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1 Overview

You can use JPA Designer to lodge and issue on-construction EPCs for new dwellings.

The main steps in the lodgement and issue process are:

- 1 Carry out the SAP 9.81 calculation, taking account of any changes to the design made during construction, so the calculation is ‘as built’.
- 2 Obtain the Unique Property Reference Number (UPRN) for the dwelling, using the functionality in the software.
- 3 Lodge the EPC and accompanying data with Landmark, via the accreditation scheme.
- 4 Issue the EPC to your client.

The rest of this document describes those steps in more detail.

2 Initial requirements

There are a number of requirements which must be in place before you can issue an EPC for a dwelling:

- ◆ You must be currently registered with accreditation scheme and have received your accreditation number, user name and password.
- ◆ Your computer must have an active internet connection in order to be able to communicate with the accreditation scheme's computers (these computers will be referred to as the servers).

3 Entering your user details

Before you can issue an EPC you must enter your accreditation scheme details into JPA Designer using the **Energy Assessor Accreditation Details** dialogue.

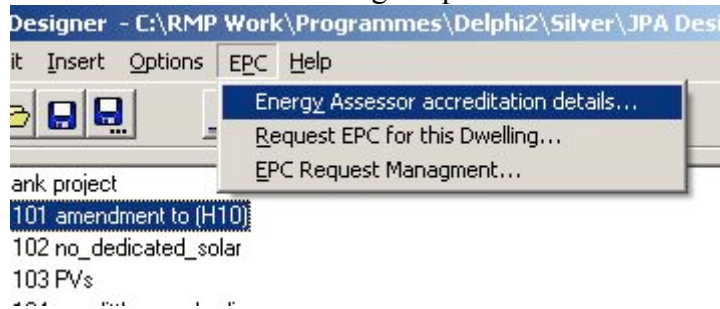
Scheme name	EPC Solutions
SOAP URL	http://www.epcmanager.org/epcDevelopment/Service.asmx
Accreditation number	ECMK200000
Username	
Password	
Company	Barney Rubble
Assessor name	Mr Barney Rubble
Address 1	100 Rocky Road
Address 2	Beds
Address 3	
Post-town	Bedrock
Postcode	BK1 1UU
'phone	0777 123456
fax	0777 123456
email	barney@rubble.com
web address	not supplied
Related party disclosure	Only me!

The Energy Assessor Accreditation Details dialogue holds the following details:

- ◆ **Scheme name:** The name of the On Construction EPC accreditation scheme of which you are a member.
- ◆ **Accreditation number:** Your unique accreditation number for that scheme.
- ◆ **User name and password:** Your log-on details for the accreditation scheme's servers.
- ◆ **Contact details:** Your contact details, which are stored on the accreditation scheme's servers.
- ◆ **Related party disclosure:** The regulations regarding EPCs require an assessor to declare any financial or family relationship with the party who is building or selling the dwelling. You would have to make a disclosure if, for example, you are issuing EPCs for houses built and sold by your employer, or for a house built by a member of your immediate family. You can obtain further information on the form such a related party disclosure should take from your accreditation scheme.

To enter your accreditation details:

- 1 Select **EPC>Energy Assessor accreditation details** from the menu bar. The **Energy Assessor Accreditation Details** dialogue opens.



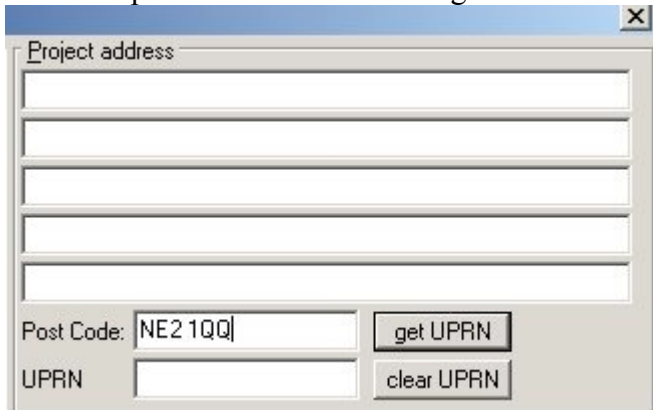
- 2 Select the name of the accreditation scheme to which you belong using the **Scheme name** dropdown.
- 3 Enter your **user name** and **password**.
- 4 Click the **Look me up** button. JPA Designer now connects to the accreditation scheme's server and obtains the address and other contact details which have been registered against your accreditation number. This process may take a few moments.
If details obtained from the server are not correct you should contact the accreditation scheme to update them.
- 5 If you have to make a related party disclosure you should type the disclosure details in the **Related party disclosure** box.
- 6 Click **Close** to close the dialogue and save the data.

