



Level 3 Certificate in

## **Domestic Energy Assessment**

### Qualification Specification

Qualification Recognition Number: 600/5478/5

ABBE Qualification Code: CertDEAL312

**June 2023**

## **Why this document is being revised**

This document has been revised by ABBE in April 2019. A summary of the changes made to this document is, as follows:

- New address added to 1.4

This document has been revised by ABBE in June 2023. A summary of the changes made to this document is, as follows:

- References to Qualifications in Wales removed

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# 1. ABBE

## 1.1 Introduction

ABBE, the Awarding Body for Building Education is a forward thinking organisation that offers a range of apprenticeships, qualifications, benefits and support.

ABBE is regulated by Ofqual for the delivery of a range of qualifications. Our qualifications are nationally recognised helping learners to achieve their full potential and ambitions. The full range of qualifications can be found on our website.

## 1.2 Mission Statement

**Our Values - Quality through Standards:** Our aim is to provide a high quality experience by building a strong community of mutual support and trust. We can use our collective talents to build meaningful partnerships to help us all to achieve our goals. ABBE is a recognised Awarding Organisation with strong professional integrity.

**Our Vision:** Is that every learner is confident, successful and has the opportunity to achieve their full potential.

**Our Mission:** ABBE Educates, inspires and empowers learners

## 1.3 ABBE Qualification Specification

This is the ABBE Qualification Specification for the ABBE Level 3 Certificate in Domestic Energy Assessment. The aim of this specification is to provide learners and centres with information about the content of this qualification.

This specification is a live document and, as such, will be updated when required.

Additional qualification details are available for ABBE approved centres in the ABBE qualification handbook.

## 1.4 Enquiries

Any enquiries relating to this qualification should be addressed to:

ABBE  
Birmingham City University  
University House  
15 Bartholomew Row  
Birmingham  
B5 5JU

Telephone: 0121 331 5174  
Email: [abbeenquiries@bcu.ac.uk](mailto:abbeenquiries@bcu.ac.uk)  
Website: [www.abbeqa.co.uk](http://www.abbeqa.co.uk)



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## 2. Qualification Information

### 2.1 Qualification Purpose

This qualification is a professional qualification for those who wish to pursue a career as a Domestic Energy Assessor (DEA). Once qualified, DEAs register with an Accreditation Scheme which accredits them to produce Energy Performance Certificates (EPCs) for individual existing homes (not newly built). This is in accordance with legislation implementing the EU Directive on the Energy Performance of Buildings.

EPCs, energy ratings for homes similar to consumer-friendly 'fridge ratings', have been compulsory at the time of let or sale of domestic properties since 2008. EPCs can only be produced by qualified, accredited energy assessors.

### 2.2 Who could take this Qualification?

The qualification is suitable for new entrants to the sector seeking to begin a career in energy assessment but also for those with experience in property inspection or surveying wishing to gain a qualification in energy assessment.

### 2.3 Qualification Number

ABBE Level 3 Certificate in Domestic Energy Assessment: 600/5478/5

### 2.4 Qualification Level

This qualification has been listed on the Regulated Qualifications Framework (RQF) at: Level 3

### 2.5 Total Qualification Time

This qualification is allocated Total Qualification Time (TQT) this includes Guided Learning (GL) expressed in hours, which indicates the number of hours of supervised or directed study time and assessment. Credit has also be allocated to this qualification.

- The Total Qualification Time (TQT) for this qualification is: 250
- Guided Learning (GL) for this qualification is: 120
- Credit Value: 25 credits

### 2.6 Progression

This qualification has been designed to encourage participation in education and training in other related areas by:

Establishing a framework of education and training for prospective DEAs

- Enabling learners with expertise in other housing areas to qualify as DEAs
- Enabling learners from outside this industry to qualify as DEAs



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- Providing an introduction for those wishing to progress to the ABBE Level 3 Diploma in Domestic Green Deal Advice

## 2.7 Age ranges

Pre 16	No
16-18	No
18+	Yes
19+	Yes

## 2.8 Structure of the Qualification

To achieve this qualification, learners must achieve the four mandatory units.

