

MCS MID GUIDANCE DOCUMENT

Certificate Creation Guide: Heat Pump Technologies

Introduction

The purpose of this document is to guide the user through the process of creating an MCS certificate for heat pump technologies (e.g., air source heat pump, ground/water source heat pump) 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' located at the top of the page on the MID (as shown below).

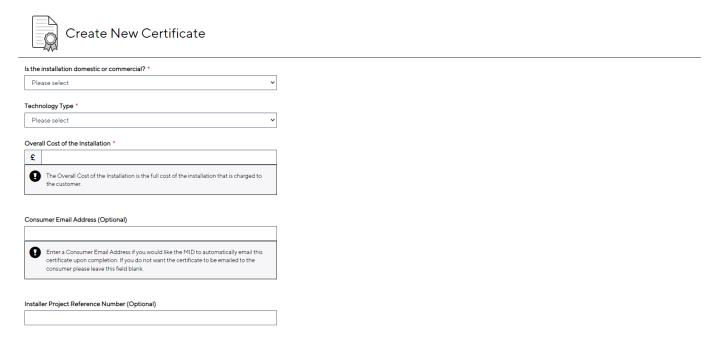
Please note: MCS Certificates should be created within 14 days of the system's commissioning, if you do not create the certificate within this commissioning window, the process of extended access needs to be followed (please see extended access guide).



1.1 Heat Pump Technologies

The below section includes a step-by-step guide for heat pump certificates, including Air Source Heat Pump and Ground Source Heat Pump technologies, which have a similar certificate journey on the MID.

1.1.1 Installation Type



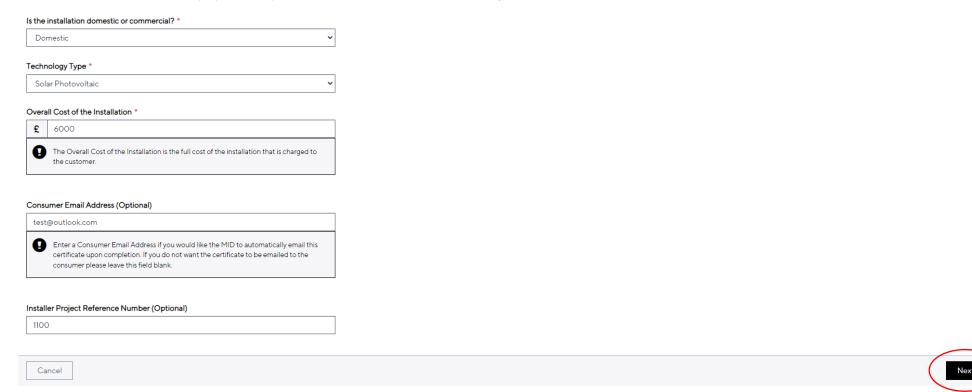
The first stage of the certificate creation, will involve populating the above fields with the relevant details, these fields are:

- Is the installation domestic or commercial?
- Technology type of the installation

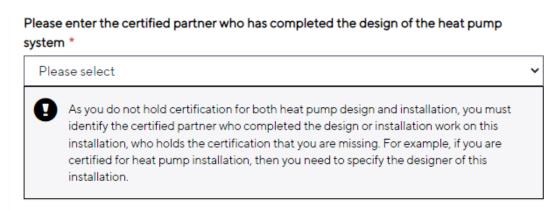
• Overall cost of the installation (which is the full cost of the installation that is charged to the customer, including VAT). We recommend inputting the invoice cost to the consumer as the figure. There is a lower limit of £1000 and an upper limit of £150,000.

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.

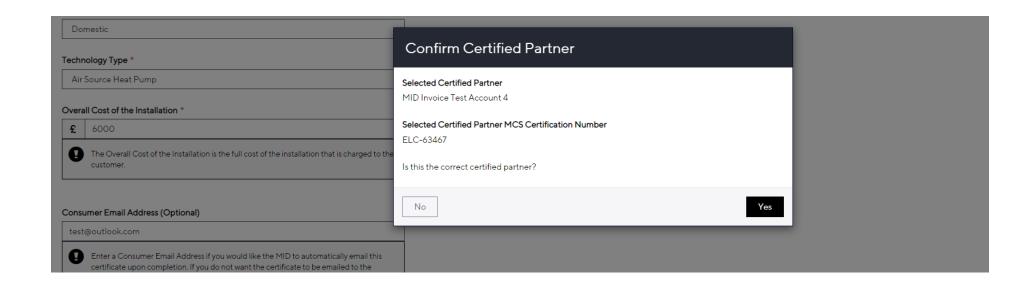


For MCS contractors who are certified for solely 'Heat Pump – Design' or 'Heat Pump – Installation', there will be an additional field where the main contractor needs to identify the other installer/designer (certified partner) who completed the work that the main contractor is not certified for. For example, if you as the main contractor are only certified for 'Air Source Heat Pump – Installation', you must identify who the MCS-certified air source heat pump designer was for the installation.

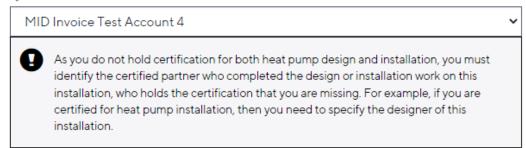


Note: this question will not appear if you are certified for Heat Pump – Design and Heat Pump – Installation, in compliance with the new MIS 3005 Standards.

Upon selecting the certified partner from the drop-down menu above, a validation box will appear with the certified partner's name and MCS certification number to confirm that you have selected the correct certified partner. If you have selected the correct certified partner, select 'Yes' and the drop-down menu will remain populated, and you can proceed.



