

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.

Performance criteria

You must be able to: Produce Energy Performance Certificates

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

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

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

Knowledge and understanding

You need to know and understand: Produce Energy Performance Certificates

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

K17 how to use approved software to generate energy efficiency measures for measures to improve the energy performance of property 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

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)

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 measures specifically excluded by the assessor if requested to by the customer

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

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

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

ASTDEA5

Produce and explain Energy Performance Certificates relating to domestic property



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