Mandatory Units			
URN	Unit Name	Credit Value	Level
H/503/8162	Conduct energy assessments in a safe, effective and professional manner	6	3
K/503/8163	Prepare for energy assessments of domestic property	4	3
T/503/8165	Undertake energy inspections	11	3
J/504/0924	Produce and explain Energy Performance Certificates relating to domestic property	4	3

## 2.9 Barred Units

Units with the same title at different levels or units with the same content cannot be combined in the same qualification.

## 2.10 Language

ABBE qualifications and assessment materials will be provided through the medium of English.

## 2.11 Grading

This qualification is: Pass/Fail

## 2.12 Pre-course Procedures

This qualification is available to anyone who is capable of reaching the required standards. They have been developed free from any barriers that unfairly restrict access or progression thereby promoting equal opportunities.

There are no pre-entry requirements for this qualification.



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### **2.13 Qualification Review Boards**

Qualification Review Boards (QRBs) are set up for each qualification. The Boards are drawn from employers, centres, Higher Educational Institutes (HEIs) and others with a vested interest in the sector in which the qualification is used. The purpose of the QRB is to ensure that the content of the qualification and the proposed assessment methodology are fit for purpose and are appropriate to meet the requirements of the sector.

QRBs are ongoing and will be scheduled for specific points within the qualification lifetime; at the notional mid-point and again towards the review date of the qualification. During this process, the QRB will consider any feedback received on the performance of the qualification and will consider if the content, structure, purpose and assessment methodology remain appropriate to the needs of the sector. This will help to improve both our qualification and the specification.



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### 3. Qualification Unit(s)

#### Unit 1: Conduct energy assessments in a safe, effective and professional manner

Unit Reference Number: H/503/8162

Level: 3

Credit: 6

#### Unit Summary

To develop knowledge, understanding and skills to contribute to the health, safety and security of the workplace, develop effective working relationships with others, and conduct energy assessments in a professional and ethical manner, complying with organisational and legal requirements at all times.

#### Assessment Guidance

This unit must be assessed using the following method(s):

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1 Understand the health and safety requirements when undertaking energy assessments	1.1 Explain the relevant legal duties for health, safety and security in the workplace
	1.2 Identify the health, safety and security risks that could exist in different locations, and the action to take to minimise or mitigate risks
	1.3 Identify the risks to self which are associated with lone working
	1.4 Explain why it is important to remain alert to the presence of risks in the workplace
	1.5 Explain the importance of personal conduct in maintaining the health, safety and security of yourself or others
	1.6 Explain how to make use of relevant suppliers and manufacturers' instructions for the safe use of equipment, materials and products
	1.7 Explain who should be informed of any conflicts between different health, safety and security requirements
	1.8 Describe the procedures for different types of emergency
	1.9 Identify the types of suggestions for improving health, safety and security at work that could be made and who should be given them
	1.10 Identify the actions that may be taken to protect customer's property



