



Name	
Sterling Tracking ID	
Date completed	
Contact Telephone Number	
Email Address	

NOS Unit/Element	Unit/Element Title	Performance Criteria				Knowledge & Understanding			
		Evidence from application form and numbering				Evidence from application form and numbering			
1	Work in a safe effective and professional manner Scope : the office / any other location you visit in the course of your work								
1.1	Contribute to the maintenance of health, safety and security at work								
1.1.1	Carry out working practices in accordance with legal requirements								
1.1.2	Identify any health, safety and security risks and minimise/mitigate such risks								
1.1.3	Ensure your own actions do not endanger yourself or others.								
1.1.4	Follow workplace policies and safely use equipment, materials and products								
1.1.5	Follow emergency procedures effectively								
1.1.6	Pass on suggestions for safety improvements								
	You must know and understand:								
1.1.a	Legal duties for health, safety and security in the workplace								
1.1.b	What risks might exist in different locations and actions to minimise/mitigate								
1.1.c	The importance of remaining alert to risks that are present								
1.1.d	The importance of personal conduct in maintaining health and safety								
1.1.e	Suppliers/manufacturers' instructions for safe use of equipment/products/materials								
1.1.f	Who to inform in case of conflicting health, safety and security requirements								
1.1.g	Emergency procedures for different type of emergency								
1.1.h	Appropriate suggestions for improving health, safety and security at work and who should be given them								



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1	Work in a safe effective and professional manner									
1.2	Develop and maintain effective working partnerships									
1.2.1	Develop and maintain productive working relationships with others									
1.2.2	Request information in a polite, clear and professional manner									
1.2.3	Respond promptly to enquiries from others and ask questions if required									
1.2.4	Take appropriate action if not able to respond to requests									
1.2.5	Handle and resolve issues and minimise offence/maintain reputation									
1.2.6	Comply with formal complaints procedures									
	You must know and understand:									
1.2.a	Why it is important to promote goodwill and trust when working with others									
1.2.b	How to identify the information you require and the potential sources									
1.2.c	How to respond to enquiries and clarify needs									
1.2.d	How to respond to enquiries beyond your competence/authority									
1.2.e	Ways to resolve issues whilst minimising offence									
1.2.f	Details of the appropriate formal complaints procedure									



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1	Work in a safe effective and professional manner									
1.3	Conduct Energy Assessments in a professional and Ethical Manner									
1.3.1	Present a positive personal and professional image at all times									
1.3.2	Work in accordance with codes of conduct, ethical standards & good practice									
1.3.3	Develop yourself within your role									
1.3.4	Manage your own work activities									
1.3.5	Deal with others in a tactful, courteous and equitable manner at all times									
1.3.6	Work within the limits of your own competence and expertise									
1.3.7	Recognise and respond appropriately to pressure from any person									
1.3.8	Recognise and Manage any potential conflicts that may arise									
1.3.9	Comply with the auditing and monitoring requirements									
1.3.10	Comply with all legislation relevant to your work									
1.3.11	Have regard to all relevant guidance relating to the assessment									
	You must know and understand:									
1.3.a	Why it is important to present a positive personal and professional image									
1.3.b	Specific responsibilities prescribed codes of conduct & ethical standards									
1.3.c	The importance of complying with recognised good practice									
1.3.d	The importance of not working beyond these limits									
1.3.e	Managing potential conflicts of interest that you may encounter									
1.3.f	Specific auditing or monitoring requirements that relate to your registration									
1.3.g	UK Government policy on Climate Change and the reduction of carbon									
1.3.h	Legislation relevant to your work – be it derived from the Housing Act 2004 and associated Regulations for Home Information Packs or the European Performance of Buildings Directive (EPBD) and its associated Regulations									
1.3.i	Official guidance relating to the assessment of energy performance									



