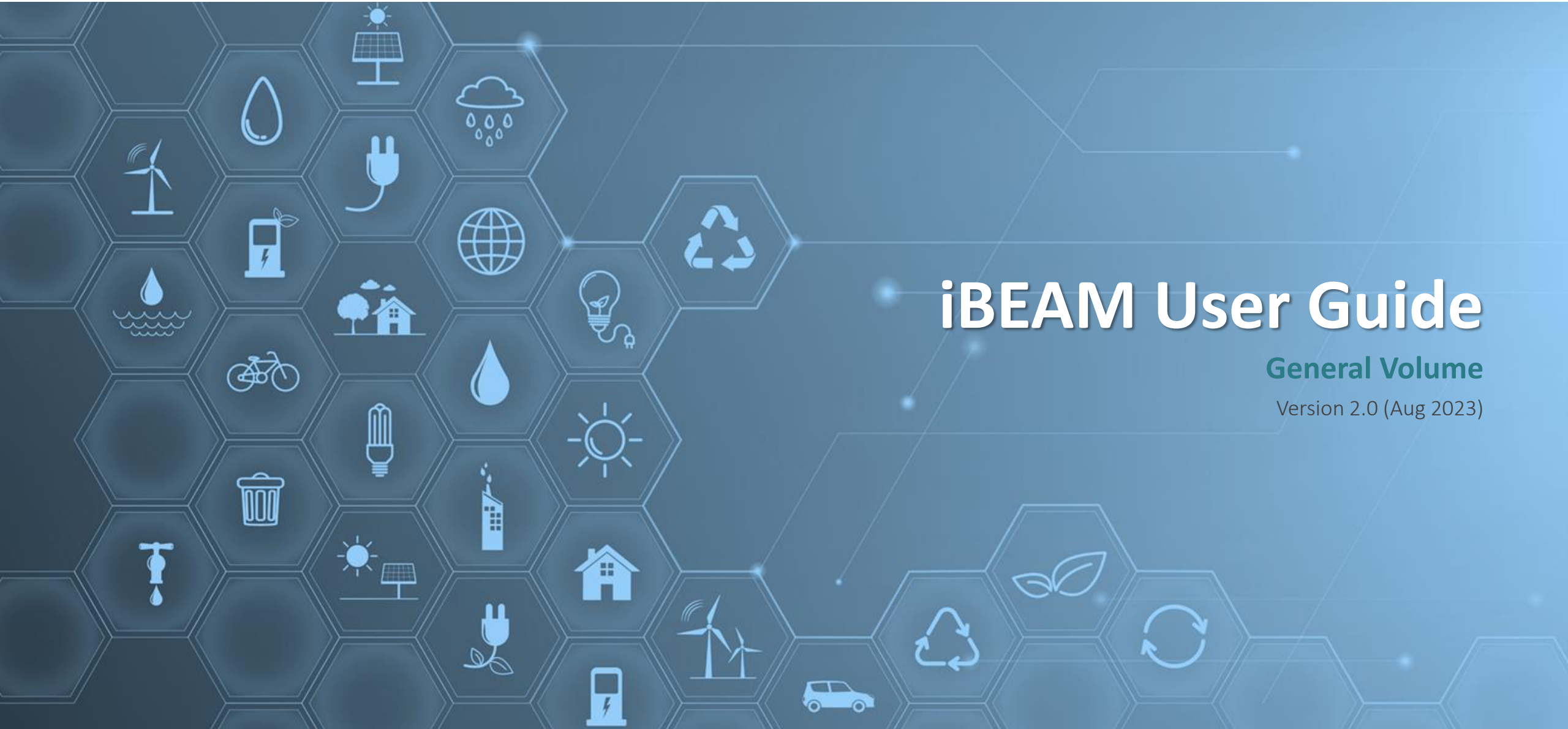
BEAM
建築環保評估協會

iBEAM



iBEAM User Guide

General Volume

Version 2.0 (Aug 2023)

Change Log

Version	Publication Date	Details of Update
Version 2.0	01 Aug 2023	1. Minor amendment to steps under Section A1.2 to A1.6, A2.1 to A2.3, A3.1, A4.1, A5.1, A5.3, A5.4, A5.7 and A5.8 2. Revamp of content in Section A3 and A7 3. Update of Section A5 to include BEAM Plus EB v.2.0 Portfolio Assessment (MAN & EU) 4. Addition of Section A1.8, A3.3, A3.4, A5.9, A6.1, A7.3 and Appendix D 5. Minor updates to steps under Section A3.2, A3.3, A4.2 and A5.3
Version 1.0	18 June 2021	1. Addition of Section A7 2. Minor amendment to steps under Section A5.4, A5.5, A5.6, A5.8 and A6.1 3. Minor updates of screen capture for selective flow under Section A5 4. Renaming of overriding function to pre-approved condition function
Initial Version	13 May 2021	1. Initial publication of this document

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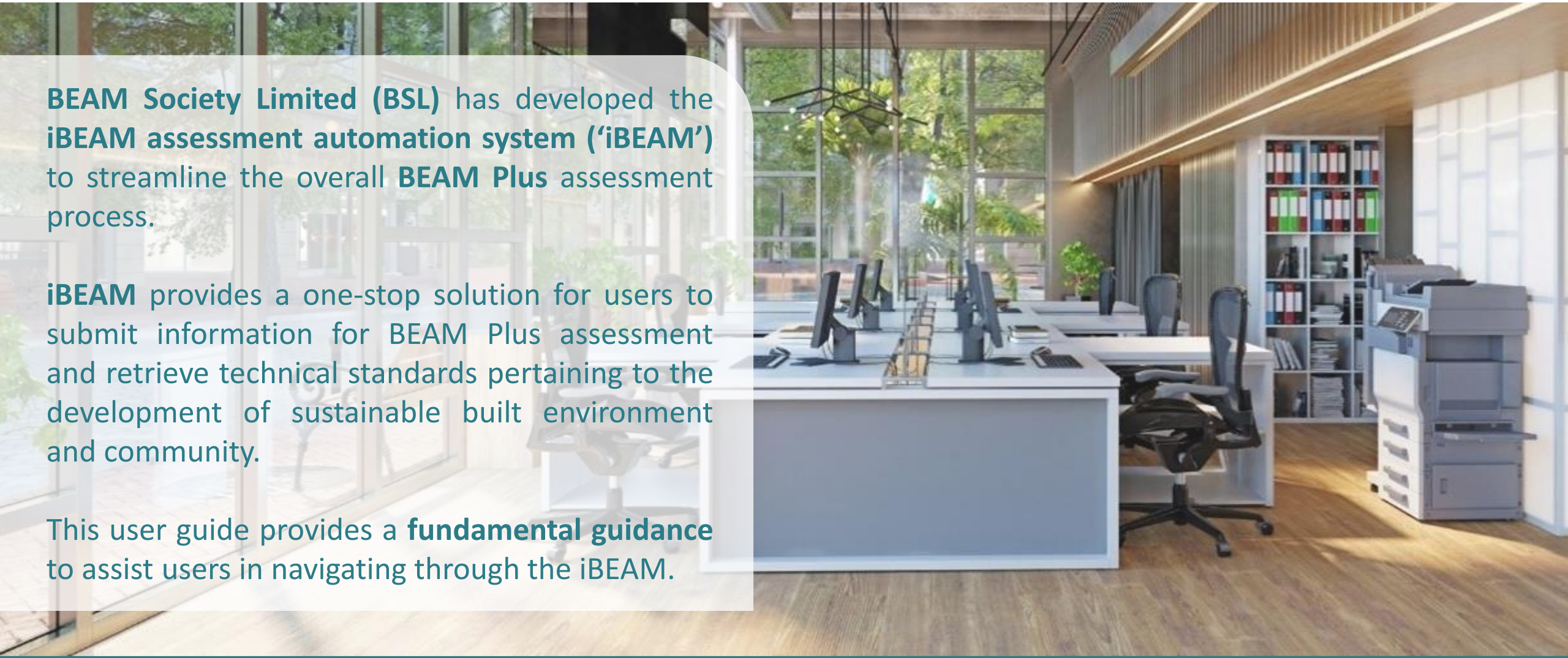
Preface



BEAM Society Limited (BSL) has developed the **iBEAM assessment automation system ('iBEAM')** to streamline the overall **BEAM Plus** assessment process.

iBEAM provides a one-stop solution for users to submit information for BEAM Plus assessment and retrieve technical standards pertaining to the development of sustainable built environment and community.

This user guide provides a **fundamental guidance** to assist users in navigating through the iBEAM.

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System Requirement

Desktop

CPU: Intel Core i3-3220 Processor or above
RAM: 4GB or above
Hard disk: 200GB or above
Best viewed resolution: 1280 × 720 to 1600 × 1200
Operating System: Microsoft Windows 7 or above
Browser: Chrome or Microsoft Edge (chromium based)
HTML version: HTML5
Encryption: TLS 1.2
JavaScript: Enabled
Cookies: Enabled
Chinese Character Support: Hong Kong Supplementary Character Set (HKSCS-2008)

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How To Use This Guide

Overview

Each section of this user guide shall consist of the following guiding notes to assist users in understanding the different features and functions of the iBEAM

1. Narration describing a certain function or step to a process
2. Screen capture of a particular feature or function
3. Tips to enhance the user experience in using the feature or function
4. *Where applicable*, the annotation of user groups or assessment scheme applicable to the process

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How To Use This Guide

User Groups and Assessment Tools Annotation

The definition for the annotation of user groups and assessment tools are stated below.

BSL Secretariat

- ALL — All User Groups
- A&F — Administration and Finance
- DTSS — Development & Technical Secretariat Section
- PAS — Project Assessment Section
- TCS — Technical Checking Section
- MKT — Marketing Section
- SDD — System Administrator

Expert Group

- BAS — BEAM Assessor (BAS)
- EXP — Expert Panel Members
- ASC — ASC Members

Assessment Scheme

- ALL — All Assessment Tool
- NB 2.0 — BEAM Plus New Buildings v.2.0
- EBP 2.0 — BEAM Plus EB v.2.0 Portfolio Assessment (MAN & EU)

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Disclaimer

iBEAM was developed with the assistance and participation of many individuals and representatives from various organisations. The outcome represents a general consensus, but unanimous support from each and every organisation and individual consulted is not implied. iBEAM shall be revised on a regular basis and as frequently as necessary. BSL reserves the right to amend, update and change any of the system functions on iBEAM from time to time without prior notice. Where changes in regulations necessitate changes to the assessment criteria, they will be issued to all parties involved in an assessment and will be announced on both the BSL's website and the iBEAM Assessment Automation System. An appropriate transitional period shall be allowed for projects undergoing assessment process.

It should be noted that none of the parties involved in the funding of iBEAM, including BSL and its members, provide any warranties or assume any liability or responsibility to the users of BEAM, or any third parties for the accuracy, completeness or use of, or reliance on, any information contained in iBEAM, or from any injuries, losses, or damages arising out of such use or reliance.

As a condition of use, users covenant not to sue, and agree to waive and release BSL and its members from any and all claims, demands and causes of actions for any injuries, losses and damages that users may now or hereafter have a right to assert against such parties as a result of the use of, or reliance of iBEAM.

If you have any questions on the usage of iBEAM, please contact BSL through one of the following means:

Call us at +852 3610 5700

Send e-mail to assessment_automation@beamsociety.org.hk

Send enquiry using the ask iBEAM function on iBEAM at https://ibeam.hk

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Acknowledgement

The **design**, **development** and **operational management** of iBEAM was led by a pool of industry practitioners, experts and in-house professionals. Industry stakeholders have been consulted through engagement workshops and Xperience studio for feedback and opinion. The various committees and project teams comprise:

Project Steering Committee
Sr Frankie SO (Chairperson), Dr. Benny CHOW, Ir Colin CHUNG, Ir Sai King HO, Ir Chi Fung LEUNG, Dr. Dennis MUI, Mr. Kai Ming SO, Mr. Terry WONG, Mr. David YAU, Mr. Alex LEE (Advisor) and Mr. Michael PANG (Advisor)

Roll Out Taskforce
Sr Frankie SO (Convenor), Ir Walter AU, Mr. Pak Cheung CHAN, Dr. Tin Cheung CHEUNG, Dr. Benny CHOW, Mr. Ivan FU, Sr Nelson HO, Ir Sai King HO, Mr. Tony IP, Mr. Man Kit LEUNG, Mr. Kai Ming SO, Ms. Ellie TANG, Dr. Kenneth TANG, Dr. Winnie TANG and Ir Sr Martin WAN

Design, Development Management Team
Ir CS HO, Mr. Tim LO, Mr. Icarus AU, Mr. Darren FOK, Ms. Helen YIP, Ms. Priscilla LIU and Ms. Minnie LUI

Operational Management Team
Ir CS HO, Mr. Tim LO, Mr. Icarus AU, Ms. Priscilla LIU, Mr. Jeff CHAN and Ms. Kiona CHAN

In-House User Group
Development & Technical Secretariat Section, Finance Section, Information Technology Section, Project Assessment Section, Technical Checking Section, Training & Marketing Section

Information Technology Services Provider
Global Technology Integrator Ltd.

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Table of Content General Functions (I)

Section A1 General Navigation

Section A2 Account Management

Section A3 Contract and Finance

Section A4 Credit Interpretation Request (CIR)

Section A5 Project Submission

Section A6 Enquiry

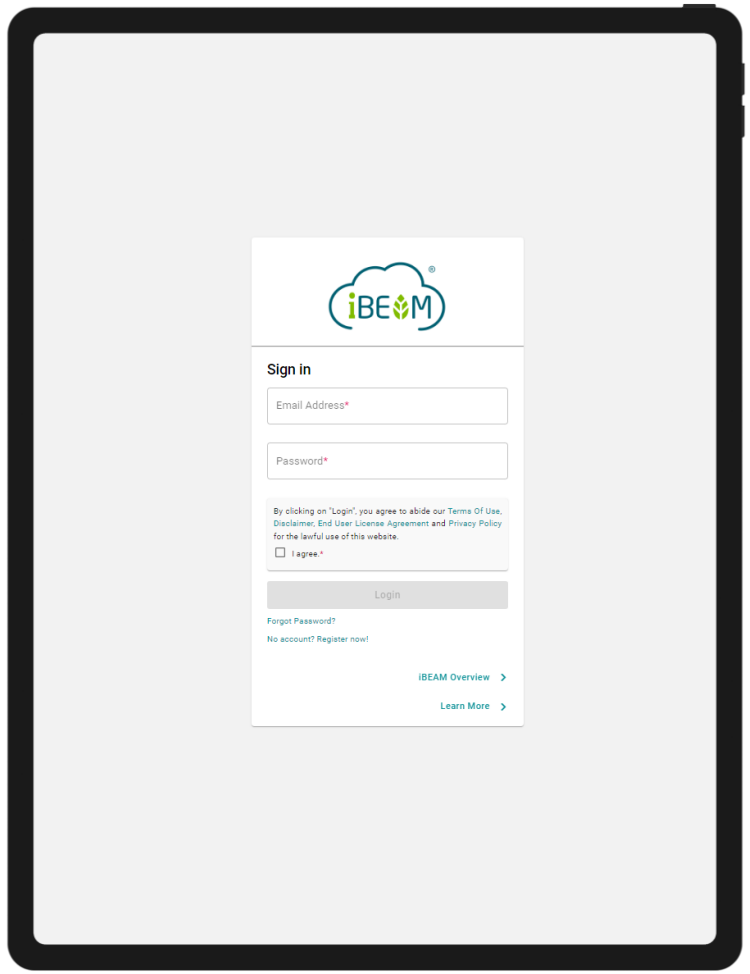

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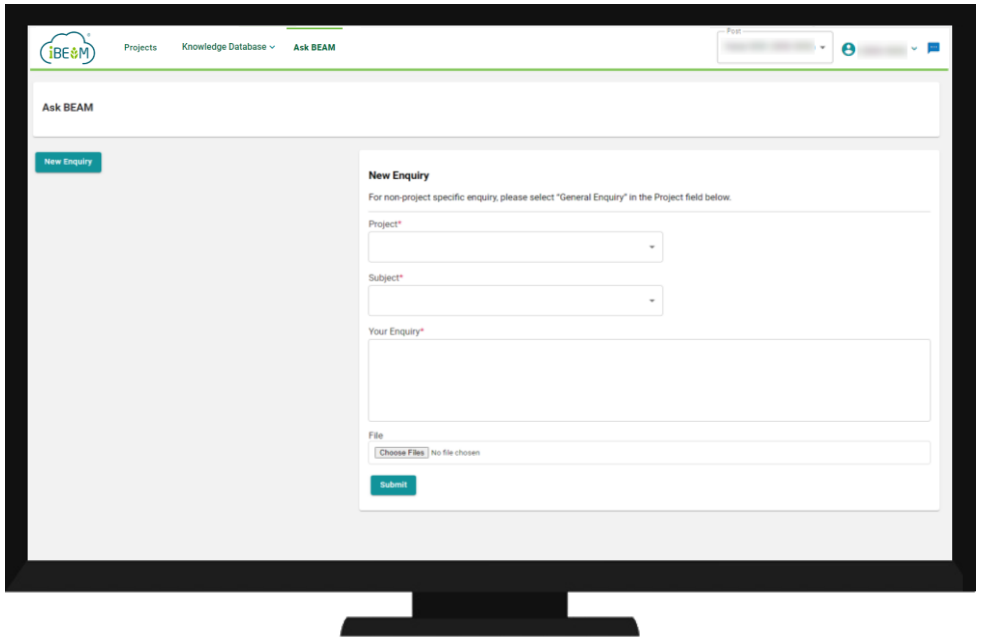
Table of Content General Functions (II)

Section A7 Knowledge Database



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Section A1 General Navigation

This section provides an overview of the different functions available on the iBEAM.

A1.1 Overall Site Map

A1.2 Login Page

A1.3 Navigation Bar

A1.4 Account Dashboard

A1.5 Project Dashboard

A1.6 Credit Summary Dashboard

A1.7 e-Form

A1.8 Newsfeed

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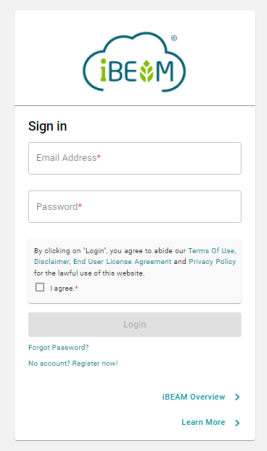
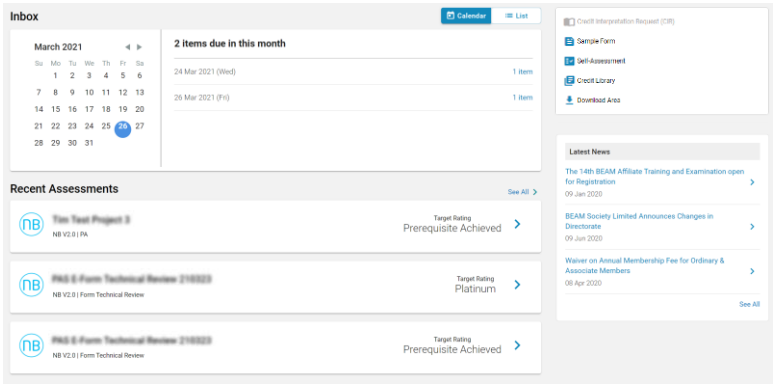
A1.1.1 Overall Site Map



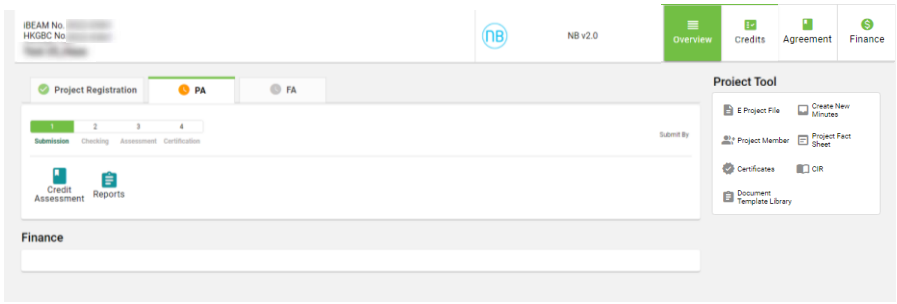


2 Account Dashboard^

Refer to Section A1.4

1 Login Page

Refer to Section A1.2



3 Project Dashboard^

Refer to Section A1.5

Continue onto Section A1.1.2

^Navigation bar is shown on top of these pages. For details, please refer to Section 1.3

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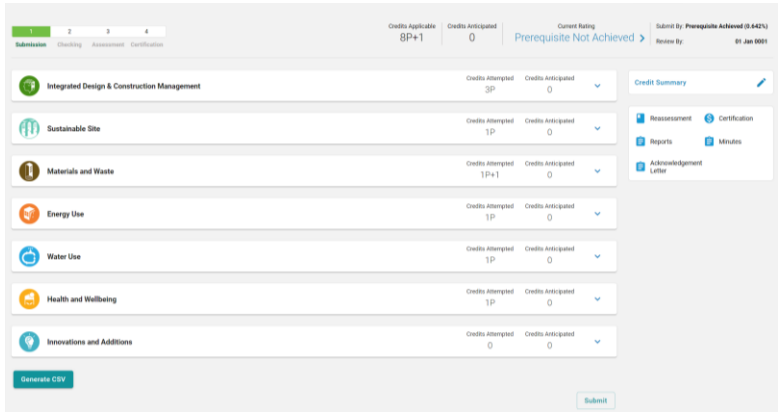
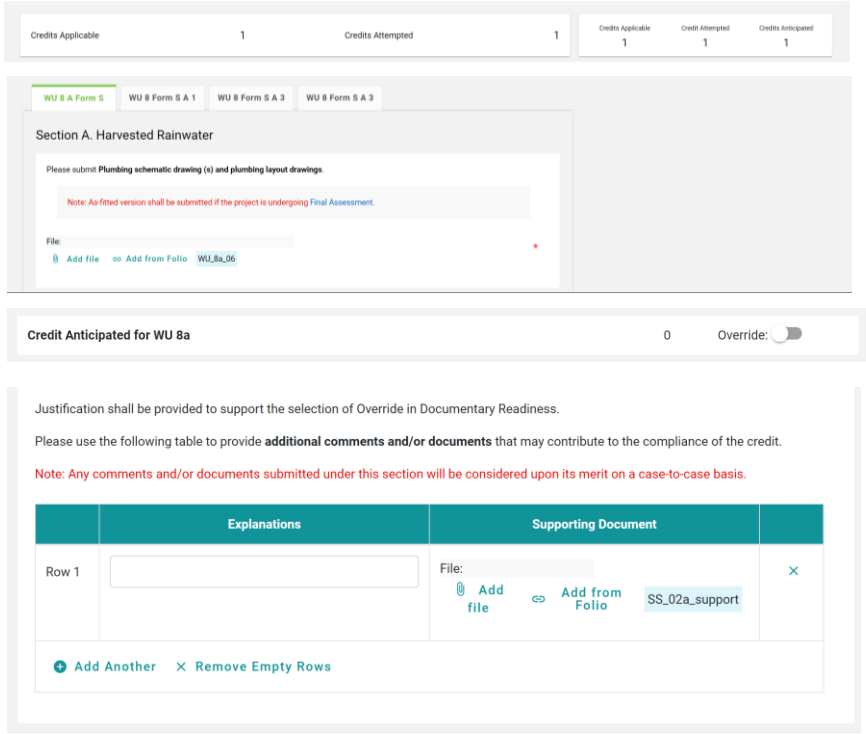
A1.1.2 Overall Site Map

Continue from Section A1.1.1



4 Credit Summary Dashboard^

Refer to Section A1.6



5 e-Form of Individual Credit^

Refer to Section A1.7

^Navigation bar is shown on top of these pages. For details, please refer to Section 1.3

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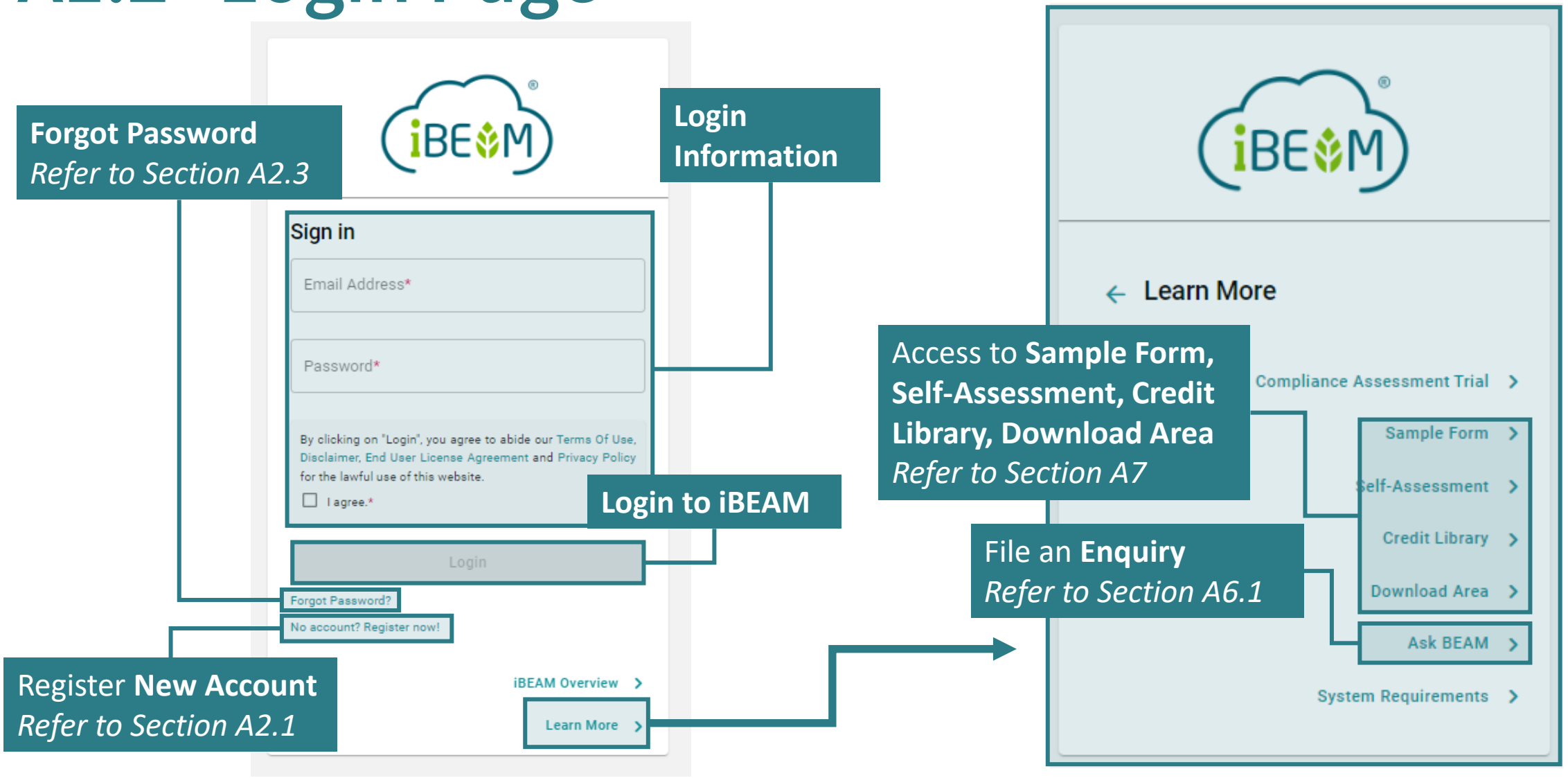
A1.2 Login Page



