



# Energy Efficiency Assessor Quality Assurance Procedure

## Background

As a NatHERS Assessor Accrediting Organisation (AAO), Design Matters National (DMN) is obligated under the NatHERS AAO Protocol to conduct annual Quality Assurance (QA) reviews of energy assessment reports produced by Accredited EEA members.

In 2022 the NatHERS Administrator requested AAO's to increase the numbers of annual QA reviews. This change provided DMN an opportunity to review its QA review process, to not only meet the requirements of NatHERS but most importantly, to support members who do not pass a QA review by providing industry best practice education and mentoring so they have the skillsets necessary to provide ongoing energy assessment services to the public.

The new QA procedure is divided into four (4) tiers and commenced 1 October 2021.

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## Quality Assurance Process

### Tier 1 QA Review

- The QA Review Team conducts spot checks on recently uploaded project files in the portal.
- Selected project files are reviewed and scored using a matrix of the most common errors evident in historic QA data.
- If the minimum level of demonstrated competency (pass) of 80% is attained, no further action is required.
- If the minimum level of demonstrated competency is not attained, the EEA member is instructed to undertake a Tier 2 QA Review.

### Tier 2 QA Review

- The EEA is required to review, correct and return the identified project file, related drawing set and documentation within seven (7) days of being notified of a QA Tier 2 request.
- If the minimum level of demonstrated competency (pass) of 80% is attained, no further action is required. To ensure the EEA member continues to demonstrate compliance with the NatHERS Technote and industry best practice, the Assessor should be aware that an alternative project may be selected from your portal for follow up review within 90 days.
- If the minimum level of demonstrated competency (pass) of 80% is not attained, the Member must register for the next available DMN QA Tier 3 Upskill Now Masterclass within seven (7) days of notification of QA Tier 3 request to avoid suspension from portal/s. Requests for an extension must be made in writing via email and prior to the seven (7) days.

### Tier 3 QA EEA Upskill Program (self-funded Continuing Professional Development)

- The **DMN Upskill Now Masterclass (UNM)** is an intensive, live three hour online masterclass, accompanied by a one hour software specific break out room where all software specific modelling questions will be answered.
- At the completion of DMN Upskill Now Masterclass, the UNM demonstration drawing set is provided for the attendee to complete an assessment on and return for Tier 3 QA Review within seven (7) days.
- If the minimum level of demonstrated competency (pass) of 85% is attained on the drawing set, no further action is required. To ensure the EEA member continues to demonstrate compliance with the NatHERS Technote and industry best practice, the Assessor should be aware that an alternative project may be selected from your portal for follow up review within 90 days.
- If the minimum level of demonstrated competency (pass) of 85% is not attained, the member is instructed to undertake mandatory Tier 4 EEA Mentoring and access to your portal/s is temporarily suspended.

### Tier 4 QA Mentoring (self-funded Continuing Professional Development)

To provide DMN EEA Members flexibility, there are three (3) QA Mentoring options available.



## 1. Six Project Review

- Have your account on the on the software portal managed (suspended, but opened to submit your reviewed projects), whilst you carry on your next six (6) projects.
- Your DMN Mentor will work closely with you on these six (6) projects from the commencement of Tier 4.
- Each of your six projects must be reviewed in collaboration with your mentor via ZOOM meetings/email/phone to ensure an acceptable level of competency and compliance has been demonstrated before uploading to the portal and the NatHERS Certificate generated.
- If, at the conclusion of mentoring for your first six projects, the DMN Mentor is satisfied you have demonstrated an acceptable level of competency, suspension will be lifted.
- This option offers the least disruption to your business operations and most positive outcomes.
- To ensure you continue to demonstrate industry best practice competency and compliance, another project may be selected from the portal for review within 90 days of completion of the Six Project Review.

## 2. Eight Hour Mentoring Program

- EEA Members may elect to undertake a minimum of eight (8) hours of EEA education with a DMN EEA Mentor.
- During this phase your account on the portal/s will remain suspended.
- At the completion of eight (8) hours mentoring and the Mentor is satisfied that acceptable competency is demonstrated, your account on the portal/s will be reactivated.
- To ensure you continue to demonstrate industry best practice competency and compliance, another project may be selected from the portal for review within 90 days of completion of the Six Project Review.

## 3. Suspension of NatHERS Accreditation

- You may elect to suspended your EEA status for a grace period of up to six (6) months from when DMN first notifies you of your suspension.
- During this six month grace period, your account on the portal/s will remain suspended, blocking you from submitting projects and you must engage with software re-training by a NatHERS approved training provider.
- Upon expiry of the six (6) month grace period, DMN will move your status from suspended to non-Accredited if there has been no engagement in skills development activities and competency has not been demonstrated.
- Your current membership with DMN will not be affected and you will continue to receive member benefits as classified under your membership category for as long as your membership fees are paid.
- DMN is obliged under the NatHERS protocol to notify NatHERS and the other AAOs if a member is no-longer accredited.

At a later date if you would like to re-apply for DMN EEA Accreditation, you will be required to undertake the ***DMN Upskill Now Masterclass – Correctly Interpret and Model Building Elements (3 CPD points)*** and participate in the Six Project Review (3 CPD points), and attain remaining outstanding CPD requirements for your CPD year.

To ensure you continue to demonstrate industry best practice compliance, another project may be selected from the portal for review within 90 days of completion of the Six Project Review.

**DMN reserves the right to vary the Quality Assurance Procedures outlined in this document in instances of repeated QA fails and /or very low QA results that indicate the Assessor would benefit from additional support.**

### Privacy and Confidentiality

DMN, its employees, contractors, agents and volunteers are bound by a Non-disclosure Agreement governed by the Laws of Victoria and the NatHERS AAO Protocol.

All information provided in the course of conducting a Quality Assurance Audit and/or Mentoring of a Design Matters National Thermal Performance Assessor Member for the purposes of adhering to the NatHERS Protocol as an Assessor Accrediting Organisation will be kept confidential. We will not disclose your personal information to a third party without your consent, unless we are required or authorised to do so by law or other regulation.