

# LCEA guidance notes for the DCLG AirCon Report Software

The following guide has been prepared for all CIBSE fully registered Air Conditioning Inspectors to assist them in the preparation, production and lodgement of Air Conditioning Inspection Reports (ACIRs) utilising DCLGs AirCon Report Software.

By the end of this guide, you will know how to use the software, produce reports, lodge them through the lodgement portal and retrieve the reports from the Landmark register.

The lodgement of ACIRs has been a mandatory requirement since April 2012. Only a lodged report, stored on the Landmark register, is considered to be a valid report with which your client will comply with the legislation.



All CIBSE Certification fully registered Air Conditioning Inspectors can download and install the new DCLG AirCon Report Software.

This section will guide you through the process of downloading and installing your Landmark digital certificate which will allow you to access the "Authorisde Users" area of the register's webiste, and also how to download and install the DCLG AirCon Report Software on your PC.

## Downloading and installing Landmark digital certificate

Downloading and installing the digital certificate for Landmark is a simple and straightforward process, as follows:

- 1. Login to the CIBSE Certification lodgement portal <u>https://lodgement.cibsecertification.co.uk</u> using the details given to you in your 'registration' email
- 2. Once logged in, please click on the "Downloads" tab
- 3. In this tab assessors can download the zip file which contains the digital certificates and passwords. They can also download the guide describing the installation procedure. Download the zip file on your PC and note the location were the zip file is saved.

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	CERTIFICATION LODGEMENT PORTAL	
Cases QA Addres	s Management Reports Admin Admin : Pavlos	Konstantinidis 🗸
Downloads		
Title	Description	Download
Lodgement Quick Start Guide	LCEA guidance notes for website.	DOWNLOAD
QA Quick Start Guide	A manual for LCEAs that provides instructions for CIBSE's QA process.	DOWNLOAD
Registry (Landmark) Digital Certificate	The current Landmark digital certificates for England and Wales and Northern Ireland are available below. The certificates provide access to otherwise restricted areas of the Landmark Register. The download is a zip file of a folder containing the certificates and a text file containing the certificate passwords.	DOWNLOAD
Guide to Installing Registry (Landmark) Digital Certificate	LCEA guidance notes on downloading and installing the Landmark Digital Certificate.	DOWNLOAD
Current Central Information Point (CIP)	CIP: The latest version of the Central Information Point (CIP). The CIP holds information used by the Operational Rating calculation software and the Advisory Report generation software.	DOWNLOAD
LCEA Marketing Toolkit		DOWNLOAD
ACI's Marketing Toolkit		DOWNLOAD
LCC Marketing Toolkit		DOWNLOAD
CIBSE Energy Assessors		DOWNLOAD

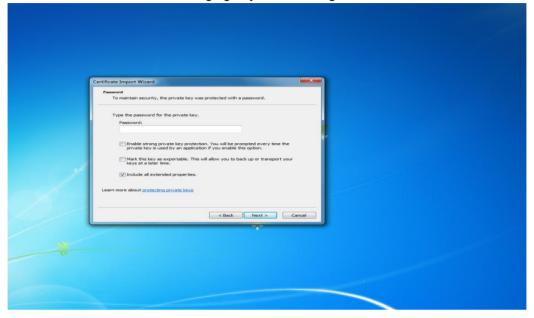
- 4. After the download is complete, please go to the folder were the zip file was saved.
- 5. Double-click on the zip file to access it and you should see that this contains:
  - A digital certificate (CIBSE\_V2\_ND\_EW\_MEM\_LIVE.p12) for the register for Non-Domestic properties in England and Wales <u>https://www.ndepcregister.com/</u>
  - A digital certificate (CIBSE\_ND\_NI\_MEM\_LIVE.p12) for the register for properties in N.Ireland <u>https://www.epbniregisternd.com</u>
  - A text file containing the passwords for the two certificates mentioned above
- 6. Double-click on the certificate you need to install and a certificate import window will pop-up.

An Characteristic State Sta	Certificate Import Wizard		
	<i></i>	Wized Manual balance on a converting tase, contribute the use construction as the second on the second on the second on a contribute, which is tasked by a certification authority, is a contribute, second on your identify and contrains information converting tasks and the second on the second on the second contribute on the second on the se	

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7. Please click on 'Next' without changing any of the settings until you reach the page where the password is required. Copy the password for this certificate from the text file and paste it in this field. Click on "Next" without changing any of the settings



8. Click on 'Finish' to complete the installation and you should get the message below:

Certificate Import Wizard
ок

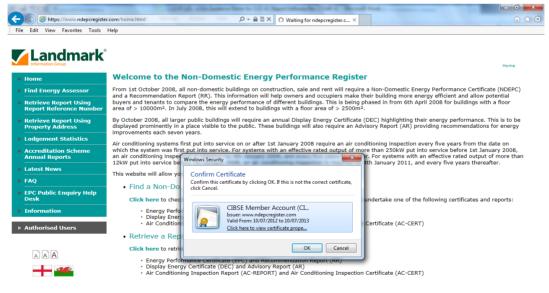
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9. You have now successfully imported your digital certificate for Landmark. You can check this in your Internet Explorer from Tools->Internet Options->Content->Certificates.