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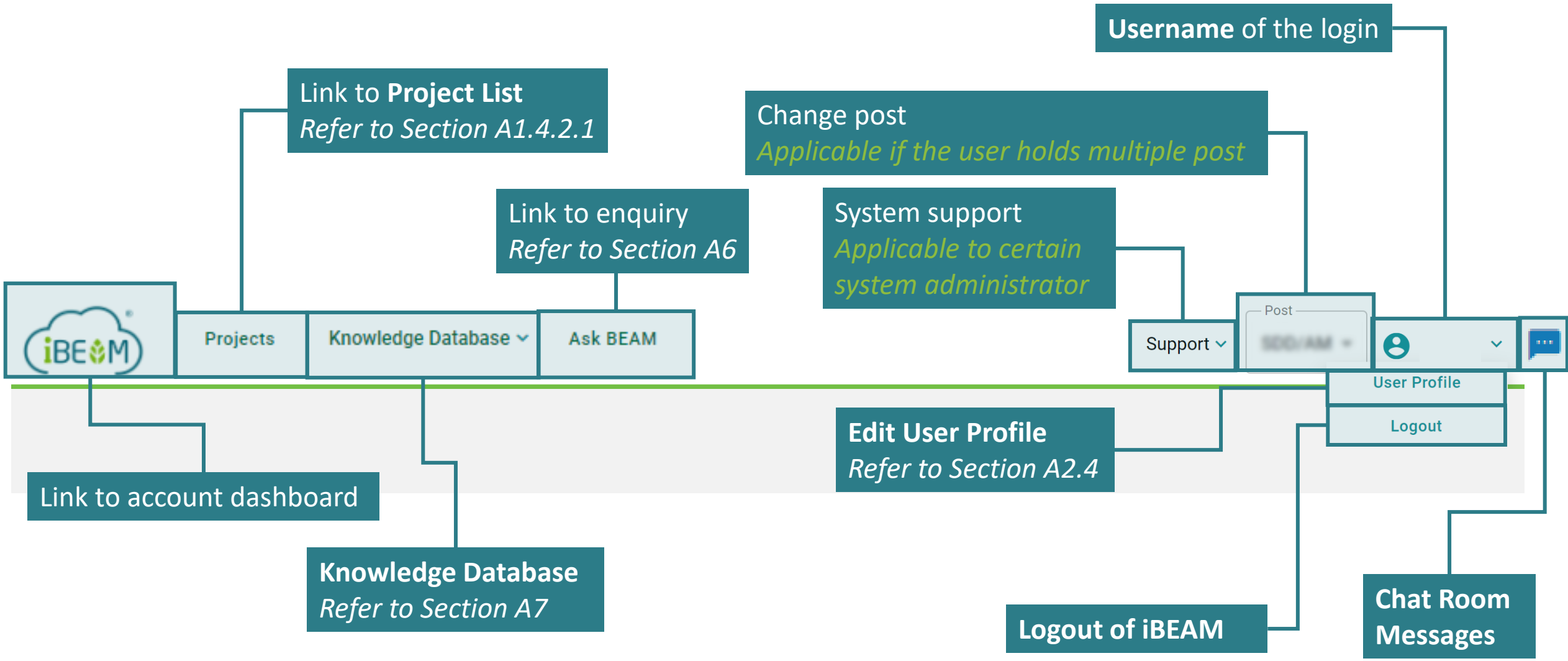
A1.3 Navigation Bar



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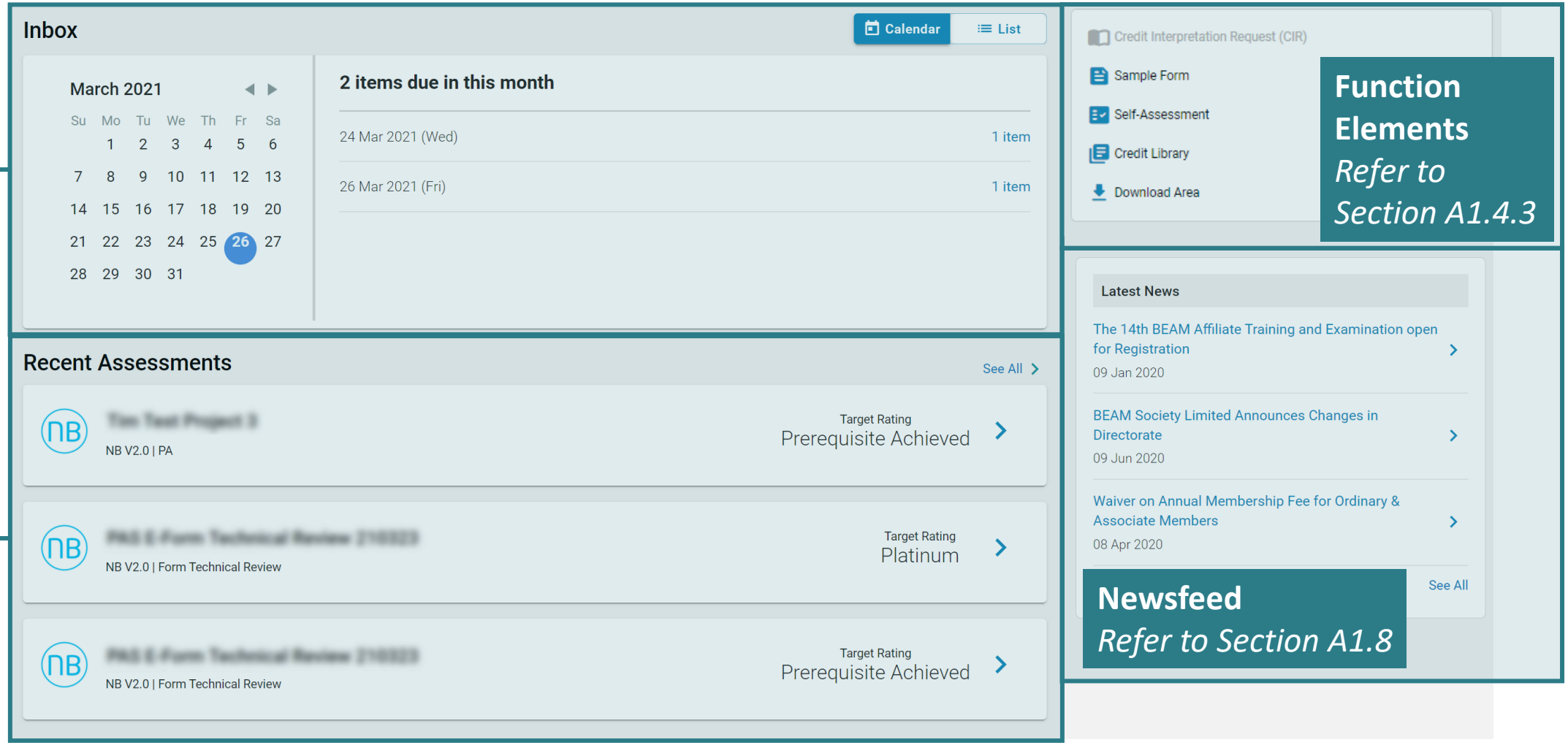
A1.4 Account Dashboard

Inbox
Refer to Section A1.4.1

Recent Assessments
Refer to Section A1.4.2



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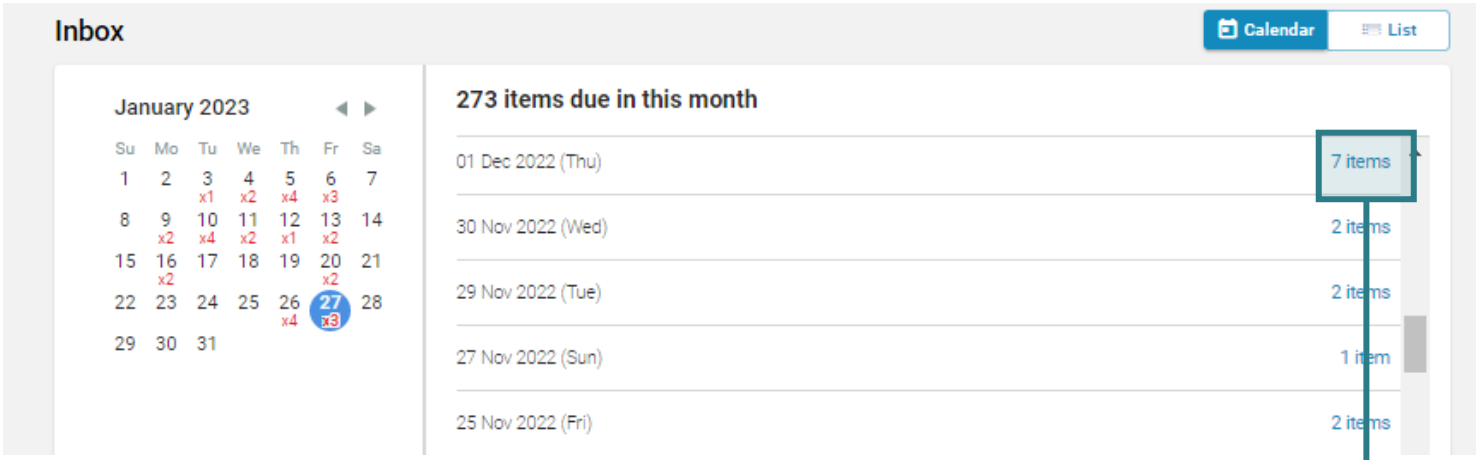
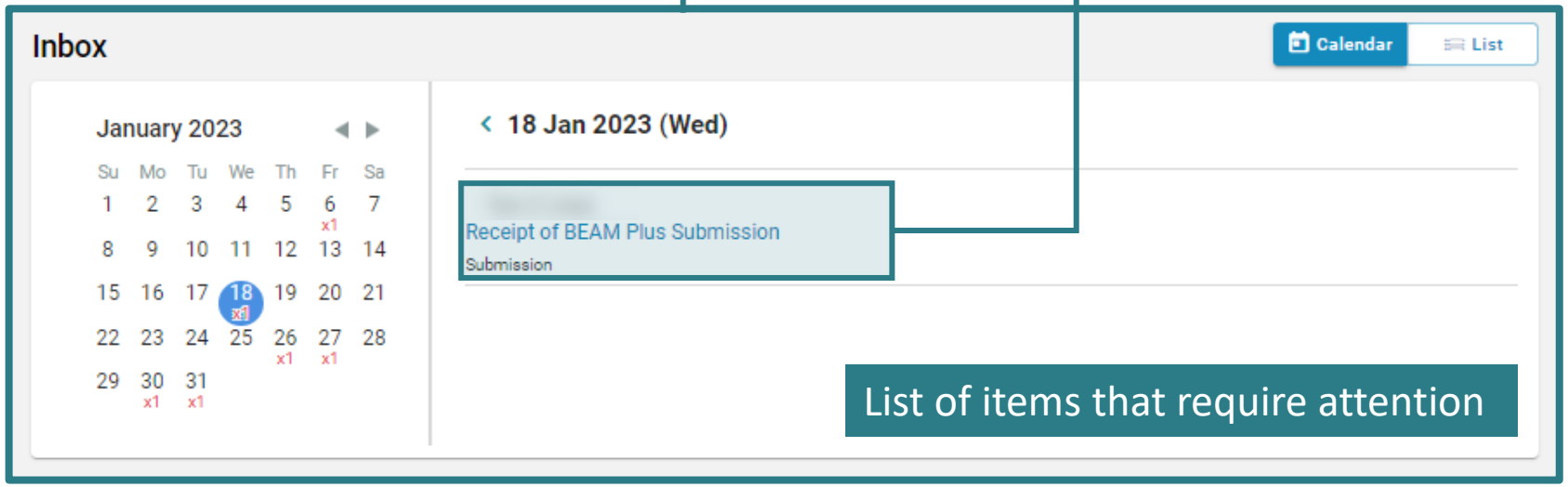
A1.4.1.1 Inbox

Calendar View



Link to individual item that requires attention



List of items that require attention

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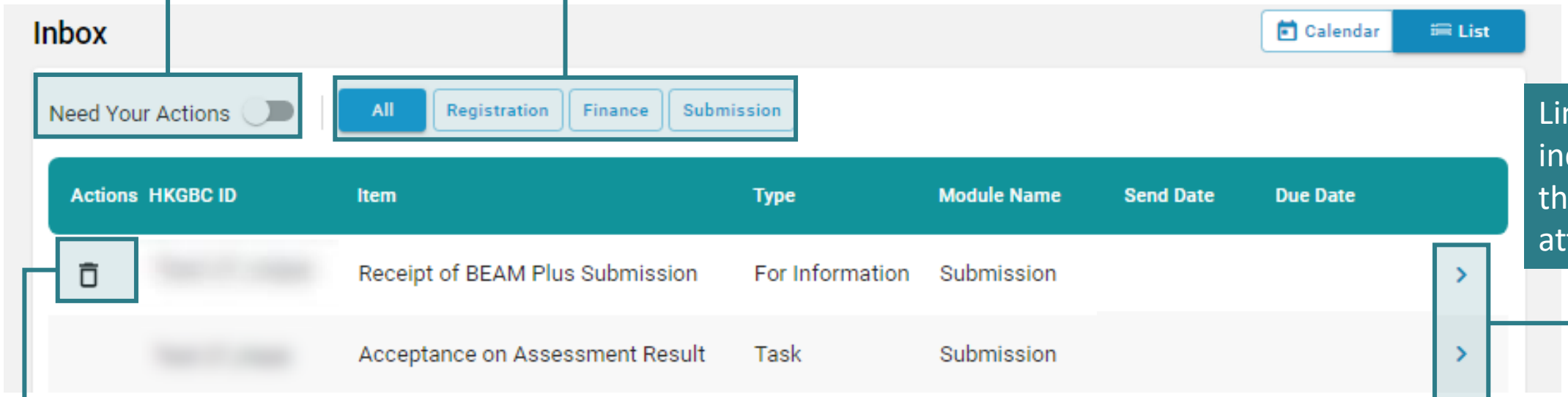
A1.4.1.2 Inbox

List View

Sorting of items that require the users' actions

Sorting of items that require attention by project stage



Link to individual item that requires attention

Delete item for information item

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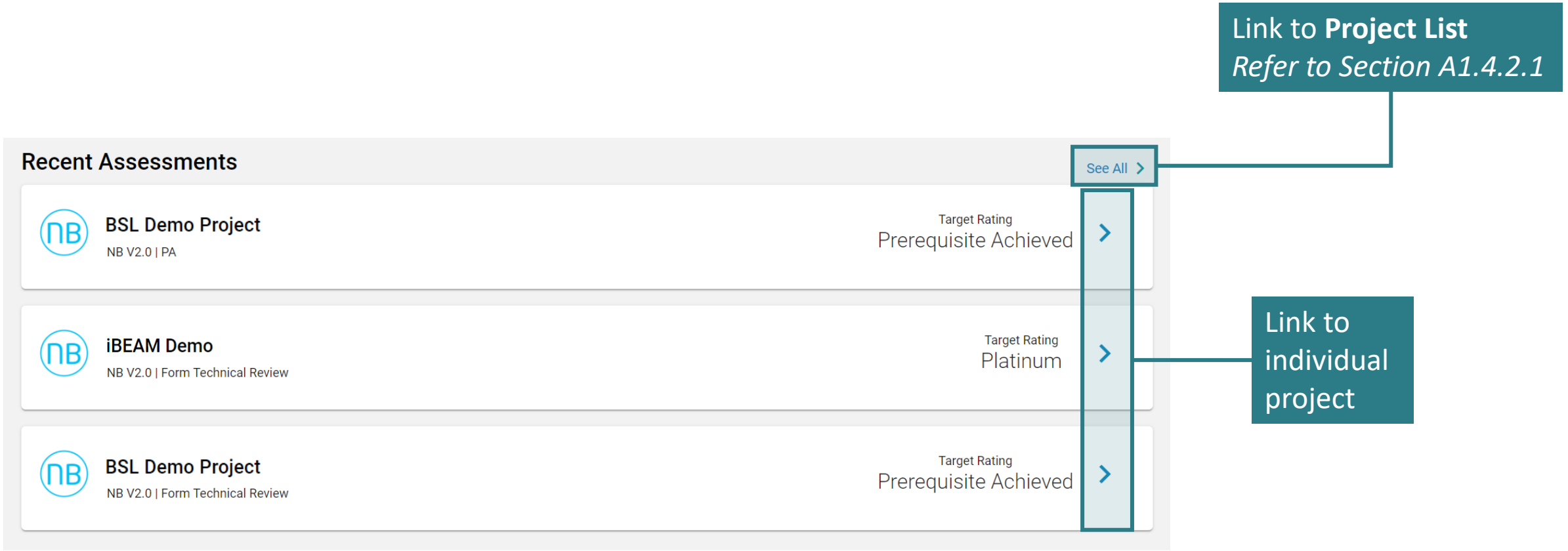
A1.4.2 Recent Assessments



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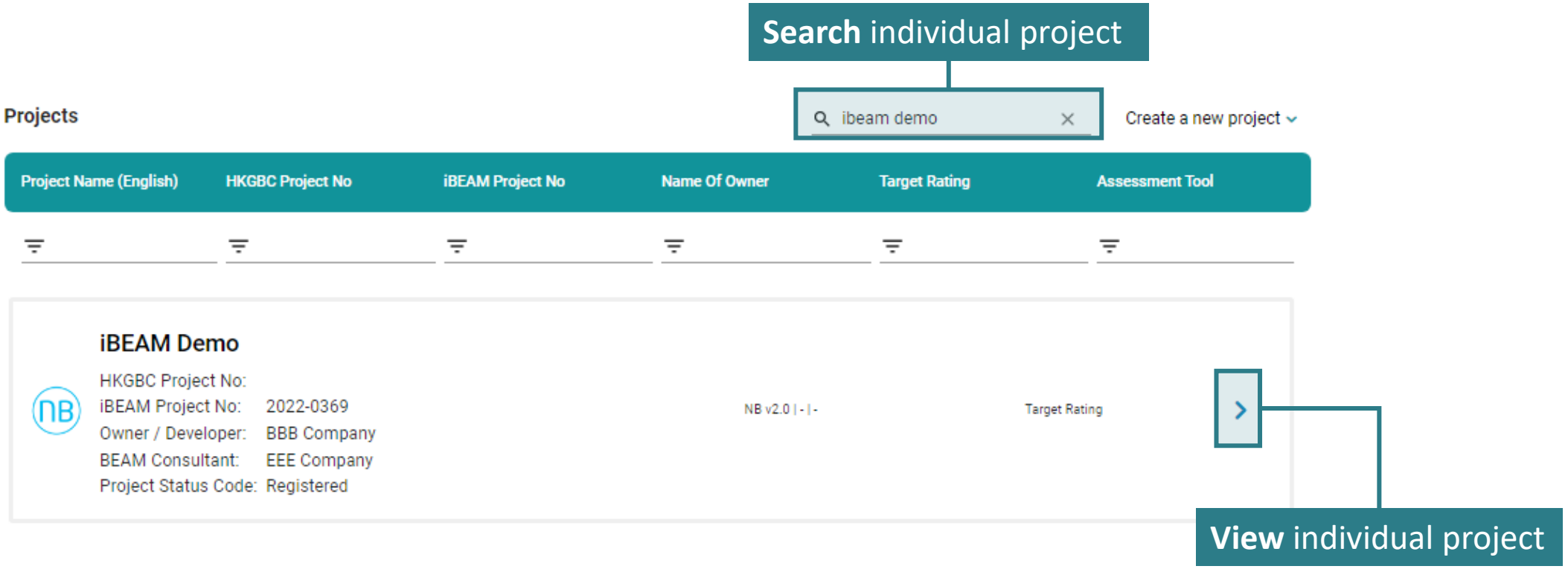
A1.4.2.1 Project List



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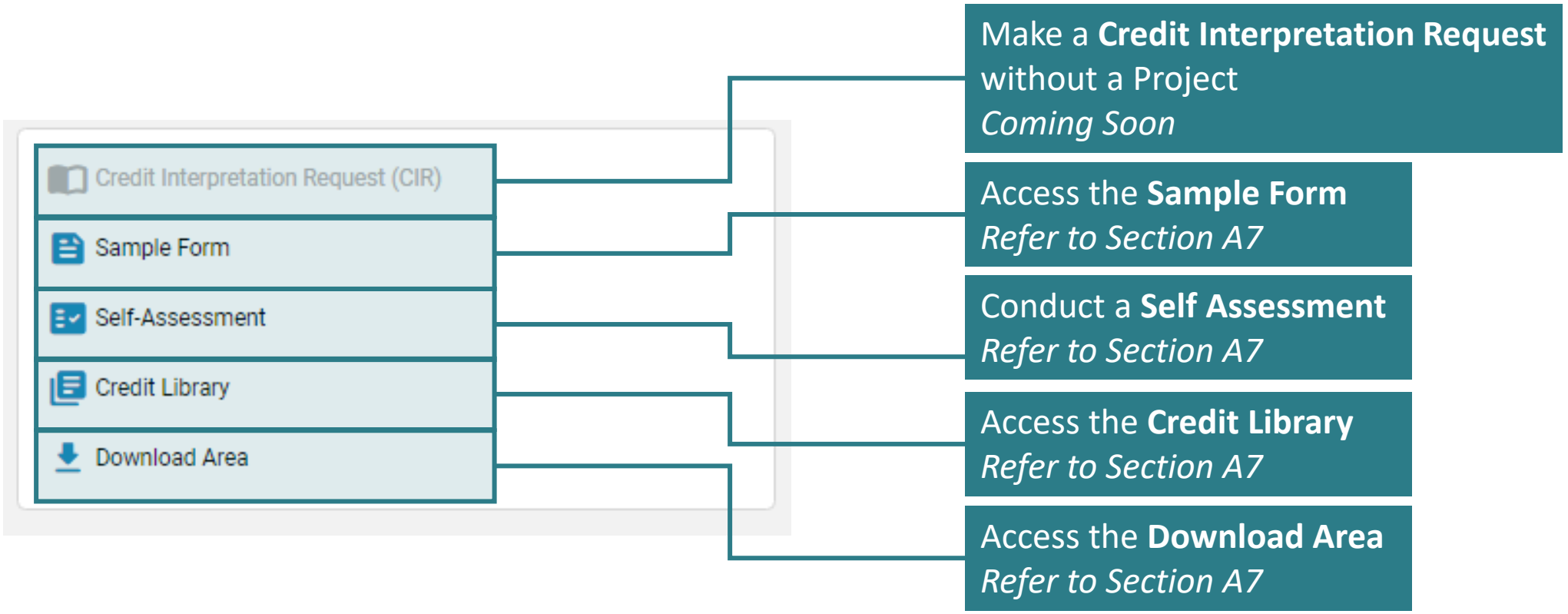
A1.4.3 Account Function Element



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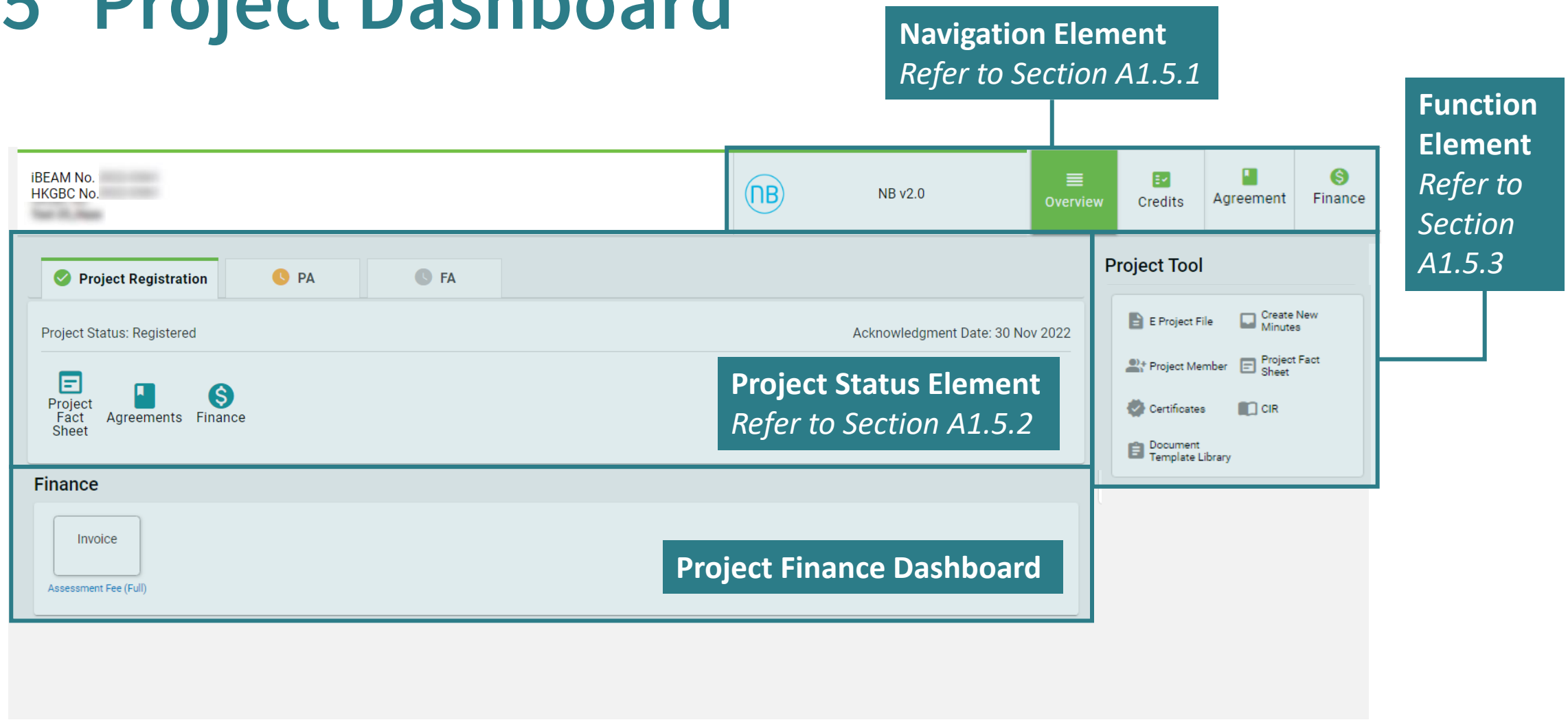
A1.5 Project Dashboard



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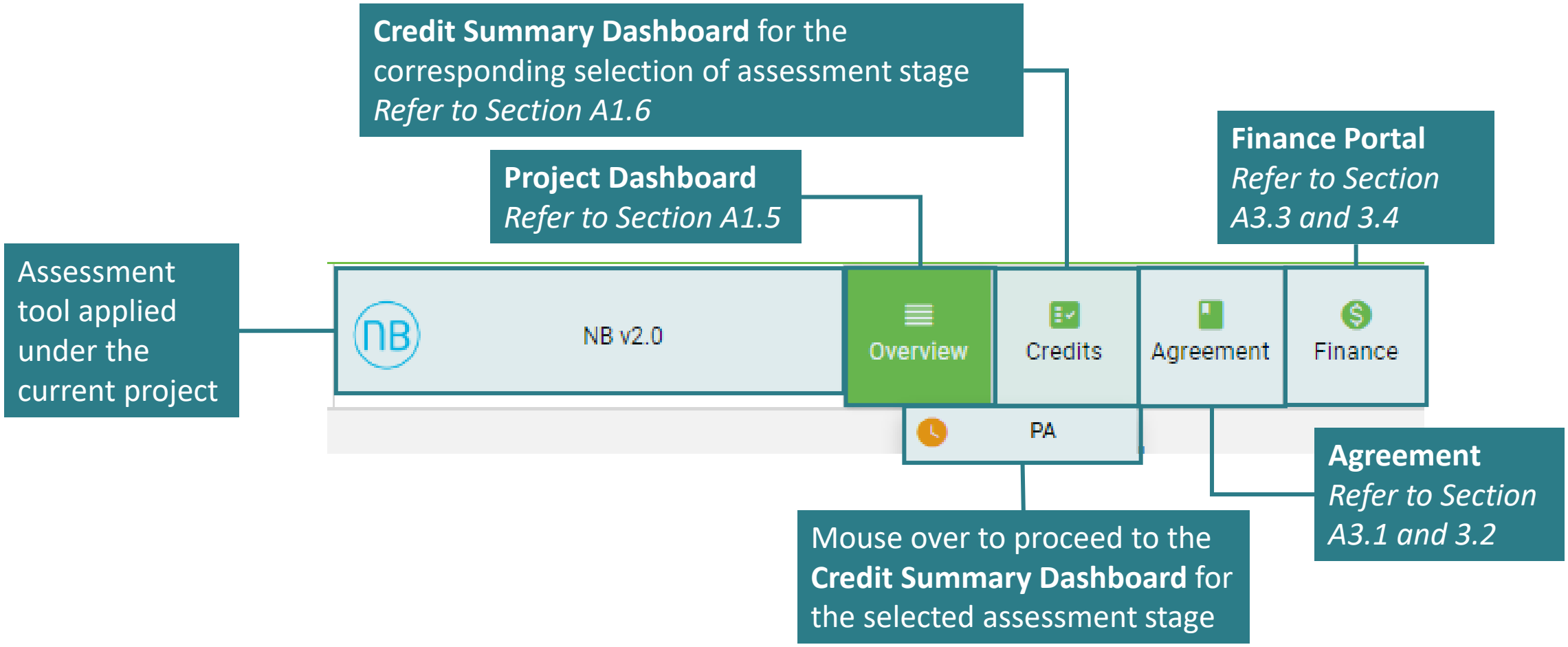
A1.5.1 Project Dashboard