Please enter the certified partner who has completed the design of the heat pump system *



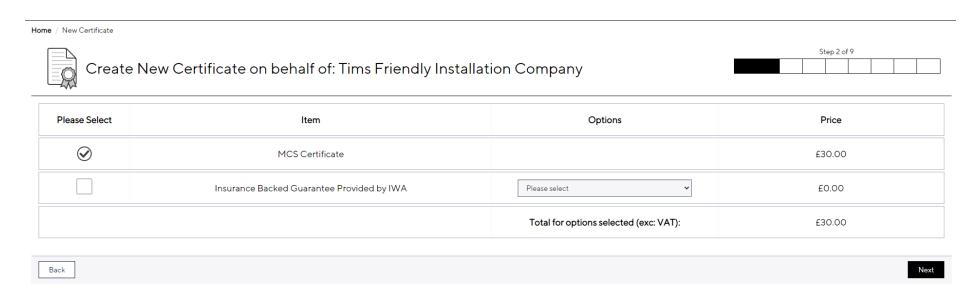
If you select 'No' you will be redirected to the question where you must identify the correct certified partner. Once you have identified the correct certified partner, select 'Next' to proceed.

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.

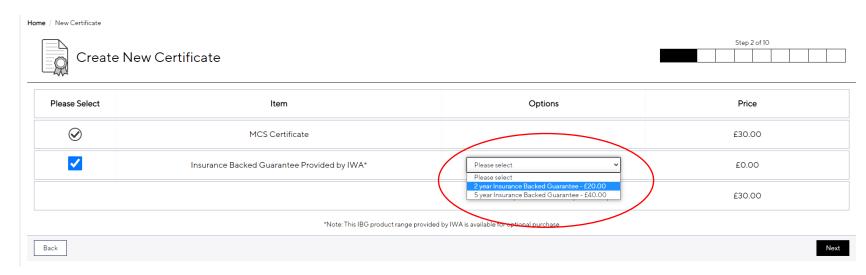
Create New Certificate on behalf of: Tims Friendly Installation Company

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.

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), along with the MCS certificate (please see below).



The range of IBGs with different lengths of terms is 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 (as shown below). This IBG will be purchased at the same time as the MCS certificate, and the total will be added to the price column.



After selecting an IBG, the price will be added to the certificate price (£30 excl. VAT):





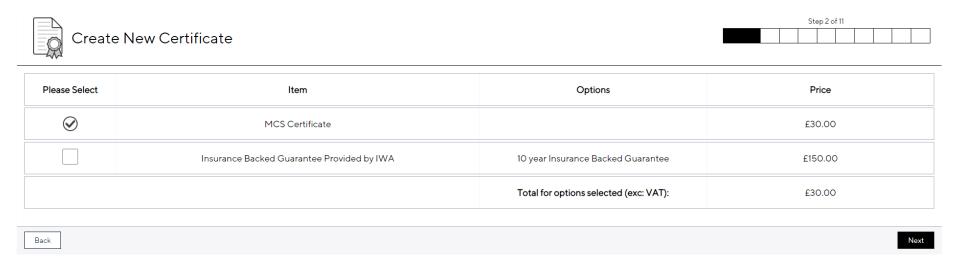
Please Select	Item	Options	Price
⊗	MCS Certificate		£30.00
✓	Insurance Backed Guarantee Provided by IWA*	2 year Insurance Backed Guarantee - £20.00 🔻	£20.00
		Total for options selected (exc: VAT):	£50.00

*Note: This IBG product range provided by IWA is available for optional purchase

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Next

The selection of IBG products shown above, only applies to domestic contracts, for commercial contracts, it will appear slightly different (please see below). 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 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	behalf 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:

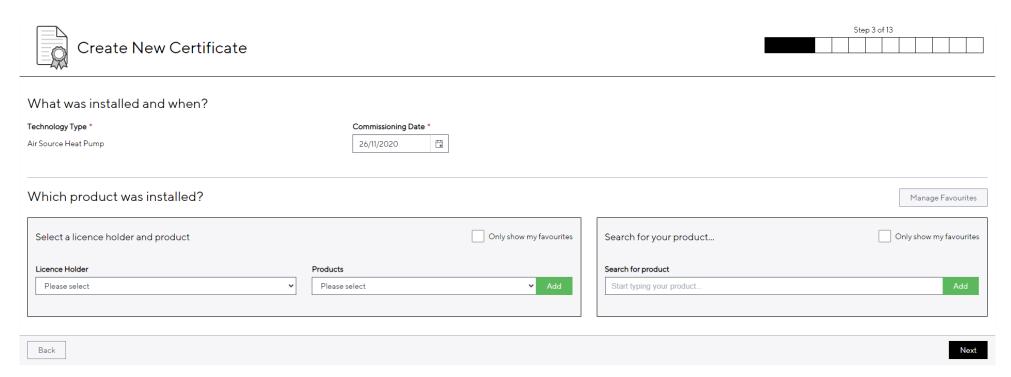
the MCS contractor will still have the option to use any existing credits on their MID account before they completely move to the 'Pay as you go' PayPal purchase method. If a contractor chooses to use an existing credit, the price of the certificate will be listed as 'free', if the contractor chooses to use the new payment method (not using credits), the price of the certificate will default to £30 (excluding VAT) (please see below).