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2	Prepare for energy assessments of air conditioning systems									
2.1	Performance Criteria; You must be able to									
2.1.1	Confirm the date, time and location of the on-site inspection									
2.1.2	Confirm any specific arrangements that apply to the energy assessment									
2.1.3	Contribute to the preparation of a clear and comprehensive scope of works									
2.1.4	Identify any circumstances that prevent you from undertaking an assessment									
	You must know and understand:									
2.1.a	Overall aim of the energy assessment of air conditioning systems and report									
2.1.b	Importance of confirming the date, time and location of the inspection									
2.1.c	The importance of confirming specific arrangements									
2.1.d	Importance of agreeing a clear and comprehensive scope of works									
2.1.e	How to identify and explain any circumstances preventing you from undertaking an energy assessment									



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3	Inspect simple / packaged air conditioning systems								
3.1	Information relating to energy performance of air conditioning systems								
3.1.1	Ensure that the client understands what information is essential / optional								
3.1.2	Take appropriate action where information is not forthcoming								
3.1.3	Review available information and identify which is relevant								
3.1.4	Review available information provided and identify any significant factors								
3.1.5	Inform the client promptly in cases where your investigation reveal problems								
	You must know and understand:								
3.1.a	Range of information that may be available to the air conditioning system								
3.1.b	The potential sources of relevant information								
3.1.c	What information is 'essential', 'desirable' and 'optional'								
3.1.d	The action to take when information is not forthcoming								
3.1.e	How to review available information								
3.1.f	How to review information in order to identify significant factors								
3.1.g	Identify circumstances that prevent the completion of the assessment								



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3	Inspect simple / packaged air conditioning systems								
3.2	Inspect simple / packaged air conditioning systems								
3.2.1	Ensure that you have the equipment and resources needed for inspection								
3.2.2	Use equipment correctly and interpret data accurately								
3.2.3	Identify yourself those present at the property before inspection								
3.2.4	Identify any circumstances that prevent you continuing the inspection								
3.2.5	Undertake methodical visual inspection of all relevant aspects of the system								
3.2.6	Carry out any specific, non hazardous techniques that have been included								
3.2.7	Make accurate observations and measurements necessary for assessment								
3.2.8	Obtain all additional information that is needed about the system								
3.2.9	Make further investigations where observations and inconsistent								
3.2.10	Follow the correct procedures for collecting information								
3.2.11	Draw the clients attention to obvious instances of inadequate maintenance								
	You must know and understand:								
3.2.a	The principles and theory of how air conditioning systems work								
3.2.b	The components and controls of air conditioning systems								
3.2.c	How to identify the type, features and location of systems								
3.2.d	The design intent of the installed systems and impact of any changes								
3.2.e	What equipment and resources are needed								
3.2.f	Detailed inspection requirements that apply (CIBSE methodology)								
3.2.g	The definitions and conventions embodied (CIBSE methodology)								
3.2.h	How to conduct the survey in a thorough, methodical and consistent method								
3.2.i	How to carry out any specific, non hazardous techniques within scope								
3.2.j	How to make accurate observations and take accurate measurements								
3.2.k	How to make further investigations where observations are inconsistent								
3.2.l	The requirements and application of relevant regulations / standards								
3.2.m	The factors which are relevant to determining the energy performance								



3.2.n	How to collate information to assess the energy performance of systems								
3.2.o	The types of advice that can be provided to clients during inspections								
3.2.p	The sources of information and advice about energy performance								



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		Evidence from application form and numbering				Evidence from application form and numbering			
3.3	Inspect simple / packaged air conditioning systems								
3.3	Record inspection findings								
3.3.1	Produce complete, accurate and legible records of your findings								
3.3.2	Record clearly, if necessary, where and why accurate inspection has not been possible								
3.3.3	Sign and date your records in order to validate when and by whom they were produced								
	You must know and understand:								
3.3.a	The methods, formats and conventions for recording data and information								
3.3.b	The required data and information relating to the system and performance								
3.3.c	The level of detail within your records to produce a comprehensive report								
3.3.d	The importance of producing records that are complete and accurate								
3.3.e	Why it is necessary and important to record why accurate inspection has not been possible								
3.3.f	The importance of validating your records								
3.3.g	The purposes for which your records may be used								