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2. Understand the nature of professional conduct required when conducting energy assessments	2.1 Explain why it is important to promote goodwill and trust when working with others and ways in which this can be achieved
	2.2 Explain how to identify the information you require and the potential sources of such information
	2.3 Describe how to respond to enquiries from others and how to clarify their information needs
	2.4 Explain how to respond to enquiries which are outside your authority, beyond your area of knowledge or expertise or where the information requested is confidential
	2.5 Define the extent and limits for your own competence and expertise and the importance of not working beyond these limits
	2.6 Describe the ways in which disputes or differences of opinion should be handled and resolved to minimise offence and maintain respect
	2.7 Describe the formal complaints procedure that covers your work in terms of: <ul style="list-style-type: none"> <li>• any specific organisational requirements with regard to complaints</li> <li>• your own responsibility to deal with complaints and attempt to resolve them before escalating to the Accreditation Body, or the equivalent in the Devolved Administrations</li> </ul>
	2.8 Identify the range of potential conflicts of interest that you may encounter and the action required to manage these
	2.9 Explain why it is important to present a positive personal and professional image when dealing with people and how this can be achieved
	2.10 Describe the ways in which you may develop yourself within your role to cover your development needs
	2.11 Define the level of service expected by customers, their expectations as to the outcomes of the energy assessment or advice process and how to deliver an appropriate level of customer service
	2.12 Explain the need for prompt responses to enquiries
3. Understand the legislation, codes of conduct and compliance requirements in relation to energy assessment	3.1 Describe the relevant policies and legislation on combating climate change and the reduction of carbon emissions from buildings
	3.2 Describe the relevant legislation covering: <ul style="list-style-type: none"> <li>• The energy performance of buildings</li> <li>• Compliance with safe working practices</li> <li>• The relevant regulations in the Devolved Administrations</li> <li>• Where appropriate relevant legislation on the use of refrigerants</li> </ul>
	3.3 Describe the relevant official guidance and conventions relating to the assessment of energy performance
	3.4 Describe your specific responsibilities under prescribed codes of conduct and ethical standards



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	3.5 Describe why it is important to comply with mandatory and advisory codes of practice
	3.6 Describe the specific auditing or monitoring requirements that relate to your registration with your accreditation organisation(s), or the equivalent in the Devolved Administrations and your responsibilities in complying with these
	3.7 Describe the framework under which Accreditation Bodies, or the equivalent in the Devolved Administrations, are required to operate, including their Scheme Operating Requirements or equivalent in the Devolved Administrations
	3.8 Explain the importance of obtaining and maintaining appropriate professional indemnity insurance (PII) cover, either through your own business
4. Be able to comply with organisational and legal requirements at all times	4.1 Carry out work in accordance with the relevant legal requirements, legislation and advisory and mandatory codes of practice
	4.2 Carry out work in accordance with the auditing and monitoring requirements of the relevant accreditation or certification organisation(s)
	4.3 Record customer contact information in accordance with organisational and legal requirements such as the Data Protection legislation
	4.4 Identify and maintain appropriate evidence to record to support your decisions and assumptions made when carrying out energy assessments
	4.5 Identify the evidence requirements defined in Scheme Operating
5. Be able to maintain health, safety and security at work	5.1 Take action to mitigate health, safety and security risks
	5.2 Ensure personal conduct does not endanger the health, safety and security of self and other people
	5.3 Take action to ensure the protection of client's property and buildings
	5.4 Adhere to workplace policies and suppliers' or manufacturers' instructions for the safe use of equipment, personal protective equipment (PPE), materials and products
	5.5 Identify procedures for different types of emergency and implement them
	5.6 Make recommendations for improving health, safety and security in the workplace to the relevant person(s)
6. Be able to develop and maintain effective working relationships with colleagues, professionals, clients and others	6.1 Develop and maintain productive working relationships with others
	6.2 Request information from colleagues, professionals, clients and others in a polite, clear and professional manner
	6.3 Identify and make use of further sources of information/help
	6.4 Deal with enquiries from colleagues, professionals, clients and others and seek clarification where necessary



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	6.5 Handle enquiries which: <ul style="list-style-type: none"> <li>• Are outside own authority</li> <li>• Are beyond own area of knowledge or expertise</li> <li>• Involve confidential information</li> </ul>
	6.6 Handle and resolve disputes and/or differences of opinion
	6.7 Adhere to the formal complaints procedure when dealing with a complaint
7. Be able to conduct energy assessments in a professional manner	7.1 Deal with colleagues, professionals, clients and others in a tactful, courteous and equitable manner
	7.2 Carry out work in accordance with prescribed codes of conduct, ethical standards and recognised good practice
	7.3 Record all evidence supporting the assumptions and decisions made during the assessment
	7.4 Demonstrate effective management of work activities and personal and professional development
	7.5 Respond appropriately to pressure from any person/s which may affect own judgment
	7.6 Demonstrate delivery of the appropriate level of customer service
	7.7 Assess customer expectations



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## Unit 2: Prepare for energy assessments of domestic property

Unit Reference Number: K/503/8163

Level: 3

Credit: 4

### Unit Summary

This unit aims to develop the knowledge and skills needed to prepare prior to making an energy assessment, for example taking instructions, clarifying requirements and making initial investigations relating to the property or properties.