Tatama	t Options 8 X	2.3. Salary Sea & S. J. K. Spir (Aug. 6) [44.2] March 54	
		P - C 🐰 Google ×	6 🕁 🛱
Gene	ral Security Privacy Content Connections Programs Advanced		
- I I	tificatesUse certificates for encrypted connections and identification.	imail Drive Calendar More+	
	Clear SSL state Certificates Publishers		SIGN IN
	oComplete	Certificates	
	AutoComplete stores previous entries Settings on webpages and suggests matches for you.	Intended purpose: <a>All&gt;</a>	
Fee	ds and Web Slices	Personal Other People Intermediate Certification Authorities Trusted Root Certification	
	Content from websites that can be content from websites that can be read in Internet Explorer and other programs.	Issued To Issued By Expiration Date CIBSE Member Account (CIBSE www.epknregisternd.com 02/07/2013 CIBSE Member Account (CIBSE www.ndepregister.com 10/07/2013	
		/ · · · · · · · · · · · · · · · · · · ·	
	OK Cancel Apply	Certificate intended purposes <al></al>	
		CAU> View	
		Learn more about certificates Close	

10. You can now access the 'Authorised Users' area in Landmark (<u>https://www.ndepcregister.com</u>). Click on the "Authorised Users" option on the left side of the webpage, a window will pop-up for you to select the digital certificate. Please select your certificate and click 'OK'. Accept the terms and conditons for full access to the "Authorised Users" area.



#### Accessibility | Site Map | Information | Site Policy

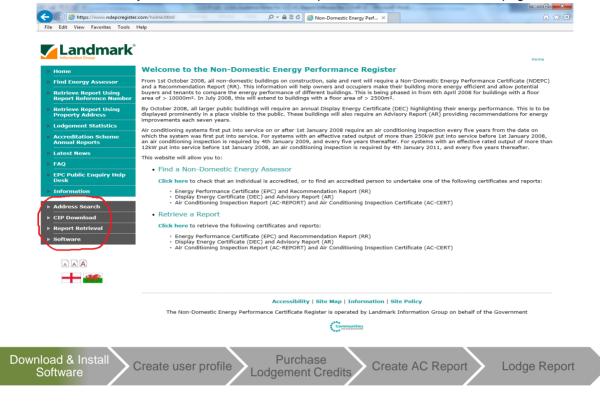
The Non-Domestic Energy Performance Certificate Register is operated by Landmark Information Group on behalf of the Government

Communities

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11. Please note that you now have four additional option on the left side of the webpage.



# How do I download and install the DCLG AirCon Report Software?

- 1. Please go to the Landmark webiste (<u>https://www.ndepcregister.com/</u>) and access the "Authorised Users" area, as explained above.
- 2. Please click on "Software" and in insert your LCEA number in the field next to 'Accreditation Number'. Please ensure that you use your full registration number (6 digits), eg. LCEA123456.

	8 Homa >> Software
lome	Software
ind Energy Assessor	You must enter your Assessor ID to download the files available from this page:
letrieve Report Using leport Reference Number	Accreditation Number LCEA123456 ×
tetrieve Report Using Property Address	Software Name Version Software User Documentation ORCalc 3.6.2 Download Download
odgement Statistics	DCLG AC Software 2.0.6 Download Download
Accreditation Scheme Annual Reports	Energy Assessors are reminded that all software queries are to be directed to their respective Accreditation Scheme and not to the operator of the Non Domestic EPC Register.
atest News	Domestic EPC Register.
FAQ	
EPC Public Enquiry Help Desk	
Information	Accessibility   Site Map   Information   Site Policy
Address Search	The Non-Domestic Energy Performance Certificate Register is operated by Landmark Information Group on behalf of the Government
CIP Download	Communities
Report Retrieval	
Software	
	-
A A A	

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- Please click on 'Download' for DCLG AirCon Software v2.0.6 (correct version at the time ) and save the zip file on your computer, please note the location where this is saved.
   NB. The version will change when there is an update, the most up to date version will always be on Landmark.
- 4. Please go to the location where the .zip file was saved, right-click on the file and select "Extract All". Follow the Windows ZIP assistant to extract the DCLG AirCon Report Software installation files to your desired location.

	×
🕞 🚹 Extract Compressed (Zipped) Folders	
Select a Destination and Extract Files	
Files will be extracted to this folder:	
C:\Users\Admin\Downloads\AC Software\LIVE_ACReport_v2.0.5 Brow	/se
Show extracted files when complete	
Extract	Cancel
Extract	Cancer

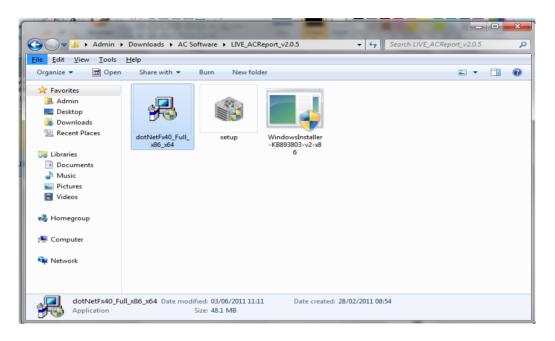
5. Go to the folder where the extracted DCLG AirCon Report Software files were saved to start the installation process.

Q → Admin + [	Downloads 🕨 AC Softw	vare ►	-	-	✓ 4y Search AC Softward		× P
Organize 👻 🔚 Open	Include in library 🔻	Share with 🔻	Burn	New folder		•	0
<ul> <li>Favorites</li> <li>Admin</li> <li>Desktop</li> <li>Downloads</li> <li>Recent Places</li> <li>Libraries</li> <li>Documents</li> <li>Music</li> <li>Pictures</li> <li>Videos</li> <li>Homegroup</li> <li>Computer</li> <li>Network</li> </ul>	LIVE_ACReport_v 2.0.5	WE_ACReport_v 2.0.5					
LIVE_ACReport_v. File folder	2.0.5 Date modified: 03	8/06/2011 11:11					

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- 6. The DCLG AirCon Report Software comes with two installation files:
- Microsoft .NET (dotNetFx40\_Full\_x86\_x64)
- "Setup" (AirCon Report Software installation package)



- 7. Double click on Microsoft .NET (dotNetFx40\_Full\_x86\_x64) to install this software. The DCLG AirCon installer will fail to initialise, if this step is missed.
- 8. Once .NET has been installed, double click on the DCLG AirCon installer (Setup) and follow the steps on screen.
- Once the DCLG AirCon Software has been installed, click on the Start Menu > Program Files > DCLG AirCon Software > Start DCLG AirCon Software to start the AC software for the first time.

