



## EDIRECT CERTIFICATES OF COMPLIANCE – FAQs

### ORDERING EDIRECT CERTIFICATES

#### 1 **I have a stock of paper pad certificates. How long will they be valid for issue?**

Paper pad certificates will be valid for Issue up until 31<sup>st</sup> March 2017. After that date only eDirect and Electronic Blocks can be issued. Contact Accounts at [accounts@nsi.org.uk](mailto:accounts@nsi.org.uk) for further information about Electronic Blocks of Certificates.

#### 2 **What are the advantages of 'eDirect' over 'Blocks of Certificates'? How do I decide what is best for my business?**

eDirect Certificates are available for you to issue as soon as they have been purchased. A history search function is provided for eDirect certificates and you will no longer need to return certificates to NSI by post. 'Blocks' are very effective for companies using proprietary software to issue and print certificates.

#### 3 **I want to order eDirect Certificates of Compliance for the first time. What do I need to do?**

eDirect Certificates of Compliance can be purchased on-line in the Company Login area of the NSI website ([www.nsi.org.uk](http://www.nsi.org.uk)), by your company's nominated Certificate Purchaser.

You will find by selecting '**Purchase Certificates**' from the '**Certificates**' a drop down menu a list of instruction documents available explaining the types of certificates as well as the standards and the choice of codes to input according to the installation you are certificating.

See the lists of instructions and select '**Click here for Instructions on the completion of eDirect Certificates**'.

*Optional: In addition, in the **Documents** area of the NSI website, click Certificates of Compliance and you will find the **E-Learning Certificate of Compliance Administration Guide** for electronic security. This also lists the details needed to complete certificates correctly and there is a test at the end.*

#### 4 **My Company Login does not allow me to buy eDirect certificates - what should I do?**

Call your NSI Operations Coordinator and check who in your Company already has '**Admin**' rights. Your NSI Operations Coordinator can change this for you if required.

Once the setup is complete your NSI Operations Coordinator will send you login details and/or new password, which you can change for your own security.

## 5 How can I order the correct type of eDirect Certificate?

Once you have logged into the NSI Company Login area of the website select '**Purchase Certificates**' from the '**Certificates**' drop down menu to see a list of the Certificate Types you are entitled to buy.

Select your required Certificate Type and enter the Quantity to purchase (the minimum purchase is one). Some companies buy certificates one at a time, whilst others purchase certificates in sufficient quantities for up to say 3-6 months of normal use.

## 6 How quickly must I use the eDirect certificates I have purchased?

eDirect Certificates remain valid for issue for 3 years from the date of purchase.

### PAYING FOR EDIRECT CERTIFICATES

## 7 Can we pay for eDirect Certificates using a debit or credit card?

To immediately access your certificates, make your payment by Debit or Credit card and your certificates will be available as soon as your card payment is processed.

Note that VAT is applied at the prevailing rate. Credit card payments carry an additional 2.5% charge.

Press the '**Complete Order**' button and you will see the confirmation that your order has been successfully processed.

Remember to keep a note of your order number for future reference (use screen print and save – it's a quick and easy way to do this).

You will receive an email confirming the financial transaction.

## 8 My Company prefers to pay by BACS for eDirect Certificates. What should I do?

Enter your order online and press the '**Print**' button to print a copy of the order confirmation (or save a screen print).

Press the '**Complete Order**' button and you will see the confirmation that your order has been successfully processed.

Remember to keep a note of your order number for future reference (use screen print and save – it's a quick and easy way to do this).

Ask the person in your company responsible for payments to transfer the funds to the NSI bank account:

- Bank: NatWest
- Sort code: 60-13-35
- A/c no: 86821989
- Reference: Certificate order number

Please remember BACS payments can take up to 2 working days.

**9 I have paid for my eDirect certificates. Where will I find them?**

Your certificates will be available by selecting the '**Issue certificates**' tab from the '**Certificates**' drop down menu as soon as your payment is processed.

**10 I have completed an eDirect certificate order but my certificates have not appeared in the Issue Certificates window?**

If you have paid by Debit or Credit card your certificates will appear in the Issue Certificates window immediately payment is processed.

If you have arranged for a BACS payment it can take up to 2 full working days from when your accounts department make the BACS payment instruction to your bank, before your certificates will be available for issue.

**11 How do I get my invoice from NSI for my eDirect Certificate(s)?**

In all cases the invoice relating to your order will be sent to you after your certificate order has been processed confirming payment.

**12 I need a proforma invoice before my payment for eDirect Certificates can be made. How do I get one?**

If your internal process requires a proforma invoice, contact the NSI Accounts Department ([accounts@nsi.org.uk](mailto:accounts@nsi.org.uk)) quoting the on-line order number in your order confirmation and your company name. A proforma invoice will be emailed back to you.

**13 NSI BAFE schemes: How do I purchase Modification certificates?**

Until further notice, these are available only as paper certificates with 2 parts; one for your client and one for your records. Contact to Accounts at [accounts@nsi.org.uk](mailto:accounts@nsi.org.uk).

**COMPLETING AND ISSUING EDIRECT CERTIFICATES****14 How do I complete and issue eDirect certificates?**

In the NSI Company Login area of the website select '**Issue Certificates**' from the '**Certificates**' drop down menu.

On the right hand side of the webpage your available certificate stock will be shown.

Select the Scheme and Certificate Type you wish to issue and a new window will open with a form for you to complete the certificate details.

**It is very important that eDirect certificate details are entered correctly online.**  
**IT IS NOT POSSIBLE to amend errors after you have selected the ISSUE button.**

See '**Click here for Instructions on the completion of eDirect Certificates**' at the top of the form for further assistance. There you will find a list of printable pdf instruction documents including listings of Police Authority Codes and Fire Authority Codes.

Print as required for your convenience, then click '**Hide Instructions**'.

After completing ALL the sections on the certificate, double check the certificate details have been entered correctly.

Only when you are satisfied that the details are correct, select the '**ISSUE**' button.

Call NSI (01628 637512) for assistance in completing your certificate.

Issued certificate details are updated on the NSI certificate database as soon as the '**ISSUE**' button has been selected (**This saves you the trouble of sending hard copies to NSI**).

A pdf of the certificate will be automatically created that you can print, sign and give to your client. Remember also - print or download the Terms and Conditions to send to your client.

## **15 Can I see my history of eDirect certificates previously issued?**

Yes! – a big advantage of using eDirect certificates. When logged on, you can select '**Certificate History**' in the '**Certificates**' drop down to search and view all your companies Issued eDirect certificates. You can also re-print a certificate at any time.

Please note: If you change your company name, the new name will appear on subsequent future re-prints.

## **16 Where can I find the Terms and Conditions relating to my eDirect certificates?**

You will find Terms and Conditions to issue to your clients by selecting 'Documents', then 'Certificates of Compliance' in the NSI Company Login area of the website.