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Rod Hanchard-Goodwin	26/06/2015	1.3

# Green Deal Plan Tool

## Scottish User Guide

# 1. Introduction

This document is a guide to using the Green Deal Plan Tool which is accessible on the Scottish Energy Performance Certificate (EPC) Register.

This enables users to create the disclosure information to add to the Energy Performance Certificate for buildings in Scotland.

## 2. Audience

Green Deal Provider staff who will need to create the disclosure information to confirm a Green Deal Plan.

## 3. Overview of the Green Deal Plan Tool

Underpinning the Green Deal is the principle that a Green Deal will transfer to subsequent bill payers, when they become the bill payer after buying or renting a building with a live Green Deal Plan attached to the energy meter.

For this to happen the key terms of the Green Deal Plan must be disclosed to subsequent bill payers i.e. a prospective owner or tenant needs to be informed that there is a Green Deal on the property.

To achieve this, the Green Deal legislative framework uses the existing infrastructure that registers and stores EPCs.

Green Deal information is added to the EPC and this is then used to disclose the Green Deal when the property is transferred between bill payers.

In this way, the Green Deal uses an existing regulatory requirement, because sellers and landlords are already required to make EPCs available to prospective buyers or tenants.

The Green Deal Plan Tool is used by Green Deal Providers (GDPs) to record details of:

- the measures installed in a property and when these are paid off over the term of the Plan
- the estimated energy bill savings these measures will generate
- the daily charge added to the electricity bill
- the interest rate and whether this is fixed or variable
- the Plan start and end date
- any charge uplift and the dates this applies
- whether or not the Green Deal Plan is regulated by the Consumer Credit Act 1974 (CCA)
- the Green Deal Provider and their contact details.

This information is stored on the EPC register and incorporated into the EPC (on the 'disclosure page'), so that when an EPC is retrieved, the disclosure page is included in the pdf EPC document generated by the EPC Register.

The Green Deal Plan Tool is then used by Providers on an ongoing basis to make changes to this information as this may change over the life of a Green Deal Plan.

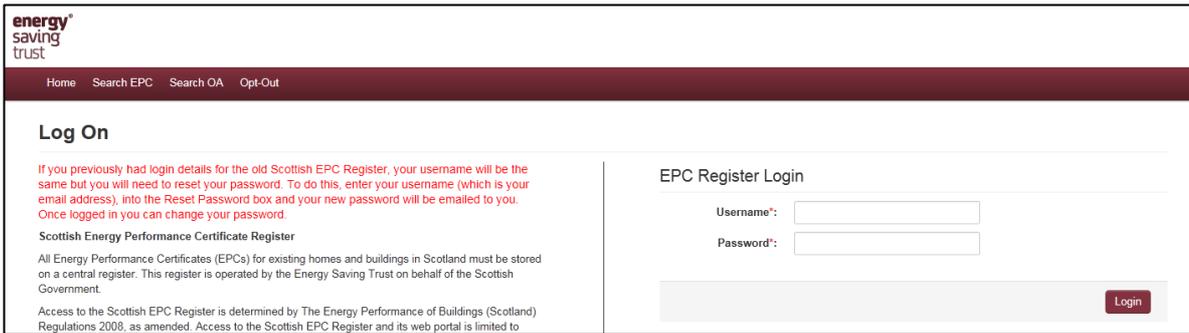
# 4. Instructions for use of the Green Deal Plan Tool

## 4.1 Registering to access the Tool

The tool is contained within the Scottish EPC Register, and accessed via the web portal for both Domestic and Non-Domestic register from the following link:

- <https://www.scottishepcregister.org.uk/>

Figure 1 – Plan Tool Log-in



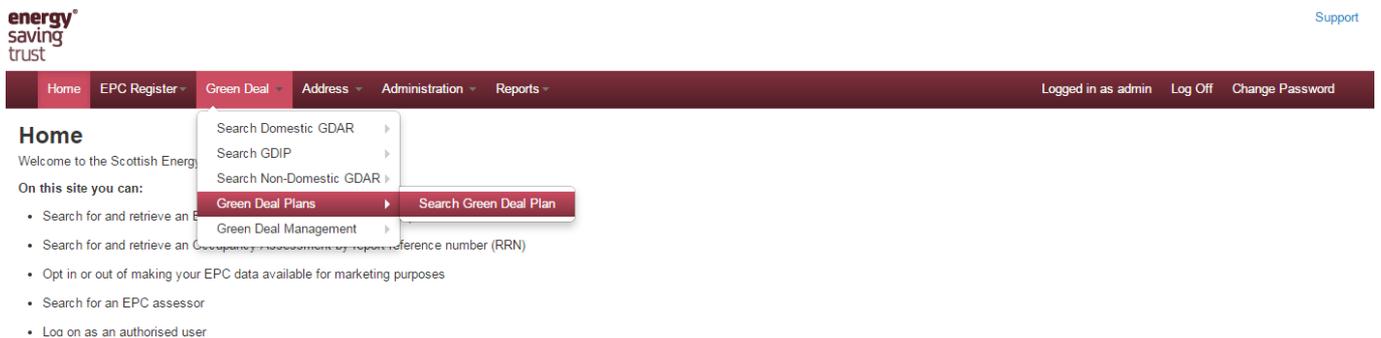
Each authorised Green Deal Provider (GDP) can contact the Energy Savings Trust and be set up with a Green Deal Admin account. This Admin account allows each GDP to add individual users to the user group for their GDP.

