

Evidence Matrix Questions

Ref Number	Question	Answer	Yes/no
1.1.4	A potential client requests for an EPC to be carried out. You are unable complete the assessment at the time requested. How would you go about re-arranging for a more suitable time?	<ul style="list-style-type: none"> • Phone client • Letter • Voicemail • Offer alternatives • Liaison 	
1.1.5	There may be times at which a client disputes recommendations made through the EPC assessment. How would you approach the situation to minimise offence and maintain respect?	<ul style="list-style-type: none"> • Polite • EPC is software produced • Recommendation, not a must. 	
1.1.6	How would you respond to a written/verbal complaint?	<ul style="list-style-type: none"> • Two stage complaints procedure • Written response • Complaints policy 	
1.2.3	List the regular checks you would make on equipment prior to survey?	<ul style="list-style-type: none"> • Camera • Batteries • Tape measure • Ladder • Check list 	
1.2.6	There may be occasions when carrying out an assessment when prompt, effective, and efficient action may be required. It may be an instance in which your personal safety is threatened. Can you name an example and state the action taken?	<ul style="list-style-type: none"> • Gas smell • Leave property immediately • Point of contact • Ensure personal safety 	

1.2.7	It is important to be aware that interruptions can hinder work progress. Can you name three measures which may be taken to reduce interruption and digression?	<ul style="list-style-type: none"> • Phone switched off • Quiet work space • Designated times • Focused work 	
1.2.8	There may be times when assessment times clash or travelling times hinder appointment punctuality. How would you review your diary and go about rescheduling arrangements if required?	<ul style="list-style-type: none"> • Daily & weekly review of efficiency • Consider logistics of upcoming 	
1.3.1-2	It is important to set goals, review work performance and chart personal development on a regular basis. How would you go about making this a part of your professional practice?	<ul style="list-style-type: none"> • Set objectives for fixed period based on targets • Take time to have regular review of practice, how are we meeting objectives • Use review to amend objectives 	
1.3.2	What are the benefits of setting and reviewing objectives? What do they highlight that will aid future progress?	<ul style="list-style-type: none"> • Objectives give clear plans/intentions • Review allows monitoring • Highlights what has and hasn't been met to date • Focus on those not met 	

1.3.3-8	<p>Personal development is an important part of working as a DEA. It is essential to keep up to date with industry changes, strive to develop learning and use feedback to improve professional practice.</p> <p>What methods can you use to ensure continued development of learning and good practice?</p> <p>Think about</p> <ol style="list-style-type: none"> 1. Internet resources/books/further training 2. Who may be able to assist further learning 3. Monitoring and recording improved learning 4. Where to gain professional feedback 5. How to use feedback constructively. 	<ul style="list-style-type: none"> • Use websites provided through Rigmaden to keep up to date with industry changes that may impact domestic energy assessment. • Consider further vocation training courses to expand areas of expertise, i.e. valuation. • Skills scan and logging efforts made to develop knowledge and understanding. • Review learning on regular basis • Peer review • Identify positives and areas of improvement and write into objectives at next appraisal. 	
1.3.9	<p>A skills scan has been provided by Rgmaden as an example of how to audit personal development. What information is recorded on this scan and how can it be beneficial. How do you intend to use this method?</p>	<ul style="list-style-type: none"> • Skills scan records perception of competencies at intervals. • Regular skills scan allows monitoring of progress. • Build into appraisals 	
1.4.3	<p>When completing an EPC, your approach to a client should be professional and courteous. Can you give a few examples to describe how you would go about doing this?</p>	<ul style="list-style-type: none"> • Introductions • Identification • Answer questions where appropriate • Give recommendations and explain. • Leave contact details. 	

1.4.5	At times, clients may attempt to influence your judgement when carrying out an EPC. Think of reasons why they may try to influence assessment, and how you would deal with such efforts?	<ul style="list-style-type: none"> • Outcome of EPC may affect house sales/values • Lack of knowledge may cause concern for client • Politely explain purpose of EPC. • Inform that data collection and software is responsible for outcomes. • Only recommendations • Some houses may have limits to improvement 	
1.4.6	If this pressure escalates and leads to a conflict of interest, how would you deal with this issue?	<ul style="list-style-type: none"> • Notify of two stage complaints procedure 	
1.4.7	How would you record and audit these incidents of conflict?	<ul style="list-style-type: none"> • Log incident • Review 	
2.1.5	Carrying out an EPC can expose DEA's to potential hazards. How do you intend to reduce health and safety incidents and can you think of instances whereby emergency procedures may need to be followed to ensure the safety of self and others.	<ul style="list-style-type: none"> • Health and safety policy • Checklists • Risk avoidance • Gas leak, open door, unstable loft. • Vacate house where possible, inform client and ring emergency services if required. 	
2.1.6	How do you intend to inform new and current employees of up to date health and safety guidelines?	<ul style="list-style-type: none"> • Policy • Training • Memo's • Incident reviews • Meetings 	

