

Pre-Reading for DEA Qualification

Dear Candidate, Please see below Pre-Reading (**Self Learning**) for Domestic Energy Assessor Training. It is **compulsory** to complete this pre-reading before the attendance of training course. All information has been written in easy to understand Question/Answer style. Please take your time to read this few times for better understanding.

1- When an EPC is required by law in the UK?

Energy Performance Certificates (EPCs) are needed whenever a property is:
Built, Sold or Rented. This is Key piece of Legislation which requires assessment of energy rating of domestic properties.

You must order an EPC for potential buyers and tenants before you market your property to sell or rent.
EPC assessment is also called RdSAP assessment. **RdSAP** (Reduced Data Standard Assessment Procedure)

1b – In what circumstances EPC is exempted or not required.

Places of worship, buildings for demolition, Temporary buildings e.g. caravans, port cabins, mobile properties. Holiday accommodations rented for less than 4 months in a year. Listed building, you should get an advice from local authority if work carried out would alter the character of the property.

1c- Describe the differences in the Energy Performance Certificate format used in England/Wales and in the Devolved Administrations.

Difference is in Building Regulations and data input. The format of EPC does not change.

1d - What is Minimum Energy Efficiency Standards (MEES) regulation?

The Energy Efficiency (Private Rented Sector) (England and Wales) Regulations 2015 will make it unlawful from April 2018 to let residential or commercial properties with an Energy Performance Certificate (EPC) rating of 'F' or 'G' (i.e. the lowest 2 grades of energy efficiency). **The minimum energy efficiency standard is set at an EPC rating of 'E'.**
The Regulation will be imposed by Trading Standard Officers. Penalties will be based on the rate-able value of the property, up to a maximum of £150,000, per occasion.

1- Which Part of Building Regulations refers to legal requirements of RdSAP assessment?

EPC is specified as a legal requirement in **Part L1B** of Building Regulations.

2- What are UK targets for CO2 emissions reductions?

The UK is committed to reaching net zero by 2050. This means that the total greenhouse gas emissions would be equal to the emissions removed from the atmosphere.

3- When an EPC is required other than legal requirements?

EPC is also required for:

1-Green Deal Finance Scheme - The Green Deal is a scheme for finance / loan designed to help homeowners and landlords invest in renewable energy or energy efficient products, by providing them with attractive finance which they repay through their electricity bills.

2-Feed in Tariff Scheme - (The Feed-in Tariffs (FIT) scheme is a government program designed to promote the uptake of renewable and low-carbon electricity generation technologies i.e. Solar PV Panel, Wind Turbine etc)

3-RHI Scheme (Renewable Heat Incentive) – The Domestic Renewable Heat Incentive (Domestic RHI) is a government financial incentive to promote the use of renewable heat using technologies such as Biomass Boilers, Heat Pumps or Solar thermal panels.

4-ECO (Energy Company Obligation) - The ECO scheme means that large gas and electricity suppliers - including British Gas, EDF Energy, Eon, Scottish Power and SSE etc - are obliged to help households with energy-efficiency measures. This will help save people money on their energy bills, keep homes warmer by offering free home insulations, free heating systems etc.

4- What is the role of EPC within Green Deal ? How customer can express an interest in the Green Deal finance?

EPC is a Pre-requirement for a Green Deal Finance report. Customer can read the EPC to know more about Green Deal or can speak to an assessor to know more. EPC is a first step for a Green Deal Report.

5- For how long the Energy Performance Certificate (EPC) is valid?

EPC certificate is valid for 10 years.

6- For how long EPC data must be stored by a DEA?

For 15 years. Data can be stored digitally or on paper.

It is important to keep records legible, complete and accurate and stored securely.

Records would be needed for Audits, Complaints, Insurance Claims or data analysis.

7a - Describe the circumstances for a customer, in which the data recorded on the database, may be accessed by others?

For Audits, Complaints, Insurance claims, data analysis and Research.

7- State the requirements a DEA must have in place in order to practise?

A DEA must be "fit and proper" in order to practise. Three requirements should be met in order to become "fit and proper" for EPC work. These are:

- 1- Must be qualified (DEA Qualification)
 - 2- Must have Professional Indemnity insurance
 - 3- Must have a CRB / DBS certificate
-

8- How can a DEA apply for CRB / DBS check?

Apply online using below link

<https://www.apply-basic-criminal-record-check.service.gov.uk/>

Cost £18 and it takes up to 7 working days. Delivery by post.

9- What is an Accreditation Body for DEAs and what services they provide? Name 3 Accreditation bodies?

All Energy Assessors need to be members of an Accreditation Scheme before they can issue Energy Performance Certificates (EPCs). Accreditation provides assurance for clients that DEAs are competent to do the job, professionally qualified, and properly insured.

Services Provided by Accreditation bodies are:

Technical Support for DEAs, Quality Assurance by Auditing DEAs work, Professional Indemnity Insurance, Ensuring Ongoing Training (CPD), RDSAP software access to produce EPCs, DEA's enrolment on EPCREGISTER.COM and assist Government in updating EPC Conventions. **These are Government's Scheme Operational Requirements on Accreditation Bodies.**

Popular Accreditation bodies are: **1- Elmhurst. 2- Stroma. 3- Quidos . 4-ECMK.**

10- What are annual CPD requirements for DEAs?

