

Overview

This standard covers preparing and issuing Home Energy Audit Reports and helping customers to understand the ratings and recommendations contained in the reports.

The standard is about collating all the information obtained on the property, using prescribed technology to determine energy ratings and to generate recommendations for measures to reduce energy consumption.

It is about using the prescribed technology to produce and store the completed Home Energy Audit Reports, issuing them to customers, explaining the reports to them, and responding to any requests for clarification on aspects of the reports. It is also about maintaining internal records in accordance with the relevant data protection legislation.

You must understand and work to the requirements of each devolved nation.

Performance criteria

You must be able to: **Prepare Home Energy Audit Reports**

1. assemble and collate information gathered before, during and after a site visit
2. use the approved technology for Home Energy Audit Reports to determine energy performance ratings, confirming that data is entered to the required standards
3. use the approved technology for Home Energy Audit Reports to determine recommendations for measures to reduce energy consumption
4. prepare a Home Energy Audit Report that meets the relevant devolved nation's codes of practice and standards
5. check the data is complete before finalising the Home Energy Audit Report
6. disclose, within Home Energy Audit Reports, the referral fees or other benefits that you may receive should the customer follow suggestions for particular products, services and/or suppliers

Issue and explain Home Energy Audit Reports

1. lodge Home Energy Audit Reports on the relevant devolved nation's register on completion
2. issue Home Energy Audit Reports to customers within the relevant devolved nation's agreed timescales
3. explain the ratings and recommendations included within Home Energy Audit Reports, and their implications, to customers
4. answer queries from customers about Home Energy Audit Reports and provide clarification of the contents when required
5. refer customers to relevant sources of information and advice where unable to respond to their queries
6. maintain internal records in accordance with devolved nation's requirements and the relevant data protection legislation

Knowledge and understanding

You need to know and understand: **Prepare Home Energy Audit Reports**

1. the relevant devolved nation's format and content for Home Energy Audit Reports
2. the range of measures to reduce energy consumption to be included within a Home Energy Audit Report
3. the approved technology used for each devolved nation to produce Home Energy Audit Reports and how to use it
4. the principles underpinning the prescribed technology used to calculate energy consumption ratings
5. how to input data, following developer's instructions, using the relevant devolved nation's approved technology for Home Energy Audit Reports to determine energy consumption ratings
6. how to use the approved technology to generate recommendations for measures to reduce energy consumption
7. the circumstances in which items can be recorded as 'unknown'
8. the importance of checking that data has been inputted to the relevant standards and how to review data if the calculation will not process
9. the way in which recommendations are generated and circumstances when it is appropriate to delete them
10. the importance of checking the Home Energy Audit Report to confirm that it meets the relevant devolved nation's codes of practice and standards
11. the importance of disclosing the referral fees or other benefits
12. the importance of disclosing the referral fees or other benefits you may receive as a result of customers following your suggestions for particular products, services or suppliers

Issue and explain Home Energy Audit Reports

1. the approved devolved nations' technology for the production and lodgement of Home Energy Audit Reports
2. the importance of issuing Home Energy Audit Reports to customers within the relevant devolved nation's agreed timescales
3. how to explain ratings, recommendations and their implications to customers
4. how to respond to queries regarding Home Energy Audit Reports

- and provide clarification of the contents
5. the sources of further information and advice to which customers should be referred
 6. the reasons and methods for maintaining your internal records in accordance with devolved nation's requirements and the relevant data protection legislation
 7. the minimum period of time for which records must be retained

Scope/range

Prepare Home Energy Audit Reports

Home Energy Audit Reports containing:

- an overview of current energy consumption of the property and its occupants
- recommendations for reducing energy consumption, including potential costs and carbon/cost savings
- a prioritised action plan
- agreed follow-up action/support

Prepare and explain Home Energy Audit Reports

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