Navigation Element



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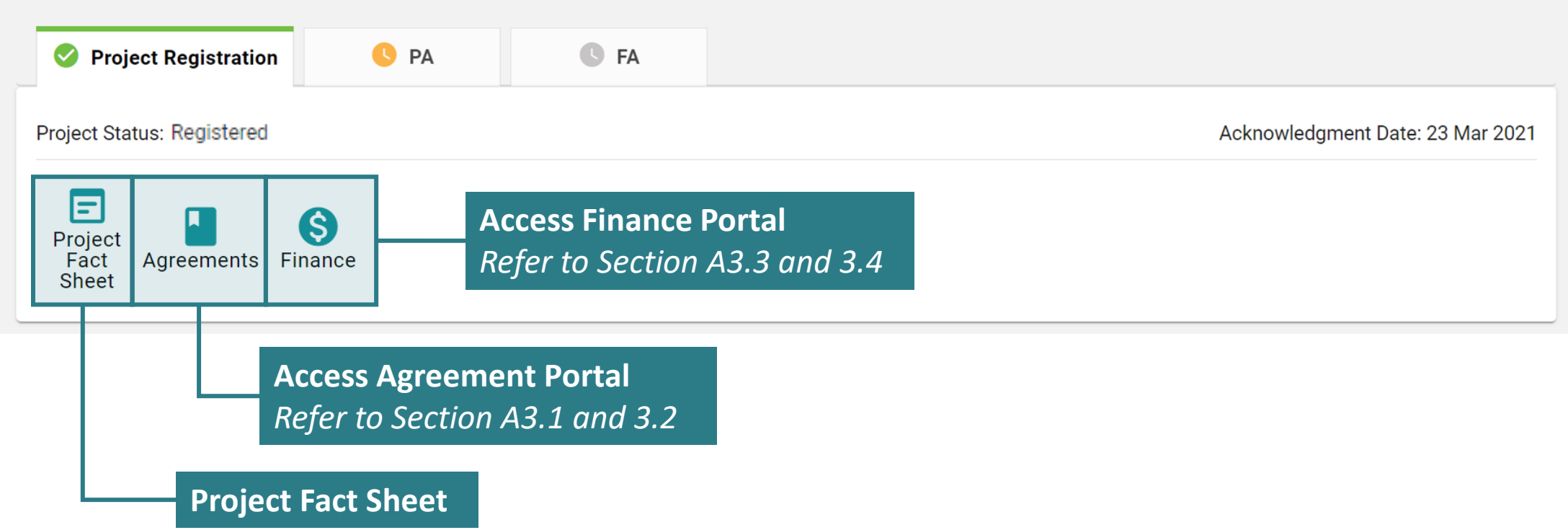
A1.5.2.1 Project Dashboard

Project Status Element – Project Registration Tab



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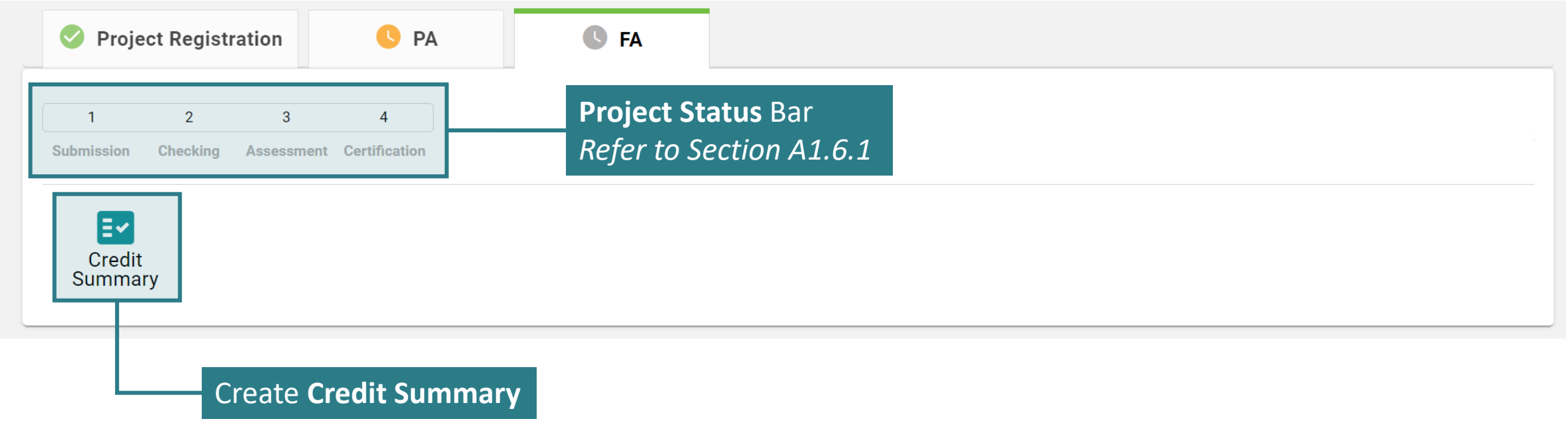
A1.5.2.2 Project Dashboard

Project Status Element – Assessment Tab (Credit Summary NOT YET Created)



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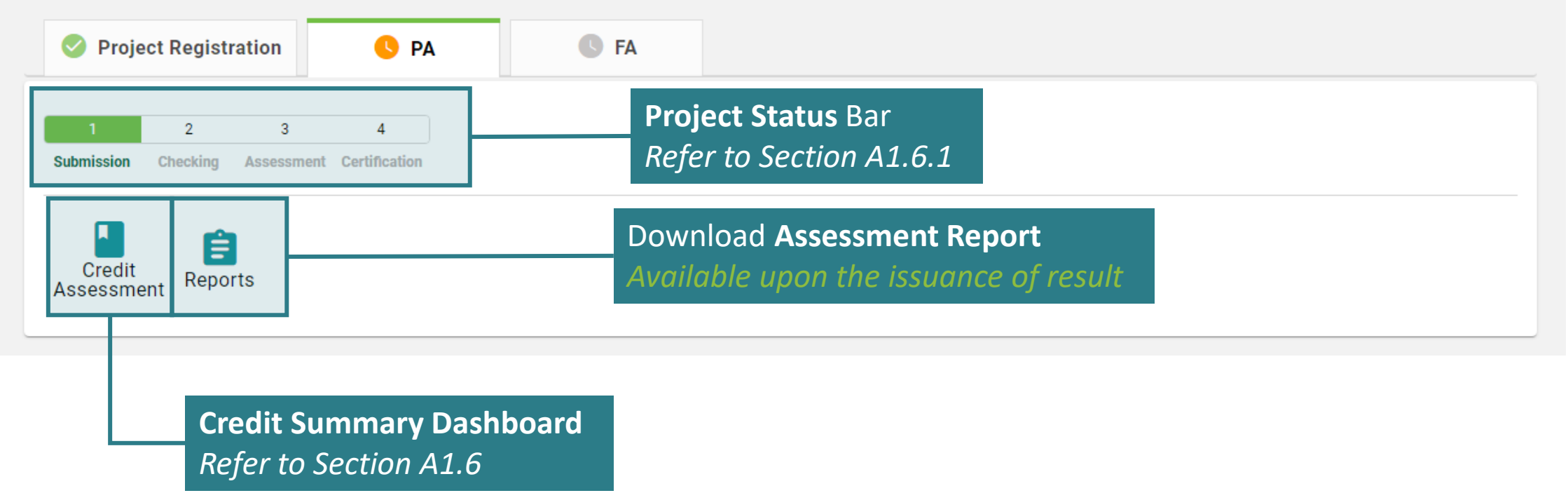
A1.5.2.3 Project Dashboard

Project Status Element – Assessment Tab (Credit Summary Created)



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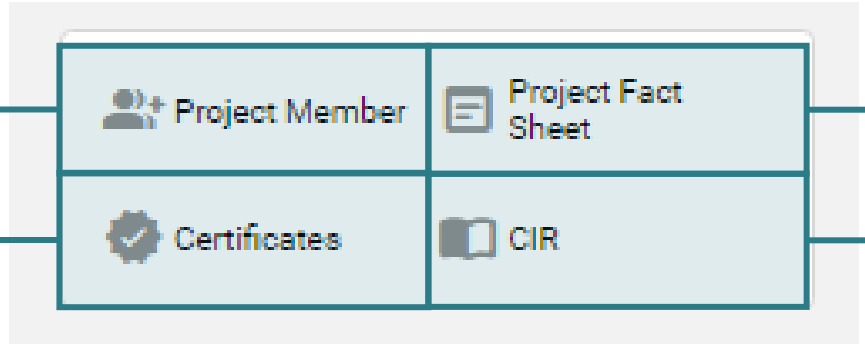
A1.5.3 Project Dashboard

Function Element

Manage **Project Member**
Refer to Section A5.3

Download **BEAM Plus certificate**
Coming Soon



Review information in the **project fact sheet**
Refer to Section A5.2

Make a **Credit Interpretation Request**
Refer to Section A4.2

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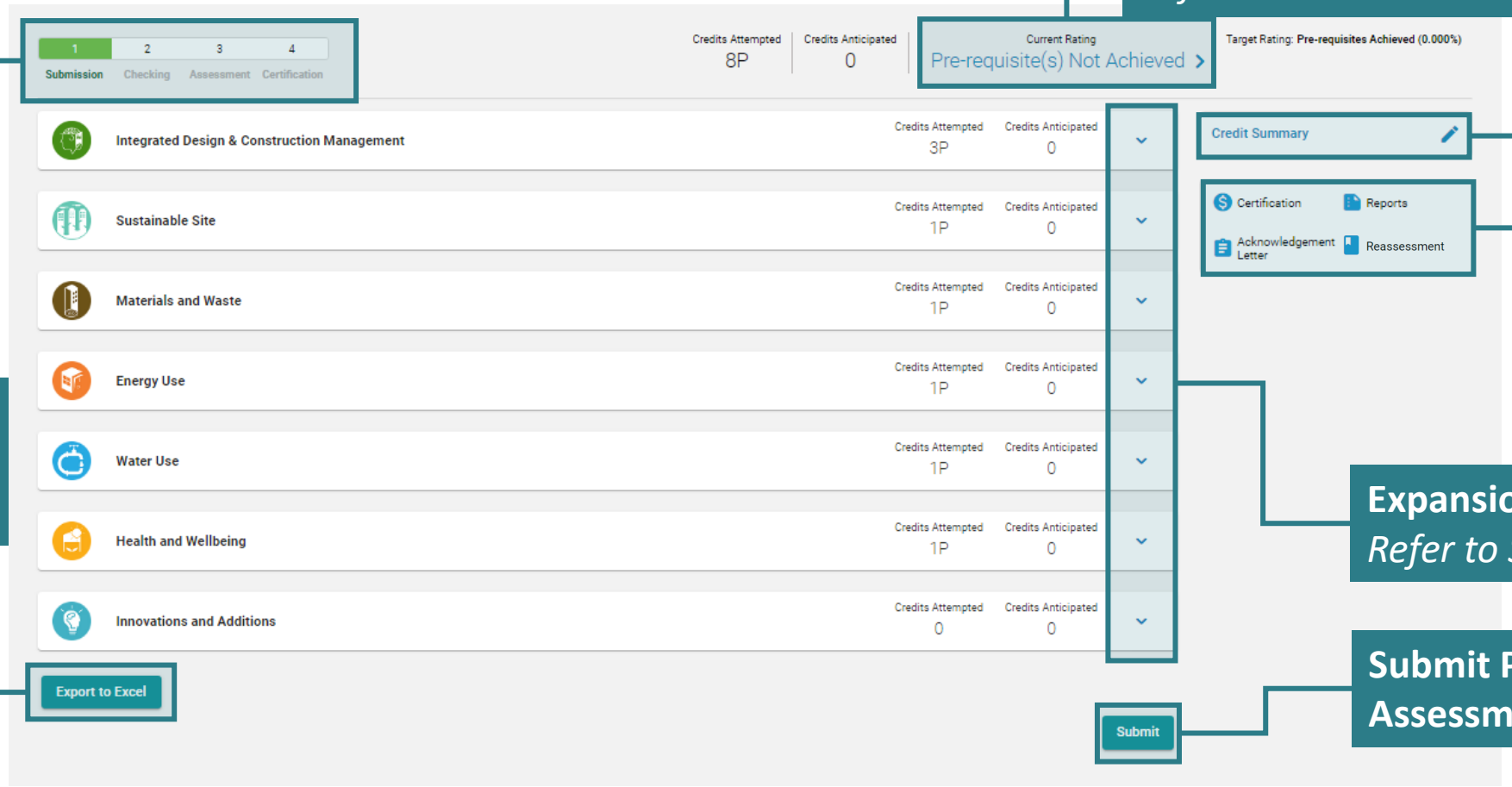
A1.6 Credit Summary Dashboard



Project Status Bar *Refer to Section A1.6.1*

Rating Summary *Refer to Section A1.6.2*

Credit Summary Setting *Refer to Section A1.6.3*

Function Element *Refer to Section A1.6.4*

Expansion of Credit Menu *Refer to Section A1.6.5*

Generate **pre-Assessment Summary**

Submit Project Assessment

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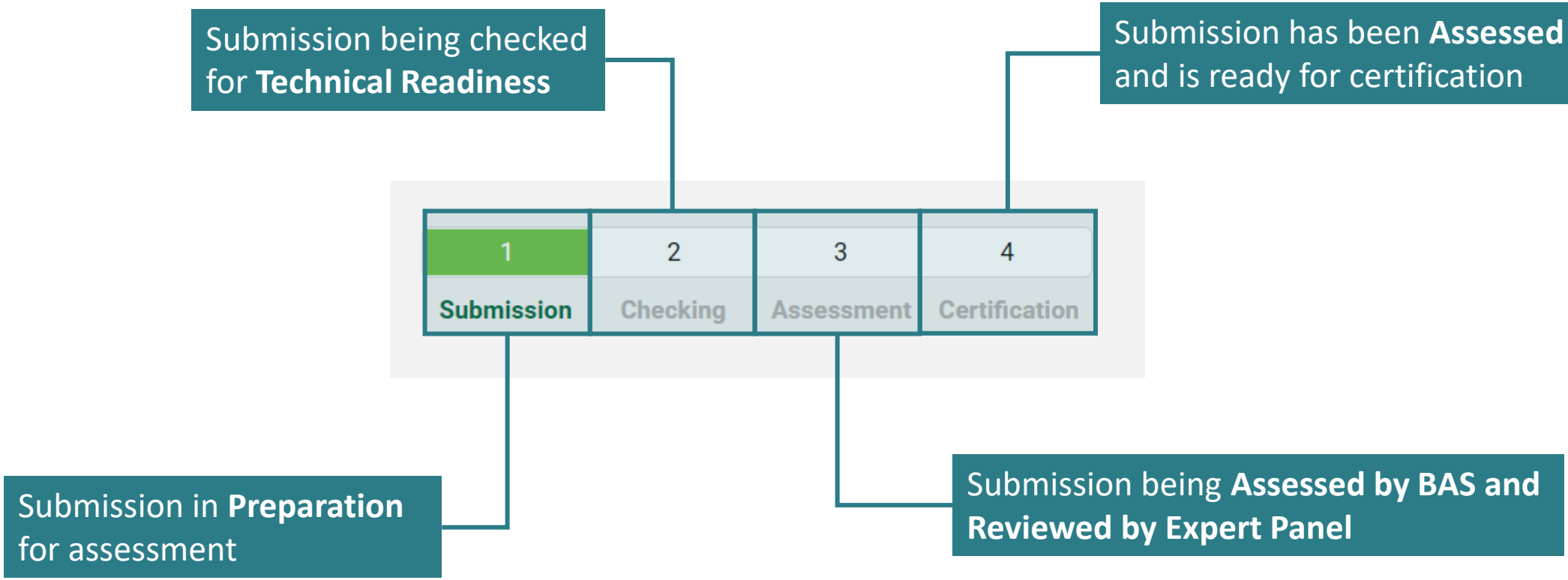
A1.6.1 Credit Summary Dashboard

Project Status Bar



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A1.6.2.1 Credit Summary Dashboard

Rating Summary

Rating Summary | Full Credit List

Rating Summary

Aspect	Credits Applicable	Credits Attempted	% Of Credits Attempted	Category Weight Factor	Score Attempted
IDCM	3P+25+14B	3P	0.000%	18	0.000%
SS	1P+19+18B	1P	0.000%	15	0.000%
MW	1P+14+21B	1P+1	7.142%	9	0.642%
EU	1P+31+13B	1P	0.000%	29	0.000%
WU	1P+12+3B	1P	0.000%	7	0.000%
HWB	1P+19+10B	1P	0.000%	22	0.000%
IA	10B	0	-	-	0.000%

Overall Rating 0.642% Prerequisite Achieved

Summary of credit scoring for the submission

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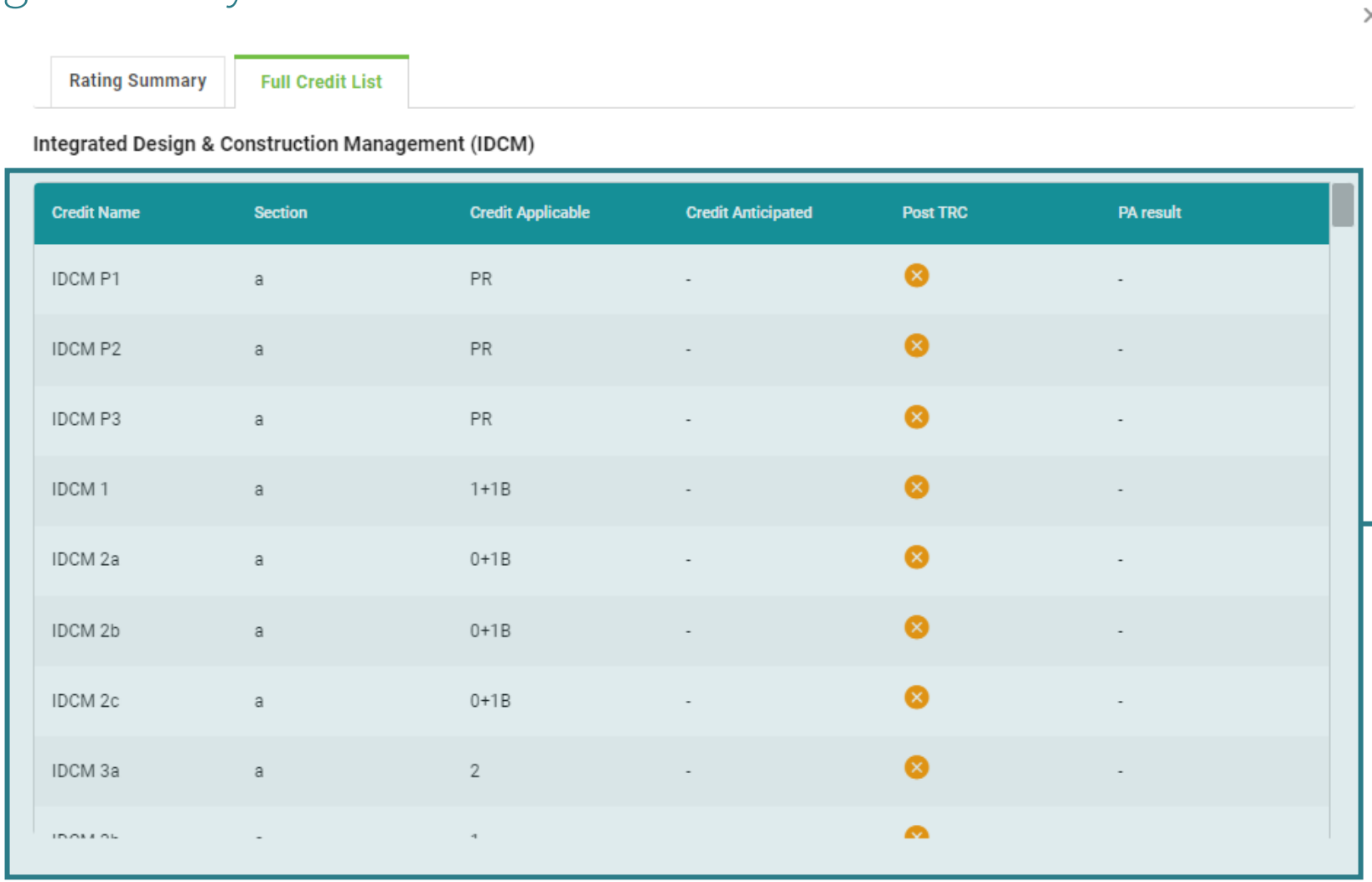
A1.6.2.2 Credit Summary Dashboard

Rating Summary



Summary of credits applicability, anticipation and achievement for the submission

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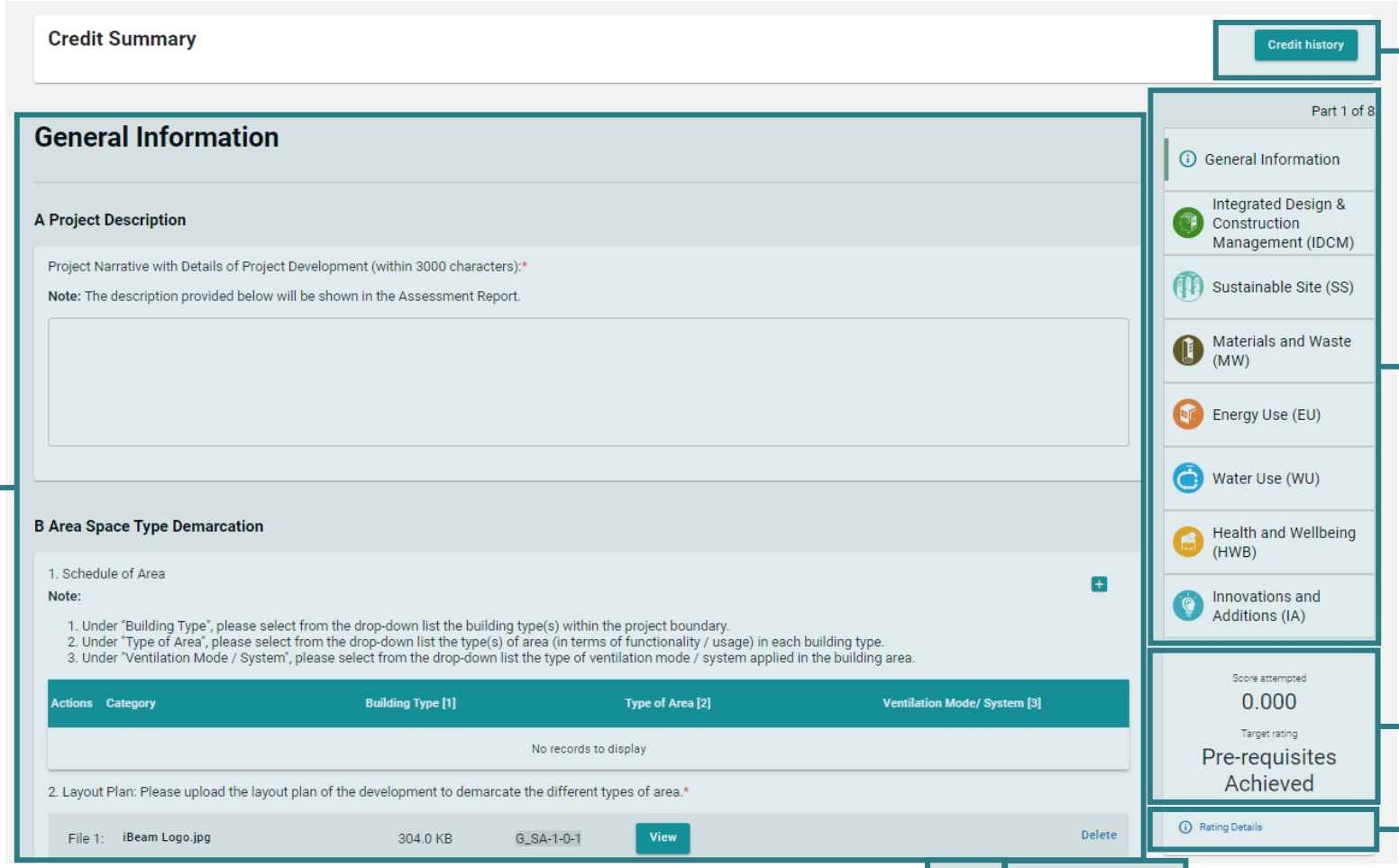
A1.6.3.1 Credit Summary Dashboard

Credit Summary Setting – General Information



List of **pre-Assessment Summary** *Refer to Section A1.6.3.2.1*

Input plane for general project information

Navigation to general information and different Aspects

Target rating and **score attempted** based on current credit selection

Rating Details *Refer to Section A1.6.2*

Save information

Save information and **proceed** inputting information in Aspects

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A1.6.3.2 Credit Summary Dashboard

Credit Summary Setting – Individual Aspect

Selection of Credit **Compliance Path**
Applicable for credits with multiple compliance path

Selection of **Credit Scoring**
Enable after selecting the credit attempt

Download **Credit History** of Credit Summary

Navigation to general information and different Aspects

Save information in the current Aspect and **proceed** inputting information in the next Aspect

Selection of **Credit Attempt**

Save information in the current Aspect

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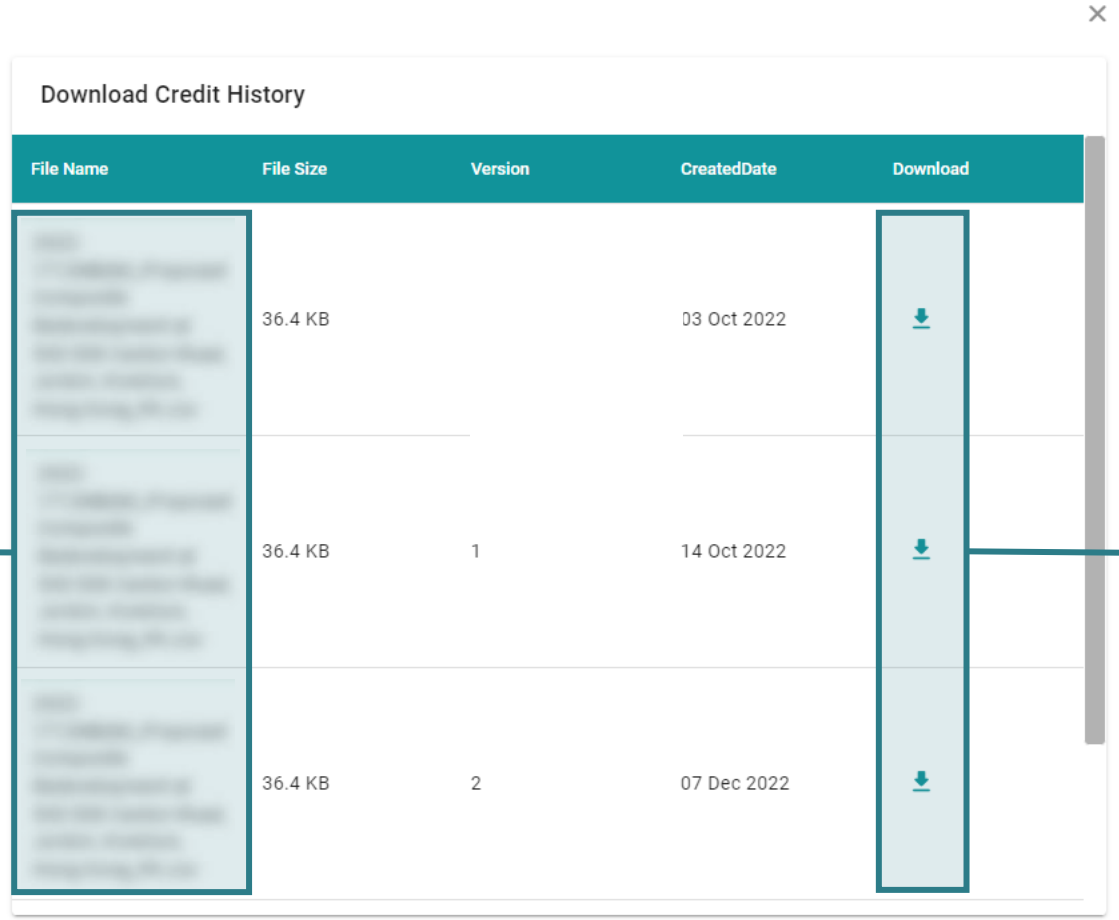
A1.6.3.2.1 Credit Summary Dashboard

Credit Summary Setting – Individual Aspect



List of pre-Assessment Summary generated

Download pre-Assessment Summary

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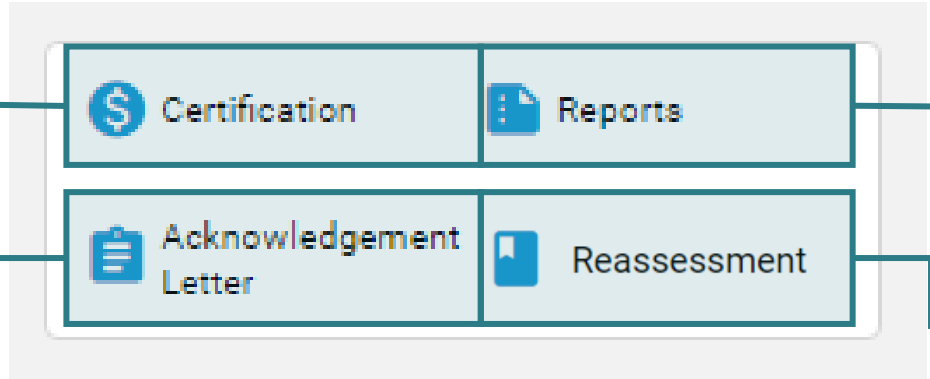
A1.6.4 Credit Summary Dashboard

