# Scoping Plan Approval Form

Project-Based Activities – Measurement and Verification

Version 2.5 – 26 August 2025

As an accredited person (AP), you must have scoping plan approval and a project plan must have been submitted to us, the Essential Services Commission, to be eligible to begin work on a project designed to create Victorian energy efficiency certificates (VEECs) under the standard measurement and verification (M&V) method of the Victorian Energy Upgrade (VEU) program’s project-based activities (PBA). You are required to submit either a project plan, or a SMM and advanced M&V project plan declaration choosing not to submit a M&V plan, to begin work on a project designed to create VEECs under the advanced M&V method, or any of the five specified measurement methods (SMM).

Applicants should refer to the **Measurement and Verification Activity Guide** for assistance in completing this form and information about the different methods available for M&V activities. These documents and all other related guides and forms can be found at the commission website at [www.esc.vic.gov.au/m-and-v](http://www.esc.vic.gov.au/m-and-v)

Applications for scoping plan approval are made via the VEU Registry at <https://veu.esc.vic.gov.au/>

To lodge an application for project plan approval, you must also have, or be applying for, scoping plan approval. You can lodge scoping and project plan applications together or separately. The scoping plan must be approved first. **Project plan approval is only required for standard M&V projects.**

To lodge an application for scoping plan approval, you must first have an active VEU account on the VEU Registry and be accredited and approved by us to undertake the PBA M&V method – standard M&V, advanced M&V and/or SMM.

Visit <https://veu.esc.vic.gov.au/s/registration> to open a new account. Information about becoming accredited can be found in the Application Guide for Accredited Persons, found at [www.esc.vic.gov.au/become-veu-accredited](http://www.esc.vic.gov.au/become-veu-accredited)

To lodge your application for scoping plan approval, you must:

1. answer all relevant questions on this form
2. prepare all relevant supporting documentation referenced in this form
3. upload this form and the supporting documentation in the ‘Scoping plan attachments’ section on the Scoping plan page of your PBA measurement and verification project application in the VEU Registry
4. fill out all other required fields on the Scoping plan page and submit to the commission.

We may require further information and/or require an inspection of the project premises before granting or refusing scoping plan approval. The latest information on current processing times for scoping plan applications can be found at [www.esc.vic.gov.au/pba](http://www.esc.vic.gov.au/pba). We will notify you of our decision in writing as soon as practicable after it has been made.

Participation in PBA M&V projects will require the publication of some project details on the VEU Registry. Projects with approved project plans, or impact reports where a project plan is not required, will be listed on the [Register of Approved Projects](https://veu.esc.vic.gov.au/vpr/s/pbaprojectplans). The register will contain the project name, the AP, the location, the methods used to abate greenhouse gases, and any other information that the commission consider appropriate.

If you have concerns about sharing information that you consider are commercial in confidence, you should discuss these with us before lodging a project plan or impact report where applicable.

1. Applicant details

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| Applicant details |
| **Q1**. VEU account name: | Click here to enter text. |
| **Q2**. Name of accredited person (AP): | Click here to enter text. |
| **Q3**. AP’s address: | Click here to enter text. |
| **Q4**. Name of primary contact: | Click here to enter text. | **Q5**. Job title: | Click here to enter text. |
| **Q6**. Email: | Click here to enter text. | **Q7**. Phone number: | Click here to enter text. |
| **Q8**. What are the normal commercial/business activities at the project site(s)? | Click here to enter text. |  |
| **Legal right** |
| **Q9**. Has the energy consumer provided a recent energy retailer document which identifies the energy consumer? | Choose an item. |
| *Attach site energy document. Note this can be a document such as an energy bill (with energy consumption data blanked out) or an official letter from the energy retailer. The document must identify the energy consumer and the site address.*  |
| **Attached energy retailer document file name:** | Click here to enter text. |  |
| **Q10**. Is the AP also the energy consumer? | Choose an item. |
| *If* ***no****, attach completed* ***Registration of Interest Form*** *to demonstrate that the energy consumer is aware of the project and agrees to progress the application. A Registration of Interest Form must be completed for each individual energy consumer.*  |
| **Attached Registration of Interest Form file name:** | Click here to enter text. |  |
| **Q11**. Is the energy consumer also the site owner? | Choose an item. |
| *If* ***no****, attach a document explaining the relationship between the site owner, energy consumer and any other entity involved in each site. For example, explain the site owner, site lease holder and site operator relationship, if these are different entities.* |
| **Attached site ownership structure file name:** | Click here to enter text. |  |

