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Certificate Creation Guide: Solar Thermal

Introduction

The purpose of this document is to guide the user through the process of creating an MCS certificate for solar thermal, on the MID. It includes a step-by-step guide on how to navigate this section.

You will need access to the MCS Installations Database (MID) as an MCS contractor.

1. Creating an MCS Certificate

MCS certificates can be created by MCS contractors on their MID accounts. To create a new certificate, select 'New Certificate' on the bar at the top of the page (as shown below).

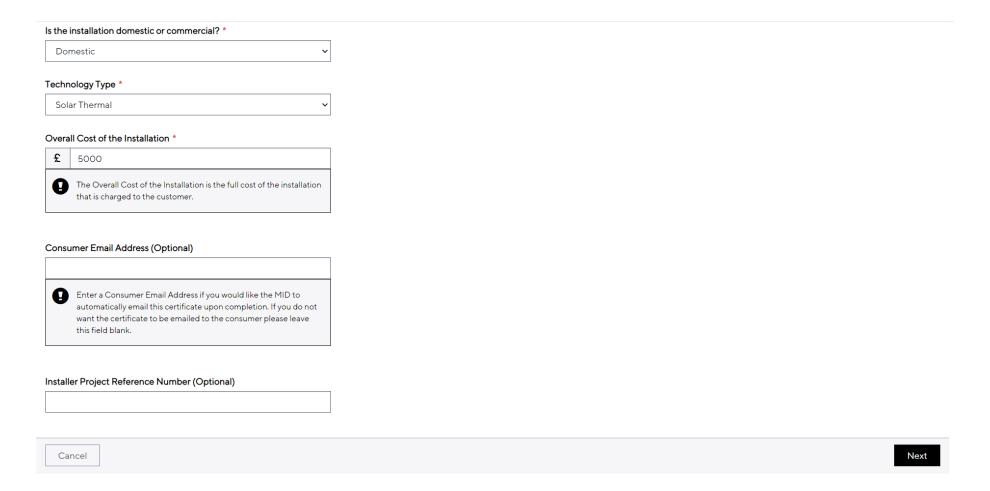


Please note: MCS Certificates should be created within 14 days of the system's commissioning, if you do not create the certificate within this commissioning window, the process of extended access needs to be followed (please see extended access guide).

1.1 Solar Thermal

The below section includes a step-by-step guide for Solar Thermal, which has a specific certificate journey on the MID.

1.1.1 Installation Type

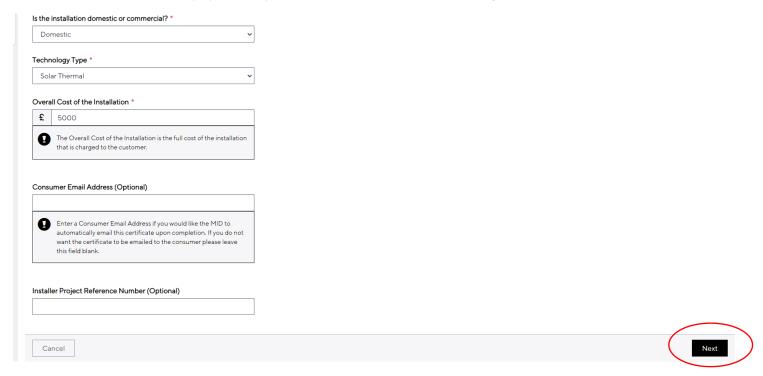


The first stage of the certificate creation, will involve populating the above mandatory fields with the relevant details, these fields are:

- Is the installation domestic or commercial?
- Technology type
- Overall cost of the installation (which is the full cost of the installation that is charged to the customer, including VAT). We recommend inputting the invoice cost to the consumer as the figure. There is a lower limit of £1000 and an upper limit of £50,000.

There is also the option to input the customer's email address if the contractor would like the certificate to be automatically sent to the relevant customer. If the contractor would prefer to provide the certificate to the customer directly, this field can be bypassed. An optional 'Installer Project Reference Number' field has also been added to this stage of the certificate, to allow installers to specify a project number that is associated with the installation

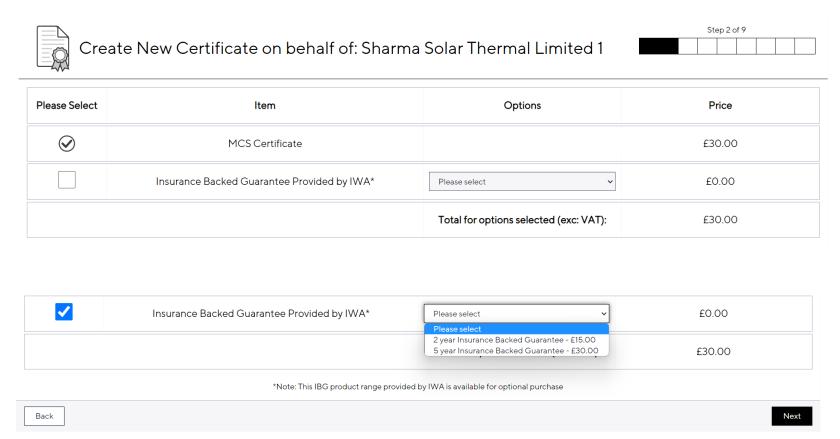
After these fields have been populated, please select 'Next' in the bottom right-hand corner:



After selecting next, a confirmation box will appear, asking for confirmation that the information that has been inputted is correct. As detailed below, these details will not be able to be amended later, unless the contractor contacts the MCS helpdesk.

