



Green Deal

Creating a Green Deal Plan – a Walkthrough Guide for Providers

This walkthrough guide is designed to provide a simplified overview of the process a Green Deal Provider must go through to create a Green Deal Plan.

The overview shows the various interactions and steps a Provider is likely to undertake when developing a Green Deal Plan, including information about the systems Providers are likely to use and the software needed to interact with these.

The overview also contains hyperlinks to more detailed explanations, guidance documentation and third party websites (e.g. Software or Finance companies).

More detailed information on the dataflows used can be found on the [MRA Data Transfer Catalogue](#) website, which will be of particular use to those developing IT systems.



Acronyms

DECC = Department of Energy and Climate Change

EPC = Energy Performance Certificate (held on register run by Landmark)

GDAR = Green Deal Advice Report (held on register run by Landmark)

GD Assessor = Green Deal Assessor

GDCC = Green Deal Central Charge Database (managed by Electralink)

GDIP = Green Deal Improvement Package (linked to GDAR)

GD Provider = Green Deal Provider

TGDFC = The Green Deal Finance Company



The Green Deal Assessment

Key purposes:

- Identify suitable energy efficiency measures for the home
- Estimate the energy bill savings – used for ‘golden rule’
- Create a Green Deal Advice Report

The assessment process:

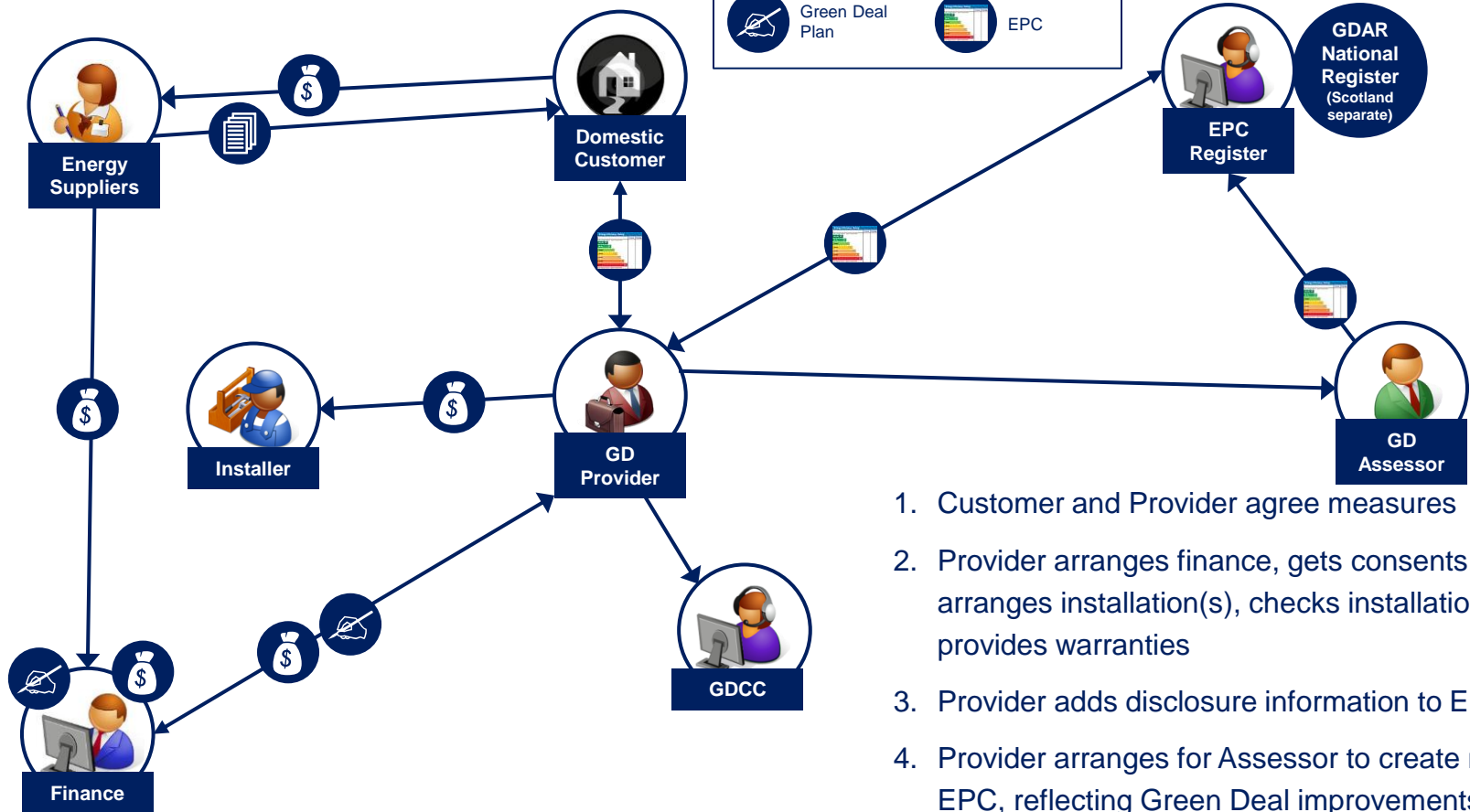
- Create an Energy Performance Certificate
- Undertake an Occupancy Assessment
- Select package of Green Deal improvement measures
- Lodge Green Deal Advice Report on the Register



Must be undertaken by qualified and certified Green Deal Advisor.

Once created, the customer can take the GDAR to any Green Deal Provider.

