

Retrofit Assessment Record

A whole-house retrofit assessment data record (PAS 2035 style): dwelling, construction, condition, ventilation, heating and hot water, existing measures, occupancy, defects to fix first and photos.

1. Dwelling

Project

Client

Site *

Site address

Assessment date *

Time

Retrofit assessor *

Assessor accreditation or membership number

For example the TrustMark-registered scheme or professional body membership.

Dwelling type (choose one)

- ☐ Detached
- ☐ Semi-detached
- ☐ Mid-terrace
- ☐ End-terrace
- ☐ Flat
- ☐ Maisonette
- ☐ Bungalow

Age (choose one)

- ☐ Before 1900
- ☐ 1900 to 1929
- ☐ 1930 to 1949
- ☐ 1950 to 1966
- ☐ 1967 to 1982
- ☐ 1983 to 2002
- ☐ 2003 or later

Listed building or conservation area?

- ☐ Yes ☐ No

PAS 2035:2023 says every domestic retrofit project is coordinated by a Retrofit Coordinator, and every dwelling is first assessed by a Retrofit Assessor. The assessment covers the construction and condition, defects, damp and mould, ventilation, heating and hot water, planning constraints and any measures already installed. This form records the site data for the assessment. It is not the assessment report or the energy assessment, and it does not by itself make a project PAS 2035 compliant.

This is a site data record that supports the PAS 2035 retrofit assessment and any RdSAP energy assessment or EPC. It is not the lodged assessment, the EPC or the Retrofit Coordinator's sign-off.

Walk Cam: retrofit assessment

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

2. Fabric and condition

Main walls (choose one)

- ☐ Solid brick
- ☐ Cavity, unfilled
- ☐ Cavity, filled
- ☐ Timber frame
- ☐ System build
- ☐ Stone

Loft insulation depth (mm)

Rule or tape in the insulation, or measure from a photo with an A4 sheet standing upright in it as the reference.

Ground floor (choose one)

- ☐ Suspended timber ☐ Solid ☐ Unknown

Glazing (choose one)

- ☐ Single ☐ Double before 2002 ☐ Double 2002 or later ☐ Triple ☐ Mixed

Wall areas by elevation (copy this block for each one)

Elevation * (choose one)

- ☐ Front ☐ Rear ☐ Left side ☐ Right side ☐ Rear extension ☐ Other

Wall type on this elevation (choose one)

- ☐ Solid brick
☐ Cavity, unfilled
☐ Cavity, filled
☐ Timber frame
☐ System build
☐ Stone
☐ Mixed

Width of the elevation (m)

Tape or laser along the base, or measure from a photo taken square on with the front door as the reference.

Height to the eaves (m)

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

Windows and doors on this elevation (copy this block for each one)

Window or door (for example W1, front door) *

Width (m)

Height (m)

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

This elevation: window and door area (m²) (worked out automatically in the app)

This elevation: net wall area (m²) (if applicable; worked out automatically in the app)

Photo of the elevation (photos: attach, or note the file names)

Gross wall area (m²) (worked out automatically in the app)

Window and door area (m²) (worked out automatically in the app)

Net wall area (m²) (worked out automatically in the app)

Windows and doors as a share of the wall area (%) (if applicable; worked out automatically in the app)

Defects to fix before retrofit (tick all that apply)

- ☐ Damp or mould
- ☐ Roof leaks
- ☐ Gutters or downpipes
- ☐ Cracked render or pointing
- ☐ High ground levels
- ☐ Blocked air bricks
- ☐ None found

If applicable: PAS 2035 asks for structural defects to be repaired and the causes of damp or water ingress to be dealt with before retrofit measures are installed.

Defects found (copy this block for each one; if applicable)

Defect * (choose one)

- ☐ Damp or mould
- ☐ Roof leaks
- ☐ Gutters or downpipes
- ☐ Cracked render or pointing
- ☐ High ground levels
- ☐ Blocked air bricks
- ☐ Other

Where

When to fix * (choose one)

- ☐ Before any measures ☐ Alongside the measures ☐ Monitor

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

Defects recorded (if applicable; worked out automatically in the app)

To fix before any measures (if applicable; worked out automatically in the app)

To fix alongside the measures (if applicable; worked out automatically in the app)

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

3. Ventilation, heating and occupancy

Ventilation * (tick all that apply)

- ☐ Trickle vents
- ☐ Kitchen extract
- ☐ Bathroom extract
- ☐ Continuous (dMEV)
- ☐ Positive input ventilation (PIV)
- ☐ MVHR
- ☐ None

Do the extract fans run and move air? (choose one)

- ☐ Yes ☐ No, or weak ☐ No fans fitted

Main heating (choose one)

- ☐ Gas boiler
- ☐ Oil boiler
- ☐ Electric storage
- ☐ Heat pump
- ☐ Solid fuel
- ☐ Other

Boiler make, model and age

Occupants

Occupancy and comfort notes (cold rooms, condensation, health)

Improvement options noted

Householder name

Householder signature

Completed by *

Signature