Function Element

Download **BEAM Plus certificate**
Coming Soon

Download
Acknowledgement Letter
Refer to Section A5.9.2



Download **Assessment Report**
Refer to Section A5.9.4

Proceed with **Re-assessment**
Refer to Section A5.9.19

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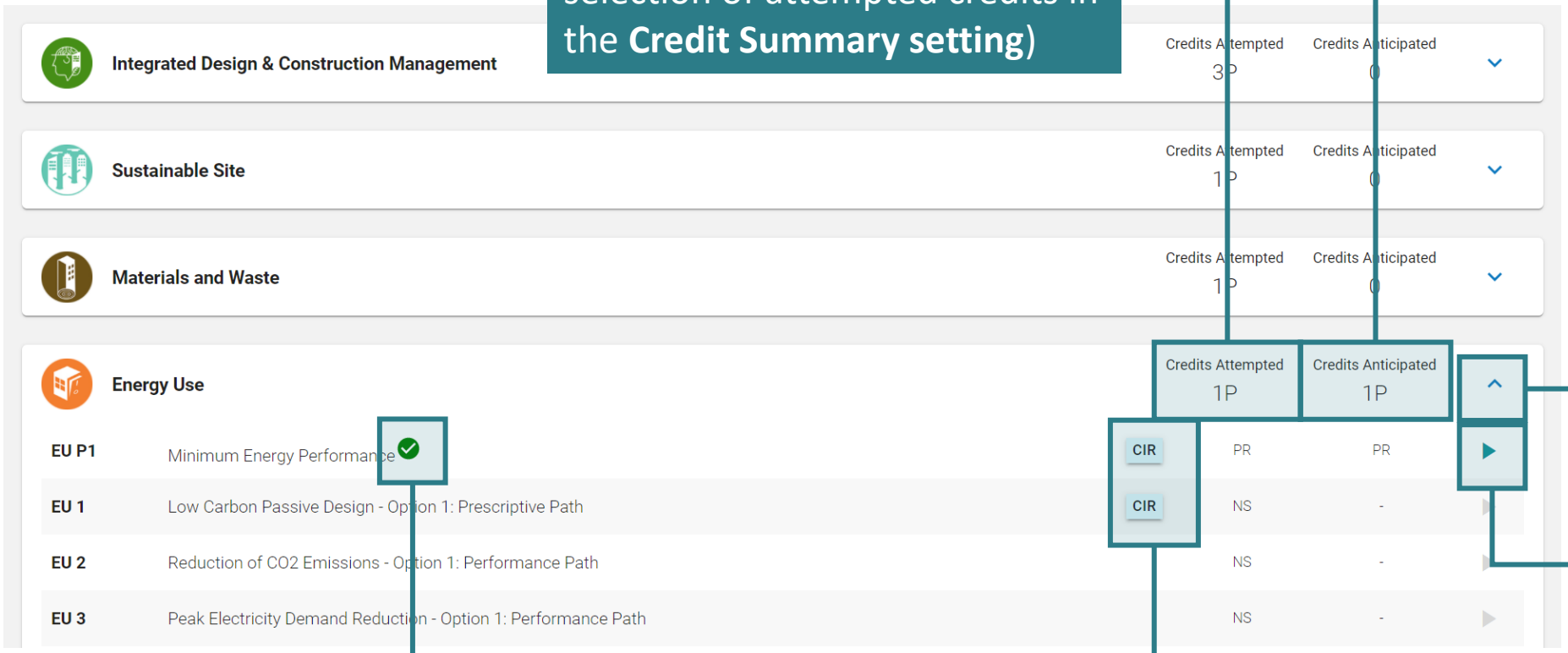
A1.6.5 Credit Summary Dashboard

Expansion of Credit Menu

Credits Attempted
(calculated based on the total selection of attempted credits in the **Credit Summary setting**)

Credits Anticipated
(calculated based on the total number of credits complying with the **documentary readiness** check in the e-Form)



Collapse Credit Menu

Access e-Form of Individual Credit
Refer to Section A1.7

Credits ready for **Submission**

Credits with **CIR Applied**

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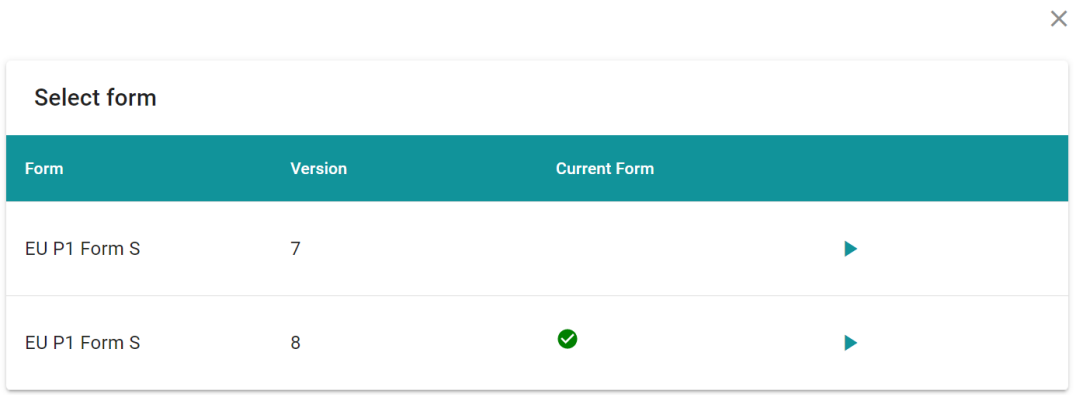
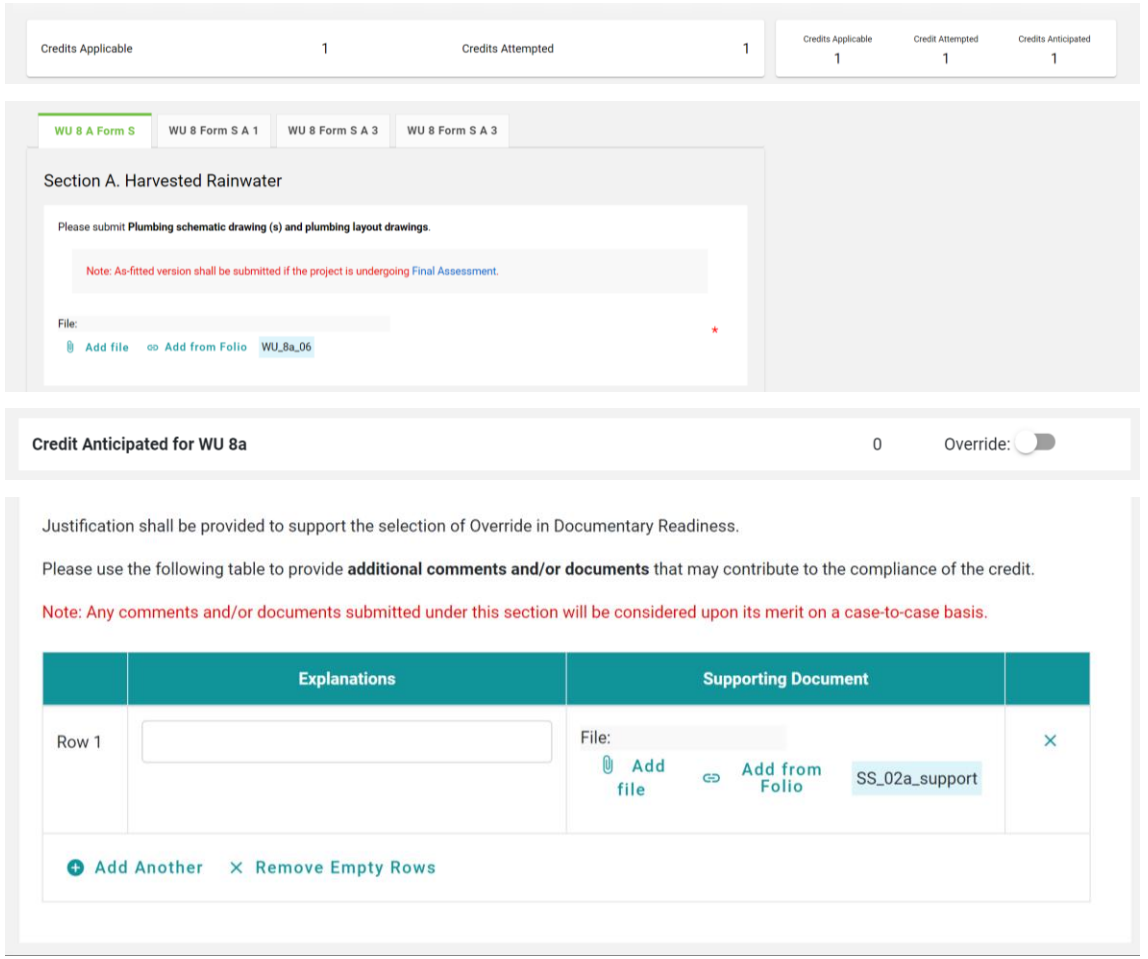
A1.7 e-Form





1 Selection of Form

Refer to Section 1.7.1

Tips:

Please refer to **Appendix C** for the calculation logic of relevant e-form.

2 e-Form of Individual Credit

Refer to Section 1.7.2

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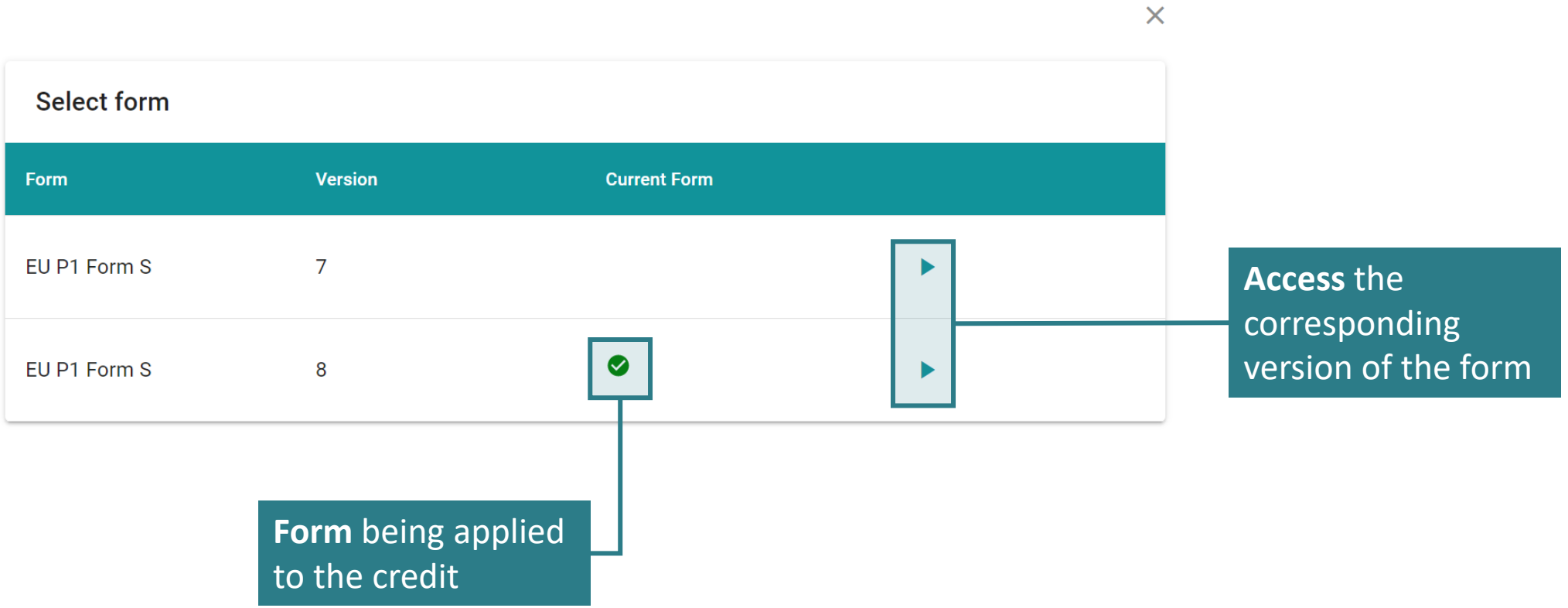
A1.7.1 Selection of e-Form

This dialogue box will pop up if the credit contains multiple versions of e-Form



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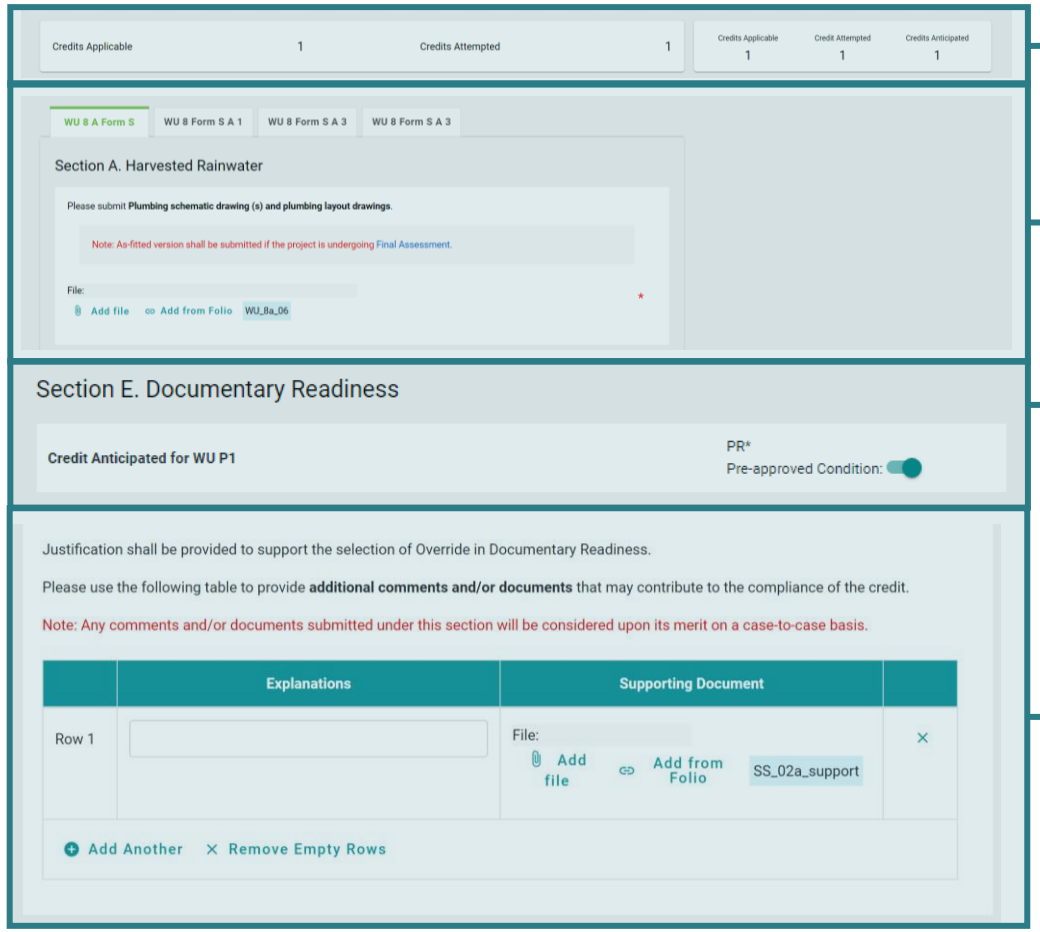
A1.7.2 e-Form of Individual Credit

Each of the e-Form is divided into four sections as shown below.



1 Credit Bar

Refer to Section A1.7.2.1

2 Form Content

Refer to Section A1.7.2.2

3 Documentary Readiness

Refer to Section A1.7.2.3

4 Additional Information

Refer to Section A1.7.2.4

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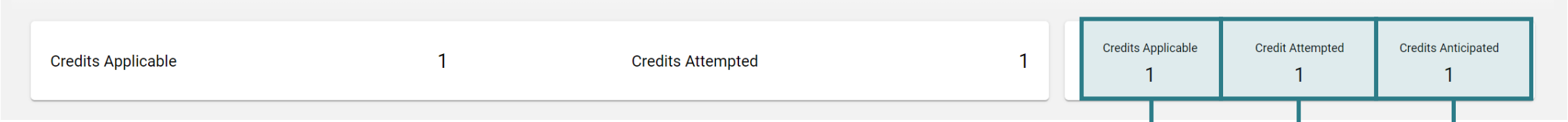
A1.7.2.1 e-Form of Individual Credit

Credit Bar



Credit Applicable as per the setting in the **Credit Summary Dashboard** in *Section A1.6*

Credit Attempted as per the setting in the **Credit Summary Dashboard** in *Section A1.6*

Credit Anticipated based on the **Documentary Readiness** in *Section A1.7.2.3*

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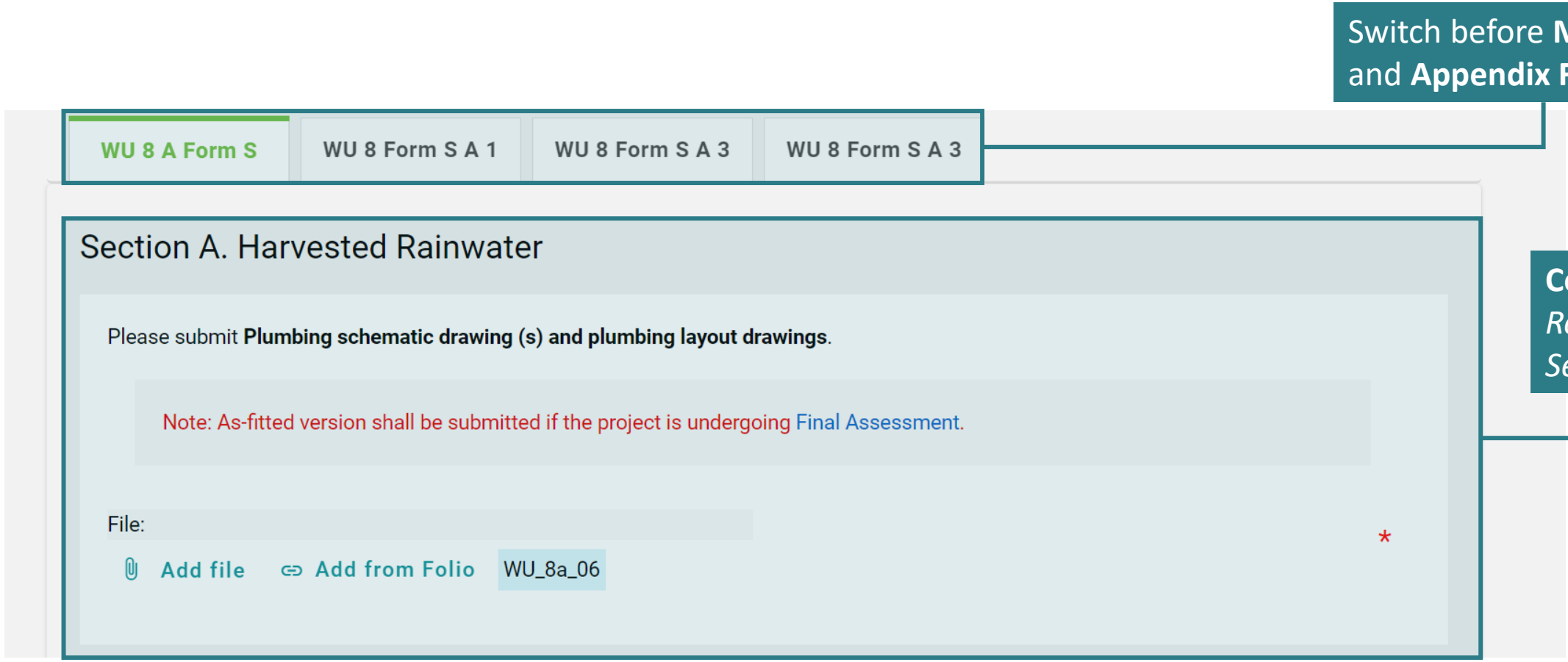
A1.7.2.2 e-Form of Individual Credit

Form Content

Switch before **Main Form** and **Appendix Form**



Content Elements
Refer to Section A1.7.2.2.1

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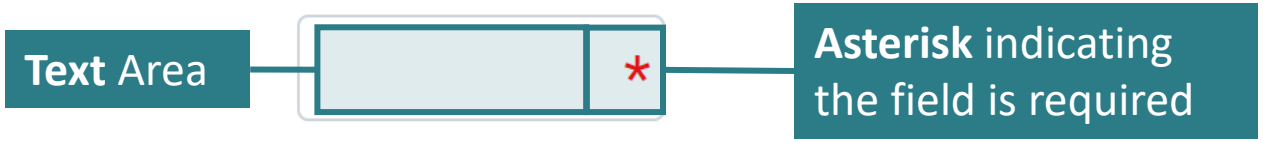
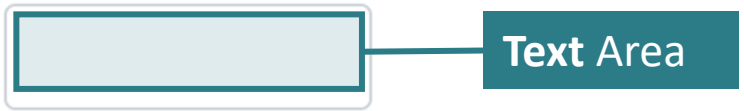
A1.7.2.2.1 e-Form of Individual Credit

Form Content – Content Elements

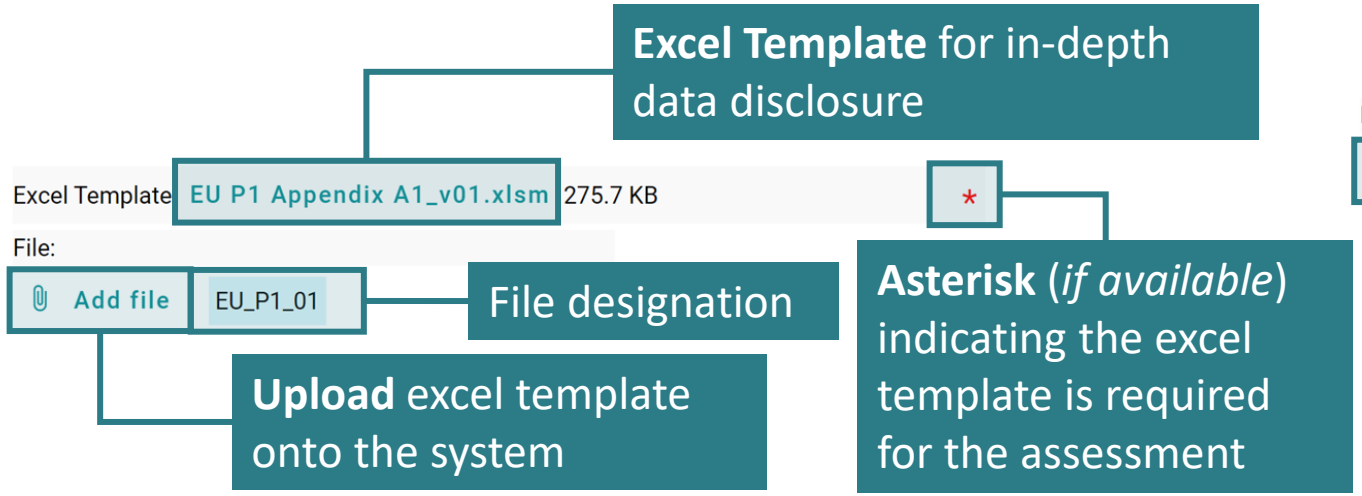
A **Required Field**



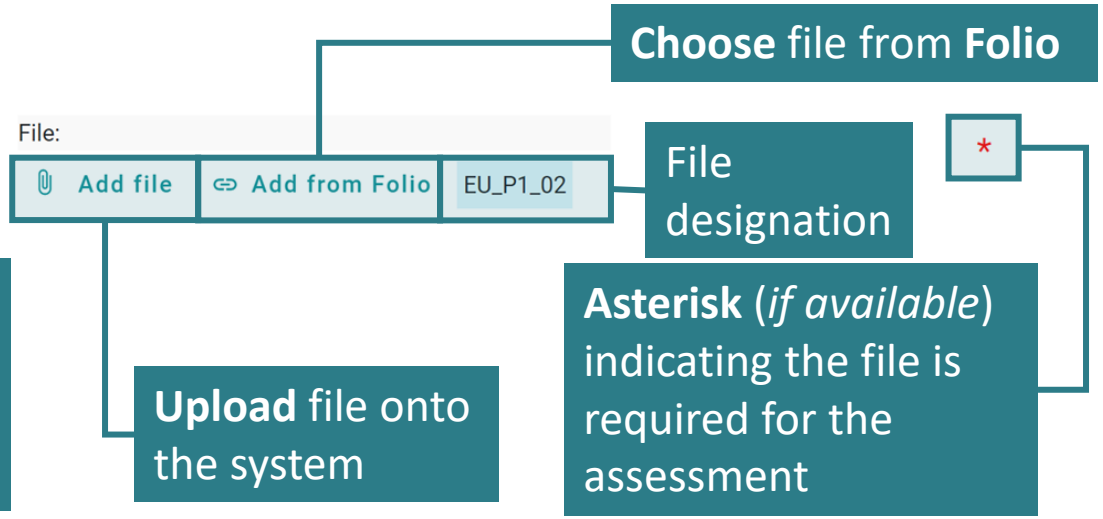
B **Optional Field**



C **File Upload with Excel Template**



D **File Upload – *Details Refer to 1.7.2.2.1.1***



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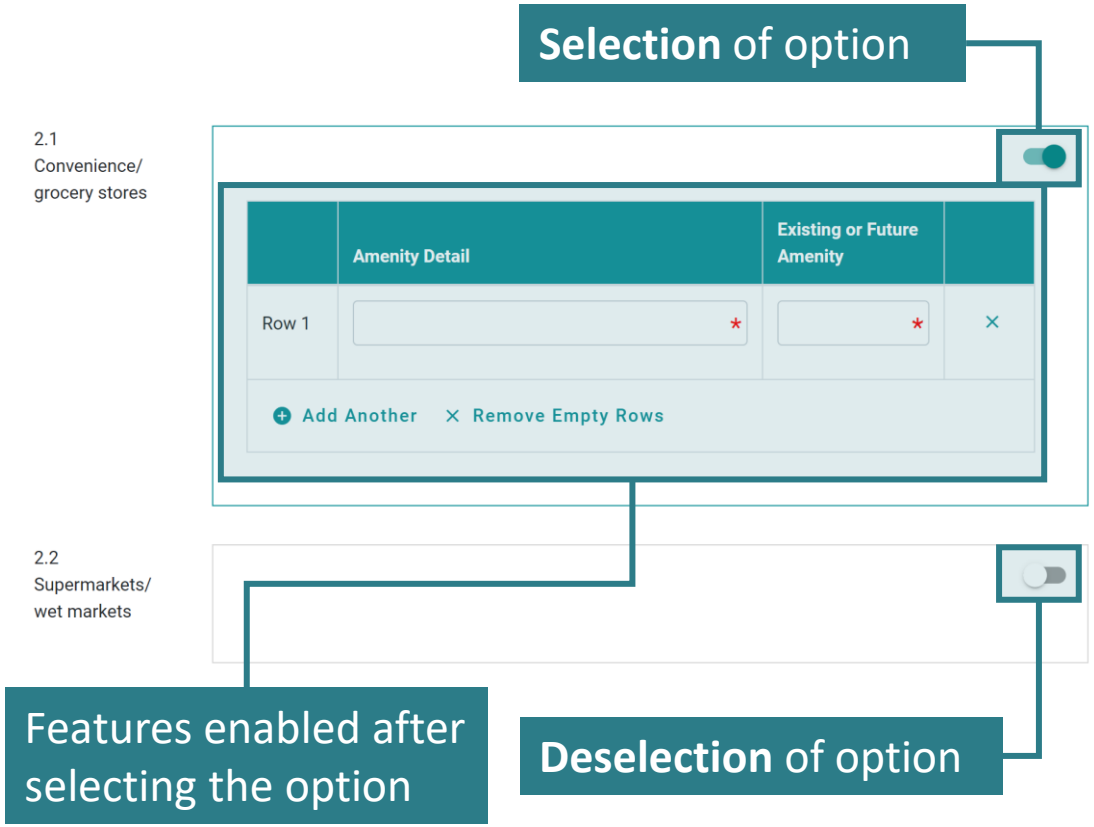
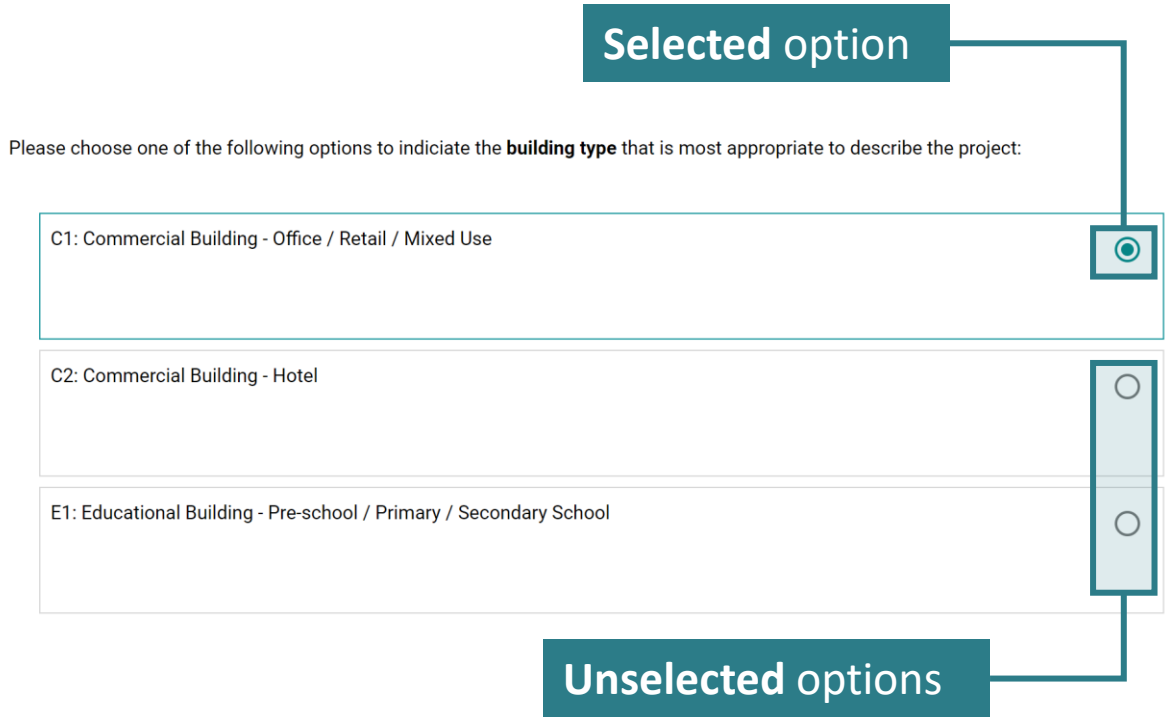
A1.7.2.2.2 e-Form of Individual Credit