4 Obtaining the UPRN for the dwelling

Every dwelling has a unique property reference number (UPRN) which is stored on a national database. Before you can issue an EPC for a dwelling you must obtain its UPRN. JPA Designer uses the Project Information dialogue to look up and store the UPRN for each property.

To look up a property's UPRN:

- 1 Open the **Project Information** dialogue from the menu bar or tool bar.
- 2 Enter the post code for the dwelling in the **Post Code** box of the **Project address** section.



The screenshot shows a dialog box titled "Project address" with a close button (X) in the top right corner. It contains four empty text input fields stacked vertically. Below these fields, there is a "Post Code:" label followed by a text box containing "NE2 1QQ". To the right of this text box is a button labeled "get UPRN". Below the "Post Code" text box is a "UPRN" label followed by an empty text box. To the right of this text box is a button labeled "clear UPRN".

- 3 Click the **get UPRN** button. The **UPRN Address** dialogue opens, with the post code from the **Project Information** dialogue in the **Postcode** box.



The screenshot shows a dialog box titled "UPRN Address" with a close button (X) in the top right corner. It contains the following text: "Enter a Postcode and press, 'Look-up...' button then select the address from the list and press 'Look-up UPRN...' button". Below this text is a "Postcode" label followed by a text box containing "NE2 1QQ". To the right of this text box is a button labeled "Look-up...". Below the "Postcode" text box is a "Matching addresses:-" label followed by a large empty text area.

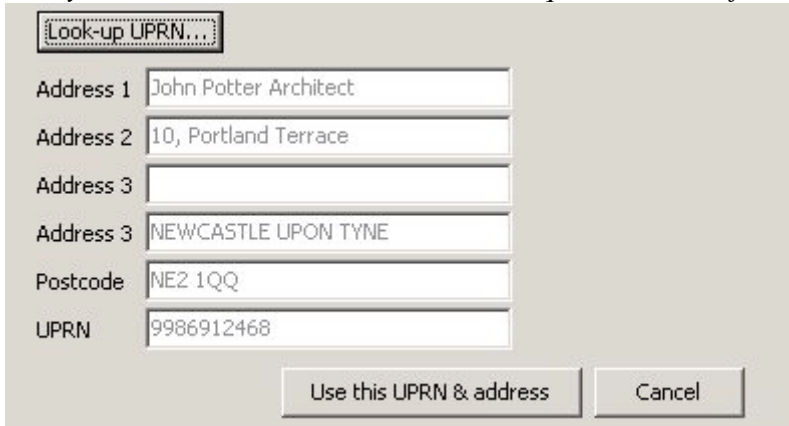
- 4 Click the **Look-up** button. The software connects to the accreditation scheme's server and downloads a list of the addresses which match that post code.



The screenshot shows the "UPRN Address" dialog box with the "Look-up..." button clicked. The "Matching addresses:-" text area now contains a list of addresses. The first three addresses are highlighted in blue, and the fourth is partially visible. The addresses are: "Lugano, 9 Portland Terrace, NEWCASTLE UPON TYNE, NE2 1QQ", "Metro Industrial Holdings, 9 Portland Terrace, NEWCASTLE UPON TYNE, NE2 1QQ", "John Potter Architect, 10 Portland Terrace, NEWCASTLE UPON TYNE, NE2 1QQ", and "Browne Smith Baker Lib. 11-12 Portland Terrace. NEWCASTLE UPON TYNE. NE2 100".

- 5 Click on the address which matches that of the dwelling for which you intend to produce an EPC, then click the **Look-up UPRN** button. The software requests the UPRN from the server and displays it.

If there is no matching address it may well be that the dwelling does not yet have a UPRN. In that case you should contact Landmark and request a UPRN for the dwelling.



Look-up UPRN...

Address 1 John Potter Architect

Address 2 10, Portland Terrace

Address 3


Address 3 NEWCASTLE UPON TYNE

Postcode NE2 1QQ

UPRN 9986912468

Use this UPRN & address Cancel

- 6 If the address is correct click **Use this UPRN & address**. The **UPRN Address** dialogue closes, leaving the **Project Information** dialogue with the address and UPRN.