Create New Certific	cate on behalf of: Sharma Solar Thermal Limited 1	Step 1 of 9
	Before progressing to generate the MCS certificate, please confirm that you have correctly selected that the installation is for either a domestic or a commercial property and that you have correctly input the total cost of the installation (this is the full amount that has been invoiced and includes VAT). You will not be able to edit this information once this certificate has been created.	
Back Cancel		Next

The following section is 'Step 2', in which the contractor can select whether they would like to purchase an Insurance Backed Guarantee (provided by IWA), alongside the MCS certificate (please see below).



The range of IBGs with different cover periods and premiums are displayed in the drop-down menu in the options column. The MCS contractor can choose which IBG product they would like to purchase, by selecting the tick box and selecting an IBG from the menu This IBG will be purchased at the same time as the MCS certificate, and the total will be added to the price column.

The selection of IBG products shown above, only applies to domestic contracts, for commercial contracts, it will appear slightly different. For commercial contracts, the IBG contract fee is 1% of the total cost of the installation, subject to a minimum fee based on domestic policy values e.g., if the commercial installation is £50,000 then the IBG is £500. The commercial policy always has a length of term of up to 10 years.

Sourcing an IBG from IWA is optional, so MCS-certified contractors are permitted to obtain IBGs from alternative IBG providers in the market (e.g. CPA, QANW). If an MCS-certified contractor chooses to do this, after 'Step 2', they are required to complete the below declaration, stating they will obtain an IBG from another provider (unless the installation is commercial).

Home / New Certificate		
Create New Certificate on	oehalf of: Sharma Solar Thermal Limited 1	Step 2 of 9
	Please note: You have opted to not purchase an IWA Insurance Backed Guarantee (IBG) via MCS. By ticking this box you are confirming that you understand that you must put an IBG in place with another provider if this installation is for a Domestic Consumer or the installation does not need an IBG, for example if it is a Commercial Installation or for a New Build.	
Back		Next

For more information on the IBG product range offered by IWA, please contact the MCS helpdesk/IWA for more information or look at the MCS MID Payment Gateway guidance document (which can also be provided by the MCS helpdesk).

Additional Note: The MCS contractor will still have the option to use any existing credits on their MID account before they completely move to the 'Pay as you go' PayPal purchase method. If a contractor chooses to use an existing credit, the price of the certificate will be listed as 'free', if the

contractor chooses to use the new payment method (not using credits), the price of the certificate will default to £30 (excluding VAT) (please see below).



Create New Certificate on behalf of: 0800 Repair Gas Services

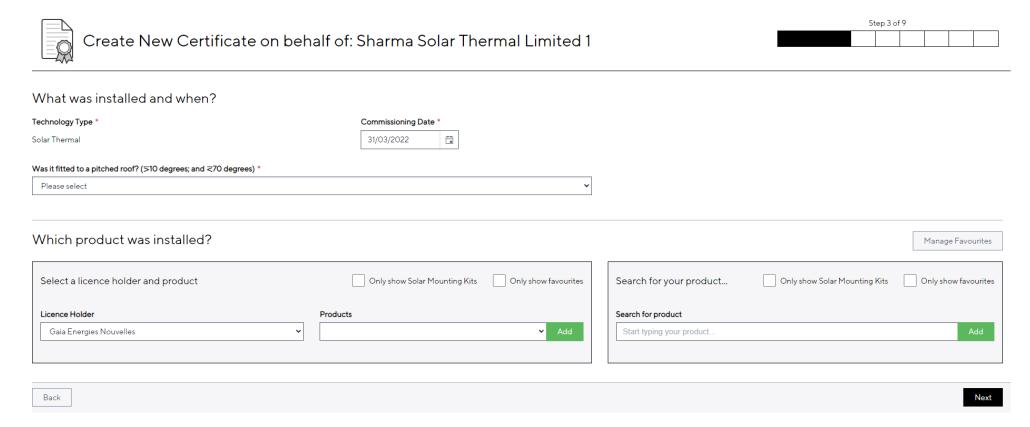
	51	ep 2 of	9		

Please Select	Item	Options	Price	
⊘	MCS Certificate	Use existing credit (2 remaining)	£30.00	

Please Select Item		Options	Price	
⊘	MCS Certificate	✓ Use existing credit (1 remaining)	Free	

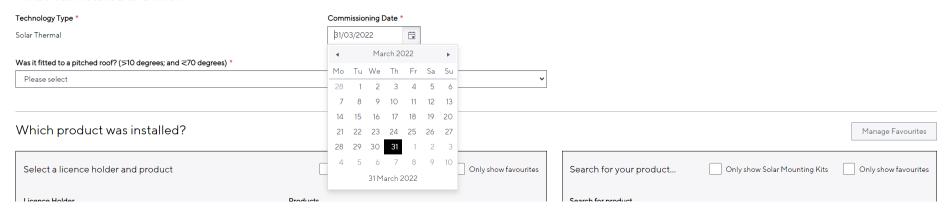
1.1.2 What was installed and when?

The next stage of creating the certificate relates to what Solar Thermal product was installed, along with the commissioning date of the installation.



