

Co-Assess Application Guide

NABERS Energy and Water for Offices



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Key Overview

To conduct a Co-Assess Application, it is essential to understand how to use NABERS Members' Website and the NABERS Co-Assess Calculator. The guide explains how to use the Calculator and how it interacts with the Members' Website.

A Co-Assess Application is typically made up of a Base and/or Whole Building Rating alongside its associated Tenancy Ratings. Other combinations are possible, e.g. multiple Tenancy Ratings only.

The Calculator is used in lieu of NABERS Rate.

Step 1: Start from NABERS Members' Website

1.1 Downloading Co-Assess Office Rating Calculator

The NABERS Co-Assess Office Rating Calculator can be downloaded from the 'My Work' drop down list on the NABERS Members' Website.

You will use the Calculator for data entry (refer to 'Step 2' section of this document)

Co-Assess Calculator download

Click here to download Co-Assess Calculator

1.2 Creating a Co-Assess Application

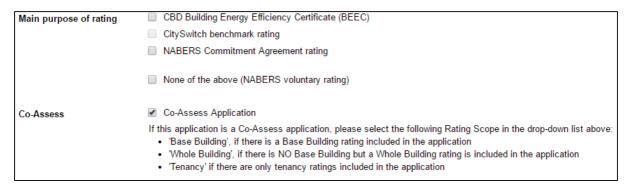
The creation of a Co-Assess application is a semi-automated process:

- You are required to manually create only ONE rating (called 'the Master rating'), no matter how many ratings are included in the Co-Assess application;
- The **REST of the ratings** will be **automatically** created by the system later.

1.3 Creating the Master Rating

Select 'New rating application' from the 'Ratings' drop-down list or 'New rating application' from the Ratings menu options, then tick the **'Co-Assess Application'** box to indicate It is a Co-Assess Application.

If the rating will be used for CBD, the 'CBD' box should also be ticked in the main purpose of the rating.



This particular rating you manually created is called 'Master Rating'. It is the single rating that enables you to manage all your ratings in the Co-Assess application, including data uploads, adding/terminating ratings, rating lodgement and response to L1 audit, etc.

Note: you must create the Master Rating under Base Building rating scope if there is any; if not, select the Whole Building rating scope; if only Tenancy ratings are involved in the application, contact the National Administrator for technical advice. Please note that if Water rating type is selected, the Water certificate & report will be associated to the Master Rating.

1.4 Unique Co-Assess reference number

The unique **Co-Assess reference number (Cxxxxx)** and the **Master Rating number** will pop up once you have finalised the creation of the application.

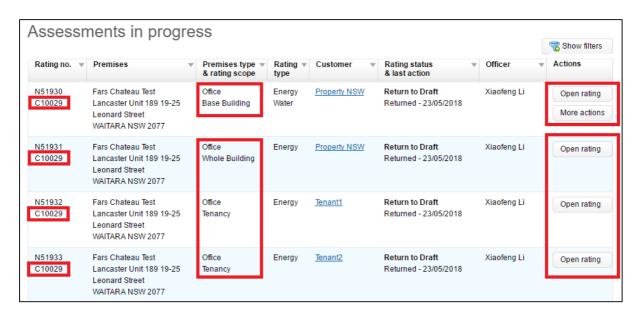


These numbers should be noted down, as it is required to enter them in the Calculator before uploading the Calculator (refer to 'Step 2' section of this document)

Creating the rest of the ratings automatically

The rest of the ratings included in the Co-Assess application will be automatically created by the system in Step 3.1, when you are (successfully) uploading the Calculator. The status of these automatically generated ratings will be shown on the 'Assessments in progress' page of your Members' Website.

As illustrated in the following screenshot, these ratings carry the same Co-Assess reference number as their Master Rating, but with limited interaction capability.



1.5 Completing other mandatory fields

On the Members' Website, the 'Premises' tab and 'Customer' tab of the Master rating must be completed before the application can proceed. This includes adding a contact person in the Customer tab.

Step 2: Using the Calculator

2.1 Calculator Fundamentals

- 1) The Calculator is a spreadsheet that includes some Macros. You would need to enable macros when using the Calculator.
- 2) **Completing tabs in a sequential manner.** There are numerous tabs in the Calculator that require other tabs to be completed first. When completing an application, bear in mind the following rules:
 - Complete one tab at a time starting with the tab at the left and moving right.
 - Do not start completing a new tab until you have finished completing the previous tab.
 - Complete each tab from 'Top to Bottom'.
- 3) Adding Extra Rows to a Table. When extra rows are required, click 'Add 10 more rows' button to extend the table.