Project address

John Potter Architect

10, Portland Terrace

NEWCASTLE UPON TYNE

Post Code: NE2 1QQ

UPRN 9986912468

get UPRN clear UPRN

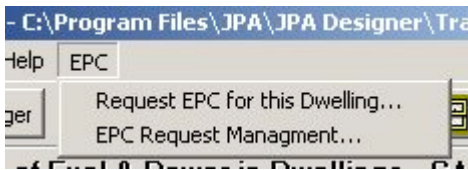
Because the UPRN refers to a specific address the software does not allow you to edit the address when a UPRN has been selected. If you need to change the address click **Clear UPRN**.

5 Lodging an EPC

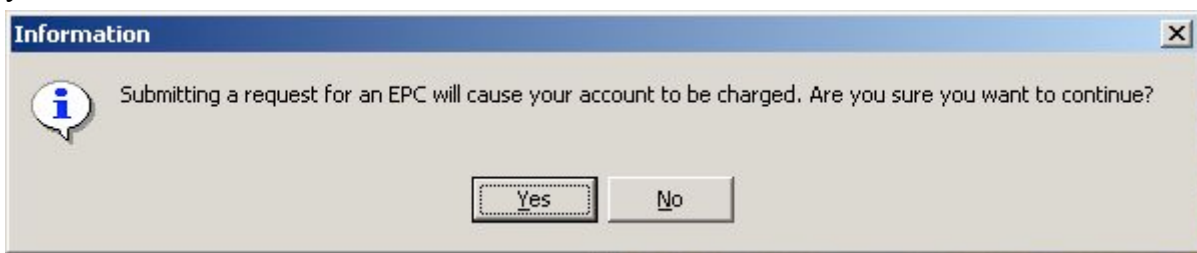
An EPC can only be issued once it has been lodged with Landmark. You should only attempt to lodge an EPC once a calculation has been finalised, and you have obtained the UPRN for the property.

To lodge an EPC:

- 1 Save the project.
- 2 From the menu bar select **EPC>Request EPC for this dwelling ...**



- 3 The software displays a reminder that submitting a request for an EPC will result in a charge on your account with the accreditation scheme.



- 4 To continue to issue an EPC click **Yes**. Otherwise click **No**.
- 5 The software checks that all the details necessary for the EPC have been completed and prompts you for any missing items. Should you receive a prompt, such as that below, simply provide the missing information then try again.



- 6 Once you have successfully asked for an EPC to be lodged the program generates the submissions for Landmark then opens the EPC Preview dialogue.

Energy Performance Certificate

Woodlands
Ridley Mill
STOCKSFIELD
NE43 7QU

Dwelling type: Mid-terrace house
Date of assessment: 22 Mar 2008
Date of certificate: 25 April 2008
Reference number: 0000-0000-0000-0000-0000
Total floor area: 94 m²

This home's performance is rated in terms of the energy use per square metre of floor area, energy efficiency based on fuel costs and environmental impact based on carbon dioxide (CO₂) emissions.

Energy Efficiency Rating		Current	Potential
Very energy efficient - lower running costs			
(82 plus) A			
(81-81) B		81	83
(68-80) C			
(56-68) D			
(38-64) E			
(21-38) F			
(1-20) G			
Not energy efficient - higher running costs			

Environmental Impact (CO ₂) Rating		Current	Potential
Very environmentally friendly - lower CO ₂ emissions			
(82 plus) A			
(81-81) B			
(68-80) C		80	81
(66-68) D			
(38-64) E			
(21-38) F			
(1-20) G			
Not environmentally friendly - higher CO ₂ emissions			

