

## Technical Bulletin – 11<sup>th</sup> June 2019

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### Conventions Updates

Following the final meeting of the RdSAP Conventions group, version 11 of the Conventions have been sent to the Government for approval. There are two important changes which Quidos wanted to inform assessors about.

#### **NEW: Convention 6.10**

Although v.11 of the RdSAP Conventions have yet to officially released, all Schemes have agreed that we should begin implementation of this change immediately.

There are systems currently available where electricity from solar PV panels are used to boost hot water producing within a hot water cylinder.

The two devices on the market are **iBoost** and **immerSUN**.

These types of systems are not able to be effectively modelled in RdSAP currently, but this scenario has raised concerns from some homeowners that their EPCs are being left with recommendations for solar thermal water heating.

New Convention 6.10 states the following:

6.10	Water heated by PV	<p>In some dwellings, water may be heated by PV systems which use an additional device that focuses the electricity generated to heating the hot water via the immersion. The device is essentially an automatic power controller that diverts surplus power to a designated load, normally a hot water heater.</p> <p>Where the presence of such device can be evidenced, the assessor can suppress the recommendation for Solar (thermal) Hot water heating.</p>
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## Updated: Convention 3.05

When the new version of the RdSAP Conventions is released, it will update the wording for the convention relating to the age band of a conversion. Quidos will be immediately implementing this change to our assessors as we believe it resolves the majority of queries which we receive.

One of the biggest queries we have is dealing with the age band to use for dwelling which has been formed following a conversion or material change of use. If this was done after 2008, the dwelling would have needed a SAP EPC, as per our Guidance on the [Appropriate Use of RdSAP](#).

Convention 3.05 will be changing to say:

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***After applying Convention 1.01, for a conversion which was a change of use (e.g. barn converted to a dwelling) or where a dwelling has been sub-divided (e.g. house to flats), always use the original construction date, and specify upgraded elements only where documentary or visual evidence is available.***

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### Why are we telling you to always use the original age?

Well, it's pretty obvious, but this is the date that the dwelling was built. With a material change of use, the newly built dwelling is not required to meet all of the requirements of Building Regulations Part L.

For example when we have a conversion for something like a barn conversion, this will likely have thick stone walls which would be visible both inside and out. To meet the full Buildings Standards, these should have been full insulated at conversion. Given you might see the stone walls, these could not have been insulated.

Putting a modern build date would improve the rating of the dwelling by more than it would actually be.

In terms of added insulation, this can either be physically measured, or you can make use of a documentary evidence. A final completion certificate will often only state that work was completed in line with the works outline in an initial notice and/or schedule of works. The initial notice and/or schedule of works will outline all of the upgrades made to the dwelling. The fact that these have been approved with the final notice means that these can be input as documentary evidence for the dwelling.

These changes are much easier to interpret than 'evidence needed that all of the thermal elements have been upgraded', and also ensures that DEAs are checking to ensure that dwellings from a material change of use get the necessary SAP EPC as well.

## New RBAS trigger rules incoming

As noted in the last Quidos Technical Bulletin (17/05/2019), an update to the RBAS auditing trigger rules is to be introduced from 1<sup>st</sup> July 2019. This version 1.3 has been approved by the EASOB working group, and implemented across the Industry.

Below, you will find the rules in two versions: by number and by selection priority order.