4) **Data Completeness Check.** The data completeness status is located on the top of the tabs. Please check the status of the tab to ensure nothing is overlooked before moving to the next tab. If all sections are properly completed, the words 'DATA OK' will be shown on the top of the tab; otherwise 'INCOMPLETE DATA' is shown.



2.2 Entering Data for Info tab

By selecting the 'Yes/No' option in the dropdown list, the Calculator will enable/disable the relevant functions to conduct the desired ratings.

Premises Type:
Is the Whole Building being rated?
Is the Base Building being rated?
How many Tenancies are being Rated? Please enter the exact amount of tenancies that will be entered in this application
Is a Water rating also required?

Office
Yes
No
3
Yes

Note: The Calculator might flash several times when a value is offered in the cell. The relevant cells in all tabs will be available upon the number entered for number of tenancies.

2.3 Entering Data for Premises+Tenancies tab

Co-Assess Info Section

The unique **Co-Assess reference number (Cxxxxx)** will be used across the entire Co-Assess application process. Enter the number obtained from Step 1.2 (Members' Website) in the cell as shown below.



Tenancy Information Table for Individual Ratings

The information in this table is required to generate final Rating Certificates.

				Information on certificate			Certficate Type and Delivery		
Tenancy ID	Rating Scope	NABERS Rating Number	Customer Authorisation Received?	Organisation Name Change if different	Level	Full Address (incl Building name, Numero, Street, Town, State and Postcode)	Email address for pdf files (Customer's email address) Change if different	List on NABERS public website	For tenancy ratings only, purpose of the rating
Whole Building	Whole Building	N47617	Yes	Property NSW	NA	(Select)	property.nsw@environment.nsw.g ov.au	Yes	NA
Base Building	Base building		<select></select>		NA	NA NA		<select></select>	NA
1	Tenancy		Yes	ABC Pty Ltd	1	<select></select>	abc@gmail.com	Yes	CitySwitch benchmark rating
2	Tenancy		Yes	DEF Pty Ltd	2	<select></select>	def@gamil.com	Yes	NABERS Voluntary Rating
3	Tenancy		Yes	GHIPtyLtd	3-4	(Select)	ghi@gmail.com	Yes	NABERS Voluntary Rating

- 1) **Tenancy ID** each tenant is granted an ID number to distinguish tenancy data.
- 2) NABERS Rating Number enter the Master Rating Number (Nxxxxx) obtained from Step 1.2 in the Master Rating. Leave the Tenancy Rating Number empty until these ratings are granted with Nxxxxx numbers. Refer to Step 3.1 for more details.
- 3) **Customer Authorisation Received** the rating cannot proceed without the customer authorisation. A 'No' value prevents the creation of a rating number for the tenancy when uploading the Calculator. Refer to Step 3.2 for more details.
- 4) **Email address for PDF files** make sure to enter appropriate email address for all ratings, otherwise a breach of privacy may occur because the certificate & report may have been sent to recipients other than to the owner of the certificate.

2.4 Entering Data for Area+Hrs+Comps tab

Completing Functional Space Description

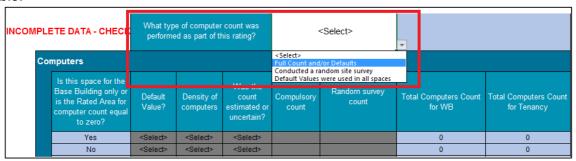
This section is the detailed breakdown of the entire premises being rated.

		Which ratings does each space belong to?					
Functional Space Description	Level	Base Building Rating	Whole Building Rating	Tenancy ID as detailed in 'Premises+Tenancies' Tab If it doesn't belong to any tenancy, please add 'None'	Organisation Name linked to Tenancy ID		
Retail	G	No	<select></select>				
ABC Pty Ltd	1	Yes	<select></select>	1	ABC Pty Ltd		
DEF Pty Ltd	2	Yes	<select></select>	2	DEF Pty Ltd		
GHI Pty Ltd	3	Yes	<select></select>	3	GHI Pty Ltd		
GHI Pty Ltd	4	Yes	<select></select>	3	GHI Pty Ltd		

Each individual Functional Space and its associated data will be assigned to its relevant Tenancy Rating using the Tenancy ID.

Completing Computers

You are required to select the type of method used for the computer count to active this table.



2.5 Entering Data for Energy tabs

Completing Main Utility Meter Section

Main Utility Meter refers to the meter with the largest use in the building. Normally it is the meter on the main supply point of the rated premises, e.g. the whole building meter in QLD, SA and WA.

