



elmhurst  
energy

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Guidance for undertaking  
energy assessments following  
good practice social distancing  
techniques



## Introduction

Now that the government has determined that it is permissible for Energy Assessors to undertake energy assessments, Elmhurst has produced a few suggestions that members might like to consider.

This guide is aimed at keeping both the building occupants and the Energy Assessor safe and well.

**Important Note:** Please note that the "Stay At Home" advice in Scotland, Wales and Northern Ireland remains unchanged.

## Guidance

### When making the booking, the assessor should consider:

1. Arranging a suitable date and time for the assessment to be carried out.
2. Explaining how the assessment process will take place and ask that they are happy to abide by the rules before an assessment can proceed.
3. Asking whether on the agreed day/time the property will be likely vacant or occupied.

### If the property is likely to be vacant:

4. Arrange access via either:
  - a. Assessor to collect (and return) keys using safe social distancing practices
  - b. Key holder to open external doors prior to assessor entering the property and then they wait in either their car or outside whilst the assessment is carried out.

Proceed to step 10

### If the property is likely to be occupied:

5. If the property is normally occupied, whether or not the property will be vacant at the time of assessment, confirm that all occupants are currently well with no symptoms of Coronavirus.

Proceed to step 6



**(If likely to be occupied) Prior to Arrival, the assessor should:**

6. Call the building owner immediately prior to entering the property (e.g. from their car) checking that all occupants are still well and nobody has any signs of Coronavirus.
7. Explain the purpose of the visit and what it will entail, with particular focus on the additional safeguards designed to minimise infection
8. Talk through the layout of property e.g. Location/presence of a loft hatch, any extensions, the main heating (boiler) location, secondary heaters, Gas or Elec meter locations, LPG/Oil tanks etc. All in an effort to maximise the efficiency of the assessment within the property.
9. Ask if internal doors and access panels can be left open, to minimise contact of door handles whilst undertaking the assessment and that surfaces have been cleaned with household cleaning products in line with public health advice.

Proceed to step 11

**(If likely to be vacant) Prior to Arrival, the assessor should:**

10. Contact the key holder to check that the property is still vacant e.g. has no work being carried out by tradespeople

Proceed to step 11

**Assessment, the assessor should:**

11. Assessors should wash their hands immediately upon entering the property, using separate towels or paper towels which need to be washed or disposed of safely after use. Alternatively, assessors may wish to put on clean disposable protective gloves prior to entering the property and a face mask should be worn if the property is not vacant.
12. Approach the property and, unless vacant or unless you have just spoken on the phone, explain the purpose of the visit and what it will entail, with particular focus on the additional safeguards designed to minimise infection.
13. Occupant requested to leave the door unlocked and anyone in the property is requested to go into one convenient 'designated' room (e.g. living room) taking any pets with them. If the property is open plan, then social distancing rules should apply.
  - a. If a tradesperson(s) is present – either ask to leave property or use the designated room approach. If neither approach is possible, abort the assessment and reschedule.
14. Take necessary external photos e.g. front and side photos on way to access door.



15. Enter the property and undertake the assessment of the entrance floor excluding the 'designated' room, then proceed to upper/lower levels taking photographs/evidence, so as not to need to go back up or downstairs.
16. Take external photos of rear/side and whilst this is being done, the occupants to go to a second 'designated' room suggest upstairs (or a separate room) so that the original designated room (e.g. living room) can be completed.
17. Leave the property, informing the occupiers that you have left.
18. Take any remaining external photos.

### Upon completion, the assessor should:

19. Wipe down and sanitise any equipment used in the audit e.g. ladders, clipboard, tablet, phone, camera, tape measure(s) with appropriate antiviral cleaner.
20. Remove disposable gloves placing them inside out, into a bag, so as not to have to touch them again, for safe disposal.

#### Please note:

- This guidance is not designed to be exclusive and an Energy Assessor is responsible for undertaking their own risk assessment and working safely.
- Government and NHS guidance is always to be followed and takes precedence
- No work should be carried out by a person who has coronavirus symptoms, however mild or anyone who has been asked to self-isolate.
- Assessors should be clear in any reports about areas which they weren't able to inspect due to public health limitations.
- This Guidance was good at the time of writing
- Most importantly please stay safe and well

### Special Thanks

Elmhurst is very thankful to our member Chris Gowland of EPC-Guy who suggested many of the above points and who emailed us with his thoughts and ideas.



## Contact Details

Should you require any further clarification please contact us at:



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