#	Rule	Priority No.	Risk/Impact on EPC
1	No main heating system present, but mains gas supply available.	2	Highest
2	Main building age band is L	3	Highest
3	Heating controls of boiler energy manager	4	High
4	Overridden U-values for the main building walls	5	High
5	Any building part on any element has insulation type recorded as unknown	-	<b>DORMANT</b>
6	No heating controls present, but main heating system is a gas (incl. LPG) or oil boiler	9	High
7	Ground floor of main building room height is <1.5m or >4m	-	<b>DORMANT</b>
8	Mechanical ventilation present in property built prior to 2003 (including supply/extract)	11	Medium
9	Gas boiler main heating system and hot water from electric immersion	-	<b>DORMANT</b>
10	Duplicate lodgement of an EPC for the same property within 1 month by the same assessor	-	<b>DORMANT</b>
11	Age band A cavity walls	13	Lowest
12	No access to main building loft	14	Lowest
13	No access to HW cylinder	15	Lowest
14	Multiple lodgements by same assessor on same property within 1 calendar month where SAP rating was F or G but is now E or above	16	Medium
15	Wall of any building part that has insulation type unknown	6	High
16	Floor of any building part that has insulation type unknown	7	High
17	Non-pitched roof or roof room of any building part has insulation type/thickness 'unknown'	8	High
18	Duplicate lodgement of an EPC for the same property within 7 calendar days by the same assessor	-	<b>DORMANT</b>
19	Gas/Oil/LPG boiler main heating system and hot water from electric immersion	12	Medium
20	Any floor of any building part room height is <1.5m or >4m	10	High
21	Any occurrence of 2 or more EPC lodgements for the same UPRN within a 3 calendar month period made by assessors from the same scheme.	1	Highest

## By Priority Order

#	Rule	Priority No.	Risk/Impact on EPC
21	Any occurrence of 2 or more EPC lodgements for the same UPRN within a 3 calendar month period made by assessors from the same scheme.	1	Highest
1	No main heating system present, but mains gas supply available.	2	Highest
2	Main building age band is L	3	Highest
3	Heating controls of boiler energy manager	4	High
4	Overridden U-values for the main building walls	5	High
15	Wall of any building part that has insulation type unknown	6	High
16	Floor of any building part that has insulation type unknown	7	High
17	Non-pitched roof or roof room of any building part has insulation type/thickness 'unknown'	8	High
6	No heating controls present, but main heating system is a gas (incl. LPG) or oil boiler	9	High
20	Any floor of any building part room height is <1.5m or >4m	10	High
8	Mechanical ventilation present in property built prior to 2003 (including supply/extract)	11	Medium
19	Gas/Oil/LPG boiler main heating system and hot water from electric immersion	12	Medium
11	Age band A cavity walls	13	Lowest
12	No access to main building loft	14	Lowest
13	No access to HW cylinder	15	Lowest
14	Multiple lodgements by same assessor on same property within 1 calendar month where SAP rating was F or G but is now E or above	16	Medium

Additionally, as we stated in our last technical bulletin, the way that Schemes have been requested to select and prioritised audit selection has changed, which means we will no longer be prioritising RBAS audit selections. This means that only the first few priority rules above may be selected; indeed, for audits selected from May lodgements, we did not call any RBAS at all.

## May RBAS lodgement figures

#	RBAS Trigger Description	# EPCs	# DEA	# Audit	APR # EPCs	APR # DEA	APR # Audit
1	No main heating system present, but mains gas supply present	11	10	0	8	8	6
2	Main building age band of L	26	23	0	34	18	7
3	Heating controls of boiler energy manager	1	1	0	2	2	2
4	Overridden U-Values for the main walls	6	2	0	1	1	0
6	No heating controls present, but main heating system is a gas (incl. LPG) or oil boiler	21	19	0	28	22	12
7	Ground floor of main building room height is <1.5m or >4m	9	7	0	5	4	3
8	Mechanical ventilation present in property built prior to 2003	24	12	0	24	11	6
9	Gas boiler main heating system and hot water from electric immersion	20	12	0	19	9	3
11	Age band A (pre-1900) with cavity walls	22	14	0	13	9	1
12	No access to the main building loft	1090	199	0	1007	158	0
13	No access to hot water cylinder	99	57	0	138	62	0
14	Multiple lodgements by same assessor on same property within 1 calendar month where SAP rating was F or G but is now E or above	37	29	0	10	10	7
15	Wall of any building part that has insulation type unknown	29	21	0	33	19	14
16	Floor of any building part that has insulation type unknown	22	19	0	22	17	13
17	Non-pitched roof or roof room of any building part has insulation type/thickness 'unknown'	52	40	0	55	40	26
<i>Audits above which had triggered additional rules</i>				0			2
<b>TOTAL RBAS AUDITS SENT</b>				<b>0</b>			<b>102</b>

## Why will a domestic audit fail?

In recent weeks, we have noted a number of comments from DEAs in relation to auditing failures: "...all for the sake of 2 SAP"; "...but the rating hasn't changed"; "it's only a minor error".