The GDP administrator needs to e-mail to [scottishepcregister@est.org.uk](mailto:scottishepcregister@est.org.uk) with the following details:  
E-mail, Name, Telephone Number, Organisation name and address.

## 4.2 Searching for Green Deal Plans

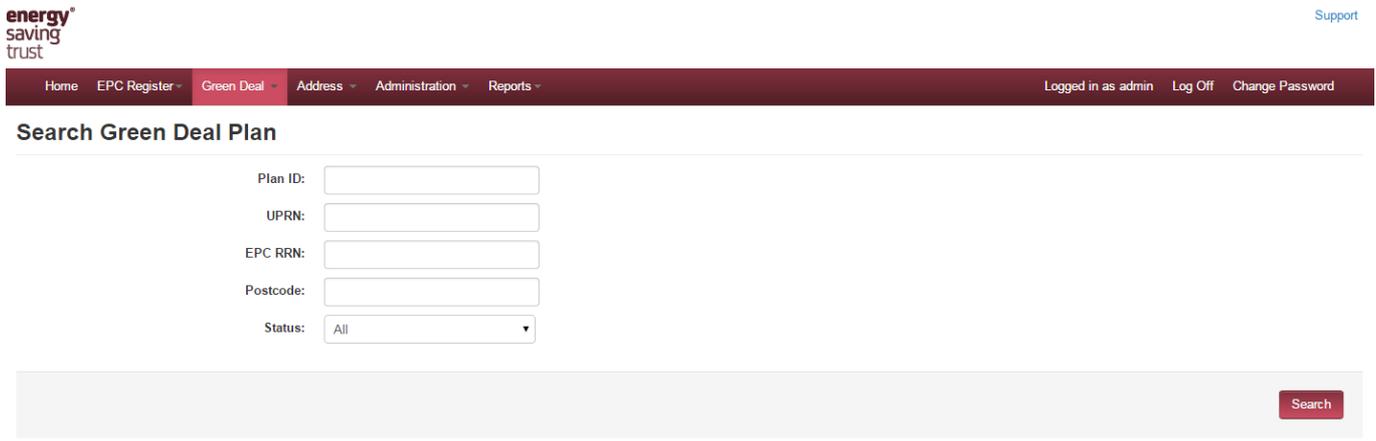
To search for Green Deal Plans the user must access the “Search Green Deal Plan” tab within the tool as shown in Figure 2.

Figure 2 – Search Green Deal Plan



To search for a plan select **Green Deal Plans** from the menu bar at the top, and then click on **Search Green Deal Plan**. This will bring up the Search Screen – see Figure 3 overleaf.

Figure 3 – Search Screen



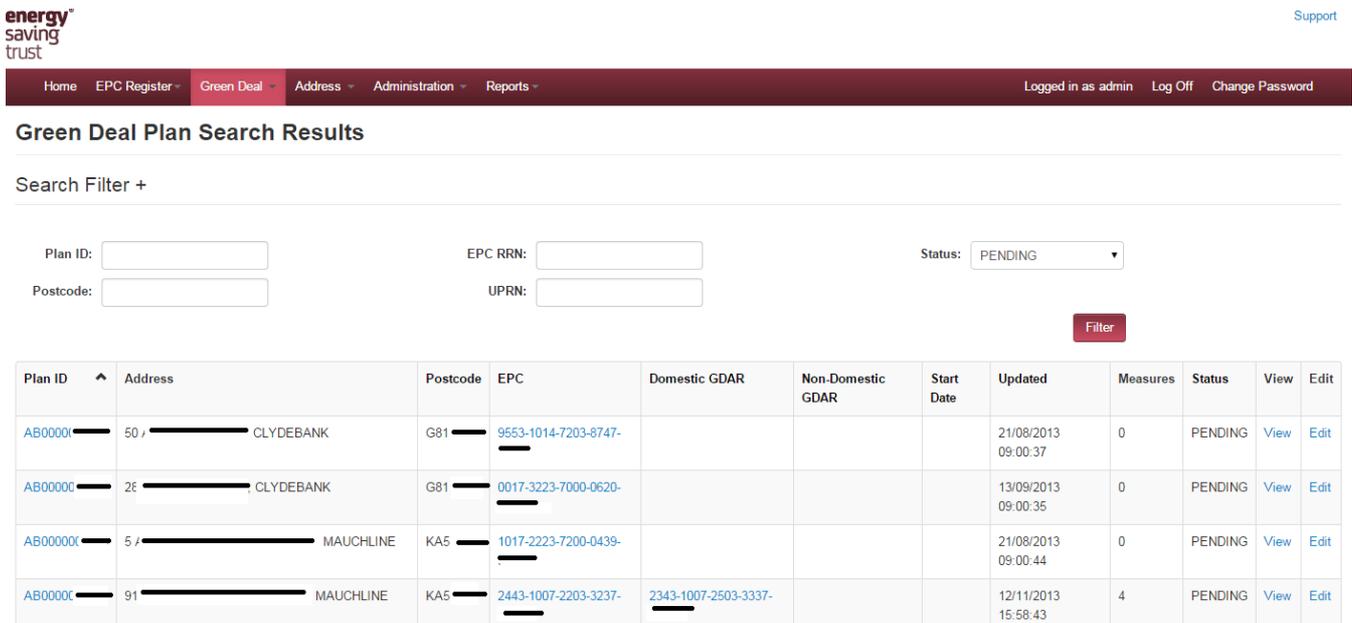
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To bring up a Green Deal Plan, enter the Green Deal Plan ID (which Providers will have received from the Green Deal Central Charge database upon setting up the Plan) and then click on **Search**.

