

Combined EPC Register for Scotland Green Deal Advisor Registration Guide

This guidance document outlines the process for becoming an authorised 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 Energy Saving Trust's Combined EPC Register for Scotland.

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 (an EPC Assessor and active registrant of an 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 EPC Assessor qualification
- b) If you are already an EPC 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 Approved Organisation who will provide you with an Advisor ID (also known as an Assessor Membership Number) and upload your EPC assessor details to the Combined EPC Register for Scotland
- 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/EPC Assessor Membership Number) and a contact email address¹.
- b) Ensure the Assessor Organisation gives you their Assessor Organisation ID. This Assessor Organisation ID is a certification ID issued to them by the Certification Body.

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 registration on the Scottish EPC Register). 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 the Combined EPC Register for Scotland

In order to lodge Green Deal Advice Reports as a Green Deal Advisor, you must also register for a Green Deal Advisor account on the Energy Saving Trust's Scottish EPC Register. Each Green Deal Advisor must do this for him/herself. The Energy Saving's Trust register is for Scotland only. You will not be able to lodge and retrieve data from the Scottish EPC Register using your Green Deal assessment software without the username and password you will receive after registering for your Green Deal Advisor account.

How to register:

Go to <https://www.scottishepcregister.org.uk/Account/GreenDealRegistration> where you will find the 'Green Deal Register User Account' registration screen. To create your account 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:

- Advisor ID (the ID provided by your Approved Organisation as an EPC assessor)
- Certification ID (the ID for your Assessor Organisation)
- UserName – decided by the advisor
- E-mail Address – please ensure you enter this correctly as your password will be sent here
- First Name
- Surname

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

- Date of Birth

You will also be required to read and accept the terms and conditions before you can finalise the registration. The register verifies your Advisor ID and that you are registered as Green Deal Advisor to ensure only appropriate advisors are granted a User ID.

When your details are accepted you will receive an automated email from admin@est.org.uk containing your temporary password. Please note that your username is the username that you chose during the registration process and is not emailed to you. **Therefore please ensure you keep a note of the username you created during the registration process.** These user credentials will allow you to connect to the Scottish EPC register using your Green Deal assessment software. Please note that it does not provide access to the Scottish EPC Register web portal at www.scottishepcregister.org.uk. You can however use the web portal to change your password and check your Green Deal Advisor account details by logging into the Green Deal Advisor Login section at <https://www.scottishepcregister.org.uk/Account/GreenDealLogin>.

If registration is not successful an error will appear on the screen. You should then check that the data you provided was identical to that provided to the ORB (and confirmed to you by the ORB's authorisation email) and that your Approved Organisation scheme has updated the Scottish register with your EPC assessor details. If you are confident that neither of these issues are the reason, you should contact the Scottish EPC Register helpdesk at scottishepc@est.org.uk. Please advise in your email that you are trying to complete the Green Deal Registration process and supply the error message that you received during registration.

Please note that your username and password are individual to you as an advisor. The advisor is personally responsible for the usage made from their Green Deal Advisor account and under no circumstances should a Green Deal Advisor share their username and password with any other individual or organisation. The Energy Saving Trust reserves the right to withdraw or disable any Green Deal Advisor user account without prior warning if it believes that access is being abused or is not in accordance with Regulations, terms and conditions, or the law.

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.)
- **EST:** Similarly you will require a separate log-in for each Advisor ID you are using to lodge Green Deal assessments.

Summary tick list

1	Becoming a Green Deal Advisor	<input checked="" type="checkbox"/>
	a) Qualify as an EPC Assessor in Scotland *	<input type="checkbox"/>
	b) Qualify as a Green Deal Advisor *	<input type="checkbox"/>
	c) Register with an Approved Organisation in Scotland to receive your Advisor ID (same as an Assessor Membership Number used for lodging EPCs).	<input type="checkbox"/>
	d) If you are an existing EPC assessor your Green Deal Advisor ID is the same as your existing Assessor Membership Number used for lodging EPCs.	
	e) 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 Advisor ID (see 1 c above)	<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 the 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) on the EST's Scottish EPC Register	
	a) Create a Green Deal Advisor login using the details in the confirmation email received from the ORB and the EST's Green Deal Advisor Registration Guide. The Green Deal Advisor login is required to use 3 rd party Occupancy Assessment software connected to the EST Register	<input type="checkbox"/>
	b) Input <u>exactly</u> the same information into the EST Registration page as that provided to you by the ORB. Take a note of your username	<input type="checkbox"/>
	c) Upon successful registration, the EST Register password will be sent to the email address you have registered with during step b	
	d) If you work for multiple employers, <u>each Assessor Organisation</u> must register you separately on the ORB	<input type="checkbox"/>

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

