

Heat Pump Site Survey

A heat pump site survey: property, current heating and insulation, room-by-room measurements and emitters for the heat loss calculation, outdoor unit position, hot water cylinder space and electrics.

1. Property

Project

Client

Site *

Site address

Survey date *

Time

Surveyor *

Property type (choose one)

- ☐ Detached house
- ☐ Semi-detached house
- ☐ Terraced house
- ☐ Bungalow
- ☐ Flat
- ☐ Other

Age of the property (choose one)

- ☐ Before 1919
- ☐ 1919 to 1944
- ☐ 1945 to 1979
- ☐ 1980 to 1999
- ☐ 2000 or later
- ☐ Not known

Bedrooms

People living there

Current heating * (choose one)

- ☐ Mains gas ☐ Oil ☐ LPG ☐ Electric ☐ Solid fuel ☐ Other

Boiler Upgrade Scheme (England and Wales). £7,500 towards an air source or ground source heat pump replacing fossil fuel heating, for the owner of the property, with an MCS certified installer applying on their behalf. Until March 2027 there is an extra £1,500 if the property is heated by oil or LPG and has no mains gas connection. Hybrid systems are not covered.

EPC rating, if known

2. Insulation and fabric

Main wall type (choose one)

- ☐ Cavity, filled
- ☐ Cavity, unfilled
- ☐ Solid
- ☐ Timber frame
- ☐ System built
- ☐ Not known

Loft insulation depth (mm)

Glazing (choose one)

- ☐ Single
- ☐ Double
- ☐ Triple
- ☐ Mixed

Ground floor (choose one)

- ☐ Solid
- ☐ Suspended timber
- ☐ Not known

Draughts, damp or other things that affect heat loss

3. Rooms

MCS installers design heat pumps to MIS 3005-D, the MCS heat pump design standard. It calls for a heat load calculation to BS EN 12831-1 using internal design temperatures no lower than its table (for example living room 21°C, bedroom and kitchen 18°C, bathroom 22°C), and the installer is given the heat loss of each room. Measure every heated room here. This form records the inputs; it does not calculate the heat loss.

Rooms (copy this block for each one)

Room *

Length (m) *

Measuring from a photo gives an estimate. Use a tape for the final figure.

Width (m) *

Measuring from a photo gives an estimate. Use a tape for the final figure.

Ceiling height (m) *

Tape or laser, or measure from a photo of a wall taken square on, with a door as the reference.

Floor area (m²) (if applicable; worked out automatically in the app)

Volume (m³) (if applicable; worked out automatically in the app)

Design temperature (°C)

Number of external walls

Window and door glazing area (m²)

Heat emitter (choose one)

☐ Radiator ☐ Underfloor heating ☐ Fan coil ☐ None

Radiator size and type (for example 1200 x 600 double) (if applicable)

Emitters in this room (copy this block for each one; if applicable)

Type (choose one)

- ☐ Single panel radiator
- ☐ Double panel radiator
- ☐ Triple panel radiator
- ☐ Column radiator
- ☐ Underfloor loop
- ☐ Fan coil
- ☐ Other

Width (mm)

Measuring from a photo gives an estimate.

Height (mm)

Rated output (W at the stated delta T)

Delta T for that rating (°C)

Room heat loss from your calculation (W)

Optional. Fill in once the room-by-room calculation is done in your design software. The form adds the rooms up; it does not calculate heat loss.

Heat loss per m² of floor (W/m²) (if applicable; worked out automatically in the app)

Photos (photos: attach, or note the file names)

Total heated floor area (m²) (worked out automatically in the app)

Heated rooms (worked out automatically in the app)

Total heated volume (m³) (worked out automatically in the app)

Total glazing area (m²) (worked out automatically in the app)

Glazing as a share of the floor area (%) (if applicable; worked out automatically in the app)

Total of the room heat losses entered (W) (if applicable; worked out automatically in the app)

4. Outdoor unit, hot water and electrics

Proposed outdoor unit position *

Outdoor unit position

Stand where the unit would go and mark it, so the installer and the noise check use the same spot.

Distance from the nearest boundary (m)

Clear space in front of the unit position (m)

Measuring from a photo gives an estimate. Use a tape for the final figure.

Clear space to the side (m)

Measuring from a photo gives an estimate. Use a tape for the final figure.

Manufacturer's minimum in front (m)

From the installation manual of the unit you plan to fit.

Manufacturer's minimum to the side (m)

Clearance check (if applicable; worked out automatically in the app)

Base, drainage for condensate and pipe route to the house

Are there neighbouring windows or gardens close to the unit position?

☐ Yes ☐ No

Distance to the nearest neighbouring door or window of a habitable room (m) (if applicable)

For the noise check under MCS 020(a), done by the installer. The form does not calculate noise levels.

Photos of the outdoor unit position (photos: attach, or note the file names)

Existing hot water cylinder size and location, if any

Space for a new cylinder

Main fuse rating (choose one)

☐ 60 A ☐ 63 A ☐ 80 A ☐ 100 A ☐ Not marked

Earthing arrangement (choose one)

☐ TN-C-S (PME) ☐ TN-S ☐ TT ☐ Not determined

Photos of the meter and consumer unit (photos: attach, or note the file names)

Walk Cam: heat pump survey walk-round

Walk Cam video walk-through: available in the SiteSurvey app only.

What the customer wants (comfort, running costs, timescale)

5. Actions and sign-off

Are further actions needed?

☐ Yes ☐ No

Further actions (copy this block for each one; if applicable)

What needs doing? *

Priority (choose one)

☐ Urgent ☐ High ☐ Medium ☐ Low

Who will do it?

Due date

Status (choose one)

☐ Open ☐ In progress ☐ Completed

Inspector name *

Position or company

Inspector signature

Signing records what was found on the day. It does not make unsafe equipment safe or replace a thorough examination, design check or service by a competent person.