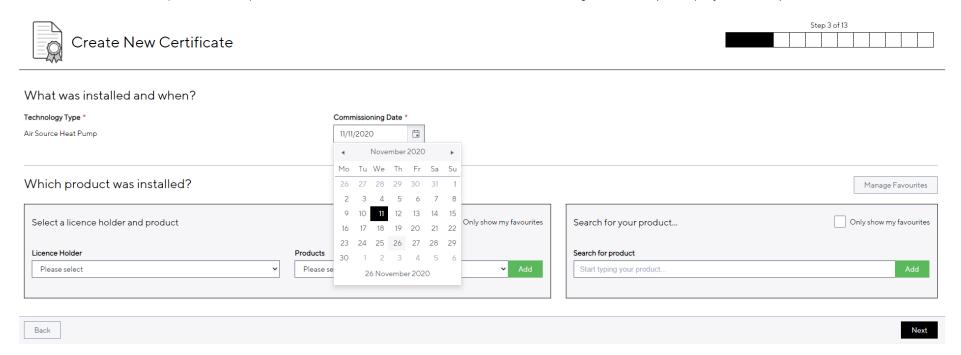
Please Select	Item	Options	Price
⊘	MCS Certificate	✓ Use existing credit (1 remaining)	Free

1.1.2 What was installed and when?

The next stage of creating the certificate relates to what heat pump product has been installed, along with the commissioning date of the installation.

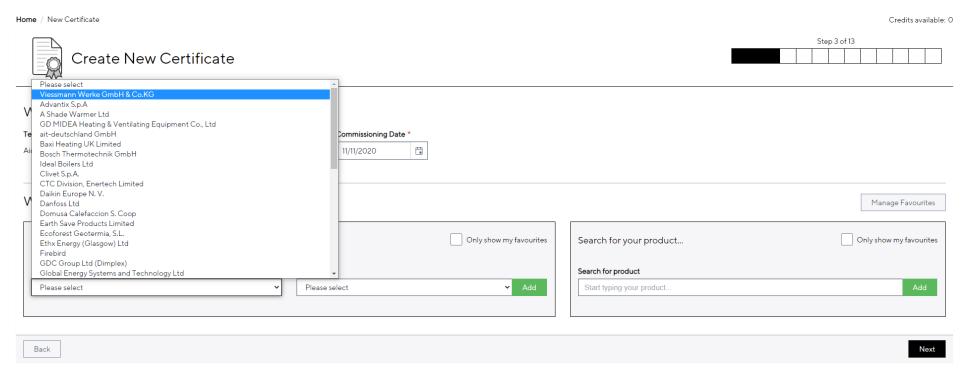


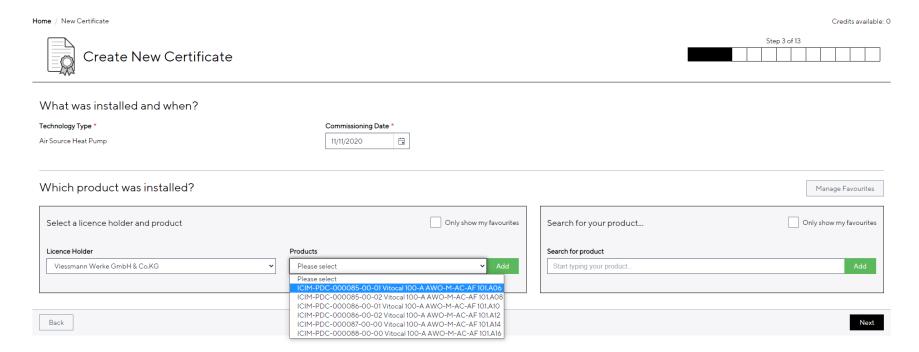
Firstly, select a 'commissioning date' for the installation, the commissioning date will automatically default to the day you are creating the certificate. To select a specific date, please select the calendar next to the commissioning date field (as displayed below).



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.

The next step is to add the relevant product, to do this, there is a left-hand search function where the search can be refined by license holder/manufacturer, then by-product:



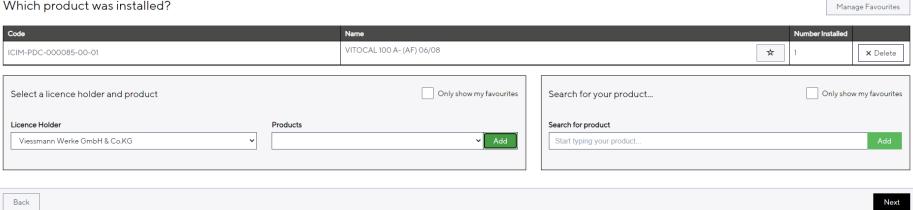


Once the correct product has been selected, select 'add' to add the product to the certificate (please see below):

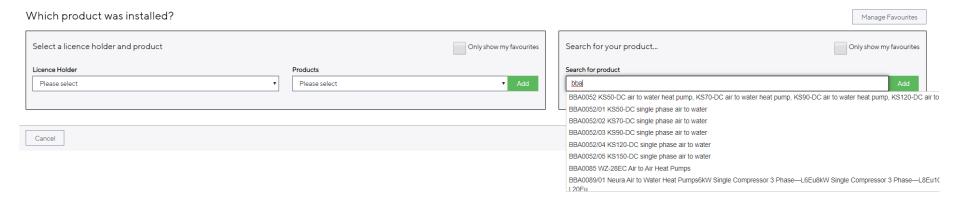
Which product was installed?				Manage Favourites
Select a licence holder and product		Only show my favourites	Search for your product	Only show my favourites
Licence Holder Viessmann Werke GmbH & Co.KG	Products → ICIM-PDC-000085-00-01 Vitocal 100-	A AWO-M-AC-Al ➤ Add	Search for product Start typing your product	Add
Back				Next

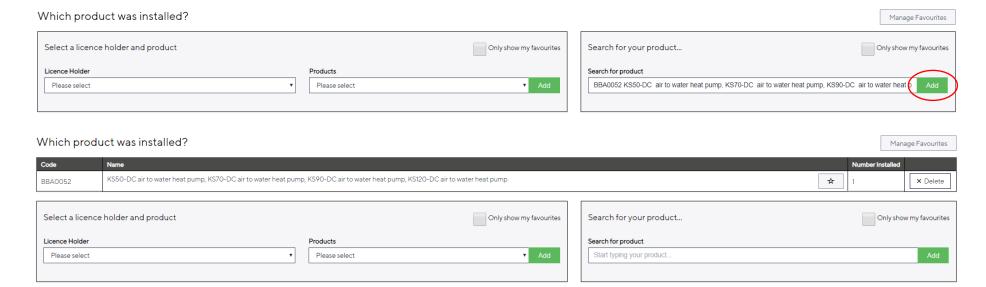


Which product was installed?



