



**Title:** CPD Guidance for Energy Assessors and Retrofit Assessors

**Issue:** v.2.1

**Issued By:** Isabel Granville **Date:** 06/02/2024

**Approved By:** Billy Say **Date:** 08/02/2024

**Revision History**

Issue	Issued	Approved	Reviewed/ Outline of changes made
1.0	01/04/2011	08/04/2011	
1.1	09/04/2012	09/04/2012	23/02/2015
1.2	03/12/2015		
1.3	19/12/2016	20/12/2016	
1.4	22/03/2017	27/03/2017	
1.5	07/06/2017		
1.6	25/04/2018	15/05/2018 CG	14/03/2019 CG
1.7	15/08/2019	15/08/2019	
1.8	12/11/2020	16/11/2020	RFAs added to procedure/guidance
1.9	24/08/2021	24/08/2021	
2.0	04/01/2022	05/1/2022	15/02/2023 LB
2.1	06/02/2024		Point 11 removed and updated throughout



# Quidos CPD Guidance for Energy Assessors and Retrofit Assessors

**Assessors who qualified and joined the industry within the 12 months preceding their application to join Quidos are exempt from providing CPD evidence in order to obtain accreditation. As soon as they become accredited however they must begin to record their CPD evidence as this will be requested upon their first accreditation anniversary.**

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Quidos Accreditation requires all members to complete a minimum of 10 hours of CPD for each year of accreditation and provide supporting evidence for all CPD they wish to use as part of their annual accreditation requirement.

The exact number of CPD hours an energy assessors will need depends on how many strands of energy assessment you are accredited with Quidos for. As each additional strands will mean 5 extra hours of CPD. For example, if you as an energy assessor are accredited with Quidos as an DEA and NDEA then you will need to complete 15 hours of CPD annually.

If Retrofit Assessor is one of the strands you are accredited for, please see section 2 below for more guidance.

CPD must be fully targeted towards your chosen field(s) of energy assessment. So for example, courses in web design would not gain approval. We do acknowledge that many Energy Assessors are also self-employed or in charge of start-up companies, so CPD in essential business skills can be approved but this is down to the Quidos accreditation team's discretion.

If you are unsure about which of your learning activities can be accepted please ask the accreditation team for guidance, they will be more than happy to guide you.

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## 1) Categories of CPD

Quidos categorizes all CPD into one of two categories, informal or formal. More detailed guidance on these is provided in sections 5 and 6 of this document but please see the definitions of these below:

**FORMAL** = this covers all learning activities where a third-party can confirm your attendance/completion of the event. An example of this is a training course or online CPD module where your attendance has been recorded, the third-party being the training provider. This will also count for all CPD where you receive a certificate of completion or Pass that can be uploaded for CPD.

**INFORMAL** = this covers all self-led learning such as reading or independent research. No third-party confirmation is required; however you will need to provide reading/learning notes to demonstrate what you gained from the learning.



***\*Please note that Qidos will only accept a maximum of 6 hours of informal learning every 12 month period, all remaining hours must be made up of formal learning\****

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## **2) How many hours of CPD evidence do I need to provide?**

If you are already accredited with Qidos or are looking to join our scheme for more than one strand of energy assessment, then you will need to provide 10 hours of CPD evidence for your main strand of energy assessment, plus 5 additional hours of CPD for each additional strand.

*For example; if you are a DEA and NDEA L3, you will need to provide 10 hours of CPD for Domestic Energy Assessment, plus an additional 5 hours of CPD for your NDEA accreditation, totaling 15 hours.*

**However, please note that this is not the case if you are accredited as a Retrofit Assessor (RFA). It is mandatory for all accredited RFAs to provide a minimum of 10 hours of CPD evidence for this strand every 12 months even if it is not your primary strand of assessment. As a result, an individual accredited as a DEA and RFA will be required to provide a minimum of 20 hours of CPD evidence every 12 months.**

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## **3) What counts as CPD?**

It is not possible to provide a full list of what counts as CPD, however please find guidance below on what may be used as CPD. If in any doubt, then please seek prior approval with Qidos:

- *Informal learning, reading or private study* – For this we can accept a **maximum of 6 hours** every 12 months. We suggest you use a CPD log to track and record all informal learning for example, article read, what you learnt and how long it took.
- *Online Modules* – Accreditation schemes and recognised bodies provide modules/courses approved to contain valuable knowledge in relation to the guidelines set out by the MHCLG and TrustMark. These can be found on our website in the Training section (<https://quidos.co.uk/our-courses>) where a description of each module is provided
- *Approved CPD courses, or training days* – Courses or seminars which have been undertaken relevant to the strand of accreditation, is also suitable CPD
- *Relevant seminar days, conferences or Exhibitions for EAs and RFAs*
- *Energy Assessment course, e.g. NDEA for DEA, Retrofit Coordinator for RFAs*
- *Learning from other Industry Professionals* – E.g. Shadowing a surveyor. This is classed as informal learning so can only count for a **maximum of 6 hours**.



Qidos offers a wide range of online CPD modules which are available to purchase from our website [HERE](#). We do however readily accept CPD from other sources, as long as it fulfils our evidence requirements.

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#### 4) What does not count as CPD?