Form Content – Content Elements

E Selection Box with Multiple Selections



F Selection Box with Single Selection



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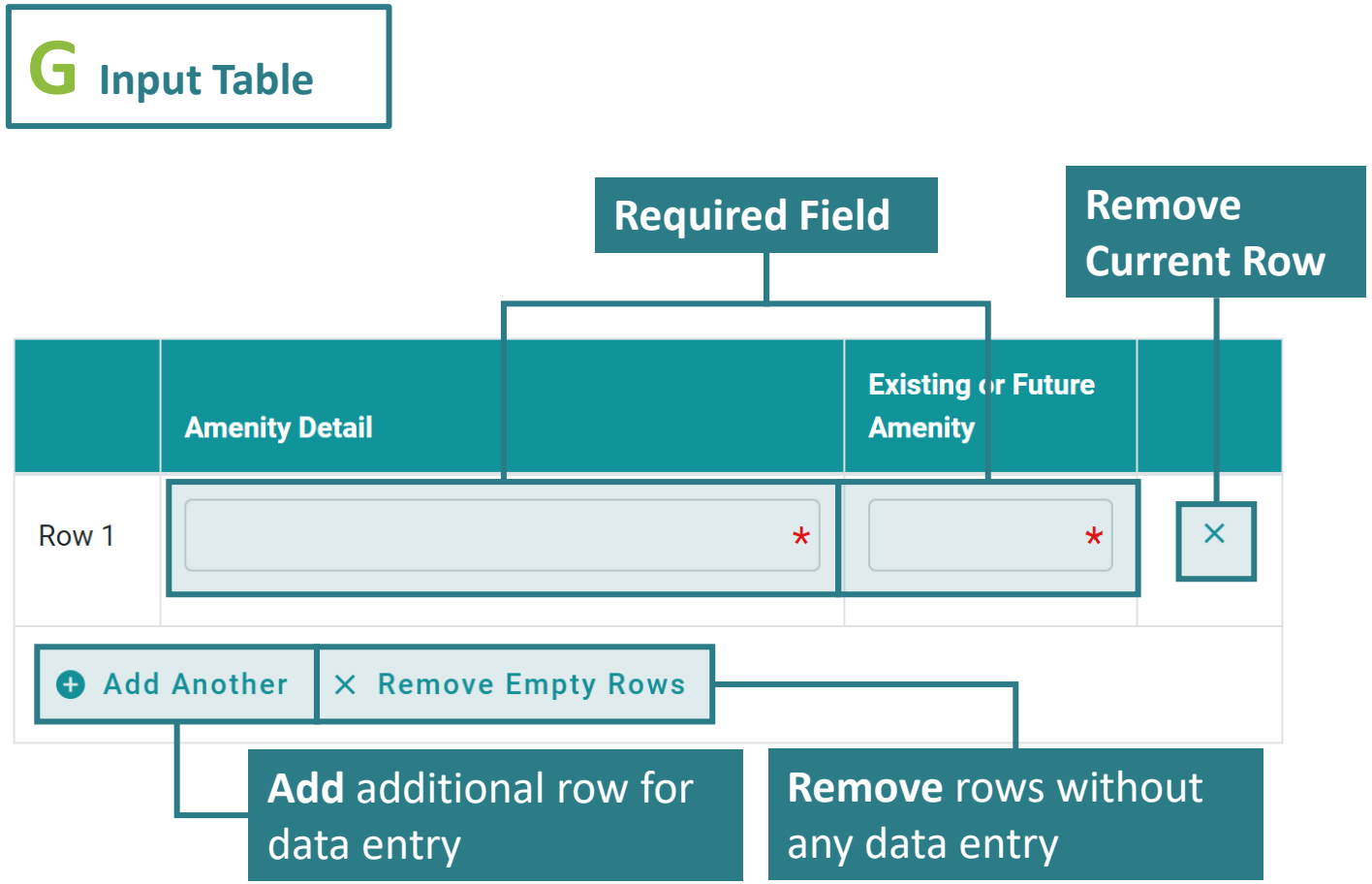
A1.7.2.2.3 e-Form of Individual Credit

Form Content – Content Elements



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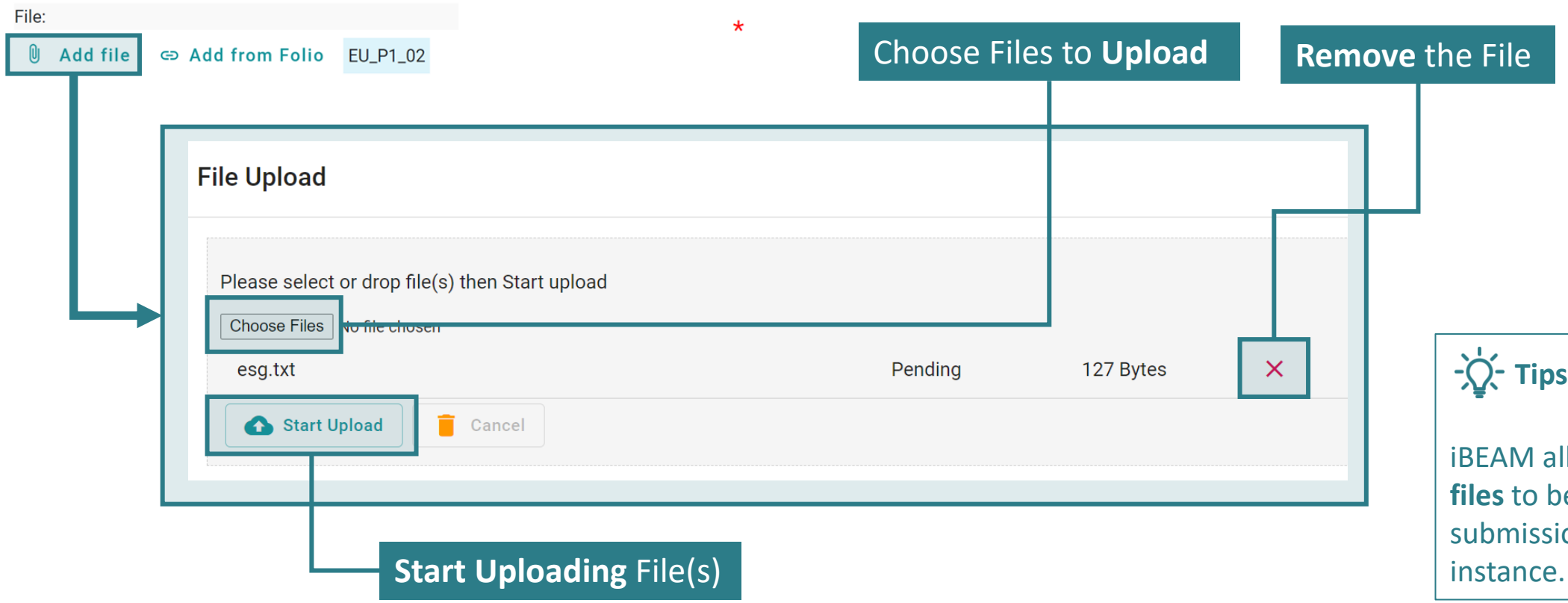
A1.7.2.2.1.1 e-Form of Individual Credit

Form Content – Content Elements (File Upload)

A **Add file**



Tips:

iBEAM allows **multiple files** to be uploaded to a submission in a single instance.

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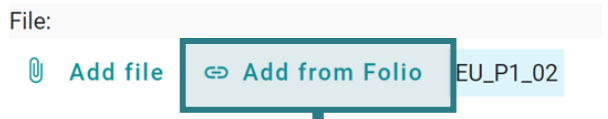
A1.7.2.2.1.2 e-Form of Individual Credit

Form Content – Content Elements (File Upload)

B **Add from Folio**

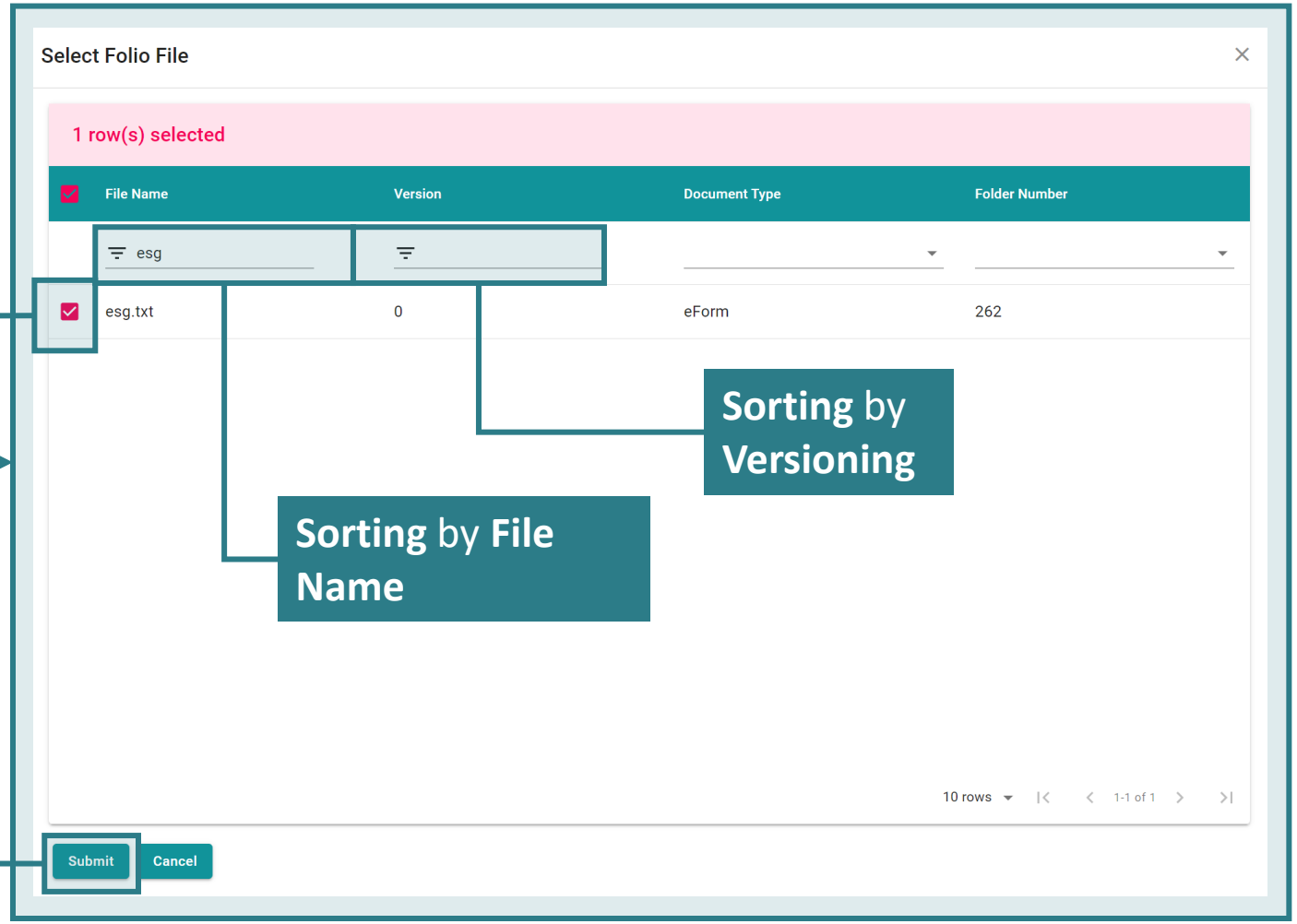


Selection of Files

Sorting by **Versioning**

Sorting by **File Name**

Submit to confirm the selection of files



Tips:

iBEAM allows **multiple files** to be added into the submission in a single instance.

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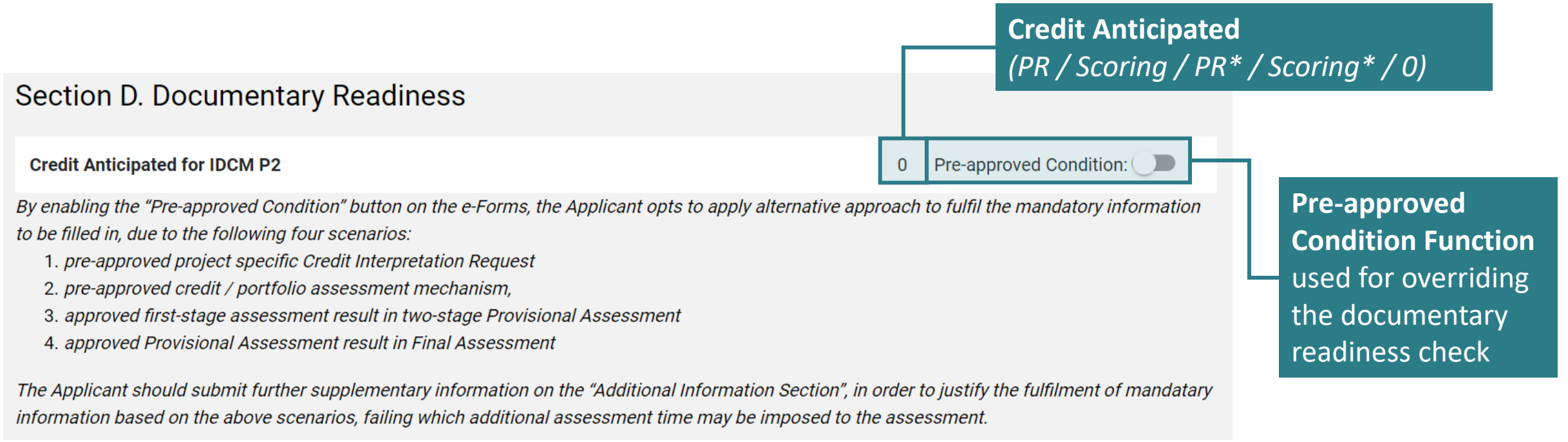
A1.7.2.3 e-Form of Individual Credit

Documentary Readiness



Tips:

* will be indicated next to the scoring if the pre-approved condition function is enabled.

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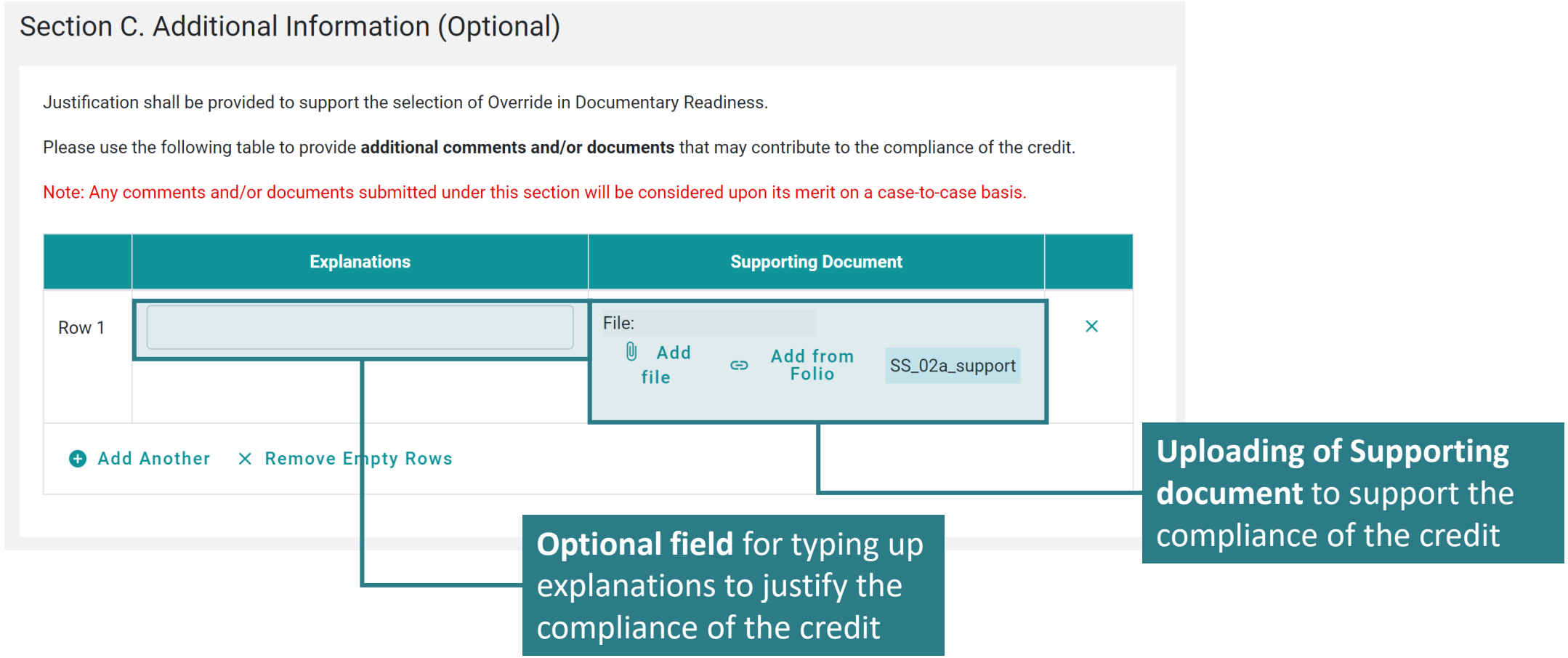
A1.7.2.4 e-Form of Individual Credit

Additional Information



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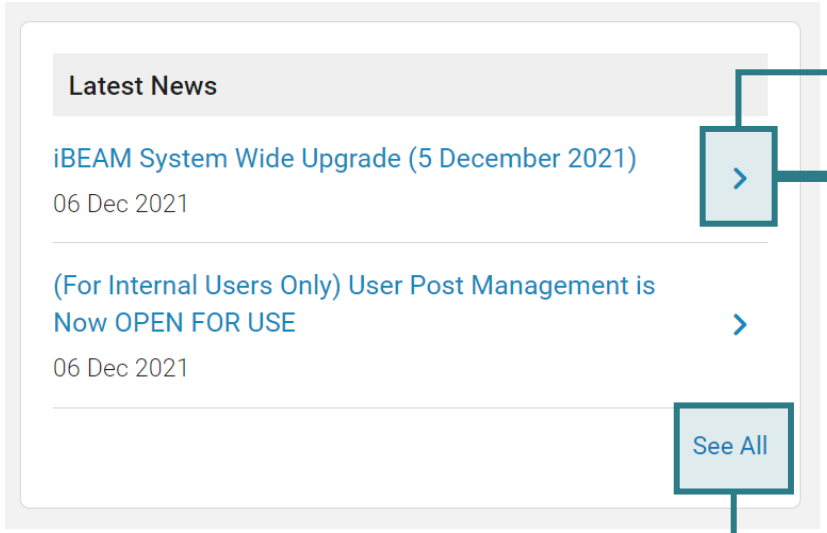
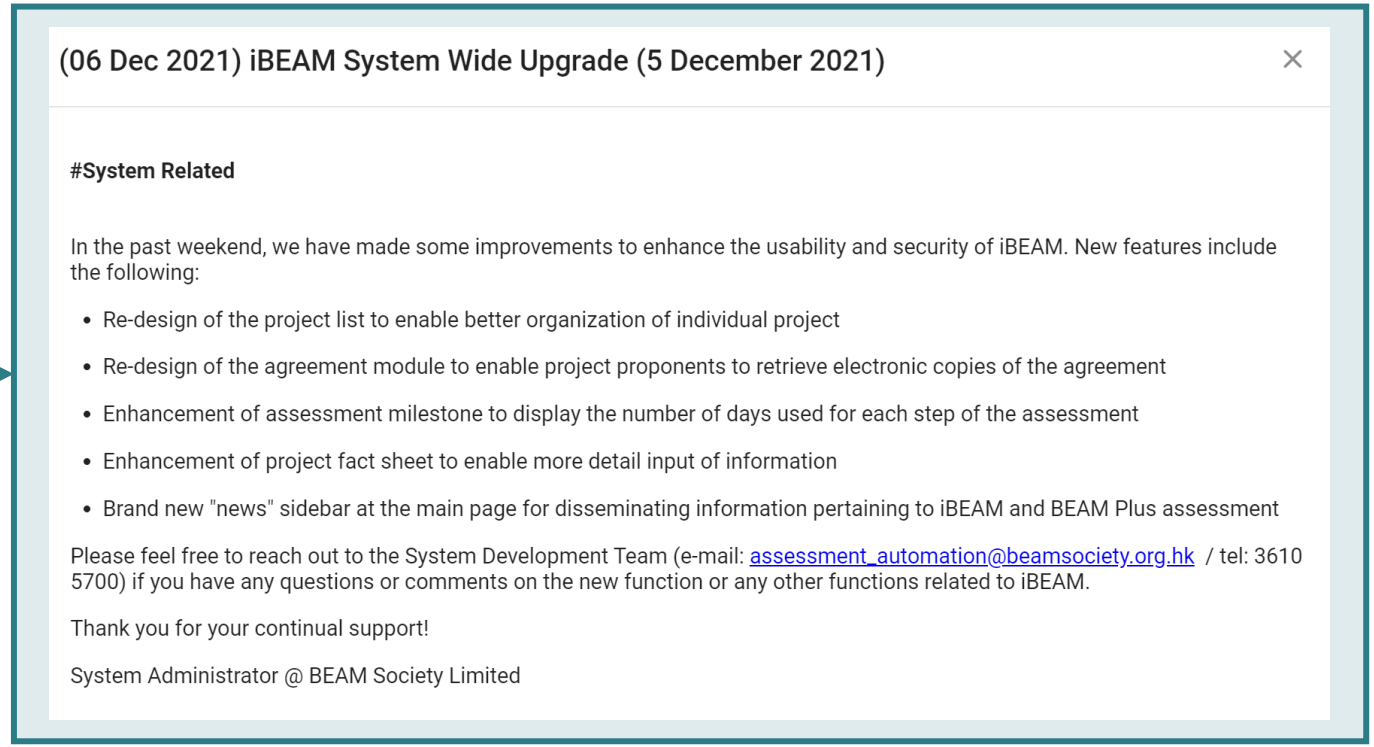
A1.8.1 Newsfeed

Latest News



View Individual News

See All News



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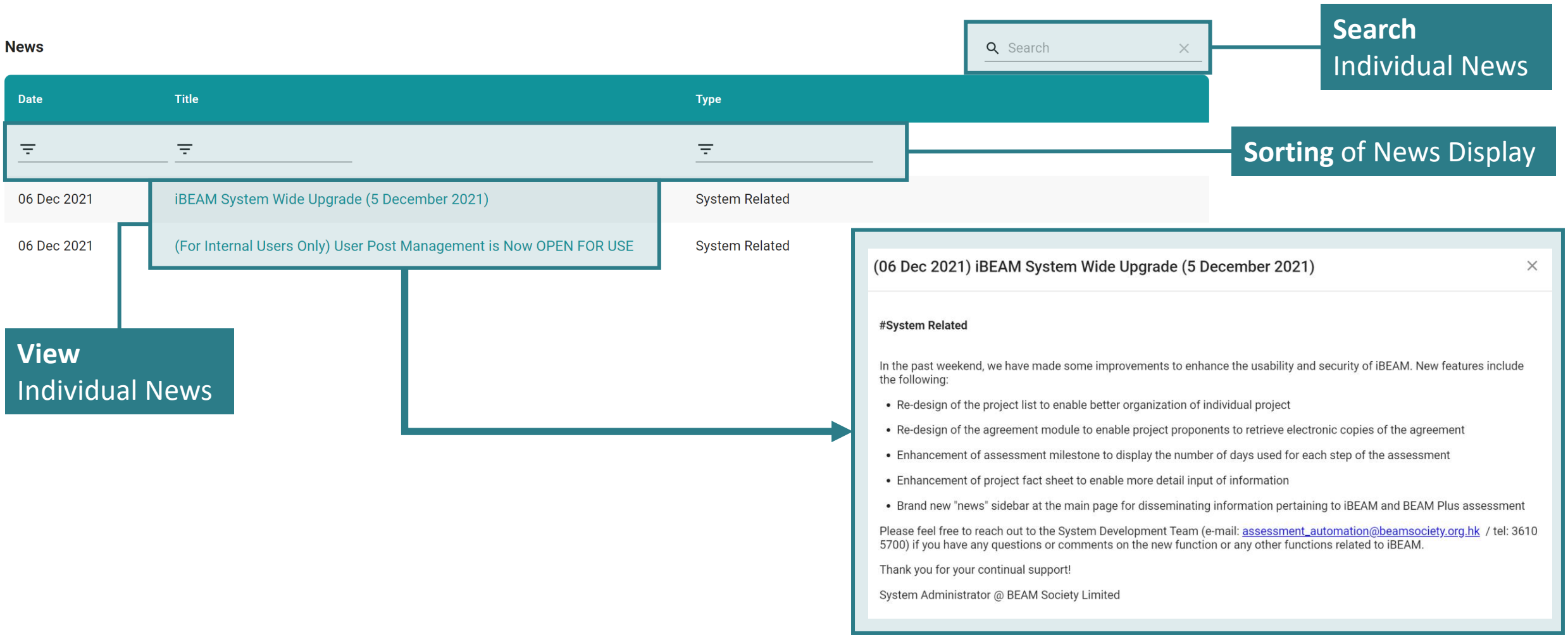
A1.8.2 Newsfeed

News Portal



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Section A2 Account Management

This section lays down the procedures in managing the accounts and user profile on the iBEAM.

