**City of Doncaster Council (CDC)**

**ECO FLEX CONTRACTOR INFORMATION**

**CUSTOMER ELIGABILITY**

All Installers working under the CDC Flex Statement of Intent must collect evidence to support the application and confirm via evidence sent to CDC:

* Customers’ Eligibility
* Residency

**Applications should be verified for qualification before sending to CDC**. Failure to send the application in the correct format, evidence required not supplied/incorrect could result in rejection and a charge for re submission at **£50. – This fee can be subject to change**

Residents will be required to complete the Customer Declaration with a relevant qualified assessor.

**CUSTOMER DECLARATIONS**

* **Must be signed using a wet signature, via stylus or e signature software.**
* **No copying and pasting of signatures is allowed as per Ofgem’s guidance.**
* **E Signatures are accepted providing it is via software that ensures customers have viewed both pages.**
* **Attach signature timeline evidence if available.**

**EVIDENCE REQUIRED**

**Ofgem States:** For all households identified as eligible through ECO4 Flex, evidence will need to be collected and retained by both the LA and the supplier. Ofgem will not be collecting this evidence but will be able to request it where issues arise with measures (eg mismatch between LA declaration or project notification) or during audits.

Suppliers must retain evidence for the duration of the scheme. Ofgem may conduct checks after the scheme closure date, so we recommend that suppliers have access to relevant information for three years after ECO4 ends (until 2029) as per the wider data retention in ECO4, in case they need to support the eligibility of a measure.

**CDC will randomly audit applications on a quarterly basis to help prevent fraud.**

**Examples of suitable evidence for each of the ECO4 referral routes, the list is non-exhaustive.**

**EPC certificate/EPR Report** must also be supplied to verify Household is in private tenure SAP band D, E, F or G. (E, F or G for Private Rented).

**Table 1**

|  |  |
| --- | --- |
| **Referral Route** | **Evidence** |
| Route 1: Low income | * **Evidence Requirements (Amended by Ofgem 1 April 2023)** * **CDC Require 3 months bank statements for all route one applications** * Most recent year's tax return / P60 documentation. If this was issued 6+ months from when the LA signs and issues the declaration, it may only be used in combination with additional evidence. If the householder has multiple jobs, then the householder will need to provide P60s for each job. Where additional income is being received that’s not visible on the P60, additional evidence must also be provided e.g. three bank statements from last 3 months from when the LA signs and issues the declaration. * Most recent year's annual income pension statement. Or if notified monthly, three from the last 3 months from when the LA signs and issues the declaration. * Three payslips **alongside bank statements** from the last 3 months from when the LA signs and issues the declaration, from all accounts receiving an income. * Evidence such as P45 from the last 3 months from when the LA signs and issues the declaration can be used in combination with other supporting evidence. * As route 1 is based on the whole household income, **provide confirmation of the number of adults residing at the address** via council tax letters / tenancy agreements / mortgage statements / electoral register / soft credit check. * **Bank Statements must show name and address and not doctored in any way** * **Bank Statements in correct page order** * **Household Income = All sources of income (Gross)**   **Including all benefits, also includes benefits in a child’s name. Anyone over 18 working and living in the same property such as lodgers and elderly relatives etc**   * **Contractors must complete the Income Form in word** * **Show Tax calculation for Pensions on the income form**   Any pension income over £12570 (personal allowance) is subject to 20% tax |
| Route 2: Proxy targeting | * **PROXY 1: LSOA 1-3** Screenshot from the LA confirming the household is within a LSOA area, supported by Office for NationalStatistics(ONS)data: <https://onsdigital.github.io/postcode-lookup/>.   **Contractor to identify eligibility - CDC will supply the screen shot along with the signed Declaration**   * **PROXY 2: Council Tax Rebate** (excludes Single Person Rebate)   Copy of council tax reduction eg a photo, an email, a PDF with name and address; or letter confirming reduction from LA.  **PROXY 3: Vulnerable to living in a cold home (Nice Guidelines)** Signed referral letter from a Doctor / GP identifying that a person living at the premises is considered to be vulnerable to the cold and suffers from a health condition as stated in the NICE guidance: NG6, excluding the low-income proxy. (recommended). **Letter Template is available**   * Or at least one of these non-exhaustive suggestions in written form, which may apply for other conditions/diseases etc in the NICE Guidelines (we recommend providing more for greater certainty):   + People with cardiovascular conditions: hospital diagnosis letters, social worker referrals, copy of repeat prescriptions for child with asthma, or copies of referral letters to certain groups that help people with these conditions.   + People with disabilities: PIP, DLA or Attendance Allowance award notices.   + Older people (65 and older): birth, marriage certificate, passport, copy of bus pass, or pension statement.   + Households with young children (5 or under): birth certificate, school enrolment letter, or passport.   + Pregnant women: MAT B1 form to prove the householder was pregnant when the LA signed and issued the declaration. * \***See Further Guidance Below on NICE Guidelines** * **PROXY 4: Receives free school meals**   Eligibility Checking Service (ECS), documentation showing eligibility for free school meals due to low-income provided by the Department for Education or from the school.   * **PROXY 5: Referral under LA run scheme** Signed letter from local coordinator / local authority that proves the household was eligible for a LA-run scheme. * **PROXY 6: Sustained debt on utility bills & mortgage payments**   Signed letter accompanied by proof of gas and electricity debt from the energy supplier or Citizen’s Advice, showing that the household has been referred to the LA for support with their energy bills.  **PROXY 7: PPM / non-PPM evidence (supplier provided data):**   * Customer tariff data to indicate the customer’s payment method   **\*\*See Further Guidance below** |

