



Unit and Assessment Specification

Unit title	Undertake Occupancy Assessments and Give Advice
SQA Code	H1V3 04
SCQF Level	
SCQF Credit Points	
SSC Ref	ASTGDA2

History of changes

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Title		Undertake Occupancy Assessments and Give Advice.	
Learning Outcomes		Assessment Criteria	
The learner will:		The learner can:	
1	Understand the process of conducting an occupancy assessment.	1.1	Identify the range of data that is required from the customer to enable an occupancy assessment as defined by the prescribed methodology.
		1.2	Explain the methods used to obtain data and information and the potential sources of that information.
		1.3	Summarise how to carry out a methodical visual on-site inspection of a property in order to carry out an occupancy assessment.
		1.4	Identify the requirements of the prescribed methodology for the occupancy assessment.
		1.5	Specify the definitions and conventions that apply to the prescribed methodology for occupancy assessment.
		1.6	Identify the requirements of Codes of Practice or other guidance applying to the home visit.
		1.7	Describe how to identify gaps in information gathered and any additional data required to fill them.
		1.8	Explain the data protection requirements relating to customer's data.
		1.9	Identify the features of a property that may indicate that RDSAP is an inappropriate methodology for energy assessment.
		1.10	Describe how to assess the likely current energy performance of any property elements compared to its performance as originally built.
		1.11	Identify the performance and durability of materials and systems over time.
		1.12	Describe the functioning of building services where this relates to energy performance.
2	Understand the methods of reducing energy consumption and achieving affordable warmth.	2.1	Explain how to establish and clarify the needs, circumstances, motivations and capabilities of customers regarding energy consumption.
		2.2	State the definition of a household in Fuel Poverty and explain how to recognise households at risk of it .

	<p>2.3 Identify the types of poor health typically associated with energy inefficient housing.</p> <p>2.4 Identify the limits of own expertise in relation to fuel poverty and possible health outcomes.</p> <p>2.5 Describe the sources of help and advice available for those at risk of fuel poverty or poor health associated with energy inefficient housing.</p> <p>2.6 Identify the features of a property and the occupier's behaviours that encourage mould growth and condensation.</p> <p>2.7 Describe the indicators of under heating of a property and their implications for the occupancy assessment.</p> <p>2.8 Identify the financial and other constraints that may affect the customer's ability to act.</p> <p>2.9 Identify the sources of financial support available to customers including Green Deal finance and the Energy Company Obligation measures.</p> <p>2.10 Identify the opportunities for the installation of energy efficiency measures.</p> <p>2.11 Describe the different tenures in operation within different parts of the property market and the implications for occupancy assessment.</p> <p>2.12 Summarise the landlord's compliance with legislation and obligations regarding responsibilities for property standards, energy efficiency in housing.</p> <p>2.13 Explain how the occupier's use of installed appliances, systems and controls affects overall energy efficiency and fuel bills.</p> <p>2.14 Identify the efficient, safe and appropriate use of appliances, systems and controls and how these can be demonstrated to customers.</p> <p>2.15 Describe the main methods and products used for controlling and managing:</p> <ul style="list-style-type: none"> ◆ the use of water and minimising waste ◆ waste reduction, re-use and re-cycling
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		<p>2.16 Identify the limitations on advice given.</p> <p>2.17 Describe the types of questions, issues and concerns that customers might have about the home visit and the occupational advice given.</p> <p>2.18 Identify the sources of information to which the customer can be referred for further help and advice.</p>
3	Understand written records required for Inspection findings.	<p>3.1 Summarise the methods, formats and conventions for recording information and evidence on the occupancy assessment.</p> <p>3.2 Identify the information and evidence relating to the home visit as defined by the current occupancy assessment methodology and associated guidance and conventions.</p> <p>3.3 Define the level of detail required to produce a complete and comprehensive Green Deal Advice report.</p> <p>3.4 Explain how records can be used to justify decisions on the values recorded and the advice given.</p> <p>3.5 Identify the circumstances in which records can include the fact that information is 'unknown' and the evidence required to support this choice.</p> <p>3.6 Explain the importance of storing information and records securely for future access and to meet Certification Scheme inspection requirements.</p> <p>3.7 Explain the role and obligations of Certification schemes in respect of auditing records of inspection findings.</p>
4	Be able to conduct an occupancy assessment.	<p>4.1 Explain to customers the information they will need to provide for the occupancy assessment.</p> <p>4.2 Use appropriate methods to obtain such information from customers, such as face to face questioning, telephone interviews, customer completion questionnaires and observing the customer during the home visit.</p> <p>4.3 Confirm that the customer is the person responsible for the property's fuel bills and has the authority to take action under the Green Deal.</p> <p>4.4 Establish the appropriateness of the use of the SBEM methodology and software for the type of building and whether the DSM methodology should be used instead.</p>