Overview - Interaction

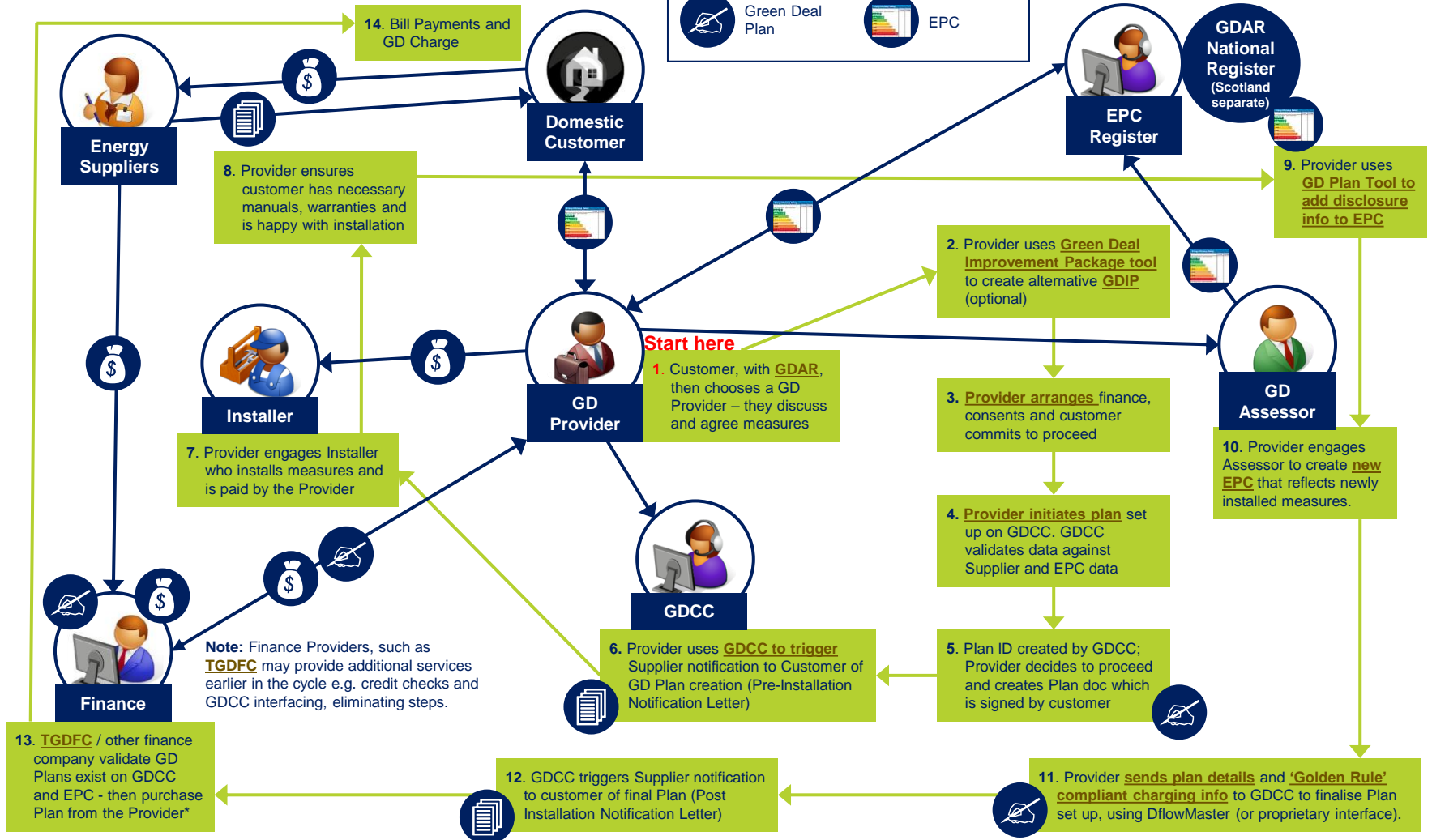


1. Customer and Provider agree measures
2. Provider arranges finance, gets consents, arranges installation(s), checks installation & provides warranties
3. Provider adds disclosure information to EPC
4. Provider arranges for Assessor to create new EPC, reflecting Green Deal improvements
5. Provider updates GDCC with Plan details, which instructs Supplier to start billing customer
6. **Optional:** Provider 'sells' Plan to Finance Co*

*This is only likely to be possible if the Provider has an existing contract with a Finance Company, who has agreed to buy plans: e.g. TGDFC requires Providers complete an 'on-boarding' process with them to register. Do not assume you can sell Plans retrospectively.

Overview - Interaction

Follow hyperlinks for more detail



*See asterisk footnote on previous slide

Thank you

End of presentation - Use hyperlinks on previous slide to find out more – these explain and link to each of the slides below

GD provider updates plan information (D0321)

on GDCC, with data below using **DflowMaster** or other proprietary software

Group	Group Description																		Value
94G	GD Provider Update References																		
	GD Plan ID																		AA1000000001
	Party Instruction Number																		2
	GD Provider Update Reason Code																		I
95G	Default Bill Payer Information	0-1	Mandatory where Reason Code = I. Must not be present where Reason Code = C																
	Default Bill Payer Name																		Mr I. Wannabgreen
	Address Line 1																		123 Green Lane
	Address Line 2																		Boilerton
	Address Line 3																		East Sussex
	Postcode																		BT9 1ZZ
96G	EPC and Savings Data	0-1	Mandatory where Reason Code = I. Must not be present where Reason Code = C																
	EPC Report Reference																		2478-8073-40-68-1527-1214
	GD Savings – Electricity																		
	GD Savings - Gas																		
	GD Savings – Other Fuels																		
97G	Customer Account Information	0-1	Mandatory where Reason Code = I. Must not be present where Reason Code = C																
	Electricity Account Number																		623662990
	GD Customer Site Reference																		

Enter the EPC Report Reference from the new EPC (the EPC done after the measures have been installed)

Green Deal Advice Reports (GDARs)

Green Deal Advice Reports (GDARs) and EPCs can be created by Green Deal Advisors using Assessor Tools, which are approved software products from commercial vendors. These software tools are usually operated and made available free of charge by the various Green Deal Certification Schemes.

At present there are six in operation:

- **Stroma**
- **BRE**
- **BSI/NES**
- **Quidos**
- **Elmhurst**
- **ECMK**
- **Etc... (a full list can be found on BRE site)**

Once a GDAR has been created using one of these tools, it is then stored on one of the central **National Registers** (there is one for England & Wales and a separate one for Scottish GDARs).

GDAR

GREEN DEAL
Advice Report
Occupancy Assessment

123 Green Street, Boilerton, BT9 1ZZ

Date of assessment: 07 January 2013 **Reference number:** 1234-4321-1234-4321-1234
Date of report: 10 January 2013 **UPRN:** 9876543210

This report shows how your household uses energy currently, and recommends ways of making your home more energy efficient. The amount of money you could save from Green Deal improvements depends on how much energy your household currently uses - the higher your bills, the more you could save.

Current energy bill for your household in £/year

Typical household



Your household

Typical household shows energy usage for a typical property of this size and type. Your household's energy usage is HIGHER than typical. See page 2 for how we have worked this out.

