



# MCS TECHNICAL DOCUMENT CONTROL PROCESS

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The MCS Service Company Ltd  
First Floor, Violet 3  
Sci-Tech Daresbury,  
Keckwick Lane,  
Cheshire WA4 4AB

[www.mcscertified.com](http://www.mcscertified.com)  
[hello@mcscertified.com](mailto:hello@mcscertified.com)  
0333 103 8130

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# ABOUT MCS

## Giving you confidence in home-grown energy

With energy costs constantly rising and climate change affecting us all, low-carbon technology has a bigger and bigger role to play in the future of UK energy.

We're here to ensure it's a positive one.

Working with industry we define, maintain and improve quality – certifying products and installers so people can have confidence in the low-carbon technology they invest in. From solar and wind, to heat pumps, biomass and battery storage, we want to inspire a new generation of home-grown energy, fit for the needs of every UK home and community.

### About

The Microgeneration Certification Scheme Service Company Ltd (MCSSCo Ltd) trades as MCS and is wholly owned by the non-profit MCS Charitable Foundation. Since 2007, MCS has become the recognised Standard for UK products and their installation in the small-scale renewables sector.

We create and maintain standards that allow for the certification of products, installers and their installations. Associated with these standards is the certification scheme, run on behalf of MCS by Certification Bodies who hold UKAS accreditation to ISO 17065.

MCS certifies low-carbon products and installations used to produce electricity and heat from renewable sources. It is a mark of quality. Membership of MCS demonstrates adherence to these recognised industry standards; highlighting quality, competency and compliance.

### Vision

To see MCS certified products and installations in every UK home and community.

### Mission

To give people confidence in low-carbon energy technology by defining, maintaining and improving quality.

### Values

1. We are expert – ensuring quality through robust technical knowledge
2. We are inspiring – helping to reshape energy in UK homes and communities
3. We are collaborative – working with industry and government to create positive change
4. We are principled – operating in a way that's clear, open and fair
5. We are determined – supporting the UK's drive towards a clean energy future

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# DOCUMENT PURPOSE

The purpose of this document is to detail the process to be followed when MCS Technical Standards (defined as those documents used for certification along with related guidance and tools) either require change or creation, from proposal through to publication.

## SCOPE

The scope of the Technical Document Control Process includes:

- a. Maintaining, updating or developing Technical Standards that relate to the technologies currently within the scope of MCS
- b. Development of Technical Standards for technologies that are new to the scope of MCS

## TYPES OF CHANGE

The process to be followed for making changes to MCS Technical Standards depends upon how the proposed change is categorised. There are four distinct categories that will attract different steps to affect a proposed change, some examples of such changes are given below:

- 1) **Critical change:** Changes required for Corporate or liability reasons.
- 2) **Non-Material change:** Changes which do not affect the meaning or intent of any requirements within the Technical Standards. Such changes could include typographical errors, updated layout, branding, and copyright information.
- 3) **Material change:** Changes which do or could affect the meaning or intent of any requirements within the Technical Standards.
- 4) **Material change to Technical Standards linked to Legislation:** As Material change but where the Standard, name and version number, is explicitly referenced in government legislation and where any change to the Standard would require a change to a statutory instrument.

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# THE TECHNICAL DOCUMENT CONTROL PROCESS

## CHANGE MANAGEMENT STRUCTURE

The processes outlined in this document is designed to empower the MCS Working Groups as the main authority on technical matters concerning the Technical Standards, allowing them to make changes quickly in response to market conditions and technological advancements. The Working Group Terms of Reference can be found on the MCS website. The process also includes a 'fast track' procedure for changes categorised as Critical.

The necessary oversight of these changes is provided by the MCS Approval Committee that is constituted to maintain the integrity and impartiality of the Scheme and as such oversee proposed changes and their implementation.