If the Plan ID is not available, the user also has options to search for Plans by property “UPRN”, EPC RRN, or the post code. It is also possible to search by Plan Status (new, pending, live, cancelled, and completed). This will then bring up the Green Deal Plan Search Results screen See Figure 4. This will show the basic information for the plan: Address, EPC RRN, Occupancy Assessment RRN, etc. If you have searched by EPC RRN, Postcode, UPRN or Plan Status, this screen will show all Green Deal Plans that matched your Search. It is possible to sort the results by selecting **View All** at the bottom of the screen if there are more than ten results and then selecting sort on any of the following headings: Plan ID, Postcode, EPC, Domestic GDAR (Figure 4), Non-Domestic GDAR, Start Date, Updated and Status. Once the results have been sorted by a particular column it will show an arrow at the top. The GD Plans are sorted by Plan ID as shown in the following screenshot.

Figure 4 – Search Results Screen



It is possible to click any EPC or GDAR and to be able to download the associated document (assuming the user has permission to view the document).

If the Plan ID is known then the following results screen (Figure 5) will be shown.

Figure 5 – Search known plan results screen

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Support

Logged in as admin Log Off Change Password

Home EPC Search OA Search GDAR Green Deal Plans Assessor Management User Management Missing Address Address Search Green Deal Management Reports

### Green Deal Plan Search Results

Search Filter +

Plan ID: JR980912  
 Postcode:   
 EPC RRN:   
 UPRN:   
 Status: All

Filter

Plan ID	Address	Postcode	EPC	OA	GDAR	Start Date	Updated	Measures	Status	View	Edit
JR980912	102 , IRVINE	KA12	0678-4554-5510-6239				17/12/2012 09:30:47	0	PENDING	<a href="#">View</a>	<a href="#">Edit</a>

First Prev Next Last Show 10 per page

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By clicking ‘View’ this will then bring up the Plan information. Note that some of the fields will have already been populated by the Green Deal Central Charge (GDCC) database operated by MRASCo. See Figure 6.

Figure 6 – View Green Deal Plan Details

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Support

Home EPC Register Green Deal Address Administration Reports Logged in as admin Log Off Change Password

### Green Deal Plan - AB0000

Address

Address: 50  
 CLYDEBANK

Register Documents

Pre-Installed EPC: 6653-1014-7203  
 Post-Installed EPC:  
 Domestic GDAR:  
 GDIP:

Plan Details

Contact Details: Home Energy and Lifestyle Management Limited

Structure Changed Since Agreement: No  
 Adheres to Consumer Credit Act: No  
 Repayment Start Date:  
 Repayment End Date: 02/07/2030  
 Repayment Interest Rate: 0.00%  
 Fixed Interest Rate: No  
 APR: 0.00%  
 GD Plan Uplift:  
 Total Daily Electricity Saving (E):  
 Total Daily Gas Saving (E):  
 Total Daily Other Fuel Saving (E):

Measures

Measure	Product Name	Repayment Date	ECO

Return to List Preview PDF

### 4.3 Updating a Green Deal Plan for the first time

The first time the Green Deal Plan Tool will be used is for Plans in ‘Pending’ state, **after** measures have been installed but **before** the post-installation Energy Performance Certificate is generated. As a Green Deal

Provider the first time that a GD Plan needs to be updated is when it is at PENDING status. Please see below for the steps required to update the plan before it can be made LIVE.

