

## Overview

This standard is about undertaking inspections of property to estimate their energy performance and make recommendations for improvement. The inspection aims to gather data and information, in accordance with the relevant calculation methodology, to enable the production of an Energy Performance Certificate and associated recommendations.

The standard includes conducting a visual inspection of the property, taking measurements and notes, and identifying factors that affect the property's energy performance.

The role of an energy assessor is to make observations and put these observations into a relevant national calculation methodology that then displays the results at the end.

The standard also requires that you maintain records of your findings. You must record information using relevant methods in accordance with the relevant Accreditation Scheme for the required period of time and provide evidence to support your decisions on the values recorded and energy efficiency measures made.

Note that the term 'assessment' is used throughout the standards to refer to the overall process of completing the inspection and entering the information into the relevant national calculation methodology, via the Government Approved software interfaces, whereas 'inspection' is used only for on-site inspection of the property and its features.

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

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### Performance criteria

#### *You must be able to:*

Inspect the property to establish the estimated energy performance

1. confirm the availability of the equipment and resources required for the energy performance inspection
2. use the relevant equipment, resources and software to interpret the available data to the required devolved nation's standards
3. provide evidence of your identity to those present at the property before commencing the inspection
4. when at the property, identify circumstances that may prevent continuing with the inspection and explain the reasons to the customers
5. undertake a visual inspection of the relevant aspects of the property in accordance with the requirements of the relevant national calculation methodology and its associated guidance and conventions
6. identify and record the critical property features
7. identify and record any heritage protection relating to the building
8. observe and record the measurements which are required to provide data for the calculation within the software
9. obtain the required additional documentary evidence about the property, to confirm the items that cannot be confirmed through the visual inspection
10. record items as 'unknown' or 'as built', where evidence cannot be obtained
11. make further investigations in accordance with the requirements of the national calculation methodology, where observations are inconsistent with existing evidence and expected findings
12. follow the relevant devolved nation's procedures for collecting information to enable the energy efficiency of the property to be estimated
13. refer customers to independent expert advice on matters beyond your competence level and role as an energy assessor

Maintain records of inspection findings

1. produce and maintain records of findings, including investigations carried out, values recorded, and options considered, to the level of detail required in accordance with the relevant national calculation methodology and its associated guidance and conventions
2. provide justification of the decisions made on values chosen, including relevant

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information as evidence to support this

3. create, maintain and supply when requested by the devolved nations, records of justifications where measures identified by the software were rejected
4. record evidence where and why inspection has not been possible or the data is recorded as 'unknown'
5. store records securely in accordance with the relevant statutory requirements and data protection legislation, including code of practice and the auditing requirements of your Accreditation Scheme
6. confirm that records can be accessed for future use when required
7. co-operate with requests for inspection records in relation to monitoring or investigation by the relevant Accrediting Body, or equivalent in the devolved nations
8. co-operate with relevant Accrediting Body, or equivalent in the devolved nations where corrections are needed to a certificate
9. identify potential health, safety and security risks with the property and the environment
10. prepare to take action to minimise or mitigate risks

## Knowledge and understanding

### *You need to know and understand:*

1. the range of potential impacts of climate change on buildings

Inspect the property to establish the estimated energy performance

1. the equipment, resources and software required for the inspection and how to use them
2. the factors that may affect the choice of energy efficiency measures for the property in the relevant national calculation methodology
3. the detailed inspection requirements and conventions that apply to the property as defined by the relevant national calculation methodology and its associated guidance and conventions
4. the consequences of recording an item as 'unknown' or 'as built' on the outcomes of estimated energy performance and recommendations
5. the defaults used in the relevant national calculation methodology and how these may impact on the outcome of the energy inspection and the subsequent EPC
6. in what circumstances calculated or in-situ U-values would be beneficial and the issues to be aware of, including the documentary evidence required
7. how to identify and record critical property features
8. how to conduct the inspection in accordance with the relevant devolved nation's requirements
9. how to observe and take measurements which meet the required standards
10. how to make further investigations where observations are inconsistent with existing evidence, and how to identify the causes of these inconsistencies
11. the requirements and application of relevant building regulations and other technical standards
12. the importance of keeping records in accordance with the relevant statutory requirements and data protection legislation, including code of practice and the auditing requirements of your Accreditation Scheme
13. the types of advice regarding energy efficiency that can be provided to customers during inspection that are within your competence and role as an energy assessor
14. the sources of information and advice about energy performance to which customers can be referred
15. the sources of information and advice about older and traditional buildings and heritage protection to which customers can be referred

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16. the types of construction of older and traditional buildings and the materials used, including local and regional variations.

17. the performance characteristics of older and traditional buildings compared to those of modern construction.