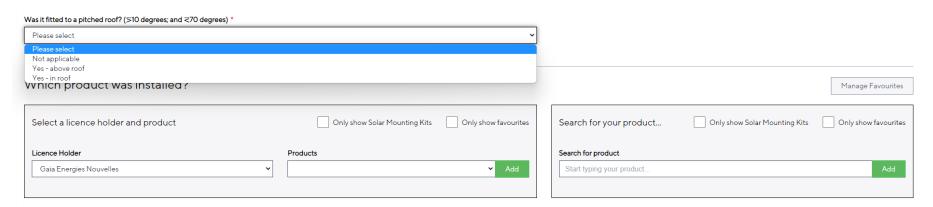
When a 'commissioning date' is selected for the installation, the commissioning date will automatically default to the day you are creating the certificate. To select a specific date, please select the calendar next to the commissioning date field (as displayed below).

What was installed and when?



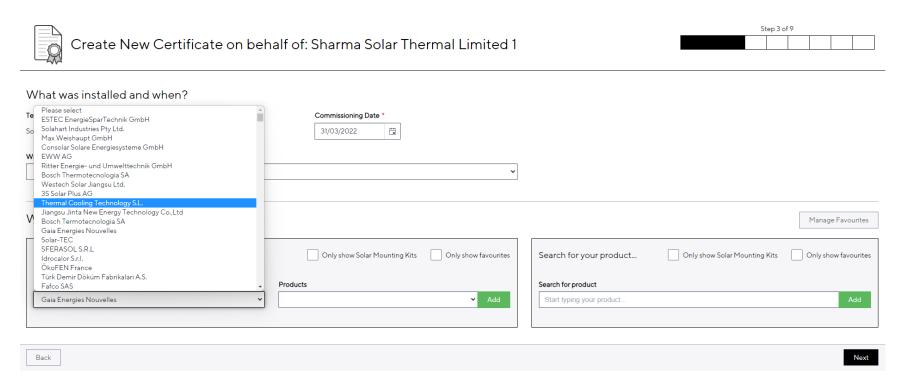
Please be aware that the MID will only allow you to place the commissioning date 14 days prior, due to the 14-day commissioning window. To place the date further back than the window, the process of extended access needs to be followed (see extended access guide)

The technology type will be automatically populated and for solar thermal, a further question will drop down beneath asking whether the installation was fitted to a pitched roof (please see below).



The options include Not Applicable, Yes (above roof), or Yes (in roof) – when selecting one of the yes options, this will require you to add a solar mounting product to the certificate, as well as the Solar Thermal product. If 'Not Applicable' is selected, you will not be required to add a solar mounting product to the certificate.

The next stage is to add the relevant products, to do this, there is a left-hand search function where the search can be refined by the license holder/manufacturer.

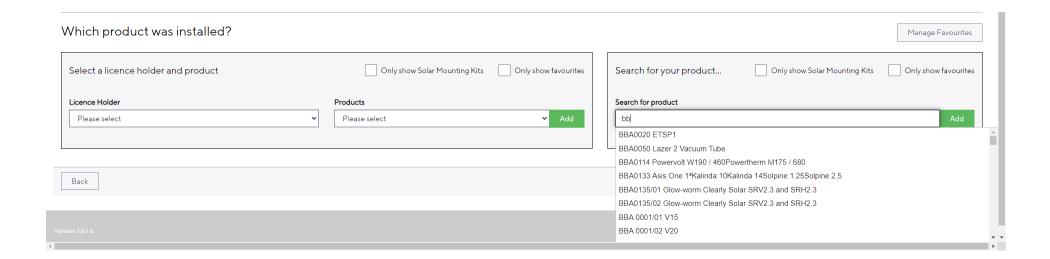




Which product was installed? Select a licence holder and product Licence Holder Solar-TEC Products Search for your product... Search for your product... Search for product...

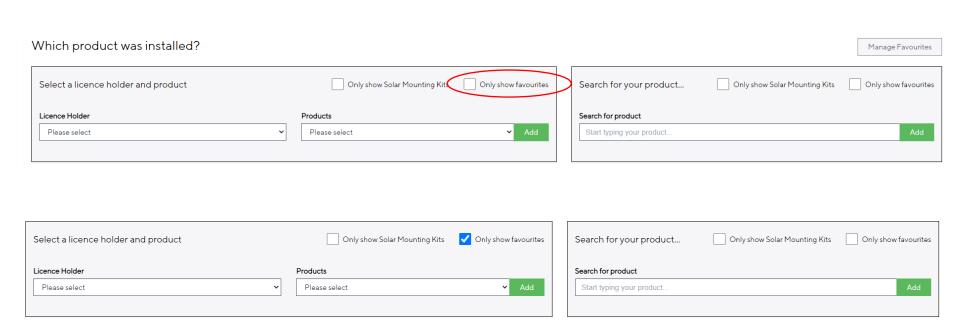
When the correct product has been selected, please select 'add' to add the product to the certificate.

The right-hand search function is a free text field that will require a product certification number or model number to be inputted (as shown below). Like the left-hand search function, select 'add' to add the product to the certificate.



Which product was installed? Select a licence holder and product Uicence Holder Products Please select Please select Manage Favourites Search for your product... BBA0020 ETSP1

Also, when adding products, there is an option for installers to use the product favourites option – if you select 'only show my favourites' in the product search boxes, it will only display the products that have been selected by the installer as a favourite.



To add a product as a favourite, add the product to the certificate and then select the star button as shown below.