You have now completed the DCLG's AirCon Report Software Installation. If the process was completed successfully, you should be able to see the new software under your programs in the start menu.



#### Creating an assessor profile for use with the DCLG AirCon Software

To successfully complete this step:

- You will need your lodgment portal username and password to login to the website
- You will need to have the lodgement portal profile page open in your web browser

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1. Go to Start > Program Files and open the DCLG AirCon Report Software, the following "Main" screen will be displayed.

ReportManager		۲
		~
Create	Delete	View Assessor Manager
View Report	View Certificate	Generate Final Report
View Report	view certificate	Conclute Financepore
	About	

2. On the main screen, click on Assessor Manager to create your assessor profile

	Assessor Manager		$\bigotimes$	
			*	
			-	
	Create	Delete		
				J
owr	nload & Install Create	e user profile	Purcl eme	hase nt Credits Create AC Report Lodge Report

3. Fill in your Assessor Details. Please note that these MUST be copied and pasted from your profile on the lodgment portal website as they are case sensitive!

In order to complete this step, you will need to be logged into the lodgment portal.

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Air Conditioning Inspector

Assessor Details	Certificate Number: Your LCEA Number
Assessor	in the correct format. LCEA (4 Letters)
Certificate Number:	followed by 6 Digits. Eg: LCEA123456, or LCEA001234, or LCEA000123.
Name:	<b>Name</b> : Your name, middle names and
Accreditation Scheme Name:	<ul> <li>surnames as they appear on the lodgment portal website.</li> </ul>
Website Address:	Accreditation Scheme Name: CIBSE
Trading Address:	Certification Ltd
	Website Address:
Company Name:	www.yourcompany.com
Qualifications	Trading Address: Your work address as it
	appears on the lodgment portal, without
Delet	commas.
	<b>Company Name</b> : Your company name as
Email:	it appears on the lodgment portal Qualifications: These can be Level 3,
Telephone Number:	Level 4 or both depending on your level of
Activation Code:	certification. Please click on "Add" and
	select SP3 for Level 3, CC4 for Level 4 or
Insurance Details	add both for Level 3 & 4 accrediation.
	Email: Your work email address as it
Insurer	appears on the lodgment portal
Policy Number	Telephone Number: Your work telephone
Effective Date 03/06/2011	number as it appears on the lodgment
Expiry Date 03/06/2011 15	portal. Activation code: This is not needed in the
Professional Indemnity Limit 0	latest software version, please leave the
	field blank (no spaces or -)
	Insurer: Your PII policy insurer as it
Save Validate Cancel	appears on the lodgment portal.
	<b>Policy Number</b> : The policy number as it
	appears on the lodgment portal.

Effective and expiry dates as they appear on the lodgment portal. Indemnity limit as it appears on the lodgment portal, minus the  $\pounds$  symbol and the decimals.

When all the details on the above screen match the information on the lodgment portal website click on Validate, and then Save to exit to the main screen.

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If the process was completed successfully, your name will be displayed in the Assessor Manager area.



# Logging in to the lodgement portal

The CIBSE Certification lodgement portal website allows all fully registered CIBSE Energy Assessors to:

- Log in to the secure personal assessor's area to retrieve their profile and insurance details
- Open lodgement cases to search for address details and UPRN numbers
- Access the Address Management area to request a new address or to add an additional line of information to an existing address
- Lodge their reports by uploading xml files to the register in order to provide valid reports/certificates to their clients

You will be able to log in to the lodgment portal when you are fully registered, CIBSE Certification will email your portal login details to your work email address. If you are unsure of your login details, please email <u>epc@cibsecertification.org</u> quoting your LCEA number in the subject.

To access the lodgement portal login area, please go to <u>https://lodgement.cibsecertification.co.uk</u> and enter your username and password in the login area located at the top right corner of the website.



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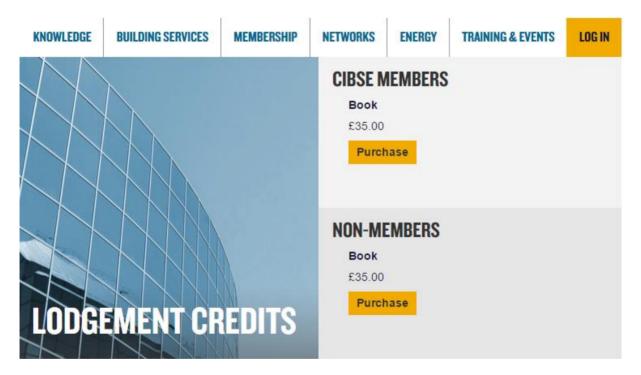
# 1. Air Conditioning lodgement credits

To lodge ACIRs with Landmark, you will need to purchase lodgement credits from CIBSE.

Lodgement credits cost £35 + VAT each but discounts are available for purchasing bulk numbers of credits.

Lodgement credits can be bought online via the main CIBSE website. Please follow the steps below to purchase your lodgement credits online.

- 1. Visit the CIBSE portal at <u>www.cibse.org</u> and log in with your username and password (same for all CIBSE websites).
- 2. Then in the "Store" area you can pay for credits online or
- 3. Purchase your credits by phone on +44 (0)20 8772 3681.



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#### Creating your first AC report with the DCLG AirCon Report Software

To successfully complete this step:

- You will need your lodgement portal username and password to login to lodgement portal website
- You will need to have the lodgement portal CASE page open in your web browser
- You will need to know the property postcode and address.

At the end of this step you will have created your first AC Inspection case and you will be ready to enter the AC inspection data in the new DCLG AirCon Report Software.

1. Go to Start > Program Files and open the DCLG AirCon Software, the following "Main" screen will be displayed.

ReportManager		<b>⊗</b>
Create	Delete	View Assessor Manager
View Report	View Certificate	Generate Final Report
	About	

2. Click on "Create" on the Report Manager "Main Screen"

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## Filling in the Report Details area

3. The Report screen will open, click on Report Information to expand the section and then on Report Details to start your first report.

