The Guide to Producing a

PV Quality Assurance Manual © 2025

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About the Manual

Having talked to several contractors who have had experience of joining MCS for the purposes of supplying and/or installing PV systems in the UK, it became obvious that the process of setting up a Quality Assurance system was both laborious and difficult to manage.

Even when purchasing readymade Quality Assurance manuals, the process of configuring the manual for the company, understanding how the system works and then convincing the Assessor it was actually going to be used, could prove very complicated.

With many years of experience of simplifying various aspects of administration and paperwork for contractors, Hollycroft Software Limited decided it was time to apply some our own logic and technology to designing a Quality Assurance manual with one objective, to make it simple.

The QA Manual is a live on-going project and we welcome any comments and feedback.

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How to Use the Manual

The manual is designed with 4 sections:

1. **Procedures**
   - Define how your company is managed and run on a day to day basis.

2. **Lists and Registers (Coded L01 - L12)**
   - For keeping track of approved suppliers, sub-contractors, non-conformities and other check lists.

3. **Records (R1 – R6)** relate to the Lists and Registers.
   - For recording more detailed information on jobs, suppliers, sub-contractors and other subjects relating to the lists/registers.

4. **Forms (F01 - F14)** are required to run and commission the project.
   - Every form has been included for a complete PV installation; from the customer enquiry, to testing and commissioning

Before attempting to use the manual, we recommend that you follow the steps below. You may also find that the guide is easier to follow if you print out the procedures and all lists and forms and collate into a paper file.

Step One - Check the Procedures

We have made every effort to define each procedure that is required to cover a PV installation from enquiry to commissioning.

However, whilst we have attempted to ensure that our manual is ready to run "out of the box" we would recommend that you read all the procedures to ensure that they match your company's particular mode of operation.

You may find that you wish to define roles and label them more clearly within the procedures.   This will certainly make the manual more suitable for your company's requirements, but unless a particular procedure falls short of requirements, this is not strictly necessary.

To help you to target areas where you are most likely to make changes, please follow these points:

a) Procedure 1.4 assumes digital use and cloud backup. Recommended services include OneDrive, Dropbox, Google Drive, or Collabor8online. You can adjust this for secure local storage (e.g., encrypted USB drives or offline NAS backups) if preferred..

   MCS recommends retaining records for a minimum of six years, though you may adjust this period to suit your business or legal obligations.

b) **Procedures 2.1 and 2.2** make the assumption that you will have a paper copy of the contract file. This is useful to take to site or quick reference, but you may choose to keep the files electronically - paper is not a requirement.

   The 6 year period to retain records and cloud based backup is also mentioned here.

We have included the latest **MCS 001-1 Issue 4.2 (October 2020)** mapping notes at the end of the QA manual. These may be used to demonstrate internal compliance where certification is sought. The Enquiry Procedure also reflects best practice for handling sales leads and customer communication in line with consumer code standards such as RECC or HIES.

This QA manual is designed to align with the standards and guidelines of schemes such as MCS, RECC, or HIES where applicable. We welcome feedback and are happy to make changes where improvements are identified or required.

Step Two – Fill in the Lists

When you are confident that the procedures fit your business, you are ready to begin to fill in the details on the lists/registers. Remember that you can make alterations to the manual at any time to improve the “business flow”.

If you are already an MCS member and running a QA system you can simply copy over the information from any existing lists and registers you may already have.

If you are getting ready to join MCS, fill in as much detail as you can on the lists, even if it is only one or two suppliers. This will go a long way to helping an Assessor understand how your systems work and will demonstrate your willingness and ability to follow the standards and guidelines.

L01 Review of Company Roles and Responsibilities

Even if there are only 2 of you in the business, defining roles and delegating responsibilities is imperative to the system.

L01 allows you to add and edit positions and roles (positions can have deputies). These are the positions that you will have used in the procedures.

L02 Instrument Calibration Register

List all relevant testing instruments and equipment and record all required calibration data.

L03 Staff Training Register

List all staff members on the training register with their relevant competencies. The course and competency labels can be amended and added to.

You may already have Staff training systems in place with a variety of assessment recording methods. If required you could amend our *Staff/Engineering Training Procedure (PR5*) to follow your existing process.

L04 Manufacturer Document List

Review all the products you use or intend to use and add document information to the list. Many warranties and operational manuals for panels and inverters can be found on the internet. In this case, simply copy the URL from the address bar of the web page where you have found the link for a manual and paste into the Link/Location field on the form. Where only paper documents exist, enter the physical location *(e.g. filing cabinet, drawer A, etc.)*

L05 Required Guides and Standards List

We have already included many required standards and guides to give you a head start on this list, all that is required is that versions are checked and that the links are still working.

You might also have paper versions that you wish to add to the list and may also consider additional guides and standards to be worthy of inclusion. Again, if documents are web based, just copy the URL and paste to the location field.

L06 Approved Suppliers Register

When starting from new only include approved suppliers to the list.

L07 Non-Conformity Register

This list can be difficult to start when first setting up your PV business, but during your first trial installation it is worth noting non-conformities, wrong clips ordered, delivery did not turn up etc. It shows the assessor you are willing and able to follow the QA manual.