### Maintain records of inspection findings

1. the range of methods, formats and conventions for recording information and evidence on the property and its energy performance

2. how to record the information and evidence in accordance with the relevant statutory requirements and data protection legislation, including code of practice and the auditing requirements of your Accreditation Scheme

3. the required range of information and evidence relating to the property and its energy performance as defined by the relevant national calculation methodology and its associated guidance and conventions

4. the level of detail required by your relevant national calculation methodology to produce an Energy Performance Certificate (EPC)

5. why and how you are required to record the reasons why a complete inspection has not been possible

6. the circumstances in which records can include the fact that information is 'unknown' and the evidence required to support this

7. how and why to keep records in accordance with the relevant national calculation methodology

8. the relevant health and safety legislation and guidance

9. how to identify, respond to and report any potential health, safety and security risks with the property and the environment

10. the actions taken to minimise or mitigate risks

## Scope/range

### Circumstances:

- situations/occupants upon which it would be inappropriate to proceed with assessment
- the discovery of unexpected or hazardous conditions or materials
- other potential threats to health and safety
- property unsuitable for assessment with the relevant national calculation methodology

### Critical property features:

- type and age of dwelling
- dimensions and extent of dwelling
- extensions
- alternative walls, sheltered walls, party walls
- rooms in the roof
- wall, roof and floor construction
- ventilation and air tightness
- retrofitted insulation
- unseparated conservatory
- areas and types of windows and doors
- habitable rooms
- space heating (main and secondary)
- water heating (including solar water heating and heat recovery systems)
- lighting
- photovoltaics, wind turbines and small-scale hydro
- energy storage (electric batteries and thermal stores)
- electricity tariffs and metering types

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- any other features that, when incorrectly identified, will have a significant detrimental effect on assessment accuracy

Factors that may make energy efficiency measures unsuitable for the property:

- listed building status, or a property is in a conservation area
- interactions between building fabric and building services
- property situation, e.g. subject to extreme weather, flood risk or high level of exposure
- property condition
- inadequate ventilation
- inadequate insulation e.g. impact on heat pump recommendations
- traditional construction
- system-built property
- any other features of the property, or its site/location, which might adversely affect the performance of the recommended improvement, or the building's performance after improvement

Energy efficiency measures:

- energy performance improvements listed in the relevant national calculation methodology
- any other improvements that may be supported by UK Government policy or that of the Devolved Administrations, as listed in relevant legislation or guidance
- How to keep records in accordance with relevant national calculation methodology:
- a complete and comprehensive Energy Performance Certificate
- justify decisions on values recorded and energy efficiency measures recorded

Relevant information and documentary evidence to record:

- legible site notes
- clear site sketches (plan, elevation) to give an accurate records of the inspection for audit purposes, including measurements and calculations

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- clear photographs containing mandated data (e.g. time and date) appropriately staged and annotated, where necessary
- legibly completed survey forms (handwritten and digital)
- records of web searches or other research
- any other information considered necessary to support decisions
- any other information required by Scheme Operating Requirements

## Glossary

### Accreditation Body

Accreditation bodies for Domestic Energy Assessors (DEAs) in the UK are government-approved organisations that verify the competence of professionals to produce valid Energy Performance Certificates (EPCs). They provide necessary training, software, and quality assurance auditing.

### Building Services

These are the essential systems—heating, ventilation, lighting, plumbing, and security—that make buildings functional, safe, and comfortable. These technical components include MEP (mechanical, electrical, and plumbing) systems, fire safety, and energy management, designed to improve efficiency and occupant experience.

### Data Protection

Data protection legislation controls how your personal information is used by organisations, including businesses and government departments.

Anyone responsible for using personal data must make sure the information is:

- used fairly, lawfully and transparently
- used for specified, explicit purposes
- used in a way that is adequate, relevant and limited to only what is necessary
- accurate and, where necessary, kept up to date
- kept for no longer than is necessary
- handled in a way that ensures appropriate security, including protection against unlawful or unauthorised processing, access, loss, destruction or damage.

### Domestic Energy Assessor

Domestic Energy Assessor (DEA) is a qualified professional who carries out assessment of the energy efficiency of existing dwellings in accordance with relevant national calculation methodology to produce Energy Performance Certificates (EPCs).

### Energy assessment

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Energy assessment is used to refer to the overall process of completing the inspection and entering the information into the relevant national calculation methodology via the relevant Government Approved software.

### **Energy Efficiency Measure (EEM)**

Planned work undertaken to improve the energy performance of a building by saving or generating energy.

### **Energy Performance Certificate (EPC)**

An Energy Performance Certificate (EPC) refers to the lodged outcome of an inspection that has been undertaken by an energy assessor.

### **Heat Transfer Coefficient (HTC)**

The Heat Transfer Coefficient (HTC), denoted measures the rate of heat transfer between inside and the outsides per degree difference in temperature, expressed in (, watts per metre square Kelvin.

### **National Calculation Methodology**

The National Calculation Methodology (NCM) is a framework that is defined by the Health and Safety Executive (HSE) in collaboration with the Devolved Administrations. It provides a standardised method for calculating the annual energy use of a proposed building and comparing it with a 'Notional' building that meets specific energy performance criteria. This methodology is crucial for demonstrating compliance with the Building Regulations for domestic buildings and is used to produce Asset ratings for Energy Performance Certificates (EPCs).

### **Thermal Bridge**

A point in an element or the building envelope that allows heat to pass through more easily.

### **Traditional Building**

Buildings with a vapour permeable construction that both absorbs moisture and readily allows moisture to evaporate. Examples include but not limited to traditional timber-framed external walls with any infill and those built with wattle and daub, cob or stone, brick and constructions using lime render or mortar.

### **U Value**

A measure of the thermal transmittance of a structure, as single material or a composite, in standard conditions. It is calculated by dividing the rate of transfer of heat through the structure by the difference in temperature across it, expressed in (, watts per metre square Kelvin.

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**Relevant Occupations** Architects, Building and Construction, Construction, Planning and the Built Environment, Professional Occupations, Town Planners and Surveyors

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**Suite** Domestic Energy Assessors National Occupational Standards

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