Search using the GD Plan Tool search as shown in Figure 3. The results will be shown as below in Figure 7:

Figure 7– Search results

The screenshot shows the 'Green Deal Plan Search Results' page. At the top, there is a navigation bar with 'Home', 'EPC', 'Search OA', 'Search GDAR', 'Green Deal Plans', 'Assessor Management', 'User Management', 'Missing Address', 'Address Search', 'Green Deal Management', and 'Reports'. The 'Green Deal Plans' menu is highlighted. Below the navigation bar, the page title is 'Green Deal Plan Search Results'. There is a 'Search Filter +' section with input fields for 'Plan ID' (containing 'JR980912'), 'EPC RRN', 'Postcode', and 'UPRN'. A 'Status' dropdown menu is set to 'All'. A 'Filter' button is located below the search filters. Below the filter section is a table with the following columns: Plan ID, Address, Postcode, EPC, OA, GDAR, Start Date, Updated, Measures, Status, View, and Edit. The table contains one row with the following data: Plan ID: JR980912, Address: 102, Irvine, Postcode: KA12, EPC: 0678-4554-5510-6239, OA: , GDAR: , Start Date: , Updated: 17/12/2012 09:30:47, Measures: 0, Status: PENDING, View: View, Edit: Edit. Below the table are navigation buttons: 'First', 'Prev', 'Next', 'Last'. There is also a 'Show 10 per page' dropdown. At the bottom, there is a copyright notice: '© Copyright Energy Saving Trust - All rights reserved' and 'Powered by Bridgeall Version 6.0.6.0a'.

To update the plan select the Edit button and the screen in Figure 8 will be shown.

Figure 8– Edit Green Deal Plan details

The screenshot shows the 'Green Deal Plan - AB0000' edit details page. The page is divided into two main sections: 'Address' and 'Plan Details'. The 'Address' section includes fields for 'Address' (50 Clydebank) and 'Register Documents' (Pre-Install EPC, Post-Install EPC, Domestic GDAR, GDIP). The 'Plan Details' section includes 'Contact Details' (Home Energy and Lifestyle Management Limited), 'Structure Changed Since Agreement', 'Adheres To Consumer Credit Act', 'Repayment Start Date', 'Repayment End Date', 'Repayment Interest Rate' (0.00), 'Fixed Interest Rate', 'APR' (0.00), 'GD Plan Uplift', and 'Total Daily Electricity Savings (€)', 'Total Daily Gas Savings (€)', and 'Total Daily Other Fuel Savings (€)'. At the bottom, there are 'Save', 'Cancel', and 'Preview PDF' buttons. A note at the bottom right states: 'Plan details will appear on page 5 of all EPCs for this property'.

The Plan Tool extracts the savings data from the GDAR or a GDIP and adds it to the disclosure page. In the "Register Documents" section (see Figure 8 above), enter the reference number of the GDAR into the box labeled " Domestic GDAR" and/or enter a GDIP reference number into the box labeled "GDIP" if a GDIP assessment is be associated with the plan\*

*\*Please note that both fields (GDAR and GDIP) will need to be populated if a GDIP is being used.*

**Please be aware, the GDAR and/or GDIP reference numbers that are entered must belong to a GDAR or GDIP that is based on the specific EPC RRN that the Plan has been created against.**

Following this the next step is to enter the Green Deal Plan Details. See the right hand column of Figure 7 on previous page.

The Plan Details box asks the Provider to confirm:

- Contact details
- Structure Changed since Agreement *(tick box for Yes)- Whilst this shows mandatory it only needs to be selected if the property has had structural changes since the EPC have been done but are not considered to require a new EPC*
- CCA regulated, or not *(tick box for Yes) - Whilst this shows mandatory it only needs to be selected if the plan is CCA regulated*
- Repayment Interest rate – *This value does not appear on the plan or disclosure page (EST are aware of this issue and will remove this field in a future release)*
- Fixed Interest Rate, or not *(tick box for Yes) Whilst this shows mandatory it only needs to be selected if the plan has a fixed interest rate*
- APR
- GD Plan Uplift

Figure 10– Save the Plan Details

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Home EPC Register Green Deal Address Administration Reports Logged in as admin Log Off Change Password

### Confirm Changes

Are you sure you wish to commit the following changes to this Green Deal Plan?

Plan Details

Plan ID: AB0000

Structure Changed Since Agreement

Adheres To Consumer Credit Act

Repayment Interest Rate: 6.00

Fixed Interest Rate:

APR: 7.00

GD Plan Uplift:

Register Documents

Domestic GDAR: 2943-1007-2903

GDIP: 1000000000

Green Deal Advice Report:

Once this is saved the screen will show that the plan has been saved as shown in Figure 11.