2.2.5	Working as a DEA may mean that much of employee's work will be carried out alone. In view of the potential risks when carrying out an EPC, how do you intend to monitor employee safety?	<ul style="list-style-type: none"> • Copy of diary • Log in, log out system • Frequent contact • Access to contact details of clients 	
2.2.6	If a colleague fails to attend scheduled appointments, how could you check on their safety? In the event of an emergency, what action would you take?	<ul style="list-style-type: none"> • Call previous client to check if left • Attempt to reach colleague by phone • Contact emergency services if serious concern • Log incident 	
2.2.7	House security is a major responsibility for DEA's as access may be granted to a number of properties at any one time. How can you ensure all employees are aware of good security practice?	<ul style="list-style-type: none"> • Policy • Training • Incident recording 	
2.3.6	Identify 3 measures to ensure keys and access codes for properties are secured and kept in appropriate locations?	<ul style="list-style-type: none"> • Locked safe • Pick up keys when needed • Destroy access codes after use • Limited access to keys • Procedure 	
2.3.7	In the event of a security emergency, i.e. loss of keys, security codes, what actions would you take?	<ul style="list-style-type: none"> • Assess situation • Contact client • Log incident • Review procedure 	

2.3.8	Changes in security procedure may occur on a regular basis. How will you inform colleagues of these changes	<ul style="list-style-type: none"> • Training • Memo's • Policy update 	
2.4.5	Highlight measures you would take to ensure client confidentiality?	<ul style="list-style-type: none"> • Protect confidential data • Security passwords • Locked cabinets • Policy • Safe disposal • Restricted access 	
2.4.7	Identify effective/ safe disposal of confidential data?	<ul style="list-style-type: none"> • Shredding • Confidential disposal bags 	
2.4.8	How do you intend to pass on changes in confidentiality procedure changes?	<ul style="list-style-type: none"> • Training • Written policy • Memo • Phone calls 	
3.1.1	On receiving a request for an EPC assessment, how would you confirm a suitable date and time?	<ul style="list-style-type: none"> • Check diary • Estimate logistics • Call • Confirm in writing 	

3.1.2	How do you intend to inform clients of your responsibilities and intentions when a suitable date has been agreed?	<ul style="list-style-type: none"> • Letter of engagement 	
3.1.3	Identify two circumstances that may lead to decline of request for an energy assessment?	<ul style="list-style-type: none"> • House not suitable • Digression 	
3.2.2-3	There is information that can be gathered before even entering the property you intend to assess. Can you identify examples of such data, and where can you source it from?	<ul style="list-style-type: none"> • Age of property • Heating systems • Boiler type • Extensions • Internet • Occupant 	
3.2.4-5	What would you do if prior research informs you that the property you have been requested to assess falls outside the scope of energy assessment legislation?	<ul style="list-style-type: none"> • Inform client • Give reasoning as to why 	
4.1.2	How can you ensure that site equipment is used correctly? If data is recorded inaccurately, the resulting EPC will misinform the client of its energy ratings. How can you minimise errors?	<ul style="list-style-type: none"> • Familiarise with equipment • Training • Check raw data before entry • Be aware of anomalous EPC output 	

4.1.3	How would you go about identifying yourself to those at the property before commencing inspection?	<ul style="list-style-type: none"> • Call prior to arrival • Letter • Introduce yourself • ID card 	
4.1.5	There may be occasion whereby an inspection is suspended midway through. Can you think of an example of an incident leading to suspension and how would you inform the client?	<ul style="list-style-type: none"> • Health and safety breach • Inform as to reasons why and explore potential for re-arranging for later date if appropriate. 	
4.1.9	If you are age banding a house and the occupier gives a different date to that of a date stone, you may need to carry out further investigation. What sources could you use to resolve inconsistencies?	<ul style="list-style-type: none"> • Check for date stone • Look at street and ask neighbours • Use house banding books to pick out distinguishable age band features. 	
4.2.2	Identify methods of storing your records securely?	<ul style="list-style-type: none"> • Locked cabinet • Security password computer • Appropriate backup 	
4.2.3-4	How can you ensure that records are organised, numbered and available at a later date?	<ul style="list-style-type: none"> • Filing system • Database of record numbers • Storage 	

5.1.4	When would you delete recommendations made in an EPC based on information collected in your site visit?	<ul style="list-style-type: none"> • Cavity wall insulation if damp 	
5.1.6	Data entry can result in inaccuracies on an EPC certificate. It is important to identify errors early. Can you give an example of output information that may indicate error?	<ul style="list-style-type: none"> • Bizarre energy rating incongruent with age banding and makeup • Recommendations already in place 	
5.2.3	Familiarise yourself with one of your EPC's. Note the important information to relay to the client and give explanation as to the recommendations suggested (I.e. Benefits)	<ul style="list-style-type: none"> • Energy efficiency rating • Environmental impact rating • High cost recommendation • Low cost recommendations • Estimate of costing and improvements made • Only a suggestion 	
5.2.4	A client may raise a query regarding your EPC recommendations. Using an EPC you have carried out, describe a query that could be raised and state how you would give a satisfactory response that aids understanding?	<ul style="list-style-type: none"> • Take time to explain recommendations • Discuss form as whole • Remind the client that it is a guide produced through software. 	