

J Bloggs Contractor		Document reference	R06
		Last rev. change date	17/07/2020
		Version number	1.1
		Page	1 of 1
Project number		Date of complaint	
Customer name		Tel No	
Company name		Mobile	
Specifier / GDP		Origin of complaint	
Address:		Site address (If different to customer address)	
Details of complaint:			
Correspondence Register			
Date	Details of correspondence		
Details of remedial work or third party involvement (i.e. insurance company):			
Date complaint resolved		Name	Signature

Formal Sub Contract Agreement

For compliance to PAS2030:2019

Terms & Conditions

The sub contractor agrees to ensure:

- a) That the requirements of the standards for Funded/ECO installations have been read and are understood – to specifically include PAS2030:19 and Green Deal Code of Conduct V5.
- b) That staff provided by the sub contractor have undertaken all appropriate training required for their role in a project/installation and are vocationally competent and that all certifications are up to date and is undergoing continuous personal development.
- c) That all equipment used is calibrated correctly and in good repair.
- d) Will confirm that Building and Planning permissions are either obtained or confirmed to be not required.
- e) That J Bloggs Contractor will be given access to the site to provide training on products (if required) at the commissioning stage.
- f) To inform J Bloggs Contractor of any short falls on deliveries or non-conformities for an installation.
- g) All timescales are understood and that installations are completed in good time or that delays are reported immediately to J Bloggs Contractor.

The undersigned understand that this agreement may be terminated by either company and such termination will be subject to one month's written notice.

Should the undersign sub contractor be found in breach of this agreement, written assurances will be required detailing corrections and preventative actions taken to prevent reoccurrences.

All projects/installations will be undertaken in accordance with PAS2030:2019 and will meet relevant design specifications.

[Signature area for J Bloggs Contractor]

Signed for and on behalf of J Bloggs Contractor

[Signature area for Sub Contractor]

Signed for and on behalf of
Double Click to insert Sub Contractor name.

[Printed name area for J Bloggs Contractor]

Printed name (above)

[Printed name area for Sub Contractor]

Printed name (above)

Date signed [Date field]

Date signed

Date signed [Date field]

Date signed

Project Information Form

CUSTOMER DETAILS

Customer name:	<input type="text"/>	Install date:	<input type="text"/>
Customer address:	<input type="text"/>		<input type="text"/>
	<input type="text"/>		<input type="text"/>
	<input type="text"/>		<input type="text"/>
Post code:	<input type="text"/>	Post code:	<input type="text"/>
Contact names 1:	<input type="text"/>	2:	<input type="text"/>
Contact numbers 1:	<input type="text"/>	2:	<input type="text"/>
G3 EEM(s) to be installed	<input type="text"/>		
Retrofit Coordinator	<input type="text"/>		
Funder/ECO Provider:	<input type="text"/>		

KEY INSTALLATION DATES

Retrofit Design provided	<input type="text"/>	Pre-install inspection date	<input type="text"/>	Install commenced	<input type="text"/>
Installation completed	<input type="text"/>	EEM(s) Commissioned	<input type="text"/>	EEM(s) Handover	<input type="text"/>

PROCESS CONTROL INFORMATION

Pre-Installation Documents	Y/N	Date	Completed by	Signed
R01 Project Information form (acts as job sheet)	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
G01 Enquiry form	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
G02 Customer Acceptance form	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
G03 Survey form	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
Spare	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
Spare	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
Installation Documents		Date	Completed by	Signed
G04 Installation	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	



Handover Documents	Y/N	Date	Completed by	Signed
Guarantee and Warranty information	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
Gas Safety Certificate	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
Electrical Certificate	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
G06 Handover form	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
Operation and safety instructions	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
Service log and requirements	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
Spare	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	
Spare	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	

Project Information Form / Cont Project

7.4 INSTALLATION PROCESS CHANGE

Detail any required process change(s) below

	Y/N	Date	Authorised by	Position
Is the process change required to complete the job?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is the process change a customer request?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Has process change been agreed with Coordinator?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Is the process chargeable?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Has customer (landlord for ECO) agreed to charges?	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Confirm that process change is compatible	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Process change has been undertaken to agreed spec	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

PLANNING PERMISSION

Obtained?

