

Overview

This standard covers the activities undertaken once the domestic property inspection is completed with the production and communication of an Energy Performance Certificate in accordance with the prescribed format. The Energy Performance Certificate details the property's overall performance ratings and its forecasted 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.

The standard is about collating all the information you have obtained on the property, using approved software to determine energy performance ratings and generating energy efficiency measures to improve the property's energy performance. You must confirm that data has been inputted in accordance with the relevant requirements and check that the energy efficiency measures generated are relevant for the property.

You must also 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 explain the Energy Performance Certificate's content to your customer, including any differences compared to previous Energy Performance Certificates and respond to 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 the relevant statutory requirements and data protection legislation, including the auditing requirements of your Accreditation scheme.

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

Performance criteria

You must be able to: **Produce Energy Performance Certificates**

1. assemble and collate information from the on-site inspection and from relevant additional sources
2. use the approved Energy Performance Certificate software, following the developer's instructions, to determine energy performance ratings confirming that data is entered to the required standards
3. obtain the required information to confirm that the values entered for all components meet the required Energy Performance Certificate standards
4. identify critical property features where the incorrect choice of values will be affect the accuracy of the Energy Performance Certificate and take steps to represent these features to make a valid assessment of the property
5. before inputting an item as 'unknown', undertake investigations to minimise the use of default values
6. use the approved Energy Performance Certificate software to generate energy efficiency measures for the property
7. take account of the interaction between the building fabric and the services in the building when evaluating energy efficiency measures
8. prepare an Energy Performance Certificate that meets the relevant devolved nation's codes of practice and standards, including the recording of the date prepared and relevant property address
9. check the data is complete before finalising the Energy Performance Certificate

Issue Energy Performance Certificates and explain their contents

1. provide a set of energy efficiency measures tailored to the fabric and location of the building and taking account of available fuel supplies
2. collate relevant information as evidence to support the decisions made on values and the considered energy efficiency measures
3. lodge Energy Performance Certificates on the relevant national register on completion
4. inform the customer that the Energy Performance Certificate has been completed and is available to them

5. explain all the component parts of the Energy Performance Certificate and signpost customers to sources of additional information and support
6. explain to customers that predicted savings from energy efficiency measures are based on standard occupancy and may not be achieved in practice
7. inform customers that the data collected during the inspection is recorded on the relevant national register and the circumstances where it may be accessed by relevant organisations including researchers, local authorities and environmental organisations on a restricted basis
8. answer queries from customers about the Energy Performance Certificate and provide clarification of the contents when required
9. inform the customer that there is an Energy Performance Certificate complaints procedure and advise them how to access it
10. 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: **Produce Energy Performance Certificates**

1. how to establish the customer's understanding of the Energy Performance Certification process and their expectations as to outcomes
2. the relationship between the building fabric, building location and building services and their impact on energy assessment process and energy efficiency measures
3. the critical property features where the incorrect choice of values will affect the accuracy of the Energy Performance Certificate
4. the relevant devolved nation's format and content of an Energy Performance Certificate
5. the relevant devolved nation's conventions used in Reduced Data Standard Assessment Procedure (RDSAP) energy assessment and the implications for results when these change
6. the role of the devolved nations' Scheme Operating Requirements for Accreditation Bodies
7. the types of factors to take into account for listed buildings and conservation areas
8. the range of energy efficiency measures to improve the energy performance of property to be included within an Energy Performance Certificate
9. the relevant devolved nation's Energy Performance Certificate software used to produce Energy Performance Certificates and how to use it
10. how to input data, following developer's instructions, using the relevant devolved nation's approved Energy Performance Certificate software in order to determine energy performance ratings
11. the circumstances in which items can be recorded as 'unknown'
12. the importance of complying with the relevant data protection legislation
13. the importance of checking the Energy Performance Certificate to confirm that it meets the relevant devolved nation's codes of practice and standards

Issue Energy Performance Certificates and explain their contents

1. the components and outcomes of the energy assessment process and typical customer queries about them
2. the relevant devolved nation's approved software for the production and lodgement of completed Energy Performance Certificates
3. how to use the information technology underpinning the relevant devolved nation's register for lodgement and retrieval of Energy Performance Certificates
4. how to provide the required audit evidence via electronic transfer to be recorded in the relevant devolved nation's register
5. the importance of informing the customer when the Energy Performance Certificate is available
6. how to interpret the ratings and energy efficiency measures provided in the Energy Performance Certificate for the customer
7. how to explain the component parts of the Energy Performance Certificate and their implications to the customer
8. the circumstances where the data recorded on the prescribed database may be accessed by researchers, local authorities and environmental organisations on a restricted basis
9. how to respond to queries from the customer regarding the Energy Performance Certificate and provide clarification of the contents
10. the sources of further information and advice to which customers should be referred
11. how customers can access the relevant devolved nation's Energy Performance Certificate complaints procedure
12. the reasons and methods for maintaining your internal records in accordance with devolved nation's requirements and the relevant data protection legislation the minimum period for which records must be retained
13. how to advise customers about the ways to minimise the impact of measures in conservation areas and or listed buildings

Scope/range

Critical property features:

- rooms in the roof
- retrofitted insulation
- unseparated conservatory
- extensions
- wall construction
- primary, secondary and portable heating
- inadequate heating
- age of main property and of any extensions or roof rooms
- low and zero carbon technologies
- any other features that when incorrectly identified will have a significant detrimental effect on rating accuracy

Energy efficiency measures:

- any improvements that may be supported by Government policy or that of the Devolved Administrations, as listed in relevant legislation or guidance

Relevant information:

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

Component parts:

- the estimated fuel costs and headline savings messages
- the energy efficiency ratings (current and potential)
- top actions
- the current features table
- low and zero carbon sources
- the Renewable Heat Incentive (RHI) information and data for RHI deeming

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- energy efficiency measures: main recommendations table
 - energy efficiency measures: the further measures
 - choosing a package
 - the Environmental Impact rating

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Produce and explain Energy Performance Certificates relating to domestic property



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Relevant Occupations Professional Occupations; Construction, planning and the built environment; Building and construction; Architects; Town Planners and Surveyors

Suite Domestic Energy Assessors National Occupational Standards

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