EPC Research session:
Scheme representatives workshop

Monday 25th February | 5 external attendees (1 representative from 5 schemes)

Agenda

- Overview of research aim to get an understanding of stakeholders and their needs
- Brainstorm current and potential register stakeholders
- Understand current uses of the register and areas for improvement

Notes from discussion

Things that are working:

● Digital certificates work well and provide a good level of control over the access to the register
● The overall process of lodging EPC data is ok - it's the other parts of the service that can be cumbersome
● Statistics currently available on the site give an indication of when there have been changes in the market i.e an increase of EPC requests due to a new government initiative
● The monthly report of data scheme representatives have lodged allows schemes to reconcile their data and highlights any lodgements that have failed.

Must haves (BETA)

● Roadmap of the changes with milestones
● Transitional approach to change is needed to ensure that all schemes are able to comply
● Regular involvement in the defining of changes
● Delivery of core register features: lodge EPC data, upload assessor details, reference address
● Access to the register data so that more effective quality checks and audits can be done

Areas for improvement

Regular communication

- There seems to be a lack of understanding of the schemes and the services they provide
- Schemes do not feel involved in the discussions/defining of upcoming changes to register services
- Change request are not always adequately defined for schemes to be able to build from them without further enquiries

Centralised location of assessor info

- A universal unique identifier is needed for assessors so that they can be tracked across schemes
- Individual schemes currently manage assessors but this is not effective and should be done centrally
- Additional information is needed when an assessor is suspended from a scheme - currently schemes have to manually query the suspension with each other.
- There should be an indication of who employs the assessor on the EPC

Improvements to data collection

- Schemes want to be able to improve the quality of the data by supplying reasons for the following scenarios:
  - status changes of an EPC (i.e 'cancelled due to error'),
  - transaction reasons for lodging an EPC (i.e 'Green deal initiative')
  - suspension reasons for an assessor (i.e 'failed to submit evidence for audit')
- Provide users with the ability to flag suspicious changes/lodgements to help highlight fraud

Data access

- There is a disconnect between the level of data collected and the EPC generated. Property owners want to be able to access the underlying data about their property so that they can make effective improvements - this is not currently possible as the data cannot be given back to them.
- Data analysis features/access is needed to allow schemes to quality checks
- The lack of access to data across schemes means that auditing assessors and lodgement is not as effective as it could be
- The ability to see historic lodgements and certificates to help with auditing

NB: the current workaround for this is that some stakeholders will create their own database

Addresses

- Address data can be frustrating
  - The use of a register specific UPRN instead of the universal one
- An EPC has to be lodged against the same address to maintain continuity, for non-domestic properties with business names in the address this means that the address has to be updated every time the business name changes

General understanding of EPCs

- Customers currently don't understand the purpose of an EPC and how it relates to the efficiency of their property. As such complaints are sometimes received querying the mismatch between the EPC and the actual bills of the property.
- Recommendations on the EPC don't always take into account the financial cost vs actual value of making the improvement to the property
- Currently only high security government buildings or special laboratories (i.e animal testing) request to opt out at the time of the assessment but there is currently no option for this in the lodgement process

Payment structure

- There needs to be better timing of changes to fees - invoices are sent at the beginning of the month and the fee changes come into effect in the middle of an invoicing cycle
- 'Pay as you go' lodgement is not an ideal way forward - especially for large companies where managing the use of this would be difficult

NB: Current payment flow for schemes:

Landmark sends invoice to scheme → scheme invoices assessor (individual) or organisation (multiple assessors)

Software

- The software has two uses:
  - Engine to process data for EPC
  - UI to input data
- Timeouts on lodgements are seen in discrepancies between the figures the scheme has and the monthly report that Landmark sends
- Having a centralised API as an option to replace the software's need to process data was well received

NB: 3rd party software can't lodge to register - only a scheme's software can

Clarity

- Currently there is not much clarity on what it actually costs to run the register

Future developments

- Currently the EPC document is only a snapshot of time - is a live EPC possible?
- Linking EPC data to smart metre data would give a better picture of the energy efficiency of a property