The Approval Committee shall:

- Confirm the categorisation of a proposed change (e.g. Critical, Material, Non-Material).
- Review whether a proposed change will have a negative impact on the Scheme, MCS Service Company or MCS Charitable Foundation, from a reputational, commercial or political perspective.
- Approve proposed changes, ensuring that all changes have followed the necessary steps in the Technical Document Control Process.
- Monitor and review progress of all approved changes and through the Secretariat, provide a status report that is visible to all Working Groups and the MCS Service Company Board.
- Provide feedback to Working Groups to help ensure resources are focussed on changes and issues which are relevant to that group's technology, and to ensure that one group does not commence work that clashes with that of another Working Group.
- Determine whether all feedback from members and external groups in response to a proposed change has been given appropriate consideration.
- Inform other Working Groups as appropriate via the Secretariat of proposed changes so that they may provide feedback.
- Instigate collaboration between Working Groups.
- If necessary, as with the case with technologies that are new to the scope of MCS, create a new Working Group.

Members of the Approval Committee shall be:

- An Independent Chair, reporting directly to the MCS Service Company Board i.e. not through the MCS operational delivery team.
- A representative of the MCS Secretariat, acting as the primary facilitator of this Technical Document Control Process and communication between Approval Committee and individual Working Groups.
- Representatives from the MCS operational delivery team to include one representative from each of the Operations, Compliance and Helpdesk functions.
- Representation from the MCS Charitable Foundation (optional and to provide further oversight).

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## TECHNICAL DOCUMENT CONTROL PROCESS

Proposed changes and their associated impact are to be supported by the Scheme's Change Request form.

This Document Control Process for Technical Standards assumes that a Change Request and associated Impact Assessment has been completed and that, for all but Critical changes, a majority view has been reached by the appropriate Working Group. Critical changes shall be approved by an MCSSCo Board member. Each Change Request once approved by the relevant Working Group or MCSSCo Board member as appropriate, shall be submitted for review to the Approval Committee, which operates as described [here](#).

**Step 1)** A proposed change approved by a Working Group(s) as indicated by a signed Change Request form either by the Working Group Chair or Deputy Chair, or for a Critical change approved and signed by an MCSSCo Board member, is submitted to the Approval Committee.

**Step 2a)** For Critical changes the Approval Committee will aim to respond within 2 working days and sooner if possible.

The Approval Committee will consider the appropriateness of the Critical category assigned to the Change Request, as described [here](#), and confirm that if appropriate the relevant Working Group Chair(s) has (have) been properly consulted regarding the proposed change.

If the Approval Committee is not satisfied with either the assignment of the Critical change category or the involvement of Working Group Chair(s), then the change will be referred back to the MCSSCo Board member via the Secretariat, with the Committee's explanation as to why this is the case.

**Step 2b)** For all but Critical changes the Approval Committee will aim to respond within 5 working days after satisfying itself that the Working Group has followed the correct process for the approval of the proposed change, including the evaluation of the associated Impact Assessment. The Approval Committee will also consider the appropriateness of the category assigned to the Change Request as described [here](#).

If the Approval Committee is not satisfied with either Working Group process adherence and/or the assigned category of change, then the change will be referred back to the Working Group via the Secretariat, with the Committee's explanation as to why this is the case.

If the Approval Committee is satisfied, then it shall provide approval to the Working Group to proceed via the Secretariat. From this point onwards the Working Group is empowered to proceed with the delivery of the change as proposed.

The Approval Committee can stipulate that certain conditions are to be met in delivering the change, including but not limited to, requesting that another Working Group or Groups be consulted on the change or that a public consultation is to be initiated. Evidence that these conditions have been met is to be provided to the Approval Committee.

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**Step 3)** Relates to the delivery of the change and is dependent upon the category of the change. These categories are described in the following sub-sections as alternatives in the overall process:

### **CRITICAL CHANGE**

**Step 3a)** The required work shall proceed as set out in the proposal by personnel agreed by the MCSSCo Board member that proposed the change.

No consultation is required.

### **NON-MATERIAL CHANGE FOR AN EXISTING MCS TECHNOLOGY**

**Step 3b)** The development work shall proceed as set out in the proposal by the agreed personnel.

If necessary, the Working Group Chair can choose to form a Sub Working Group, which will focus solely on delivering the proposed change, to be dissolved once the process has been completed.

