

Green Deal Advisor Checklist (Domestic)

This guidance document outlines the process for becoming an authorised (domestic) Green Deal Advisor and the necessary steps to allow you to undertake a Green Deal assessment and to lodge a domestic Green Deal Advice Report (GDAR) on the Landmark register for England and Wales and on the EPC Register for Scotland.

Summary tick list

1	Becoming a Green Deal Advisor	<input checked="" type="checkbox"/>
	a) Qualify as a Domestic Energy Assessor *	<input type="checkbox"/>
	b) Qualify as a Green Deal Advisor *	<input type="checkbox"/>
	c) Register with an EPBD body to receive your Advisor ID (also known as an Energy Assessor Number)	<input type="checkbox"/>
	d) Register with a Green Deal Assessor Organisation	<input type="checkbox"/>

*These may delivered as part of one training course

2	Registering with the Oversight and Registration Body (ORB)	
	a) Provide Assessor Organisation with your EPBD Advisor ID	<input type="checkbox"/>
	b) Ask your Assessor Organisation to register you via their Certification Body	<input type="checkbox"/>
	c) Receive Assessor Organisation ID from Assessor Organisation	<input type="checkbox"/>
	d) You will receive a confirmation email from ORB once the process has been successful. This will contain the details you need for step 3, below	<input type="checkbox"/>

3	Lodging Green Deal Advice Reports (GDARS)	
	a) Create Landmark account using the details in the confirmation email received from the ORB and The Landmark User Guide	<input type="checkbox"/>
	b) Input <u>exactly</u> the same information into the Landmark Registration website as that provided to you by the ORB	<input type="checkbox"/>
	c) Check whether EPBD accreditation scheme has updated your GD qualification to the relevant EPC Register	<input type="checkbox"/>
	d) Wait one hour after receiving login email to lodge first Assessment. Note a Landmark user name and ID will be required to use 3 rd party Occupancy Assessment software connected to the Landmark registers	<input type="checkbox"/>
	e) If you work for multiple employers, <u>each Assessor Organisation</u> must register you separately on the ORB	<input type="checkbox"/>
	f) You must then create separate Landmark accounts for each <u>using different email addresses</u>	<input type="checkbox"/>

1. **BECOMING A Green Deal Advisor (GDA)**

The Green Deal assessment is made up of two parts – the Energy Performance Certificate (EPC) which rates the property in terms of energy efficiency and gives recommendations for improvement, and the Occupancy Assessment (OA) which modifies the output of the EPC to reflect a household's actual energy use.

Green Deal Advisors need to be qualified to undertake EPCs (a Domestic Energy Assessor and active registrant of an EPBD energy assessment scheme or Approved Organisation in Scotland) and to hold a Green Deal Advisor qualification based on the National Occupational Standards (NOS)

www.assetskills.org/PropertyAndPlanning/EPBDGreenDealNOS.aspx

Training & Qualification

- a) If you are starting from scratch you will need to take a combined Green Deal Advisor and Domestic Energy Assessor qualification
- b) If you are already a Domestic Energy Assessor (qualified to undertake EPCs) you only require the Green Deal Advisor qualification

Training can take from 5 days to 6 weeks depending on your previous experience and training provider.

Find a training provider in your region by contacting the Awarding Bodies (currently City and Guilds, ABBE, EDI, BPEC and SQA). More information is available on the Asset Skills website: <http://www.assetskills.org/GreenSkills/GreenInformation.aspx>

Once you have completed your training, your training provider will arrange for an awarding body to carry out an external verification and issue you with a certificate

Post qualification you must:

- Register your Energy Advisor qualification with an EPBD body who will provide you with an Advisor ID (also known as an Energy Assessor Number)
- Sign up to an Assessor Organisation either as a full time employee or as a contractor. Green Deal Advisors can work for more than one Assessor Organisation

Note: Green Deal Advisors are unable to work directly for themselves unless they are certified as a sole trader Assessor Organisation. This is because only Assessor Organisations are directly able to be certified by a Certification Body. The Certification Bodies perform a vital quality assurance role checking the quality of the each advisor by auditing their work and ensuring they are suitably qualified and up to date with CPD requirements.

