open	13.4.4	Ensure that advice delivered on completion of the design is delivered by the Retrofit Designer or the Retrofit Coordinator	0/3
Open	13.4.4	Ensure that advice delivered on completion of the design covers key features of the design, measures and installation process	0/3

Stage Activities

Please see details on how to update activities and use objects in sections **5.6 Project Stages** and **5.7 Objects**.

5.16 Evaluation

The evaluation stage is required to ensure the project is monitored and conforms to the PAS standard. The activities outline each element to be evaluated and there is opportunity to add in attachments as evidence for each item.

	PAS Ref	Activity	Complete
Open	14.2	Confirm and record the Retrofit Evaluator's appointment and qualification, appropriate to risk path	Pending
Open	14.3	Ensure that Basic evaluation is applied to every completed domestic retrofit project, irrespective of risk path	Pending
Open	14.3	If outcomes are not as intended or there are unintended consequences, apply Intermediate evaluation	Pending
Open	14.3.1	If Intermediate evaluation does not explain unintended outcomes or consequences apply Advanced evaluation	Pending
Open	14.3.2	Ensure that Intermediate and Advanced evaluation are only applied with the client's and occupants' consent	Pending
Open	A.6.1, Annex A	For Intermediate or Advanced evaluation, ensure that the Retrofit Coordinator and Evaluator are not the same person	Pending
Open	14.4.1	For Basic evaluation, use a measure-specific questionnaire delivered to the client and occupants(if different)	0/3
Open	14.4.1	Ensure that the Basic evaluation questionnaire covers the specified topics	Pending
Open	14.4.2	Ensure that Basic monitoring data are collated, summarised and reported with any recommendations to client and project team	Pending
Open	14.4.3	Ensure that Basic evaluation is completed and reported within three months of handover of the retrofit work	Pending
Open	14.5.1	Ensure that Intermediate evaluation covers the specified topics, as appropriate to any identified problems	Pending
Open	14.5.2	Ensure that Intermediate monitoring data are collated, summarised and reported with recommendations to client, etc.	Pending
Open	14.5.3	Ensure that Intermediate evaluation is completed and reported within six months of completion of basic evaluation, if possible	Pending
Open	14.6.1	Ensure that Advanced evaluation covers the specified topics, as appropriate to any unresolved problems	Pending
Open	14.6.2	Ensure that Advanced monitoring data are collated, summarised and reported with recommendations to client and project team	Pending
Open	14.6.3	Ensure that Advanced evaluation is completed and reported within two years of completion of basic evaluation, if possible	Pending
Open	14.6.3, Note	Consider whether evaluation reports should be made available to quality assurance bodies, with the client's approval	Pending
Open	14.1	Ensure that every retrofit project is subject to monitoring and evaluation to confirm outcomes and identify problems	Pending

Stage Activities

Please see details on how to update activities and use objects in sections **5.6 Project Stages** and **5.7 Objects**.

5.17 Compliance

The final stage of the project is compliance. The activities listed here allow you to record details of completed compliance and supporting information. Once finalised the activity checklist should be used to mark tasks as completed.

	PAS Ref	Activity	Complete
Open	15.2.1	Identify the type of compliance claim: independent third-party certification, other-party validation or self-assessment	Pending
Open	15.2.2	If providing independent third-party certification, arrange assessment of compliance by a body itself accredited by UKAS	Pending
Open	15.2.3	If providing other-party validation, arrange assessment of compliance by an appropriately qualified independent body	Pending
Open	15.2.4	If self-assessing compliance, collate and present evidence of compliance with PAS 2035 in accordance with EN ISO 14021	Pending
Open	15.2.4	If appropriate upload the qualifications of the Retrofit Advisor, Assessor, Coordinator, Designer and Evaluator to QA body	0/3
Open	15.2.4	If appropriate upload copies of the risk assessment, dwelling assessment, retrofit design and evaluation reports to QA body	0/3
Open	15.3	When claiming compliance by any of the three available methods, use the appropriate specified form of words	Pending

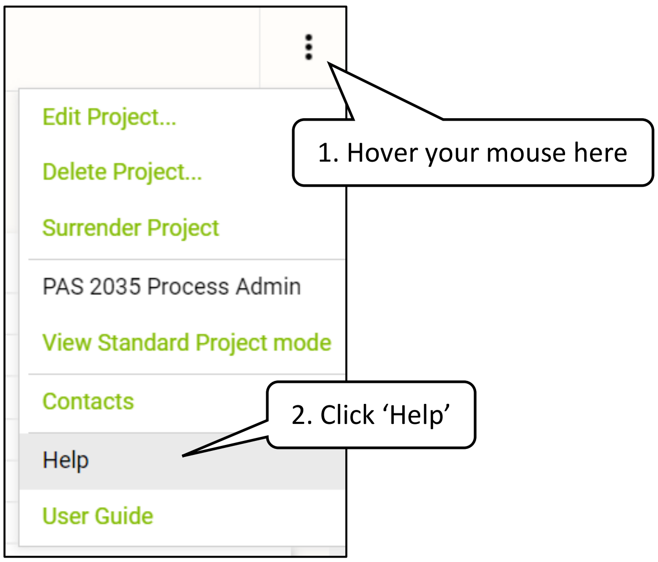
Stage Activities

Please see details on how to update activities and use objects in sections **5.6 Project Stages** and **5.7 Objects**.

6. Help and Support

Homelife has an in-built help section.

1. From the main screen, click on your project to open it. In the top right of the screen under your login credentials you will see 3 dots, hover over this to see the options for your project.
2. Select ‘Help’ from the list.



This will direct you to our knowledgebase page. Selecting a category from the left will update the main screen to show a number of relevant frequently asked questions. There is a search bar at the top of the page so you can narrow down the full list by entering a keyword of your query.

If you experience any errors or need further assistance, there is a ‘Need more Help’ section on the right of the screen with a link to our service desk (where you can raise a support ticket if you have a specific problem or question) and a user guide button to download a copy of the user manual.