### Assessment Guidance

This unit must be assessed using the following method(s):

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Understand the legislation and regulations relating to energy assessments and Energy Performance Certificates	1.1 Explain the regulations and guidance under that legislation relating to the role of Domestic Energy Assessors or alternatives within the Devolved Administrations and the undertaking of energy assessments
	1.2 Identify the types of property and situations that do not by law require an Energy Performance Certificate
	1.3 Identify the types of property and situations that do not, by law, require an Energy Performance Certificate
	1.4 Explain the principles of the Green Deal and the role of Energy Performance Certificates within Green Deal
2. Understand how to agree and confirm instructions to undertake energy assessments	2.1 Explain how to clarify and confirm the expectations of the customer
	2.2 Describe the basic principles of the Green Deal or equivalents within the Devolved Administrations, and the role of Energy Performance Certificates within those schemes
	2.3 State when a potential conflict of interest will require disclosure to the customer, or will require the need to decline the instructions altogether
	2.4 Explain the limitations and constraints that apply to the conduct of energy assessments and to the prescribed methodology
	2.5 Describe the limited circumstances where representative properties and/or data collected by others may be used in the preparation of Energy Performance Certificates for existing dwellings
	2.6 Identify alternatives to the prescribed methodology for existing homes, Reduced Data SAP (RdSAP) and the circumstances when an alternative methodology should be considered
	2.7 Describe the options that the client could consider regarding the use of an alternative assessment methodology,



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	such as referring on to an assessor accredited for that methodology
	2.8 Explain the importance of confirming in writing the arrangements agreed between you and the customer
	2.9 Describe the fee structures and payment arrangements for energy assessments
	2.10 Explain how to confirm on-site inspection arrangements with the customer or other occupier
	2.11 Explain the importance of confirming whether any specific arrangements apply to the energy assessment
	2.12 Describe how to identify and explain any circumstances that prevent you from undertaking an energy assessment
	2.13 Describe how to explain that ratings and recommendations may differ from past assessments due to changes in methodology or legislation and other differences
3. Understand how to investigate relevant matters relating to the property	3.1 Explain the different types of information that it is important to obtain to generate a complete and accurate Energy Performance Certificate
	3.2 Identify the different sources of information relating to the energy performance of the property that can be investigated
	3.3 Describe how to obtain information on relevant matters relating to the energy performance of the property
	3.4 Identify the prevailing geographical/environmental features that may affect the energy performance of the property
	3.5 Describe how to evaluate relevant information in order to identify any significant factors that may influence the energy assessment
	3.6 Describe how to identify circumstances that prevent you from assessing the energy performance of the property
	3.7 Explain why it is important to ensure that you have access to the most up-to-date version of the RdSAP software and associated reference materials
4. Be able to agree and confirm instructions to undertake energy assessments	4.1 Clarify and confirm the expectations and requirements of the client
	4.2 Respond to requests to undertake energy assessments
	4.3 Explain to the client that an Energy Performance Certificate is a legally required document, that its form and content is prescribed and that it must be accompanied by cost effective recommendations
	4.4 Explain to the client the terms and conditions under which the energy assessment will be undertaken including any circumstances or constraints that may prevent it
	4.5 Explain to the client when a potential conflict of interest requires disclosure to the client or requires the energy assessor to decline the instructions altogether
	4.6 Explain to the client the limited circumstances where representative properties and/or data collected by others may be used in the preparation of Energy Performance Certificates for existing dwellings