Report				
File Report				
Report Information	Report Details			
Report Details Site Details Assessor Details Calculation Details	Inspection Report RRN			
<ul> <li>Inspection Report</li> </ul>	Certificate RRN Issue Date	14/06/2011	15	
<ul> <li>Inspection Certificate</li> </ul>	Valid Until Date	14/06/2016	15	
Additional Data Manager	Inspection Date	14/06/2011	15	
	Registration Date	14/06/2011	15	
	AC Inspection Level	Level3	~	
	Language	English	~	

- 4. Initially, the "Inspection Report RRN" and the "Certificate RRN" fields will be greyed out. These fields are automatically generated by the software and cannot be altered by the AC Inspector.
- 5. Enter the "Issue date" and "Valid Until Date" for the AC inspection report,
- 6. Enter the "Inspection Date" and the "Registration Date".
- 7. Please follow these logic rules when entering dates:
  - a. The issue date cannot be in the future
  - b. The inspection date cannot be in the future when matched against the issue date and it can not be more than 100 days in the past from the day the report is lodged.
  - c. The registration date must be after the inspection date or on the same day
- 8. Select the AC inspection level for this report (Level 3 Simple / Level 4 Complex)
- 9. Select the language of the report, English or Welsh.
- 10. Click on Site Details to move on to the next subsection.

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#### Filling in the Site Details area

To successfully complete this step:

- You will need your lodgement portal username and password to login to lodgement portal website
- You will need to have the lodgement portal CASE page open in your web browser
- You will need to know the property postcode and address.
- 1. Click on Site Details, located under the Report Information area.

Report		
File Report		
Report Information     Report Details     Site Details     Assessor Details	Site Details	
Calculation Details	Address Line 1	
Inspection Report	Address Line 2 Address Line 3	
Inspection Certificate	Address Line 4	
Additional Data Manager	Town	
	Postcode	
	UPRN	
	Property Type	

- 2. Log in to the lodgement portal, click on CASES and click on the "New Case" button to add a new case
- 3. The Case page will ask you to enter a postcode and click on "submit"

Cases QA Address Management	Assessor : Pavlos Konstantinidis 🗡
Case Detail	ACTIONS ~
Data Checks	XML
Registry Address By Postcode By UPRN By Street and Town	Upload XML
Post Code SW12 9BS	Choose file No file chosen
SUBMIT	UPLOAD

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Lodge Report

4. The case will display a drop-down menu with your address search results. Click on the dropdown, select the correct property and click on "select".

Case Detail	
Data Checks	XML
Registry Address By Postcode By UPRN By Street and Town	Upload XIV
Post Code	Choose file Select a valid XM
SUBMIT	
Cibse Services Ltd, 222 Balham High Road, LONDON SW12 9BS • SELECT Camden Coffee House Ltd, 208 Balham High Road, LONDON SW12 9BS 208a Balham High Road, LONDON SW12 9BS 210 Balham High Road, LONDON SW12 9BS 212 Balham High Road, LONDON SW12 9BS Messers Winter & Bedfors, 214 Balham High Road, LONDON SW12 9BS 218a Balham High Road, LONDON SW12 9BS Flat 1, 220 Balham High Road, LONDON SW12 9BS Flat 2-8, 220 Balham High Road, LONDON SW12 9BS	
Cibse Services Ltd, 222 Balham High Road, LONDON SW12 9BS The Parish Church of St. Mary & St. John the Divine, St. Marys Church, Balham High Road, L 208 Balham High Road,LONDON,SW12 9BS	ONDON SW12 9BS

5. The property address details will be displayed on the case.

Case Detail				
Data Checks				
		CHANGE		
Registry Addres	S			
UPRN :	765393680000			
Address 1 :				
Address 2 :	Cibse			
Address 3 :	222 Balham High Road			
Address 4 :				
Post Town :	LONDON			
Post Code :	SW12 9BS			

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6. Copy and paste the address lines one by one, from the lodgment portal to the Site Details area on the DCLG AirCon Report Software.

Report		
File Report		
Report Information     Report Details     Site Details     Assessor Details	Site Details	
Calculation Details	Address Line 1	
<ul> <li>Inspection Report</li> </ul>	Address Line 2	Cibse
	Address Line 3	222 Balham High Road
<ul> <li>Inspection Certificate</li> </ul>	Address Line 4	
Additional Data Manager	Town	LONDON
	Postcode	SW12 9BS
	UPRN	765393680000
	Property Type	Office



The Address Lines must match and are **case sensitive**. If Address Line 1 is blank or empty on the lodgement portal website (as per the above example), it must be left blank or empty on your AC report (please make sure you have not typed any spaces in this line). If the Town field on lodgement portal is in CAPS, it will have to appear in CAPS on your

software. The property address information provided displayed on the lodgement portal website is retrieved from the Landmark register database.

7. Click on the Assessor Details area. If you created more than one assessor, the drop-down list will allow to select the correct assessor. The assessor details cannot be modified from this section as they are managed from the Assessor Manager window, accessible from the main screen.

Report		
File Report		
Report Information     Report Details     Site Details     Assessor Details     Calculation Details	Assessor Details Select Assessor Profile	eph Taylor at CIBSE Certification Ltd (A1832437135.xml)
V Inspection Report	Assessor	
<ul> <li>Inspection Certificate</li> </ul>	Assessor ID	LCEA125968
Additional Data Manager	Assessor Name	Dr. Joseph Taylor
	Accreditation Scheme Name	CIBSE Certification Ltd
	Website Address	www.cibse.org
	Employer/Trading Name	CIBSE
	Employer/Trading Address	222 Balham High Road, SW12 9B5, London
	Qualifications	SP3, CC4
	EMail	jtaylor@cibse.org
	Telephone Number	0208 722 3648
	Insurance Details	
	Insurer	AIG
	Policy Number	TEST PROFILE
	Effective Date	01/06/2009 15
	Expiry Date	01/06/2012 15
	Professional Indemnity Limit	100

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8. The Calculation Details area will display the software version being used to produce the AC inspection report. Make sure you always have the latest version of the software available.