1. Project

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| Project background |
| **Q12**. What is the project name? | Click here to enter text. |
| *The name must be unique, suitable and not misleading about the project’s ownership, scope or purpose and follow the convention of [company name]\_[site]\_[project purpose]\_[start date] e.g. PackagingCompany\_Moorabbin\_Boiler Upgrade\_Dec 2017* |
| **Q13**. For multi-site projects, explain the similarity of premises and upgrade, including:* The service(s) affected (must be consistent for each premises)
* the energy sources affected (must be consistent for each premises)
 | Click here to enter text.  |
| **Q14**. Will the project be undertaken at a business or non-residential premises? | Choose an item. |
| **Q15**. Will the project be undertaken at a building classified under part A3 of the Building Code as Class 2 or 3 (this includes but may not be limited to apartment buildings, hotels, motels, hostels, backpacker and student accommodation)?  | Choose an item. |
| *If* ***yes****, does the project relate to common building services, and not services which are supplied exclusively to a sole-occupancy dwelling (such as a room or unit)?* | Choose an item. |
| **Q16**. Please confirm that the upgrade will take place on a completed building.  | [ ]  |
| **Q17**. Is the project on a site(s) that is on the register of scheduled activity premises (SAP)? | Choose an item. |
| **Project details** |
| **Q18**. When will project modifications/construction commence (indicative only)?If this is a multi-site project, this is the earliest commencement date. | DD/MM/YY |
| **Q19**. What are the main activities that will be undertaken as part of the project? | Provide an overview of the main activity that will be undertaken as part of the project. |
| **Q20**. What site service(s) will be affected by the project? | Provide a **list** of the site service(s) affected by the upgrade e.g. steam production, lighting, HVAC, pumps etc. |
| **Q21**. What energy consuming equipment will be **installed**, if any? | List and describe the energy consuming equipment that will be installed as part of the project. |
| **Q22**. What energy consuming equipment will be **removed**, if any? | List and describe the energy consuming equipment that will be removed as part of the project. |
| **Q23**. What energy consuming equipment will be **modified**, if any?  | Provide a description of the modifications that will be made to the way an existing energy consuming equipment is used as part of the project. |
| **Q24**. Provide details of **other** products installed or removed that will affect any energy consuming equipment on site. | Describe the products that will be installed or removed to affect the energy consumption of an energy consuming product as part of the project. |
| **Q25**. Describe any other techniques that aren’t covered by **questions 19-24** which will be used that affect the energy consumption of the project site? | If other techniques will be used to affect energy consumption of the site, describe them.  |
| **Q26**. How will the project activities described in **questions 19-25** result in energy savings and/or abatement? | Explain how the project activities described in questions 19-26 will result in abatement. |
| **Q27**. What further planning and development approvals are needed from government and regulatory bodies? (*Optional – these details can be supplied with the project plan application if not yet known.)* | Provide a **list** of the types of approvals needed, and the name of the approving body. |
| **Q28**. Is lighting equipment to be installed or removed as part of the project? | Choose an item. |
| *If* ***yes****, which lighting products are proposed to be installed?* *Please note this can be indicative only at the scoping plan stage.* |
| **VEU Activity** | **Brand** | **Model** |
| Choose an item. | Click here to enter text. | Click here to enter text. |
| Choose an item. | Click here to enter text. | Click here to enter text. |
| Choose an item. | Click here to enter text. | Click here to enter text. |
| Choose an item. | Click here to enter text. | Click here to enter text. |
| *If you need more space, please attach a separate document to list the products.* |
| **Attached lighting product list file name:**  | Click here to enter text. |  |