Green Deal improvements recommended by your assessor

For the list of recommendations on your Energy Performance Certificate, turn to the last page.

Improvements	Estimated costs*	Your household's estimated annual savings	Typical annual savings - maximum Green Deal repayment in year 1**
Internal wall insulation (100 mm) to 100% of insulated solid wall	£4,000 - £14,000	£186	£157
Draught proofing	£80 - £120	£45	£39
Total	£4,080 - £14,120	£231	£196
Electricity/gas/other fuel savings			£0 / £144 / £52

* Discounts available for qualifying homes - see page 3

Improvements

'Golden Rule' based on this amount

Green Deal Improvement Package Tool

The package of improvement measures on the first page of a GDAR is known as a 'Green Deal Improvement Package (GDIP)'.

A Green Deal Improvement Package Tool allows a Green Deal Advisor or a Green Deal Provider to revisit a GDAR and create alternative GDIPs.

This is an optional step. It is only required if the measures to be installed need to differ from those recommended in the original GDAR.

Any number of GDIPs can be created using a given GDAR.

An eventual Green Deal Plan can then be based upon any one of those GDIPs or the original GDAR.

The first GDIP tool, hosted by BRE, is now available at www.gdsap.org.uk and is free to use for any assessor or provider organisation.

bre
GREEN DEAL

 GDsap
Occupancy Assessment

Login
Forgot password

email

Password

Login

Sign up now

* Note that by login on this website a **cookie** will be stored on your computer for the period of the **session**. When the browser is closed, the cookie is deleted automatically.

The site to support the implementation of SAP for Green Deal does not capture or store personal information from site visitors, other than to log the user's access in the normal practice of maintaining site security.

Forgot your password or first time you log in?
Click here

Unable to login: If you are unable to login after registering and the system does not allow to register again with your email address, please send an email to gdsap@bre.co.uk from the email address you are having problems to register/login and with subject: Unable to login. Thanks.

To create email click here

You are not logged in

© BRE 2012 (site policy)

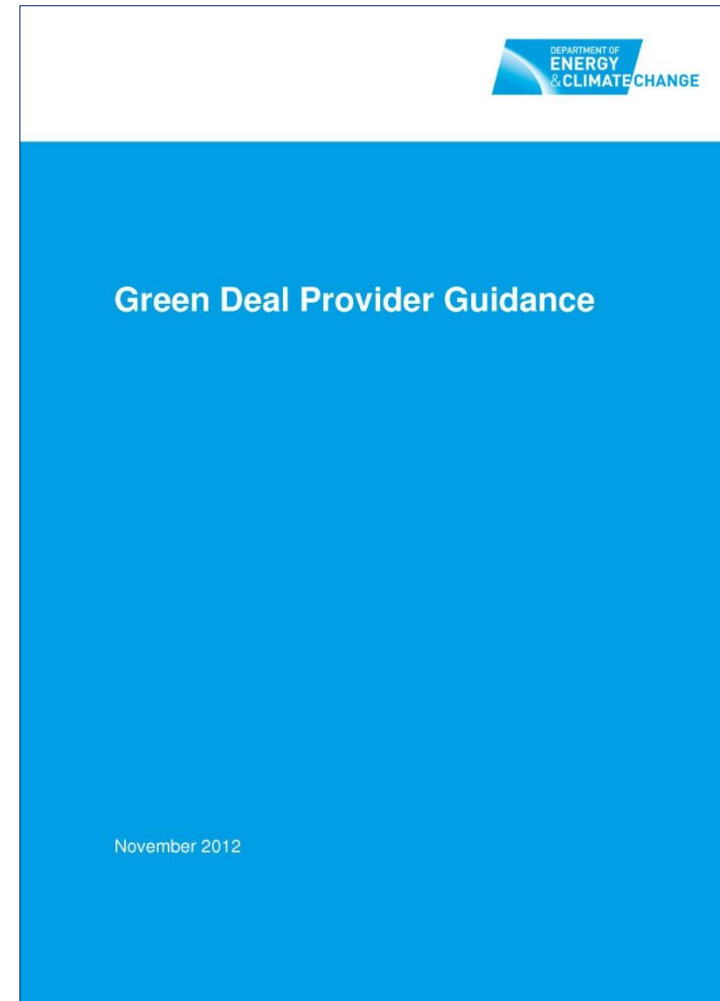
www.gdtool.bre.co.uk

Version: www 1.6.0

Provider Guidance

The **Green Deal Provider Guidance** is intended to provide additional information for Green Deal Providers on the requirements of operating in the Green Deal market, e.g. Obtaining Consents .

It is not a comprehensive handbook to the market, but instead gives guidance on the underlying regulatory framework, in particular the requirements in developing a Green Deal Plan and the monitoring and sanctions processes. It should be read in conjunction with **Part 1, Chapter 1 of the Energy Act 2011**, the **Green Deal Framework Regulations (Disclosure, Acknowledgement, Redress etc.) 2012** and the **Green Deal Code of Practice**.



Create New Green Deal Plan (D0317)

Provider updates GDCC with data below using **DflowMaster** or other proprietary software.

A full list of data flows can be found on **MRA Data**

Transfer Catalogue website

Group	Group Description	Condition	Value
86G	Initial Plan Information		
	Party Instruction Number		1
	EPC Register Indicator		E
	EPC Domestic or Non-Domestic Indicator		D
	<u>EPC Property Reference Number</u>		3981490078
	<u>EPC Report Reference</u>		2478-8073-4068-1527-1214
	<u>Postcode</u>		BT9 1ZZ
	<u>Electricity Account Number</u>		858808312835
	GD Customer Site Reference		
87G	MPAN Core(s)		
	<u>MPAN Core</u>		10 1235 3032 516
88G	Subsidiary PRNS		
	Subsidiary EPC Property Reference		

This is a unique reference number used for data transactions to, and from, the GDCC. It is sequential (1, 2, etc.) and determined by the sender.

The valid values for the EPC Register Indicator are "E" (for England and Wales) and "S" for Scotland.

The Property Reference Number (UPRN) is included on the GDAR. If it is a domestic property then the reference number should be a 10 digit number; if it is a non-domestic property, it is a 12 digit number.

The 'RRN' - This number needs to be a 20 digit number shown in five four-digit parts, separated by hyphens.

This is the postcode from the EPC (not the bill).

