

# Green Deal Advisor Checklist for England and Wales (Domestic and Non-Domestic)

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This guidance document outlines the process for becoming a Green Deal Advisor (domestic/ non-domestic) and the necessary steps to allow you to undertake a Green Deal assessment and to lodge a Green Deal Advice Report (GDAR) on the Green Deal Register for England and Wales. Please see Annex A for the Green Deal Advisor Registration Process diagram.

The Green Deal Register in England and Wales is currently operated by Landmark. In order to complete the registration process on the Green Deal Register, you will also need The Green Deal Advisor Landmark Registration Guide (available at <http://gdorb.decc.gov.uk/assessors/assessor-guidance>)

A separate Green Deal Advisor Guide for Scottish EPC Register is available from the Green Deal Oversight and Registration Body (GD ORB) website at <http://gdorb.decc.gov.uk/assessors/assessor-guidance>.

## Summary tick list

<b>1</b>	<b>Becoming a Green Deal Advisor and Registering with Green Deal Assessor Organisation (Assessor Organisation)</b>	<input checked="" type="checkbox"/>
a)	Qualify as a Domestic Energy Assessor (DEA) or Non-Domestic Energy Assessor (NDEA) in England and Wales*.	<input type="checkbox"/>
b)	Qualify as a Green Deal Advisor*.	<input type="checkbox"/>
c)	Register with an Energy Performance of Buildings Directive (EPBD) accreditation scheme in England and Wales to receive your Green Deal Advisor ID (same as an Energy Assessor Number).	<input type="checkbox"/>
d)	If you are an existing energy assessor, ask your EPBD accreditation scheme to update your Green Deal Advisor qualification on the EPC Register. Your Green Deal Advisor ID is the same as your existing Energy Assessor ID.	<input type="checkbox"/>
e)	Register with an Assessor Organisation or become certified as sole trader Assessor Organisation.	<input type="checkbox"/>

\*These may be delivered as part of one training course

<b>2</b>	<b>Registering with the GD ORB</b>	<input checked="" type="checkbox"/>
a)	Provide your Assessor Organisation with your Green Deal Advisor ID (see 1 c/ d 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 GD ORB once the process has been successful. This will contain the details you need for step 3, below.	<input type="checkbox"/>
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<b>3 Lodging Green Deal Advice Reports (GDARs) in the Green Deal Register</b>	<input checked="" type="checkbox"/>
a) Create Landmark account using the details in the confirmation email received from the GD ORB and the Green Deal Advisor Landmark Registration Guide.	<input type="checkbox"/>
b) Input <u>exactly</u> the same information into the Landmark Registration website as that provided to you by the GD ORB.	<input type="checkbox"/>
c) Check whether EPBD accreditation scheme has updated your Green Deal Advisor qualification in the EPC Register.	<input type="checkbox"/>
d) Upon successful registration, Green Deal Register username and password will be sent to the email address you have registered (see 3 a).	<input type="checkbox"/>
e) Wait one hour after receiving login email to lodge first GDAR. Note a Landmark user name and ID will be required to use 3 <sup>rd</sup> party Occupancy Assessment software connected to the Green Deal Register.	<input type="checkbox"/>
f) If you work for multiple employers, <u>each Assessor Organisation</u> must register you separately on the GD ORB.	<input type="checkbox"/>
g) You must then create separate Landmark accounts for each <u>using different email addresses.</u>	<input type="checkbox"/>

## **1. BECOMING A GREEN DEAL ADVISOR AND REGISTERING WITH AN ASSESSOR ORGANISATION**

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 (be a qualified Domestic/ Non-Domestic Energy Assessor and active registrant of EPBD accreditation scheme) and to hold a Green Deal Advisor qualification based on the National Occupational Standards (NOS): [www.assetskills.org/PropertyAndPlanning/EPBDGreenDealNOS.aspx](http://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/ Non-Domestic Energy Assessor qualification;
- b) If you are already a Domestic / Non-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 Assessor qualification with an EPBD accreditation scheme who will provide you with an Advisor ID (also known as an Energy Assessor Number); and
- 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/ sole traders not individuals can be certified by a Certification Body.

## **2. MANDATORY STEPS ONCE QUALIFIED**

All Green Deal participants need to be registered with the GD ORB. The GD ORB's role includes maintaining a register ([www.greendealorb.co.uk/assessors/assessor-search](http://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 GD 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 Green Deal Advisor ID (Energy Assessor ID) and a contact email address<sup>1</sup> (you will need a different email address for each Assessor Organisation; and
- 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 GD 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 – registration with Landmark). If you have any concerns about the progress of your authorisation with the GD ORB, you should discuss them with your Assessor Organisation.

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<sup>1</sup> 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.

### **3. LODGING GREEN DEAL ADVICE REPORTS ON THE GREEN DEAL REGISTER (England and Wales)**

In order for Green Deal Advisors to lodge GDARs you must also be registered on the Green Deal Register as a Green Deal Advisor. This is in addition to any account you hold as a Domestic/ Non-Domestic Energy Assessor to lodge EPCs. Each Green Deal Advisor must do this for him/ herself. The Green Deal Register, operated by Landmark, is for England and Wales only.

#### 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 GD ORB. This will be sent to you by the GD 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.

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 GDA qualification. To ensure there are no delays here you may wish to check with your EPBD 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 one 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 GD ORB (and confirmed to you by the GD ORB's authorisation email) and that your EPBD accreditation scheme has updated Landmark with your Green Deal Advisor qualification.

If you are confident that neither of these issues are the reason, you should contact the Landmark on: [greendeal@landmark.co.uk](mailto:greendeal@landmark.co.uk)

#### 4. OTHER POTENTIAL ISSUES

##### Registering Multiple Accounts

- **GD ORB:** If you work for multiple Assessor Organisations, you will require multiple registrations with the GD 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.

**Annex A: Green Deal Advisor Registration Process**

