



Assessor Accreditation Policy

NatHERS for existing homes

Version: 1.0

OFFICIAL
Assessor Accreditation Policy

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Acknowledgement of Country

We acknowledge the Traditional Owners of Country throughout Australia and recognise their continuing connection to land, waters and culture. We pay our respects to their Elders past and present.

At a glance: Assessor Accreditation

NatHERS for existing homes assessors must be accredited. Accreditation confirms assessors meet and maintain minimum standards of quality and conduct and can competently produce reliable ratings in a safe and ethical manner.

Pre-accreditation training requirements:

Before applying for accreditation, applicants must complete:

- The following units of competency from the Certificate IV course in Home Energy Efficiency and Sustainability (CPP41119):
 1. Manages own work, professional development and ethical behaviour (CPPCOM4001)
 2. Research and assess impact of building elements on thermal performance of residential buildings (CPPHES4001)
 3. Advise clients on thermal performance of residential buildings (CPPHES4002)
 4. Assess household energy use and efficiency improvements (CPPHES4005)
 5. Assess thermal performance of existing buildings (CPPHES4007)
 6. Promote adoption of home sustainability practices (CPPHES4009)
 7. Implement safe work practices in the property industry (CPPCOM4002) *or equivalent
- The training unit Conduct NatHERS Assessments for Existing Homes
- Training in at least one energy rating software tool that will be used to conduct NatHERS for existing homes assessments

Before starting an application for accreditation

Review the NatHERS for Existing Homes Assessor Code of Practice and related NatHERS for existing homes policies and ensure the responsibilities of accredited assessors are clearly understood.

Ensure you, or your employer, have policies and procedures in place for managing privacy and work health and safety, including those required to manage safety incidents or privacy breaches, that comply with NatHERS requirements.

Check you have or are eligible to obtain, required insurances.

Apply for a Nationally Coordinated Criminal History Check Certificate for employment purposes, as a Residential Energy Efficiency Assessor.

Applying for Accreditation

Submit an application, including:

- 1 A completed application form
- 2 A statement of attainment for 7 units of competency from the Certificate IV course in Home Energy Efficiency and Sustainability (CPP41119)
- 3 Evidence of completion of:
 - i. the training unit Conduct NatHERS Assessments for Existing Homes
 - ii. training in at least one energy rating software tool that will be used to conduct NatHERS for existing homes assessments
- 4 A Nationally Coordinated Criminal History Check Certificate

Successfully pass the accreditation exam

You will be sent instructions to complete the NatHERS for existing homes accreditation exam.

Finalise the application. Submit the following:

- 1 Certificates of currency for Public Liability (\$10m) and Professional Indemnity (\$2m) insurances
- 2 A completed declaration of interests form
- 3 A digital passport-style photograph
- 4 A signed Assessor agreement

Approved applications will receive:

- 1 A letter of accreditation with a unique NatHERS for existing homes accreditation number
- 2 A unique NatHERS for existing homes accreditation card
- 3 Supporting documentation including the NatHERS for existing homes Technical Note and Guidance Note.
- 4 Access to the NatHERS Certificate portal to produce Home Energy Rating certificates.

Refused applications will be advised of the reasons why and options for a review of the decision.

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1 Purpose

The Nationwide House Energy Rating Scheme (NatHERS) provides a standardised approach to rating the energy performance of homes throughout Australia. Assessments of existing homes require assessors to enter a home to collect information and input these correctly into NatHERS energy rating tools to generate a Home Energy Rating Certificate.

Home Energy Ratings help Australian households identify cost-effective upgrades to improve the comfort of their home, provide banks more confidence to loan capital to Australians to upgrade the energy performance of their homes, and can be used by state and territory governments to underpin policy and programs. Assessors must therefore be capable of operating in a competent and ethical manner, to ensure the integrity of Home Energy Ratings.

This policy outlines the requirements for NatHERS for existing homes accreditation and should be read in conjunction with the documents listed under Related Information of this policy.