If the report information process was completed successfully, by now all the subsections (*Report Details, Site Details, Assessor Details, Calculation Details*) should contain the necessary information and you can move on to the next section.



#### Filling in the Inspection Report area

The Inspection Report area contains **text boxes** that should be used to detail information such as improvements, recommendations and AC inspection information.

 Click on Inspection Report and then on Inspection Report Details to open the first section. Write the executive summary, the equipment owner and equipment operator details. For details on what the executive summary should contain please use the pre-set section titles in the software as they appear below.

		8
File Report		
Report Information Report Details Site Details	n Report Details	
Assessor Details Calculation Details Exec	cutive Summary Building ty	pe/details (building benchmark and occupancy profile)
Inspection Report	System typ	pe/details
Key Recommendations Sub Systems Pre Inspection Information	Sampling s	statement in accordance with DCLG guidance
Cooling Plants Cooling Plant Cooling Plant Chillers Cooling Plant Equipment	Comments	on controls/maintenance/operation
Cooling Plant Humidity Control Cooling Plant Inspection Cooling Plant Maintenance	Comments	on availability of system documentation (or whether it had to be prepared)
Cooling Plant Metering Cooling Plant Refrigeration	Additional	information of relevance to the building/system/inspection/report
Cooling Plant Sizing Air Handling Systems	Building Name	
Torminal Units	Party Disclosure Not relate	d to the owner/occupier or person who has technical control of the system or subcontractor 💽
	ent Owner	
	nent Owner's/Manager Name	3
Additional Data Manager	Telephone Numbe	r
Equ	ipment Owner's Organisatior	
	AddressLine :	
	Address Line 2	2
	Address Line 3	
	Address Line 4	
	Towr	
	Postcode	
Equipm	ent Operator	
1 COMPANY		•





Notice the vertical scroll bar. You will have to scroll down in most of the inspection report sections to enter all the required information. Missing information or unanswered sections will lead to errors at the end of the process. *We recommend that you complete all the fields in each section.* 

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Download & Install Software	reate user profile	Purchase Lodgement Credits	Create AC Report	$\geq$	Lodge Report

2. Click on Key Recommendations and on each subsection on the right pane to find an area where you can add recommendations.

Report	(S)
File Report	
Report Information     Report Details     Site Details     Assessor Details     Calculation Details	Key Recommendations Sub System Efficiency Capacity Cooling Loads
<ul> <li>▲ Inspection Report</li> <li>Inspection Report Details Key Recommendations Sub Systems</li> <li>Pre Inspection Information</li> <li>Cooling Plants</li> <li>Cooling Plant Chillers Cooling Plant Equipment Cooling Plant Equipment Cooling Plant Repetion Cooling Plant Maintenance Cooling Plant Meeting Cooling Plant Meeting Cooling Plant Meeting Cooling Plant Meeting Cooling Plant Sizing Air Handling Systems Terminal Units</li> <li>System Control</li> </ul>	Move Up Move Down Delete Edit Add Improvement Options Alternative Solutions Other Recommendations

3. To add a recommendation, click on Add, type in the details and then click on the Add button again.

Key Recommendations		
Sub System Efficiency	Capacity Cooling Loads 🔿	<u>_</u>
	Add Recommendation	
	Recommendation	
	Add Cancel	
		Delete Edit Add

Key Recommendation	ons				
Sub System Efficien	cy Capacity Cooling	Loads 🔦			
		Move Up	My recommendation 1 My recommendation 2		
		Move Down			
				Delete	Edit Add
Improvement Optic	Edit Recommen			$\otimes$	
Alternative Solution Other Recommenda		My recommendation 2 Recommendations go her	e, this box supports multipl	e lines and paragraphs.	
			Edit	Cancel	

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rt Lodge Report

4. Click on Pre Inspection Information to move on to the next section. Tick the appropriate boxes for the System Control details.

Report			×
File Report			
Report Information     Report Details     Site Details     Assessor Details     Calculation Details	System Control Details Itemised list of installed air conditioning and refrigeration plant including product makes, models and identification numbers.	<sup>4</sup> 🗆	、 、
Inspection Report     Inspection Report Details     Key Recommendations     Sub Systems	Description of system control zones, with schematic drawings.		
Pre Inspection Information Cooling Plants Cooling Plant Cooling Plant Cooling Plant Eulipres Cooling Plant Eulipment	Description of method of control of temperature.		
Cooling Plant Humidity Control Cooling Plant Inspection Cooling Plant Maintenance Cooling Plant Metering Cooling Plant Refrigeration	Floor plans and schematics of air conditioning systems. Reports from earlier inspections of air conditioning systems, and for the generation of an energy performance certificate.		
Cooling Plant Sizing Cooling Plant Sizing Air Handling Systems Terminal Units Systems Controls	Records of maintenance operations carried out on refrigeration systems, including cleaning indoor and outdoor heat exchangers, refrigerant leakage tests, repairs to refrigeration components replenishing with refrigerant.		111
System Control	Records of maintenance operations carried out on air delivery systems, including filter cleaning and changing, and cleaning of heat exchangers.		

.

To add a Sub Systems area, right click on Sub Systems and select Add Sub System from the box. Please refer to the ACI Conventions document for guidance on how to name Sub-Systems.