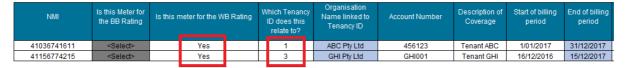
12 months of consumption data covering the Rating Period are required for this meter.

For example: select 'Yes' to the question 'if this meter for the WB rating?' when Whole Building Rating is involved in the Co-Assess application. If Whole Building Rating and Base Building Rating are both required in the application, select 'Yes' to both questions.

Other Utility Meters Section

The consumption data from other Utility Meters can be entered in this section as an cumulative value covering the 12-month rating period.

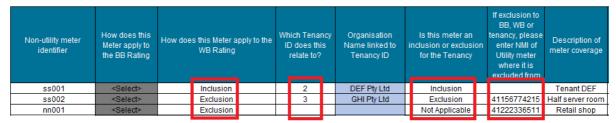
For example: a tenant side utility meter consumption can be applied to that Tenancy Rating, as well as the Whole Building Rating by the following setup.



Non-Utility Meters Section

The inclusions and exclusions of the consumption from a non-utility meter can be applied to the Base Building Rating, Whole Building Rating and/or a specific Tenancy Rating.

- a. **Inclusion:** add the consumption to the total consumption of that rating type.
- b. **Exclusion:** deduct the consumption from a specific Utility Meter account.
- c. **Not Applicable:** the metered consumption is not relevant to that rating type.



Note: copy and paste function is not recommended for entering the NMI. Any minor formatting differences could cause a misallocation of this amount of metered consumption.

2.6 Entering Data for Water tab

Data entry in the Water tab is identical to that in the Energy tab.

Step 3: Uploading the Calculator

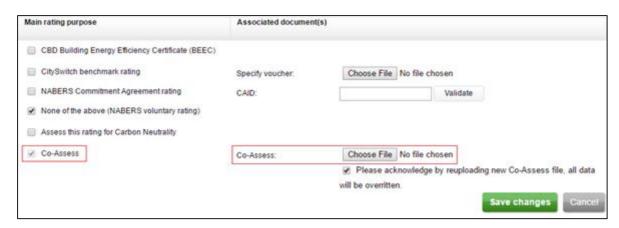
After entering all the data for the application in the Calculator, it is possible to upload the Calculator to the NABERS Members' Website using the 'Upload' function. The 'Upload' function can ONLY be used from the Master Rating you've created in Step 1.2.

When uploading the Calculator, the system will automatically create the rest of ratings included in the Co-Assess application, excluding the Master Rating you have already manually created in Step 1.1.

3.1 First Time upload

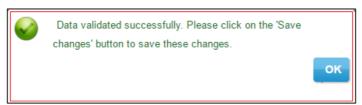
To upload the Co-Assess application from the Assessors' local working environment to the NABERS Members' Website, you must:

- 1) Go to the Master Rating application on the NABERS Members' Website.
- 2) Go to the 'Status & Action' tab in the Master Rating application the 'Upload' feature can be found under 'Associated document(s)' Section.
- 3) **Tick the acknowledge tick box** this is to acknowledge that every time you upload an excel file, the previous data will be overwritten.



4) Choose the completed Calculator – the system performs a validation process when you select the Calculator file from your local directory. If the Calculator fails any of the validation requirement you will be notified at this point via pop up message. You consequently need to address the issue (refer to Appendix of this document) and try again.

If all validation requirement has been met, you will be notified to proceed with clicking 'Save changes' button.



5) Click the 'Save changes' button to finalise the uploading process – A pop up message will be shown and then the name of the uploaded file should be shown under the 'Choose file' button if the upload is successful.



- 6) Check your email inbox for notification letter an email with NABERS Rating numbers will be sent to you when the Calculator is successfully uploaded.
- 7) **Finalise Premises+Tenancies tab** copy and paste these system generated Nxxxxx numbers back into the Calculator prior to the Second-Time upload.



Note: entering an incorrect reference number for Master Rating or leave it blank will terminate the uploading process.

3.2 Second Time upload or more

As soon as the Calculator has been uploaded to the NABERS Members' Website, it is not possible to remove it. However, it can be overwritten by re-uploading an updated Calculator.

Every time modifications are made to the Calculator, you must re-upload the Calculator to refresh the data saved in the Members' Website.

All the Nxxxxx numbers received so far, including the Master rating number and all the automatically generated ratings numbers, must be entered before re-uploading the Calculator.

Note: it is not allowed to re-upload the Calculator unless the Master Rating has been 'Unlocked' from the 'Status&Action' tab on the Members' Website.