|  |  |
| --- | --- |
| Route 3:  NHS referrals | Official letter signed by either an NHS Trust, NHS Trust Board or NHS GP. This letter will need to state that the official signing the letter considers someone in the household to be suffering from one of the four health conditions listed below  The person’s severe or long term health condition must be due to :  • A cardiovascular condition,  • A respiratory disease,  • Limited mobility, or  • Immunosuppression.  The link to a generic letter template can be found on Ofgems website. **The template can be used for Route 2 Proxy 3 and Route 3** |
| Route 4: Bespoke  targeting | The evidence for this will be assessed as part of a ESNZ led panel  assessment. |

In recognition of doctor’s and GP’s time and effort, and to reduce their administrative burden, Ofgem have published a standard referral letter on their website that can be used for Route 2, proxy 3, and must be used for Route 3 unless the doctor / GP wants to use their own letter. For Route 2, proxy 6 they have published a standard referral letter for Citizen’s Advice. They have also published an installer verification letter so that surveyors can notify eligible households to the LA, and a household application form to allow eligible households to apply to their LA.

**\*Proxy 3 NICE Guidance Outline**

Many people can be vulnerable to the cold, for different reasons. This could be because of a medical condition like heart disease, because of a disability which means they are unable to move around to keep warm and makes them more likely to develop chest infections, or because of not being able to afford to keep warm. The term vulnerable therefore includes, but is not limited to, the following groups:

* + People with cardiovascular conditions
  + People with respiratory conditions (in particular, chronic obstructive pulmonary disease and childhood asthma)
  + People with mental health conditions
  + Disabled people
  + Older people (ages 65 and above)
  + Households with young children (from new-born to school age)
  + Pregnant women
* **Other conditions that could stop someone moving around the home or make them more likely to develop chest infections are:**
* Diabetes
* Musculoskeletal conditions (osteoarthritis, rheumatoid arthritis)
* Blood conditions (sickle cell anaemia)
* Neurological conditions (including dementia, Parkinson’s disease, multiple sclerosis, epilepsy)
* People with weakened immune systems

**If needed, please contact the Sustainability Unit for clarification regarding eligibility on health conditions.**

\*\***Proxy 7 Guidance:**

1. **Non-PPM customers:** These are customers who have been in debt for more than 13 weeks ending with the day on which the declaration is made, **and** are in a debt repayment plan with their energy supplier or repaying their fuel debt through 3rd party deductions.(Suppliers only)\*
2. **Pre Payment Meter customers:** Suppliers may also identify PPM households who:
   * have either self-disconnected or received supplier Discretionary/Friendly credit within the last 13 weeks ending with the day on which the declaration is made; or
   * are in a debt repayment plan with their energy supplier; or
   * repaying their fuel debt through 3rd party deductions.

