

BRE TECHNICAL UPDATE

ISSUE 012 – MARCH 2010



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SOFTWARE UPDATES – SUNDAY 7th MARCH 2010

Confirmation has now been received that the non-domestic software and Register updates previously due late January will now take place on Sunday 7th March 2010.

The updates will affect all SBEM (non-domestic EPC) and ORCalc (DEC) approved software interfaces and lodgements to the Non-Domestic Registers for England & Wales and for Northern Ireland.

All SBEM (non-domestic EPC) and ORCalc (DEC) approved software interfaces will have been updated ready for the official go-live on 7th March 2010.

Check with your software provider for when the updated software will be available to download/install.

For iSBEM visit the NCM website (www.ncm.bre.co.uk) – the new version 3.5.a (March 2010) is ready to download.

For ORCalc visit the Building Energy Calculation Software Approval Scheme (BECSAS UK) [website](http://www.becsas.co.uk) the new version will be available to download by the end of Friday 5th March 2010.

As with previous updates, once the Registers have been updated on Sunday 7th March 2010, you will only be able to lodge a Non-domestic EPC or DEC to the Register if you are using the new version of the software.

Do not attempt to lodge to the Non-domestic Registers with the new version of the software until after the Sunday 7th March update has been completed.

Both the Domestic and Non-Domestic Registers (for England & Wales and for Northern Ireland) will be unavailable on Sunday 7th March from midnight to at least 16.00. No lodgements should be attempted during this time.



Conventions

A revised set of domestic EPC (RdSAP) conventions and additional Addenda have been agreed and are due to come into force from Monday 29th March 2010.

An initial set of Non-domestic EPC (SBEM) conventions have been agreed and are due to come into force in early May 2010.

A set of On Construction (SAP) EPC conventions are currently under review and likely to be agreed ready to come into force with the new SAP 2009 software due in October 2010.

Full details of all conventions and any related Addenda will be provided on our website before the end of March 2010 (end of September for SAP).



Quality · Integrity · Reliability

CONTACTS:

HI/DEA Accreditation Scheme Manager
Bucknalls Lane, Garston Watford WD25 9XX
T: 0845 863 0014
E: enquiries@breassessor.co.uk
E: enquiries@breinspector.co.uk

HI/DEA AND SAP ENERGY ASSESSOR GUIDANCE

Following feed back from members and particularly the DEA forum workshop held in November 2009, a number of enhancements have been made to the Q-SAP software

1. Enhanced Q-SAP (RdSAP) software

Following feed back from members and particularly the DEA forum workshop held in November 2009, a number of enhancements have been made to the Q-SAP software for producing EPCs for existing dwellings (RdSAP).

The enhanced software is due to be loaded onto the Quest system in mid March 2010. Members will be notified of the exact date of the release by email at least 24 hours earlier. Any existing unlodged EPCs will be automatically updated when you click the 'Calculate' button.

A summary of the key enhancements and new features:

- Option to view data input screens in 'Tabs' view or original continuous scroll view
 - System remembers your preference on exit
- The Sheltered Factors sections has been inserted towards the top after the Property Overview section
 - Validation checks now link property type with both Shelter Factors and 'Ground floor type'
- New calendar icon to easily add the 'Inspection date'
 - Calendar defaults to the current date
- All numerical fields are now fully formatted with the upper range extended:
 - Habitable rooms (1-99)
 - Heated habitable rooms (1-99)
 - Floor number (0-98)
 - Stories in block (1-99)

