

NDEA Quality Assurance Minimum Evidence Requirements England, Wales & Northern Ireland Effective Date 1st April 2012

Core Requirement

The evidence provided by an energy assessor to a Scheme, and retained by that Scheme, must be sufficient for an independent QA assessor to generate an EPC with an identical BER and EPC rating as the assessor based on the evidence provided, and that the evidence provided should be of such a nature that an independent QA assessor will be reasonably certain that the evidence provided relates to the particular EPC.

EXISTING NON-DOMESTIC BUILDINGS

The correct and lodged Data File* and/or Software Data Collection Forms– This must detail the information used by the Energy Assessor to calculate the EPC, and allow the Scheme QA auditor to assess the accuracy of the EPC against each stage of data entry into the SBEM or DSM

*** Note – for PT Lifespan users there is no Data File to submit.**

Floor Plan– This should consist of a design or sketch plan covering all levels, annotated with measurements, areas, zones and Heat Loss Perimeter (HLP) etc. which allows the EPC to be recalculated.

Site Notes– The Energy Assessor must provide, within the site notes, anything used in support of decision making, reflective thought, or amendments to recommendations (e.g. identifying property age, construction, assessing any HVAC system etc.), which is not provided elsewhere.

Mandatory Photographic and Documentary Evidence– To include good quality fully dated photographs, where practical, and providing evidence of the following:

- Aerial view of the building (from Google Maps or similar) that clearly identifies the building and site layout in order to confirm orientation, or a hyperlink to the aerial view of the building
- Evidence in support of activities stipulated within zones
- All external elevations - front, rear and side(s)
- Construction – e.g. cavity or solid wall with insulation (if present), all construction types covered
- Glazing types, including the g-value (g-value EN ISO 410)
- Shading
- Roof construction and roof lights
- For each HVAC system depending on the system type: ‘effective heat generator seasonal efficiency’, Generator Seasonal Energy Efficiency Ratio (SEER) and Generator Nominal Energy Efficiency Ratio (EER), chiller and generator type, heat recovery system, presence of fans and pumps along with pump power and/or SFP, fuel type and controls (including HVAC manufacturer/make/model numbers and any third party evidence of calculations)

- Heat/coolth emitters within zone/areas
- Controls within zones/areas
- HWS type, efficiency, fuel, volume and/or storage losses, pump power, secondary circulation
- Lighting, including controls, within zones
- Evidence of LZC technologies and relevant data
- Sub-metering
- Power factor correction
- Accredited details
- Any other key feature of the building, or limitation whose presence or absence may affect the EPC rating or which would be required to support any claim made in the report, that could be subsequently queried or be the subject of a complaint

Where the Energy Assessor believes that photographs are not practically achievable, but a particular element / energy using device is present, the site notes should be expanded to compensate for the missing photograph(s) and a sufficient reason/explanation must be given as to why the missing photographic evidence was not provided.

It is possible that a number of the elements listed above may be shown in a single photograph. However, should you choose to adopt this approach, you must ensure that the photograph is of sufficient quality to allow our auditors to clearly identify all mandatory details.

Please note: photographs must be dated within the image to prevent the use of stock images. Electronic files will only be accepted if there is a 'foolproof' means of dating the file.

Supplementary Calculations Undertaken by the Assessor – examples of these may be:

- Overshading calculations
- Common values
- CoP/SEER/EER
- SFP
- Extraction rates

Other Evidence to Justify the Suppression/Inclusion of Additional Recommendations - examples of this may be:

- A guarantee or a Building Control notice for improvements
- Evidence of a building's age

NEWLY CONSTRUCTED NON-DOMESTIC BUILDINGS

Data File and/or Software Data Collection Forms – this must detail the information used by the Energy Assessor to calculate the EPC, and allow the Scheme QA auditor to assess the accuracy of the EPC against each stage of data entry into the SBEM or DMS.

This information must also allow the Scheme to deduce the software (and version) used to produce the EPC.

Floor Plan – a Design floor plan, elevations, sections etc which allow the EPC to be recalculated. This should consist of a plan covering all levels, annotated with measurements, areas, zones and HLP etc.

AS-BUILT CHECKS (Newly Constructed Buildings Only)

Evidence That the Property Has Been Built as per the Design – including:

- A statement from the developer, or equivalent person who is working for the client who is in the position to provide a professional judgement, that the building has been constructed (services, fabric U-value and glazing g-value etc) in line with the design and, if not, what the differences are between the finished building and the design
- A copy of the pressure test certificate which is relevant to the building
- An Accredited Construction Details (ACD) certificate, if applicable

Supplementary Calculations Undertaken by the Assessor – examples of these may be:

- Over shading calculations
- Common values
- CoP/SEER/EER
- SFP
- Extraction Rates
- Emission factors for district heating schemes (either calculated or provide documentation from the provider / ESCO)

Any Other Evidence - required to justify the suppression or inclusion of additional recommendations.