Customer Number on Elec. Bill

This is the national reference number for a metering system and is unique to the property

You do not need to populate these fields

'D' indicates a domestic customer; 'N' indicates a non-domestic

Provider Updates Green Deal Charge

Details of GD Plan (D0322)

Provider updates GDCC with data below using **DflowMaster** or other proprietary software, which triggers the Supplier Post Installation Letter

Group	Group Description																		Value
98G	GD Provider Update References																		
	GD Plan ID																		AA1000000001
	Party Instruction Number																		4
	GD Provider Update Reason Code																		I
99G	GD Charge Information	0-1	Mandatory where Reason Code = I. Must not be present where Reason Code = E																
	GD Charge Start Date																		20120915
	GD Charge End Date																		20130915
	GD Daily Charge																		0.58
00H	GD Plan End Date	0-1	Mandatory where Reason Code = I or E																
	GD Plan Actual End Date																		20130915
01H	GD Remittance Processor Information	0-1	Mandatory where Reason Code = I. Must not be present where Reason																
	GD Remittance Processor MPID																		GDFC
	GD Remittance Processor EFD																		20120915

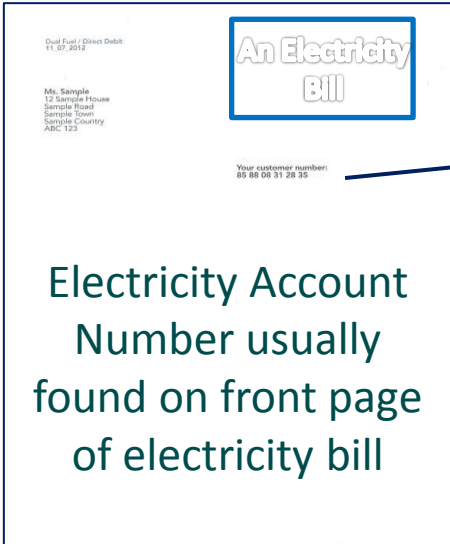
Charges for the entire period of the GD Plan should be included in group 99G when this is an initial (I) flow.

This code gives the reason for the data being sent by the provider and there are four codes:

- C= Cancel Green Deal Plan where dates not yet in MPAS
- E=Amend the Actual GD End Date where dates in MPAS, but notification of pending Green Deal Charges not generated to Bill Payer
- I=Provision of initial data for set up
- U=Updates to Green Deal Plan or Charging information.

Energy Bill

Electricity account number and MPAN highlighted (the customer should contact the supplier if they cannot find these on the bill).



Qual Fuel / Direct Debit
11.07.2012

An Electricity Bill

Ms. Sample
12 Sample House
Sample Road
Sample Town
Sample County
ABC 123

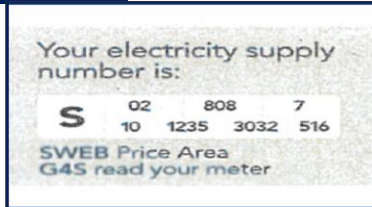
Your customer number:
85 88 08 31 28 35

Your customer number:
85 88 08 31 28 35

Sample bill for test purposes only

Electricity Account Number usually found on front page of electricity bill

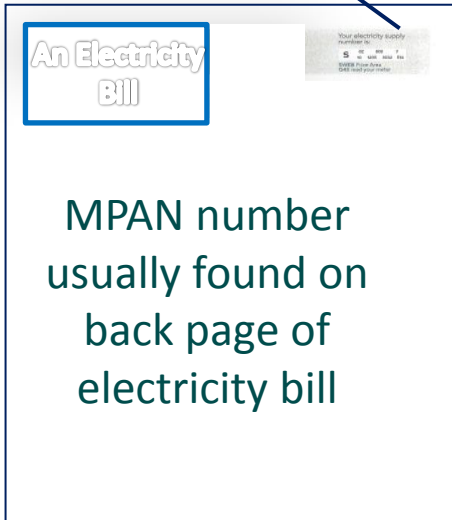
The bottom line of the S number is the MPA Core / MPAN number that is required for the data flows



Your electricity supply number is:

S	02	808	7
	10	1235	3032 516

SWEB Price Area
G45 read your meter



An Electricity Bill

Your electricity supply number is:
S 02 808 7
10 1235 3032 516
SWEB Price Area
G45 read your meter

MPAN number usually found on back page of electricity bill

EPC (1 of 3)

Energy Performance Certificate

PREVIEW
NOT FOR ISSUE

123 Green St, Boilerton, East Sussex BT9 1ZZ

Dwelling type: end-terrace house Reference number: 2478-8073-4068-1527-1214
 Date of assessment: 14 August 2012 Type of assessment: RdSAP, existing dwelling
 Date of certificate: 14 August 2012 Total floor area: 107 m²

Use this document to:

- Compare current ratings of properties to see which properties are more energy efficient
- Find out how you can save energy and money by installing improvement measures

Estimated energy costs of dwelling for 3 years:	£4,521
Over 3 years you could save	£2,955

Estimated energy costs of this home			
	Current costs	Potential costs	Potential future savings
Lighting	£330 over 3 years	£165 over 3 years	<div style="border: 1px solid green; padding: 5px; background-color: #4CAF50; color: white; width: fit-content; margin: 0 auto;"> You could save £2,955 over 3 years </div>
Heating	£2,991 over 3 years	£1,167 over 3 years	
Hot Water	£1,200 over 3 years	£234 over 3 years	
Totals	£4,521	£1,566	

These figures show how much the average household would spend in this property for heating, lighting and hot water. This excludes energy use for running appliances like TVs, computers and cookers, and any electricity generated by microgeneration.

