
Overview

This standard is about preparing Domestic Green Deal (or equivalent programme) Advice Reports, lodging them on the approved register and issuing them to customers. The standard required to carry out an energy inspection of the property fabric and produce an Energy Performance Certificate are covered in INSDEA3 and INSDEA4; those that relate to carrying out the in-home occupancy assessment, which precedes this stage, are covered in INSGDA2. The standard relating to explaining the components of the Green Deal (or equivalent programme) report to customers and the implications for implementing the energy efficiency measures in the report, are covered in INSGDA4.

This standard is about collating all the information you have obtained on the property and its use by the current occupiers and using approved software to produce Domestic Green Deal (or equivalent programme) Advice Reports, which provide bespoke recommendations for energy efficiency measures.

You are required to use the approved software to produce and lodge the completed Domestic Green Deal (or equivalent programme) Advice Reports and issue them to customers. You must also maintain your own internal records in accordance with the relevant data protection legislation.

The assessment carried out and energy efficiency measures included in the Domestic Green Deal (or equivalent programme) Advice Reports provided to customers must be objective and impartial. However, it is possible that in addition to your role as an adviser, you will work for or with a particular organisation or employer and that you will receive referral fees or other benefits from them should the customer use their services. Although you may take on these additional roles including offering customers quotations or proposals for the purchase of particular products, services or suppliers, this must not interfere with the impartial assessment process. In addition, you must fully disclose to the customer, as a minimum verbally ahead of the visit and in any case in writing, any personal interest, benefit or referral fee you will gain if they choose to take up such offers.

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

Performance criteria

You must be able to:

Prepare Domestic Green Deal (or equivalent programme) Advice Reports

1. assemble and collate information gathered before, during and after your home visit, including any pre-existing Energy Performance Certificate for the property
2. use the relevant devolved nation's approved software to prepare Domestic Green Deal (or equivalent programme) Advice Reports
3. undertake further investigations to identify values following the relevant devolved nation's conventions and Code of Practice to reduce or eliminate the use of default values and 'unknown' option
4. where information cannot be obtained, or where data is recorded as 'unknown', detail where this applies and why this action was unavoidable
5. use the relevant devolved nation's approved software to generate energy efficiency measures for the property following guidance and conventions that apply to its use
6. confirm the energy efficiency measures generated and amend or delete any that are not relevant for this property or this customer, providing your reasons
7. use approved software to assess which energy efficiency measures, or packages of energy efficiency measures, are eligible for Green Deal (or equivalent programme) finance
8. prepare Domestic Green Deal (or equivalent programme) Advice Reports that meet the relevant devolved nation's scheme requirements and Certification Body requirements
9. disclose, within Domestic Green Deal (or equivalent programme) Advice Reports, the referral fees or benefits that you may receive should the customer follow your suggestions for particular products, services or suppliers
10. confirm the Domestic Green Deal (or equivalent programme) Advice Report to ensure it meets the relevant devolved nation's required standards

Lodge and issue Domestic Green Deal (or equivalent programme) Advice Reports

1. collate relevant information to support the decisions made and the energy efficiency measures that were considered
2. keep the records of investigations which have been undertaken, the values attributed, and options considered to lodge Domestic Green Deal (or equivalent programme) Advice Reports on the relevant devolved nation's prescribed national register on completion
3. issue Domestic Green Deal (or equivalent programme) Advice Reports to customers within the agreed programme timescales
4. update the Energy Performance Certificate after the installation of

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- agreed energy efficiency measures
 - 5. maintain organisational records which meet Green Deal (or equivalent programme) requirements and relevant data protection legislation

Knowledge and understanding

You need to know and understand:

Prepare Domestic Green Deal (or equivalent programme) Advice Reports

1. the relevant devolved nation's prescribed format and content of a Domestic Green Deal (or equivalent programme) Advice Report
2. the range of information that is required to produce a Domestic Green Deal (or equivalent programme) Advice Report
3. how to access pre-existing the Energy Performance Certificate for the property and the data underpinning it
4. the range of relevant energy efficiency measures that may be included within a Domestic Green Deal (or equivalent programme) Advice Report
5. the relevant devolved nation's approved software used to produce Domestic Green Deal (or equivalent programme) Advice Report and how to use it to the required standards
6. the required quality assurance checks to conduct on own information gathering to confirm that values are correct and energy efficiency measures are relevant for the property
7. the circumstances in which items can be recorded as 'unknown' as defined in the relevant devolved nation's conventions
8. how to gather additional information to avoid the use of default values which arise when items are recorded as 'unknown'
9. the ways in which energy efficiency measures are generated and the circumstances when it is relevant to delete or amend them
10. the way in which the relevant devolved nation's approved software estimates the cost savings from energy efficiency measures
11. how to use the relevant devolved nation's approved software to assess which energy efficiency measures, or packages of energy efficiency measures and are eligible for Green Deal (or equivalent programme) finance
12. the relevant Codes of Practice and standards that apply to preparing Domestic Green Deal (or equivalent programme) Advice Reports
13. the importance of checking the Domestic Green Deal (or equivalent programme) Advice Report to confirm that it meets the required standards
14. the importance of disclosing any referral fees or other benefits you may receive as a result of the customer following your suggestions for particular products, services and suppliers

Lodge and issue Domestic Green Deal (or equivalent programme) Advice Reports

1. how to lodge Domestic Green Deal (or equivalent programme) Advice Reports on the relevant devolved nation's prescribed national register on completion
2. how to issue Domestic Green Deal (or equivalent programme)

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- Advice Reports to customers and why it is important to do so within the agreed programme timescales
3. how to update the Energy Performance Certificate after the installation of agreed energy efficiency measures
 4. the relevant level of detail within your records required to produce a Domestic Green Deal (or equivalent programme) Advice Report
 5. the circumstances in which records can include the fact that information is 'unknown' and the evidence required to support this choice
 6. confirm that records can be accessed for future use when required by relevant organisations
 7. the importance of storing records in accordance with the relevant data protection legislation

Scope/range

Energy efficiency measures:

- all energy performance improvements listed at Appendix T of the current version of Standard Assessment Procedure (SAP)
- any other improvements that may be supported by UK Government policy or that of the devolved nations, as listed in relevant legislation or guidance

Relevant information:

- legible visit notes relating to the occupancy assessment
- clear site sketches (plan, elevation) to give an adequate record of the occupancy assessment for audit purposes
- clear photographs containing mandated data (e.g. time and date) appropriately staged and annotated where necessary
- legibly completed questionnaires or records of conversations
- records of web searches or other research
- records of fuel bills seen and meter readings taken
- any other information you consider necessary to support your decisions
- any other information required by Scheme Operating Requirements

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