- Open fire places (0-99)
- Percentage multiple glazed (0-100%),
- Photovoltaic cells (0-100%)
- Low energy lights (0-100%)
- Measurement fields have been formatted to 2 decimal places only – although a high level of accuracy can be recorded in site notes
- Alternative Wall section is now located towards the end within the Other Details section above 'Utilities'
- Revised drop-down options and validation for the 'Basis of Certificate' and 'Sampling approach' fields
 - No longer a option to use 'Data gatherer's data'
- Within the Main, Extension 1 and Extension 2 measurements sections there are new buttons ('Same as above') to quickly enter data for floors that have exactly the same values as the entries for the floor below
- Within the Heating section, when you clear or update the type of system field, the fuel and controls fields are also cleared or refreshed
- The following fields now have default values automatically entered:
 - Basis of Certificate – defaults to 'Full Survey by you'
 - Sampling approach – defaults to 'None (full survey)'
 - Fuel (Main, Secondary and Water heating) automatically filled if only one option available for the system selected (usually electricity or oil)
 - Conservatory type – defaults to 'No conservatory'
 - Solar water heating panel – defaults to 'No'
 - Mains gas supply present – defaults to 'Yes' if a mains gas fuel appliance is entered for the Main, Secondary or Water heating
 - Photovoltaic cells – defaults to '0%'
 - Wind turbines - defaults to 'No'

BRE has also taken this opportunity to make some further refinements to Q-SAP with additional validation and enhanced error messages.

A revised Quest User Manual (PDF) will be available from within the [Members' Area](#), together with updated fieldsheets and Heating code sheets.

Due to come into force on Monday 29th March 2010, the new conventions will add to the initial set that came into force on Monday 18th October 2009.

2. New and revised RdSAP conventions and Addenda

Following agreement between BRE and other represented DEA Accreditation Schemes, CLG has released a further set of RdSAP conventions and revised Addenda.

Due to come into force on Monday 29th March 2010, the new conventions will add to the initial set that came into force on Monday 18th October 2009. There will also be two new Addenda items, as well as revisions to two existing items.

A further revised version of Appendix S will also be released on the SAP 2005 website the week before the release.

Full details of all the changes and documents will be available from our website from 19th March 2010. These changes will also form part of the half day CPD seminars planned between 23rd and 31st March 2010 (for full details and locations see the [training](#) section), together with a demonstration of the enhanced features of the latest version of the Q-SAP software.

3. New CLG audit requirements

CLG have announced new tighter audit requirements for Domestic Energy Assessors to be applied by all Accreditation Schemes. Due to be applied from 1st March 2010, the proposed new requirements will affect all DEA members and all Accreditation Schemes.

Two of the more immediate impacts of requirements are as follows:

- Explicit new rules on the procedures for site notes audits
 - 95% of lodgements to be within 5 SAP points of the “truth”
 - EPCs are deemed to be defective and must be replaced if any one of the following conditions is met:
 - The sum of the absolute errors greater than 5 SAP points
 - The wrong recommendations are made
 - The building’s description is ‘sufficiently inaccurate’
 - All EPCs must be evidence based
 - Sufficient photographs and notes must be retained and submitted.
- Increase in the level of routine (random) and responsive (targeted) audits
 - Overall minimum rate of 2% of all RdSAP lodgements
 - Minimum of 1% site notes audit per member
 - Minimum of 1 audit per quarter per member
 - Higher audit rates for recent members
 - Additional audits for those who fail audit checks.

At the time of publication, CLG’s requirements had not formally been adopted nor a date set of their implementation. However, all Schemes are now required to submit a monthly summary report to CLG from April based on RdSAP EPC lodgements from 1st March 2010. Consequently, BRE will start to apply the relevant parts of the CLG requirements from 1st March 2010.

It is therefore important that sufficient colour photographs detailing all the RdSAP relevant features of the dwelling are submitted with every audit request. Photographs should be date stamped when taken.

Failure to provide sufficient evidence of how you determined the features of a dwelling will result in an audit failure – audit failures will lead to higher rates of auditing, with persistent audit failures leading to an automatic suspension.

For the current BRE advice on photographs see the BRE document in the Members’ Area of our website. Further reviews are being undertaken of the audit requirements for the other Energy Assessor Schemes and similar new audit requirements are likely for these strands.