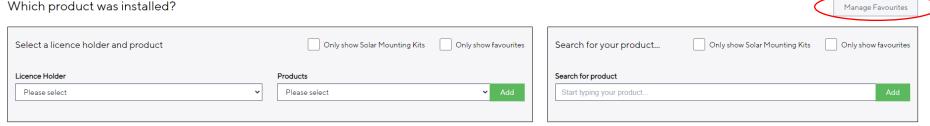
Which product was installed?

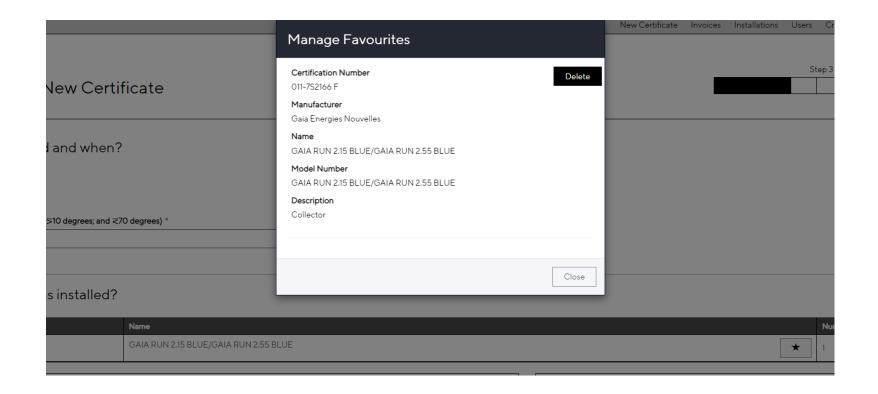


Manage Favourites

If an installer would like to manage their favourites - select 'manage favourites' on the right-hand side of the page. This will list all the favourite products currently listed.

Which product was installed?





Also next to the product, it will list a 'number installed' field – if it is concerning the number of solar thermal collectors you can either leave this as 1 or type in a number to reflect how many panels were installed. Either way, the total installed capacity field will indicate the size of the solar thermal system. However please be aware that if you type in the number of panels, the product will be listed multiple times on the certificate which can distort the format.

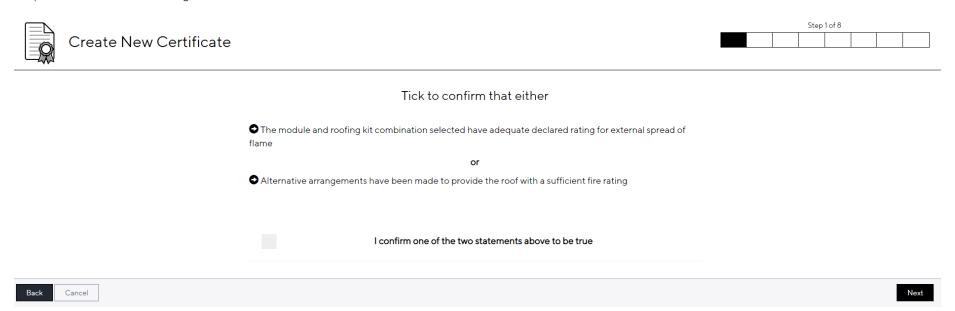
Which product was installed? Code Name 138BN-0 SFERASOL SF-A Manage Favourites Manage Favourites Number Installed x Delete

There is also the option to select the 'only show solar mounting kits' box to only show solar mounting products in the right and left-hand product search.

Select a licence holder and product	Only show Solar Mounting Kits Only show favourites	Search for your product Only show Solar Mounting Kits	Only show favourites
Licence Holder	Products	Search for product	
Please select 🔻	Please select Add	Start typing your product	Add

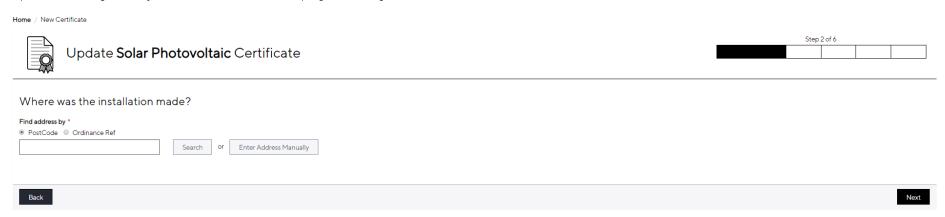
The next stage of the certificate will show the following page, which relates to the following standard on the website: MCS 012 and the Fire Performance of Pitched Roof Mounted Solar Systems Briefing (https://mcscertified.com/wp-content/uploads/2019/08/Briefing-MCS-012-and-Fire-Performance.pdf).

To proceed to the next stage, check 'I confirm one of the two statements to be true and then select 'next':



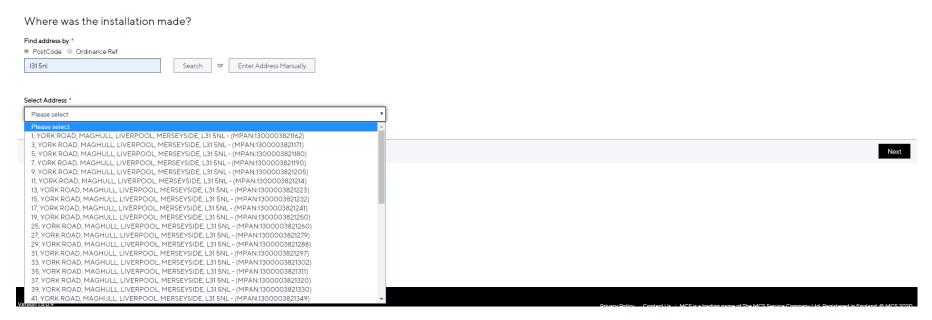
1.1.3 Address details

Upon selecting 'next' you will be directed to a page relating to the address of the installation:



There are two ways to input the address details, either by selecting a postcode or ordinance ref initially and selecting an address from a drop-down menu, or there is an option to enter the address manually.

