



**Title:** Data Sharing Terms and Conditions for Energy Assessors  
**Issue:** v.1.0  
**Issued By:** Sarah Rigby                      **Date:** 12/09/2024  
**Approved By:** Billy Say                      **Date:** 17/09/2024

<b>Revision History</b>				
<b>Issue</b>	<b>Issued</b>	<b>Approved</b>	<b>Reviewed</b>	<b>Description of change(s) made</b>
1.0	12/09/2024	17/09/2024		Policy created in line with changes to SORs

# Data Sharing Terms and Conditions for Energy Assessors

**Effective Date: 24th June 2024**

In accordance with the Energy Performance of Buildings Regulations 2012, energy assessors in England and Wales are permitted to share Energy Performance Certificate (EPC) data with authorised individuals. Please review the following terms and conditions carefully:

For further details, see the full amendment to the Regulations here: [Link to Regulations](#).

## Terms and Conditions

### 1. Data Sharing Permission:

Energy assessors may share EPC data the building owner, occupier, or landlord (referred to as the "authorised person"). Data may also be shared with a third party, provided that the authorised person gives explicit consent.

#### a) "Authorised Person" Proof

Energy Assessors must have valid evidence that the authorised person is the owner, occupier, or landlord of the property. This information must be securely stored and available for audit if requested by Quidos Ltd.

#### b) Voluntary Data Sharing

Energy assessors are not obligated to share data. However, Quidos Ltd provides a structured mechanism to facilitate this process as set out in these terms and conditions.

### 2. Data That Can Be Shared:

Assessment data can be shared. Assessment data includes but is not limited to any data collected during the energy assessment, such as energy calculation data, site notes, floor plans, and photographs.

#### a) Prohibited Data:

Assessment data must not include:

- Green Deal information.
- Names of individuals.
- Information related to excluded buildings (e.g., Ministry of Defence buildings).

**3. Types of Assessments Covered:**

The regulation applies to all EPCs, Air-Conditioning Inspection Reports and Display Energy Certificates (DECs), in England and Wales. This agreement does not cover Scotland and Northern Ireland.

**4. GDPR Compliance:**

Once the data is shared, the recipient becomes the data controller and must comply with UK GDPR and other relevant data protection legislation.

**a) Redaction of Personal Information:**

To comply with GDPR, ensure that all names (including those of the Energy Assessor, landlords, occupiers, owners and any other person.) are removed from shared data. This includes redacting names from documents (such as guarantees, fuel bills etc.) and photographs.

**5. Procedure Before Data Release:**

Quidos Ltd and all accreditation schemes adhere to the *Scheme Operating Requirements (SORs)*. Before releasing any data, energy assessors must complete the "*Sharing Energy Data Notification Form*."

**a) Mandatory Notification**

Assessors must inform Quidos Ltd when sharing data to ensure compliance. By following the correct guidance, completing the "*Sharing Energy Data Notification Form*" and agreeing to these terms and conditions, assessors will remain compliant.

**6. Charging for Data Sharing:**

Assessors may charge for data sharing services.

**7. Consequences of Non-Compliance:**

Sharing data without following the correct procedure is a violation of the law. Quidos Ltd is committed to helping members remain compliant, so adherence to the process is crucial.

If you require any further guidance with data sharing please contact the Accreditation team on [gas@quidos.co.uk](mailto:gas@quidos.co.uk) and they will be happy to assist. The *Sharing Energy Data Notification Form* can be found on the Technical Support Log: [support.quidos.co.uk](http://support.quidos.co.uk)