2 Principles

Accreditation supports the scheme to establish and maintain minimum standards of quality. The compliance of assessments and assessor conduct against NatHERS technical requirements and assessor conduct against codes of practice are essential to enabling NatHERS for existing homes to achieve its objectives.

Our approach to accreditation focuses on:

Transparency

Information about how to apply for accreditation and what is expected to maintain accreditation is readily available, easy to understand, and accessible to diverse groups of people.

When an application for accreditation is refused, applicants are given clear reasons for the decision and options for review of the decision.

Impartiality and fairness

Decision-making applies the principles of natural justice and procedural fairness. Decisions must be fully informed and based on the available information and evidence.

Applications must be assessed reasonably, fairly, respectfully and objectively, and without regard for cultural identity, national origin, religion, sex, gender expression, sexual orientation, physical or intellectual ability, socioeconomic status, or other protected personal attributes.

Managing risks proportionally

The accreditation process considers the circumstances of each application and weighs them against the risks to program stakeholders and the integrity of NatHERS ratings.

Decisions about accreditation are proportional to the seriousness of the risk.

3 Training requirements

Before applying for accreditation, prospective applicants must complete:

1. The following units of competency from the Certificate IV course in Home Energy Efficiency and Sustainability (CPP41119):
 - a. Manages own work, professional development and ethical behaviour (CPPCOM4001)
 - b. Research and assess impact of building elements on thermal performance of residential buildings (CPPHES4001)
 - c. Advise clients on thermal performance of residential buildings (CPPHES4002)
 - d. Assess household energy use and efficiency improvements (CPPHES4005)
 - e. Assess thermal performance of existing buildings (CPPHES4007)
 - f. Promote adoption of home sustainability practices (CPPHES4009)
 - g. Implement safe work practices in the property industry (CPPCOM4002) or equivalent as listed on www.training.gov.au
2. The training unit Conduct NatHERS Assessments for Existing Homes
3. Training in at least one energy rating software tool that will be used to conduct NatHERS for existing homes assessments.

4 Preparing to apply for accreditation

Before applying for accreditation:

1. Ensure you have successfully completed all training requirements.
2. Review the NatHERS for Existing Homes Assessor Code of Practice and accreditation policies on the NatHERS website, including:
 - a. NatHERS for Existing Homes Character Check Policy
 - b. NatHERS for Existing Homes Conflict of Interest Policy
 - c. NatHERS for Existing Homes Assessor Performance Management Policy
 - d. NatHERS for Existing Homes CPD Policy.
3. Ensure that you clearly understand the requirements for accredited assessors. Contact the Assessor Accreditation Service Provider (AASP) if you have any questions or concerns.
4. Ensure you, or the business through which you will be conducting NatHERS for existing homes assessments, has:
 - a. **privacy policies and procedures that comply with the Australian Privacy Principles** and the Privacy Act 1988 (Cth), as well as any state or territory privacy legislation relevant in the state or territory where you will conduct Home Energy Rating assessments

- b. **work health and safety policies and procedures** that comply with all relevant state or territory work health safety legislation and other related regulations that apply in the state or territory where you will conduct NatHERS for existing homes assessments.
5. Seek quotes and ensure that you will be able to obtain **professional indemnity (at least \$2 million coverage)** and **public liability (at least \$10 million in coverage)** insurances.
6. Apply for a **Nationally Coordinated Criminal History Check** that complies with the requirements in the NatHERS for Existing Homes Character Check policy.
 - a. Ensure the purpose of the check is described as 'Residential energy efficiency assessor'.
 - b. If you are required to provide a description of the main tasks or duties of the role, it must describe a requirement to enter private homes and collect personal information.

5 Applying for accreditation

Applying for NatHERS for existing homes accreditation is a three-stage process, detailed below.

5.1 Stage 1: Submit an application

For the first stage of accreditation, you must submit the following documents to the AASP:

1. A completed **accreditation application form**, including:
 - c. **declarations of compliance** with **privacy** and **work health and safety** requirements.
 - d. **details of other energy rating schemes** with which the applicant is or has been accredited, licenced, or certified with in the past 10 years.