Energy Efficiency Rating

<p><small>Very energy efficient - lower running costs</small></p> <div style="display: flex; justify-content: space-between;"> <div style="width: 40%;"> <p>(92 plus) A</p> <p>(81-91) B</p> <p>(69-80) C</p> <p>(55-68) D</p> <p>(39-54) E</p> <p>(21-38) F</p> <p>(1-20) G</p> <p><small>Not energy efficient - higher running costs</small></p> </div> <div style="width: 50%; border: 1px solid black; padding: 5px; text-align: center;"> <table style="width: 100%; border-collapse: collapse;"> <tr> <th style="width: 50%; border: none;">Current</th> <th style="width: 50%; border: none;">Potential</th> </tr> <tr> <td style="border: none; text-align: center; font-size: 2em;">41</td> <td style="border: none; text-align: center; font-size: 2em;">88</td> </tr> </table> </div> </div>	Current	Potential	41	88	<p>The graph shows the current energy efficiency of your home.</p> <p>The higher the rating the lower your fuel bills are likely to be.</p> <p>The potential rating shows the effect of undertaking the recommendations on page 3.</p> <p>The average energy efficiency rating for a dwelling in England and Wales is band D (rating 60).</p>
Current	Potential				
41	88				

Top actions you can take to save money and make your home more efficient

Recommended measures	Indicative cost	Typical savings over 3 years	Available with Green Deal
1 Increase loft insulation to 270 mm	£100 - £350	£660	✔
2 Cavity wall insulation	£500 - £1,500	£819	✔
3 Floor insulation	£800 - £1,200	£174	✔

See page 3 for a full list of recommendations for this property.

To find out more about the recommended measures and other actions you could take today to save money, visit www.direct.gov.uk/savingenergy or call 0300 123 1234 (standard national rate). When the Green Deal launches, it may allow you to make your home warmer and cheaper to run at no up-front cost.

RRN

Postcode

123 Green St, Boilerton, East Sussex BT9 1ZZ

14 August 2012

PREVIEW - NOT FOR ISSUE
Energy Performance Certificate

RRN: 2478-8073-4068-1527-1214

Summary of this home's energy performance related features

Element	Description	Energy Efficiency
Walls	Cavity wall, as built, no insulation (assumed)	★☆☆☆☆
Roof	Pitched, no insulation	★☆☆☆☆
Floor	Suspended, no insulation (assumed)	—
Windows	Fully double glazed	★★★★☆
Main heating	Boiler and radiators, mains gas	★★★★☆
Main heating controls	Programmer, room thermostat and TRVs	★★★★☆
Secondary heating	None	—
Hot water	From main system, no cylinder thermostat	★★☆☆☆
Lighting	No low energy lighting	★☆☆☆☆

Current primary energy use per square metre of floor area: 380 kWh/m² per year

The assessment does not take into consideration the physical condition of any element. 'Assumed' means that the insulation could not be inspected and an assumption has been made in the methodology based on age and type of construction.

See addendum on the last page relating to items in the table above.

Low and zero carbon energy sources

Low and zero carbon energy sources are sources of energy that release either very little or no carbon dioxide into the atmosphere when they are used. Installing these sources may help reduce energy bills as well as cutting carbon. There are none provided for this home.

Opportunity to benefit from a Green Deal on this property

When the Green Deal launches, it may enable tenants or owners to improve the property they live in to make it more energy efficient, more comfortable and cheaper to run, without having to pay for the work upfront. To see which measures are recommended for this property, please turn to page 3. You can choose which measures you want and ask for a quote from an authorised Green Deal provider. They will organise installation by an authorised installer. You pay for the improvements over time through your electricity bill, at a level no greater than the estimated savings to energy bills. If you move home, the Green Deal charge stays with the property and the repayments pass to the new bill payer.

For householders in receipt of income-related benefits, additional help may be available.

To find out more, visit www.direct.gov.uk/savingenergy or call 0300 123 1234.

Authorised home energy assessment

Finance at no upfront cost

Choose from authorised installers

Pay from savings in energy bills

Repayments stay with the home

EPC (2 of 3)

123 Green St, Boilerton, East Sussex BT9 1ZZ
14 August 2012 RRN: 2478-8073-4068-1527-1214

PREVIEW - NOT FOR ISSUE
Energy Performance Certificate

Recommendations

The measures below will improve the energy performance of your dwelling. The performance ratings after improvements listed below are cumulative; that is, they assume the improvements have been installed in the order that they appear in the table. Further information about the recommended measures and other simple actions you could take today to save money is available at www.direct.gov.uk/savingenergy. Before installing measures, you should make sure you have secured the appropriate permissions, where necessary. Such permissions might include permission from your landlord (if you are a tenant) or approval under Building Regulations for certain types of work.

Measures with a green tick are likely to be fully financed through the Green Deal, when the scheme launches, since the cost of the measures should be covered by the energy they save. Additional support may be available for homes where solid wall insulation is recommended. If you want to take up measures with an orange tick , be aware you may need to contribute some payment up-front.

Recommended measures	Indicative cost	Typical savings per year	Rating after improvement	Green Deal finance
Increase loft insulation to 270 mm	£100 - £350	£220		
Cavity wall insulation	£500 - £1,500	£273		
Floor insulation	£800 - £1,200	£58		
Insulate hot water cylinder with 80 mm jacket	£15 - £30	£155		
Draught proofing	£80 - £120	£42		
Low energy lighting for all fixed outlets	£75	£46		
Hot water cylinder thermostat	£200 - £400	£64		
Replace boiler with new condensing boiler	£2,200 - £3,000	£94		
Solar water heating	£4,000 - £6,000	£34		
Solar photovoltaic panels, 2.5 kWp	£9,000 - £14,000	£222		

Alternative measures

There are alternative measures below which you could also consider for your home.

- Air or ground source heat pump
- Micro CHP

Visit www.epcadviser.direct.gov.uk, our online tool which uses information from this EPC to show you how to save money on your fuel bills. You can use this tool to personalise your Green Deal package.

Directgov
Public services all in one place

Green Deal package	Typical annual savings
Loft insulation	Total savings of £754
Cavity wall insulation	
Hot water cylinder insulation	
Draught proofing	
Cylinder thermostat	
Electricity/gas/other fuel savings	£0 / £754 / £0

You could finance this package of measures under the Green Deal. It could **save you £754 a year** in energy costs, based on typical energy use. Some or all of this saving would be recouped through the charge on your bill.

123 Green St, Boilerton, East Sussex BT9 1ZZ
14 August 2012 RRN: 2478-8073-4068-1527-1214

PREVIEW - NOT FOR ISSUE
Energy Performance Certificate

About this document

The Energy Performance Certificate for this dwelling was produced following an energy assessment undertaken by a qualified assessor, accredited by Stroma Certification. You can get contact details of the accreditation scheme at www.stroma.com, together with details of their procedures for confirming authenticity of a certificate and for making a complaint. A copy of the certificate has been lodged on a national register. It will be publicly available and some of the underlying data may be shared with others for the purposes of research, compliance and direct mailing of relevant energy efficiency information. The current property owner and/or tenant may opt out of having this information disclosed.