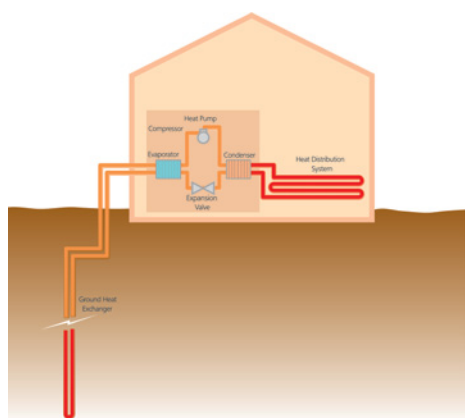
CLG have announced new tighter audit requirements for Domestic Energy Assessors to be applied by all Accreditation Schemes.



Failure to provide sufficient evidence of how you determined the features of a dwelling will result in an audit failure – audit failures will lead to higher rates of auditing, with persistent audit failures leading to an automatic suspension.

A new (or newly constructed/converted) dwelling completed on or after 6th April 2008 that has an initial full SAP EPC must always be assessed in the future using the full SAP methodology.

It has recently been announced that performance data for specific heat pumps can now be used in SAP 2005 calculations via Appendix Q.



4. CLG clarification on full SAP EPCs

After almost two years of pressure from BRE and other Schemes, CLG has finally secured a decision on the question of “once full SAP always full SAP”.

The decision is in two parts as follows:

New dwellings

A new (or newly constructed/converted) dwelling completed on or after 6th April 2008 that has an initial full SAP EPC must always be assessed in the future using the full SAP methodology.

Existing dwellings

Even if the current or previous owner of an existing dwelling, completed or converted before 6th April 2008, has elected to have a full SAP EPC produced for their dwelling, RdSAP remains the approved methodology for existing dwellings unless a full SAP EPC is requested.

BRE has always maintained that this is the sensible approach to EPCs going forwards, but it does mean that more care is need to prevent RdSAP EPCs being lodged on dwellings that must have a full SAP EPC only – CLG are working with Landmark put in place checks at point of lodgement.

5. SAP Appendix Q – heat pumps

It has recently been announced that performance data for specific heat pumps can now be used in SAP 2005 calculations via Appendix Q.

There is a spreadsheet on the Appendix Q website (www.sap-appendixq.org.uk) for calculation of the Appendix Q adjustments for inclusion in full SAP assessments. Currently, there are 10 heat pump systems listed (www.sap-appendixq.org.uk/page.jsp?id=4), others will be added in due time.

The range of technologies currently assessed via Appendix Q is listed below:

- Mechanical Ventilation systems (MEV & MVHR)
- Flue Gas Heat Recovery Systems (FGHRS)
- Waste Water Heat Recovery Systems (WWHRS)
- Hot Water Only Boilers
- Heat Pumps
 - Air source (air to water)
 - Ground Source (water to water)
 - Exhaust Air Source (air to water & air to air).

Refer also to the Appendix Q: Special features and specific data section of the SAP 2005 document (October 2009), page 86.

CONTACTS:

HI/DEA Accreditation Scheme Manger:

enquiries@breassessor.co.uk
enquiries@breinspector.co.uk
invoicing@breassessor.co.uk
CPD@breassessor.co.uk
 0845 863 0014

HI/DEA Accreditation Scheme Auditor:

EPCaudit@bre.co.uk
HCRaudit@bre.co.uk
 0845 863 0014

RdSAP Helpdesk:

RdSAP@breassessor.co.uk

TRAINING & CPD

BRE Training has planned a series of regional RdSAP Update Seminars for Spring 2010 for Domestic Energy Assessors to coincide with proposed release of new conventions and Addenda at the end of March 2010.

Please refer to our website www.bre.co.uk/training for announcements and full details of topics, dates and venues for all BRE training and CPD courses.