A2.1 Create Account

A2.2 Log In

A2.3 Forgot Password

A2.4 User Profile Management

A2.5 Log Out

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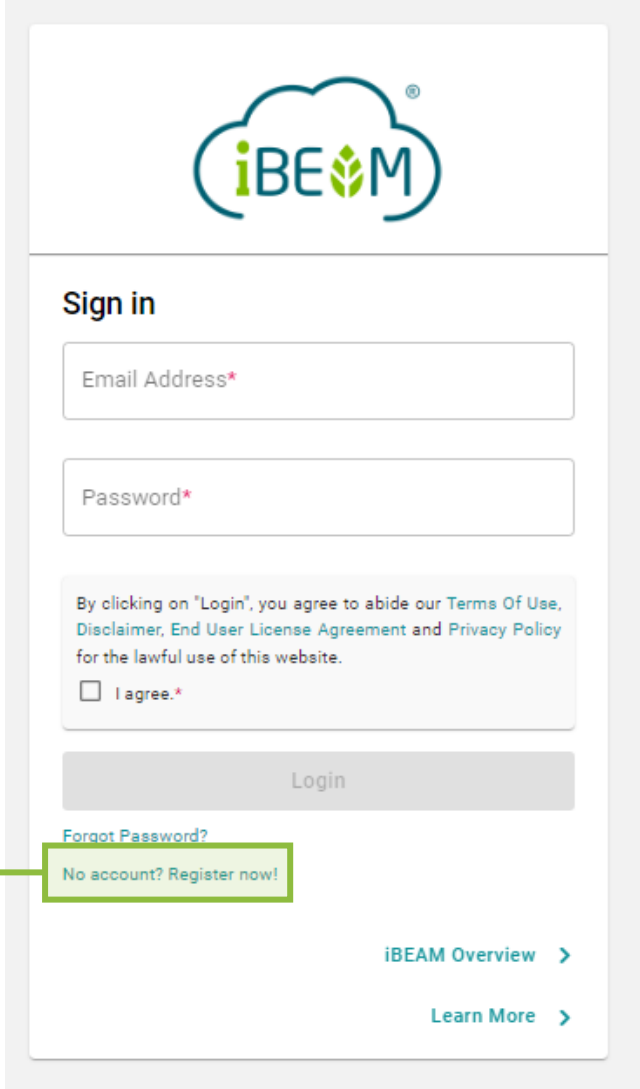
A2.1.1 Create Account

Step 1:
Click **No account? Register now!** at the Login Page



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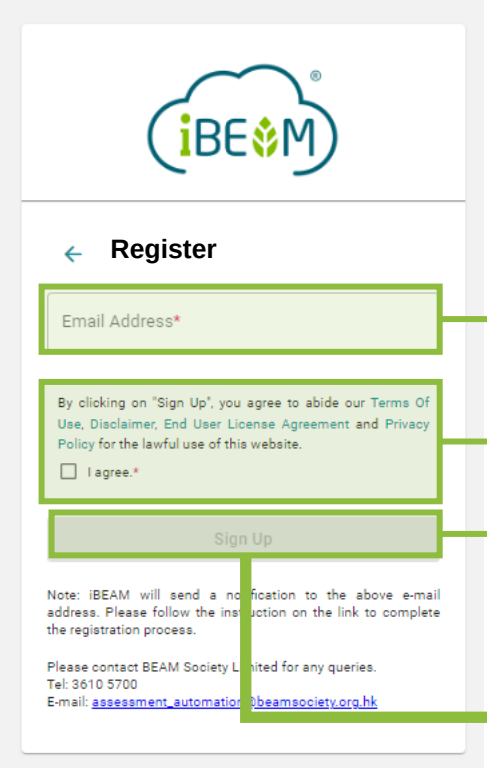
A2.1.2 Create Account



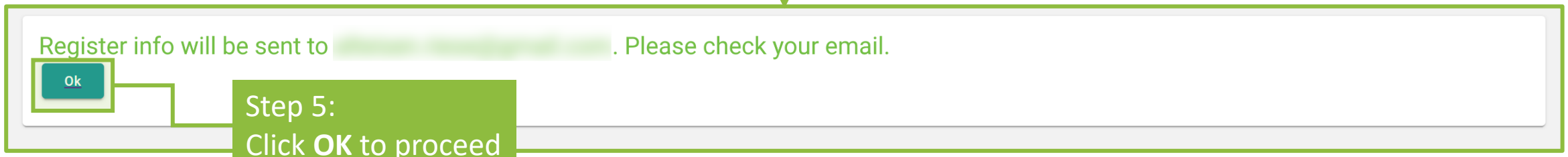
Step 2:
Type the **E-mail Address**

Step 3:
Click the **Checkbox** to confirm that you agree to abide our **Terms Of Use**, **Disclaimer**, **End User License Agreement** and **Privacy Policy**

Step 4:
Click **Sign Up**

Tips:

Please read the **Terms of User**, **Disclaimer** and **Privacy Policy** before proceeding with the registration.



Step 5:
Click **OK** to proceed

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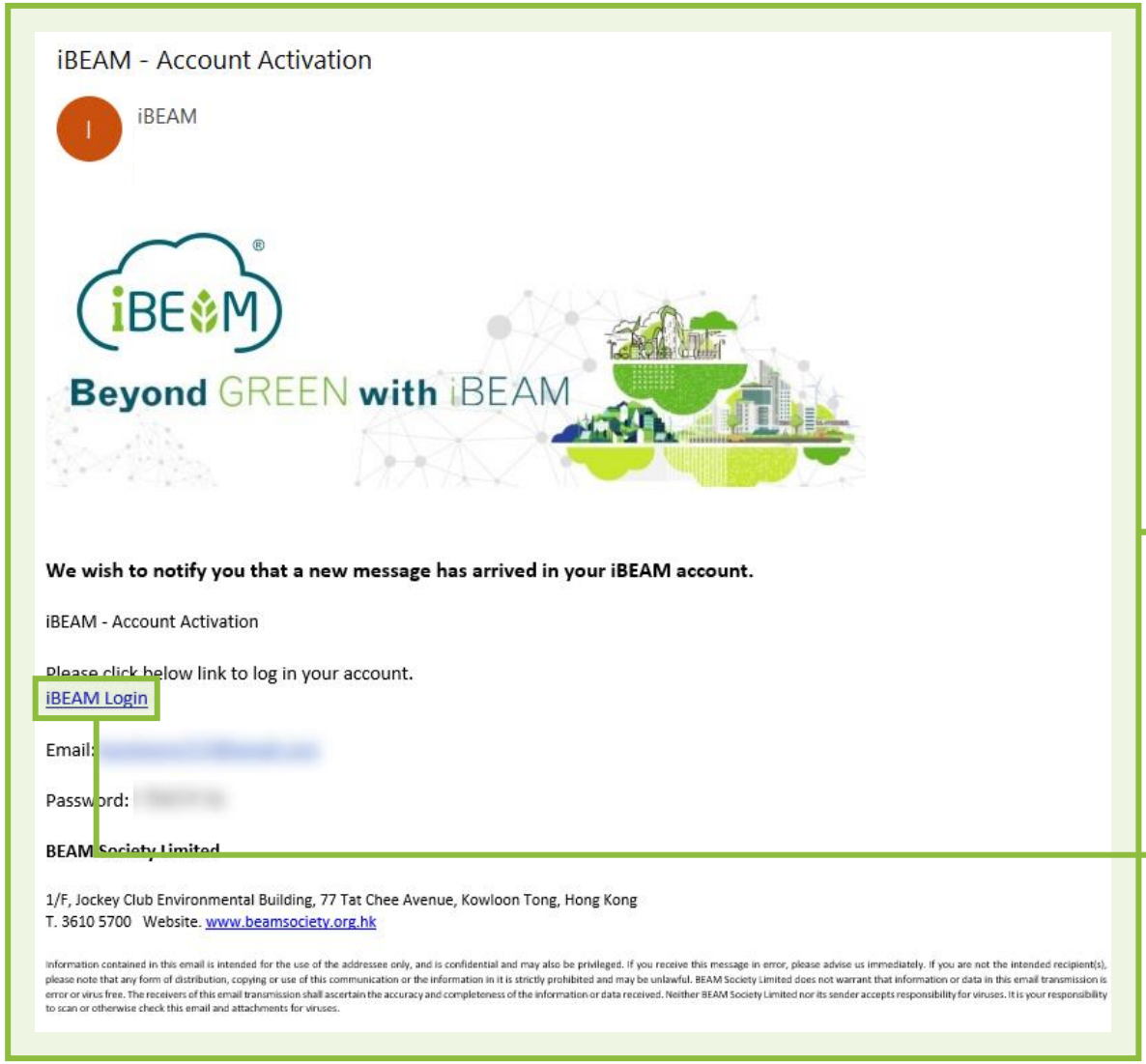
A2.1.3 Create Account


iBEAM - Account Activation

iBEAM

Beyond GREEN with iBEAM

We wish to notify you that a new message has arrived in your iBEAM account.

iBEAM - Account Activation

Please click below link to log in your account.

iBEAM Login

Email:

Password:

BEAM Society Limited

1/F, Jockey Club Environmental Building, 77 Tat Chee Avenue, Kowloon Tong, Hong Kong
T. 3610 5700 Website. www.beamsociety.org.hk

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Step 5:
Notification will be sent to the e-mail specified under *Step 2*

Step 6:
Click the **iBEAM Login Link** to proceed to the login page

Tips:

The registration notification may be filtered out by email spam filter. Please check the **junk folder** if the registration notification does not appear in the inbox. Additionally, please ensure that **ibeam@beamsociety.org.hk** is added as a safe sender in the email setting.

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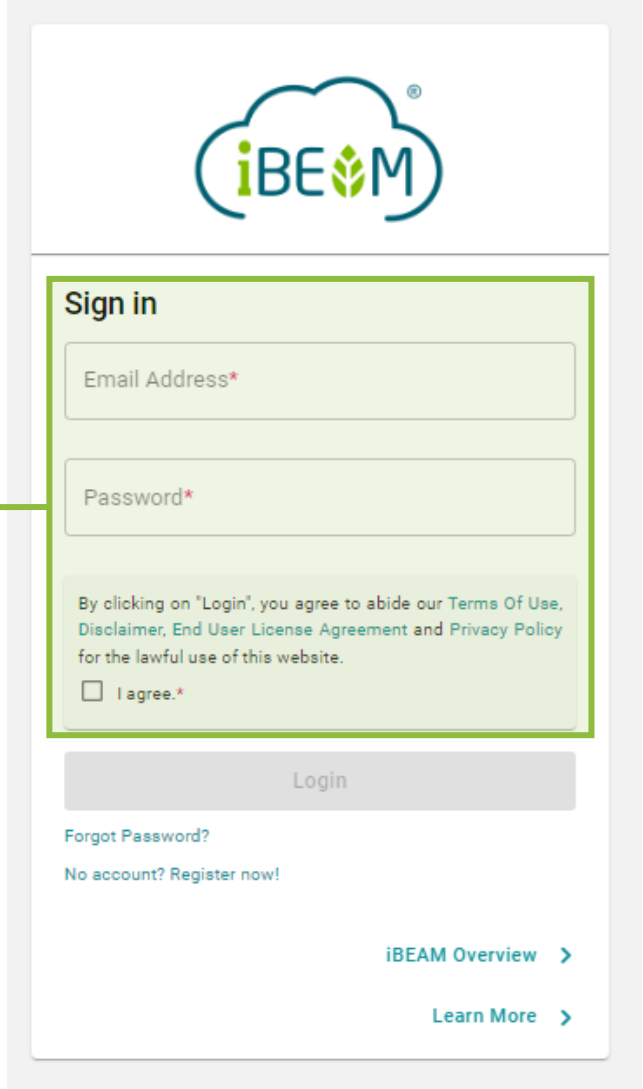
A2.1.4 Create Account

Step 7:
Type the **E-mail Address** and **Password** given in the account activation notification at the login page, and click the checkbox for login agreement



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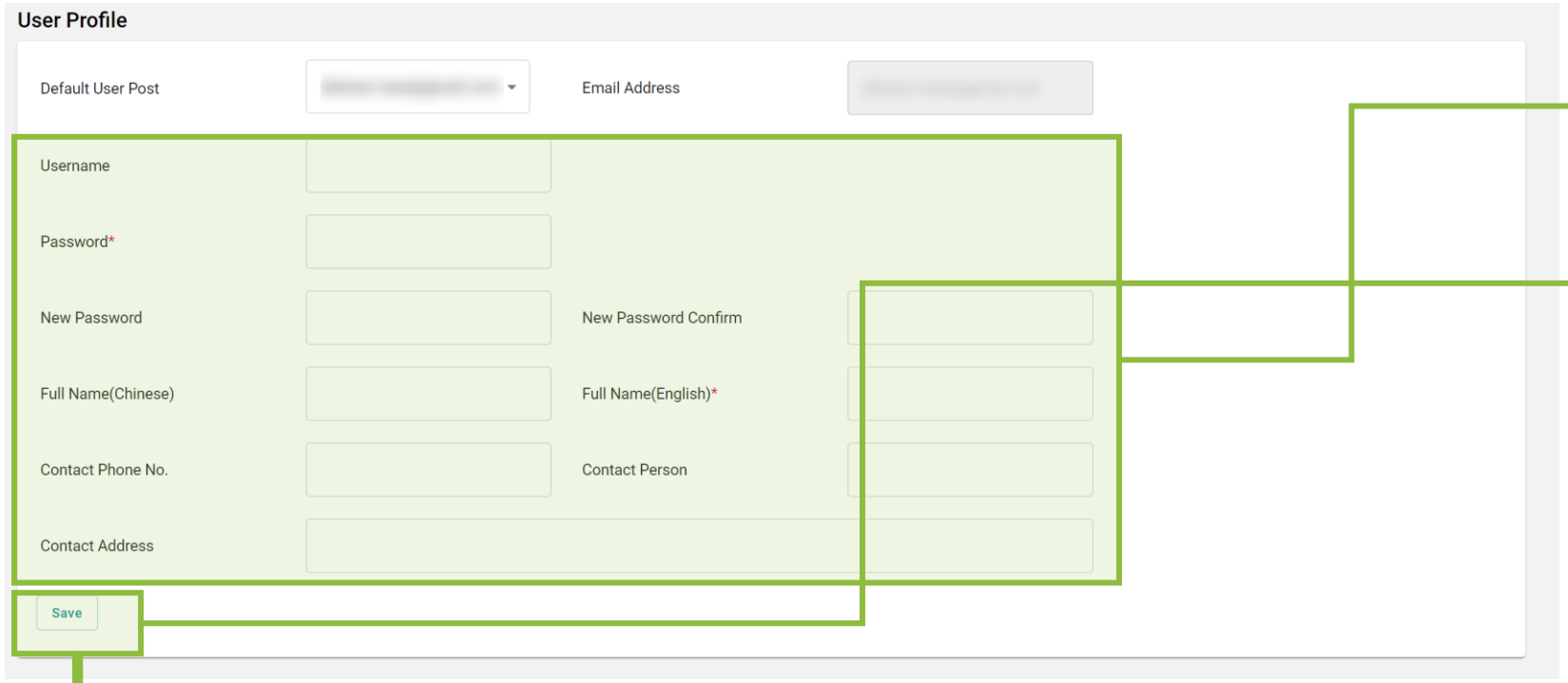
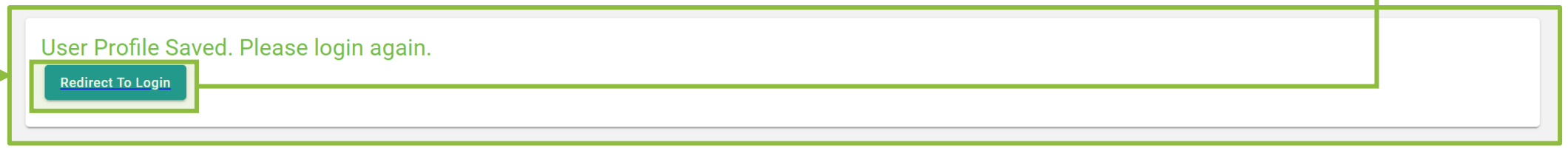
A2.1.5 Create Account



Step 8:
Input the account information into the **User Profile**

Step 9:
Click **Save** to save the information

Step 10:
Click **Redirect to Login** to complete the registration and go back to the login page



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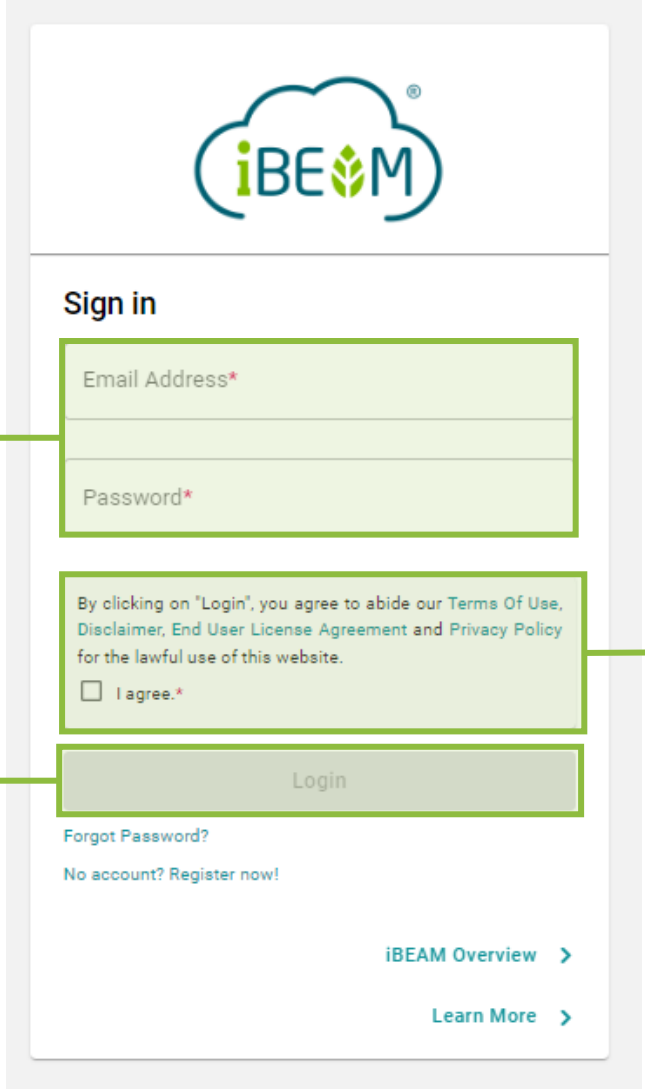
A2.2 Log In

Step 1:
Type the **E-mail Address** and **Password** at the login page



Step 2:
Click the **Checkbox** to confirm that you agree to abide our **Terms Of Use**, **Disclaimer**, **End User License Agreement** and **Privacy Policy**

Step 3:
Click **Login**

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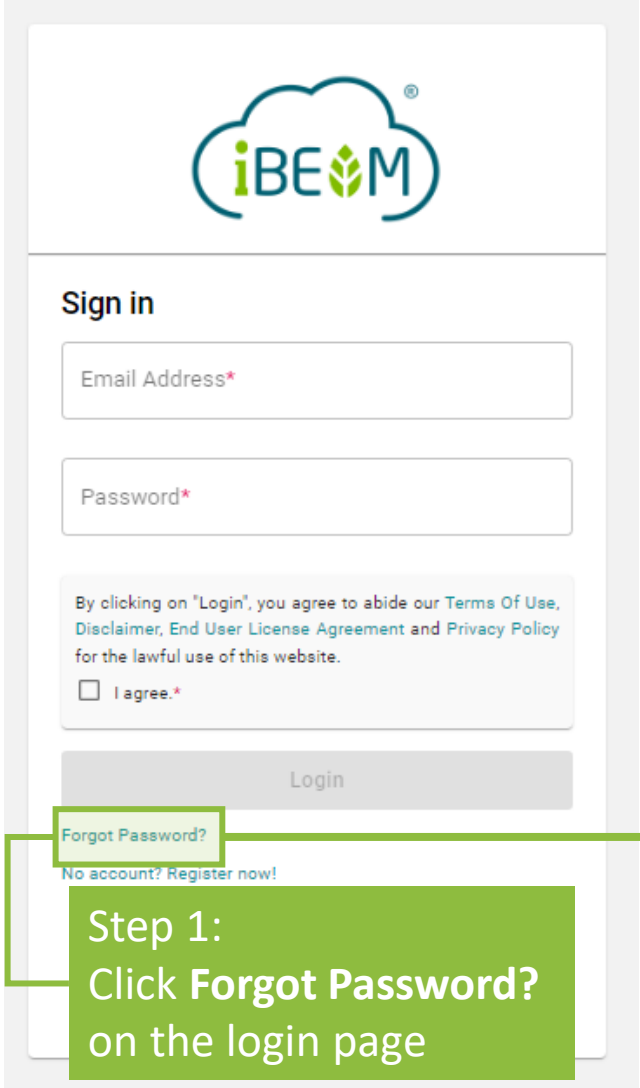
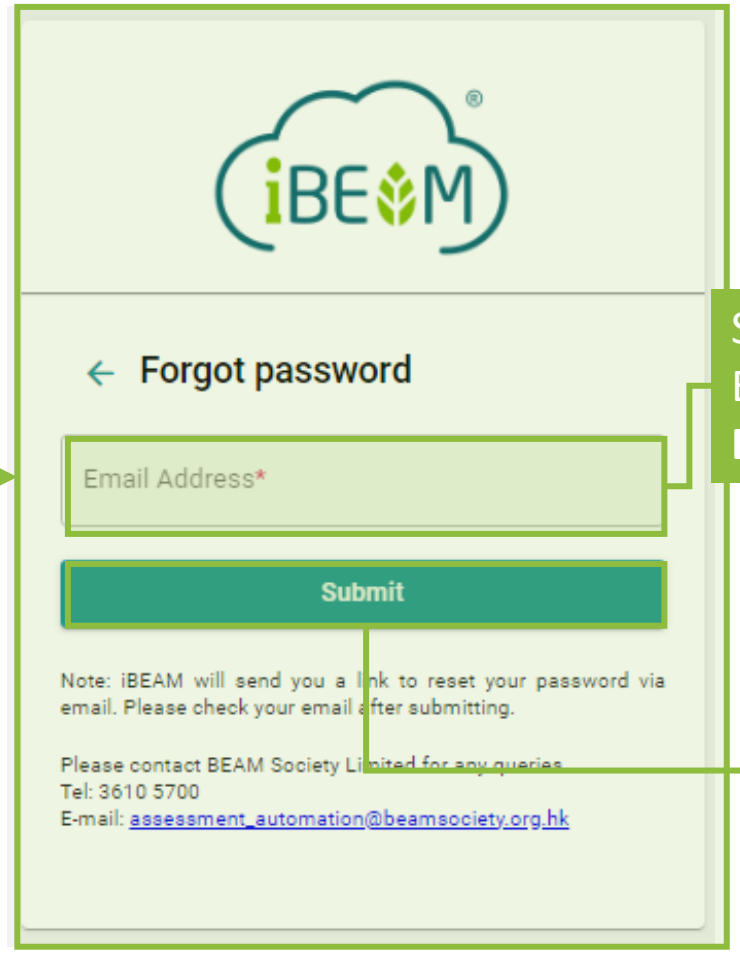
A2.3.1 Forgot Password



Step 1:
Click **Forgot Password?** on the login page



Step 2:
Enter the account's **E-mail Address**

Step 3:
Click **Submit**

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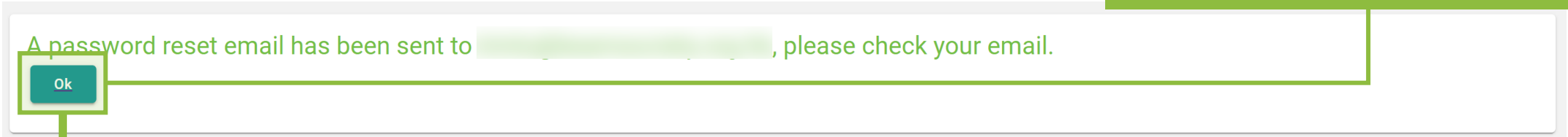
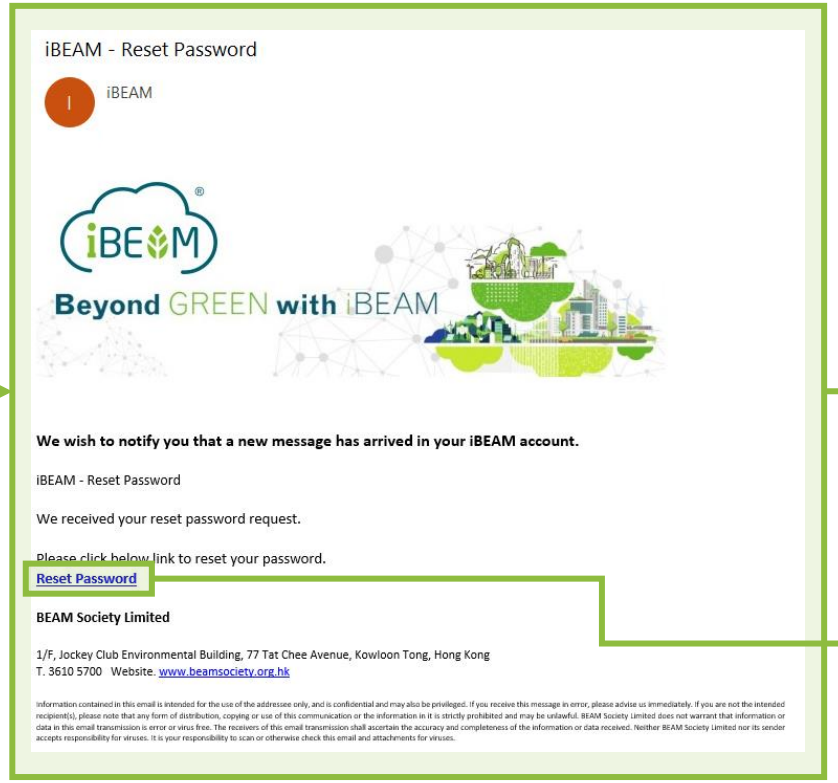
A2.3.2 Forgot Password

Step 4:
Click **OK** to confirm the sending of the password reset e-mail to the designated e-mail account address





Tips:

The reset password notification may be filtered out by email spam filter. Please check the **junk folder** if the reset password notification does not appear in the inbox within **5 minutes** of executing the forgot password function. Additionally, please ensure that **ibeam@beamsociety.org.hk** is added as a safe sender in the email setting.

Step 5:
Check e-mail for a reset password message.
Click the **Reset Password** link to reset password

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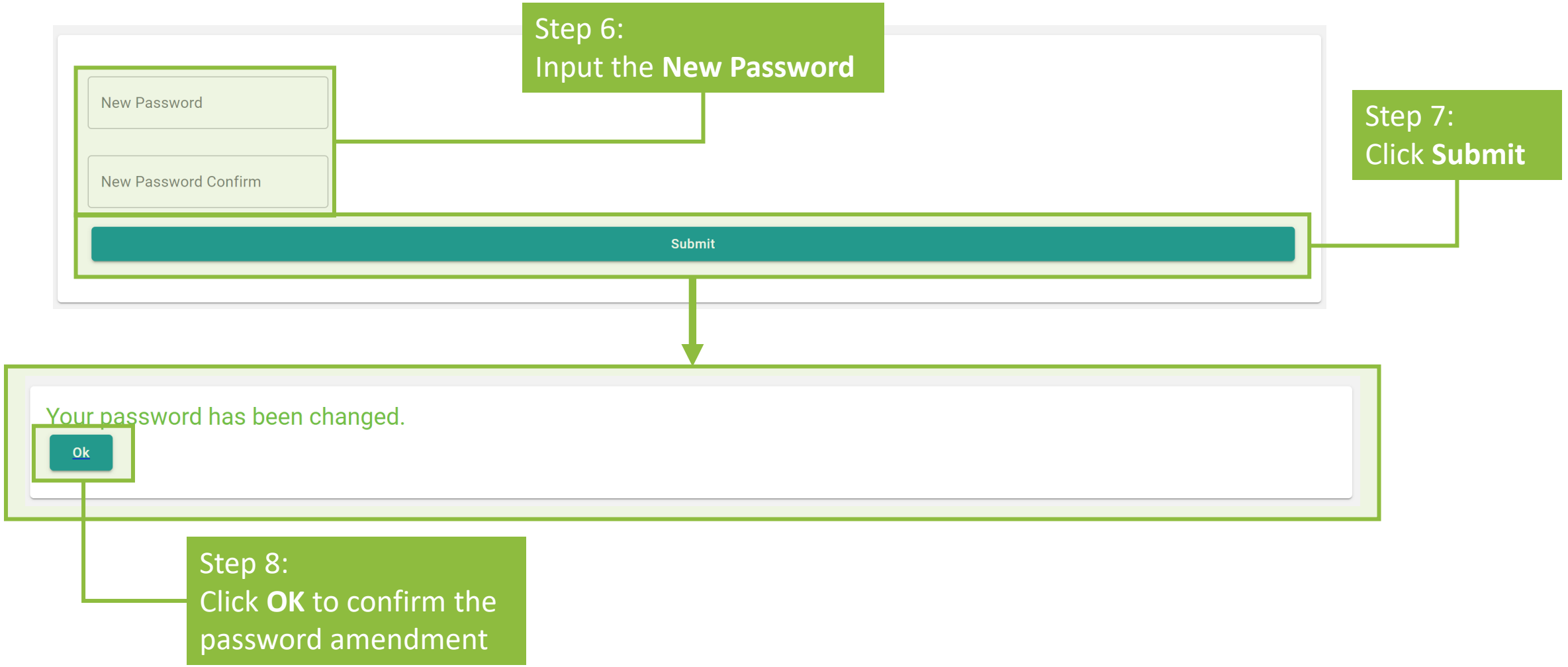
A2.3.3 Forgot Password



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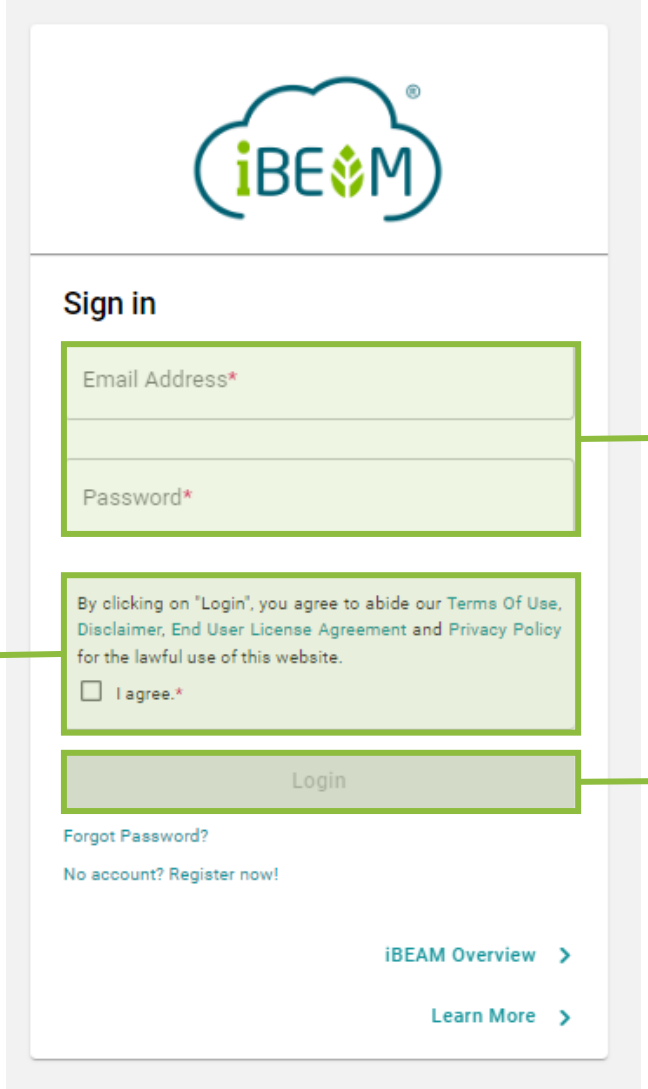
A2.3.4 Forgot Password