Alternatively, the right-hand search function can be used to add the product, which is a free text field that will require a product certification number to be inputted (as shown below).

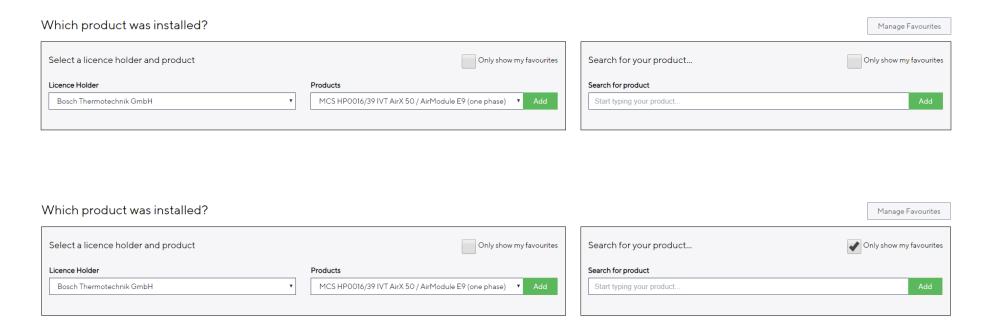


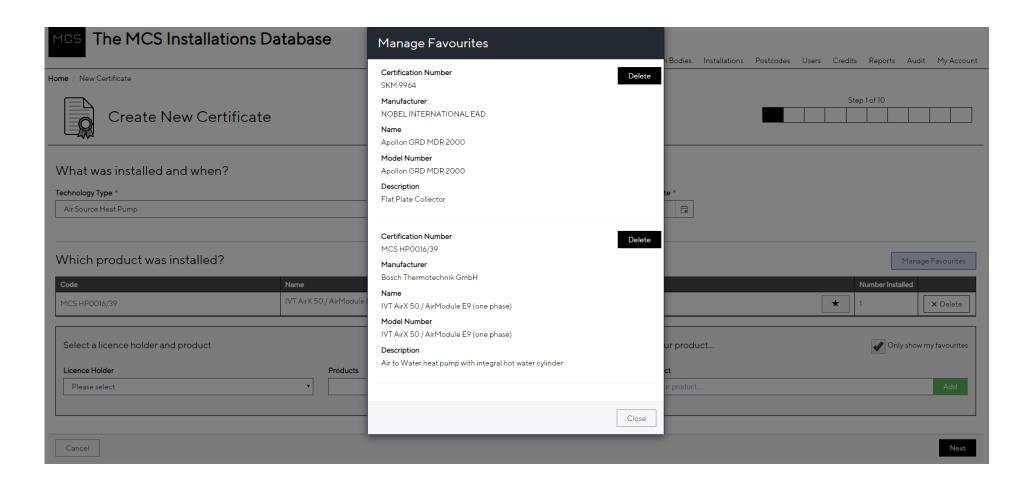


Next to the product, it will list a 'number installed' field – this will usually be one but may be amended to a higher value e.g. if two heat pumps are installed in one area zone. Either way, the total installed capacity field will indicate the size of the system.

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.

In addition, 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.





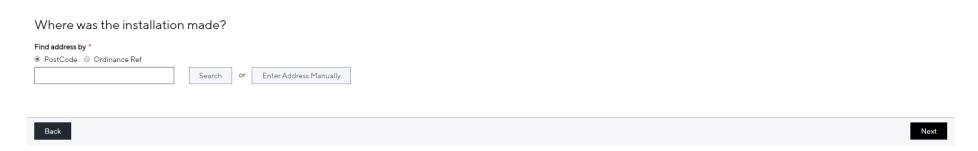
To add a product to the favourites list, add the product to the certificate and then select the start button as shown below.

Which product was installed?

Code	Name	Number Installed	
MCS HP0016/39	IVT AirX 50 / AirModule E9 (one phase)	1	× Delete

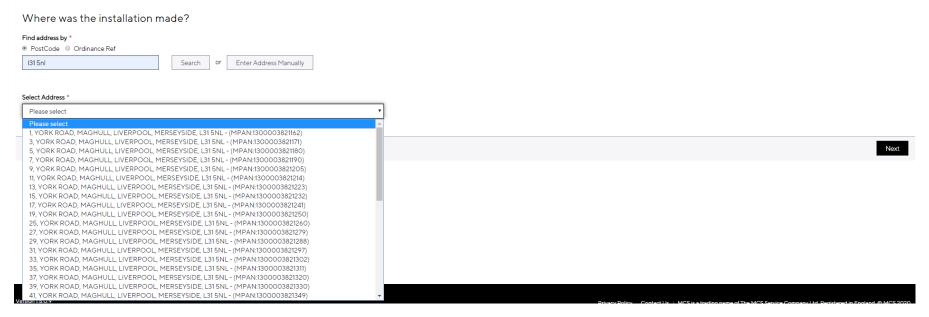
1.1.3 Address details

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.



