

Client Letter of Engagement Example

(On BER Assessor's Headed Notepaper)

Insert client name

Insert client address

Insert date

Dear Insert client name,

Thank you for appointing insert BER assessor name/company to carry out a Building Energy Rating (BER) assessment of insert name/address of the building. Please see below the following terms and conditions:

1. The BER assessment will be carried out in accordance with the BER Assessors Code of Practice and the relevant BER methodologies and guidance from the Sustainable Energy Authority of Ireland (SEAI). In particular, it will be carried out in an independent manner by insert BER assessor name/company.
2. New provisional BER assessments will be based on drawings, specifications, and other data supplied by you.
3. New final and existing BER assessments will be based on a survey of the building and other data supplied by you. Plans and specifications related to the building being assessed may also assist the BER assessment and should be provided if available.
4. You must share details of any retrofit and upgrade work carried out on an existing building that you think will have an impact on the BER. Further documentation may be required from you to account for such works in your BER assessment. If sufficient documentary evidence cannot be provided, more conservative default values will be selected. This may impact the energy rating of your home.
5. [Please review the homeowner checklist](#) outlined below and provide any relevant information to support your BER. It is recommended to gather this supporting documentary evidence before the survey to ensure a more accurate and efficient BER assessment. The BER will be calculated based on the information provided and gathered during the BER assessment and will be submitted to SEAI for publication.
6. All data provided to support the published BER must meet the requirements of the BER methodology.
7. Under SI 243/2012, the BER data file may be made available to (i) the BER assessor that carried out the relevant BER assessment (or their employer), (ii) a BER assessor undertaking any subsequent BER assessment of the relevant building (or their employer) or (iii) the relevant building owner (or an agent acting on behalf of the owner) via a BER assessor. The 'BER data file' is an electronic file that contains a report on the outcome of a BER assessment of a particular building, which is completed by a BER assessor and provided to SEAI to notify it of the record to be made or updated on the BER register in respect of that particular building and includes any calculations and related data or documents accompanying that report.

8. Copies of all information and documentation that you supply to me in connection with this application (whether requested by me/us or otherwise) will become the property of SEAI.
9. **We/I** will maintain confidentially and appropriate security measures in dealing with personal data. BER assessors are not permitted to make any disclosures to other parties with the limited exceptions to these requirements being the disclosure of information required by law and disclosure to SEAI or its authorised officers.
10. Any personal data collected as a part of the BER assessment or provided to SEAI will be processed in accordance with the provisions of applicable data protection law in force in Ireland (including Regulation (EU) 2016/679 of the European Parliament and of the Council of 27 April 2016 and the Data Protection Act 2018 as may be amended from time to time). You can find my/our privacy notice here **<insert BER assessor/employer privacy notice>**. For information on how SEAI processes your personal data please visit the SEAI website <https://www.seai.ie/publications/BER-Privacy-Notice.pdf>.
11. **Insert BER assessor name/company** and SEAI shall have no responsibility for any loss or damage that may arise from the Building Energy Rating assessment.
12. The methodology used for the BER assessment incorporates standard occupancy assumptions and a range of technical judgments on the energy efficiency of various building components and attributes. A BER may change over time due to many factors including deterioration or modification to the building, or an update to the BER calculation methodologies or the documentation available to support inputs at the time of the assessment. As a result, an energy rating is only a guide to the overall energy efficiency of a building. In practice, energy efficiency is highly dependent on how occupants use the building.
13. Registered BER Assessors have an ongoing responsibility to ensure the accuracy and independence of the BER certificates they issue. For that purpose, in some instances, your BER may be selected by SEAI for an audit and an auditor may be required to visit the site for an inspection. You or the owner or subsequent owner of the building may be requested to facilitate the audit. If you decide not to facilitate such a request, SEAI may decide to revoke the relevant BER Certificate.
14. The fee for the BER Assessment will be €**<insert amount>** including VAT. This fee is inclusive of all costs including payment to SEAI for publication of the BER assessment.

Please confirm your agreement with this Letter of Engagement by signing the acceptance form below and returning it before the BER assessment.

I **Insert BER assessor name/company am/are** happy to accept this assignment based on the above terms and conditions.

Yours sincerely,

BER Assessor signature
BER Assessor name

Client Acceptance of Letter of Engagement

I/We, insert client (s) name, agree to appoint insert **BER assessor name/company** to carry out a BER assessment of insert name/address of the building.

I/We acknowledge that I/we have been requested by the BER Assessor to provide documentation (if available) on any energy-related works that were carried out on the dwelling that may affect the BER assessment.

I/We wish to provide the following information to support the BER assessment (leave blank if unknown):

Construction year of original dwelling: _____

Construction year of any/each extension: _____

- **I/We** accept that any supporting information **I/we** provided the BER Assessor is accurate and confirm that **I/we** acknowledge and accept the above terms and conditions outlined in this Letter of Engagement.
- **I/We** confirm that **I/we** have read the enclosed checklist and understand what is required of me/us to undertake this BER assessment.
- **I/We** further acknowledge that should SEAI from time to time require access to personal data **I/we** will provide information to **insert BER assessor name/company** to share with SEAI, and /or provide access to the building in connection with the BER assessment. **I/we** hereby understand that such access being provided to SEAI (and to its employees, contractors, servants, agents, and representatives) is necessary for the purpose of administration of the national BER register; consideration and/or processing of **my/our** BER certificate; and/or discharge by SEAI of its statutory and regulatory functions relative to the BER register.