| If **yes**, provide details of any changes to the use or installation of lighting control devices (such as occupancy sensors, daylight linked controls, etc.), and any changes to lighting design or use as a result of this project? | Click here to enter text. |
| If **yes**, provide a list of zones and lights being installed and replaced (including wattages and any sensors). | Click here to enter text. |
| **Q29** Has a site layout diagram been attached? | Choose an item. |
| *Attach site layout diagram which clearly shows the project locations and meter locations/arrangements for all project activities within the site, and a process flow diagram, if applicable. Please note these can be simple hand drawn explanations of the project; detailed engineering drawings are not required at the scoping stage.* |
| **Attached site layout file name(s):** | Click here to enter text. |  |
| **Q30**. What project design, scoping, meter installation, asset installation, asset modification and/or project construction work has already started? | Provide a ***statement*** of 100 words or less that describes what project design, scoping, meter installation, asset installation, asset modification and/or project construction work has already been done as part of the project. |
| **Energy** |
| **Q31**. What current energy sources will be affected? Please tick the boxes below as appropriate (as many as applicable). |
| Electricity |[ ]  Liquefied petroleum gas (LPG) |[ ]
| Natural gas |[ ]  Renewable energy |[ ]
| Other energy sources affected (please provide details) | Click here to enter text. |
| **Q32**. What documentation and/or calculations will be needed to establish the pre-project energy use, and how will you obtain this information? | Click here to enter text. |
| **Q33**. Does the project involve fuel switching to non-renewable fuels including fossil fuels, waste from fossil fuel sources, or wood from native forests (other than wood waste from a native forest which is a waste product from the construction of buildings or furniture, including timber off-cuts and timber from demolished buildings)? | Choose an item. |
| **Q34**. Will the project introduce new energy sources that were **not previously at the site**? What new energy sources will be introduced? Please tick the boxes below as appropriate (as many as applicable). Note: A project adding solar PV to a site that has existing solar PV onsite is considered to be introducing a new renewable energy source. |
| Electricity |[ ]  Liquefied petroleum gas (LPG) |[ ]
| Natural gas |[ ]   Renewable energy |[ ]
| Other energy sources introduced (please provide details) | Click here to enter text. |
| **Q35**. Does the site have any existing electricity generation equipment (for example, solar PV)? If **yes**, answer the following questions: | Click here to enter text. |
| Which site address(es) have the electricity generation equipment? | Click here to enter text. |
| What is the electrical generation capacity of the electricity generation equipment (in kW)?  | Click here to enter text. |
| Does the existing electricity supplier agreement have an export cap? Provide details. | Click here to enter text. |
| **Greenhouse gas emissions** |
| **Q36**. Identify the method(s) intended to be used to calculate the reduction in greenhouse gases (depending on the project you may need to select a combination): |  |
| Forward projection of savings using a baseline energy model and operating energy model |[ ]
| Annual reporting of savings using a baseline energy model and measured energy consumption |[ ]
| Forward projection of savings followed by annual reporting of savings |[ ]
| **Q37**. Detail the project’s participation in other greenhouse gas abatement schemes/energy efficiency schemes/emissions reduction schemes. | Click here to enter text. |
| **Project type** |
| **Q38**. You must nominate a project type from the following options in **bold**:* **Standard M&V** – traditional, or regular M&V
* **Advanced M&V** – reduced reporting requirements (advanced PBA accreditation required)
* Specified measurement methods (SMM) – streamlined methods for particular upgrades
	+ **SMM 1:** Weather normalised whole of site electricity measurement (option C)
	+ **SMM 2:** Weather normalised whole of site gas measurement (option C)
	+ **SMM 3:** Retrofit isolation (option B) for non-seasonal motors and rotating equipment
	+ **SMM 4:** Direct measurement of solar PV
	+ **SMM 5:** Electrification direct measurement