10 hours of CPD (Continued Professional Development) is required by DEAs every year. CPD can be completed in different ways e.g. new trainings in same sector, Attendance of industry related workshops, seminars and exhibitions, online CPDs provided by Accreditation bodies and attending CPD workshop offered by Training providers.

11- What are CONVENTIONS for RdSAP and who makes them?

Conventions are Rules/Regulations, References, instructions and Technical Guidance that DEAs follow in order to conduct EPC assessments. Conventions are made by Government. Conventions ensure quality and consistency.

It is important to ensure that you have access to the most up-to-date version of the RdSAP software and associated Conventions. This is to produce most accurate and up to date EPCs.

Changes in Conventions can have implications on energy ratings and recommendations results i.e. New Results and Recommendations would be according to new conventions, new recommendations will be more appropriate and results will be more up to date.

12- What are Audit Requirements for a Domestic Energy Assessor (DEA) ?

Accreditation bodies will randomly audit 2% EPCs or 1 EPC in a quarter.

Each New Assessor will have their 1st EPC audited. Audit can also be requested on customer complaint or Risk based audit through smart auditing. Usually 1 failed audit would attract 2 more audits (Targeted Audits).

Failing 3 audits in a row will lead to membership suspension until remedial action is completed by an assessor.

DEAs can provide necessary audit evidence electronically through e-mail or through web portal provided by accreditation schemes.

**13- What are the alternatives to RdSAP? When a client should seek an alternative assessment methodology?
What are the Limitations of RdSAP?**

Alternative to RdSAP is SAP (Standard Assessment Procedure).

SAP assessment is required for **New Built EPCs**. Domestic Buildings built after April 2008 are classed as new built and DEAs must not do an EPC assessment on new built properties. **Client should refer to a SAP assessor when an alternative methodology i.e. new built EPC is sought.** Any subsequent EPC after a New built SAP EPC can be done using RDSAP methodology.

Limitations of RdSAP are: RdSAP cannot be used for new built and commercial assessments. Its ratings and recommendations are only for existing dwellings. Also RdSAP works on standard **pre-sets** (assumptions) e.g. *Standard occupancy, standard heating patterns, standard temperature, and standard appliances in every property.* **These factors (Pre-Sets) have no effect on energy rating produced by RdSAP software.**

14- Describe the special factors to take into account for listed buildings and other heritage factors?

Client should seek further advice from appropriate heritage body or local authority.

15a - Explain special consideration that applies to buildings of traditional construction for their energy efficiency?

They may have non standard wall types, unusual wall thickness, hard to treat for insulation and could be too fragile to have improvements carried out on them.

15b – How to minimise the impact of energy efficiency measures in conservation areas and for listed buildings?

Consider making internal changes if external changes are not permitted. Such as:

- 1) Install internal Secondary Glazing instead of external Double Glazing.
 - 2) Internal wall insulation instead of External wall insulation.
 - 3) Internal Draught-Proofing of Doors and Windows.
-

15- What type of advice a DEA could give to a client on energy efficiency in the home and where a client can be referred for further advice on energy saving?

DEA can give simple advice such as: Use low energy bulbs, use heating controls wisely and keep the windows/doors shut when heating is on.

For further professional advice client can be referred to Energy saving trust, utility companies, heating/insulation companies and other specialised energy experts.

16- Name few sources where a DEA can obtain information prior to surveying a building?

Building Control, Land Registry, Owner of building, Google Maps, Estate Agent and EPC Register.

17- Describe some factors that could affect the choice of energy efficiency measures (improvements) for a property.

Cost of measure, Suitable for building or not, Listed Building status, Location, any obstructions e.g. No access.

18- Why it may not be possible to gather all the information required to either complete or undertake an accurate energy assessment?

Access issues, incomplete information, Conflicting evidence, Disputes with client and Technical issues.

19- List some methods and formats for recording information on a property during an energy assessment?

Surveying forms, Notebook, Camera, measuring device and tablet/smart phone.

20- When a potential conflict of interest would require a disclosure to the client?

When Assessor has a financial interest in the Property or when related to someone dealing with the transaction. DEA is allowed to carry out an EPC but will need to disclose his/her interests with property or with people who own property.

21b – What kind of conflict of interest will require the need to decline the EPC instruction?

When client offer bribe or ask for better EPC results by offering more money.

21- How DEAs could ensure that the information they gather is complete and accurate in order to produce an EPC?

Ensure Surveying Forms are complete, Double Check data , Take all mandatory photos of building, ensure final check list is completed.

22- List some critical property features where incorrect choice of values will be significantly detrimental to accuracy of an EPC?

Building Insulation information – Age of the building – Total Area of the Building – Heating & hot water information

23- List some areas of potential uncertainty or insufficient information which could affect value attribution for an assessment?

Building Insulation information – Age of the building – Total Area of the Building – Heating & hot water information

24- How should a DEA carry out checks to avoid common misattributions when inputting data to produce an EPC?

Double check notes, read Surveying notes before data entry, verify all calculations, and check photos.
