



HEC Procedures Check List

Name of Client

Address

Post Code

Tel No. Client No

Action	Done	Comment
Contact Client and send letter to confirm visit		
Date of 1 st Visit		
Data Collection Form prepared		
Confirm 1 st visit 24 h before		
Following 1 st visit any queries to Jon / David Howard or Mike Bourke		
Date of 2 nd Visit		
Carry out analysis		
Complete 2 copies of Form C – Results & Recommendations, one for client, one for surveyors records and try to get agreement to 12 month follow up		
Attend 2 nd visit		
Supply if appropriate the following:		
Contractors List & Disclaimer Form		
Any other appropriate Information Sheet		
If required loan Energy Monitor and arrange for return after approx 1 month		
Encourage Client to display appropriate window stickers , and leave them with Membership leaflet , Tip Tips and Water saving sheet. Also Home Energy Check card to give to a neighbour.		
Destroy Data Form B and keep Results Form C for one year if return visit requested.		
Pass any request for referral to contractor to MIKE HYMAS		
Follow-up thank you letter and Satisfaction Survey sent after approx 1 month. Include S.A.E. for return to Mayfair		
Any other follow up required.		