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	4.7 Where use of the Reduced Data SAP (RdSAP) methodology is not appropriate, direct the customer towards the appropriate approved assessment methodology
	4.8 Confirm agreed arrangements in writing, including date and specific circumstances, protocols and the prescribed form and content
	4.9 Confirm with the client on-site inspection arrangements, including any specific arrangements, the fee structures and payment arrangements
	4.10 Where necessary, explain to the client that ratings and recommendations may differ from past assessments due to changes in methodology or legislation, and other differences
5. Be able to investigate relevant matters relating to the property	5.1 Explain options that the client could consider regarding the use of an alternative assessment methodology, such as referring on to an assessor accredited for that methodology
	5.2 Investigate and record the information necessary to generate a complete and accurate Energy Performance Certificate
	5.3 Evaluate significant factors such as geographical/environmental features that may influence or affect the conduct of the energy assessment
	5.4 Identify circumstances that prevent the assessment of the energy performance of a property (e.g. health and safety) and ensure that the client is informed
	5.5 Ensure that the most up-to-date version of the prescribed software and associated reference materials can be accessed



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### Unit 3: Undertake energy inspections

Unit Reference Number: T/503/8165

Level: 3

Credit: 11

#### Unit Summary

To develop the competences to carry out an inspection in order to determine the energy performance of property by gathering data and information in accordance with the prescribed methodology (RDSAP) to generate an Energy Performance Certificate.

#### Assessment Guidance

This unit must be assessed using the following method(s):

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Understand the information that is needed to produce the data to generate an Energy Performance Certificate (EPC) of a domestic property	1.1 Explain the principles of building structure, services, elements and fabric as relevant to energy performance of property
	1.2 Identify the equipment and resources needed for the inspection and explain how to use them
	1.3 Explain the detailed inspection requirements that apply to a property as defined by the current prescribed methodology, including the definitions and conventions that apply
	1.4 Identify the various characteristics of buildings
	1.5 Identify the space and water heating system(s) and lighting systems present at the property
	1.6 Explain the consequences, for both the rating result and energy efficiency measures, of recording an item as 'unknown' or 'as built'
	1.7 State the purpose behind government procedures for assessing the energy performance of property
2. Understand the range of factors that affect the energy performance of a property	2.1 Explain the factors and assumptions that are made in determining energy performance
	2.2 Explain the definitions and conventions of RdSAP methodology and the effect of changes to them over time
	2.3 Identify the factors that are not deemed to affect the energy performance
	2.4 Explain the relative sensitivity of the different factors that affect energy performance and critical property features where incorrect choice of values will be significantly detrimental to accuracy



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	<p>2.5 Identify in outline the differences between the RdSAP and Standard Assessment Procedure (SAP) energy assessment methodologies</p> <ul style="list-style-type: none"> <li>• Explain the factors that could affect the choice of energy efficiency measures for the property, including:</li> <li>• Issues that make them unsuitable for the property</li> <li>• Interactions between building fabric and building services</li> <li>• Listed building status/conservation areas</li> </ul>
	2.6 Explain the requirements and application of relevant building regulations and other technical standards
	2.7 Explain the purpose behind government procedures for assessing the energy performance of property
	2.8 Describe the types of behavioural advice regarding energy efficiency that can be provided to occupants during inspection
	2.9 Identify the sources of information and advice about energy performance to which occupants can be referred
3. Understand how to collate and maintain records of inspection findings	3.1 Explain the importance of keeping your records legible, complete and accurate
	3.2 Explain the purpose behind government procedures for assessing the energy performance of property
	3.3 Identify the range of methods, formats and conventions for recording information and evidence on the property and its energy performance
	3.4 Identify the required range of information and evidence relating to the property and its energy performance as defined by the current RdSAP methodology and its associated guidance and conventions
	3.5 Identify the level of detail within your records required to produce complete and comprehensive Energy Performance Certificates and justify your decisions on values recorded and energy efficiency measures selected
	3.6 Describe the importance of making and maintaining records that are complete, accurate and legible
	3.7 State the reasons why it is necessary and important to record where and why accurate inspection has not been possible
	3.8 Describe the circumstances in which records can include the fact that information is 'unknown' and the evidence required to support this choice
	3.9 Describe why it is important to store records securely allowing for future access
	3.10 State the purposes for which your records may be used
4. Be able to inspect property to determine energy performance	4.1 Introduce self and provide evidence of identity to those present at the property before commencing the inspection
	4.2 Ensure that you have the equipment and resources needed for the inspection, use them correctly and interpret data accurately