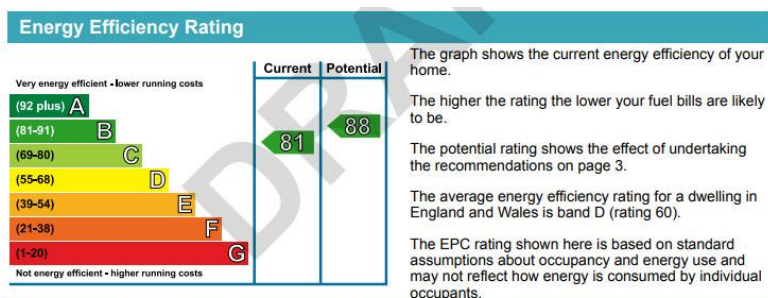
DEAs seem to be fairly fixated on the 5 SAP point absolute variance as the only reason for an auditing failure.

In spite of a common misconception, and this should be of no surprise considering all DEAs would have read the [QA Standards for DEAs](#), but there are **FOUR** reasons for which an audit will fail our auditing processes. Three of these reasons are technical and require a relodgement to be made, and the other relates to the evidence provided by the assessor.



1. The sum of the absolute errors between the energy assessor's and QA assessor's SAP score is more than 5 SAP points. This does not allow for 'self-corrective errors'. *SAP score errors are based on the total number of errors. E.g. +4, -2, +1 has an absolute variance of 7 SAP points, not 3.* The SAP rating is merely a calculated figure based on a ratio between total floor area and the total energy costs for the dwelling – to solely base pass/fail criteria on a calculation is nonsensical as there are further elements of the output from an audit which could be questioned, as the next two points demonstrate;
2. If errors in the building's description would result in a change in the recommendations made;
3. If the building's description is insufficiently accurate such that it brings into question the accuracy of the rating. This is taken to mean information on an EPC – if a mistake by a DEA leads to changes in the written description, or wording, of the report, this can lead to the accuracy of the SAP score being questioned;
4. Insufficient evidence for the audit to be completed; the EPC will be deemed defective until the necessary information is provided to confirm your data inputs. An EPC can then be considered correct, but the audit status will remain as a fail.

Irrespective of whether a replacement EPC has a SAP variance of less than 5, an audit will always fail if there is a change to the recommendations and/or description of the EPC.



This example EPC shows a dwelling with a SAP rating of 81; the construction is marked as Cavity wall, with 300 mm of loft insulation and a solid floor.

However, we can completely redefine the characteristics of the dwelling but still remain within the 5 SAP point variance.

**Summary of this home's energy performance related features**

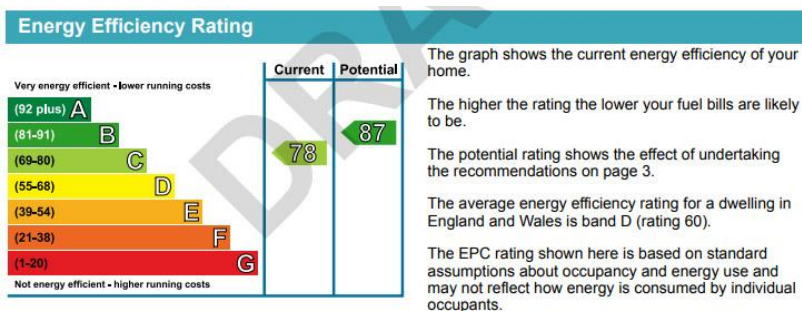
Element	Description	Energy Efficiency
Walls	Cavity wall, as built, insulated (assumed)	★★★★☆
Roof	Pitched, 300 mm loft insulation	★★★★★
Floor	Solid, insulated (assumed)	—
Windows	Fully double glazed	★★★★☆

The replacement EPC here is for the same

dwelling, but with a solid brick construction, 250 mm less insulation than previously, and also a suspended timber floor.