2. MANDATORY STEPS ONCE QUALIFIED

All Green Deal participants need to be registered with the Green Deal Oversight and Registration Body (ORB). The ORB's role includes maintaining a register (www.greendealorb.co.uk/assessors/assessor-search) of authorised participants and monitoring adherence to the Code of Practice and Framework Regulations.

There is no direct route for Green Deal Advisors to register with the ORB – they must go through their Assessor Organisation and their Certification Body.

For your Certification Body to register you must ensure you have done the following:

- a) Provide your data to your Assessor Organisation. This will include your Advisor ID (Energy Assessor ID) and a contact email address¹ (you will need a different email address for each Assessor Organisation)
- b) Ensure the Assessor Organisation gives you their Assessor Organisation ID.

You will receive an email from the ORB to confirm that your authorisation is complete and the data they hold on you is accurate (note this data must be replicated for the final stage, the Landmark registration). If you have any concerns about the progress of your authorisation with the ORB, you should discuss them with your Assessor Organisation.

3. LODGING GREEN DEAL ADVICE REPORTS ON LANDMARK

In order for Green Deal Advisors to lodge Green Deal Advice Reports you must also be registered on the Landmark EPC Register as a Green Deal Advisor. This is in addition to any account you hold as a DEA to lodge EPCs. Each Green Deal Advisor must do this for him/herself. The Landmark Register is for England and Wales only. The Scottish Register is expected to be in place in January. Please see section 4 for further guidance.

How to register:

Go into the Landmark User Registration System to register your details at <https://www.gdregisterregistration.com/register>. The first step is to create a new account. To do this you must enter exactly the same information which your Certification Body provided to the ORB. This will be sent to you by the ORB once authorisation is complete. This includes:

- Your personal details as required
- Your Advisor ID (same as your Energy Assessor ID).
- Your Assessor Organisation ID
- Your date of birth

¹ Please note that confirmation details will go through to this email address therefore if it is not one you have access to that you have made arrangements for the owner of that email account for forward them the confirmation and details when they arrive.

Landmark verifies your Advisor ID and that you are registered as Green Deal Advisor to ensure only appropriate advisors are granted a User ID. Landmark will also check that the register has been updated with your Green Deal qualification. To ensure there are no delays here you may wish to check with your EPDB accreditation scheme that they have updated Landmark with this information.

Outcome:

When your details are accepted you will receive an email from Landmark confirming your username and password which will allow you to lodge reports on the Landmark Register. Please allow at least 1 hour between receiving your password and lodging reports in order for the system to update itself (attempted lodgements before this time will not be successful). Landmark are in the process of automating this system, we will update you when this delay will no longer apply.

If your registration is not successful you will get an email to inform you. You should then check that the data you provided to Landmark was identical to that provided to the ORB (and confirmed to you by the ORB's authorisation email) and that your EPDB accreditation scheme has updated Landmark with your Green Deal qualification. If you are confident that neither of these issues are the reason, you should contact the ORB helpdesk on 0207 090 1031.

4. **OTHER POTENTIAL ISSUES**

Registering Multiple Accounts

- **ORB:** If you work for multiple Assessor Organisations, you will require multiple registrations with the ORB. This means that each of your Assessor Organisation(s) must complete Stage 2 of the process for you. (Note Assessor Organisation ID will vary but it is optional for Green Deal Advisors to have a separate Advisor ID for each Assessor Organisation they work for.)
- **Landmark:** Similarly you will require a separate log-in using a unique email address for each Assessor Organisation that you work for.

Accessing the EPC Register in Scotland

A Green Deal Assessor can register to access the EPC register in Scotland by sending an e-mail to ScottishEPCRegister@est.org.uk providing these details:

1. Green Deal Advisor ID (this is the same as the assessor membership number issued by the Approved Organisation you are accredited with for issuing EPCs);
2. Assessor Organisation ID (issued by the relevant Green Deal Certification Body to the certified Assessor Organisation);
3. Which software² you will be using to lodge data.

² If your software connects to the register using web services and has been approved by EST for use, your parent organisation will have received a digital certificate which will allow your software to communicate directly with the register. Please note however that you will also still need to have ensured that you have registered your information for points 1 to 3 above.

Process for Becoming a Green Deal Advisor – from training to lodging