Step 9:
Go to the login page and use the **new password** to log in to iBEAM

Step 10:
Click the **Checkbox** to confirm that you agree to abide our **Terms Of Use**, **Disclaimer**, **End User License Agreement** and **Privacy Policy**

Step 11:
Click **Login**

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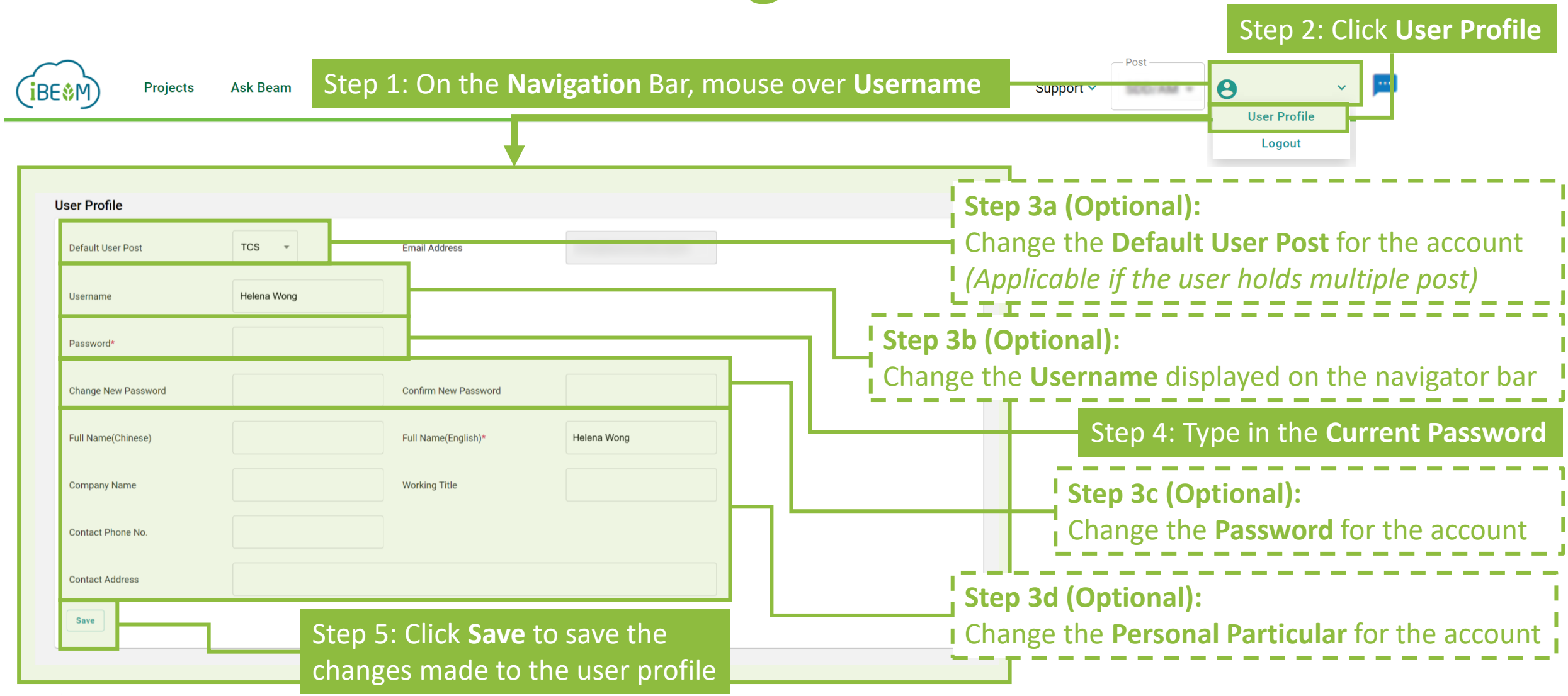
A2.4 User Profile Management



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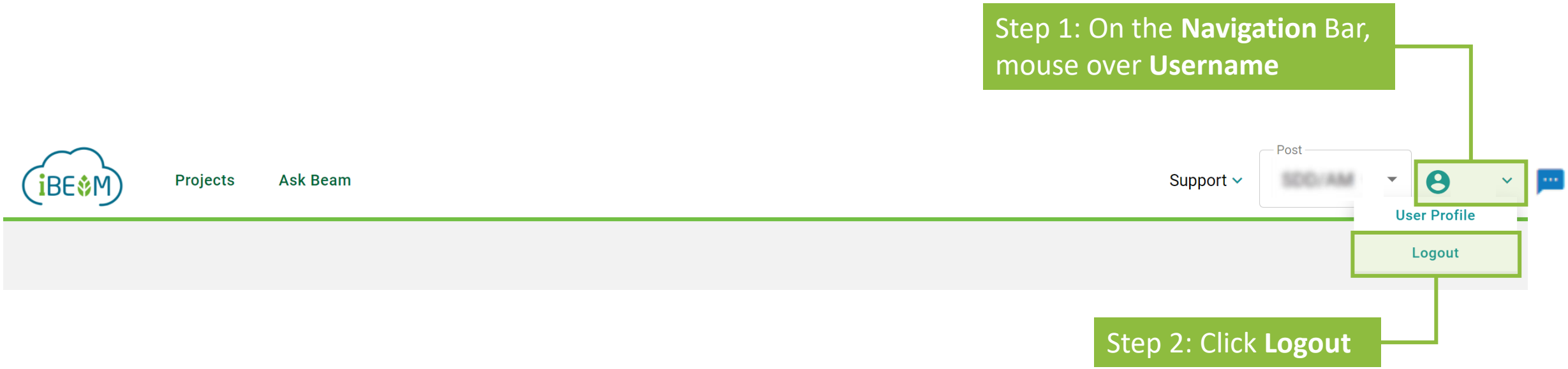
A2.5 Log Out



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Section A3 Contract and Finance

This section provides guidance in settling contract and financial issues on the iBEAM.

A3.1 Download Agreement

A3.2 Upload Signed Agreement

A3.3 Invoice and Payment

A3.4 Download Receipt

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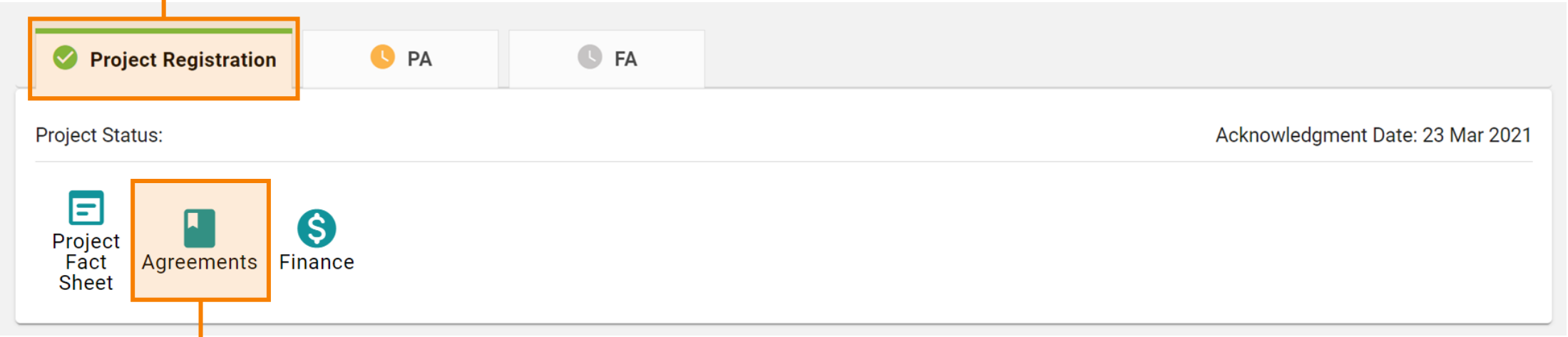
A3.1.1 Download Agreement

Step 1:
Click the **Project Registration** tab under the project status element



Step 2:
Click **Agreements**

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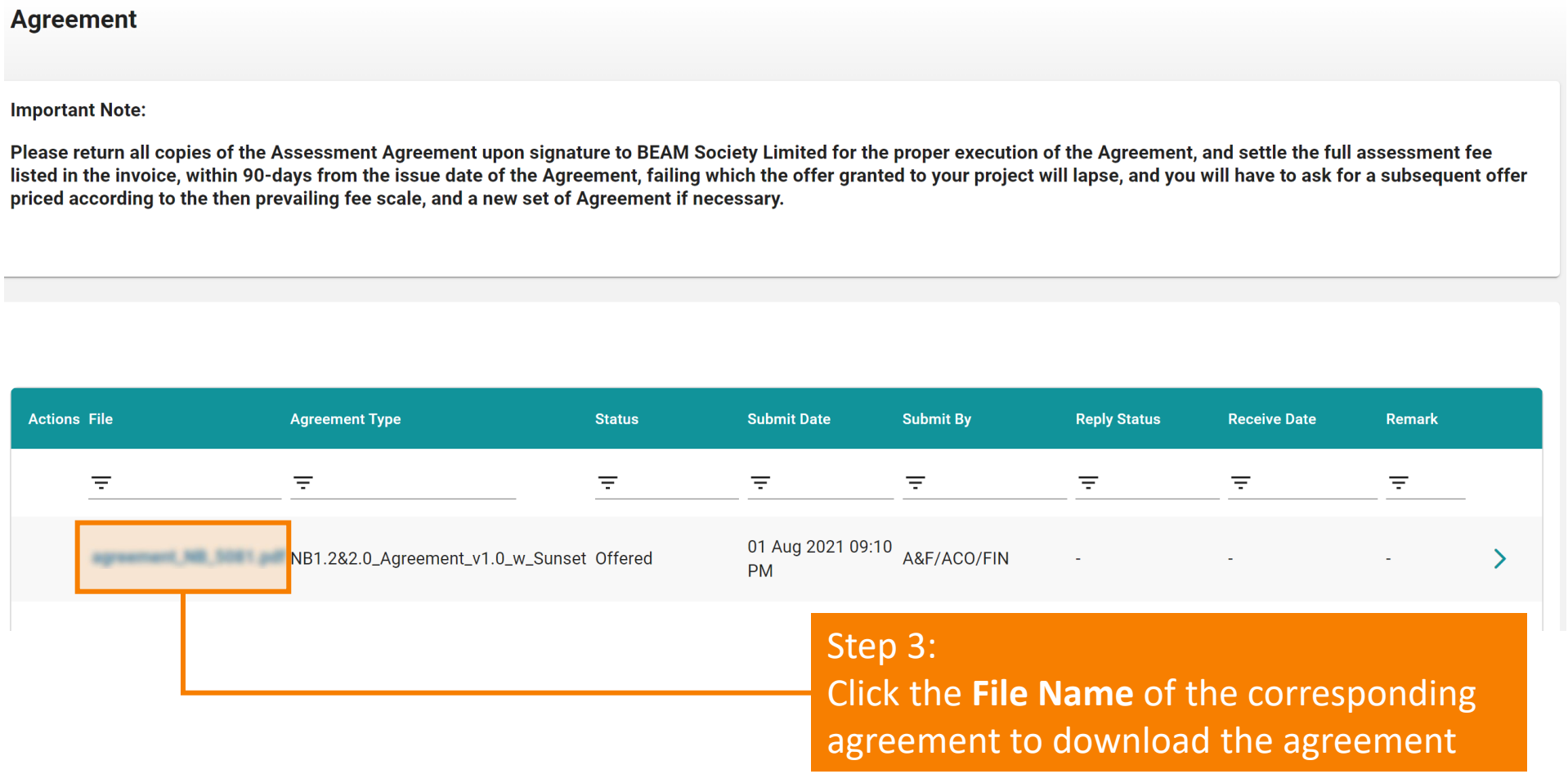
A3.1.2 Download Agreement



Step 3:
Click the **File Name** of the corresponding agreement to download the agreement

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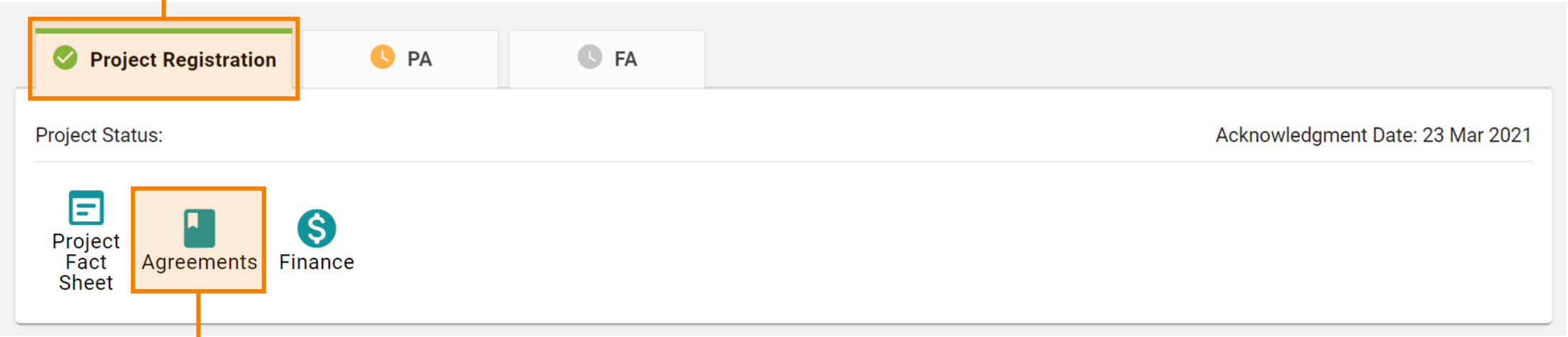
A3.2.1 Upload Signed Agreement

Step 1:
Click the **Project Registration** tab under the project status element



Step 2:
Click **Agreements**

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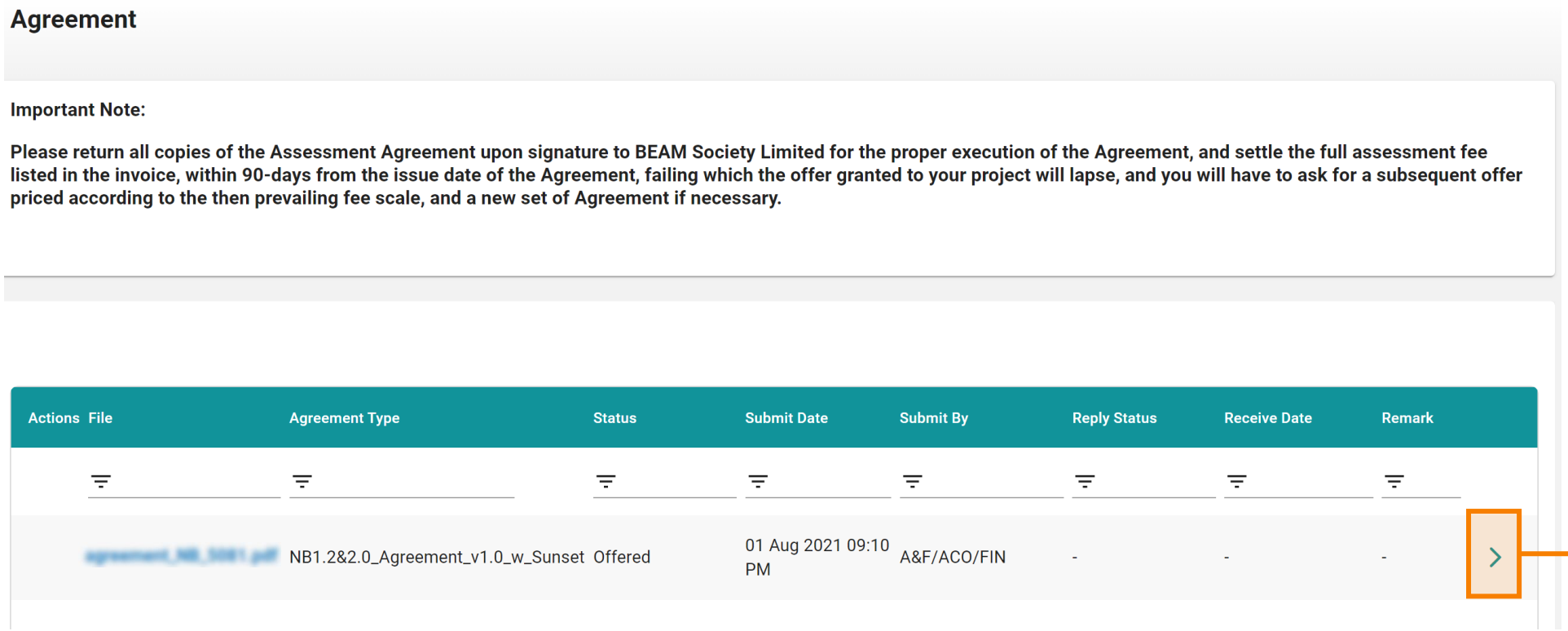
A3.2.2 Upload Signed Agreement



Step 3:
Click **>** to prepare the uploading of the signed agreement

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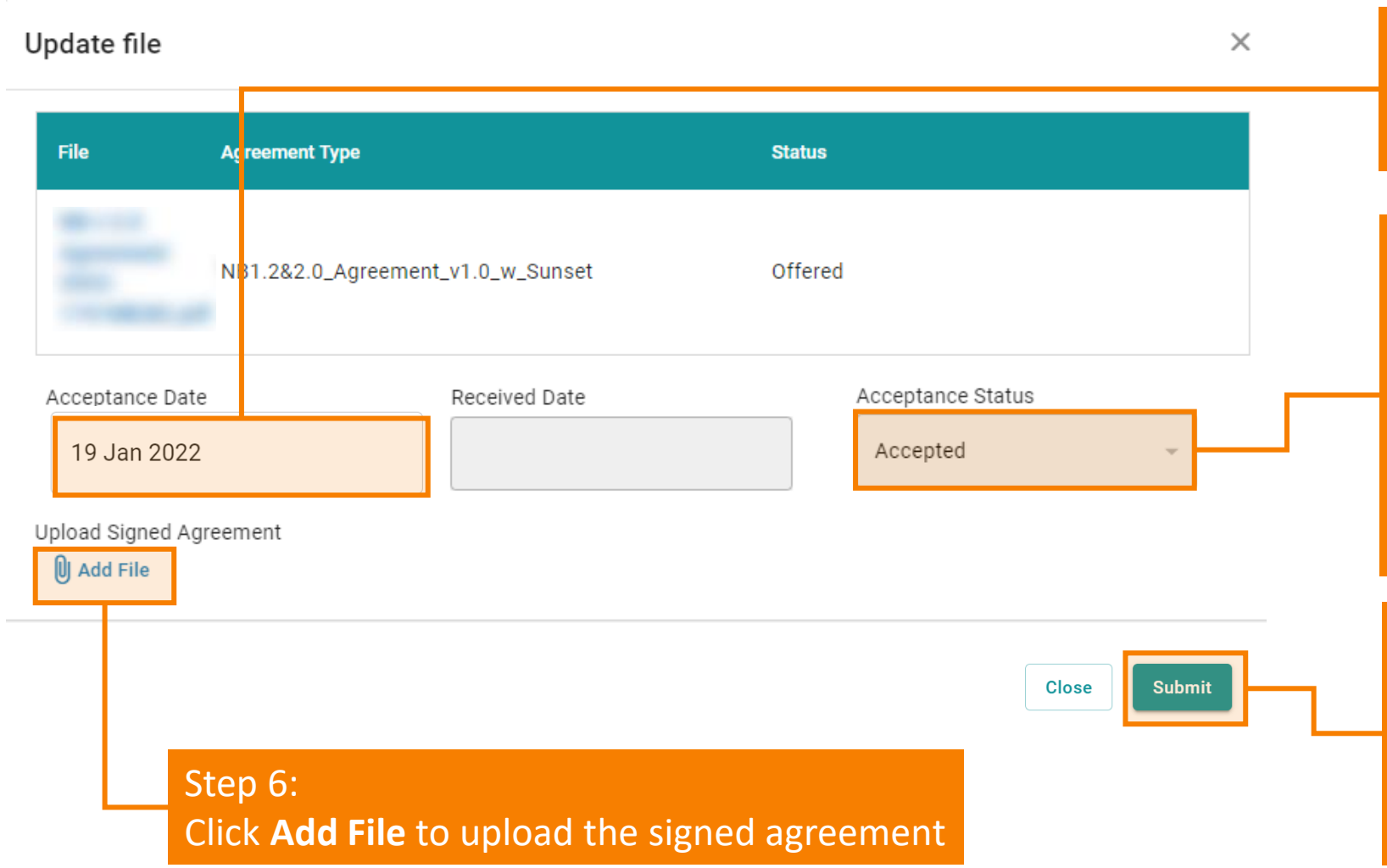
A3.2.3 Upload Signed Agreement



Step 4:
Input the **Acceptance Date** of the agreement

Step 5:
Select the **Status** of the updated agreement
(***Accepted*** *for accepting the offered agreement and sending the agreement to BSL for review /* ***Draft*** *for saving the agreement for future editing)*

Step 6:
Click **Add File** to upload the signed agreement

Step 7:
Click **Submit** to submit the signed agreement for BSL's review or save the changes to the uploaded agreement for future editing

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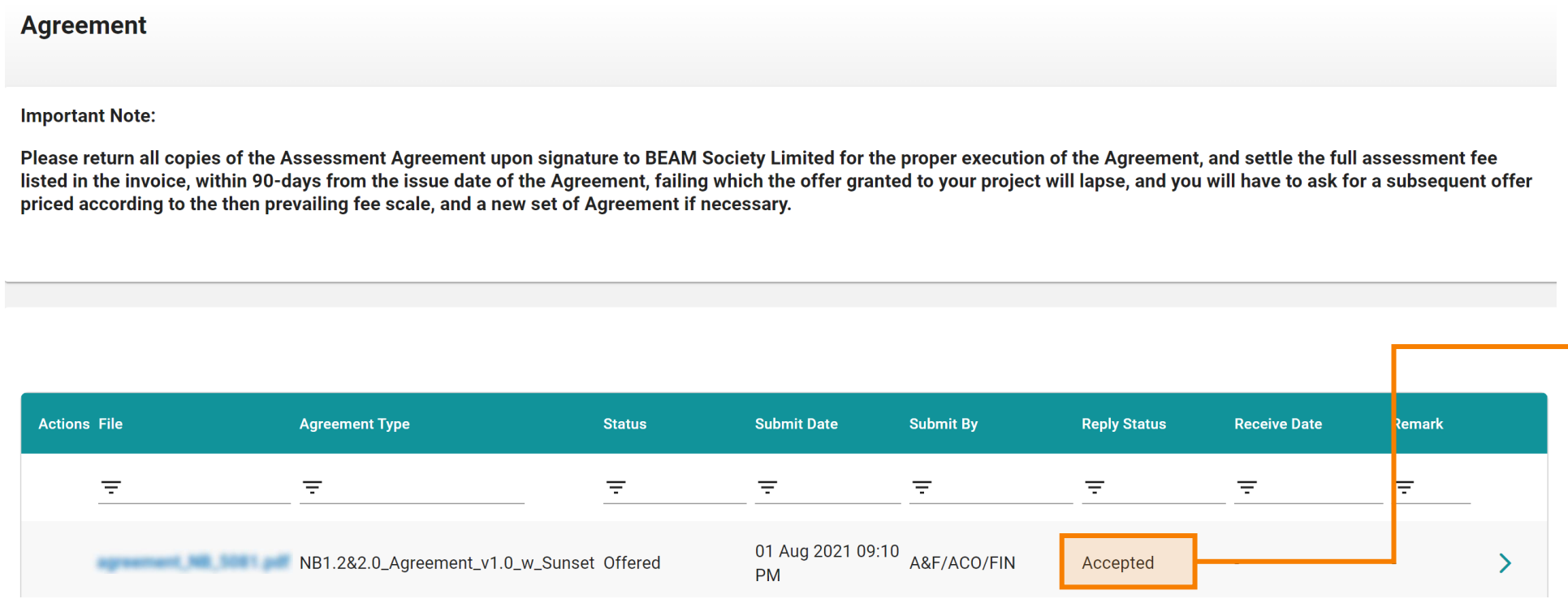
A3.2.4 Upload Signed Agreement



Step 8:
Once the agreement has been accepted by iBEAM, the reply status for the corresponding agreement will change to **Accepted**

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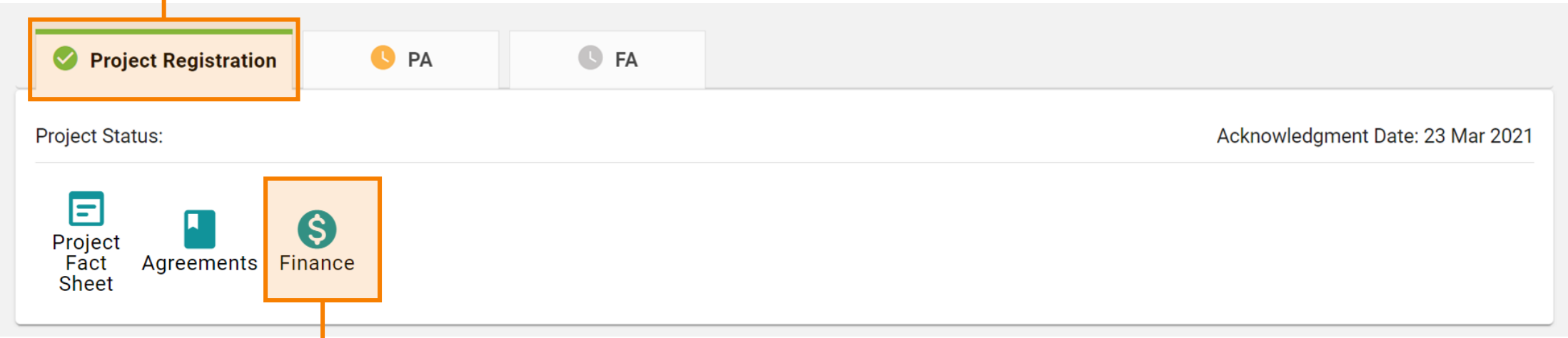
A3.3.1 Invoice and Payment

Step 1:
Click **Project Registration** tab under the project status element



Step 2:
Click **Finance**

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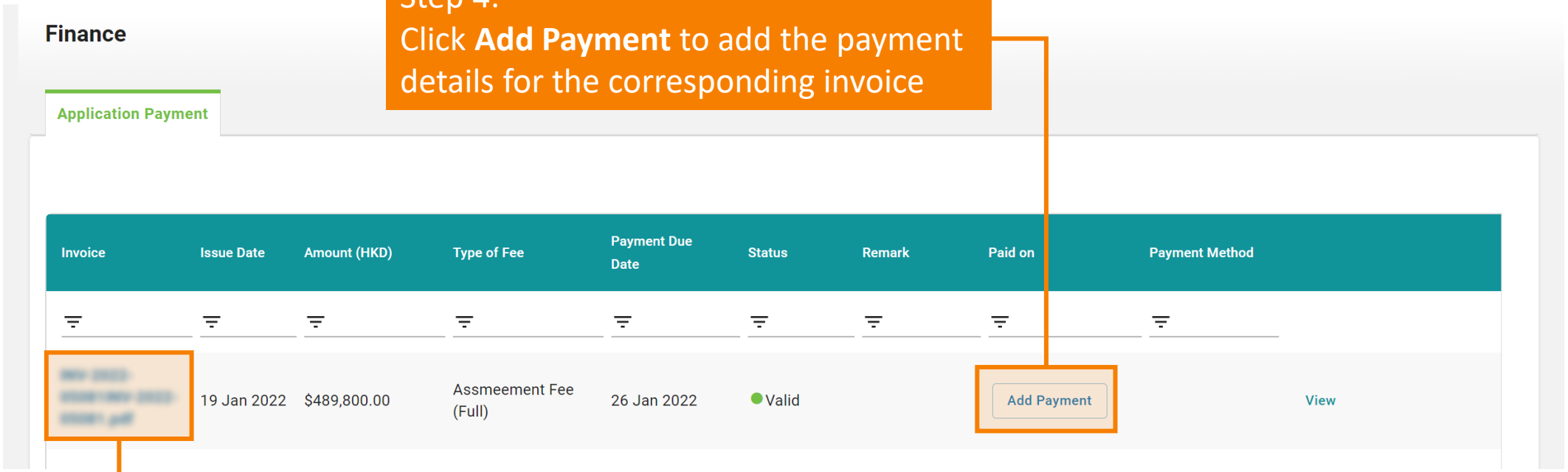
A3.3.2 Invoice and Payment