On a purely mathematical level, if only the 5 SAP variance was considered, this EPC could be deemed as correct, as it is within the tolerances, but there is no way a DEA can say this EPC is a correct and accurate reflection of the dwelling.

In addition to the 5 SAP variance, we also examine the description of the EPC and the recommendations which are



**Summary of this home's energy performance related features**

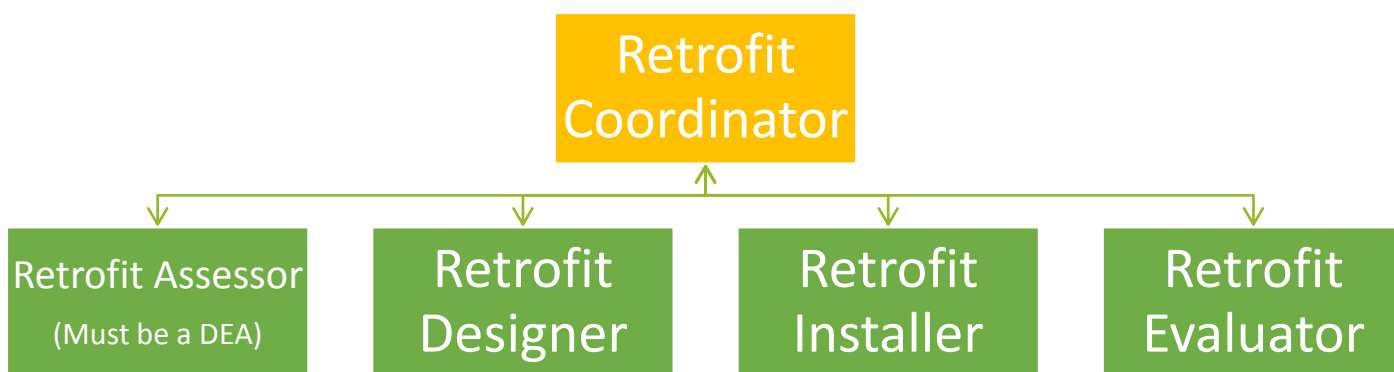
Element	Description	Energy Efficiency
Walls	Solid brick, as built, insulated (assumed)	★★★★☆
Roof	Pitched, 50 mm loft insulation	★★☆☆☆
Floor	Suspended, insulated (assumed)	—
Windows	Fully double glazed	★★★★☆

shown. If either of these change between the lodged EPC and the corrected version, the audit must be a failure.

## **Retrofit assessments: a new way of working**

Attendees of the PEPA Conference 2019 would have noted a number of repeated references to a new retrofit assessor role which will be integral in the completion of all ECO and retrofit works in the near-future.

The basis for this retrofit assessor role is PAS2035, a new standard for the energy retrofit of domestic dwellings. The standard will encompass a number of areas from energy assessment to completed building works, ensuring that any retrofit works completed are done to ensure the best energy outcomes for the dwelling and long-term reductions in costs and carbon emissions.



Where retrofit works are needed, such as for ECO improvements, a retrofit coordinator will facilitate all works, acting as a project manager for the whole process.

At the start of the process, an assessment of the dwelling will need to be undertaken. This will be separate from an EPC assessment, and look at the condition and elements of the dwelling, historic considerations, and occupancy-based inputs. This assessment acts as the basis for the retro works to be completed.

Under the banner of PEPA, Quidos is working closely with the other Accreditation Schemes and TrustMark to facilitate a training programme and pathway to qualification. This will look to go live within the next 18 months.

If you would like further information about the retrofit assessor role and how it might impact somebody who is currently a domestic energy assessor, you should contact Catherine Garrido: [catherine@quidos.co.uk](mailto:catherine@quidos.co.uk).

## Replacement for Feed-in Tariff Announced

Following a consultation earlier this year, the Department for Business, Energy, & Industrial Strategy (BEIS) has just (10<sup>th</sup> June) released a response to the consultation and introduced new secondary legislation for the replacement of the Feed-in Tariff.