Please note: The Non-Conformity Register has a field called code, you can make your own codes up eg. 001, N001, and follow on alpha numerically. These codes are used in other lists and records to track non-conformities in discussions and for preventative actions (this saves rewriting the detail).

L08 Customer Complaints Register

Hopefully, not a register that will be used very often, record **R06 Customer Complaint** is used to record greater detail, the project number links forms back to the register which acts as a review document at internal meetings.

When entering Initial Assessment, a “dummy” record can be entered as an example – (Customer complained about staff swearing when cheque not available).

L09 Job List

Any PV contracts and projects need to be added to the list for review at internal meetings.

When entering Initial Assessment you will need at least one project you can add to the list.

R1 Job Sheet is available to record project information in more detail. **R2 Variation to Project** is available to record additions and omissions to jobs and should be attached to the job sheet.

L10 Purchase Order list

All purchase orders, whether written, phoned in or issued from a PC accounts package, that relate to a PV project will be detailed on this register.

Of course, if you are running a contract management software package you may wish to amend the purchase order procedure to suggest using a purchase order list report issued from the software as an alternative. This report could be printed to PDF to create an electronic record.

L11 Sub-Contractor List

When starting from new only include approved sub-contractors to the list.

R3 Sub-Contractor Record is also available to create a more comprehensive file for the sub-contractor.

R5 Formal Sub Contract Agreement must be signed by sub-contractors working on private clients' projects.

L12 Diary of Internal Review Meetings

When starting from new, you will at the very least need to have a meeting to discuss progress before an assessment day

R4 Meeting Minutes is available to detail actions and resolutions. It has suggested headings for topics that can be amended as required.

Step 3 – Fill in the Records

As well as completing the Lists/Registers, the QA manuals' records will also have to be filled in ensuring that the record is logged to the appropriate list/register.

R01 Job Sheet

If new to MCS you may only have one project to record. Completing the job sheet retrospectively will still offer good evidence for the Assessor.
For any new projects, (assuming you do not alter the process in the manual or use an alternate job sheet format), information should be updated on the Job Sheet regularly. This is used to check progress and manage omissions and additions via the Variation to Project records.

Any Job Sheets raised must be added onto the **L09 Job List register**.

R02 Variation to Project

If there are any variations to a job/project they should be recorded on this document and attached to **R01 Job Sheet**.

R02 Variation to Project records have a field for Project number which ties the record to the **R01 Job Sheet** and a field right of the document title for a record number, ie. 01. This record number is used on the **R01 Job Sheet** to note the variation and all variation documents associated with a project should be attached to the **R01 Job Sheet**.

R03 Sub-Contractor Record

All sub-contractors, (roofers, scaffolders, subbies, subcontract companies etc), should complete **R03 Sub Contractor Record** to confirm competencies and compliance with health and safety standards and requirements.

R04 Meeting Minutes

The R04 Meeting Minutes record has suggested headings for points to be discussed, these can easily be amended to suit alternative preferences.

Once a record of a meeting has been completed, the date of the meeting and next scheduled date should be entered on **L12 Diary of Internal Review Meetings.**

The meeting register and records will be of great interest to an Assessor who can quickly gauge the successful implementation of any QA system from the contents.

R05 Formal Sub-Contract Agreement

If any sub-contractors are taking part in a private client project they must sign the **R05 Formal Sub-Contract Agreement**. It is important to have these agreements in place as soon as possible.

R06 Customer Complaints Record sheet

Although all the QA manual lists and records are designed to be filled in on computer, it may be useful to have this record sheet pre-printed and “by the phone” so that the call handler can write down details whilst talking to the customer. The handwritten document can either be scanned or retyped for electronic storage.

Step 4 - Review of Health & Safety

A Health & Safety policy and method statements are provided with our software and are intended as a guide only. A review and comparison is recommended to ensure full compliance with Health & Safety guidelines and legal requirements for your company.

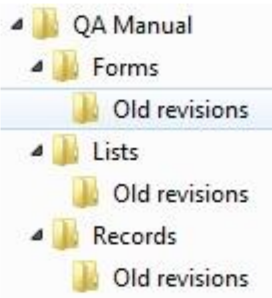
Where necessary you should revise the policy, procedures and statements.

Step 5 - File and Record Folders

All of the MS Word documents stored within the Hollycroft Software Limited Quality Assurance manual have a file extension of **.dot.**

This type MS Word document is defined by Microsoft as a template document which means the documents when amended (filled in, data added) can not be saved over the master files, you will be asked to name the file when saving and which Windows folder to save to.

Most computer users will be familiar with the usual folder called Documents, we would recommend that a new sub folder is set up called QA Manual and sub folders as follows:



For \Lists \Records\ and \Forms – create a sub folder called \Old revisions.

Use the \Old revisions folder to store documents where you have amended the revision number and revision date (assuming you have customised the Hollycroft documents to accommodate your company’s systems). The same structure could be used on a Cloud based document storage system.

Please do not hesitate to contact us if you require any assistance or guidance on this subject.