In addition, the Secretariat can provide support to the Working Group to help establish who can complete the work associated with the Change Request and in securing a budget from the MCS Service Company to pay for this work, potentially via an Associate(s).

### **MATERIAL CHANGE FOR AN EXISTING MCS TECHNOLOGY**

**Step 3c)** The Secretariat will share the proposed change with all other Working Groups Chairs. Each Working Group will then have 5 working days to comment on the proposed change. If no feedback is received from a Working Group it is assumed that they have no issues with the proposed change.

All feedback from other Working Groups will then be consolidated by the Secretariat and returned to the Chair of the Working Group that proposed the change. The Working Group shall then review and address all the points raised in the feedback within 5 working days. If necessary, the Working Group should adjust the proposed change based on the feedback provided. If no adjustments are made, the Working Group should still provide acknowledgement that the feedback has been reviewed and given appropriate consideration by the Working Group.

The development work shall then proceed as set out in the proposed change by agreed personnel. If necessary, the Working Group Chair will form a Sub Working Group, which will focus solely on the proposed change and be dissolved once the process has been completed.

Once the work has been completed, the Technical Standard(s) updated as a result of the proposed change will be submitted to the Secretariat for public consultation. The time scale for public consultation shall be decided between the Working Group and the Secretariat.

All feedback from the public consultation will be consolidated by the Secretariat and returned to the Working Group Chair. The Working Group shall then review and address all the points raised in the feedback. If necessary, the Working Group should make further updates to the Technical Standard(s) based on the feedback provided. If no further updates are made, the Working Group should still provide acknowledgement that the feedback has been reviewed and given appropriate consideration by the Working Group.

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## **MATERIAL CHANGE INVOLVING A TECHNOLOGY NEW TO MCS**

**Step 3d)** For technologies new to MCS an outline proposal shall be submitted to the Board of Directors of MCS Service Company Ltd which may request a detailed business case for consideration. Approval of such proposals is at the sole discretion of the Board.

It shall be determined by the Board if a new Working Group should be formed or if the new technology is closely related to an existing technology such that ownership of new Technical Standard(s) should be assigned to an existing Working Group. If a new Working Group is formed a Chair and Deputy Chair shall be appointed.

Proposals for the development of Technical Standards shall be submitted to the Working Group Chair, with all supporting documentation and an Impact Assessment, by a member or members of the Working Group.

The Secretariat will share the proposed change with all other Working Group Chairs. Each working group will then have 5 working days to comment on the proposed change. If no feedback is received from a Working Group it is assumed that they have no issues with the proposed change.

All feedback from other Working Groups will then be consolidated by the Secretariat and returned to the Chair of the Working Group that proposed the change. The Working Group shall then review and address all the points raised in the feedback within 5 working days. If necessary, the working group should amend the proposed change based on the feedback provided. If no amendments are made, the Working Group should still provide acknowledgement that the feedback has been reviewed and given appropriate consideration by the Working Group.

The development work shall then proceed as set out in the proposal by agreed personnel. Once the work has been completed, the new Technical Standard(s) will be submitted to the Secretariat for public consultation. The time scale for public consultation shall be agreed between the Working Group and the Secretariat.

All feedback from the public consultation will then be consolidated by the Secretariat and returned to the Working Group Chair. The Working Group shall then review and address all the points raised in the feedback. If necessary, the Working group should amend the Technical Standard(s) based on the feedback provided. If no amendments are made, the Working Group should still provide acknowledgement that the feedback has been reviewed and given appropriate consideration by the Working Group.

## **MATERIAL CHANGE TO MCS TECHNICAL STANDARDS LINKED TO LEGISLATION**

**Step 3e)** The Secretariat and / or representatives of the Approval Committee shall consult as to the proposed change with the relevant government department in advance of any change being made.

Assuming there are no objections from the relevant government department in relation to the proposed change that cannot be resolved, the development work shall proceed as set out in the proposal by agreed personnel. A timetable for change to coordinate with the required change to legislation shall be agreed between the Approval Committee, Working Group, and the relevant government department.

