Generating Additional Stage(s) to an Existing Project

Scotland

Home Screen

- Expand the 'Certifier Actions' bar then expand the 'Certificates' bar

- Select 'Generate Additional Stage(s) to an Existing Project' from the menu

Application Actions	+
Account Actions	+
Certifier Actions	−

| Management | + |
| Certificates | − |

View Certificate Summary Report ▶

View Certificate Status Report ▶

Generate New Certificate ▶

Generate Additional Stage(s) to an Existing Project ▶

Generate Amendment to Warrant ▶

Generate Structural Change to Certificate Issued to Local Authority (Warrant Not Yet Granted) ▶

Convert Non-Staged Project to Staged Project ▶

View Schedule Information ▶

| CPD | + |

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Initial Steps

Once you have confirmed that you have adequate Professional Indemnity Insurance you will be presented with an overview screen, containing this tutorial.

Next you will be presented with a list of all your certificates that you can generate an additional stage for. The filters can be used to search if there are too many certificates to easily find the one you require. If the certificate you need to amend is not present it may need to be converted to a staged certificate. Return to the 'Certificate Actions' screen and proceed with the 'Convert Non-staged Project to Staged Project' action.

Select the correct certificate and continue.

Select Certificate

ACC: SER1-D-00000

Filters

Certificate number

Project location

Project reference

[Apply Filters]

[Hide / Show Columns ▶]

Certificate Number	Project Reference	Project Title	Project Location	Project Risk Group
○ 000000	000000	Project Title	Project Location	-
○ 000000	000000	Project Title	Project Location	-
○ 000000	000000	Project Title	Project Location	-

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General Project Information

You will then enter your project information as outlined below:

- Project reference number

- Warrant number

- Project title

- Project location

- Project description - this should include descriptions of any New Build, Alteration and Conversion elements to the project

- Project risk group

- Does the project contain conversion work? Please note : there is no longer a requirement to generate a separate conversion certificate

- Local Authority

- Body registration number – Please note: this cannot be changed from the previous certificate

- Total project value – Please note: for staged projects this should be the estimated total value for the entire project rather than just the current stage(s)

Select 'Save and Continue' to progress to the next step

Project reference *

Project reference

Warrant number

Warrant number

Project title *

Project title

Project location *

Project location

Project description *

Project description

You have *1892* characters left

Project risk group *

Please select

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Stage Information

You will then be presented with the screen to the right. In this example, two previous stages have been generated for the project. All existing stages will be pre-populated in this section. The new certificate will cover all stages up to the point of creation, so unlike in the old SER system where there were separate certificates for each stage, in the new system this new certificate will cover stages 1-3. You are able to edit or delete any previous stages, plus add as many additional stages as required.

You will then proceed through each Schedule as normal. Please note that as each new stage covers the entire project up to that point, all Schedules should be cumulative rather than applying to a single stage.

Important note: if generating an additional stage to a project for which more than one previous stage was generated using the pre-October 2016 SER system, the process differs to the above. Instructions for this can be found in the next slide of this tutorial.

Legacy Stages

If you are creating an additional stage to a project for which more than one stage was generated using the pre-October 2016 SER system, you will see the screen to the right. Note how stage 1 is missing. This is because only the most recently generated stage will be showing.

In the example shown to the right, you will need to delete all the stages that are displayed, and enter details for all stages for the project up to this point. Following this process will preserve the link to previous certificates but will ensure that the current certificate covers all the stages of the project that are applicable.

You will then proceed through each Schedule as normal. Please note that as each new stage covers the entire project up to that point, all Schedules should be cumulative rather than applying to a single stage.

Stage Information

ACC: SER1-D-00000

2

Stage type **SER**

Stage description *
Stage 2 comprises the full works to completion.

Edit

Delete

3

Stage type *   ○ SER   ○ Non-SER

Stage description *

You have *2000* characters left

Add New Stage

Do you expect this to be the last stage(s) for the project?
○ Yes   ◉ No

Save and Continue
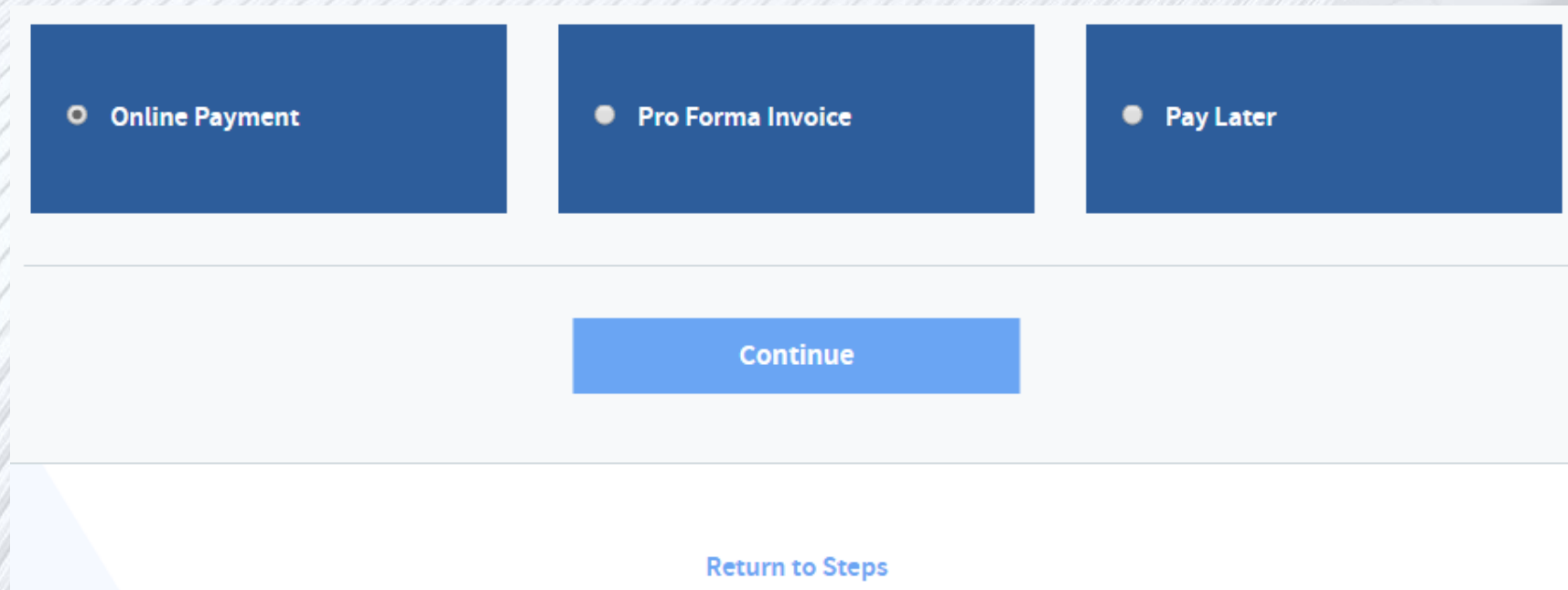
◄ Previous Step   Return to Account

Complete Payment

In the payment section you will be presented with the screen to the right.

- Online Payment – secure payment using Credit/Debit card

- Pro Forma Invoice – this is if you want to pay by cheque; you will be able to select the billing address

- Pay Later – this saves all actions up to this section and returns you to your account home page. Note: the certificate isn't complete using this selection. The certificate will only be completed once payment has been received.

Upon completion of the certificate you will be sent a receipt of your payment. You will also be emailed a PDF copy of the certificate for printing and signing. This can be accessed again from the 'Certificate Information' page.