3.3 Adding or removing Tenancy Ratings

It is possible to add new Tenancy Rating(s) or remove existing Tenancy Ratings from the application after the Calculator has been uploaded to the NABERS Members' Website.

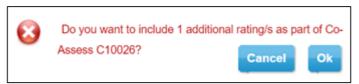
Adding new ratings to the Co-Assess application

You can add one or more new ratings to the Co-Assess application by following these steps:

- 1) Increase the 'number of Tenancy Ratings' in the Info tab This will add one or several rows to the table on the Premises+Tenancies tab.
- Enter data to the newly added Tenancy Ratings on the Premises+Tenancies tab
 Make sure the NABERS Rating number cell is left blank for the next Calculator upload.

				Information on certificate			Certficate Type and Delivery		
Tenancy ID	Rating Scope	NABERS Rating Number Enter rating numbers as received via email	Customer Authorisation Received?	Organisation Name Change if different	Level	Full Address (incl Building name, Numero, Street, Town, State and Postcode)	Email address for pdf files (Customer's email address) <i>Change if different</i>	List on NABERS public website	For tenancy ratings only, purpose of the rating
Whole Building	Whole Building	N47617	Yes	Property NSW	NA		property.nsw@environment.nsw.g ov.au	Yes	NA
Base Building	Base building		<select></select>	NA	NA	NA NA		(Select)	NA NA
1	Tenancy	N47618	Yes	ABC Pty Ltd	1		abc@gmail.com	Yes	CitySwitch benchmark rating
2	Tenancy	N47619	Yes	DEF Pty Ltd	2		def@gmail.com	Yes	NABERS Voluntary Rating
3	Tenancy	1147000	Yes	GHI Pty Ltd	3-4		ghi@gmail.com	Yes	NABERS Voluntary Rating
4	Tenancy		Yes	JKL Pty Ltd	5-6		ikl@gmail.com	Yes	NABERS Voluntary Rating

3) **Re-upload the modified Calculator** – A pop-up window will appear asking if you would like to proceed with the changes.



- 4) Check the automated notification email A notification email with the newly issued rating numbers will be sent to you.
- 5) **Finalise the modification** Copy and paste the new NABERS Rating numbers into the cell left blank in step 2) and repeat the uploading process to finalise the changes.

Terminating ratings in the Co-Assess Application

This modification can be achieved through the following procedure:

1) Change the value of cell 'Customer Authorisation Received' – Modify the value from 'Yes' to 'No' will terminate the specific existing rating application.

Note: never decrease the value in cell (E15) 'How many Tenancies are being rated?' after the first-time upload. This might cause errors in results.

2) **Re-upload the modified Calculator** – If the Calculator is successfully re-uploaded, a pop-up window will appear asking you to confirm the changes.



3) **Check the automated notification email** – The modifications made are summarised in the notification email.

Re-Include the terminated rating in the Co-Assess Application

Just in case that your clients changed their minds and would like to be re-involved in the Co-Assess application. This modification can be achieved through the following procedure:

- 1) Change the value of cell 'Customer Authorisation Received' Modify the value from 'No' to 'Yes' to re-activate the rating application after the Calculator is reuploaded.
- 2) **Empty the 'NABERS Rating Number' cell** Make sure the previous rating number Nxxxxx for this particular rating is deleted from the cell. The system will issue a new rating number for this rating.
- 3) **Re-upload the modified Calculator** If the Calculator is successfully re-uploaded, a pop-up window will appear asking you to confirm the changes.
- 4) **Check the automated notification email** The modifications made are summarised in the notification email.
- 5) **Finalise Premises+Tenancies tab** copy and paste the newly issued Nxxxxx numbers back into the Calculator and prepare for next upload.

Step 4: Lodgement and L1 Audit

4.1 Lodging the Co-Assess application

The Co-Assess application can ONLY be lodged via the Master Rating you created in Step 1.2. A successful lodgement of the Master Rating will lodge all the rating applications in the Co-Assess application simultaneously.

The lodgement process is identical to the lodgement for a traditional rating application.

4.2 Resolving L1 Audit Comments

Issues raised by the National Administrator will appear under the L1 Report tab ONLY in the Master Rating on the Members' Website..

You may address the L1 audit queries by following these steps:

 Download the latest version of Calculator you previously uploaded – The file can be downloaded from the Status&Action tab by clicking the hyperlink shown as "CoAssess Cxxxxx.xlsm".

Note: If the downloading process is not started after you click the hyperlink, check if it is your browser blocking the pop-up window. You need to allow pop-ups to initiate the download.