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	4.3 Identify and record the age and method of construction of the property, the main materials used including the glazing, and the space, water-heating and lighting systems present
	4.4 Explain to the client any circumstances which prevent the inspection of the property
	4.5 Undertake a methodical visual inspection of all relevant aspects of the property in accordance with the requirements of the Reduced Data SAP (RdSAP) methodology and its conventions, to provide an outcome which is consistent with other energy assessors
	4.6 Provide behavioural advice regarding energy efficiency to occupants where possible and sources of further information and advice
5. Be able to collate relevant information to assess the energy level of the property	5.1 Make accurate observations and measurements to provide data for calculation of energy performance ratings
	5.2 Obtain all additional information that is needed about the property especially where this is needed to avoid recording an item as 'unknown'
	5.3 Make further investigations where observations are inconsistent with existing evidence and expected findings, identifying the causes of these inconsistencies
	5.4 Identify 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
	5.5 Follow the correct procedures for collecting information to enable the energy efficiency of the property to be determined
	5.6 Identify and record any factors that could affect the choice of energy efficiency measures for the property, such as: <ul style="list-style-type: none"> <li>• Issues that make them unsuitable for the property</li> <li>• Listed building status</li> <li>• Interactions between building fabric and building services</li> </ul>
6. Be able to maintain records of inspection findings	6.1 Produce and maintain complete, accurate and legible records of your findings, including: <ul style="list-style-type: none"> <li>• Investigations carried out</li> <li>• Values recorded</li> <li>• Options considered</li> </ul>
	6.2 Record information at a sufficient level of detail to produce complete and comprehensive Energy Performance Certificates and justify your decisions on values recorded and energy efficiency measures selected
	6.3 Identify the range of information and evidence relating to the property and its energy performance as defined by the current RdSAP methodology and its associated guidance and conventions
	6.4 Create, maintain and supply records of which energy efficiency measures were considered and rejected with reasons



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	6.5 Explain and record any circumstances where accurate inspection has not been possible or where the information is 'unknown'
	6.6 Ensure that records are catalogued and stored securely and can be readily accessed for appropriate purposes
	6.7 Co-operate promptly with requests for inspection records in relation to monitoring or investigation by your Accrediting Body, or equivalent in the Devolved Administrations



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## Unit 4: Produce and explain Energy Performance Certificates relating to domestic property

Unit Reference Number: J/504/0924

Level: 3

Credit: 4

### Unit Summary

This unit aims to cover the activities once the inspection is completed, for example how the Energy Performance Certificate (EPC) is produced and filed, and how recommended measures work to improve the energy performance of the property may need to be communicated to the relevant individuals.

### Assessment Guidance

This unit must be assessed using the following method(s):