Assessor's accreditation number: DECC01001
Assessor's name: Mr Alan Green
Phone number: 0201234567
E-mail address: Al.green@supergreen.com
Related party disclosure: No related party

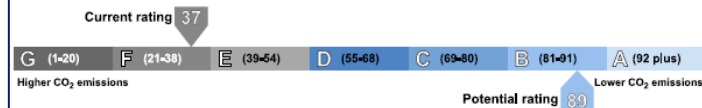
Further information about Energy Performance Certificates can be found under Frequently Asked Questions at www.epcregister.com.

About the impact of buildings on the environment

One of the biggest contributors to global warming is carbon dioxide. The energy we use for heating, lighting and power in homes produces over a quarter of the UK's carbon dioxide emissions.

The average household causes about 6 tonnes of carbon dioxide every year. Based on this assessment, your home currently produces approximately 7.8 tonnes of carbon dioxide every year. Adopting the recommendations in this report can reduce emissions and protect the environment. If you were to install these recommendations you could reduce this amount by 6.5 tonnes per year. You could reduce emissions even more by switching to renewable energy sources.

The environmental impact rating is a measure of a home's impact on the environment in terms of carbon dioxide (CO₂) emissions. The higher the rating the less impact it has on the environment.



Your home's heat demand

For most homes, the vast majority of energy costs derive from heating the home. Where applicable, this table shows the energy that could be saved in this property by insulating the loft and walls, based on typical energy use (shown within brackets as it is a reduction in energy use).

Heat demand	Existing dwelling	Impact of loft insulation	Impact of cavity wall insulation	Impact of solid wall insulation
Space heating (kWh per year)	17,305	(4,504)	N/A	N/A
Water heating (kWh per year)	7,484			

EPC (3 of 3)

Provider uses GD Plan Tool to add disclosure page to EPC

- To enable Green Deal debt to transfer between bill payers, the terms of the Green Deal plan have to be disclosed to the incoming debtor.
- As the transfer of responsibility for paying the Green Deal charge is intrinsically linked to the transfer of property (sale or rent), the EPC is used for disclosure, as it is already a requirement for all property transactions since 2007.
- Before a Green Deal plan can be finalised (and Green Deal charge accrued), the terms of the plan need to be added to the EPC, which are displayed in an additional page at the back of the EPC.
- This information is added using the Green Deal Plan Tool. A guide on how to use the tool can be found here.

Information about the Green Deal Plan relating to this property		Energy Performance Certificate RRN: 8167-6529-4910-6246-6992			
<p>A Green Deal has paid to install energy efficiency improvements at this property. If you become responsible for paying the electricity bill, you will be required to pay the Green Deal charge set out below. Also, you must comply with the terms and conditions in the Green Deal Plan. You should ask for a copy of the up to date Green Deal Plan from the owner of the property or the landlord and familiarise yourself with the contents.</p>		<p>The Green Deal can be paid off early, although charges may apply. The Green Deal is a new type of unsecured loan, which is regulated by the Consumer Credit Act 1974. It is designed to save you at least as much as you will have to repay. However, the actual amount of your savings will depend on how much energy you use (e.g. to heat your property) and on energy prices.</p>			
<p>Current charge amount: £1.37 per day (£500 p.a.) Charges start: 30/01/2013 Charges end: 27/01/2038 Interest rate payable: variable at 10.67% APR</p> <p>Plan charges:</p> <ul style="list-style-type: none"> are payable as part of the electricity bill reduce as each improvement is paid-off 	<p>GD Plan number: AB0000000690 Green Deal Provider: Green Deal Plan 'R' Us Ltd Tel: +44(0) 10 1113441 Email: green.deal@provider.co.uk This Green Deal information was generated on 19/02/2013. It was last updated by the Green Deal Provider on 30/01/2013. You can check for updates using the EPC Report Reference Number (RRN above) at www.epcregister.com</p>	<p>Enter provider details here (name, contact details)</p>			
<table border="1"> <thead> <tr> <th>Improvements installed</th> <th>Paid-off in</th> </tr> </thead> <tbody> <tr> <td>Condensing gas boiler: Bubble Toil & Trouble....</td> <td>January 2023</td> </tr> </tbody> </table>	Improvements installed		Paid-off in	Condensing gas boiler: Bubble Toil & Trouble....	January 2023
Improvements installed	Paid-off in				
Condensing gas boiler: Bubble Toil & Trouble....	January 2023				
<p>Other important information:</p> <p>This Green Deal is regulated by the Consumer Credit Act 1974. This provides certain protections to those paying the Plan instalments through their electricity bill. The improvements listed above were installed under this Green Deal Plan and are due to be paid-off at the times specified. If an improvement listed above has not been paid off, you should check that:</p> <ul style="list-style-type: none"> it is still in place; no alterations have been made to this property that would reduce its effectiveness; it has been maintained in line with guidance from the Green Deal Provider. <p>If, after taking-on this property, you are considering or carrying out renovations that may impact on the improvements installed under this plan, or you notice that such changes have already been made, you must contact your Green Deal Provider.</p>		<p>Mandatory product guarantees are supplied for at least five years. These may be subject to maintenance or servicing requirements and you should check these have been met.</p> <p>Charges may apply if you decide to repay this Green Deal Plan early and these details are set out in the Plan. If you take on this property, you may have to repay this Plan early if you want to demolish this property or permanently disconnect the electricity meter – contact your Green Deal Provider for further details.</p> <p>New bill payers are advised to contact their energy supplier when they take on a Green Deal property, particularly if the property has a pre-payment meter.</p> <p>Further information can be found on the Green Deal Plan, a copy of which can be obtained from the owner of the property, or from the Green Deal Provider with the owner's consent.</p>			

Green Deal Advice Report (GDAR) (1 of 2)

This is produced as a result of the occupancy assessment

Sample occupancy assessment for test purposes only

GREEN DEAL Advice Report Occupancy Assessment

123 Green Street, Boilerton, BT9 1ZZ

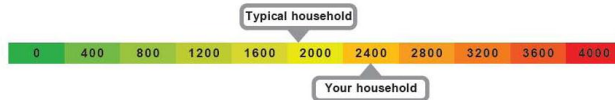
Date of assessment: 07 January 2013
Date of report: 10 January 2013

Reference number: 1234-4321-1234-4321-1234
UPRN: 9876543210

UPRN

This report shows how your household uses energy currently, and recommends ways of making your home more energy efficient. The amount of money you could save from Green Deal improvements depends on how much energy your household currently uses – the higher your bills, the more you could save.

