

Digital Pen & Paper Case Study...

...Streamlining Domestic Energy Assessment



FACTS

Customer: LMS Survey and Valuations Ltd¹ (LMS S&V) specialises in property surveying services and in 2007 responded to the UK Government's requirement for energy surveys on house sales, launching a national team of 200 Domestic Energy Assessors (DEAs).

Challenge: To provide technology for DEAs that is easy to use in the field, is reliable, simplifies data collection and processing, speeds up response times, improves data quality and provides a full audit history.

Solution: A FAS enterprise strength digital pen and form solution using mobile data transmission, incorporating Scribbleweb, Digital Field Solutions' unique forms management portal, seamlessly integrated with Northgate Information Solutions' energy calculation engine and work management system.

Benefits: A faster, more efficient, more productive and higher quality domestic energy assessment service.

Energy Performance Certificates

In August 2007, the UK Government introduced the requirement that every home put on the market with four or more bedrooms must have a Home Information Pack (HIP). The HIP includes an Energy Performance Certificate and documents such as a sale statement, searches and evidence of title.

This was just the first stage of HIPs and in September the requirement was broadened to homes with three or more bedrooms. This is expected to extend to include all homes in the very near future.

The Energy Performance Certificates (EPCs) included in the Home Information Packs provide A-G ratings (like fridges) on the energy efficiency of a home, plus advice on how to make further energy savings. The production of an EPC requires a home visit and assessment by an accredited energy surveyor known as a Domestic Energy Assessor or DEA.

When all homes are included within the HIP regime, it is expected that over 1.5 million domestic EPCs will be completed each year by a national network of some 8,000 qualified DEAs

Competitive Advantage

When Paul Staley, Managing Director of LMS S&V, decided to create a market leading team of DEAs, he recognised that choosing the right technology would enable him to provide a better service at a lower cost - and give his business a competitive advantage.

According to Paul; "Having evaluated a range of alternative technologies, we felt that the simplicity and convenience of the digital pen and paper would work best for collecting the large amount of data required to complete an energy assessment.

The digital pen is easy to use and the system automatically converts handwriting to data so that it can interact directly with Northgate's energy calculation engine. Another key advantage is that the system retains a faithful electronic copy of the site notes and sketches which is essential for audit and quality control."

- For more information about our digital pen & form solutions, please contact Tim Howard on 07734 597464 or email solutions@digitalfieldsolutions.com
- To find out about the services provided by LMS Survey and Valuations Ltd, please contact Joanna Diamond-Jones on 07815 876426 / 0151 350 6056 or email joanna.diamond-jones@LMS-SVA.COM
- To find out more about Northgate Information Solutions' EPC solutions, please call 0870 808 1234 or email marketing@northgate-is.com

An Integrated Solution

To complete an EPC the DEA fills out a four page data form with their digital pen, providing information on construction, heating and floor areas. Continuation sheets, which automatically link to the main data form, are provided for additional notes and sketches.

Once completed, the DEA simply ticks each form to send via their mobile phone. Any missing data is instantly flagged on the phone as part of the send process. This avoids the DEA leaving site without all the necessary information.

When all the required data is present, the system automatically interacts with Northgate's energy calculation engine and sends back the energy ratings to the DEAs mobile for verification.

To complete the certification process, each DEA logs on to the Northgate EPC Portal at the end of the day. This allows them to simply and efficiently view the submitted forms, review and edit the data, add recommendations and publish each energy certificate.

Once an EPC is produced, all site note images and data are stored centrally for future reference and audit.

Benefits of the Digital Pen

According to Paul Staley, "The digital pen and form solution delivered by Digital Field Solutions has been very positively received across the business"

The solution provides a number of key benefits:

- **Convenience** - the digital pen and paper solution is very portable and easy to use in a site environment.
- **Quality** - instant feedback during the send process ensures that all required data is collected before leaving site. The instant energy rating response also means that DEAs can complete a sense check before leaving.
- **Efficiency** - the integrated system eliminates data re-keying and avoids the need for scanning or filing of site notes.
- **Audit** - the instant availability of site notes on the system has proven to be extremely useful for handling customer queries, reviewing quality and discussing technical issues with DEAs whilst they are still on site.

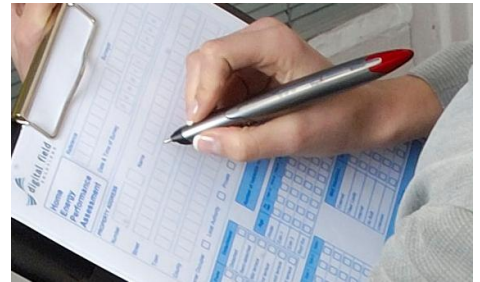
"The digital pen and form solution delivered by Digital Field Solutions has helped us create an extremely efficient business model. Our DEAs love the digital pen - it is simple to use, convenient, reliable and makes their job so much easier."

Paul Staley, Managing Director, LMS Survey & Valuations Ltd



Digital Pen Technology

What Is It? An electronic pen, that looks and works just like an ordinary ballpoint, but captures handwriting and drawings from paper forms and notes.



The pen works together with normal paper overprinted with a dot pattern, capturing the pen strokes with a tiny camera. Data captured is uploaded by PC docking or mobile phone.

The system provides the user with an exact image of the handwriting and form and can also translate the handwriting to text which can then be used in the back office.

It is low cost, simple to use, reliable and, if used with a mobile phone, can send data back from field to the office in an instant.

Solutions can be developed and deployed quickly. Training requirements are low as form completion is a familiar and natural process.

We use the Forms Automation System (FAS), an Enterprise Class digital pen & paper application, to build client solutions. Being specifically designed for the business environment, it is robust, reliable, secure and offers unique advantages for corporate users:

- **Unique pattern** - each page has a unique dot pattern increasing security and traceability
- **Laser printing** - forms can be printed on demand as required
- **Pre-population** - printed forms can be pre-populated with back office data, reducing data entry and increasing data quality.

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