- Portfolio of evidence

<b>Learning Outcome The learner will:</b>	<b>Assessment Criterion The learner can:</b>
1. Understand the principles underpinning the Energy Performance Certification process	1.1 Describe 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
	1.2 Describe the relationship between the building fabric, building location and building services and their impact on energy assessment process and energy efficiency measures
	1.3 Identify ways of ensuring that the information gathered leads to realistic and practical energy efficiency measures
	1.4 Describe the necessary quality assurance checks to conduct on own information gathering to ensure values are correct and energy efficiency measures are realistic
	1.5 Describe how to identify problematic or 'unknown' factors which could affect value attribution
	1.6 Describe how to gather more information to avoid use of default values
	1.7 Identify the critical property features where incorrect choice of values will be significantly detrimental to accuracy
	1.8 Describe the prescribed format and content of an Energy Performance Certificate
	1.9 Describe the differences in the Energy Performance Certificate format used in England/Wales and in the Devolved Administrations
	1.10 Describe the Conventions used in Reduced Data SAP (RdSAP) energy assessment and the implications for results when these change



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	1.11 Describe 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
	1.12 Identify the special factors to take into account for listed buildings and other heritage factors
	1.13 Describe ways to minimise the impact of measures in conservation areas and/or listed buildings to address likely concerns of Conservation Officers, or equivalents in the Devolved Administrations
	1.14 Describe the range of energy efficiency measures to improve the energy performance of property that may be included within an Energy Performance Certificate
2. Understand the principles and operation of the approved software used to generate recommendations for improved energy performance of a property	2.1 Describe the software used to produce Energy Performance Certificates and how to use it correctly
	2.2 Describe the principles underpinning the approved software used to calculate energy ratings
	2.3 Describe how to input data using the approved software in order to determine energy performance ratings
	2.4 Describe how to use approved software to generate energy efficiency measures for measures to improve the energy performance of property
	2.5 Identify the circumstances in which items can be recorded as 'unknown'
	2.6 Describe why it is important to check that data has been inputted correctly and how to review data if the calculation will not process or appears incorrect
	2.7 Describe why it is important to check the energy efficiency measures generated, deleting any that are inappropriate and providing your reasons
	2.8 Describe the way in which energy efficiency measures are generated and circumstances when it is appropriate to delete them
	2.9 Describe why it is important to use plain language and appropriate terms where free text is allowed and of complying with data protection
	2.10 Describe why it is important to check the Energy Performance Certificate to ensure it is clear and complete
	2.11 Explain the special considerations that apply to buildings of traditional construction in relation to their energy efficiency
	2.12 Identify areas of potential uncertainty or insufficient information which could affect value attribution and carry out checks to avoid common misattributions when inputting data



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	<p>2.13 Identify critical property features where incorrect choice of values will be significantly detrimental to accuracy in terms of: Rooms in the roof Retrofitted insulation Un-separated 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 to rating accuracy</p>
	2.14 Explain the circumstances in which items can be recorded as 'unknown'
	2.15 Explain the way in which recommendations are generated and the circumstances when it is appropriate to delete them
	2.16 Describe the role of Government's Scheme Operational Requirements on Accreditation Bodies and how they must be followed to ensure the accuracy of entries and quality of energy efficiency measures selected
3. Understand the process for issuing Energy performance Certificates and explaining their contents	3.1 Describe how to establish the customer's understanding of the Energy Performance Certification process and their expectations as to outcomes
	3.2 Identify the components and outcomes of the energy assessment process and likely customer queries about them
	3.3 Describe 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
	3.4 Explain why it is important to inform the customer when the Energy Performance Certificate is available
	3.5 Describe how to interpret the ratings and energy efficiency measures provided in the Energy Performance Certificate
	3.6 Describe how to explain all the component parts of the Energy Performance Certificate and their implications clearly to the customer
	3.7 Identify the limitations of the approved software and their implications for both ratings and energy efficiency measures
	3.8 Describe the circumstances in which the data recorded on the prescribed database may be accessed by others
	3.9 Describe how to respond to queries regarding the Energy Performance Certificate and provide clarification of the contents
	3.10 Describe the limitations on answers to queries which it is appropriate to provide to customers
	3.11 Identify the sources of further information and advice to which people could be referred
	3.12 Describe the role of the Energy Performance Certificate within Green Deal