Current energy bill for your household in £/year



'Typical household' shows energy usage for a typical property of this size and type. Your household's energy usage is HIGHER than typical. See page 2 for how we have worked this out.

Green Deal improvements recommended by your assessor

For the list of recommendations on your Energy Performance Certificate, turn to the last page.

Improvements	Estimated costs*	Your household's estimated annual savings	Typical annual savings - maximum Green Deal repayment in year 1**
Internal wall insulation (100 mm) to 100% of insulated solid wall	£4,000 - £14,000	£186	£157
Draught proofing	£80 - £120	£45	£39
Total	£4,080 - £14,120	£231	£196
Electricity/gas/other fuel savings			£0 / £144 / £52

* Discounts available for qualifying homes - see page 3.

** Repayments capped at this level - providers could charge less.

Insulation thickness shown in the table is based on mineral wool. A different thickness of other materials may provide the same performance.

Your chosen package could save up to £231 per year on your energy bills.

Your annual repayments on your energy bill (after estimated savings): £-35

Actual savings will depend on how much energy you use and the cost of energy.

The maximum amount that the Green Deal provider could charge in Green Deal instalments for this package of improvements in the first year is £196. Green Deal repayments would be added to your electricity bill, spread over the year. The typical savings which are quoted here, and which form the basis of the maximum repayments that can be charged, have been adjusted downwards from the energy saving estimates shown on the Energy Performance Certificate. This is a precautionary step to reflect variation in buildings, products and installation techniques.

Some measures may not be fully financed through the Green Deal and so additional payment may be needed. Contact an authorised Green Deal Provider for a full quote.

Improvements

GREEN DEAL Occupancy Assessment

What makes you different?	Typical household	Your household
Number of occupants	3	5
Average hours of heating per day	11	16
Thermostat setting	21°C	unknown
Number of rooms not heated	0	0

Your energy use

- Your household's energy usage is higher than typical.
- Therefore you could save more money by installing improvements than a typical home would save.

Why is this important?

- Green Deal providers cannot charge higher repayments than typical savings for a property like yours.
- Repayments may be lower than your savings because you might save more than a typical home.
- Page 1 shows the difference between savings. Consider this difference when deciding whether to take out a Green Deal.

Why the Green Deal works like this

- The Green Deal is a loan that remains with the property, not with you, so it is based on savings of a typical household.

Ways to save today

		Why is this important?	What you can do to save today
	Heating	Approximately 75% of your energy goes towards heating your home	Close your curtains at night to reduce heat escaping through the windows.
	Hot water	Approximately 10% of your energy is used to heat your water	You could reduce your hot water use by taking showers instead of baths.
	Lights and appliances	Usage is growing fast when there are easy ways to save	Turn off lights when not needed and do not leave appliances on standby. Remember not to leave chargers (e.g. for mobile phones) turned on when you are not using them. When replacing an appliance, consider choosing an energy efficient model. If you're not filling up the washing machine, tumble dryer or dishwasher, use the half-load or economy programme. Tumble dryers use a lot of electricity. Save energy by drying clothes outside whenever you can.

Green Deal Advice Report (GDAR) (2 of 2)

This is produced as a result of the occupancy assessment

Sample occupancy assessment for test purposes only

GREEN DEAL Occupancy Assessment

Your next steps

1 Assessment	2 Recommendations	3 Quotes	4 Installation	5 Benefits
				

You are here

Visit www.direct.gov.uk/savingenergy to find a list of authorised Green Deal providers who can quote for the work you want. They will organise installation by an authorised installer.

Additional support may be available for homes where solid wall insulation is recommended and for householders in receipt of income-related benefits.

About this document

This Occupancy Assessment report was produced following an occupancy assessment undertaken by a Green Deal Advisor on behalf of Testers Certification, who are certified by a certification body. You can get details of the certification body at <http://www.testers.com/certification> along with details of their procedures for confirming this is an authentic certificate and for making a complaint.

Assessor Organisation: Testers Certification
Assessor Organisation's certification number: TSTA00000
Advisor's EPBD accreditation number: TSTO000001
Advisor's name: Mr G Deal
Phone number: 0123 654321
E-mail address: email@address.com
Related party disclosure: No related party

As part of the Green Deal a number of organisations will need to either collect, store or share information about you. This is essential for your request to be processed and for changes to be made to your home. Some of this information will be used to produce statistics and support further research of how the Green Deal is working. The statistics are used in such a way that you cannot be identified from them. Your personal information will be properly safeguarded and processed in accordance with the requirements of the Data Protection Act 1998. The Department of Energy and Climate Change (DECC) may also contact you in the future to ask you some questions about your experiences of the Green Deal.

For free impartial advice on the Green Deal (including this assessment), visit the Energy Saving Advice Service at www.gov.uk/greendeal or call 0300 123 1234 (standard national call rate)



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GREEN DEAL Occupancy Assessment

Improvements recommended on the EPC

Improvements	Estimated costs	Your household's estimated annual savings	Expected Green Deal repayment in year 1	Green Deal finance
Internal or external wall insulation	£4,000 - £14,000	£192	£162	✓
Floor insulation	£800 - £1,200	£42	£36	✓
Draught proofing	£80 - £120	£46	£39	✓
Low energy lighting for all fixed outlets	£70	£57	£44	
Replace single glazed windows with low-E double glazing	£3,300 - £6,500	£83	£71	✓
Total	£8,250 - £21,890	£420	£352	

The typical savings which are quoted here have been adjusted downwards from the energy saving estimates shown on the Energy Performance Certificate. This is a precautionary step to reflect variation in buildings, products and installation techniques.

The improvements that are recommended in the EPC should also be listed here (whilst this OA does not match the EPC entirely it should be assumed that in practice the two will match up).

Page 4 of 4

Green Deal Improvement Package (GDIP)

Any number of GDIPs can be created using a given **GDAR**, using the **Green Deal Improvement Package Tool** – i.e. A GDAR can be associated with multiple GDIPs.

Some rules of use:

- Provider cannot use GDIP tool to add or reconfigure measures.
- The original Advisor can add or reconfigure measures.