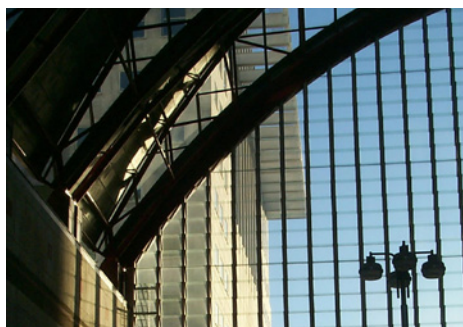


Seminars and courses	CPD Hours	Venue	Date (2010)		Time
March 2010					
The Duty to Manage Asbestos Containing Materials in Non-Domestic Premises -	–	BRE, Watford	Wednesday	17 March	0900 – 1630
Level 3 Diploma in On Construction New Build Dwellings (SAP) Energy Assessment - JPA	–	BRE, Watford	Tuesday-Thursday	23-25 March	0900 – 1700
RdSAP Update & CPD Seminar (DEA & HI)	3	BRE, Watford	Tuesday	23 March	0900 – 1230
RdSAP Update & CPD Seminar (DEA & HI)	3	University of Sheffield	Wednesday	24 March	0900 – 1230
RdSAP Update & CPD Seminar (DEA & HI)	3	UWE, Bristol	Thursday	25 March	0900 – 1230
RdSAP Update & CPD Seminar (DEA & HI)	3	SERC, Northern Ireland	Monday	29 March	1300 – 1630
RdSAP Update & CPD Seminar (DEA & HI)	3	BRE, Watford	Wednesday	31 March	0900 – 1230
April 2010					
New Build Dwellings SAPPER software Training for experienced Energy Assessment (SAP)	6	BRE, Watford	Tuesday	13 April	0900 – 1630
Asbestos Awareness Training	2	BRE, Watford	Wednesday	14 April	0900 – 1230
Diploma in Non-domestic Energy Assessment (SBEM-EPC) Level 3	-	BRE, Watford	Monday-Friday	19-23 April	0900 – 1700
Diploma in Non-domestic Energy Assessment (SBEM-EPC) Level 4	–	BRE, Watford	7 days	19-23, 26 & 27 April	0900 – 1700
Introduction to Renewables	4	BRE, Watford	Monday	19 April	0900 – 1630
Introduction to Solar Photovoltaics	2	BRE, Watford	Tuesday	20 April	0900 – 1630
Introduction to Solar Thermal	2	BRE, Watford	Wednesday	21 April	0900 – 1630
Introduction to Heat Pumps	2	BRE, Watford	Thursday	22 April	0900 – 1630

Remember to complete and record your required CPD (10 hours for Energy Assessors, plus a further 10 hours for Home Inspectors per year) and ensure your '[My CPD](#)' page within the Members' Area is updated regularly.

Item	Publications /CPD material	CPD Hours	Link
1.	Technical Update Issue 012	0.5	Members' Area
2.	Quest Q-SAP User manual	1.0	Members' Area
3.	SAP Appendix Q – heat pumps	1.0	www.sap-appendixq.org.uk
4.	A User Guide to iSBEM (v3.5.a)	2.0	www.ncm.bre.co.uk
5.	A Technical Manual for SBEM (v3.5.a)	1.0	www.ncm.bre.co.uk

NON-DOMESTIC ENERGY ASSESSOR & DEC GUIDANCE



The Non-domestic EPC and DEC software is now due to be updated on Sunday 7th March 2010. Once the Landmark Registers have been updated you will only be able to lodge with the new versions of the software.



A DEC and/or AR can only be produced by an Accredited Assessor for Public Buildings who knows the building and must have visited the building for the purpose of producing a DEC and/or AR.

NON-DOMESTIC ENERGY ASSESSOR & DEC GUIDANCE

1. Proposed Software changes for 7 March 2010

The Non-domestic EPC and DEC software is now due to be updated on Sunday 7th March 2010. Once the Landmark Registers have been updated you will only be able to lodge with the new versions of the software.

Please ensure you download and use only the new version of the software from 8th March.

The most visible changes to both sets of software are the pre-set list of options for the 'Related Party Disclosure' question and the new 'Transaction type' question.

The transaction type is required for CLG purposes only and has no impact on the rating. However, the same duty of care is required for each and every lodgement to the Register whatever the reason for a certificate and/or report being issued.