Figure 11– Save confirmed

The screenshot shows the 'Green Deal Plan - AB0000' interface. At the top, there is a navigation bar with 'Home', 'EPC Register', 'Green Deal', 'Address', 'Administration', and 'Reports'. A 'Support' link is in the top right. Below the navigation bar, a green banner displays 'Green Deal Plan Saved'. The main content is divided into two columns: 'Address' and 'Plan Details'.  
The 'Address' section includes:  
- Address: 91 [redacted]  
- MAUCLINE [redacted]  
The 'Register Documents' section includes:  
- Pre-Install EPC: 2443-1007-2203- [redacted]  
- Post-Install EPC: [redacted]  
- Domestic GDAR: 2343-1007-2503- [redacted]  
- GDIP: 1000000000 [redacted]  
The 'Plan Details' section includes:  
- Contact Details: Home Energy and Lifestyle Management Limited  
- Structure Changed Since Agreement:   
- Adheres To Consumer Credit Act:   
- Repayment Start Date: [redacted]  
- Repayment End Date: [redacted]  
- Repayment Interest Rate: 6.96  
- Fixed Interest Rate:   
- APR: 7.66  
- GD Plan Uplift: [redacted]  
- Total Daily Electricity Savings (£): 2.75  
- Total Daily Gas Savings (£): 0.00  
- Total Daily Other Fuel Savings (£): 0.00

Once the GDAR has been associated to the Green Deal Plan the Plan Tool will also pull through the standardised measure-type descriptions from the Green Deal Advice Report or Green Deal Improvement Package, for each of the measures installed. The Green Deal Measures box asks the Provider to add further details about the measures installed:

- Product name – free text box that allows the user to put in details for the product installed
- Repayment Date – this is the Date the measure is paid-off under the Plan, and should be manually entered/updated each time the plan is updated as the Plan end date is automatically pulled through into each measure as a default.
- Whether, or not, any of the measures are Part Financed by ECO

The regulations require Providers to add a description that is sufficient to identify the improvement measures installed under a Green Deal.

The standard measure type description pulled through from the Green Deal Advice Report or Green Deal Improvement Package identifies what the measure is.

But the provider should include any further information, like the manufacturer and product or serial number of the measure or product installed, like a boiler, for example.

This will be useful to any prospective buyer or tenant, or to anyone employed by them, like an estate agent or a surveyor, to identify the measure and confirm it's still there when the property changes hands.

Depending on the number of installed measures, adding too much information here could lead to the disclosure information being presented on two pages instead of one.

So Providers should satisfy themselves that they are content with the information they have entered.

Figure 12 - Update measures

<b>Plan Measure</b>
Measure Type: B: Cavity wall insulation
Product Name: Cavity wall insulation
Repayment Date: 12/04/2034
Part-Financed by ECO*: <input type="checkbox"/>
<b>Plan Measure</b>
Measure Type: Q1: External wall insulation (100mm) to 100% of system built wall
Product Name: External wall insulation
Repayment Date: 12/04/2034
Part-Financed by ECO*: <input type="checkbox"/>
<b>Plan Measure</b>
Measure Type: X: High performance external doors
Product Name: External doors
Repayment Date: 12/04/2024
Part-Financed by ECO*: <input type="checkbox"/>
<b>Plan Measure</b>
Measure Type: U: Solar photovoltaic panels (2.5 kWp, orientation S)
Product Name: Solar PV
Repayment Date: 12/04/2034
Part-Financed by ECO*: <input type="checkbox"/>
Plan details will appear on page 5 of all EPCs for this property
<input type="button" value="Save"/> <input type="button" value="Cancel"/> <input type="button" value="Preview PDF"/>

Once the measures have been updated with the correct information then the user must select save and then the user will be asked to confirm the changes as shown in Figure 13.

Figure 13 –Confirm Changes


[Support](#)

Home EPC Register Green Deal Address Administration Reports
Logged in as admin Log Off Change Password

### Confirm Changes

Are you sure you wish to commit the following changes to this Green Deal Plan?

---

**Plan Details**

Plan ID: AB0000

Structure Changed Since Agreement:

Adheres To Consumer Credit Act:

Repayment Interest Rate: 0.00

Fixed Interest Rate:

APR: 7.00

GD Plan Uplift:

---

**Register Documents**

Domestic GDAR: 2343-1007-2503

GDIP: 1000000000

Green Deal Advice Report:

<b>Plan Measure</b>
Measure Type: B: Cavity wall insulation
Product Name: Cavity wall insulation
Repayment Date: 12/04/2034
Part-Financed by ECO*: <input type="checkbox"/>
<b>Plan Measure</b>
Measure Type: Q1: External wall insulation (100mm) to 100% of system built wall
Product Name: External wall insulation
Repayment Date: 12/04/2034
Part-Financed by ECO*: <input type="checkbox"/>
<b>Plan Measure</b>
Measure Type: X: High performance external doors
Product Name: External doors
Repayment Date: 12/04/2024
Part-Financed by ECO*: <input type="checkbox"/>
<b>Plan Measure</b>
Measure Type: U: Solar photovoltaic panels (2.5 kWp, orientation S)
Product Name: Solar PV
Repayment Date: 12/04/2034
Part-Financed by ECO*: <input type="checkbox"/>
<input type="button" value="Confirm"/> <input type="button" value="Cancel"/>

Finally click confirm button to save and the header will confirm that the plan has been saved.