England & Wales EU Directive 2002/91/EC

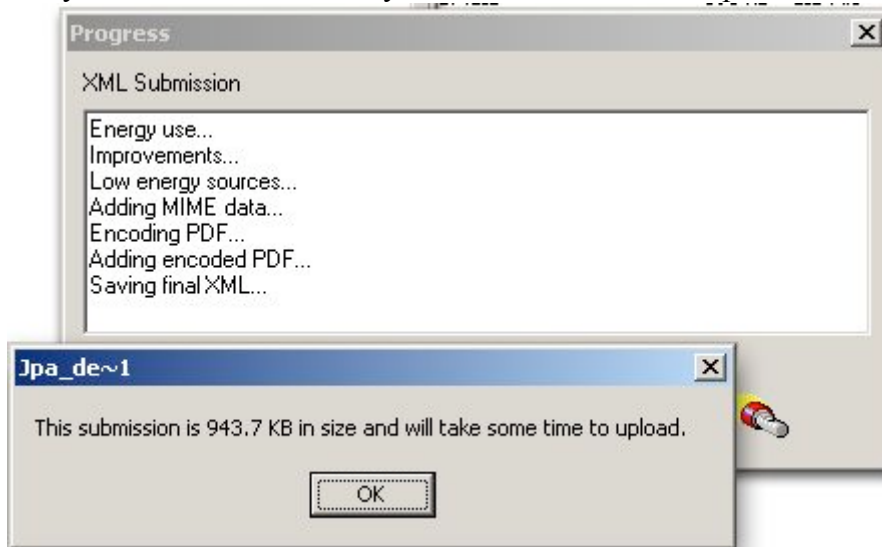
The energy efficiency rating is a measure of the overall efficiency of a home. The higher the rating the more energy efficient the home is and the lower the fuel bills are likely to be.

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.

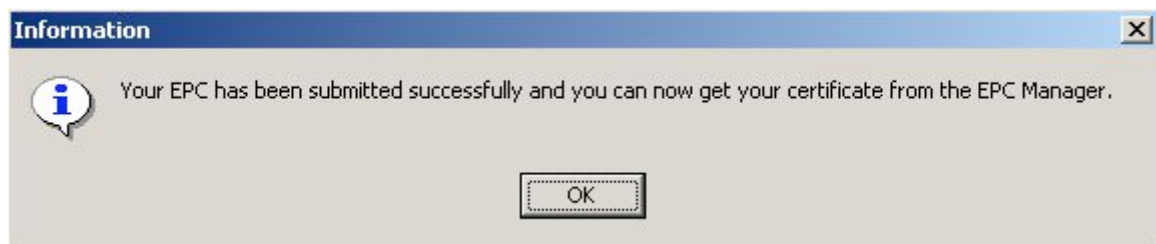
Estimated energy used, carbon dioxide (CO₂) emissions and fuel costs of this home

I approve this EPC, proceed with submission Cancel

- 7 If the EPC appears correct click **I approve this EPC, proceed with submission**. The software will now generate the final EPC and other files for submission to Landmark. Once the files are ready the software will warn you about the size of the upload.