**\*Please Note: Proxies 1 & 3 and proxies 6 & 7 cannot be used in combination with each other.**

It is mandatory for suppliers to use one type of customer debt-data (PPM or non-PPM data), in combination with one other proxy from Route 2 with the exceptions of the LA run scheme and utility bill support.

**SENDING APPLICATIONS – Pasport Portal**

**Applications must be sent before measures are carried out**

Please ensure you are using the up-to-date forms found on our website. These will also be available via passport once uploaded. <https://www.doncaster.gov.uk/services/housing/local-authority-flexible-eligibility-statement-of-intent>

**FORMS/EVIDENCE REQUIRED**

**ROUTE ONE:**

1. **CUSTOMER DECLARATION –** Please name as eg 1 Church St Customer Declaration
2. **EPC/EPR RATING EVIDENCE –** Please name as eg 1 Church St EPC
3. **HOUSEHOLD INCOME FORM -** Please name as eg 1 Church St Income Form **(must be in word)**
4. **PROOF OF RESIDENCY – Council Tax Bill is preferred.** If this is not available, please attach another form of evidence. You can also attach extra evidence to support the application E.g. Energy bill, land registry, rental agreement mortgage statement, deeds etc. **One piece of evidence is accepted in order to upload your application.**
5. **PROOF OF ID – Any form of photo ID e.g. passport or driving licence.** If customer does not possess any form of photo ID please attach other evidence you deem suitable.

**One piece of evidence is accepted in order to upload your application.**

1. **INCOME EVIDENCE – Upload evidence required such as P60’s Wage slips, Benefit letters etc as per Table one above –** Minimum of one is needed in order to upload your application, please upload other evidence if you have this to support the application.

For working age residents Three payslips **alongside bank statements** from the last 3 months from when the LA signs and issues the declaration, from all accounts receiving income.

Scan and name each piece of evidence separately and name as per the example below

**Bank Statements must have separate files for each month and in correct page order.**

**Name documents as per the example below:**

**1 Church St Bank Statement Nov**

**1 Church St P60**

Only payslips can be scanned together **for 3 months for example 1 church St payslips Oct to Dec**

**\*\*Please Do Not mix evidence in the same file such as bank statements and payslips they need to Separate and clearly named**

**ROUTE TWO: Currently not Available on Pasport. Please email us if you have a Route 2 application**

**ROUTE THREE:**

**NHS referral letter must be submitted via the portal along with the email chain from GP/Healthcare Professional.**

1. **CUSTOMER DECLARATION –** Please name as e.g. 1 Church St Customer Declaration
2. **EPC/EPR RATING EVIDENCE –** Please name as e.g. 1 Church St EPC
3. **NHS EMAIL CHAIN –** Please name as e.g. 1 Church st NHS Email chain
4. **NHS Referral letter –** Please name as e.g. 1 Church st NHS Letter
5. **PROOF OF RESIDENCY – Council Tax Bill is preferred.** If this is not available, please attach another form of evidence. You can also attach extra evidence to support the application E.g. Energy bill, land registry, rental agreement, mortgage statement, deeds etc. **One piece of evidence is accepted in order to upload your application.**
6. **PROOF OF ID – Any form of photo ID, passport or driving licence.** If customer does not possess any form of photo ID please attach other suitable evidence you deem suitable. **One piece of evidence is accepted in order to upload your application.**

**Please name all documents as per the above guidance**

**CUSTOMER CARE**

Please ensure you are working to Ofgem’s most recent guidance for consumer protection -Sec 13