The Smart Export Guarantee (SEG) will be provided by energy companies to small-scale energy generators for installations up to 5MW. As the Guarantee price will be determined by the company, there will hopefully be a range of different pay back prices available for generators.

In order to be eligible, generators will need to have a smart meter fitted to their property.

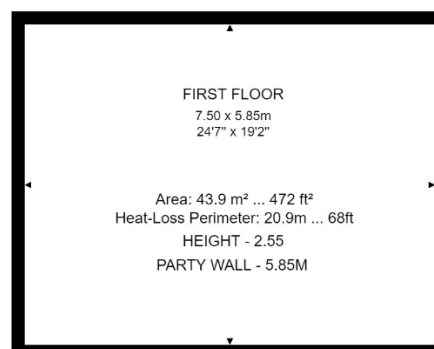
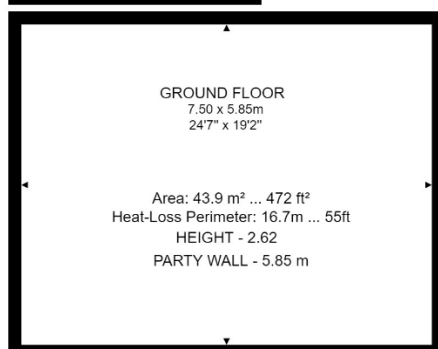
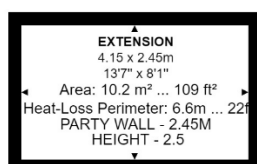
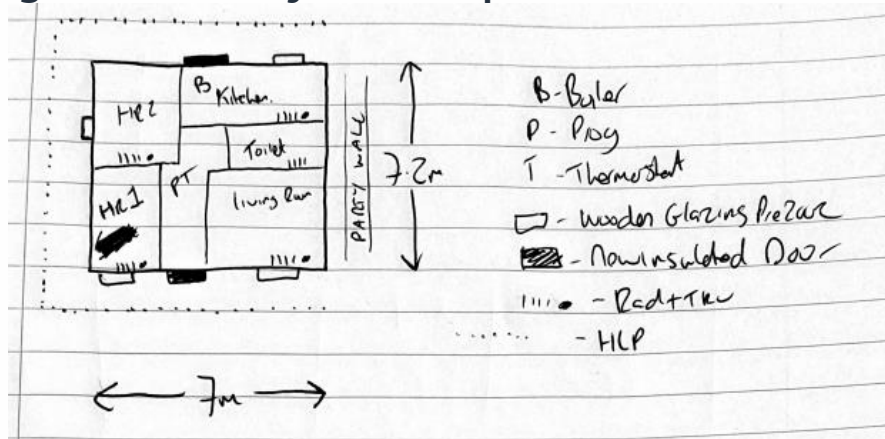
The main change that will impact on Energy Assessors is that there is no energy efficiency criteria needed for eligibility. With FiT, the dwelling needed an EPC D rating prior to renewables installation in order to get the higher tariff price; the new SEG will be a single price, thereby eliminating a need to ensure an efficiency rating.

Only the very basics of Scheme have been released, but the SEG Licensees should be in place by 1<sup>st</sup> October 2019, with the full mechanisms and guidance in place by 1<sup>st</sup> January 2020.

When we get any further information, we will release it in a Technical Bulletin.



## zPlan – making the most of your floorplans



Above are genuine examples of floorplans that we have received for audit. They are by no means the worst floorplans they we've received, but you can easily make so much more from your floorplans.

The zPlan floor planning software has now joined the ranks of the Quidos family. zPlan is designed with assessors in mind; its intuitive interface makes it quick and easy to produce quality floorplans for your clients. Coupled with our CPD-certified [floorplan training](#), you'll be producing floorplans in no time at all.