Figure 14- Save measures confirmation

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Home EPC Register Green Deal Address Administration Reports Logged in as admin Log Off Change Password Support

### Green Deal Plan - AB0000

Green Deal Plan Saved

Address

Address: 91 MAUCHLINE

Plan Details

Contact Details: Home Energy and Lifestyle Management Limited

Structure Changed Since Agreement:

Adheres To Consumer Credit Act:

Repayment Start Date:

Repayment End Date:

Repayment Interest Rate: 6.99

Fixed Interest Rate:

APR: 7.66

GD Plan Uplift:

Total Daily Electricity Savings (£): 2.75

Total Daily Gas Savings (£): 0.00

Total Daily Other Fuel Savings (£): 0.00

Register Documents

Pre-install EPC: 2443-1007-2203

Post-install EPC:

Domestic GDAR: 2343-1007-2503

GDIP: 1000000000

Measure

Plan Measure

Measure Type: B. Cavity wall insulation

Product Name: Cavity wall insulation

Repayment Date: 12/04/2034

Part-Financed by ECO?:

Plan Measure

Measure Type: Q1. External wall insulation (100mm) to 100% of system built wall

Product Name: External wall insulation

Repayment Date: 12/04/2034

Part-Financed by ECO?:

Plan Measure

Measure Type: X. High performance external doors

Product Name: External doors

Repayment Date: 12/04/2024

Part-Financed by ECO?:

Plan Measure

Measure Type: U. Solar photovoltaic panels (2.5 kWp, orientation S)

Product Name: Solar PV

Repayment Date: 12/04/2034

Part-Financed by ECO?:

Plan details will appear on page 5 of all EPCs for this property

Save Cancel Preview PDF

To find the updated plan search for Green Deal Plan and then enter the plan id and the results will be shown as in Figure 15 overleaf.

Figure 15- Search Plan after update

The screenshot shows the 'Green Deal Plan Search Results' page. At the top, there is a navigation bar with 'Home', 'EPC Register', 'Green Deal', 'Address', 'Administration', and 'Reports'. The user is logged in as 'admin' and can log off or change their password. The main heading is 'Green Deal Plan Search Results'. Below this is a 'Search Filter +' section with input fields for Plan ID (AB0000), EPC RRN, Postcode, and UPRN, and a dropdown for Status (All). A 'Filter' button is present. The search results are displayed in a table with columns: Plan ID, Address, Postcode, EPC, Domestic GDAR, Non-Domestic GDAR, Start Date, Updated, Measures, Status, View, and Edit. One result is shown for Plan ID AB0000 at address 91 MAUCLINE, with EPC 2443-1007-2203-3237 and Domestic GDAR 2343-1007-2503-3337. The status is PENDING. Navigation buttons (First, Prev, Next, Last) and a 'Show 10 per page' dropdown are at the bottom. Copyright and version information are at the very bottom.

Plan ID	Address	Postcode	EPC	Domestic GDAR	Non-Domestic GDAR	Start Date	Updated	Measures	Status	View	Edit
AB0000	91 MAUCLINE	KA5	2443-1007-2203-3237	2343-1007-2503-3337			19/06/2015 14:46:37	4	PENDING	<a href="#">View</a>	<a href="#">Edit</a>

## 4.4 Updating an existing Green Deal Plan

Whilst a plan is in the New or Pending status it can still be updated. This is particularly relevant where the measures may have been altered or the start date changed from what was originally proposed.

To search for a plan to edit go to the Green Deal Plan and select the Search Green Deal tab as shown in Figure 16 below.

Figure 16- Search Green Deal Plan

The screenshot shows the 'Search Green Deal Plan' page. It features a search form with input fields for Plan ID, UPRN, EPC RRN, and Postcode, and a dropdown for Status (All). A 'Search' button is located at the bottom right of the form. The page includes the same navigation bar and footer as Figure 15.

The results then will be displayed as overleaf in Figure 17.

Figure 17- Search Green Deal Plan results

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Home EPC Register Green Deal Address Administration Reports Logged in as admin Log Off Change Password

### Green Deal Plan Search Results

Search Filter +

Plan ID:  EPC RRN:  Status:

Postcode:  UPRN:

Plan ID	Address	Postcode	EPC	Domestic GDAR	Non-Domestic GDAR	Start Date	Updated	Measures	Status	View	Edit
AB000	91 MAUCLINE	KA5	2443-1007-2203-3237	2343-1007-2503-3337			19/06/2015 14:46:37	4	PENDING	<a href="#">View</a>	<a href="#">Edit</a>

First Prev Next Last Show 10 per page

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To edit any items in the plan select the edit button against the plan that needs to be updated. The following items can be edited as shown below in Figure 18:

- Contact details
- Structure Changed since Agreement (tick box for Yes)- Whilst this shows mandatory it only needs to be selected if the property has had structural changes since the EPC have been done but are not considered to require a new EPC
- CCA regulated, or not (tick box for Yes) - Whilst this shows mandatory it only needs to be selected if the plan is CCA regulated
- Repayment Interest rate – This value does not appear on the plan or disclosure page (EST are aware of this issue and will remove this field in a future release)
- Fixed Interest Rate, or not (tick box for Yes) Whilst this shows mandatory it only needs to be selected if the plan has a fixed interest rate
- APR
- GD Plan Uplift