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		Evidence from application form and numbering				Evidence from application form and numbering			
4	Inspect complex / central air conditioning systems								
4.1	Review information relating to the energy performance								
4.1.1	Ensure client understands what information is essential /desirable / optional								
4.1.2	Take appropriate action where information is not forthcoming								
4.1.3	Review available information and identify which is relevant								
4.1.4	Review available information provided and identify significant factors								
4.1.5	Inform the client promptly where your investigations reveal problems								
	You must know and understand:								
4.1.a	The range of information that may be available relating to the system								
4.1.b	The potential sources of relevant information								
4.1.c	What information is essential/desirable/optional pre inspection								
4.1.d	The action to take in cases where information is not forthcoming								
4.1.e	How to review available information in order to identify which is relevant								
4.1.f	How to review available information in order to identify significant factors								
4.1.g	How to identify circumstances that prevent you from assessing performance								



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		Evidence from application form and numbering				Evidence from application form and numbering			
4	Inspect complex / central air conditioning systems								
4.2	Inspect complex / central air conditioning systems								
4.2.1	Ensure that you have the equipment and resources needed for inspection								
4.2.2	Use equipment correctly and interpret data accurately								
4.2.3	Identify yourself those present at the property before inspection								
4.2.4	Identify any circumstances that prevent you continuing the inspection								
4.2.5	Undertake methodical visual inspection of all relevant aspects of the system								
4.2.6	Carry out any specific, non hazardous techniques that have been included								
4.2.7	Make accurate observations and measurements necessary for assessment								
4.2.8	Obtain all additional information that is needed about the system								
4.2.9	Make further investigations where observations and inconsistent								
4.2.10	Follow the correct procedures for collecting information								
4.2.11	Draw the clients attention to obvious instances of inadequate maintenance								
	You must know and understand:								
4.2.a	The principles and theory of how air conditioning systems work								
4.2.b	The components and controls of air conditioning systems								
4.2.c	How to identify the type, features and location of systems								
4.2.d	The design intent of the installed systems and impact of any changes								
4.2.e	What equipment and resources are needed								
4.2.f	Detailed inspection requirements that apply (CIBSE methodology)								
4.2.g	The definitions and conventions embodied (CIBSE methodology)								
4.2.h	How to conduct the survey in a thorough, methodical and consistent method								
4.2.i	How to carry out any specific, non hazardous techniques within scope								
4.2.j	How to make accurate observations and take accurate measurements								
4.2.k	How to make further investigations where observations are inconsistent								
4.2.l	The requirements and application of relevant regulations / standards								
4.2.m	The factors which are relevant to determining the energy performance								



4.2.n	How to collate information to assess the energy performance of systems								
4.2.o	The types of advice that can be provided to clients during inspections								
4.2.p	The sources of information and advice about energy performance								



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		Evidence from application form and numbering				Evidence from application form and numbering			
4	Record Inspection Findings								
4.3	Record inspection findings								
4.3.1	Produce complete, accurate and legible records of your findings								
4.3.2	Record clearly, if necessary, where and why accurate inspection has not been possible								
4.3.3	Sign and date your records in order to validate when and by whom they were produced								
	You must know and understand:								
4.3.a	The methods, formats and conventions for recording data and information								
4.3.b	The required data and information relating to the system and performance								
4.3.c	The level of detail within your records to produce a comprehensive report								
4.3.d	The importance of producing records that are complete and accurate								
4.3.e	Why it is necessary and important to record why accurate inspection has not been possible								
4.3.f	The importance of validating your records								
4.3.g	The purposes for which your records may be used								



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5	Report on the energy performance of air conditioning systems								
5.1	Report on the energy performance of air conditioning systems								
5.1.1	Assemble / collate information from on-site inspection and relevant sources								
5.1.2	Recommendations for measures to improve the system performance								
5.1.3	Prepare and issue a report that meets relevant codes of practice/standards								
5.1.4	Explain the recommendations included within the report and implications								
	You must know and understand:								
5.1.a	The prescribed format and content of a report (CIBSE methodology)								
5.1.b	The range and measures that may improve the energy performance								
5.1.c	The importance of checking the report to ensure its clear and complete								
5.1.d	Explain the recommendations included within the report and implications								
5.1.e	The limitations on answers to queries about the report								
5.1.f	The sources of further information and advice which you could refer								