Please see the Measurement and Verification Activity Guide for more information on these project types. While it may be possible to change project type via a variation application, please ensure you have fully considered the requirements of each project type as they relate to your proposed upgrades before making your selection. |
| Choose the project type according to the methods outlined above: | Choose an item. |
| **Additional information** |
| **Q39.** Is there any additional information you wish to provide about this project? (optional) | Provide any further information not covered in the previous questions that you want considered as part of your scoping plan approval. For example - the length of measurement periods, or metering to be used. This is particularly important for SMM and advanced M&V methods where project plan approval is not required. |

1. Documents to be supplied

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| Application format |
| **Q40**. Have you provided the information required in this form in another format (for example, your own template scoping plan)? **You must still submit this form with Section 4 and 5 completed.** | Choose an item. |
| *If* ***yes****, have you had this format approved by the commission?* | Choose an item. |
| **Project name:** | Click here to enter text. |  |
| **Document file name:** | Click here to enter text. |  |
| **Please note:** scoping plan applications will only be accepted if provided in this application form, unless you have prior approval from the commission. Please contact us via veu@esc.vic.gov.au to discuss your proposed template. |
| **Insurance** |
| **Q41**. Will this project be carried out at your own site?  | Choose an item. |
| *If* ***yes****, please attach a signed* Insurance Waiver Declaration *available at* [*www.esc.vic.gov.au/m-and-v*](http://www.esc.vic.gov.au/m-and-v) |
| **Document file name:** | Click here to enter text.  |
| If**no***,* confirm that you have and will maintain appropriate levels of insurance while participating in this project*.* | [ ]  |

1. Undertakings

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| Applicant’s undertakings in relation to scoping plan approval |
| **Q42.** I undertake that if any new lighting equipment is to be installed in carrying out the activity, that equipment will be listed on the VEU Register of Products maintained by the commission at the time of certificate creation in respect of that activity. |[ ]
| **Q43.** I undertake that if any lighting equipment is removed in carrying out the activity it will be decommissioned. |[ ]
| **Q44.** I undertake that the project is not undertaken to comply with energy efficiency or greenhouse gas emissions requirements in any minimum standard or mandatory requirement under any legislation. |[ ]

1. Declaration

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| Declaration |
| **Q45**. I certify that all of the above details are correct at the time of completing this form and that I am authorised to act on behalf of the VEU account listed in Section 1 of this document in matters relating to the *Victorian Energy Efficiency Target Act 2007*.I have read and understood the information and requirements set out in **Measurement and Verification Activity Guide**.I consent to the provision of the following information owned by my organisation to the Department of Energy, Environment, and Climate Action (DEECA), the administrators of other greenhouse gas abatement schemes/energy efficiency schemes/emissions reduction schemes (such as the Emissions Reduction Fund (ERF) and the Renewable Energy Target (RET)), and other state or commonwealth government departments and agencies as stated in s66 of the *Victorian Energy Efficiency Target Act 2007*:* information which may include confidential and commercially sensitive information relating to activities undertaken or proposed to be undertaken once accredited under the VEU program.
* information to determine if VEU projects are already claiming benefits under these other prescribed schemes.

I declare that I am aware that a project is eligible to create VEECs if it:* reduces greenhouse gas emissions while maintaining current service levels and/or production capacity
* reduces greenhouse gas emissions and if service levels are reduced to correct over-servicing.

I declare that I am aware that a project is not eligible to create VEECs if:* it reduces greenhouse gas emissions by reducing current service or production levels
* it participates in other greenhouse gas abatement schemes/energy efficiency schemes/ emissions reduction schemes.

If lighting equipment is to be removed or installed as part of the project, I declare that the current (baseline) lighting equipment has been in place for at least six months.I declare that I am aware that the commission may not grant a scoping approval and the project may therefore be ineligible to create VEECs if the following work has commenced at the premises:* installing or modify an asset, other than a meter
* commencing project construction work.

I acknowledge that:* I must assess all relevant risks pertaining to this project and have appropriate safe work methods and other systems in place to manage those risks. I acknowledge that all projects must be undertaken in accordance with the laws, regulations and codes of practice applicable to that activity.
* In order to obtain full project approval, any required information that I have not provided in the scoping plan application must be included in the subsequent project plan application (standard M&V projects only).
* Penalties may be applied for providing misleading information under Section 68 of the *Victorian Energy Efficiency Target Act 2007*.

I have updated the commission of any changes to answers and information provided in any previously supplied forms as part of this project, or accreditation application to undertake PBA activities, that have occurred since those forms were approved.I will update the commission of any changes to answers and information provided in the PBA accreditation application process within 28 days of the change occurring. |
| Click here to enter text.……………………………………Name |  | ………………………………………Signature |  | DD/MM/YY……………………..Date |
| Click here to enter text.……………………………………Name (witness) |  | ………………………………………Signature |  | DD/MM/YY……………………..Date |