To input, the address based on the postcode, input the postcode as shown below, this will then provide a list of addresses and corresponding MPANs, that fall under the inputted postcode.



Once the address is selected, it will appear on the right-hand side under the installation address, please click 'next' to proceed to the next stage:



To enter the address manually, select 'Enter Address Manually', you will then be directed to the page below.

Where was the installation made?	
Address Line 1 *	Installation address
Address Line 2	
Address Line 3	
County Please select	
Postcode *	
MPAN *	
or Search by Postcode	
Back	Next

The MPAN (Meter Point Administration Number) will either be 13 digits or 11 digits for an MPRN (Meter Point Reference Number), applying to NI.

If you do not have the MPAN at the point of creating the certificate e.g. if it applies to a new build, enter 13 space bars to proceed to the next stage.

However, when you do obtain the MPAN, please update this field on the certificate.

Where was the installation made?	
Address Line 1 *	Installation address
4 Broom Lane	4 Broom Lane, Liverpool, Argyll and Bute, L31 4TT
Address Line 2	
Liverpool	
Address Line 3	
County Argyll and Bute	
Postcode * L314TT	
MPAN * 1610004421192	
or Search by Postcode	
Back	Next

Address Line 1, Postcode, and MPAN (Meter Supply Number) are all mandatory fields, but we recommend filling in all the fields.

If you are attempting to create the certificate and do not have the meter supply number e.g. if the installation is on a new build, input 13 space bars into the MPAN field to proceed to the next stage. When you finally do obtain the MPAN number, you can input the correct MPAN number later once the certificate has been generated.

1.1.4 Installation Details



All the fields within this section are mandatory and will appear on the certificate.

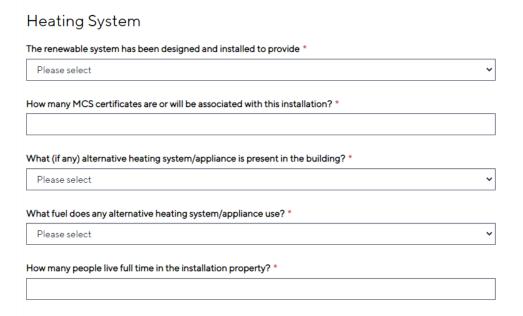
- The total installed capacity is required in kilowatts (kW) which is the peak capacity of the system.
- The estimated annual generation is required in kilowatts per hour (kWh) which is the estimated generation that a system will achieve in a year.
- For planning and building regulations these can be selected from a drop-down menu.
- For Green deal you will need to select no or yes, depending on whether the installation was paid for through a green deal scheme.

1.1.5 Heating System

The next stage of the certificate process is 'Heating system'.

This section has references to the purpose and condition of the system, how many MCS certificates are needed for the system, and if there are other heating systems in the building.

Each question has a drop-down box to select the correct answer for that specific installation, apart from 'how many MCS certificates' and 'how many people live full time' which are free text fields.



• Please note that on the drop-down menu for "The renewable system has been designed and installed to provide", "DHW" is an abbreviation for Domestic Hot Water.

1.1.6 Solar Panels

The next stage refers to the aperture area of the solar panels, please ensure the value is inputted in meters squared. Please select 'next' to proceed to the next stage:

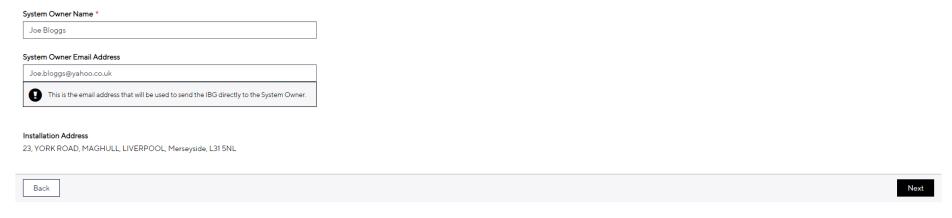
Home / New Certificate Create New Certificate on behalf of: Sharma Solar Thermal Limited 1	Step 7 of 9
Solar Panels What is the aperture area of the solar panels in m³? * m²	
Back	Next

1.1.7 IBG Policy Owner

The next step of the certificate is the 'Insurance Backed Guarantee Policy Owner' section, this page will request the system owner's name and email address. These details will not appear on the MCS certificate itself, but rather this information will be held in a report that will be sent to IWA regularly by MCS. The information is required so that IWA is aware of who to send the IBG details.