<ul> <li>Inspection Report</li> </ul>	If you require additional sub forms or have one too many, you can right click on the sub form to add more, delete or clone	
Inspection Report Details Key Recommendations Sub System Sub System Pre Inspection Information	forms.	ie sub form to add more, delete of clone
<ul> <li>Cooling Plants</li> <li>Cooling Plant</li> <li>Cooling Plant</li> <li>Cooling Plant Chillers</li> <li>Cooling Plant Equipment</li> <li>Cooling Plant Humidity CC</li> <li>Cooling Plant Inspection</li> <li>Cooling Plant Maintenanc</li> <li>Cooling Plant Metering</li> <li>Cooling Plant Refrigeratio</li> <li>Cooling Plant Sizing</li> <li>Air Handling Systems</li> <li>Terminal Units</li> <li>System Control</li> <li>System Control</li> </ul>	ing Clone Sub System Cooling Hant Chillers Cooling Plant Equipment Cooling Plant Equipment Cooling Plant Humidity Control Cooling Plant Inspection Cooling Plant Maintenance Cooling Plant Maintenance Cooling Plant Refrigeration Cooling Plant Refrigeration Cooling Plant Sizing Handling Systems Innal Units ems Controls	Deleting and cloning sub forms
	System Control	

- 5. Click on Cooling Plant Chillers to move on to the next section. Fill in all the Cooling Plant sections as appropriate. Make sure that you have answered all the fields before moving on to the next section.
- 6. Similarly to the Sub-systems, the user can create more than one Cooling Plant or delete a an existing Cooling Plant or clone an existing Cooling Plant if applicable. Attention is need while cloning to apply all the amendments needed that are specific to each Cooling Plant.

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- 7. Please refer to the ACI Conventions document for guidance on sampling and the number of Cooling Plant that need to be inspected and included in the report
- 8. Click on Systems Controls to continue completing your report. Similarly to the above, you can create, delete or clone System Controls appropriately.
- 9. Fill in the Systems Controls area.

System Control Details		-
Note the current indicated weekday and time of day on controllers or BMS against the actual time.		
Note the set on and off periods (for weekday and weekend if this facility is available with the timer). Notes and Recommendations	Recommendations	
Is there a shortfall in timer capabilities? Notes and Recommendations		
	Recommendations	
and cooling emitters, heat flows or likely temperature distributions in the zone or space?		
Notes and Recommendations	Recommendations	
Note the set temperature in each zone for heating and cooling in relation to the activities and		
occupancy of zones and spaces in relation to the manager's intent. Notes and Recommendations	· Recommendations	
Are guidance notices visible or controls available to inhibit use of cooling equipment whilst windows are open or cooling/heating is on?	0	
Notes and Recommendations	Recommendations	
Note whether a 'dead band' is, or can be, set between heating and cooling.		
Notes and Recommendations	Recommendations	

If you have followed all the steps, by now all the subsections under the Inspection Report area should be completed and contain all details about the A/C installation.

## Filling in the Inspection Certificate area

The Inspection Certificate area will enable you to enter details such as building name, F-Gas compliance date and rated output.

1. Click on Inspection Certificate Details to start. Complete all the fields, paying special attention to the F-Gas Compliancy Date field.

Certificate Details		
Building Name		
F-Gas Compliant Date	Not Applicable V Select a date 15	
AC Rated Output	Inknown	
Random Sampling		
Treated Floor Area		_
AC System Metered	lo 🗸	
Refrigerant Charge Total		

 Click on the Certificate Sub System link to add details of your Sub-Systems such as Refrigerant Type Filter and the Sub System's age. You can create new Sub-Systems by rightclicking on this tab and select "add Sub System".

Certificate Sub System De	stalls	
Sub System Number		
Sub System Description		
Refrigerant Type	Filter -> HCFC 22 V	
Sub System Age		

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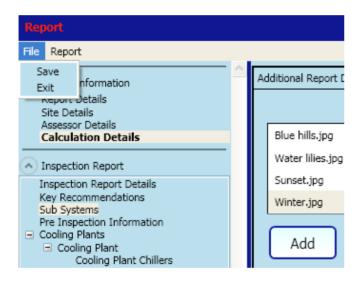


#### Filling in the Additional Data Manager area

The Additional Data Manager was designed to allow you to save additional files (such as images) with the report. However, this function is currently (version 2.0.6) not operational. *We strongly advice our assessors to avoid using this function on the current version of the software (2.0.6) as it will increase the size of your xml file and if this size exceeds 10MB the register will reject your lodgement* 

By now you should have been able to complete all the required and relevant sections for your Air Conditioning Inspection Report.

Click on File > Save to save your report.



## Validating your Report

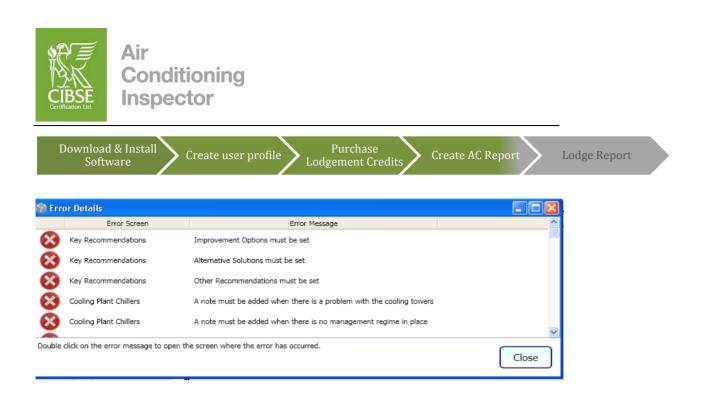
There are two methods to validate your report.

Validate Report: This method will check all your data entry for errors and missing items throughout all the sections of your AC report.

Validate Page: This method only checks the current page.

This tool will display a list of errors that need to be addressed before a final report can be generated. Double-click on any error to open the page the error is located on.

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1. Continue using the Report Validation tool until there are no errors found in your report. When you are done, click on File > Save and then File > Exit to go back to the main screen.