Customer responsible?

Customer signature

MATERIAL REQUIREMENTS / USED

Ordered	Del to Site	Del to Stores	Description	Installed	Non-conforming Ref
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



LABOUR

Day 1	<input type="checkbox"/>
Day 2	<input type="checkbox"/>
Day 3	<input type="checkbox"/>
Day 4	<input type="checkbox"/>

46.2 TOOLING

Tool & Equipment			
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Important note: All tools to be checked each Monday morning or first day of a work week (as per PR4.2 of our QA manual)
 If any tool or equipment is dropped, misused, or is involved in an incident that may cause damage to the item then it must be inspected and recalibrated (for test and analysis tools) and confirmed to be fit for purpose before re-using.

Document	R01
Last rev. change	17/07/2020
Version number	2.1
Project number	

Project Information Form / Cont

DETAILS OF METHOD STATEMENT

Installation Method Form attached? PAS2030:19 Annex ID:

Intermediate inspections required? Action Required (scope of works)

Subcontractor checked for competency?

Details of subcontractor(s) involved with installation as below: (Please include validated competencies)

OPERATIVES 6.5

Operative name	Competence annex	Checked	Briefing given for this installation	Date
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>

7.4.3 INTERNAL FEEDBACK Feedback from operatives either positive or negative on the installation process

Code	Document feedback	Corrective Action / Response
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>



COMMISSIONING DETAILS

Authorised signatory: Signature: Date of sign off:

Signed off by Company

Checked by: Position: Date:

The installation of the energy efficiency measure(s) at and handed over on has been undertaken by using an installation process complying with PAS 2030:19, and all annexes installed are within the scope of this installers' certification with

Passed to Admin to raise final invoice? Final invoice raised? Client hand over pack issued?

Internal Review Meeting

Held at on

Present	Name	Position
Apologies		
Absent		

Minutes	Comments and actions	Action by (initials)
1. Minutes arising		
2. Action taken to resolve previous non-conformities		
3. Customer complaints		
4. Action on non-conforming materials		

Internal Review Meeting

Held at

on

5. Staff training

6. Sub-contractor and supplier issues

7. Corrective and preventive actions

8. Document review

9. Health & Safety review

10. Any other business?

Meeting closed at:

Date of next meeting:

Sub-Contractor Record

Business name		Main telephone	
Contact name		Mobile number	
Invoice address		Fax number	
		E-mail address	
Postcode		Contact name 2:	
		Mobile no. 2:	
Delivery address		Email address 2:	
		Company UTR No.	
		N.I. Number	
Postcode		CIS Registered Y/N	<input type="checkbox"/> <input type="checkbox"/>

Insured Y/N Employers liability limit £ Public liability limit £

Scope of approved works (subject to using staff with certified competencies as detailed below)

List of staff and engineer qualifications and competencies		MCS	NVQ Elec LV2	Electrical Pt P	Electrical Reg	Gas Safe	OFTEC	Other	Other	Other	Date
Staff/Engineer name	Scope of works										
<input type="text"/>	<input type="text"/>	Claimed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	Checked	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	Claimed	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	Checked	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text"/>



Approved by Approved by signature Date

J Bloggs Contractor

Document reference R02
Last rev. change date 30/03/13
Version number 1.00
Page Page 1 of 1

Installation Process Change(s) to Project

Project number [] Date of issue [] Issued by []
Customer name [] Customer Post code []

Description of process change(s)	Additions £	Omissions £
[]	[]	[]
[]	[]	[]
[]	[]	[]
[]	[]	[]
[]	[]	[]
[]	[]	[]
[]	[]	[]
[]	[]	[]
[]	[]	[]
[]	[]	[]
[]	[]	[]
[]	[]	[]
[]	[]	[]
[]	[]	[]

- a) Value of variation(s) for this record []
- b) Value of other variation(s) on previous records []
- c) Original contract value []
- d) Total project value to date []

All figures are in £ sterling and include VAT.

Payment Terms []

Agreed by the customer

To be signed by customer []

Agreed by the Designer

Written authorisation from Coordinator received?

This change to an installation process has been reviewed to ensure compatibility with the installation and of other measures being installed at the same premises, details below:

[]