As a quality focused accreditation scheme, we ask that all CPD evidence provided is ***directly relevant to your role as an energy assessor***. An brief summary of the types of learning that cannot be accepted as annual CPD are listed below:

- Informal meetings with professionals
- Energy Assessor online forums
- Electrical, plumbing or heating engineer qualifications
- Course topics unrelated to energy assessment, PAS2035 or professional skills
- Driving qualifications
- Any learning where no supporting evidence can be provided

Please note that this list is not exhaustive so if you would like to check that your CPD evidence can be counted as part of your annual CPD please contact the Qidos accreditation team for guidance.

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#### 5) Formal Learning

A minimum of 4 hours of formal learning must be provided every 12 months, please note that if you are accredited for multiple strands this total will increase.

Formal learning is any learning where a third-party can verify your attendance/completion of the event, an example of this would be any training course where your attendance has been recorded. Any event where a certificate has been awarded or the training provider can provide written confirmation of your attendance can be counted as formal learning as long as the following points are specified:

- The name/title of the course/event
- The date(s) of the course



- The duration (in hours) of the event

Written confirmation from the training provider can be in the format of an email if this is easiest, however the details of the individual confirming your completion of the event needs to be clear (i.e. an email signature provided on the email).

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## 6) Informal Learning

Some of your CPD can be gained for free by completing informal self-led learning, research or home study.

***A maximum of 6 hours of informal CPD every 12 months can be obtained from informal learning. This total is per individual, not per strand so even if you are required to provide CPD for multiple strands, this total remains the same.***

We suggest you use a CPD log to track and record all informal learning for example, article read, what you learnt and how long it took for each piece for informal learning. Qidos do supply quarterly newsletters which would count towards informal learning on the link below <https://quidos.co.uk/2024/01/02/quidos-quarterly-newsletter-december-2023-issue-06/>

There is also added guidance on the Qidos community that all members have access to. For the Qidos community please follow the link below

<https://quidoscommunity.co.uk/signin>

Please see the section 10 of this document below for details of what can be accepted as supporting evidence for informal learning.

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## 7) How to upload CPD

Every Energy Assessor (EA) and Retrofit Assessor (RFA) accredited with Qidos will be required to upload their completed CPD Records, and full supporting evidence, to our Training Portal. To access the portal, [CLICK HERE](#).

The username will be the same as the Energy Assessor's username for iQ-Energy. If the assessor has more than one Qidos ID number, we will only set up one account on the Training Portal so in this situation please contact the accreditation team and they will be able to advise you which of your ID numbers has been used. Your password may be different from your iQ-Energy.

We have created a user guide that shows you how to upload your CPD evidence onto the Training Portal so if you would like a copy of this please ask the accreditation team and they will send it to you.

**\*CPD evidence will not be accepted via email \***

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## 8) CPD: Change of Requirements

Where there is a change in software, scheme requirements or new releases of CLG or TrustMark documentation that affects Energy Assessors, EPCs or RFAs, assessors will need to ensure that they keep up to date with the latest changes.

Quidos will advise members about any of the above changes to ensure they are up to date.

All assessors must record this as part of their annual CPD and it can form part of your 10 hour CPD requirement. This will largely be informal learning so please ensure you evidence it as per the guidance in section 10 of this document.

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## 9) CPD: Disciplinary Requirements

There may be times where assessors are required to undertake additional training this would be following disciplinary action such as the failure of a QA audit. Assessors must ensure that they have completed suitable training or have demonstrated competence and compliance. The additional training needed will often be told to the assessor by a member of the Quidos team. If you are unsure if you need this please do contact a member of the QA or QAS team who will be able to clarify.

All assessors must record this as part of their annual CPD, however it does **not** form part of your 10 hour CPD requirement.

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## 10) How do I plan and record my CPD?

It is recommended that all assessors plan their future learning and CPD by assessing their own knowledge and skills, and identifying any areas for improvement. Suitable opportunities to improve these areas can then be identified.

We require documentation to support any CPD log submitted to show the Quidos team that the assessor has attended/completed the CPD listed. **Details must include the time spent on each form of CPD, the date completed and the topics covered.** Supporting documentation can be in the form of the following:

- Notes taken from informal learning and reading: these can be handwritten and scanned or typed. All reading/learning notes must include the following:
  - Name of the publication
  - Source of the publication
  - Date(s) read
  - How long read for
  - Brief bullet points outlining the learning outcomes
- Confirmation of attendance/completion for Online CPD Modules, Courses, Seminars, exhibitions or training days. This can be in the form of a certificate or written confirmation from the training provider (email/letter)



- Letters of CPD achievements from other professionals confirming the assessor had completed relevant training and gained valuable knowledge associated with Energy assessment and PAS2035.

Once accredited, all assessors are required to upload their annual CPD log and evidence onto the Training portal ([qfe2.quidos.co.uk](http://qfe2.quidos.co.uk)), To access the portal, [CLICK HERE](#). The 12 month period for CPD is based on their Accreditation Anniversary so if an assessor became accredited with Qidos in January, then their CPD year will run from 1st January-31st December.

The Qidos accreditation team is on hand to answer any questions you may have and to provide guidance regarding CPD. You can contact them in either of the following ways:

Telephone = 01225 667 570 (Option 1)

Email = [QAS@quidos.co.uk](mailto:QAS@quidos.co.uk)