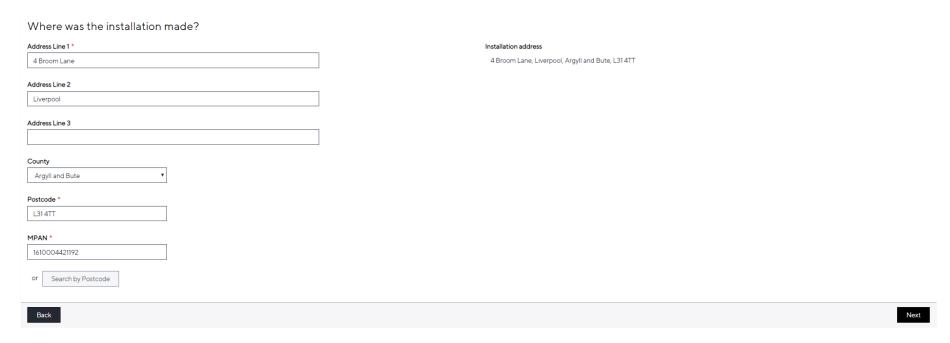
Once the address is selected, it will appear on the right-hand side under the installation address, please click 'next' to proceed to the next stage:



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

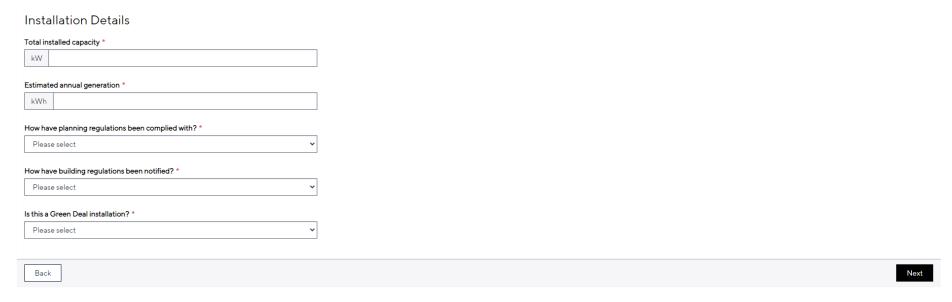
Where was the installation made?	
Address Line 1 *	Installation address
Address Line 2	
Address Line 3	
County Please select ▼	
Postcode *	
MPAN *	
or Search by Postcode	
Back	Next

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 the property is a new build), enter 13 space bars to proceed to the next stage. However, when you do obtain the MPAN, please return to the certificate on the MID and update this field.



Address Line 1, Postcode, and MPAN (Meter Supply Number) are all mandatory fields, but we recommend filling in all the fields to ensure that all the address details are on the certificate.

1.1.4 Installation Details



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

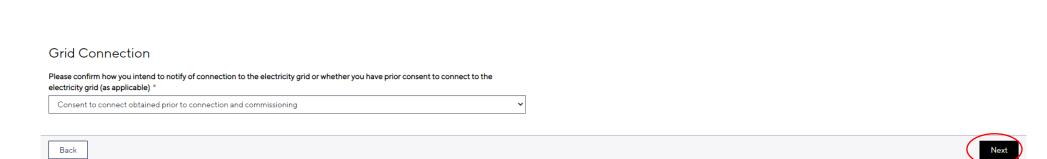
- The total installed capacity is required in kW which is the peak capacity of the heat pump system.
- The estimated annual generation is required in kWh which is essentially the estimated generation that the heat pump system will achieve in a year.
- For planning and building regulations the relevant option 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 Grid Connection

The next step of the certificate refers to the connection of the heat pump to the national grid, the correct option can be selected from the drop-down menu as shown below. If you cannot provide an answer, 'Not Applicable' can be selected.

Please click 'next' to proceed to the next stage of the certificate:

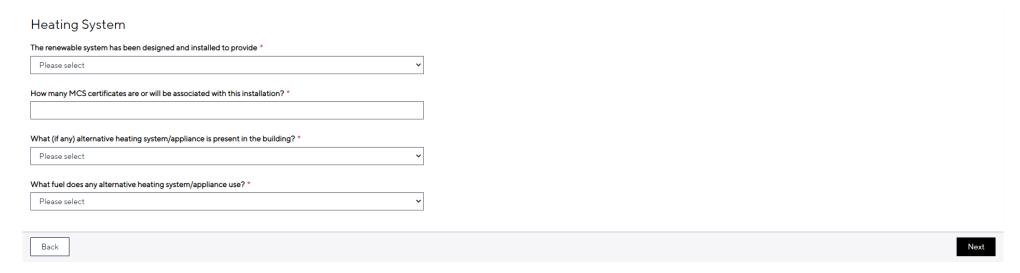
Please confirm how you intend to notify of connection to the electricity grid or whether you have prior consent to connect to the electricity grid (as applicable) * Please select Please select Consent to connect obtained prior to connection and commissioning Not Applicable To be notified post connection and commissioning



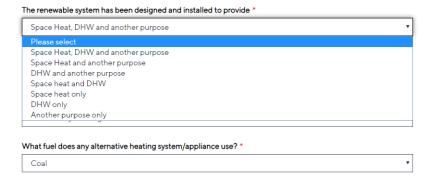
1.1.6 Heating system

The next stage of the certificate creation focuses on the 'Heating system'. This section has references to the purpose and condition of the heat pump system, how many MCS certificates are associated with the system, and if there are any other heating systems in the building.

Each question has a drop-down menu to select the correct answer from, apart from question 2, 'how many MCS certificates', which is a free text field.



Note: all these fields are mandatory in this section.



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• 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.

1.1.7 Space and Water

The next section 'Space and Water' requires details about the space/water heating supply and demand. Please ensure that the figures entered are given in the unit of kilowatt per hour.