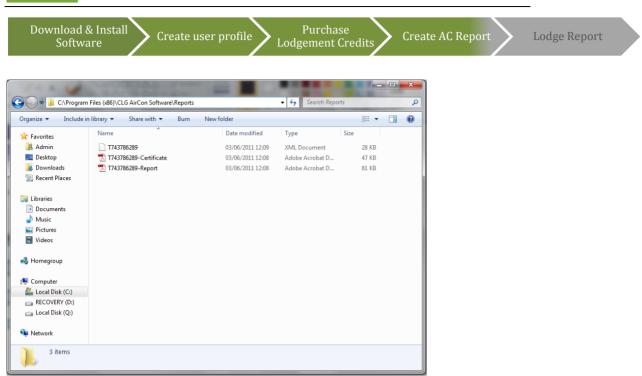
## **Generating the Final Report**

The Generate Final Report button will generate an XML file ready for lodgement via the lodgement portal website, saved in the "FinalReports" folder, in your DCLG AirCon Software folder. Please note the RRN style file name.

R	eportManager			(	X
ſ	Certificate RRN: 0060-7947-06 Report RRN: 0794-0368-83				*
	Final Report Saved			×	
l	Final Report has been sa	ved to FinalRe	eport as 0060-7947	-0689-8730-3044.xml	
				ОК	-
	Create		Delete	View Assessor Manager	)
	View Report	Viev	v Certificate	Generate Final Report	)
			About	)	

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## **View Certificate and View Report**

These two options found on the main screen will allow you to see a watermarked PDF version of the AC inspection certificate and report.

These reports are saved in "Reports" folder along with the job file which is an xml file with a T prefix in the file name. Please note that although the job file is an xml file this is not the file that is lodged. The xml file for lodgement is found in the "Final Report" folder with no T prefix.

Air Conditioning In	spection Cer	licale				Air Conditioning Inspection Rep	ort			
Bite Details:						Site Details				
quipment Ceners Crips		Head Greet Medical C				Site Address (where inspection was certial out)	Heald Green Medical Centre, Fin	And Lane, Head Green, CHEADLE SHID 31D		
quipment Owner's / Ma		Or Jonest Taylor		0045299		City Chings and the served out	Postade BR33/D	NIOt	THEOR REAL PRIME DONO THE	-
supriere Center's ASS 18 A Million				PART GART CHEAD.			Policia de Salo	100 CONTROL 100	THE REAL OF AUGUST	
A SCIENCE INTERNATION WAS DR	-	Hand Great Medical	and the second second	R HARD GIVE CHEAD.	6, 948 340	Report Information				
N 1064		Post state		0000 794	7 0006-0720-2044	Inspedior Date 2011-06-00	1660 Ditte 2011-08-02	1496 1496 1496 1496 1496 1496 1496 1496		_
			ALL ALL	ARTICLEVE LANE 3		Assessor Details				
exect information :		_				American	Devid Rushen Johnston		Assessor D LOSA(2)	3947
port shareados:	2011-09-02	Next Inspection Date	2015-05-02	Name Carte	2011-09-03	EnglowerFinding Name	Hue Site Design Services	_		
	20110000	The report of	2010/00/00		2011/00/04	Englished Tables Address	Building 1000, Kings Result, Yana	In set Departed for the set		
assessor Defails:		Buchan John		Caresal D	LOSADDAR	Accerditation Scheme Name	Citible Centification Ltd	E/M		
Natata Altites Related Party Discourse	NO	Due sky erwindsmertel op de Noted to the ownerboougier o Intentor		statistics como of the sy	iten or					
ABREAT AT SUBWAY UP	et 0.6	ACRIMUM, V2.0								
		Culput (KM)	250	Syden Samping?	Tes					
NOT Applicable		Air Conditioning Systems	185	Total Fathrand Refigerant Charge Sigh	109					
of Apploide										
Not Applicable Treated Floor Area (117)										
ior Application Teated Floor Area (11*) sample of system elec		impected in accordance w	en DCLG guid	ince to produce this Air C	onditioning					
or Application reased Flour Area (11*) sample of system elem spection Report	nerts has been	inspected in accordance w								
voz Applicióle Treased Fillor Area (117) xample of system eler spector: Report		inspected in accordance w		constitute Age	onditioning of Main poments					
Not Applicable Treated Floor Area (117)	nerts has been	inspected in accordance w		constitute Age	of Main			ssue		



You will see an error pop-up if some of the errors highlighted during the report validation process were not addressed correctly. If this happens, open the report and run the validation process to address any pending issues.

Unable to generate PD	)F 🛛 🛛
Unable to generate PDF. I	Do you wish to view errors?
Yes	No

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#### Lodging your first report on the lodgement portal website

#### The portal lodgement process

To successfully complete this step:

- You will need your lodgement portal username and password
- 1. Log in to the lodgement portal with your username and password.
- 2. Click on the CASES tab and select the correct case by clicking on the "VIEW"

XML	
Upload XML	
Choose file No file chosen	
Select a valid XML file to upload.	
	UPLOAD

- 3. In the case please use the "choose file" option to browse your PC and find the XML file.
- 4. Once the XML file is selected, please click on "upload".
- 5. Then a number of validations checks will take place and will be displaced on the page. If a validation check fails the system will highlight this so that you correct and re-upload. If the checks are passes successfully then the "lodge certicate" option will appear and you can lodge the ACI report.



## What to do if your AC lodgement fails

All the checks completed by the lodgement portal are displayed in the front-end when you upload the XML file and highlighted in red.

The most common errors are the ones described below.

1. Address fields

The address fields in your DCLG AirCon Report Software must match the details on lodgment portal and are **case sensitive**.

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If Address Line 1 is blank or empty on the lodgment portal website, it will have to be left blank or empty on your AC report (no spaces or dashes should be typed). If the Town field on lodgement portal is in CAPS, it will have to appear in CAPS in your software.

The property address information provided displayed on the lodgement portal website is retrieved from the Landmark register.