[**ECO4 and GBIS Flex Local Authority Guidance**](https://eu-west-1.protection.sophos.com?d=ofgem.gov.uk&u=aHR0cHM6Ly93d3cub2ZnZW0uZ292LnVrL3NpdGVzL2RlZmF1bHQvZmlsZXMvMjAyNS0wNC9HQklTJTIwJTI2JTIwRUNPNCUyMExvY2FsJTIwQXV0aG9yaXR5JTIwQWRtaW5pc3RyYXRpb24lMjBHdWlkYW5jZSUyMHYyLjEucGRm&p=m&i=NWViZTk5ZjMwYjY1MTQxNzUyMDgyZmI4&t=cFBzUlRKU2EvYVptcnpVWGc1WWxlMVl4SVpzWFFBVXE3U0lRSG1PSDV3QT0=&h=7e36fcc8fcc7448dabd05dd7458a1d6c&s=AVNPUEhUT0NFTkNSWVBUSVY7COfpA3FVERd6L_SI04LKiVCSVZUk8B6nY7Rsap0tqA)

Adequate paperwork should be left with the customer which clearly shows your company name and contact details, including a contract which is signed by the customer. This should include an ***‘itemised description of the work that will be carried out, including a breakdown of costs and total price’. Sec 13.24***

**MARKETING**

We ask that your sales staff or surveyors do not make reference to Doncaster Council when evidencing your company’s credentials. The Council does not endorse contractors unless we have a contractual agreement. Please only reference the Council’s involvement as enabling more residents to qualify through a more flexible qualifying criteria.

We spend a lot of time talking to customers who state we’ve sent a contractor out to survey their property or that we’re working **with** a contractor. If a customer calls to state they’ve been told this by one of your surveyors or sales staff, we will correct them and it usually results in a lost sale for the company. So please do make it clear to those representing you to be well rehearsed in the true source of funding and what the offer is, as well as what the role of the Council is. That said, if the customer is just verifying you as legitimate, we will be able to confirm you have a bona fide funding agreement in place.

**MARKETING MATERIAL**

All material must give consistent information both about ECO4 as well as clear details of the installing company which should include clear contact details both by phone and web page of the company. A fully up and running web page should always be accessible giving clear information about the scheme and the company. Any changes to both phone number and web pages should be updated on the leaflet before it is used to prevent out of date information being given to residents. Information about what is on offer should be clear and what the resident can expect from the scheme.

**No reference should be made to this being a totally free scheme but subject to survey there may be a fee, this should be clearly stated, not in the small print.**

**All ECO-4 flex advertising literature used by approved installers should first be seen and approved by CDC. Including material used by Lead Generators.**

**Any installer found to be repeatedly using sales tactics that CDC deem to be immoral/misleading can have its declarations and work through ECO-4 flex in Doncaster stopped by CDC.**

**FEES**

All contractors will be charged a **£75 fee** for each application made. The fee will be applied to each property and you will be invoiced periodically by the Council.

The fee is for all applications that have been processed and will still be charged if the application is cancelled for any reason. **Please note this fee is subject to change, contractors will be notified.**

**RE-SUBMISSION CHARGE**

Failure to send the application in the correct format, evidence required not supplied/incorrect could result in rejection and a charge for re submission at **£50.**

The fee covers some of the cost of administering the LA Flex scheme. This includes handling customer enquiries resulting from your sales visits, checking, correcting and approving your applications along with the auditing. The fee will still not cover the cost of administering the scheme but will at least make a contribution. **Please note this fee is subject to change, contractors will be notified.**

**PASPORT MESSAGE SYSTEM**

**Pasport has a two-way messaging system for CDC and Contractors. This system allows CDC to contact you if we have any issues or questions relating to a particular application.**

**If a document is not suitable for any reason we can reject via the system. The system will generate an auto message that enables you to upload a replacement.**

**For any other enquires/issues please use the Secure Sophos service – information below:**

**SECURE MESSAGING**

Sophos Encryption Service is used to send/receive secure emails.

We will send an encrypted email to your nominated contact for them to register and create a password.

**Please keep the password safe as this is needed for all emails.**

Please use the encrypted email we send to reply to when you need to send an email - N**o need to password protect documents as the email is secure.**

Please do not remove the **[encrypt]** in the subject on the email.

Please insert your subject reason/property address after [encrypt] in the subject box

Abobe Acrobat is needed to use the encryption service