Note: if the system only provides space or water heating, the contractor can enter 'O' into the relevant fields that do not apply to the installation.

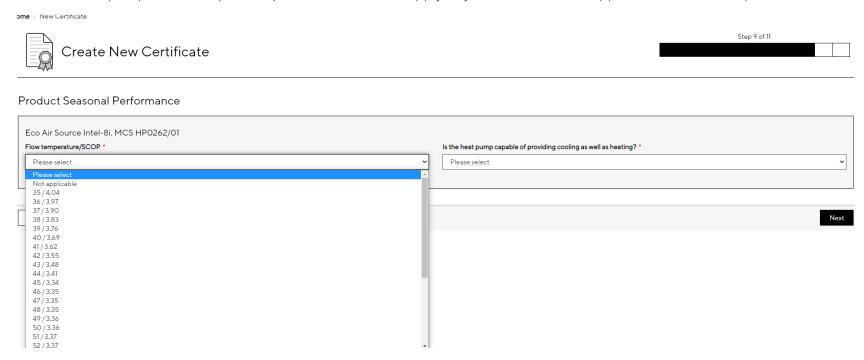
Please select 'next' to proceed to the next stage:

Space and Water
State the annual space heating requirement for the building - i.e. the annual space heating demand in kWh/annum as calculated based on MIS *
kWh
State the annual water heating (DHW) requirement for the building/occupancy – i.e. the water heating demand in kWh/annum as calculated based on MIS *
kWh
State the annual space heating to be supplied by the installed renewable heating technology – i.e. the amount of annual space heat demand in kWh/annum supplied by the renewable heating system (excluding any auxiliary heating supplied by auxiliary / immersion heaters) as calculated based on MIS *
kWh
State the annual water heating (DWH) to be supplied by the installed renewable heating technology - i.e. the amount of water heating (DWH) demand in kWh/annum supplied by the renewable heating system (excluding any auxiliary heating supplied by auxiliary / immersion heaters) as calculated based on MIS *
kWh

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1.1.8 Product Seasonal Performance

This stage requires the relevant flow temperature/SCOP for the heat pump product to be selected. This is selected using a drop-down menu, in which a selection of corresponding flow temperature/SCOP appears (as shown below). If you are creating a certificate for an exhaust air heat pump or solar-assisted heat pump, a flow temperature/SCOP value will not apply so you can select 'Not Applicable' from the drop-down menu.



Note: the SCOP data is pre-populated on the product entries in the MID, by the product certification body. If the SCOP data appears to be incorrect or has not been inputted into the product entry, please contact the product CB to query this.

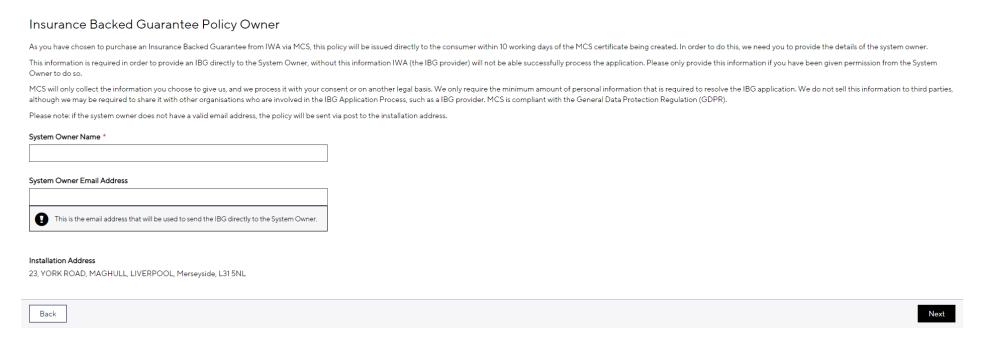
The second part of this section involves selecting whether the heat pump is capable of cooling as well as heating. You are required to select 'yes' or 'no' from the drop-down menu. Once the appropriate answers have been inputted, select 'next'.

Home / New Certificate Step 9 of 11 Create New Certificate Product Seasonal Performance Eco Air Source Intel-8i, MCS HP0262/01 Flow temperature/SCOP * Is the heat pump capable of providing cooling as well as heating? * 44 / 3.41 Please select No Yes Back Home / New Certificate Step 9 of 11 Create New Certificate **Product Seasonal Performance** Eco Air Source Intel-8i, MCS HP0262/01 Flow temperature/SCOP Is the heat pump capable of providing cooling as well as heating? * 44 / 3.41 No Back

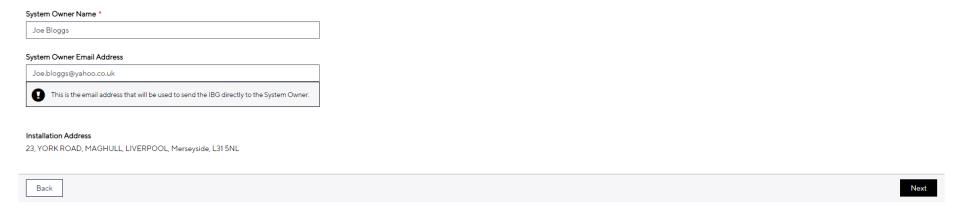
1.1.9 IBG Policy Owner

Step 10 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 policy documentation.

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

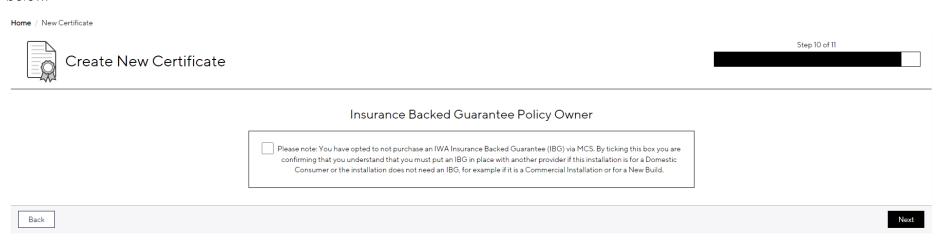


Note: this page will only appear if an IWA IBG has been selected by the contractor, through the MID.