GREEN DEAL Improvement Package

123 Green St, Boilerton, East Sussex BT9 1ZZ

Date of assessment: 21 August 2012 Package ID: 5147498150-7910120364
 Date of report: 03 April 2013 UPRN: 1234567890

This report defines your Green Deal Improvement Package based on the occupancy assessment in report 0912-9658-8430-2789-5926.

Green Deal improvement package based on recommendations by your assessor

Improvements	Estimated costs*	Your household's estimated annual savings	Typical annual savings - maximum Green Deal repayment in year 1**
Internal wall insulation (100 mm) to 100% of stone wall	£4,000 - £14,000	£124	£136
Draught proofing	£80 - £120	£15	£16
Hot water cylinder insulation	£15 - £30	£19	£31
Total	£4,095 - £14,150	£158	£183
Electricity/gas/other fuel savings			£149 / £0 / £34

* Discounts available for qualifying homes.
 ** Repayments capped at this level - providers could charge less.
 Insulation thickness shown in the table is based on mineral wool. A different thickness of other materials may provide the same performance.

Your chosen package could save up to £158 per year on your energy bills.

Your annual repayments on your energy bill (after estimated savings): £25

Actual savings will depend on how much energy you use and the cost of energy.

The maximum amount that the Green Deal provider could charge in Green Deal instalments for this package of improvements in the first year is **£183**. Green Deal repayments would be added to your electricity bill, spread over the year. The typical savings which are quoted here, and which form the basis of the maximum repayments that can be charged, have been adjusted downwards from the energy saving estimates shown on the Energy Performance Certificate. This is a precautionary step to reflect variation in buildings, products and installation techniques.

Some measures may not be fully financed through the Green Deal and so additional payment may be needed.

This report was prepared by:

Provider Organisation:	MonkeyWrench GD Providers Ltd
Provider Organisation's certification number:	GDPA100
Provider's User number:	GDPA10010000
Name:	Jack Jones
Phone number:	030 2222 5678
E-mail address:	jack.jones@isp.net
Related party disclosure:	Receives commission on sales of measures

Page 1 of 1



Provider Advises of Pending Green Deal Plan (D0323)

Provider uses GDCC to trigger a Supplier Pre-Installation Letter, using DflowMaster or other proprietary software

Group	Group Description																		Value
02H	Pending GD Plan Information					G													
	GD Plan ID																		AA1000000001
	Party Instruction Number																		1

Creating a new EPC Post Installation

Once the measures have been installed and the customer is satisfied, the Provider engages an Assessor who creates the post-install assessment and EPC lodgement. **The Assessor does this using evidence received from a Green Deal Provider – they are not required to visit or re-visit the property.**

More detail on post-install EPC creation and the role of Assessors can be found at:

<http://www.greendealorb.co.uk/assessors/assessor-guidance>

&

<https://www.gov.uk/government/publication/s/energy-performance-certificates-for-the-construction-sale-and-let-of-dwellings>

Energy Performance Certificate

PREVIEW
NOT FOR ISSUE

107 Chapel Lane, Wilmslow, Cheshire, SK9 5JH

Dwelling type:	end-terrace house	Reference number:	2478-8073-4068-1527-1214
Date of assessment:	14 August 2012	Type of assessment:	RdSAP, existing dwelling
Date of certificate:	14 August 2012	Total floor area:	107 m ²

Use this document to:

- Compare current ratings of properties to see which properties are more energy efficient
- Find out how you can save energy and money by installing improvement measures

Estimated energy costs of dwelling for 3 years:	£4,521
Over 3 years you could save	£2,955

Estimated energy costs of this home			
	Current costs	Potential costs	Potential future savings
Lighting	£330 over 3 years	£165 over 3 years	<div style="font-size: 2em; color: green;">↑</div> <p style="margin: 0; font-weight: bold; color: green;">You could save £2,955 over 3 years</p>
Heating	£2,991 over 3 years	£1,167 over 3 years	
Hot Water	£1,200 over 3 years	£234 over 3 years	
Totals	£4,521	£1,566	

These figures show how much the average household would spend in this property for heating, lighting and hot water. This excludes energy use for running appliances like TVs, computers and cookers, and any electricity generated by microgeneration.

Energy Efficiency Rating

<p style="font-size: x-x-small;">Very energy efficient - lower running costs</p> <div style="display: flex; justify-content: space-between;"> <div style="width: 45%;"> <p style="background-color: #4CAF50; color: white; padding: 2px;">(92 plus) A</p> <p style="background-color: #8BC34A; padding: 2px;">(81-91) B</p> <p style="background-color: #FFEB3B; padding: 2px;">(69-80) C</p> <p style="background-color: #FFC107; padding: 2px;">(55-68) D</p> <p style="background-color: #FF9800; padding: 2px;">(39-54) E</p> <p style="background-color: #FF5722; padding: 2px;">(21-38) F</p> <p style="background-color: #D32F2F; padding: 2px;">(1-20) G</p> <p style="font-size: x-x-small;">Not energy efficient - higher running costs</p> </div> <div style="width: 5%; text-align: center;"> <p style="border: 1px solid black; padding: 2px;">Current</p> <p style="border: 1px solid black; padding: 2px;">Potential</p> </div> <div style="width: 45%;"> <p style="font-size: 2em; font-weight: bold; color: green; text-align: center;">88</p> <p style="font-size: 2em; font-weight: bold; color: orange; text-align: center;">41</p> </div> </div>	<p>The graph shows the current energy efficiency of your home.</p> <p>The higher the rating the lower your fuel bills are likely to be.</p> <p>The potential rating shows the effect of undertaking the recommendations on page 3.</p> <p>The average energy efficiency rating for a dwelling in England and Wales is band D (rating 60).</p>
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Top actions you can take to save money and make your home more efficient			
Recommended measures	Indicative cost	Typical savings over 3 years	Available with Green Deal
1 Increase loft insulation to 270 mm	£100 - £350	£660	✔
2 Cavity wall insulation	£500 - £1,500	£819	✔
3 Floor insulation	£800 - £1,200	£174	⚠

See page 3 for a full list of recommendations for this property.

To find out more about the recommended measures and other actions you could take today to save money, visit www.direct.gov.uk/savingenergy or call 0300 123 1234 (standard national rate). When the Green Deal launches, it may allow you to make your home warmer and cheaper to run at no up-front cost.