

Assess+ for EPC Quick Start Guide

1. Login

- **Credentials:** Use your existing **Smart Survey** username and password.

2. Initial Setup

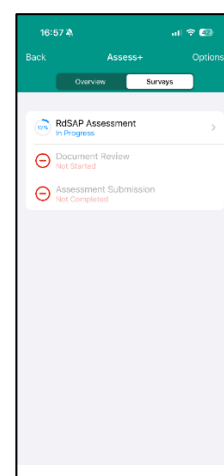
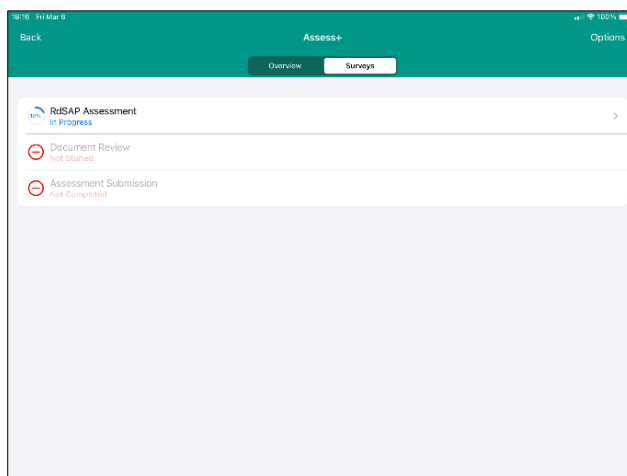
- **Download Updates:** You must download **Survey Definition Updates** before you can begin.
- **Missed the pop-up?** Go to **Settings > Survey Definitions** to manually trigger the update.

3. Start a New Assessment

- **iPad:** Tap **New Job** (top-right).
- **iPhone:** Tap the **+** icon (top-right).
- **Select EPC:** Choose your account and search for the property address.
 - *Note:* (England, Wales and N. Ireland only) If the address isn't found, tap **Skip** to enter it manually. Ensure spelling is 100% accurate as this appears on the final EPC.

4. Recording Data

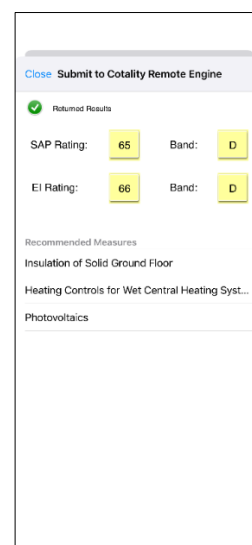
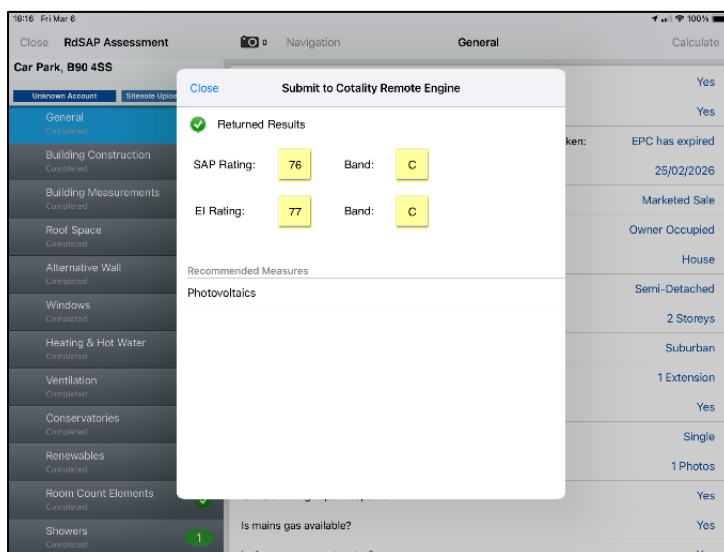
- **Navigation:** From the **Overview** page, tap **Survey > RdSAP Assessment**.



- **Capture:** Begin recording data and taking photos within the assessment screens.
- **Editing:** To change account or address details, go to **Options > Property Details**.

5. Calculation & Submission

- **Calculate:**
 - **iPad:** Tap **Calculate** (top-right).
 - **iPhone:** Tap the **three dots (⋮)** > **Calculate**.

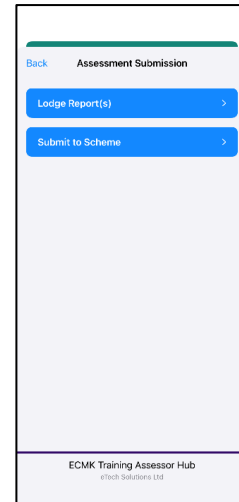
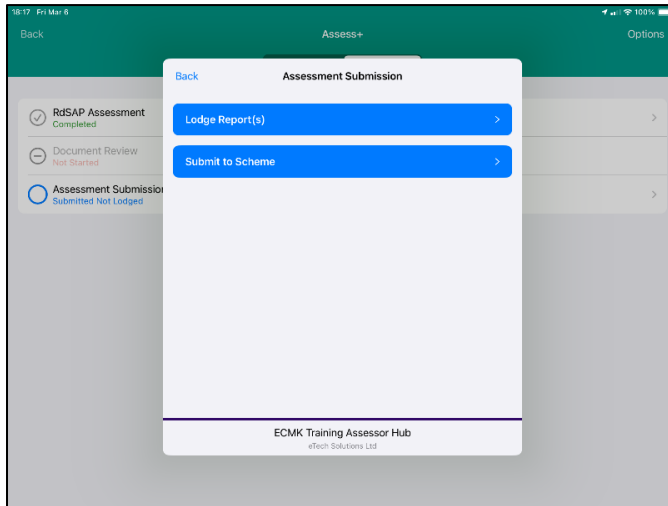


- **Once Calculated:** Close the calculation pop-up, then tap **Close** (top-left) to return to the **Surveys** screen.
- **Submit:** Tap **Assessment Submission** and wait for the data upload to finish.

6. Finalising the Job

Choose one of the two options presented:

- **Lodge Report(s):** Officially lodges the EPC on the Register and uploads notes to **Assessor Hub**.
- **Submit to Scheme:** Uploads site notes to **Assessor Hub** only (no lodging).



Important:

The assessment will **not** appear on the Assessor Hub until you press one of the two buttons above

For further advice call **0333 123 1418** or email support@ecmk.co.uk

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