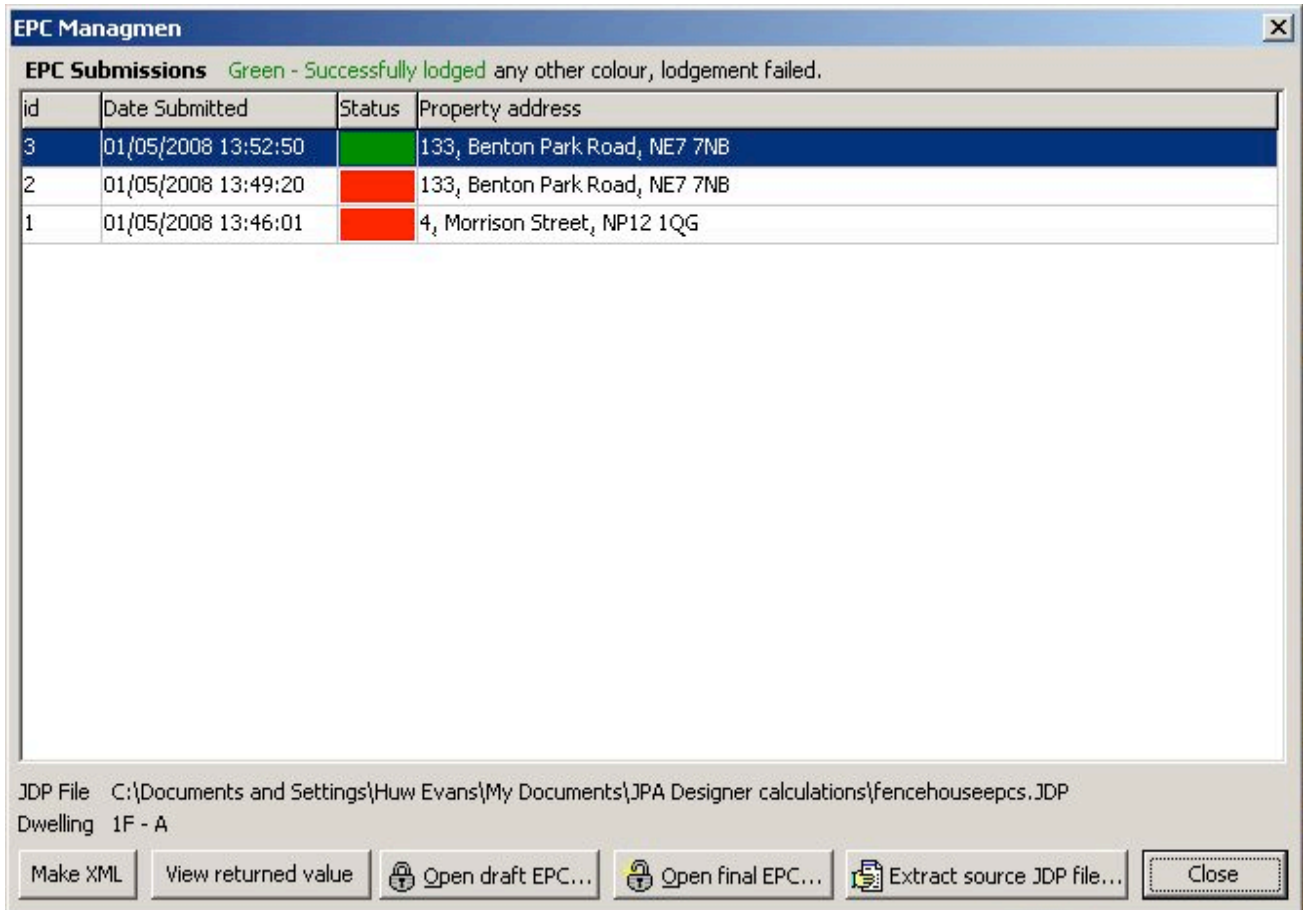


- 8 Click **OK**. The upload begins. When submission is complete the software displays this message:



6 Issuing EPCs

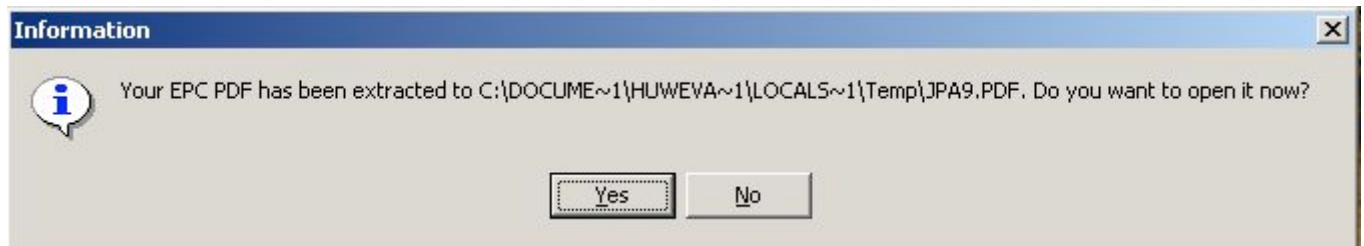
The **EPC Management** dialogue is used to view status of EPC submissions, to issue EPCs which have been lodged, and to deal with any problems arising during the submission process.



The main part of the dialogue is the **Submissions table** which shows the status of all the EPCs you have submitted, with the date and property address. The **Status** column shows whether the EPC lodgement has been successful (green), unsuccessful (red) or is pending (yellow).

Submissions which have been successfully lodged can be opened and printed for issue. To open and print an EPC:

- 1 Select **EPC>EPC Request Management** from the menu bar. The **EPC Management** dialogue opens.
- 2 Check the status of the submission in the **Submissions table**. If the status cell is green the EPC is ready for issuing.
- 3 Select the EPC by clicking on the appropriate row in the **Submissions table**.
- 4 Click the **Open final EPC** button. The software tells you where the PDF file of the EPC has been created.



- 5 Click **Yes** to open the EPC in Adobe Reader. Once the EPC opens you can print it, or re-save it for emailing.

If the PDF does not open automatically you can find the file using Windows Explorer.