	<p>4.5 Gather the necessary data and information from appropriate documentation to enable the occupancy assessment to take place.</p> <p>4.6 Establish that the RDSAP methodology is appropriate for identifying Green Deal energy efficiency measures in the property.</p> <p>4.7 Undertake a methodical visual inspection of the property in accordance with the prescribed methodology for the occupancy assessment.</p> <p>4.8 Make judgements about how the current condition of the property may affect its energy performance.</p> <p>4.9 Check for the presence of Carbon Monoxide Detectors in the property and if present, seek confirmation that they are working.</p>
<p>5 Be able to explain to customers methods of reducing energy consumption and achieving affordable warmth.</p>	<p>5.1 Establish the needs, circumstances, motivations and capabilities of the customer in relation to energy consumption reduction.</p> <p>5.2 Identify any constraints that might affect the customer's ability to act.</p> <p>5.3 Have regard to the customer's needs, abilities and capabilities when giving advice.</p> <p>5.4 Provide the customer with information about potential funding and financial support available to them.</p> <p>5.5 Recognise instances of fuel poverty and poor environmental conditions associated with energy inefficient housing and poor health.</p> <p>5.6 Advise customers affected by fuel poverty and poor environmental conditions about the sources of help and advice available to them.</p> <p>5.7 Explain to customers how their current use of appliances, systems and controls affects their energy consumption, fuel bills, thermal comfort and risk of condensation.</p> <p>5.8 Explain to customers the importance of efficient, safe and appropriate use of fixed appliances, systems and controls.</p> <p>5.9 Provide information on the methods and products for achieving:</p> <ul style="list-style-type: none"> ◆ the efficient management of water usage and minimisation of waste ◆ reduction, re-use and re-cycling of waste

	<p>5.10 Identify any intended future work on the property and its implications for recommendations made.</p> <p>5.11 Advise the customer of the limitations on the advice given.</p> <p>5.12 Respond to customer queries, issues and concerns about the home visit and the occupational advice given.</p>
<p>6 Be able to maintain written records of inspection findings.</p>	<p>6.1 Create and maintain complete, accurate and legible records of findings including:</p> <ul style="list-style-type: none"> ◆ investigations carried out ◆ values recorded ◆ options considered <p>6.2 Use records and findings to produce a complete and comprehensive Green Deal Advice report.</p> <p>6.3 Justify decisions on how values were arrived at and the nature of the advice given using collated records.</p> <p>6.4 Record clearly where information cannot be obtained and where data is recorded as unknown and why this action was unavoidable.</p> <p>6.5 Catalogue, secure and store records for the prescribed periods of time.</p> <p>6.6 Ensure that records can be accessed for future use.</p>

Additional information about the Unit
Unit purpose and aim(s)
This Unit is about carrying out home visits to carry out an occupancy assessment and give advice on reducing energy use.
Details of the relationship between the Unit and relevant national occupational standards (if appropriate)
Developed from Asset Skills National Occupational Standards
Details of the relationship between the Unit and other standards or curricula (if appropriate)
Assessment requirements specified by a sector or regulatory body (if appropriate)
Please refer to Asset Skills Assessment Principles at www.assetskills.org

Assessment (evidence) Requirements
Guidance on Instruments of Assessment