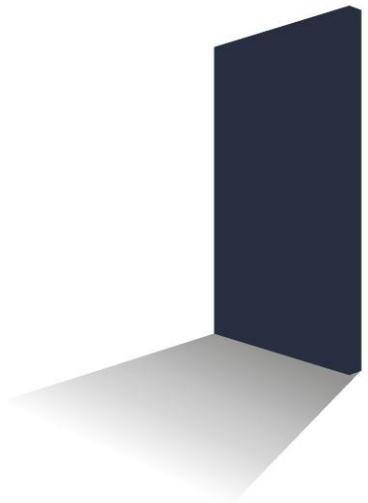

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Certificates

(Tantum eruditi sunt liberi)

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Maintenance Certificates

Manage Certificates by Property

In this section you are able to keep control of all the certificates applicable to the properties that you are managing. The certificates that can be entered and stored electronically on the system are:

Yearly Certificates

- Gas Safety
- Portable Appliance Testing
- Fire Alarms
- Emergency Lighting

Five yearly Certificates

- Electrical Installation Test
- HMO Licence

Ten year Certificates

- Energy Performance

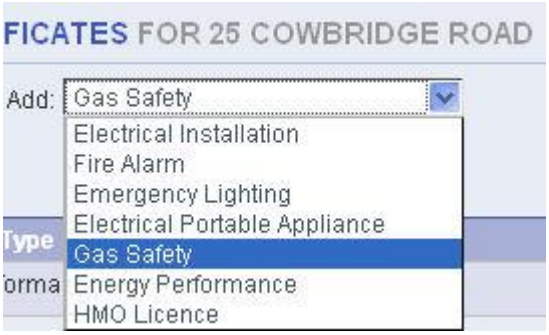
It is possible to add additional custom certificate types to the list of maintenance certificates by selecting *Control Panel>Object Types>Certificate Types.* In order to avoid duplicate certificates on a property it is only possible to enter a certificate once for each type.

Add a Certificate

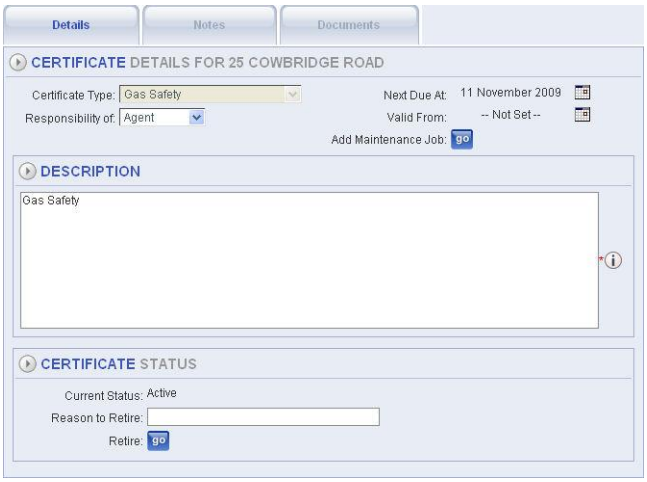
To add a certificate go to Manage Certificates by Property you will need to type the search criteria into the search screen. Select your property by ticking the box next to it and click on **Next**.

The following screen will now allow you to set the certificate required.

From the drop down menu select the type of certificate that you want to raise in this sample case a Gas safety certificate is raised.



Details Tab



On the following screen fill in the desciption of the appliances etc that are to be tested
At this stage the date will show ten years before the next certificate is due but this can be changed once the initial certificate has been completed.

Click on the Add maintenance job button to raise a work order. (maintenance job raising is covered in the Maintenance section of this manual)

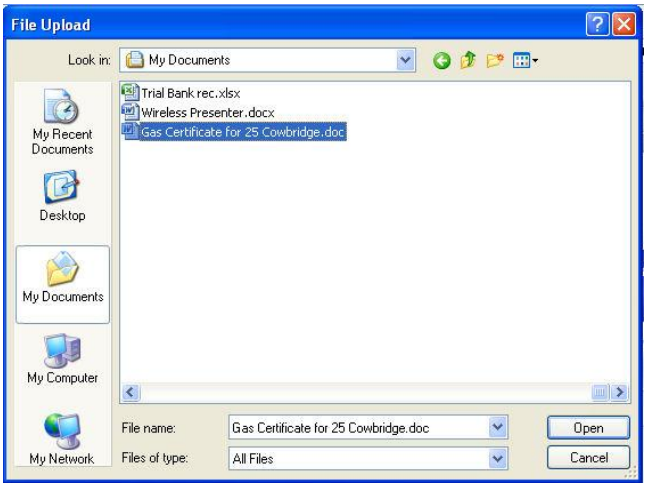
When the certificate has been completed set the date for the next certificate to become due and the valid from date

Notes Tab

If you need to add any notes regarding the certificate type in your note and click on the Add button. This notes box will also record whether the certificate has been retired or reactivated.

Documents Tab

On the documents tab you can upload the certificate into the system. First save the certificate on to your pc then click on the browse button to locate the certificate.