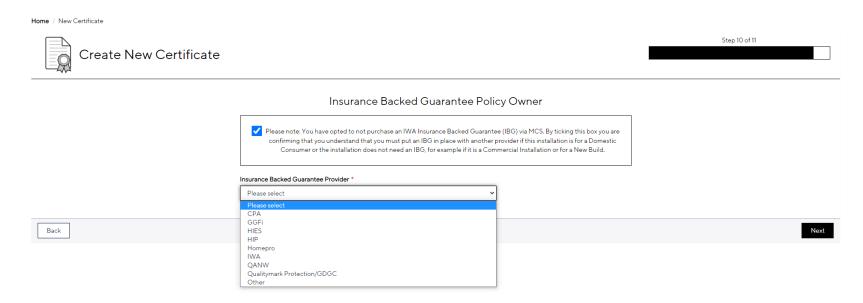


Once the correct details have been entered, please select 'Next' to proceed to the payment stage.

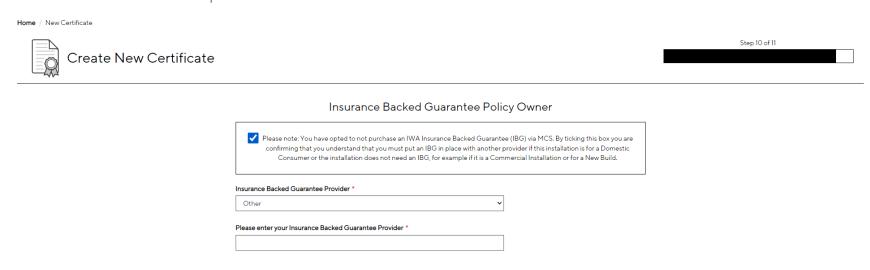
If an IBG has not been purchased via the MID, you will need to declare that you will raise an IBG with an alternative provider by selecting the box below:



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

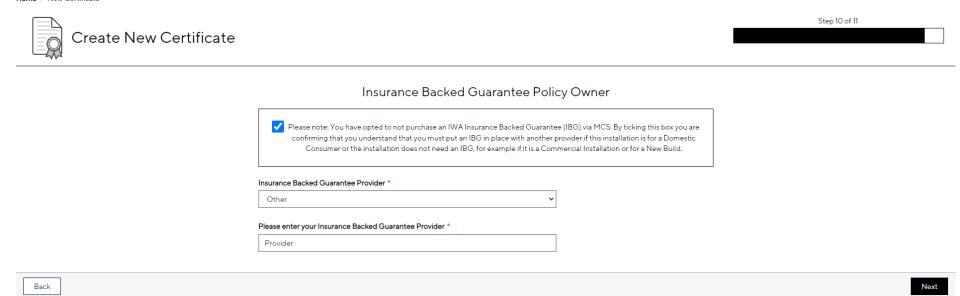


If the IBG provider you are raising the policy with is not in the drop-down menu, you can select 'other' and a free text field will appear where you can enter the name of the IBG provider:



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

Home / New Certificate



1.1.10 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 to choose from:

- 1) Select 'Pay with PayPal' to pay for the certificate/IBG immediately, OR
- 2) Add the certificate/IBG to the basket, to be purchased at a later time, perhaps with other certificates



Create New Certificate

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

Step 9 of 9

Add to basket 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

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Both processes are outlined in the following two sections.

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

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.

Step 9 of 9



Create New Certificate

 Item Name
 Cost (ex VAT)
 Cost (inc VAT)

 MCS Certificate
 £30.00
 £30.00

 Insurance Backed Guarantee Provided by IWA - 2 year Insurance Backed Guarantee
 £15.00
 £15.00

 Total
 £45.00
 £51.00

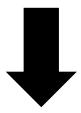
Please click this button if you would like to add this certificate to your Installer's basket for payment at a later date.

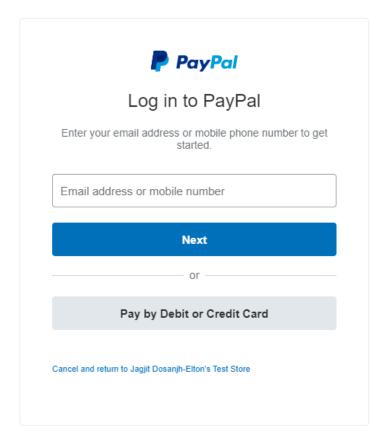
The certificate will not be complete and and cannot be downloaded until payment is made from the basket screen.