The AASP may contact other government building energy rating schemes with which you have been accredited/licenced/registered, to obtain information about your accreditation/license/registration status whether you have been subject to any disciplinary measures, and the status of any outstanding remedial actions. Examples of performance history that may indicate 'behaviours of concern' include:

- behaviours or patterns of behaviour that indicate dishonesty
 - behaviours or patterns of behaviour that indicate a disregard for the safety or well-being of others
 - repeated or serious non-compliance with program /scheme rules
 - repeated poor performance in quality assurance reviews or audits
 - repeated or serious substantiated complaints about conduct.
2. A copy of **proof of identity documents** containing your photo, issued by a Commonwealth, state or territory authority. Acceptable documents include an Australian driver's license, a 'passport (Australian or foreign), Australian proof of age card, Australian tertiary student identity card, Australian working with children/vulnerable people card.

If the name on your proof of identity document is different to your current legal name, you will also need documents that show the change from one legal name to the next. Examples of acceptable documents include a marriage certificate, divorce order, civil partnership

certificate, change of name certificate, and deed poll. A statutory declaration is not acceptable as evidence of your change of name.

3. A copy of training qualifications for the required **seven units of competency from the Certificate IV course in Home Energy Efficiency and Sustainability**.
4. The training unit **Conduct NatHERS Assessments for Existing Homes**
5. **Training in at least one energy rating software tool** that will be used to conduct NatHERS for existing homes assessments.
6. A **Nationally Coordinated Criminal History Check** for employment purposes, issued by a provider accredited by the Australian Criminal Intelligence Commission within 6 months of the date the application form is signed by the applicant.

Disclosable court outcomes on your NCCHC Certificate, which indicate 'behaviours of concern', may impact your accreditation. If any are identified, you will be given an opportunity to explain circumstances as relevant and provide relevant information to support your application for accreditation. The AASP will consider all available information before making a decision.

Disclosable 'behaviours of concern' may include:

- fraud or other deceptive conduct
- a disregard for the personal safety and wellbeing of others

More information is available in the NatHERS for Existing Homes Assessor Character Check Policy.

Wherever possible, applications are assessed within 10 business days of the date they are received by the AASP. This timeframe does not include time the AASP may be waiting on additional supporting information or documentation from you.

5.2 Stage 2: Pass an accreditation exam

If the above requirements are met and the officer assessing your application is satisfied you are suitable for accreditation, you will be invited to sit the NatHERS for existing homes accreditation exam. Information about the exam will be sent by the AASP to you by email.

5.3 Stage 3: Finalise the application

If you pass the exam, the AASP will contact you to request the submission of following to finalise the application:

1. A certificate of currency for **professional indemnity insurance**, with at least **\$2,000,000 in coverage**.
2. A certificate of currency for **public liability insurance**, with at least **\$10,000,000 in coverage**.

Your evidence of insurance coverage must clearly show that the insurances specifically cover you. This may mean a certificate of insurance in your name. If you have certificates of insurance in your employer's name, then you will also need evidence that you are insured under your employer's insurance. This evidence may be a letter from your employer, which must be on official company letterhead including the company name, registered office

address, ABN (Australian Business Number) / ACN (Australian Company Number), and contact details.

If you are waiting on new insurance Certificates of Currency, you can still submit the rest of your application for processing. However, your application will not be complete until all insurance documentation has been received and processed.

3. A completed **declaration of interests** form (refer to the NatHERS for Existing Homes Conflict of Interest Policy for more information).

As part of the declaration of interests form, you must propose any steps you will take to manage circumstances that could conflict with your personal interests. If the AASP believes the proposed steps are not sufficient to manage potential conflicts, you will be provided the opportunity to review and update your declaration with additional measures. The AASP may refuse to grant accreditation if agreement on how potential conflicts of interests should be managed cannot be reached.

