

ASTNDEA4

Prepare and explain home energy audit reports



Overview

This Unit covers preparing and issuing Home Energy Audit Reports, and helping clients to understand the ratings and recommendations contained therein.

Element 4.1 requires that you collate all the information you have obtained on the property, and use prescribed technology to determine energy ratings and to generate recommendations for measures to reduce consumption. You must ensure that data has been inputted correctly, and check that the recommendations generated are appropriate.

Element 4.2 requires that you use the prescribed technology to produce and file the completed Home Energy Audit Reports, issue them to clients, and respond appropriately to any requests for clarification on aspects of the Report. You must also maintain your own internal records in accordance with good practice and statutory requirements.

The recommendations provided to clients must be objective and impartial e.g. roof insulation is required, energy efficient light bulbs should be used, a condensing boiler should be installed. However, it is possible that you will be 'tied' to a particular organisation/employer and that you will receive referral fees or other benefits from them should the client use their services. Although you may make suggestions to clients that they use particular products, services or suppliers (e.g. a certain make of boiler, or a local insulation installation service), it is vital that any interest is fully disclosed to the client.

ASTNDEA4

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Performance criteria

Prepare Home Energy Audit Reports

- You must be able to:*
- P1 assemble and collate information gathered before, during and after your site visit
 - P2 use prescribed technology correctly to determine energy ratings
 - P3 use prescribed technology to generate recommendations for measures to reduce energy consumption
 - P4 check the recommendations generated and delete any that are inappropriate providing your reasons
 - P5 prepare **Home Energy Audit Reports** that meets relevant codes of practice and standards
 - P6 fully disclose, within **Home Energy Audit Reports**, any referral fees or other benefits that you may receive should the client follow your suggestions for particular products, services and/or suppliers

Issue and explain Home Energy Audit Reports

- You must be able to:*
- P7 lodge Home Energy Reports on a prescribed national databank on completion if and where appropriate
 - P8 issue Home Energy Audit Reports to clients promptly
 - P9 explain the ratings and recommendations included within Home Energy Audit Reports, and their implications, clearly to clients
 - P10 respond to queries about Home Energy Audit Reports and provide clarification of the contents when required
 - P11 refer clients to relevant sources of information and advice where you are unable to respond to their queries
 - P12 maintain internal records which are clear, complete and conform to accepted professional and statutory requirements

ASTNDEA4

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Knowledge and understanding

You need to know and understand:

Prepare Home Energy Audit Reports

- K1 the prescribed format and content of a Home Energy Audit Report
- K2 the range of measures to reduce energy consumption that may be included within a Home Energy Audit Report
- K3 the technology used to produce Home Energy Audit Reports and how to use it correctly
- K4 the principles underpinning the prescribed technology used to calculate energy ratings
- K5 how to input data using the prescribed technology in order to determine energy ratings
- K6 how to use prescribed technology to generate recommendations for measures to reduce energy consumption
- K7 the circumstances in which items can be recorded as 'not known'
- K8 the importance of checking that data has been inputted correctly and how to review data if the calculation will not process
- K9 the importance of checking the recommendations generated, deleting any that are inappropriate, and providing your reasons
- K10 the way in which recommendations are generated and circumstances when it is appropriate to delete them
- K11 the importance of using plain language, and appropriate terms where free text is allowed
- K12 the importance of checking the Home Energy Audit Report to ensure it is clear and complete
- K13 the importance of fully disclosing any referral fees or other benefits you may receive as a result of the client following your suggestions for particular products, services and/or suppliers

Issue and explain Home Energy Audit Reports

You need to know and understand:

- K14 the prescribed technology for the production and lodgement of completed Home Energy Audit Reports where appropriate
- K15 the importance of issuing Home Energy Audit Reports promptly to clients
- K16 how to explain ratings, recommendations and their implications clearly to clients
- K17 how to respond to queries regarding Home Energy Audit Reports and provide clarification of the contents
- K18 the sources of further information and advice to which people could be referred
- K19 the reasons for, and methods for, maintaining your own internal records in a clear, complete and acceptable manner
- K20 the minimum period of time for which you must retain records

ASTNDEA4

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Additional Information

Scope/range

Prepare Home Energy Audit Reports

- 1 Home Energy Audit Reports containing:
 - 1.1 an overview of current energy consumption of the property and its occupants
 - 1.2 recommendations for reducing energy consumption, including potential costs and carbon/cost savings
 - 1.3 a prioritised action plan
 - 1.4 agreed follow-up action/support

ASTNDEA4

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Suite Non Domestic Energy Advisors

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