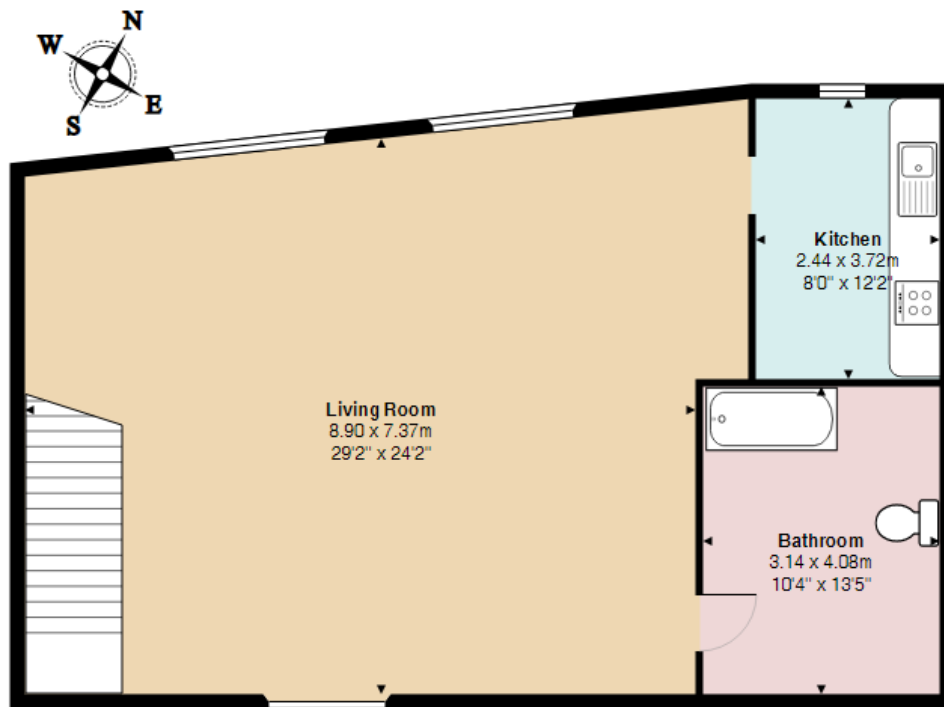
Offering monthly packages from **£24.99+vat** for up to 40 floor plans, zPlan has the same great features as other floor plan training software at a much cheaper price.

Not only can plans be exported as flat 2D plans, but just one click and product a 3D layout of the dwelling for your clients at no extra cost. Add furniture, fixtures and fittings to make a plan which really stands out above the rest.

On the next page, you will be able to see example from the zPlan software.

# Technical Support Bulletin *Quidos*

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ZPLAN

[www.zplan.co.uk](http://www.zplan.co.uk)


## Technical Support

Don't forget, if you have any technical support queries, these should be emailed to our Support Log along with some photos so that we can provide the best advice as possible.

Your query can be logged directly with the Support Log at: <http://support.quidos.co.uk>.

Or email: [support@quidos.co.uk](mailto:support@quidos.co.uk)

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-  [How do I access the Quidos Support Team?](#)
-  [Have you checked the RdSAP Conventions?](#)

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### Technical Support Publications

#### Technical Bulletins (17)

-  [Quidos Technical Bulletin - 16/08/2018](#)
-  [Quidos Technical Bulletin - 20/06/2018](#)
-  [Quidos Technical Bulletin - 29/03/2018](#)
-  [Quidos Technical Bulletin - 19/02/2018](#)
-  [Quidos Technical Bulletin - 22/01/2018](#)


[» See all 17 articles](#)

#### Helpsheets (7)


-  [The Appropriate Use of RdSAP](#)
-  [QA Bulletin: Stock Images and Implications of Use](#)
-  [TS003 - Addenda to EPCs](#)
-  [TS001 - Energy Efficiency Regulations](#)
-  [TS002 - Solar PV inputs to iQ-Energy](#)

[» See all 7 articles](#)

#### Listed Buildings (1)

-  [Quidos Guidance on Listed Buildings for Energy Assessors](#)

#### MEES (1)

-  [Energy Efficiency \(Private Rented Property\) Regulations \(also known as MEE...](#)

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