4. A signed **assessor agreement**.

By signing the agreement, you will be making a legally binding agreement to uphold several promises for the duration of your accreditation, including promises to:

- Comply with the NatHERS for Existing Homes Assessor Code of Practice at all times
- Manage privacy, confidentiality and conflicts of interest in accordance with NatHERS requirements
- Use software and NatHERS documents and other materials only as authorised
- Notify the AASP of any change in circumstances that could reasonably impact accreditation

A failure to abide by the agreement you make could result in the suspension or cancellation of your accreditation, or performance improvement action.

You should seek independent advice before signing the agreement if you wish to do so.

5. A **digital 'passport-style' photograph of yourself**, which will be used to produce your NatHERS for existing homes accreditation card.

The photo you submit should comply with the Australian Passport Office's photo guidelines found at <https://www.passports.gov.au/PhotoGuidelines>.

6. **Payment of accreditation fees** (if any) as quoted by the Assessor Accreditation Service Provider.

5.4 Successful applications

If your application is approved, you will receive:

1. An email from the AASP including:
 - a. A letter of accreditation
 - b. A unique NatHERS for existing homes accreditation number
 - c. Supporting documentation including:
 - the NatHERS for existing homes Client Information and Consent Form
 - the NatHERS for existing homes Technical Note and Guidance Note
 - NatHERS Trademark Guidelines
2. A unique NatHERS for existing homes accreditation card
3. Access to the NatHERS certificate portal to produce Home Energy Rating certificates.

5.5 Refused applications

Your application may be refused if you are unable to meet all the requirements for accreditation outlined in this document.

If you are refused accreditation, the AASP will tell you the reasons why in writing and your options to request a review of the decision.

6 Maintaining accreditation

Your accreditation period commences on the date accreditation is granted, for a period of 12 months. To extend your accreditation for a further 12-month period, you must meet the requirements set out in section A6 of the NatHERS for Existing Homes Assessor Code of Practice. You must demonstrate this before the last day of your current accreditation period.

Failure to meet these requirements may result in your accreditation being suspended or withdrawn. If your accreditation is 'suspended' then you are not permitted to participate in or undertake any part of a NatHERS for existing homes assessment. This includes on-site assessments and generation of certificates.

Sections 6.1 to 6.4 here outline some key requirements for maintaining accreditation. For a complete list of accreditation maintenance requirements, please refer to section A6 of the NatHERS for Existing Homes Assessor Code of Practice.

6.1 Maintaining Valid Insurances

NatHERS accredited assessors must always be covered by valid policies for **professional indemnity insurance (at least \$2 million coverage)** and **public liability (at least \$10 million in coverage)** insurance.

The AASP will suspend your accreditation if either of your insurances appears to be expired. You are responsible for ensuring your insurance coverage is maintained, and for supplying new certificates of insurance to the AASP as soon as they are available to you.

6.2 Continuing Professional Development

NatHERS for existing homes assessors will be required to meet Continuing Professional Development ('CPD') obligations: generally, this is a total of 12 CPD points in a 12-month period (with a minimum of 6 technical training points) in accordance with the requirements of the NatHERS for Existing Homes CPD Policy. The NatHERS for Existing Homes CPD Policy outlines processes for exemptions and flexibility to these CPD requirements.

6.3 Demonstrating Ongoing Competency

To maintain active accreditation, NatHERS for existing homes assessors must complete a minimum of 3 NatHERS for existing homes assessments in each 12-month period and pass an annual knowledge and skills assessment.

Should these requirements not be met, you may be asked to complete training or other performance improvement actions (see the NatHERS for existing homes Assessor Performance Management Policy for more information).

If you fail to complete 3 NatHERS for existing homes assessments in a 12-month period for 3 consecutive years, you may have your NatHERS for existing homes accreditation suspended or withdrawn.

6.4 Performance & Misconduct

NatHERS for existing homes assessors are required to conduct themselves in accordance with the NatHERS for Existing Homes Assessor Code of Practice.

Your NatHERS for existing homes accreditation may not be renewed if unacceptable issues arise with your performance or conduct and, where applicable, you have not completed all identified performance improvement actions within agreed timeframes (or have made appropriate progress towards completing them).

