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Produce and explain Energy Performance Certificates relating to domestic property



Overview

This standard covers the activities undertaken once the inspection is completed i.e. the production and communication of a complete and comprehensive Energy Performance Certificate in accordance with the prescribed format. The Energy Performance Certificate will detail the property's overall performance ratings and its predicted fuel costs based on standard occupancy, the current performance of each element of the property (e.g. walls, heating, lighting) and recommended measures to improve the property's energy performance.

Note that the term 'assessment' is used throughout the standards when referring to the overall process of determining the energy performance of a property, whereas 'inspection' is used only when referring to on-site inspection of the property features.

You are required to collate all the information you have obtained on the property and use approved software to determine energy performance ratings and to generate energy efficiency measures to improve the property's energy performance. You must ensure that data has been inputted correctly and check that the energy efficiency measures generated are appropriate for and tailored to the property.

You must use approved software to produce and lodge the completed Energy Performance Certificate and inform the customer that the Energy Performance Certificate is available. You are required to clearly explain the Energy Performance Certificate's content to your customer, including any differences compared to previous Energy Performance Certificates and respond appropriately to any requests for clarification on aspects of the Energy Performance Certificate or its associated energy efficiency measures. You must also maintain your own internal records in accordance with good practice and statutory requirements, including the auditing requirements of your Accreditation scheme. You should strive to provide high standards of customer service in all customer interactions, including issuing the Energy Performance Certificate to them and explaining its contents.

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Performance criteria

You must be able to:

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- P1 assemble and collate information from your on-site inspection and from other relevant and reliable sources
- P2 use approved software correctly to determine energy performance ratings ensuring that data is entered accurately
- P3 obtain sufficient information to ensure values entered for all components are accurate
- P4 identify areas of potential uncertainty or insufficient information which could affect value attribution and carry out checks to avoid common misattributions when inputting data
- P5 identify **critical property features** where incorrect choice of values will be significantly detrimental to accuracy and take appropriate steps to correctly represent these features to arrive at an accurate assessment of the property
- P6 before inputting an item as 'unknown', carry out sufficient investigations to minimise the use of default values
- P7 use approved software to generate **energy efficiency measures** for the property
- P8 take account of the interaction between the building fabric and the services in the building when considering **energy efficiency measures**
- P9 check the **energy efficiency measures** generated and delete any that are inappropriate, in accordance with conventions and providing your reasons
- P10 prepare an Energy Performance Certificate that meets relevant codes of practice and standards, including the accurate recording of the date prepared and relevant property address
- P11 check the data is complete before finalising the Energy Performance Certificate and check it to ensure it is clear and complete
- P12 recognise a result that is clearly incorrect for the property in question

Issue Energy Performance Certificates and explain their contents

You must be able to:

- P13 provide a set of **energy efficiency measures** tailored to the fabric and location of the building and taking account of available fuel supplies and current conventions
- P14 collate **relevant information** as evidence to support the specific decisions made on values and **energy efficiency measures** considered
- P15 maintain records of which **energy efficiency measures** were considered and rejected with reasons
- P16 keep accurate and traceable records of investigations carried out, values attributed and options considered

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- P17 lodge Energy Performance Certificates on the prescribed national databank on completion
- P18 inform the customer that the Energy Performance Certificate has been completed and is available to them
- P19 explain all the **component parts** of the Energy Performance Certificate and their implications and signpost customers to sources of additional information and support
- P20 explain variations between ratings and energy efficiency measures produced by different versions of the calculation methodology and between assessment undertaken using the different methodologies for new and existing homes
- P21 explain to customers the limitations of the approved software for both ratings and energy efficiency measures
- P22 explain to customers that predicted savings from energy efficiency measures are based on standard occupancy and may not be achieved in practice
- P23 inform customers that the data collected during the inspection is recorded on the prescribed database and the circumstances where it may be accessed by others
- P24 respond to queries about the Energy Performance Certificate and provide clarification of the contents when required
- P25 refer individuals to relevant sources of information and advice where you are unable to respond to their queries
- P26 provide a high standard of customer service in all dealings with your customer including issuing and explaining their Energy Performance Certificate
- P27 inform your customer that you have a complaints procedure and advise them how to access it
- P28 maintain internal records which are clear, complete and conform to accepted professional and statutory requirements

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Knowledge and understanding

You need to know and understand:

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- K1 the implications for energy efficiency of building pathology and morphology and their implications for energy assessment and recommended action; the special considerations that apply to buildings of traditional construction
- K2 the relationship between the building fabric, building location and building services and their impact on energy assessment process and **energy efficiency measures**
- K3 ways of ensuring that the information gathered leads to realistic and practical **energy efficiency measures**
- K4 the necessary quality assurance checks to conduct on own information gathering to ensure values are correct and **energy efficiency measures** are realistic
- K5 how to identify problematic or unknown factors which could affect value attribution
- K6 how to gather more information to avoid use of default values
- K7 the **critical property features** where incorrect choice of values will be significantly detrimental to accuracy
- K8 the prescribed format and content of an Energy Performance Certificate; the differences in the Energy Performance Certificate format used in England/Wales and in the Devolved Administrations; and the role of each component in the documentation
- K9 the Conventions used in Reduced Data SAP (RDSAP) energy assessment and the implications for results when these change
- K10 the role of Government's Scheme Operational Requirements on Accreditation Bodies, or equivalents in the Devolved Administrations and how they must be followed to ensure the accuracy of entries and quality of **energy efficiency measures**
- K11 special factors to take into account for listed buildings and other heritage factors
- K12 ways to minimise the impact of measures in conservation areas and listed buildings to address likely concerns of Conservation Officers, or equivalents in the Devolved Administrations
- K13 the range of **energy efficiency measures** to improve the energy performance of property that may be included within an Energy Performance Certificate
- K14 the software used to produce Energy Performance Certificates and how to use it correctly
- K15 the principles underpinning the approved software used to calculate energy ratings
- K16 how to input data using the approved software in order to determine energy performance ratings

