



Domestic Energy
Assessment

User Guide

to the web-based booking system

This is a brief guide to ordering Energy Assessment Certificates (EPCs) and Home Information Packs (HIPs) online through Cal UK Ltd.

To login to the system

Point your web browser at <http://CAL-UK.co.uk/login.asp> Enter your username and password and click 'Submit'. The system will display a list of all of the instructions on your account (see below).

To enter a new EPC or HIP instruction

Click on 'New instruction'.

If you are not the default contact click on 'Lookup' and select your name from the list of staff members. If you are not on the list click 'Add Staff' and enter your details (see below).

If there is an estate agent who needs to receive the EPC and HIP click on 'Lookup' and select him/her from the list. If they are not on the list click 'Add agents' and enter their details (see below).

Select the service required (EPC only, HIP with personal search, HIP with local authority search).

Select 'On account' as payment method.

Enter the full 1st line of the address of the property (eg 27 Acacia Avenue) then enter the rest of the address including town and postcode. Please check the postcode is correct.

Select the property type and the number of bedrooms if known.

If ordering a full HIP, select the type of title and whether it is registered or unregistered.

If you know that the property is listed, in a conservation area, is system built (eg a pre-cast concrete ex-council house) or has a thatched roof please tick the appropriate box(es).

Enter your unique file reference. This will be quoted on invoices etc.

Enter the name of the vendor or the person to be contacted to arrange access to the property (eg 'Mrs V Smith' or 'Steve Fox at Hamptons') along with their telephone number(s).

Enter anything that you think may be helpful as notes (eg 'Vendor away until 23rd' or 'Probate case – keys requested').

Click 'Submit' and then click 'Close & refresh'. Your new instruction will be at the top of your list of instructions.

Displaying a previously entered instruction

By default the system displays a list of all of the instructions on your account with the most recent at the top. Instructions are colour-coded according to their status; red for new instructions, yellow once an appointment has been made to perform the energy assessment, green once the EPC is issued, blue once the HIP is complete and grey if cancelled. The contents of the Status field changes as the instruction progresses.

You can page forwards and backwards using 'Next page' and 'Previous page'.

To change the way the list is displayed click 'Display options'. You can then change the number of instructions shown per page, the order they are displayed in, which instructions are shown (by status) and which additional information is displayed. Make your selections and click 'Submit' to refresh the screen.

To display the detail of an instruction click on 'Details' against that instruction. The details you entered are displayed at the top. Next is information about the energy assessment, including the arrangements and who is doing it. If we are struggling to arrange an appointment with the vendor you can see the record of all attempts made to contact them here. Once the EPC has been issued its unique identifier is shown next and it can be downloaded from here. The HIP document follows once it is completed and it can also be downloaded from here.

Amending an instruction

Having displayed the details of the instruction as above, click on 'Edit' at the top of the screen to redisplay the edit screen. Make your amendments and click on 'Submit' to save your changes. This will trigger the Confirmation of Instruction email to be resent to all recipients.

You cannot amend an instruction if the EPC has already been issued.

Cancelling an instruction

You cannot cancel an instruction online. If you need to cancel an instruction please call Chris Loveys o 07711 601053.

Staff contacts

Each member of staff who is responsible for issuing EPC & HIP instructions should be entered as a 'staff contact'.

To add a member of staff click on 'Edit your details' then click on 'Add staff contacts'. Enter the name, telephone number and email address and click 'Update'.

To amend a staff member's details click on 'Edit' against their name then make the amendments and click on 'Update'.

To delete a member of staff click on 'Edit' against their name then click on 'Delete'.

3rd party contacts

Estate agents and any others who need to receive the EPCs & HIPs direct from the system should be entered as '3rd parties'.

To add a 3rd party on 'Edit your details' then click on 'Add 3rd parties'. Enter the organisation name, a contact name, telephone number and email address. Also tick either 'Selling Agent' or 'Conveyancer' as appropriate. Finally tick which email messages the 3rd party is to receive, and whether the EPC & HIP are to be attached to the emails. Then click 'Update'.

To amend a 3rd party's details click on 'Edit' against their name then make the amendments and click on 'Update'.

To delete a 3rd party click on 'Edit' against their name then click on 'Delete'.

Further help

If you need any further assistance please call Chris Loveys on 07711 601053.

Enhancements

If you feel that the system is not doing what you need it to do or if you believe it could do it better we would like to hear from you. Please email your suggestions for enhancements to Chris@CAL-UK.co.uk

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