



Title: U-Value competency scheme Code of Conduct

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Revision History

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U-value Competency Register Code of Conduct

This revision of the Code of Conduct shall supersede any previous versions from the date of approval.

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1. GLOSSARY OF TERMS

Within this document, the following terms may be used:

“Scheme” shall refer to The U-value Competency Register, Powered by Quidos;

“Competent person” shall refer to an accredited member of The U-value Competency Register deemed as qualified and competent to act as a U-value competent person.

2. INTRODUCTION

- 2.1. The purpose of this Code of Conduct is to ensure that all U-value competent people registered with The U-value Competency Register, Powered by Quidos produce U-value calculations with the best standards, practice and professional behaviour as well as maintaining the highest standards of professional and ethical behaviour.
- 2.2. All members shall agree to abide by this Code of Conduct, Quidos Terms & Conditions, U-Value Competency Scheme Complaint's Procedure, Disciplinary and Appeals procedure, the U-Value Membership Agreement, Quidos Data Sharing Terms & Conditions and any additional frameworks and standards required as per the members' strand.

3. GENERAL

- 3.1. The competent person shall act in a professional manner at all times.
- 3.2. The competent person shall not undertake any action that brings Quidos Ltd, JPA Technical, or the Regulations that implement it, into disrepute.
- 3.3. The competent person shall agree to abide by the terms of this Code of Conduct, and the U-Value Membership Agreement.
- 3.4. The competent person shall ensure that their work is covered by Professional Indemnity and Public Liability insurance. This coverage shall be provided to, validated and confirmed by Quidos LTD.

4. IMPARTIALITY OF U-VALUE COMPETENT PERSON

- 4.1. Where relevant, the Competent person shall include within the U-Value calculation a declaration of any personal or business relationship (other than in relation to producing the certificate), that they have with: This information should be added as a cover letter with the U-Value calculation.
 - 4.1.1. the person who commissioned the U-value calculations;
 - 4.1.2. any person on whose behalf the U-value calculation was commissioned.
 - 4.1.3. any person who he believes has or may have a personal or business relationship to the person detailed above;
 - 4.1.4. any person who has or may have an interest in the U-value calculations.
- 4.2. The Competent person must also disclose a financial and/or personal relationship with others involved in the transaction, for example where their employer is also the person commissioning the U-value calculation.
- 4.3. If the Competent person is undertaking other professional services relating to the premises, where they are not acting as a U-Value competent person, such services on behalf of the undertaking, must be covered by separate contracts.

5. INSTRUCTIONS TO COMPLETE A U-VALUE CALCULATION

- 5.1. The Competent person must understand and be able to explain to consumers the requirements of U-Values and associated calculations which may change from time to time and the Competent person must keep abreast of current legislation and regulations affecting their work.
- 5.2. The Competent person shall agree to be bound by all Quidos rules and procedures and will be bound by the Quidos disciplinary procedures unless they are overturned by appeal.
- 5.3. The Competent person must be completely familiar with the format, terms on which the U-Value calculation is prepared and explanatory text of the calculation and be prepared to explain any sections or terms to the customer before, during and after the calculation.
- 5.4. The Competent person shall set aside sufficient time for the U-Value calculation.
- 5.5. Any circumstance that might lead to an actual or perceived conflict of interest must be explored by the Competent person with the customer/or the person from whom instructions are received.
- 5.6. The Competent person shall identify and disclose any financial relationships with others involved in the transaction.
- 5.7. The Competent person shall know their limitations, particularly where a calculation may fall outside of their experience or competence. Instructions outside of their U-value calculation expertise must be declined.
- 5.8. The Competent person shall be expected to present themselves in a professional and polite manner at all times; this will include their appearance, language, and general demeanour
- 5.9. The Competent person shall show relevant identification to the customer if requested.
- 5.10. The Competent person shall discuss the following prior to undertaking the U-value calculation:
 - 5.10.1. What information will be required and why.
 - 5.10.2. What the customer should do if they have a complaint about the behaviour of the Competent person or U-value assessment.
- 5.11. The Competent person shall make well-reasoned and documented justifications for the approach taken whilst undertaking a U-value calculation.

6. TIMESCALES

- 6.1. The Competent person must take decisions on the time required to complete a U-Value calculation based on obtaining sufficient information to prepare a U-value calculation that are complete and comprehensive.
- 6.2. There are no set timescales for a U- Value calculation, therefore the Competent person must be aware of the risks resulting from U- Value calculation that are hastily prepared.

7. FEES

- 7.1. If the Competent person provide other professional services for the client, which go beyond the scope of the U-Value calculation, these services must be invoiced separately, from the U-Value calculation charges.

8. RECORDS AND FILES

- 8.1. The Competent person shall maintain securely all completed U-Value calculations and associated evidence packs. The records must be of sufficient detail to enable an unconnected third party to interpret the competent persons inspection findings.
- 8.2. Records must also be kept of all queries, communications etc related to the U-Value calculation.
- 8.3. Records must also be kept if a particular U-Value calculation was not able to be completed.

9. SECURITY OF INFORMATION

- 9.1. The Competent person may come across personal information about the various parties which has no relevance to the calculation. Such information must not be recorded in the record of the U-Value calculation or divulged to third parties save that Competent person must not treat this provision as a reason to ignore their common law duties and responsibilities.
- 9.2. Information obtained by the Competent person shall be confidential where it is not covered by the requirements to provide that information to their Scheme, to the organisation or individual who has commissioned the work, and to other formal requirements associated with Quidos Ltd.
- 9.3. The Competent person must not use any information about the U-Value calculation in any other context without first obtaining the client's written permission.
- 9.4. The Competent person shall keep all records associated with the U-Value calculation and associated evidence packs stored in a safe and secure manner, complying with all relevant National and Supranational Data Protection legislation.

10. HEALTH & SAFETY RISKS

- 10.1. The Competent person must know and comply with the requirements of the Health and Safety at Work Regulations.

11. COMPLAINTS

- 11.1. The Competent person shall respond and actively try to resolve all complaints received, from all groups including customers, and other associated parties.
- 11.2. All complaints received must be subject to the Competent person Complaints Procedure.
- 11.3. The Competent person must inform Quidos Ltd of all complaints received, including the date received, complainants' details, nature of the complaint, and following actions to resolve the complaint. This must be done within 7 days of initially receiving the complaint.
- 11.4. The Competent person must have their Complaints procedure available publicly, e.g. via website, and must inform all customers and clients of the complaints procedure or how to access the Complaints procedure.
- 11.5. The Competent person must record all complaint received, making a note of the date received, complainant, nature of the complaint, following actions and resolution of the complaint.
- 11.6. The competent person must provide details of complaints when requested by Quidos Ltd, the or any other associated body when requested. This must be provided within the specified timeframes.

U-VALUE COMPETENT PERSONS CONFIRMATION

By signing below, the competent person confirms that they have read and understood the Code of Conduct, and agree to abide by these Conditions.

Signature: _____

Name: _____

Date: _____