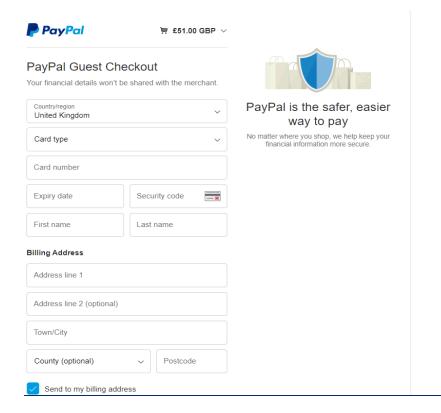
Or, click this button to pay for this certificate now viaPayPal:

Pay with PayPal

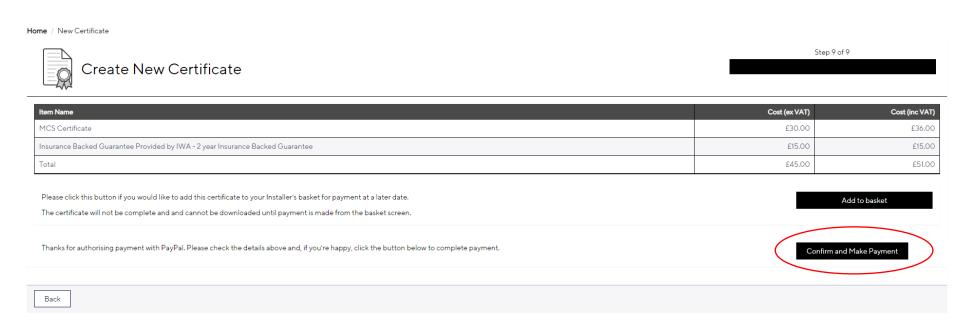
Back



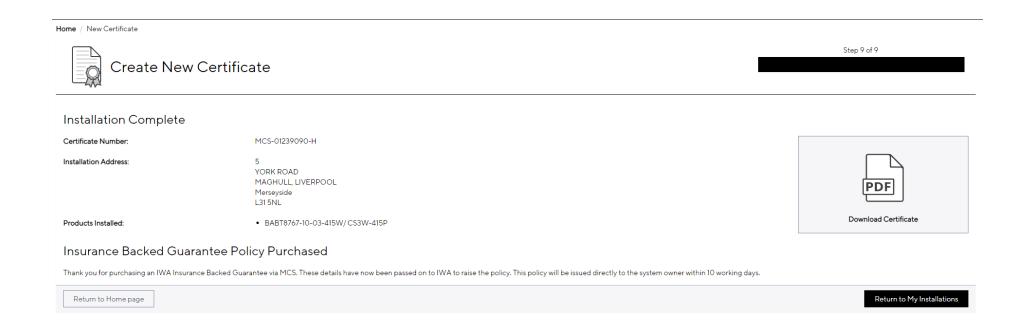




Once the payment has been processed via PayPal, the contractor will be redirected back to the MID and a box will appear stating 'confirm and make payment'. By clicking this, the contractor is confirming that the payment is complete and that the amount has been charged to their chosen card.



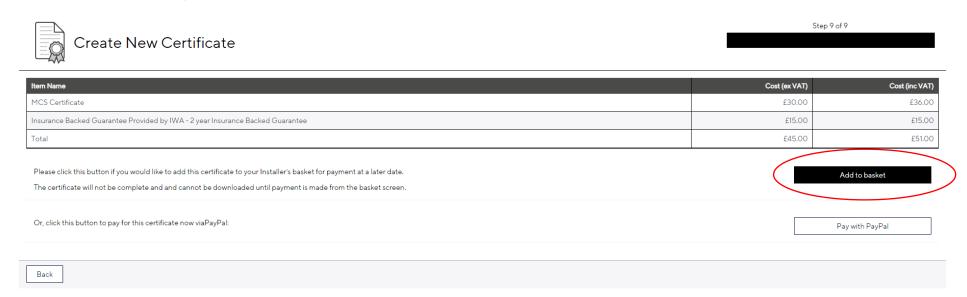
Upon selecting the 'confirm and make payment' button, the certificate will be available to download and a copy should be sent to the system owner (if the contractor has not requested the MID send the certificate automatically).



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, 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):



Basket for Installer (Tims Friendly Installation Company)

Purchase selected					Select all Un-select all	Remove selected
Please Select	Edit Certificate	Technology Type	Created Date	Address	Postcode	Total Spend
✓	Edit	Air Source Heat Pump	17/03/2021 13:15	36	L31 5NL	£76.00
					Total (inc: VAT)	£76.00

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 certificate's status 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):

Home / Basket



Basket for Installer (Tims Friendly Installation Company)

Purchase selected					Select all Un-select all	Remove selected
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	Biomass	17/03/2021 13:21	66	L31 5NN	£116.00
✓	Edit	Solar Thermal	17/03/2021 13:31	3	L31 5NL	£66.00
					Total (inc: VAT)	£339.00

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 (Tims Friendly Installation Company)

Item Name	Postcode	Address	Cost (ex VAT)	Cost (inc VAT)
MCS Certificate	L31 5NL	1	£30.00	£36.00
Insurance Backed Guarantee Provided by IWA - 2 year Insurance Backed Guarantee	L31 5NL	1	£15.00	£15.00
Total			£45.00	£51.00

Please click the button to authorise payment using PayPal:



Cancel

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



Basket Payment (Tims Friendly Installation Company)

Item Name	Postcode	Address	Cost (ex VAT)	Cost (inc VAT)
MCS Certificate	L31 5NL	1	£30.00	£36.00
Insurance Backed Guarantee Provided by IWA - 2 year Insurance Backed Guarantee	L31 5NL	1	£15.00	£15.00
Total			£45.00	£51.00

Thanks for authorising payment 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.

Home / Basket



Basket for Installer (Tims Friendly Installation Company)

You have no certificates ready to purchase.

Note: Again, like the Pay as You Go method outlined in section 4.1, 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.

2. What to Do If There Is a Problem?

If you have difficulty resolving an issue with the certificate creation section or require any more information about the MCS/IWA product range, please contact the MCS Helpdesk team either via email: mcshelpdesk@mcscertified.com, or telephone: 0333 103 8130.

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	First Issue	4/12/2020
	Operations Team		
1.1	Approved by MCS	Installer Basket	6/4/2021
	Operations Team	Amendments	
1.2	Approved by MCS	RHI closure and MIS3005	1/4/2022
	Operations Team	split related amendments	