

Generating a New Certificate Staged Projects

Scotland

Home Screen

- Expand the 'Certifier Actions' bar followed by the 'Certificates' bar
- Select 'Generate New Certificate' from the menu

The screenshot displays a vertical navigation menu with the following items:

- Application Actions +
- Account Actions +
- Certifier Actions -
- Management +
- Certificates -

The 'Certificates' section is expanded, showing the following options:

- 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 ▶

At the bottom of the menu is the CPD section with a plus sign (+).

Certificate Generation

- The first step is to confirm that your firm has adequate Professional Indemnity Insurance. Select the correct option and click 'Continue'
- Next you will be asked to select whether the project is staged or non-staged. Select 'Staged project' and click 'Continue'
- The next option is to select the type of building that this project relates to. Select the relevant option and click 'Continue'

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: when you enter the body number and search, you must click ‘Confirm’ to continue
- 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 *

Warrant number


Project title *

Project location *

Project description *

You have 1892 characters left

Project risk group *

Stage Information

This section allows you to input the information for the stage or stages you are certifying in this initial certificate. You can also enter non-SER stages such as demolition and drainage so that the stages on the SER certificate can match those in the warrant application.

Enter the stage description into the box, select whether the stage is SER or Non-SER and select 'Save This Stage'. Repeat this step until you have entered all the stages required.

Select the correct response to 'Do you expect this to be the last stage(s) for the project?' and click 'Save and Continue'.

When you certify further stages for this project, you will add the information for those stages to this page.

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](#)

Schedule 1

Once you have completed the General Project Information you will be presented with the Schedules. Schedule 1 relates to third party designed elements. The elements available will depend on the Risk Group selected in the previous step. The Schedule 1 shown to the right is for an RG1A & B group. Please see SER Guidance Note 12 or the tutorial relating to Schedule 1 for further information.

Please note: there will no longer be an 'Other' option on Schedule 1.

Select any applicable items and click 'Save and Continue'

You may return to the previous step if required.

Schedule 1 - Third party designed details

ACC: SER1-D-00000

Please note - **ALL** items entered on Schedule 1 must also be included on Schedule 2

Please select the items that form part of the structural design covered by this certificate and are subject to detailed design by a specialist contractor which have yet to be completed.

- Piling
- Vibro stone columns
- Precast foundation systems
- Precast concrete floor units
- Precast concrete stairs
- Timber roof trusses
- Steelwork connections
- Pedestrian barriers
- Glazing

Save and Continue

[◀ Previous Step](#)

Schedule 2 – Design Features

Schedule 2 is where you enter the design features, which type of Certification option was used and the competency declarations. There are a number of sections under each heading. We recommend you view each heading but it is not mandatory.

Certification Options

- Certifier was Designer, checked by others
- Certifier was Checker, structure designed by others
- Certifier made independent assessment
- Certifier used competence of identified third party
- Certifier was Designer and Checker

Competency Declarations

- Basic Knowledge
- Design Knowledge
- Some Design Knowledge
- Major Design Knowledge
- Specialist

Schedule 2 - Design features

ACC: SER1-D-00000

General Design Overview ▶

Not Viewed ✕ No design feature(s) selected ✕

Substructures ▶

Not Viewed ✕ No design feature(s) selected ✕

Ground Improvement ▶

Not Viewed ✕ No design feature(s) selected ✕

Superstructure ▶

Not Viewed ✕ No design feature(s) selected ✕

Building Envelope ▶

Not Viewed ✕ No design feature(s) selected ✕

Secondary Structure ▶

Not Viewed ✕ No design feature(s) selected ✕

Other Structure ▶

Not Viewed ✕ No design feature(s) selected ✕

Save and Continue

◀ Previous Step

Return to Account

List of Information Used for the Purposes of Certification

This new section allows you to add a list of drawings, specifications and documentation used during the certification process. This Schedule is mandatory for all certificates, and will be issued to the Local Authority with the certificate.

You can add the items individually or upload a document containing a list of the items.

List of information used for the purposes of certification

ACC: SER1-D-00000

Please use either of the methods below to complete a list of the information used for the certification of this project

Manually Add a List

Add Item

Title *	<input type="text"/>
Number	<input type="text"/>

[Add Item](#)

Upload a File Containing a List

Select a file No file chosen [?](#)

[Save and Continue](#)

[← Previous Step](#)

[Return to Account](#)

Items to be Certified in a Later Stage

Next you will be presented with a section entitled 'Items to be certified in a later stage'.

Here you can list the further stages to be certified for this project in future certificates. You can include both SER and non-SER certified stages.

This section should be left blank if there are no more stages to add to the project.

When you generate further certificates for this project you will move stages from this page to the Stage Information Page.

Items to be certified in a later stage

ACC: SER1-D-000000

Leave this section blank if this is a non-staged certificate

Please provide a description of any items that will be covered by future design certificates

You have 2000 characters left

Save and Continue

Confirm Certificate

On this screen you will be able to expand any of the sections shown to the right. You will also be able to view a PDF draft of the certificate.

If you notice any errors you can return to the previous step using the 'Previous Step' button at the bottom left of the screen. Continue pressing this until you reach the step that requires amending. Change any details required and proceed back through the steps to the 'Confirm Certificate' screen.