Signed _____

Date _____

Homeowner Checklist

1	Step 1 – Engaging your assessor <i>Use this checklist to engage your chosen BER assessment</i>	✓.
1.1	Quote received and agreed and Letter of Engagement in place with BER assessor.	
1.2	Confirm your postal address and Eircode. <i>These will appear on your BER certificate.</i>	
1.3	Confirm your MPRN. <i>You will find your Meter Point Reference Number (MPRN) on a household electricity bill.</i>	
1.4	Discuss checklist (below) in advance with your BER assessor <i>BER assessor can address any queries you may have on the documentation.</i>	
1.5	Ensure all home improvements are complete before scheduling your survey. <i>Request all documentation of completed works from your contractor.</i>	
1.6	Let your assessor know if you wish to discuss the BER result before publication.	

Step 2 – Prepare the relevant paperwork for your BER assessment

Before your BER Assessor visits your home, you will need to prepare for your BER assessment. This includes gathering documentary evidence for works done on your home, to ensure you are receiving the most accurate BER rating.

Having all your documents and paperwork prepared prior to your BER assessment will significantly reduce the time it takes to receive your BER Certificate and Advisory Report.

In the absence of relevant documents, your BER assessor will be required to use default values, which are conservative estimates of the performance of certain aspects of your home. This may result in your home receiving a lower BER rating. Using this checklist will help minimise the use of default values to calculate your BER.

2	Step 2 – Prepare the relevant paperwork for your BER assessment <i>Use this checklist to ensure you have all the required documents (if applicable to you) which will ensure a more accurate BER assessment rating.</i>	✓.
2.1	Age of Construction <i>Proof of the year the house was built and proof of the age of any extensions added to the house (if applicable) for example:</i> <ul style="list-style-type: none"> • Legal documents such as planning notice/commencement notice or • OSI maps for maps from 2005, 2000, 1995 or • Homeowner confirmation in writing 	
2.2	Plans or specifications of the house (if available)	
2.3	Details of any insulation upgrade works installed (if applicable) <ul style="list-style-type: none"> • As-built drawings/specifications (signed off by the architect, engineer or assigned certifier stating the type & thickness of insulation installed or 	

	<ul style="list-style-type: none"> Copies of invoices with detailed description of materials (e.g. insulation type, thickness and quantity) or Report of works signed off by a contractor showing the area of surface insulated, insulation thickness and type or <p>Photographs showing insulation type and thickness</p>	
2.4	<p>Details of any window upgrade works (if applicable)</p> <ul style="list-style-type: none"> Photographs (e.g., showing frame/glazing), Confirmation of window type/glazing specification installed through As-Built Drawings/ Specifications or Invoices Certification of the U-value and solar transmittance in the form of the Declaration of Performance or other appropriate accredited certification such as NSAI WEP (Window Energy Performance) scheme or BFRC. 	
2.5	<p>Details of any door upgrade works (if applicable)</p> <ul style="list-style-type: none"> Documentary evidence of door type installed, and Certification of the U-value in the form of the Declaration of Performance or other appropriate accredited certification. 	
2.6	<p>Results of any air tightness tests completed (if applicable)</p> <p>Ensure that the test was carried out by a registered air tightness tester, an individual or organisation competent to do so (NSAI or INAB accreditation for example).</p>	
2.7	<p>Information on the heat pump installed (if applicable)</p> <ul style="list-style-type: none"> Information used to support non-default efficiency (e.g. Ecodesign data, EN 16147 data and designer/installer sign-off sheet for heat pumps, accredited test certificates, etc.); Where Ecodesign documentation is used, an additional declaration from the manufacturer is needed for the use of parameters not required to be included in Ecodesign Product Information. For non-default flow temperatures for heat pumps, heating design sheets & radiator technical data sheets 	

Step 3 – Prepare your home for your BER assessment

What should I expect when a BER Assessor calls to my home?

Your BER is calculated based on the amount of energy your home requires for space heating, hot water heating, ventilation, the building fabric, and lighting. To complete this calculation, your BER Assessor will need to collect information on various aspects of your home.

To collect this information, your BER Assessor will need access to all areas of your home including the attic, lighting systems, ventilation, meter cupboards, heating systems and controls, hot press and all doors and windows.

During the BER assessment, your BER Assessor will collect information which will include several calculations, measurements, and photographic evidence of each of these aspects of your home.

3	<p>Step 3 – Prepare your home for your BER assessment</p> <p>Use this checklist to ensure your assessor can obtain all the information needed while in your home</p>	✓.
3.1	<p>Ensure all areas in your house are unlocked and accessible including attic and garage.</p>	

3.2	Ensure any outdoor buildings containing heating appliances are unlocked and accessible.	
3.3	Identify the areas in your home that have been extended or upgraded	
3.4	Identify the heating system and heating controls	
3.5	Ask your assessor if the documentation you have provided is sufficient to fully take account of all of your upgrades. <i>It may be the case that the documentation did not meet the requirements. This may provide you with an opportunity to source further documentation.</i>	

4	Step 4 – Post BER Use this checklist to ensure your following the completion of your BER	✓.
4.1	Retain a copy of all documentation supporting the inputs in your BER <i>This is a record of all upgrades in your home and is important documentation. You may need this evidence for future BERs.</i>	
4.2	Check your published BER <i>You can check your published BER and download a copy of your BER certificate and advisory report here.</i>	
4.3	Contact your BER assessor if you have any questions regarding your published BER or advisory report	