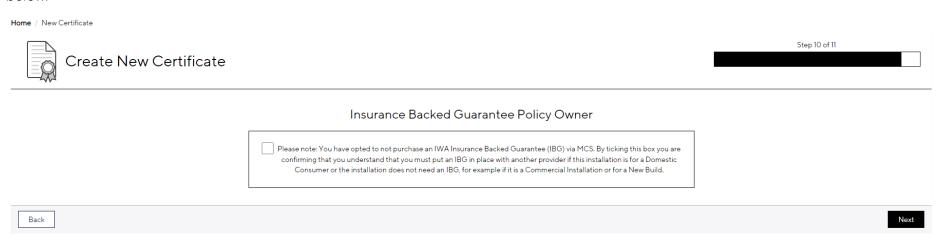
The installation address of the policy owner will already be pre-populated (please see below):

Home / New Certificate Step 8 of 9 Create New Certificate on behalf of: Sharma Solar Thermal Limited 1 Insurance Backed Guarantee Policy Owner As you have chosen to purchase an Insurance Backed Guarantee from IWA via MCS, this policy will be issued directly to the consumer within 10 working days of the MCS certificate being created. In order to do this, we need you to provide the details of the system owner. This information is required in order to provide an IBG directly to the System Owner, without this information IWA (the IBG provider) will not be able successfully process the application. Please only provide this information if you have been given permission from the System MCS will only collect the information you choose to give us, and we process it with your consent or on another legal basis. We only require the minimum amount of personal information that is required to resolve the IBG application. We do not sell this information to third parties although we may be required to share it with other organisations who are involved in the IBG Application Process, such as a IBG provider. MCS is compliant with the General Data Protection Regulation (GDPR). MCS Service Company Ltd is an Appointed Representative of Independent Warranty (IWA) who are authorised and regulated by the Financial Conduct Authority. Please note: if the system owner does not have a valid email address, the policy will be sent via post to the installation address System Owner Name System Owner Email Address This is the email address that will be used to send the IBG directly to the System Owner If you do not enter an email address, you will be charged an additional £0.66. Installation Address DARESBURY SCIENCE PARK, KECKWICK LANE, WARRINGTON, Cheshire, WA4 4FS Back

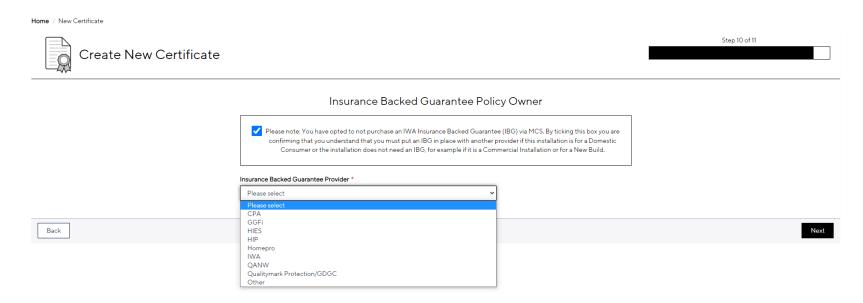


Once the correct details have been entered, please select 'Next' to proceed to the payment stage.

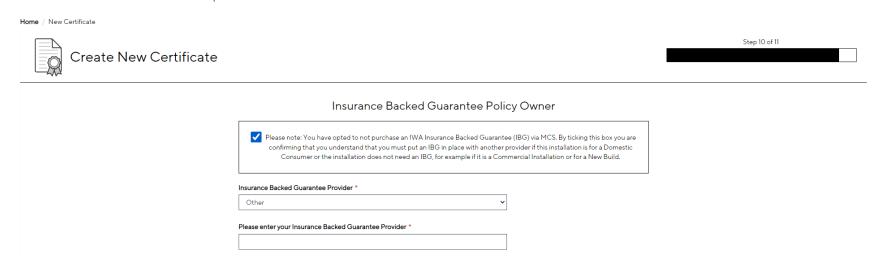
If an IBG has not been purchased via the MID, you will need to declare that you will raise an IBG with an alternative provider by selecting the box below:



Upon selecting the box, an Insurance Backed Guarantee Provider drop-down menu will appear where you must specify the alternative provider:

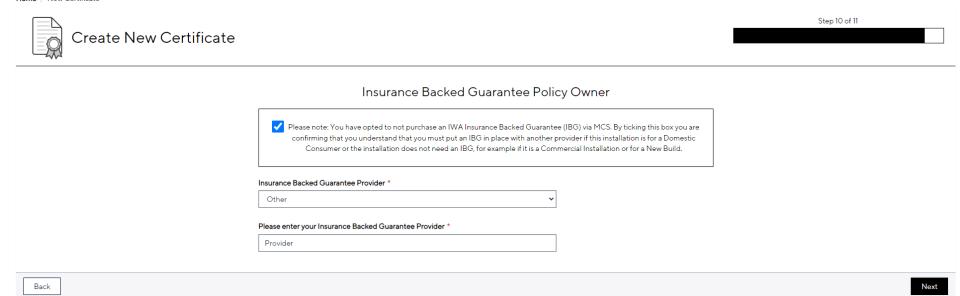


If the IBG provider you are raising the policy with is not in the drop-down menu, you can select 'other' and a free text field will appear where you can enter the name of the IBG provider:



Once you have entered the correct details, select 'next':

Home / New Certificate



1.1.8 Payment

When the MCS contractor reaches the final stage in creating their MCS certificate, the below page will show a breakdown of the certificate and IBG costs (if applicable). Two cost totals will be listed, a total including VAT and a total excluding VAT.

To process the payment, the contractor will have two options they can now choose from:

- 1) Select 'Pay with PayPal' to pay for the certificate/IBG immediately as a one-off payment, or
- 2) Add the certificate/IBG to the basket, to be purchased at a later time, perhaps with multiple MCS certificates

Both processes are outlined in the following two sections.