Figure 18- Edit Green Deal Plan

saving trust

Home EPC Register Green Deal Address Administration Reports Logged in as admin Log Off Change Password

### Green Deal Plan - AB0000

Address

Address: 91 MAUCLINE

Register Documents

Pre-Install EPC: 2443-1007-2203-  
Post-Install EPC:  
Domestic GDAR:   
GDIP:

Plan Details

Contact Details: Home Energy and Lifestyle Management Limited

Structure Changed Since Agreement:

Adheres To Consumer Credit Act:

Repayment Start Date:  
Repayment End Date:  
Repayment Interest Rate\*:

Fixed Interest Rate:

APR\*:

GD Plan Uplift:

Total Daily Electricity Savings (£): 2.75  
Total Daily Gas Savings (£): 0.00  
Total Daily Other Fuel Savings (£): 0.00

Measures

Once these have been updated the user must select save and the user will be asked to confirm the changes as shown in Figure 19.

*Figure 19– Confirm Changes*

Once this is saved the screen will show that the plan has been saved as shown in Figure 20.

*Figure 20– Save confirmed*

In addition the Green Deal Measures can be edited to show further details on the product and repayment dates as shown in Figure 21 overleaf.

- Product name – free text box that allows the user to put in details for the product installed
- Repayment Date – this is the Date the measure is paid-off under the Plan, and should be manually entered/updated each time the plan is updated as the Plan end date is automatically pulled through into each measure as a default.
- Whether, or not, any of the measures are Part Financed by ECO

The regulations require Providers to add a description that is sufficient to identify the improvement measures installed under a Green Deal.

The standard measure type description pulled through from the Green Deal Advice Report or Green Deal Improvement Package identifies what the measure is.

But the provider should include any further information, like the manufacturer and product or serial number of the measure or product installed, like a boiler, for example.

This will be useful to any prospective buyer or tenant, or to anyone employed by them, like an estate agent or a surveyor, to identify the measure and confirm it's still there when the property changes hands.

Depending on the number of installed measures, adding too much information here could lead to the disclosure information being presented on two pages instead of one.

So Providers should satisfy themselves that they are content with the information they have entered.

*Figure 21 - Update measures*

The screenshot shows a web form titled "Update measures" with four sections, each for a different measure type. Each section contains the following fields:

- Measure Type:** A dropdown menu showing the selected measure type.
- Product Name:** A text input field.
- Repayment Date:** A date input field.
- Part-Financed by ECO:** A checkbox.

The four measures shown are:

- Measure Type:** B: Cavity wall insulation  
**Product Name:** Cavity wall insulation  
**Repayment Date:** 12/04/2034  
**Part-Financed by ECO:**
- Measure Type:** Q1: External wall insulation (100mm) to 100% of system built wall  
**Product Name:** External wall insulation  
**Repayment Date:** 12/04/2034  
**Part-Financed by ECO:**
- Measure Type:** X: High performance external doors  
**Product Name:** External doors  
**Repayment Date:** 12/04/2024  
**Part-Financed by ECO:**
- Measure Type:** U: Solar photovoltaic panels (2.5 kWp, orientation S)  
**Product Name:** Solar PV  
**Repayment Date:** 12/04/2034  
**Part-Financed by ECO:**

At the bottom right of the form, there is a note: "Plan details will appear on page 5 of all EPCs for this property" and three buttons: "Save", "Cancel", and "Preview PDF".

Once the measures have been updated with the correct information then the user must select save and the user will be asked to confirm the changes as shown in Figure 22 overleaf.

Figure 22 – Confirm Changes

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Home EPC Register Green Deal Address Administration Reports Logged in as admin Log Off Change Password

### Confirm Changes

Are you sure you wish to commit the following changes to this Green Deal Plan?

---

#### Plan Details

Plan ID: AB0000

Structure Changed Since Agreement:

Adheres To Consumer Credit Act:

Repayment Interest Rate: 6.00

Fixed Interest Rate:

APR: 7.00

GD Plan Uplift:

---

#### Register Documents

Domestic GDAR: 2343-1007-2609

GDIP: 1000000000

Green Deal Advice Report:

Plan Measure
Measure Type: B: Cavity wall insulation Product Name: Cavity wall insulation Repayment Date: 12/04/2034 Part-Financed by ECO: <input type="checkbox"/>
Measure Type: Q1: External wall insulation (100mm) to 100% of system built wall Product Name: External wall insulation Repayment Date: 12/04/2034 Part-Financed by ECO: <input type="checkbox"/>
Measure Type: X: High performance external doors Product Name: External doors Repayment Date: 12/04/2024 Part-Financed by ECO: <input type="checkbox"/>
Measure Type: U: Solar photovoltaic panels (2.5 kWp, orientation S) Product Name: Solar PV Repayment Date: 12/04/2034 Part-Financed by ECO: <input type="checkbox"/>

Finally click confirm button to save and the header will confirm that the plan has been saved as shown in Figure 23 overleaf.