#### 2. Insurance Details

The insurance details in your DCLG AirCon Report Software must match the details on lodgement portal and are **case sensitive**.

Go to your lodgment portal profile and check your insurance details, making sure that the insurance details entered in your AC report match the insurance details displayed on the lodgement portal website.

Do not input a pound sign "£" before your PII cover limit and make sure you have the right Insurer name, PII limit and insurance cover dates.

Correct the data entry errors and generate the final report again. Once the XML file on your C:\ drive has been updated (check the time stamp), log in to lodgement portal and repeat the lodgement process again.

#### If the QA checks are successful, your AC report will be immediately registered with Landmark.



#### **Retrieving a non-watermarked AC Report from Landmark**

The Non-Domestic Energy Performance Certificate Register holds a copy of all certificate lodgements for England and Wales <a href="https://www.ndepcregister.com/">https://www.ndepcregister.com/</a>

The Northen Ireland Non-Domestic Energy Performance Certificate Register holds a copy of all certificate lodgement for Northern Ireland <u>https://www.epbniregisternd.com/</u>

All certificates on the assessor's computer are watermarked to ensure lodgement before the certificate and report files are delivered to a client.

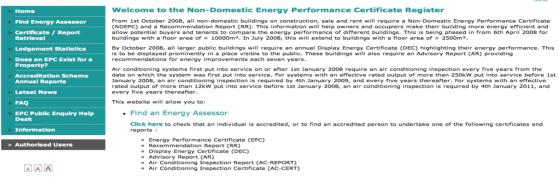
Follow these steps to retrieve a final copy of your lodged AC certificate and report without a watermark

1. Visit the England and Wales Non Domestic Energy Performance Register website on http://www.ndepcregister.com or https://www.epbniregisternd.com/ for Northern Ireland.

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# **Landmark**\*



- 2. Click on Certificate / Report Retrieval, and click the "Accept Terms" button if appropriate.
- 3. Enter the Report Reference Number (RRN Number) found on the lodgement portal website under Lodged Cases and click on Certificate / Report Retrieval

	e Home >> Certificate / Report Retrieva
▶ Home	Use this page to search for a report
Find Energy Assessor	RRN:
<ul> <li>Certificate / Report Retrieval</li> </ul>	Please enter the text that you see in the nearby image.
Lodgement Statistics	
Does an EPC Exist for a Property?	Certificate / Report Retrieval
Accreditation Scheme Annual Reports	
Latest News	
▶ FAQ	
EPC Public Enquiry Help Desk	Accessibility   Site Map   Information   Site Policy
Information	The Non-Domestic Energy Performance Certificate Register is operated by Landmark Information Group on behalf of the Government
▶ Authorised Users	Communities

4. Select the report from the list and click on "Download PDF" to retrieve the final version of the AC report for your client.

# **Additional Lodgement Portal Tools**

#### **My Profile**

This area shows all your LCEA profile information as it appears on Landmark and on the CIBSE database. The information displayed here is used by the automated QA checks when lodging a report. Remember that all the fields displayed in the Profile area must match the information entered in your software.

#### Address Management area

Use the Address Management area to:

- Add a new address to the Non-Domestic register.
- To refine an existing address.

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#### Adding a new address to the register

This first area of the page is used when you are unable to find the correct property details from the CASES area. This area is most useful when the building is a new building or when the address that appears on the database belongs to an old tenant or building owner.

Fill in the address lines, town and postcode as you want it to appear on your certificate. When you click "submit" your request will go directly to the register and they will respond via email. The Non-Domestic register will notify you of the outcome of your request within 24 hours. If you have difficulties, please phone Landmark on 03300 366 024.

## **Refining an existing address**

The address refinement tool allows you to modify the first line of your address by adding additional information such as details of a building (Site Building) within a campus, or a new extension to a building (Building Part), please use **ONLY one of the two options when you submit a request**. Please note that this tool does not delete or amend information from an existing address.

The Base UPRN is required to submit an address refinement. The base UPRN is an 8 digit number, e.g. 12345678, being the first 8 digits of a full 12 digit UPRN.

# **AC Inspection Reports is Scotland**

The requirements for AC Inspection Reports in Scotland apply the same way as in England, Wales and N. Ireland, all AC systems with a total cooling rated output of more than 12 kW must be inspected, at least once every 5 years.

The difference in Scotland is that the report cannot be produced in the DCLG approved software (eg. Sterling evolve, Quidos AIRS), as it can not facilitate addresses in Scotland. Also, there isn't an online register that accepts lodgements for AC Inspection Reports in Scotland.

AC Inspection Reports for buildings in Scotland should be produced using either the CIBSE Certification template for CISBE TM44 reports in Scotland or a relevant template developed by the Assessor that covers all of the reporting elements of CIBSE TM44. If you need a copy of the templates please send an email to <u>epc@cibsecertification.org</u>

When a report is completed and sent to the client, the Assessor should also send a copy to CIBSE Certification at <a href="mailto:epc@cibsecertification.org">epc@cibsecertification.org</a>, so that the report can be added to the Assessor's records, this is effectively the lodgement.

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# **USEFUL CONTACTS**

## **CIBSE CERTIFICATION**

Email: epc@cibsecertification.org Telephone: 020 8772 3649

Lodgement Queries: <u>epc@cibsecertification.org</u> Telephone: 020 8772 3620

# **Purchase of Lodgement Credits**

Kerstin Egger Email: <u>epc@cibsecertification.org</u> Telephone: 020 8772 3681

#### **CIBSE TRAINING**

Email: <u>training@cibse.org</u> Telephone: 020 8772 3660

#### DEPARTMENT OF COMMUNITIES AND LOCAL GOVERNMENT (DCLG)

Write to: 2 Marsham Street London SW1P 4DF

For more information on the Energy Performance of Buildings Directive visit: <u>http://www.communities.gov.uk/epbd</u>

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