Select the correct answer for 'Do you expect this to be the last certificate for this project?'. Selecting 'Yes' will not prevent you from creating an amendment in the future or adding additional stages should they become necessary. This is a function added for accuracy in our records and reporting processes.


Once you have made any required corrections, select 'Confirm Certificate'.

Confirm Certificate

ACC: SER1-D-00000

Please ensure that you have reviewed all sections and viewed the draft certificate before continuing

- General Project Information +
- Schedule 1 - Third Party Designed Details +
- Schedule 2 - Design Features +
- List of Information Used +
- Items to be Certified in a Later Stage +

 [View Draft Certificate](#) ▶

Do you expect this to be the last certificate for this project? *

Yes No

[Confirm Certificate](#)

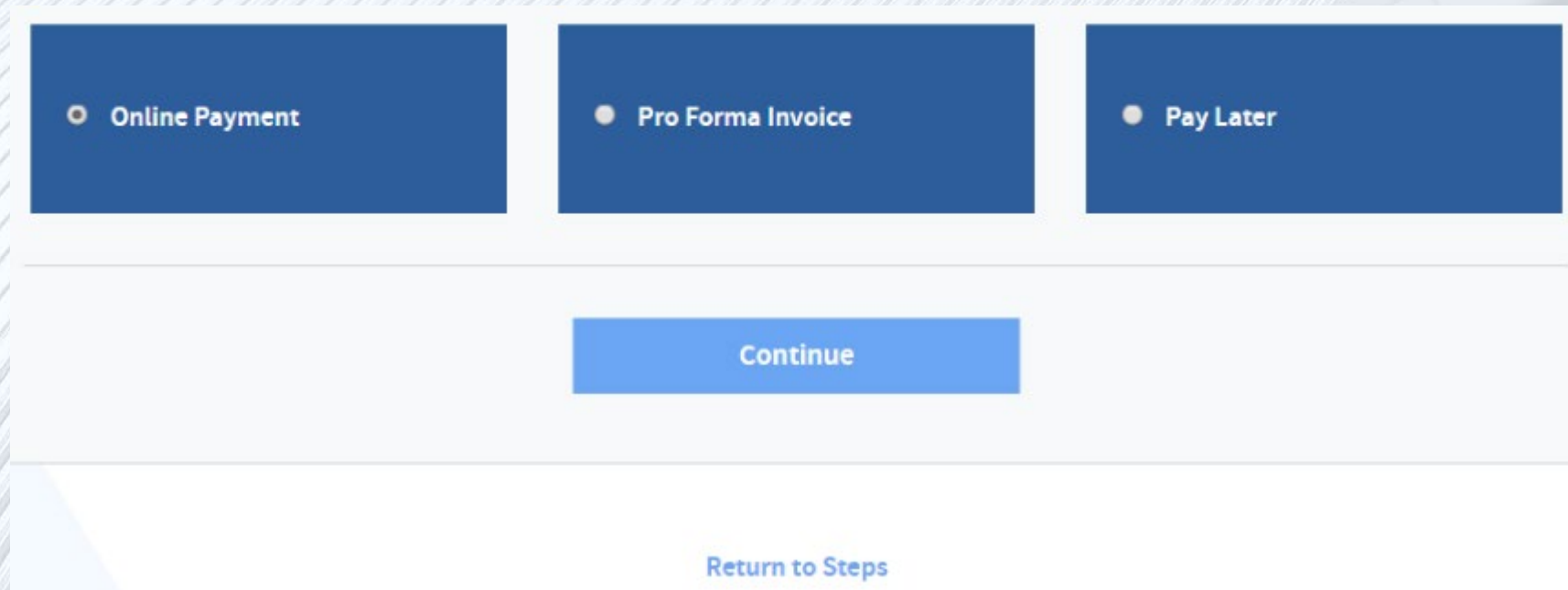
[◀ Previous Step](#) [Return to Account](#)

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 a 'Return to Steps' link.

<input checked="" type="radio"/> Online Payment	<input type="radio"/> Pro Forma Invoice	<input type="radio"/> Pay Later
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[Continue](#)

[Return to Steps](#)

Certificate Information

Once payment is complete the certificate is confirmed and you will be taken to the 'Certificate Information' screen shown to the right.

Expanding the 'Certificate Actions' screen will give you the below options:

- View Certificate PDF – you can download and save the PDF certificate
- View Certificate History – a history of the actions of this certificate, useful for multiple stages and amendments
- Enter Certificate Signature Dates
- Mark Certificate As Not Proceeded With
- Generate Form Q – this will be done through the SER website now, refer to the Form Q tutorials
- View Form Q History – view all previously generated Form Qs, refer to Form Q tutorials for more information.

Expanding the Certificate Details sections will show you the information entered during certificate generation.

Certificate Information

CRT: 000000

Certificate Status: Payment Complete (Awaiting Signature Dates)

Certificate Summary

Project reference	Project Reference
Certifier	SER1-D-00000 Title Certifier Name
Body	SER1-DB-0000 Firm Name

Certificate Actions

+

Certificate Details

- General Project Information +
- Schedule 1 - Third Party Designed Details +
- Schedule 2 - Design Features +
- List of Information Used for the Purposes of Certification +
- Items to be Certified in a Later Stage +
- Additional Information +

[Return to Account](#)