Figure 23- Save confirmed

The screenshot shows the 'Green Deal Plan - AB0000' interface. At the top, there is a navigation bar with 'Home', 'EPC Register', 'Green Deal', 'Address', 'Administration', and 'Reports'. A 'Support' link is in the top right. Below the navigation bar, a green banner reads 'Green Deal Plan Saved'. The main content is split into two columns: 'Address' and 'Plan Details'. The 'Address' column shows 'Address: 91 MAUCHLINE'. The 'Plan Details' column shows 'Contact Details: Home Energy and Lifestyle Management Limited' and various financial and agreement details, including checkboxes for 'Structure Changed Since Agreement' and 'Adheres To Consumer Credit Act', and input fields for 'Repayment Start Date', 'Repayment End Date', 'Repayment Interest Rate' (6.96), 'Fixed Interest Rate' (checked), 'APR' (7.66), and 'GD Plan Uplift'. Below these are 'Total Daily Electricity Savings (£): 2.75', 'Total Daily Gas Savings (£): 0.00', and 'Total Daily Other Fuel Savings (£): 0.00'. A 'Register Documents' section on the left shows 'Pre-Install EPC: 2443-1007-2203', 'Post-Install EPC:', 'Domestic GDAR: 2343-1007-2503', and 'GDIP: 1000000000'. A large inset window displays four 'Plan Measure' entries: 1. Measure Type: B. Cavity wall insulation, Product Name: Cavity wall insulation, Repayment Date: 12/04/2034. 2. Measure Type: Q1: External wall insulation (100mm) to 100% of system built wall, Product Name: External wall insulation, Repayment Date: 12/04/2034. 3. Measure Type: X: High performance external doors, Product Name: External doors, Repayment Date: 12/04/2024. 4. Measure Type: U: Solar photovoltaic panels (2.5 kWp, orientation S), Product Name: Solar PV, Repayment Date: 12/04/2034. At the bottom of the inset, it says 'Plan details will appear on page 5 of all EPCs for this property' and has 'Save', 'Cancel', and 'Preview PDF' buttons.

When finished updating information about the measures installed, click **Preview PDF\*** to generate a draft (in pdf format) of how the disclosure information will appear on the EPC.

The preview document is not a valid legal document and should not be issued to a customer. The disclosure information will be added to an EPC only once the Green Deal plan goes Live.

*\* It should be noted that the preview of the disclosure page will show a revised updated date even if the plan has not been updated. (EST is aware of this issue and it will be fixed in a future release and does not affect the disclosure page once the plan goes live).*

There are 5 different statuses of a Green Deal Plan. These are as follows:

**New-** Plan has been entered on the system but customer has not signed off / any finance agreed.

**Pending** – Customer has agreed to plan but allowing 14 day cooling off period/ finance being agreed.

**Cancelled** – Plan has been cancelled and no finance has been agreed.

**Live-** Measures have been installed and the plan is live.

**Completed** – All finance has been paid off.

## 4.5 Confirming the Disclosure Information entered using the Plan Tool

The disclosure information for the Green Deal will now be held in the system. At this point the Provider should ensure that a new EPC is lodged for the property by an authorised assessor. This can be the assessor that carried out the original Green Deal Assessment, or a different one.

They will use information about the Green Deal installed measures to re-assess the energy performance of the property. The Scottish Government has confirmed that this does not require a further visit to the property.

Once this up to date EPC is lodged by an assessor, the Provider submits the information needed to finalise the Plan to the GDCC.

The GDCC then adds the charging information to the Plan Tool. This is the final step in confirming the Plan on the EPC.

Providers can then use the public EPC Register to download a pdf of the EPC with the disclosure information. To do this they will need to use the RRN for that EPC – EPCs retrieved from the Register using an address search will not include the disclosure information.

If on reviewing the document, they want to make changes to the disclosure information, they can do that using the Plan Tool as described above.

The disclosure page will appear on any EPC that is retrieved from the register where there is a Live Green Deal Plan on the property. This includes historic/ superseded EPCs.

## Document Control

Version	Date	Author	Comments
0.1	14/10/2013	Allan Vickers	Initial draft for review
0.2	16/10/2013	Rod Hanchard-Goodwin	Second draft following review
0.3	22/10/2013	Eilidh Donald	Third draft following review
0.3 a	22/10/2013	Rod Hanchard-Goodwin	Changes to document template
0.6	23/12/2013	Rod Hanchard-Goodwin	Changes from review by DECC plus pending section added
1.0	16/01/2014	Rod Hanchard-Goodwin	Final Version
1.1	01/07/2014	Allan Vickers	Updated version to clarify wording in Section 4.3 and tidy up overall page layouts
1.2	19/06/2015	Rod Hanchard-Goodwin	Updated wording and screenshots to change “What if run” to GDIP
1.3	26/06/2015	Rod Hanchard-Goodwin	Minor changes as requested by DECC as not all instances of GDIP updated in 1,2