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	3.13 Describe how customers can express an interest in the Green Deal and the first steps in the process
	3.14 Describe the characteristics of good customer service
	3.15 Describe the necessary features of a complaints procedure and how customers may access your own complaints procedure
	3.16 Describe the reasons for maintaining clear and complete internal records
	3.17 Identify the minimum period of time for which you must retain records
	3.18 Describe how to draw the customer's attention to any energy efficiency measures specifically excluded by the assessor if requested to by the customer
	3.19 Explain the terminology used on the Energy Performance Certificate, paying attention to differences between the precise meaning of the terms and their commonly used meaning
	3.20 Describe 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
4. Be able to generate Energy Performance Certificates using approved software	4.1 Assemble and collate information from the on-site inspection and from other relevant and reliable sources
	4.2 Use approved software to determine energy performance ratings ensuring that data is entered accurately
	4.3 Take appropriate steps to correctly represent the property's critical property features to arrive at an accurate assessment of the property
	4.4 Obtain sufficient information to ensure values entered for all components are accurate
	4.5 Before inputting an item as 'unknown', carry out sufficient investigations to minimise the use of default values
	4.6 Use approved software to generate energy efficiency measures for the property
	4.7 Take account of the interaction between the building fabric and the services in the building when considering energy efficiency measures
5. Be able to produce an Energy Performance Certificate	5.1 Produce an Energy Performance Certificate that meets relevant codes of practice and standards, including the accurate recording of the date prepared and relevant property address
	5.2 Use plain language and appropriate terms where free text is allowed
	5.3 Check the recommendations generated and delete any inappropriate ones, in accordance with conventions and providing reasons for doing so
	5.4 Provide a set of energy efficiency measures tailored to the fabric and location of the building, taking account of available fuel supplies and current conventions



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	5.5 Check that data has been inputted correctly and review data if the calculation will not process or appears incorrect
	5.6 Recognise a result that is clearly incorrect for the property in question
	5.7 Take the necessary corrective action where any of your checks indicate a possible misattribution of data or error in the resulting rating or energy efficiency measures
	5.8 Check the data is complete before finalising the Energy Performance Certificate and check it to ensure it is clear and complete
6. Be able to issue and explain the Energy Performance Certificate	6.1 Lodge Energy Performance Certificates on the prescribed national databank on completion
	6.2 Inform the customer that the Energy Performance Certificate has been completed and is available to them
	6.3 Establish the customer's understanding of the Energy Performance Certification process and their expectations as to outcomes
	6.4 Explain all the component parts of the Energy Performance Certificate and their implications
	6.5 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
	6.6 Explain to customers the limitations of the approved software for both ratings and energy efficiency measures
	6.7 Respond to queries about the Energy Performance Certificate and clarify their contents when necessary
	6.8 Provide a high standard of customer service in all dealings with your customer including issuing and explaining their Energy Performance Certificate
	6.9 Inform your customer that you have a complaints procedure and advise them how to access it
	6.10 Collate relevant information as evidence to support the specific decisions made on values and energy efficiency measures considered
	6.11 Maintain records of which energy efficiency measures were considered and rejected with reasons
	6.12 Keep accurate and traceable records of investigations carried out, values attributed and options considered
	6.13 Maintain internal records which are clear, complete and conform to professional and statutory requirements
7. Be able to explain to customers how the Energy Performance Certificate may	7.1 Identify the circumstances where data collected during the inspection and recorded on the prescribed database may be accessed by others



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be used to improve the energy efficiency of domestic property	7.2 Identify relevant sources of additional information, advice and support
	7.3 Identify ways to minimise the impact of measures in conservation areas and/or listed buildings to address likely concerns of Conservation Officers
	7.4 Explain the precise meaning of any terms used on the Energy Performance Certificate where this differs from their commonly used meaning
	7.5 Explain why predicted savings from energy efficiency measures, based on standard occupancy, may not be achieved in practice
	7.6 Explain the role of the Energy Performance Certificate within Green Deal
	7.7 Explain how customers can express an interest in the Green Deal and the first steps in the process



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