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The Secretariat will share the proposed change with all other Working Groups Chairs. Each Working Group will then have 5 working days to provide feedback on the proposed change. If no feedback is received from a Working Group it shall be assumed that they have no issues with the proposed change.

Feedback from all other Working Groups will then be consolidated by the Secretariat and returned to the Chair of the Working Group that proposed the change. The Working Group should then review and address all the points raised in the feedback within 5 working days. If necessary, the Working group should amend the proposed change based on the feedback provided. If no amendments are made, the Working Group should still provide acknowledgement that the feedback has been reviewed and given appropriate consideration by the Working Group.

The development work shall then proceed according to the proposal by agreed personnel. If necessary, the Working Group Chair will form a Sub Working Group, which will focus solely on the proposed change. This sub-group shall be dissolved once the Technical Document Control Process has been completed.

Once the work has been completed, the proposed change will be submitted to the Secretariat for public consultation. The time scale for public consultation shall be decided between the Working Group and the Secretariat.

All feedback from the public consultation will then be consolidated by the Secretariat and returned to the Working Group Chair. The Working Group shall then review and address all the points raised in the feedback. If necessary, the Working group should amend the Technical Standard(s) based on the feedback provided. If no amendments are made, the Working Group should still provide acknowledgement that the feedback has been reviewed and given appropriate consideration by the Working Group.

A transition and / or alignment phase shall be put in place for material changes to Technical Standards that are linked to legislation.

## **FINAL STEPS FOR ALL TECHNICAL DOCUMENT CONTROL PROCESSES**

**Step 4)** Once the work has been completed, but before final publication, the change will be submitted to the Approval Committee by the Working Group Chair. The Approval Committee will determine if the Technical Document Control Process has been followed correctly at all stages. For Critical changes, the results of the review will be returned to the MCSSCo Board member within 2 working days and sooner if possible. For all other changes the results of the review will be returned to the relevant Working Group Chair within 5 working days. Any issues or concerns raised by the Approval Committee should be addressed by the MCSSCo Board member or Working Group and evidence of this submitted to the Approval Committee before final publication.

**Step 5)** If no concerns are raised by the Approval Committee or all previous concerns have been addressed, then the updated Technical Standard(s) shall be published. If recommended in the Impact Assessment and agreed by the proposer and Working Group Chair, for all but Critical changes, a transition phase will be put in place. At the end of the transition phase any superseded Standards shall be archived.

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# APPENDIX 1: MCS TECHNICAL DOCUMENT CONTROL PROCESS FLOWCHART

## Approval Committee – Managing Proposed Changes



## APPENDIX 2: CHANGE REQUEST FORM WITH IMPACT ASSESSMENT

Change Request number	
Date Change Request raised	
Change Request raised by	
Title of Change Request	
Type of Change (i.e. Critical / Material / Non-Material/ Linked to legislation)	
Response by	
Details of Change Request including work plan	
Justification for Change Request / Description of Issue	

Intended Outcome and Implementation Timeline	
Alternative Options Considered	
Impact Assessment (including resource, costs, admin)	
Industry	
Consumers	
Scheme	
Others	

Cost (to industry) / Benefit Analysis	
Regulatory Risks Considered	
Proposed number of meetings required	
Completion date	
Print Name of proposer	
Signature of proposer	
Print Name of MCSSCo Board member/ WG Chair	
Signature of MCSSCo Board member/ WG Chair	

## AMENDMENTS ISSUED SINCE PUBLICATION

Version no.	Approval	Amendment details	Date
1.0	Approved	First Issue	12/03/2013
2.0	Approved	Updated for the replacement of the brand elements including fonts and logos	19/06/2019
3.0	Approved	Updated to reflect the new Standards Management oversight incorporating the MCS Approval Committee	10/11/2020
4.0	Approved	Updated document name to MCS Technical Document Control Process. Updated MCS office address and clarified scope of the document.	12/08/2024