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- K17 how to use approved software to generate **energy efficiency measures** for measures to improve the energy performance of property
- K18 the circumstances in which items can be recorded as 'unknown'
- K19 the importance of checking that data has been inputted correctly and how to review data if the calculation will not process or appears incorrect
- K20 the importance of checking the **energy efficiency measures** generated, deleting any that are inappropriate and providing your reasons
- K21 the way in which **energy efficiency measures** are generated and circumstances when it is appropriate to delete them
- K22 the importance of using plain language and appropriate terms where free text is allowed and of complying with Data Protection
- K23 the importance of checking the Energy Performance Certificate to ensure it is clear and complete

Issue Energy Performance Certificates and explain their contents

You need to know and understand:

- K24 how to establish the customer's understanding of the Energy Performance Certification process and their expectations as to outcomes
- K25 the components and outcomes of the energy assessment process and likely customer queries about them
- K26 the approved software used for the production and lodgement of completed Energy Performance Certificates
- K27 how to use the information technology underpinning the national register for lodgement and retrieval of Energy Performance Certificates and how to provide necessary audit evidence via electronic transfer
- K28 the importance of informing the customer when the Energy Performance Certificate is available
- K29 how to interpret the ratings and energy efficiency measures provided in the Energy Performance Certificate
- K30 how to explain all the component parts of the Energy Performance Certificate and their implications clearly to the customer
- K31 the limitations of the approved software and their implications for both ratings and energy efficiency measures
- K32 the circumstances where the data recorded on the prescribed database may be accessed by others
- K33 how to respond to queries regarding the Energy Performance Certificate and provide clarification of the contents
- K34 the limitations on answers to queries which it is appropriate to provide to customers
- K35 the sources of further information and advice to which people could be referred
- K36 the role of the Energy Performance Certificate within Green Deal (or equivalent programme)

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- K37 how customers can express an interest in the Green Deal (or equivalent programme) and the first steps in the process
- K38 **how to provide a high standard of customer service in all dealings with your customer**
- K39 the necessary features of a complaints procedure and how customers may access your own complaints procedure
- K40 the reasons for, and methods for, maintaining your own internal records in a clear, complete and acceptable manner
- K41 the minimum period of time for which you must retain records
- K42 how to draw the customer's attention to any energy efficiency measures specifically excluded by the assessor if requested to by the customer
- K43 the terminology used on the Energy Performance Certificate, paying attention to differences between the precise meaning of the terms and their commonly used meaning if requested to by the customer
- K44 how to advise customers about ways to minimise the impact of measures in conservation areas and or listed buildings, to address likely concerns of Conservation Officers

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Additional Information

Scope/range

- 1 **critical property features**
 - 1.1 rooms in the roof
 - 1.2 retrofitted insulation
 - 1.3 unseparated conservatory
 - 1.4 extensions
 - 1.5 wall construction
 - 1.6 primary, secondary and portable heating
 - 1.7 inadequate heating
 - 1.8 age of main property and of any extensions or roof rooms
 - 1.9 low and zero carbon technologies
 - 1.10 any other features that when incorrectly identified will have a significant detrimental affect to rating accuracy

- 2 **energy efficiency measures**
 - 2.1 all energy performance improvements listed at Appendix T of SAP2009, or its successor
 - 2.2 any other improvements that may be supported by Government policy or that of the Devolved Administrations, as listed in relevant legislation or guidance

- 3 **relevant information**
 - 3.1 legible site notes
 - 3.2 clear site sketches (plan, elevation) to give an adequate record of the inspection for audit purposes
 - 3.3 clear photographs containing mandated data (e.g. time and date) appropriately staged and annotated where necessary
 - 3.4 legibly completed survey forms
 - 3.5 records of web searches or other research
 - 3.6 any other information you consider necessary to support your decisions
 - 3.7 any other information required by Scheme Operating Requirements

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4 component parts

- 4.1 the estimated fuel costs and headline savings messages
- 4.2 the energy efficiency ratings (current and potential)
- 4.3 top actions
- 4.4 the current features table
- 4.5 low and zero carbon sources
- 4.6 the Renewable Heat Incentive (RHI) information and data for RHI deeming
- 4.7 energy efficiency measures: main recommendations table
- 4.8 energy efficiency measures: the further measures
- 4.9 choosing a package
- 4.10 the Environmental Impact rating
- 4.11 details of any Green Deal Plan, where applicable

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Suite Domestic Energy Assessors

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