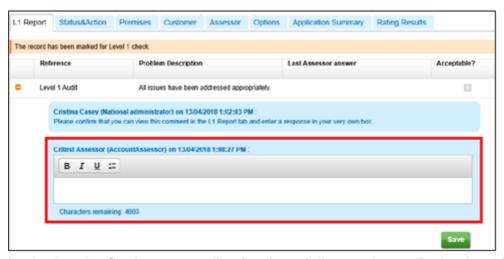


- 2) Amend the data entry in the Calculator if required according to L1 audit comments Fix the errors that have been identified and save the Calculator, preparing for re-upload.
- 3) Re-upload the modified Calculator to the Master Rating on Members' Website Please refer to Section 3.2 for the re-uploading process. You need to click 'Save changes' button to finalise the modification.

Note: If no changes are required for the Calculator, you may skip Step 3) by directly click 'Save changes' button and proceed to Step 4).

4) Finally provide your response to the L1 audit queries and then 'Go to Lodge'—
The response must be entered through the dialog box on the 'L1 Report' tab.
As soon as answers are provided in the dialog box, a green button 'Go to Lodge' will appear under the box. By clicking the button, you will be re-direct to the Status&Action tab for re-lodgement.

Note: If the newly uploaded Calculator hasn't been saved before answering L1 audit question, the 'Go to Lodge' button won't appear. To make it appear, it is required to resave the Calculator, and then re-edit the L1 answers.



5) Re-Lodge the Co-Assess application for a follow up L1 audit check – After the issues have been responded to, you will need to re-lodge the application with NABERS. This process will go back and forth until all issues in the rating have been sufficiently addressed.

Step 5: Certification

When the issues identified in the audit process have been properly addressed, the National Administrator will certify all the ratings in the Co-Assess application.

Emails with Rating Report and Rating Certificate will be sent to the Assessor and/or Customer, based on the email addresses entered in the Premises+Tenancies tab.

Validity of Certificates

The validity of all ratings within a Co-Assess application is using the same rules as the NABERS "RULING: Validity period of NABERS Certificates".

- The validity for the Base Building rating is applied to all ratings where a Base Building rating is conducted;
- The validity for the Whole Building rating is applied when no Base Building rating is conducted:
- The validity is based on the largest tenancy when only Tenancy ratings are conducted.

This applies for rating renewals or replacements, even if there are a different number of ratings from the previous application.

Appendix: Error Code and Solutions

Pop-up Error Message Box	Solution
The Co-Assess calculator could not be uploaded because the premises, customer and/or primary customer contact haven't been selected in the current rating application.	Complete compulsory data in premises tab, customer tab and 'Add contact person' in Master Rating on Members' Website.
The Co-Assess Calculator could not be uploaded because the master rating number is missing or incorrectly entered in the Co-Assess Calculator.	Make sure the Master Rating Nxxxxx in cell 'NABERS Rating Number' on 'Premises+Tenancies' tab in the Calculator match with the Nxxxxx on the Members' Website.
The Co-Assess Calculator could not be validated because the 'State' of the premises in the Co-Assess Calculator doesn't match with the 'State' of the premises in the Master rating application.	Make sure that the 'Premises' section entered in 'Info' tab of the Calculation aligns with the 'Premises details' selected on the Members' Website when the Master Rating is created.
The Co-Assess Calculator could not be uploaded because the Master rating number in the Co-Assess Calculator is not associated with the correct rating scope ('Rating scope' means Base Building, Whole Building or Tenancy rating).	Abandon the current rating application on Members' Website and create a New Rating Application with rating scope matching with the Calculator.
Master rating does not include Water to be rated but Water data is present in the Calculator.	Abandon the current rating application on Members' Website and create a New Rating Application with Water rating box ticked.
Master rating includes Water to be rated which is not present in Calculator.	Check the 'Rating Results' tab in the Calculator to make sure star rating results are correctly shown in the WATER table.
The Calculator could not be uploaded because it contains the below terminated ratings:	Change the value from 'Yes' to 'No' for the particular rating in cell 'Customer Authorisation Received' on 'Premises+Tenancies' tab in Calculator.
Nxxxxx	If you want to re-include the particular rating into the Co-Assess application, change the value to 'Yes' and then delete the Nxxxxx in the 'NABERS Rating Number' cell to make sure this cell is blank.
The Calculator could not be uploaded because it contains the below rating numbers that do not exist in the system: Nxxxxx	Make sure the Nxxxxx numbers in 'NABERS Rating Number' cell on 'Premises+Tenancies' tab in Calculator are matching with the Nxxxxx numbers in the notification email.