When located click on the open button and it will upload into the system

Manage Certificate by Property

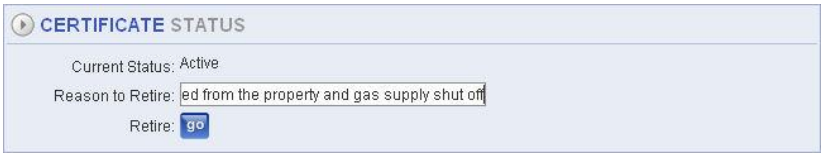
Using the search function select the property you require.

Click on the next button and you will call up all certificates that have been raised on the property.

Certificate Status Change

If the status of a certificate has to be changed e.g. Gas Certificate no longer needed, follow the procedure shown below.

Search for the property that you require as above and select the certificate that is to be retired.



Enter a reason for retiring the certificate and click on the Retire; Go button then click the ok action button.

Manage All Certificates

The process of managing all certificates is the same as managing by property. When opening this option you will be able to check on any certificate that is recorded on the system. By selecting the edit button you will be faced with the same screens as when Manage Certificate by Property was selected and be able to make any amendments and add a maintenance job if required. This list can be exported to Excel if required. You can also add retired certificates to the list by ticking the “Show Retired” box to facilitate restoring a certificate.

Energy Performance Certificate

Process of Ordering an EPC Certificate

When a property is going to be advertised to let go to ***Maintenance>Maintenance Certificates>Manage Certificates by Property*** use the standard search criteria to locate the property that needs the certificate to be raised.

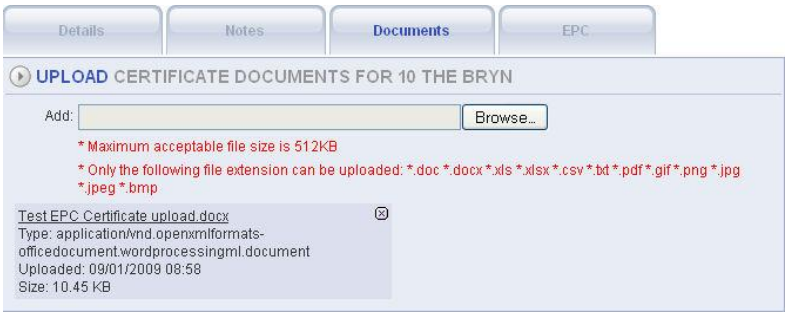
Click next and select Energy Performance from the drop down list and click the Add button.

Click the ***Add Maintenance Job*** button and create a job to instruct a surveyor (recorded as a contractor on LetMC). This provides an audit trail to prove to Trading Standards that an EPC has been ordered. Follow the standard procedures for completing the job shown in the maintenance section.

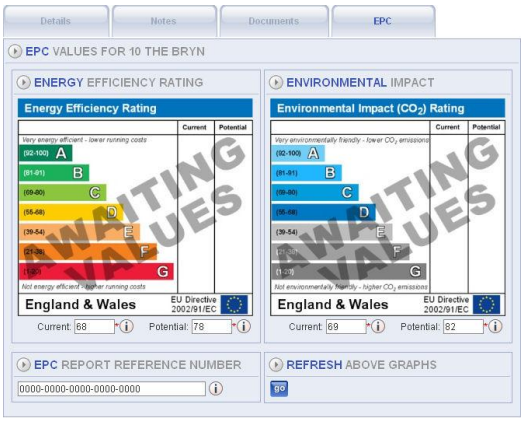
Once the surveyor has carried out the EPC they should email a copy of the certificate to the Letting Agent, save this to your PC. Go to *Manage Certificates by Property* search again for the property and open the certificate details using the edit button.

With the certificate details open select Responsibility of, check that correct date are set (remembering that this is a ten year certificate.
Using the Notes tab record any notes.

Upload an EPC Certificate
Open the Documents Tab click on the browse button and search for the saved certificate and upload it into the letmc system.



Select the EPC tab

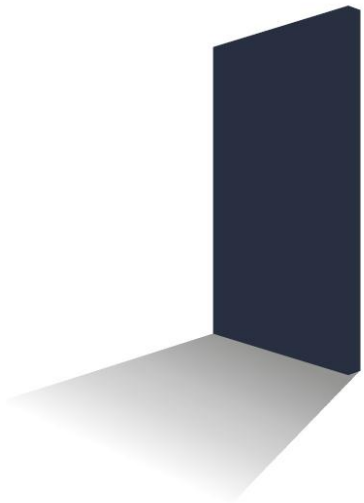


Record the EPC Report reference number and the EER and EI current and potential values into the *correct fields* and click the Refresh Graphs button.

Validation criteria for the EPC certificate's *Environmental Impact Rating* in *Maintenance>Maintenance Certificates>Manage Certificates by Property* has been removed. It is necessary that the potential figure for environment impact can be set at a lower value than the current figure. This is because in some circumstance measures to improve a property's energy rating actually has a worse impact on the environment.

Finally click ok and Finish to save the data.

Marketing Output that includes EPC Values.
Property Brochure.
The Property Brochure includes the two graphs and a short explanation on the third column on the second page.
Window Display.
The Window Display includes the graphs below the main picture.
Properties to Rent List.
In the Properties to Rent List view there is a tick-box called Show EPC figures. If this is ticked then the Properties to Rent List can be created showing the EPC values (not the graphs).
Rightmove and other Website Portals.
LetMC feeds the EPC graphs to portals that use the Rightmove V3 data feed such as www.rightmove.co.uk.



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