

Overview

This standard is for Domestic Energy Assessors (DEAs) preparing for energy assessments of domestic property. This is a legal requirement in all four nations.

It is about responding to requests for energy assessments from customers, clarifying their requirements and checking that the property is eligible for an energy assessment. You must explain the terms and conditions, any limitations or constraints that apply to energy assessments and confirm your fee and payment arrangements. You are expected to confirm the procedures for assessment with customers and to acknowledge special circumstances that apply to your site visit including access to the property (or parts of the property) or who will be present at the time of the inspection.

This standard is about investigating matters which enable you to provide an Energy Performance Certificate within the terms of your engagement. You should identify and research available information, for example, the property type and construction, tenure, services to the property, modifications/extensions and constraints that affect the potential for improving the energy performance of the property. You must also identify factors that influence the conduct of the assessment e.g. health and safety issues or additional information that should be gathered during the on-site inspection. In some cases, your investigations may reveal problems that prevent you from undertaking an assessment of the energy performance of the domestic property; you are expected to inform the customers and explain the reasons to them.

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 and its features.

You will be required to know and understand the relevant requirements of each devolved nation.

Performance criteria

You must be able to: **Agree and confirm instructions to undertake energy assessments**

1. respond to requests to undertake energy assessments from prospective domestic property customers and prepare for the assessments
2. establish contact with customers and verify and confirm their requirements
3. explain to the customer that an Energy Performance Certificate is a legally required document in applicable circumstances, that its form and content is prescribed, and it includes cost-effective energy recommendations
4. explain to the customer the terms and conditions under which you will undertake an energy assessment including the requirement to take photographs and record evidence for audit purposes
5. explain to the customer the limitations and constraints of the planned energy assessment and the relevant associated legislation and direct the customer towards the approved methodology where the use of the Reduced Data Standard Assessment Procedure (RDSAP) methodology is not appropriate
6. write to the customer to confirm the instruction and the terms, conditions and arrangements that have been agreed
7. confirm with the customer or occupiers the date and time of the onsite inspection
8. confirm the requirements of the energy assessment with the customer or other occupiers
9. identify circumstances that will prevent you from undertaking an energy assessment and explain the reasons to the customer
10. where relevant, explain to the customer the basic principles of domestic energy assessments and the role of the Energy Performance Certificate in relevant nation's energy efficiency programme
11. where necessary, explain to the customer that ratings and recommendations may differ from past assessments due to changes to the required methodology

Investigate relevant matters relating to the property and energy usage

1. investigate and record the required information to produce an Energy Performance Certificate

2. evaluate relevant information to identify the factors that impact on the conduct of the energy assessment
3. assess, if required, that the property falls within the scope of energy assessment legislation
4. inform the customer within the agreed timescales in cases where your investigations identify issues that prevent you from assessing the energy performance of the property
5. confirm that the most up-to-date version of the approved software and associated reference materials can be accessed and used

Knowledge and understanding

You need to know and understand: **Agree and confirm instructions to undertake energy assessments**

1. the relevant legislation related to domestic property energy assessments and Energy Performance Certificates for England, Scotland, Wales and Northern Ireland
2. the relevant regulations and guidance under that legislation relating to the role of Domestic Energy Assessors and the undertaking of energy assessments for domestic properties
3. the types of domestic property and situations that do not by law require an Energy Performance Certificate
4. the basic principles of domestic energy assessments and the role of the Energy Performance Certificate in the relevant nation's energy efficiency programme
5. the limitations and constraints that apply to the conduct of energy assessments and to the relevant nation's required methodology
6. the alternatives to the prescribed methodology for existing homes and the requirements of Reduced Data Standard Assessment Procedure (RDSAP)
7. the alternative assessment methodology options available for the customer
8. the importance of confirming in writing the arrangements agreed between you and the customer
9. the fee structures and payment agreements for energy assessments
10. how to confirm on-site inspection arrangements with the customer or occupier
11. the importance of confirming the requirements of the energy assessment with the customer or occupiers
12. how to identify and explain circumstances that prevent you from undertaking an energy assessment
13. how to explain that ratings and recommendations may differ from past assessments due to changes to the required methodology

Investigate relevant matters relating to the property and energy usage

1. the types of domestic property to which energy assessment legislation does not apply

2. the different types of information required to produce an Energy Performance Certificate
3. the different sources of information relating to the energy performance of the property that can be investigated
4. the relevant geographical and environmental features that affect the energy performance of the property
5. how to evaluate relevant information to identify the factors that impact on the conduct of the energy assessment how to identify circumstances that prevent you from assessing the energy performance of the property
6. the importance of ensuring that you have access to the most up-to-date version of the Reduced Data Standard Assessment Procedure (RDSAP) software and associated reference materials

Scope/range

Respond:

- face to face
- in writing
- by telephone

Specific arrangements:

- access to the property
- those present at the property at the time of on-site inspection
- health and safety issues

Circumstances:

- properties beyond own current level of competence
- your own diary pressures
- difficulties in gaining access
- conflicts of interest

Information:

- concerning the age or construction of the property which may assist the energy assessment process
- concerning the installed building services (e.g. gas safety certificates)
- concerning any energy efficiency measures (original and retrofitted)

Significant factors:

- concerns about information (e.g. missing, incomplete, out of date, inaccurate)
- health and safety considerations relevant to the energy performance of property (e.g. potentially unsafe access to roof space or presence of asbestos cladding)

Prepare for energy assessments of domestic property

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