2. DEC's – Audit requirements

A reminder of the audit requirements to retain and submit sufficient evidences for all DEC lodgements, irrespective of whether you are lodging the original DEC/AR or a DEC for a subsequent year.

A DEC and/or AR can only be produced by an Accredited Assessor for Public Buildings who knows the building and must have visited the building for the purpose of producing a DEC and/or AR.

It is vital that Assessors record and retain sufficient evidence of their visit to the building(s) and are able to produce this for each and every audit request. This evidence must include:

- Layout plans for every level of each qualifying building,
- A schedule of measurements and areas (GIA m²) for all conditioned and unconditioned parts of the building,
- Evidence of any sub-metering,
- Consumption records for all fuel types used, and
- Sufficient internal and external photographs.

There is no mandatory requirement to re-visit the building if producing a second or subsequent years DEC provided:

- You are satisfied that nothing has changed from the previous year,
- You have all the necessary evidences from your original visit to the building(s), and
- You submit the required evidences for audit when requested.

If you personally were not the one who issued the original or previous years DEC, then you must visit the buildings to record the relevant features, make adequate notes, have accurate plans & measurements and take sufficient internal & external photographs.

Please refer to the '[My audit](#)' section of our website for more details.

Due to come into force in May 2010, the new conventions set out the new thresholds for determining if a non-domestic building is a Level 3, Level 4 or Level 5.

3. New SBEM conventions due May 2010

Following agreement between BRE and other represented Non-domestic Accreditation Schemes, CLG has released an initial set of Non-domestic EPC conventions.

Due to come into force in May 2010, the new conventions set out the new thresholds for determining if a non-domestic building is a Level 3, Level 4 or Level 5.

Full details of all the changes and documents will be available from our website by the end of March 2010.

4. A User Guide to iSBEM 3.4.a

An updated version of A User Guide to iSBEM was released on 2nd March 2010. This update coincides with the release of the new iSBEM v3.5.a software required for all non-domestic EPC lodgements after the Sunday 7th March 2010 update.

The key changes from the previous version of the Guide are:

- Further guidance - Further explanation or clarification of existing parameters and functionality
 - Additional guidance on definitions and rules covering: zoning, the multiplier parameter, for no HVAC, solar energy systems, CHP generators, etc.
- New features and functionality
 - New drop-down menu for the related party disclosure parameter in the General form
 - New parameter for transaction type in the General form
 - New 'About iSBEM' form displays the licensing conditions for the software (Section 5.1 – page 43)
 - New option of "Same space" for the parameter "Connects space to" (Envelope tab)
 - New parameters and sub-tabs for a range of Solar Energy Systems (SES tab) and Storage & Secondary Circulation (HWS tab).

To convert previous versions of nct files, follow the guidance in Appendix B (pages 211-214).

The PDF version of the Guide can be downloaded from the [NCM website](#).

5. A Technical Manual for SBEM 3.5.a

An updated version of the SBEM Technical Manual was released on 2nd March 2010. This updates the version issued in October 2009 and reflects the methodology for SBEM version 3.5.a released in March 2010.

The key changes from the previous version of the manual are:

- Modified storage losses calculation in water heating energy calculation (Section 4.3.1).
- Modified water heating energy consumption calculation (Section 4.8).
- Modified solar energy systems calculation (Section 4.9)
- Modified photoelectric control for lighting (Section 4.4.4.2)

The PDF version of the manual can be downloaded from the [NCM website](#).

NON-DOMESTIC ENERGY ASSESSOR CONTACTS:

**ACCREDITATION SCHEME
MANAGER:**
enquiries@breassessor.co.uk
invoicing@breassessor.co.uk
CPD@breassessor.co.uk
0845 863 0014

**ACCREDITATION SCHEME
AUDITOR:**
EPCaudit@bre.co.uk
0845 863 0014

NON-DOM EPC AND DEC SUPPORT:
www.communities.gov.uk/epbd
www.ncm.bre.co.uk
nondomEPC@breassessor.co.uk
DECsupport@breassessor.co.uk