Pay as You Go Option

If the contractor would like to pay for the certificate immediately, the contractor will need to select 'Pay with PayPal' (see below). This will redirect the contractor to the PayPal portal in which they can either log in to their own PayPal account to pay from a PayPal balance or can pay with a debit/credit card. The contractor has the option to save their payment details on PayPal this will allow for the one-click payment system.

Step 11 of 11

Add to basket



Create New Certificate on behalf of: Tims Friendly Installation Company

Please click this button if you would like to add this certificate to your Installer's basket for payment at a later date.

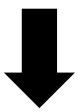
Item Name	Cost (ex VAT)	Cost (inc VAT)
MCS Certificate	£30.00	£36.00
Insurance Backed Guarantee Provided by IWA - 2 year Insurance Backed Guarantee	£15.00	£15.00
Total	£45.00	£51.00

The certificate will not be complete and and cannot be downloaded until payment is made from the basket screen.

Or, click this button to pay for this certificate now viaPayPal:

Pay with PayPal

Back





Log in to PayPal

Enter your email address or mobile phone number to get started.

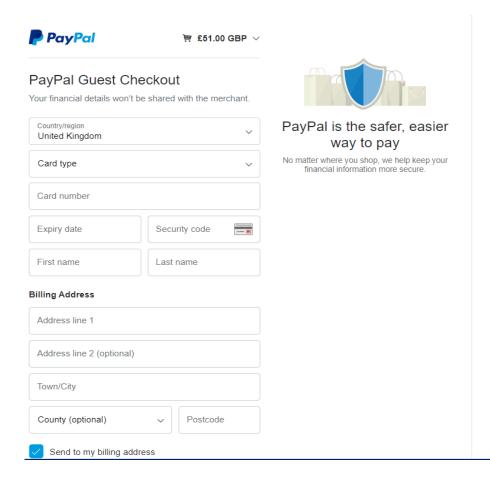
Email address or mobile number

Next

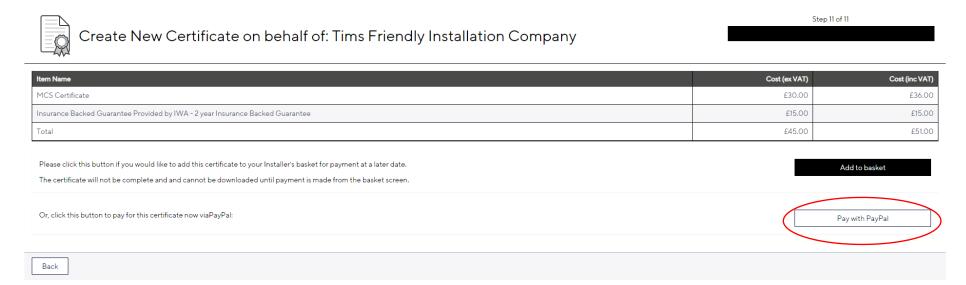
or

Pay by Debit or Credit Card

Cancel and return to Jagjit Dosanjh-Elton's Test Store



Once the payment has been approved the contractor should see confirm and make payment by clicking you are confirming that the payment is complete and that the amount has been charged to their chosen card. Secondly, on this page, the certificate will be available to download and a copy should be sent to the system owner.



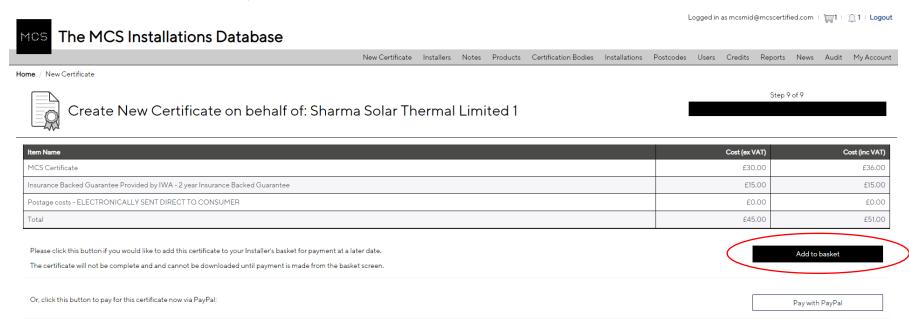
Upon selecting the 'confirm and make payment' button, the certificate will be available to download, and a copy should be sent to the system owner (if the contractor has not requested the MID send the certificate automatically).

Home / New Certificate Step 9 of 9 Create New Certificate Installation Complete Certificate Number: MCS-01239090-H Installation Address: YORK ROAD MAGHULL, LIVERPOOL Merseyside L31 5NL Download Certificate Products Installed: BABT8767-10-03-415W/CS3W-415P Insurance Backed Guarantee Policy Purchased Thank you for purchasing an IWA Insurance Backed Guarantee via MCS. These details have now been passed on to IWA to raise the policy. This policy will be issued directly to the system owner within 10 working days. Return to My Installations Return to Home page

Note: Payment receipts for the MID purchases will be sent to the email listed on the contractor's MID account. This receipt will include a breakdown of the products purchased, and a VAT breakdown and will also contain the relevant VAT registration number.

Using the Installer Basket

If the contractor would prefer to pay for the certificate and IBG (if applicable), later or with other MCS certificates (in bulk), the contractor can select 'add to basket' to add the MID products to the installer basket.



The MID will then direct the contractor to the 'Basket for installer' area (see below):



The basket will now list the technology type of the certificate added, the date and time the certificate was created, along with the address details and the total spend. The certificate will remain in the basket until the contractor selects 'Purchase selected'.

