

# Convert Non-staged Project to Staged Project

Scotland

# Certificate Actions

You are now able to convert a non-staged project into a staged project without needing to contact SER. The cost of the staged certificate will be the minimum certificate fee unless the project value has increased significantly.

By expanding the 'Certificates' section under 'Certifier Actions' you will be presented with the options shown to the right.

Select 'Convert Non-staged Project to Staged Project'.

The screenshot displays a web application interface with a dark blue header and a light blue main content area. The header contains three expandable sections: 'Application Actions' (+), 'Account Actions' (+), and 'Certifier Actions' (-). The 'Certifier Actions' section is expanded, showing a sub-section 'Certificates' (-). Below 'Certificates', there is a list of actions, each with a right-pointing arrow: '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', and 'View Schedule Information'. At the bottom of the interface, there is a 'CPD' section (+).

# Select Certificate

Once you have confirmed that you have adequate Professional Indemnity Insurance you will be presented with the screen to the right. The 'Filters' section will not be expanded as default. The certificates will be ordered from newest to oldest. You can also search using project reference, certificate number and project location.

Once you have located the relevant certificate, select it and then click 'Confirm Selection and Continue' at the bottom right of the screen.

## 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
<input type="radio"/> 000000	000000	Project Title	Project Location	-
<input type="radio"/> 000000	000000	Project Title	Project Location	-
<input type="radio"/> 000000	000000	Project Title	Project Location	-

# General Project Information

This will bring up the 'General Project Information' screen which will be pre-populated with the information entered for the previous certificate. Any of the below that need amending can be changed here before continuing:

- 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)

**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

# Stage Information

Next you will enter the stage information. You can edit, delete and add stages to the certificate as required. Once completed select 'Save and Continue'.

You will then be presented with each Schedule as when generating the previous certificate, and may make any changes as required.

Once all sections are amended as appropriate you may proceed to payment.

## Stage Information

ACC: SER1-D-00000

**1**

Stage type \*  SER  Non-SER

Stage description \*

*You have 2000 characters left*

[Save This Stage](#)

Do you expect this to be the last stage(s) for the project?

Yes  No

[Save and Continue](#)

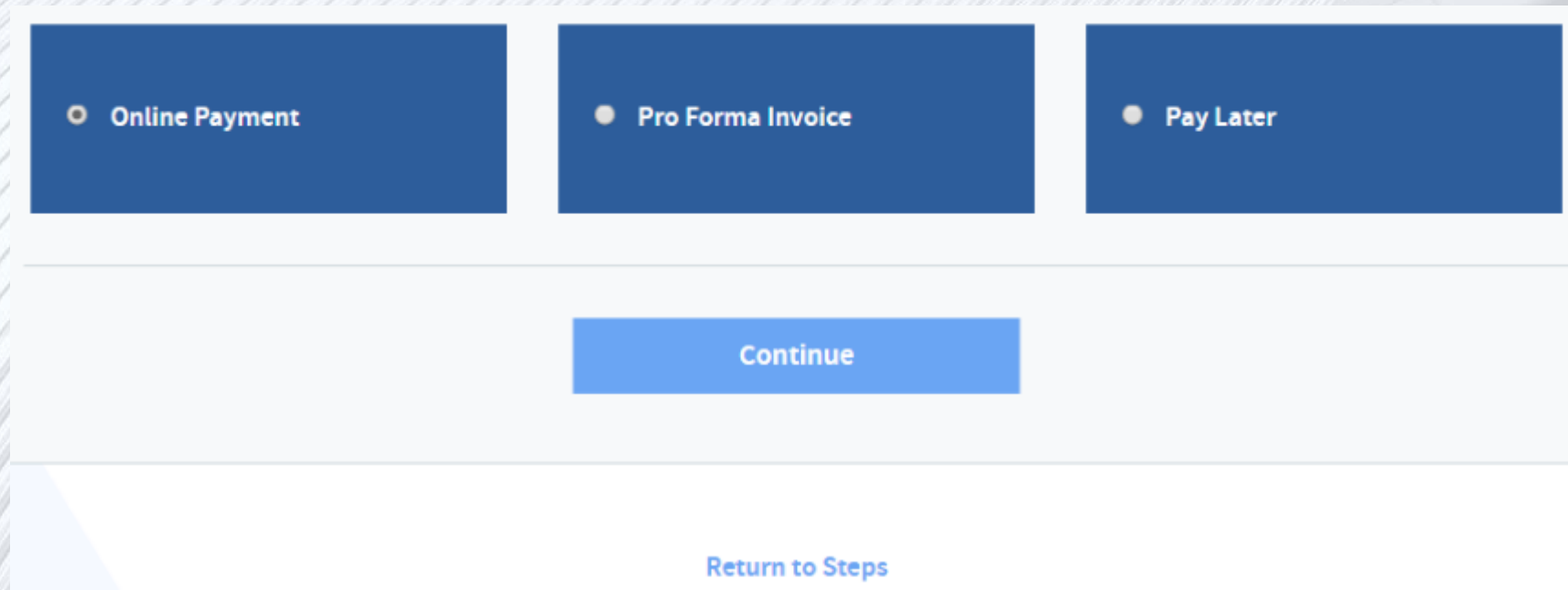
[← Previous Step](#) [Return to Account](#)

# 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.



The screenshot shows a payment selection interface with three radio button options: 'Online Payment', 'Pro Forma Invoice', and 'Pay Later'. The 'Online Payment' option is selected. Below the options is a 'Continue' button, and at the bottom is a 'Return to Steps' link.

<input checked="" type="radio"/> Online Payment	<input type="radio"/> Pro Forma Invoice	<input type="radio"/> Pay Later
<a href="#">Continue</a>		
<a href="#">Return to Steps</a>		