7 Privacy

The Australian Government Department of Climate Change, Energy, the Environment and Water (DCCEEW) administers NatHERS as the 'NatHERS Administrator', on behalf of all state and territory governments. The NatHERS Administrator works with delivery partners, who support accreditation, training and audit activities.

Your personal information will be handled in accordance with the Privacy Act 1988 (Cth) and the Department of Climate Change, Energy, the Environment and Water's Privacy Policy. Your personal information will be used for the primary purpose of administering your accreditation as a NatHERS for existing homes assessor and may be used to contact you for further information required to

clarify certain information contained in your application, to maintain your accreditation status, or for policy development, research or survey purposes.

When accredited, your photograph, full name and accreditation number will be printed on a NatHERS for existing homes accreditation card which you will be provided upon obtaining accreditation.

Your full name, state or territory of residence, employer name, and accreditation number will also be published on the NatHERS external facing website for verification purposes once you are accredited. Your listing on the NatHERS website may also include your contact details and all states and territories you are available to work in, to enable households to contact you. In your application, you may opt out of your contact details being published for these purposes.

The AASP or NatHERS Administrator may provide your personal information (including your accreditation status and performance as a NatHERS for existing homes assessor) to other Commonwealth, state or territory government agencies, as well as to NatHERS for new homes Assessor Accrediting Organisations (AAOs), and/or other third parties acting on the NatHERS Administrator's behalf, for the purposes of administering your accreditation, audit and compliance, policy development, and program delivery. Your personal information may also be disclosed where authorised or required by law.

You can choose not to provide your personal information. However, this may mean that DCCEEW will not be able to accredit you as a NatHERS for existing homes assessor.

DCCEEW takes all reasonable steps to ensure your personal information is protected from misuse and loss and from unauthorised access, modification, or disclosure. Personal information held by DCCEEW is destroyed or de-identified when no longer needed, in accordance with the requirements of the Archives Act 1983 (Cth).

Related Information

- NatHERS for existing homes Assessor Code of Practice
- NatHERS for existing homes Conflict of Interest Policy
- NatHERS for existing homes Character Check Policy
- NatHERS for existing homes Assessor Performance Management Policy
- NatHERS for existing homes Audit Policy
- NatHERS for existing homes CPD Policy
- NatHERS for existing homes Mentoring Policy

Glossary

Term	Definition
AASP	The assessor accreditation service provider (AASP) is the entity that manages the accreditation of NatHERS for existing homes assessors.
Accreditation	The formal approval of an assessor, by an AASP, as someone who is appropriately trained and skilled to conduct assessments.
Assessor	A person accredited to perform NatHERS for existing homes assessments.
Conflict of interest	A circumstance where an assessor holds a personal or business interest that may influence, or be perceived by a reasonable person to influence, any part of a NatHERS assessment.
CPD	Continuing Professional Development, which provides a mechanism for assessors to maintain and improve skills and knowledge.
Home Energy Rating	A NatHERS energy performance rating from 0 to 150, based on the expected energy use, costs and emissions of a home. It considers the shell of a building, together with the fixed appliances in the building (such as heating and cooling, hot water systems, lighting, pool/spa equipment), and any on-site energy generation and storage. The maximum Home Energy Rating that is shown on a Home Energy Rating Certificate is 150 out of 100.
NatHERS Administrator	NatHERS is administered by the Australian Government on behalf of all states and territories. The role of NatHERS Administrator is a function of the Australian Government Department of Climate Change, Energy, the Environment and Water (DCCEEW), or any subsequent Australian Government department that assumes responsibility for residential energy efficiency.
Performance improvement action	Any action that the AASP may require an assessor to take to improve the assessor's performance.
Personal information	Information or an opinion about an identified individual, or an individual who is reasonably identifiable, whether the information or opinion is true or not; and whether the information or opinion is recorded in a material form or not. For example, personal information may include an individual's name, signature, address, phone number or date of birth.