There is also the option to edit the certificate while it remains in the basket, by selecting 'edit' (see above). Upon clicking edit, a new tab will open on the edit page of the relevant certificate.

Note: the status of the certificate will remain as 'in basket' and will not be officially generated until the payment has been made.

Contractors are also able to add several other certificates to the basket if they would like to pay for several certificates in one transaction (example below):

Purchase selected					Select all Un-select all	Remove selected
				L	J	
Please Select	Edit Certificate	Technology Type	Created Date	Address	Postcode	Total Spend
✓	Edit	Solar Photovoltaic	17/03/2021 09:14	7	L31 5NL	£81.00
✓	Edit	Air Source Heat Pump	17/03/2021 13:15	36	L31 5NL	£76.00
✓	Edit	Solar Thermal	17/03/2021 13:31	3	L31 5NL	£66.00
					Total (inc: VAT)	£223.00

Once 'purchase selected has been selected, the below screen will appear, providing a breakdown of the MID purchases. To complete the payment, the contractor must select 'Pay with PayPal'. This will direct the contractor to the PayPal portal, in which they can either log in to their own PayPal account to pay from a PayPal balance or can pay with a debit/credit card.

Home / Basket / Payment



Basket Payment (Sharma Solar Thermal Limited 1)

Item Name	Postcode	Address	Cost (ex VAT)	Cost (inc VAT)
MCS Certificate	WA4 4FS	DARESBURY SCIENCE PARK	£30.00	£36.00
Insurance Backed Guarantee Provided by IWA - 2 year Insurance Backed Guarantee	WA44FS	DARESBURY SCIENCE PARK	£15.00	£15.00
Postage costs - ELECTRONICALLY SENT DIRECT TO CONSUMER	WA44FS	DARESBURY SCIENCE PARK	£0.00	£0.00
Total			£45.00	£51.00

Please click the button to authorise payment using PayPal:

Pay with PayPal

Cancel

To complete the payment, select 'Confirm and make payment':

Home / Basket / Payment



Basket Payment (Sharma Solar Thermal Limited 1)

Item Name	Postcode	Address	Cost (ex VAT)	Cost (inc VAT)
MCS Certificate	WA4 4FS	DARESBURY SCIENCE PARK	£30.00	£36.00
Insurance Backed Guarantee Provided by IWA - 2 year Insurance Backed Guarantee	WA4 4FS	DARESBURY SCIENCE PARK	£15.00	£15.00
Postage costs - ELECTRONICALLY SENT DIRECT TO CONSUMER	WA4 4FS	DARESBURY SCIENCE PARK	£0.00	£0.00
Total			£45.00	£51.00

Thanks <u>for autherising paymen</u>t with PayPal. Please check the details above and, if you're happy, click the button below to complete payment.

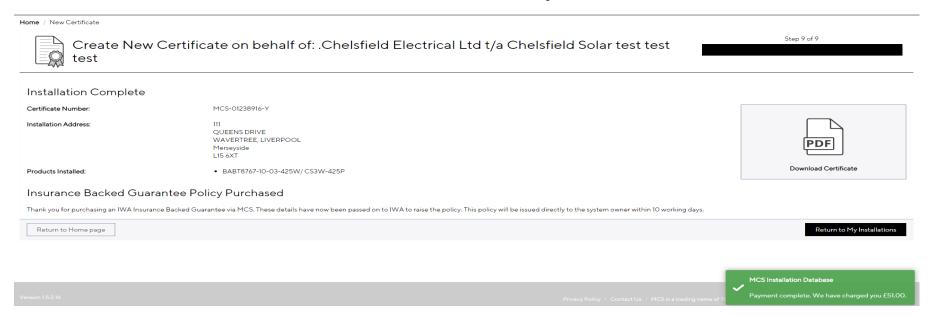
Confirm and Make Payment

Once the payment is complete, the below page will appear showing the basket is now empty and the certificate/certificates will now be available to be downloaded in the installations tab. Any IBGs purchased will be sent over to IWA every week and the system owners should receive the policies within 10 working days.

Note: Again, like the Pay as You Go method payment receipts for the MID purchases will be sent to the email listed on the contractor's MID account. This receipt will include a breakdown of the products purchased in the one transaction, and a VAT breakdown, and will also contain the relevant VAT registration number.

1.1.9 Download MCS Certificate

After the certificate and payment are complete, the certificate is then available for download in PDF format and will now appear in the 'installations' section of the MID, under the MCS certificate number it has been assigned:



The contractor can select 'Return to My Installations' to view the certificate in the installations tab. The contractor is then required to provide the MCS certificate to the consumer once generated.

Note: In terms of the IBG policy that has been purchased, the details are passed on to IWA by MCS to raise the policy. This policy will be issued directly to the customer within 10 working days.

2 What to Do If There Is a Problem?

If you have difficulty resolving an issue with the certificate creation section, please email MCS Helpdesk at mcscertified.com

For more information about IWA, please visit <u>www.iwa.biz</u>.

AMENDMENTS ISSUED SINCE PUBLICATION

Document Number	Approval	Amendment Details	Date
1.0	Approved by MCS Operations Team	First Issue	4/12/2020
1.1	Approved by MCS	Installer Basket	6/4/2021
	Operations Team	Amendments	
1.2	Approved by MCS	RHI Closure Amendments	1/4/2022
	Operations Team		