Step 4:
Click **Add Payment** to add the payment details for the corresponding invoice



Step 3:
Click the **File Name** of the corresponding invoice to download the invoice

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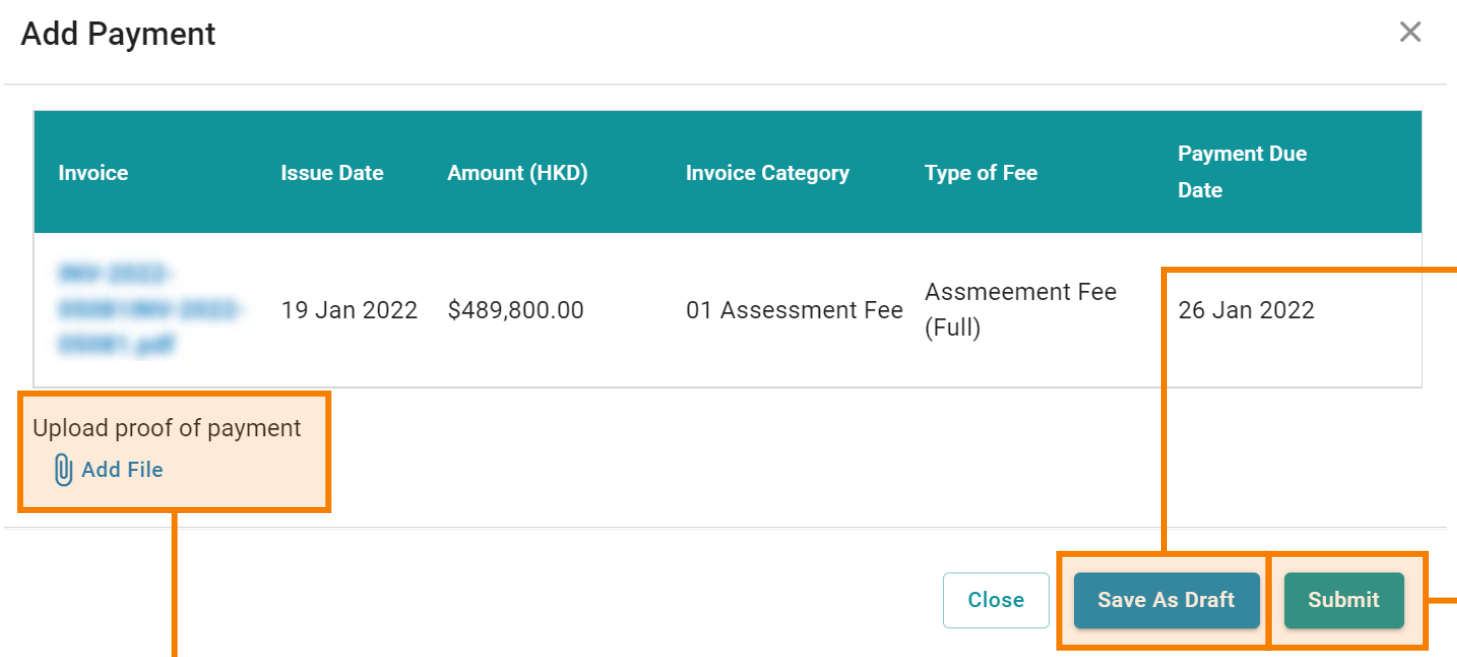
A3.3.3 Invoice and Payment



Step 6b (Optional):
Click **Save as Draft** to save the invoice for further internal editing

Step 6a:
Click **Submit** to post the payment for BSL's review

Step 5:
Upload the **Proof of Payment** *(e.g. scanned e-cheque, payment records, etc.)* to demonstrate that the invoice has been settled

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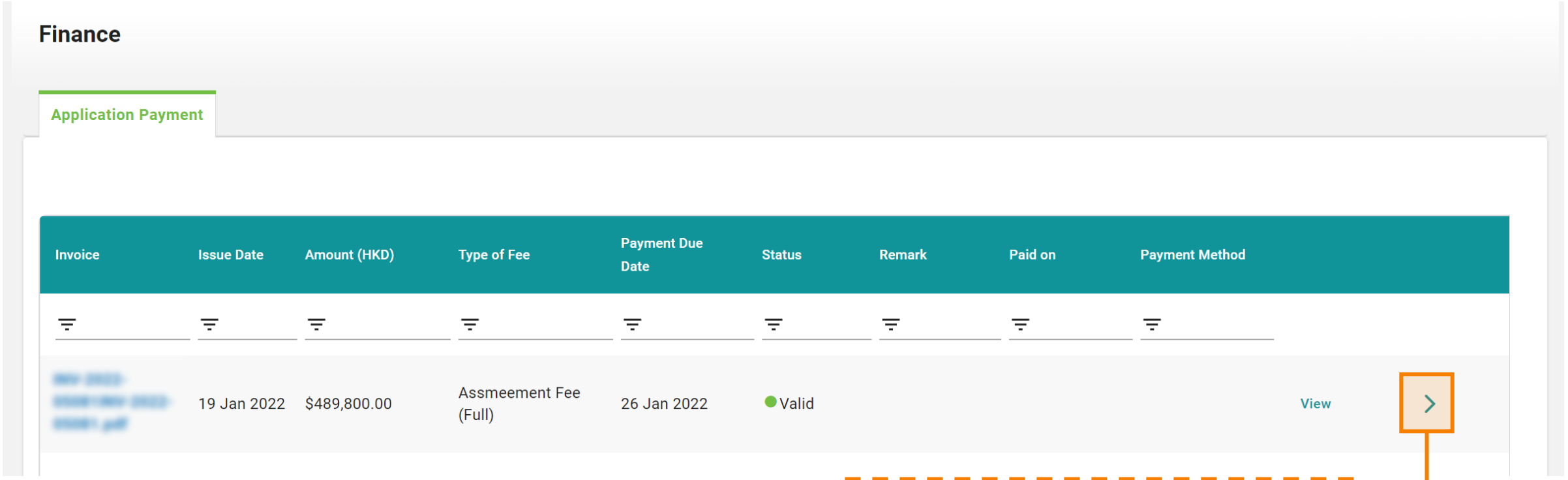
A3.3.4 Invoice and Payment



Step 7a (Optional):
In the finance panel, click **>** to validate the uploaded proof of payment

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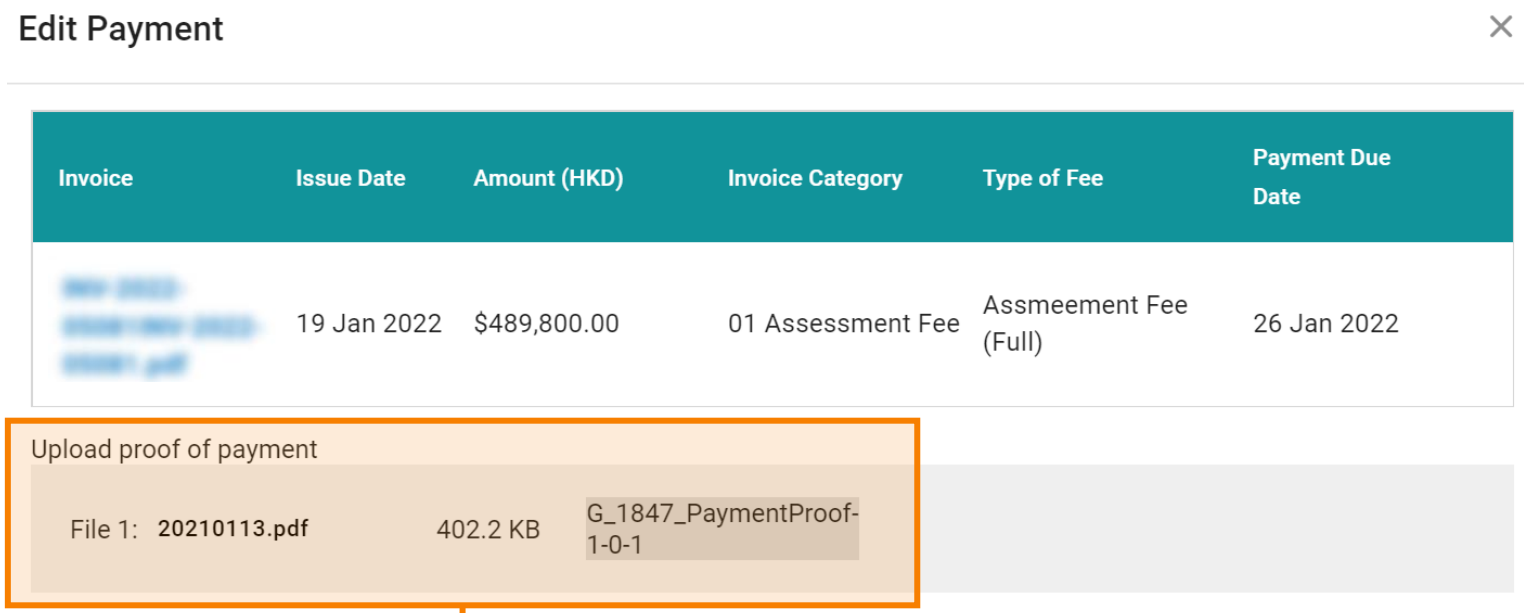
A3.3.5 Invoice and Payment



Step 8a (Optional):
Confirm the uploaded proof of payment

Step 9a (Optional):
Close the dialogue box

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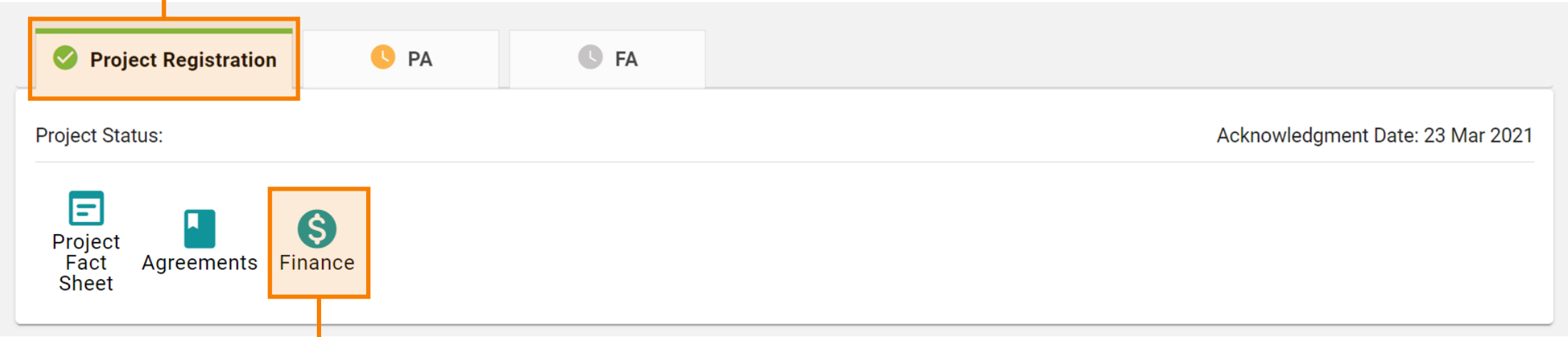
A3.4.1 Download Receipt

Step 1:
Click **Project Registration** tab under the project status element



Step 2:
Click **Finance**

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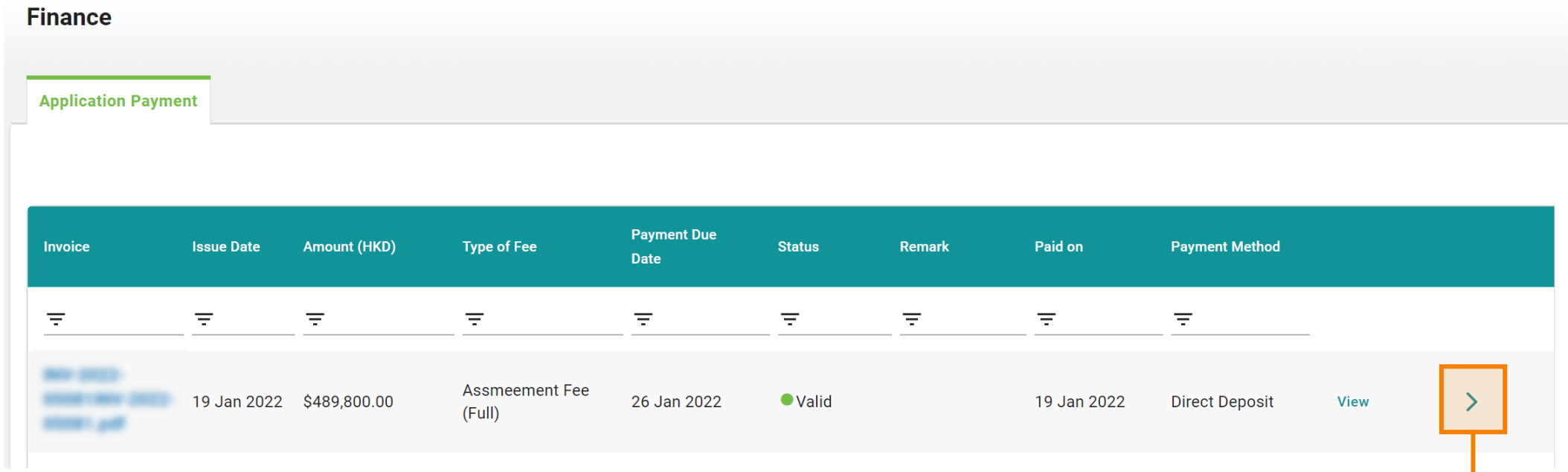
A3.4.2 Download Receipt



Step 3:
Click **>** to view the payment details

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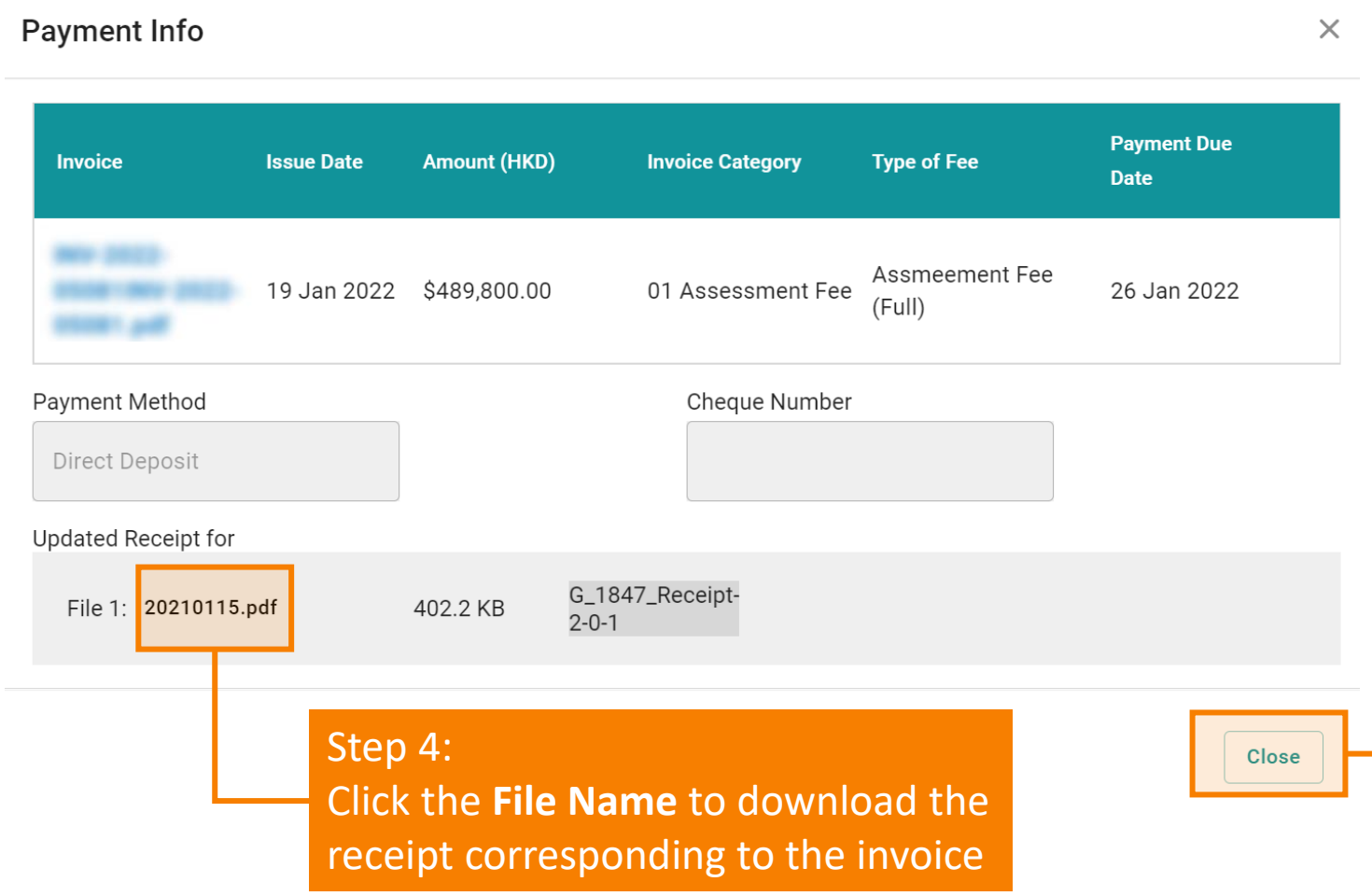
A3.4.3 Download Receipt



Step 4:
Click the **File Name** to download the receipt corresponding to the invoice

Step 5:
Close the dialogue box

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Section A4 Credit Interpretation Request (CIR)

This section lays down the steps and procedures in preparing a CIR on the iBEAM.

A4.1 CIR Dashboard

A4.2 Filing a CIR under a Specific Project

A4.3 Rejection of CIR

A4.4 Processing of CIR

A4.5 Applying a CIR onto a Specific Project

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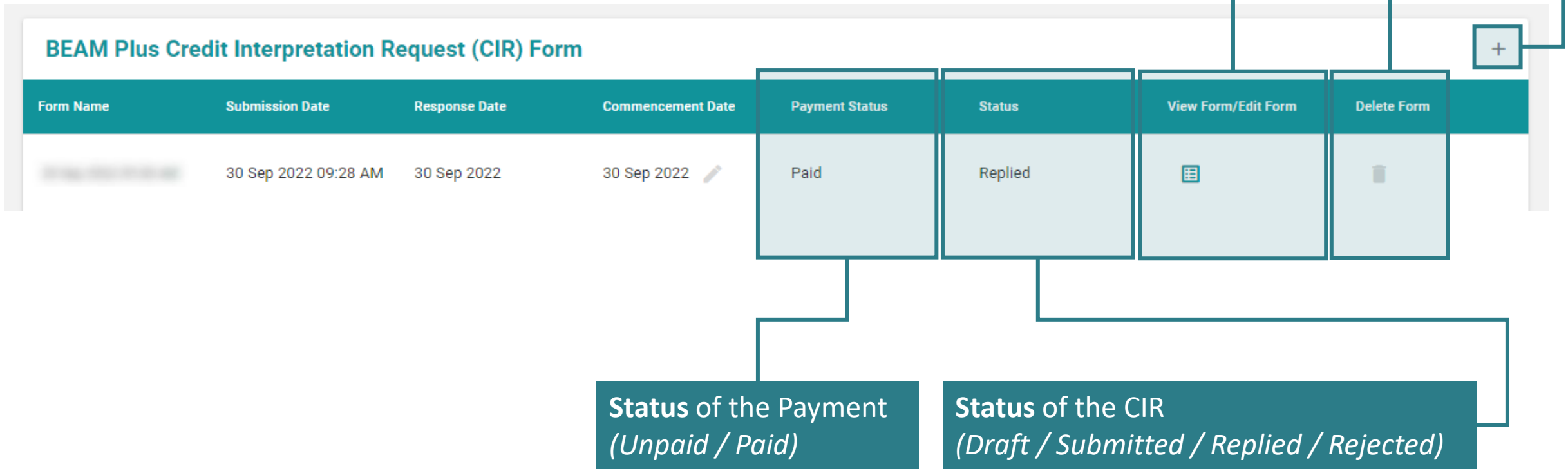
A4.1 CIR Dashboard

Delete the CIR form
*(Applicable if **Draft** is shown under the **Status**)*

Edit the content of the CIR *(Applicable if **Draft** is shown under the **Status**)*
/ View the content of the CIR

File a new CIR



Status of the Payment
(Unpaid / Paid)

Status of the CIR
(Draft / Submitted / Replied / Rejected)

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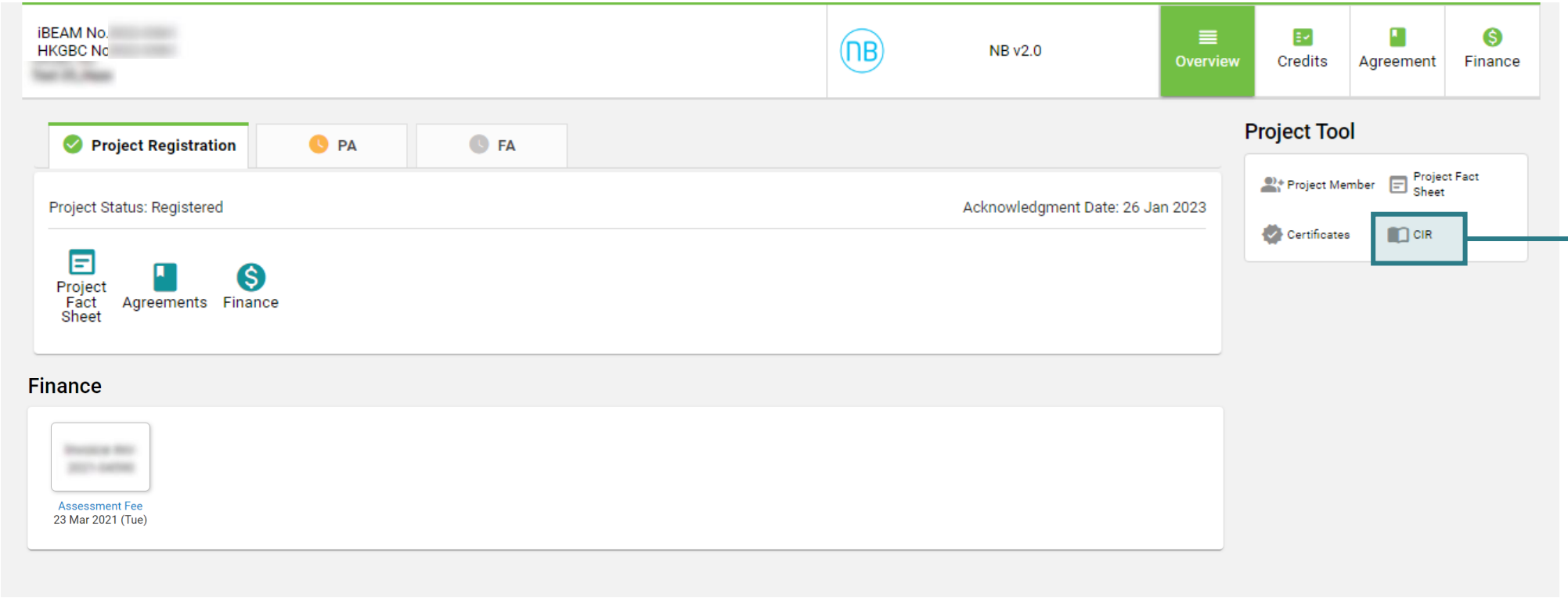
A4.2.1 Filing a CIR under a Specific Project



Step 1:
In the project dashboard, click **CIR** in the function element

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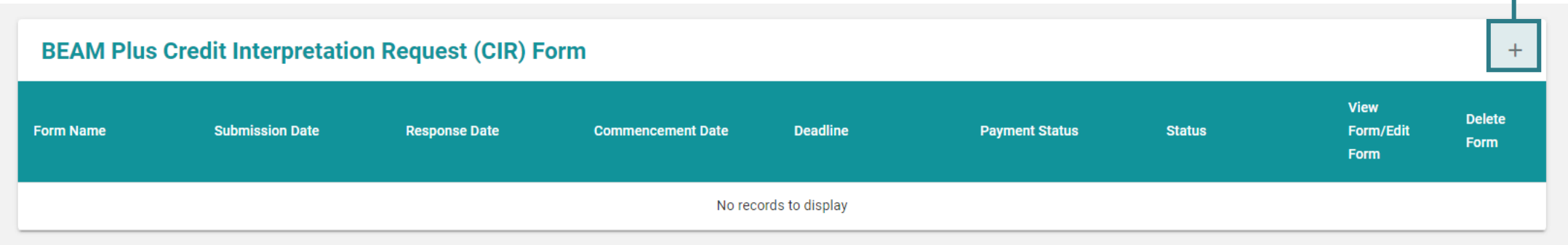
A4.2.2 Filing a CIR under a Specific Project

Step 2:
Click + to file a new CIR



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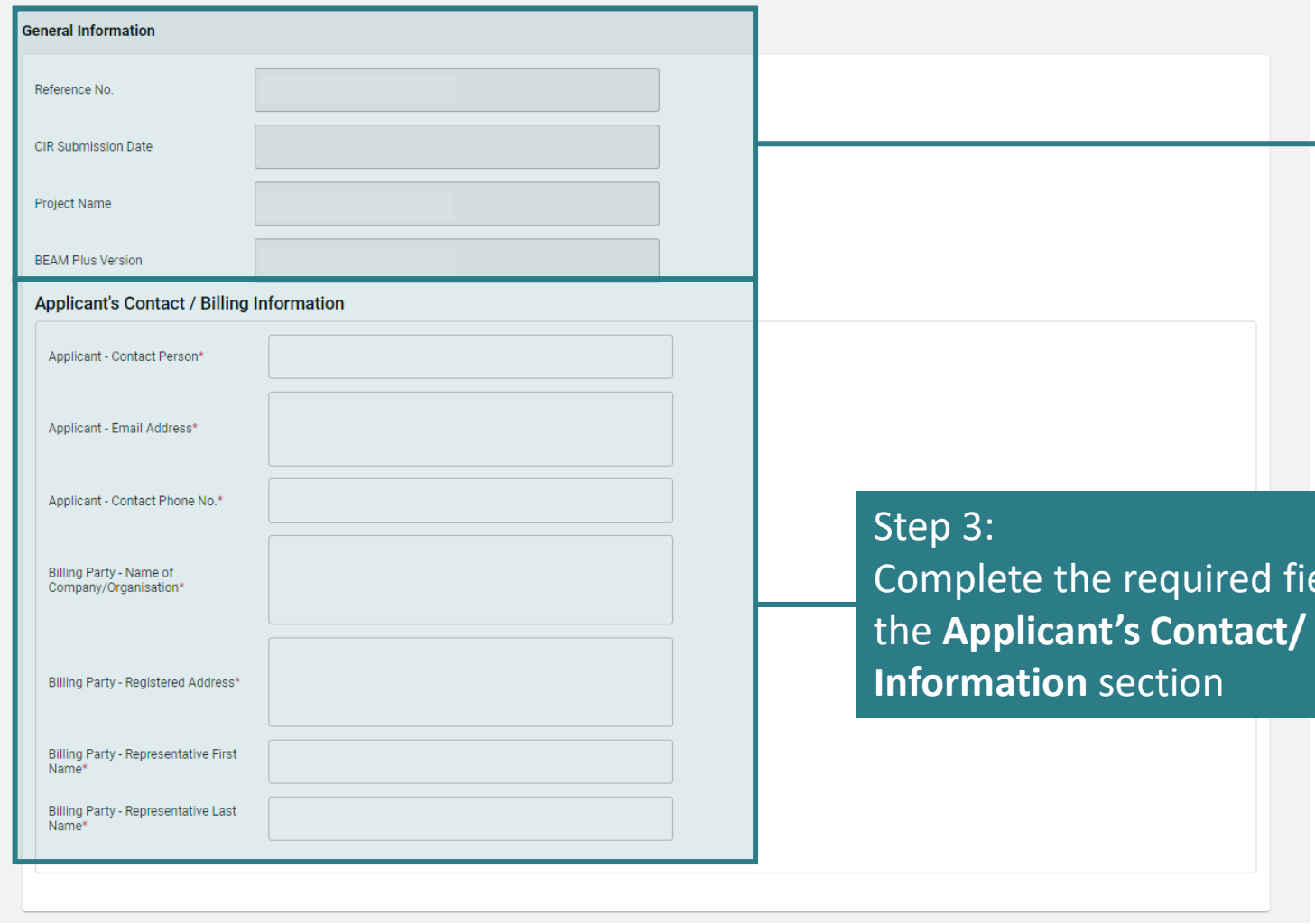
A4.2.3 Filing a CIR under a Specific Project



Step 3:
Complete the required field under the **Applicant's Contact/ Billing Information** section

Tips:

Please countercheck the information under the **General Information** section of the CIR form to ensure that the CIR is filing under the appropriate project.

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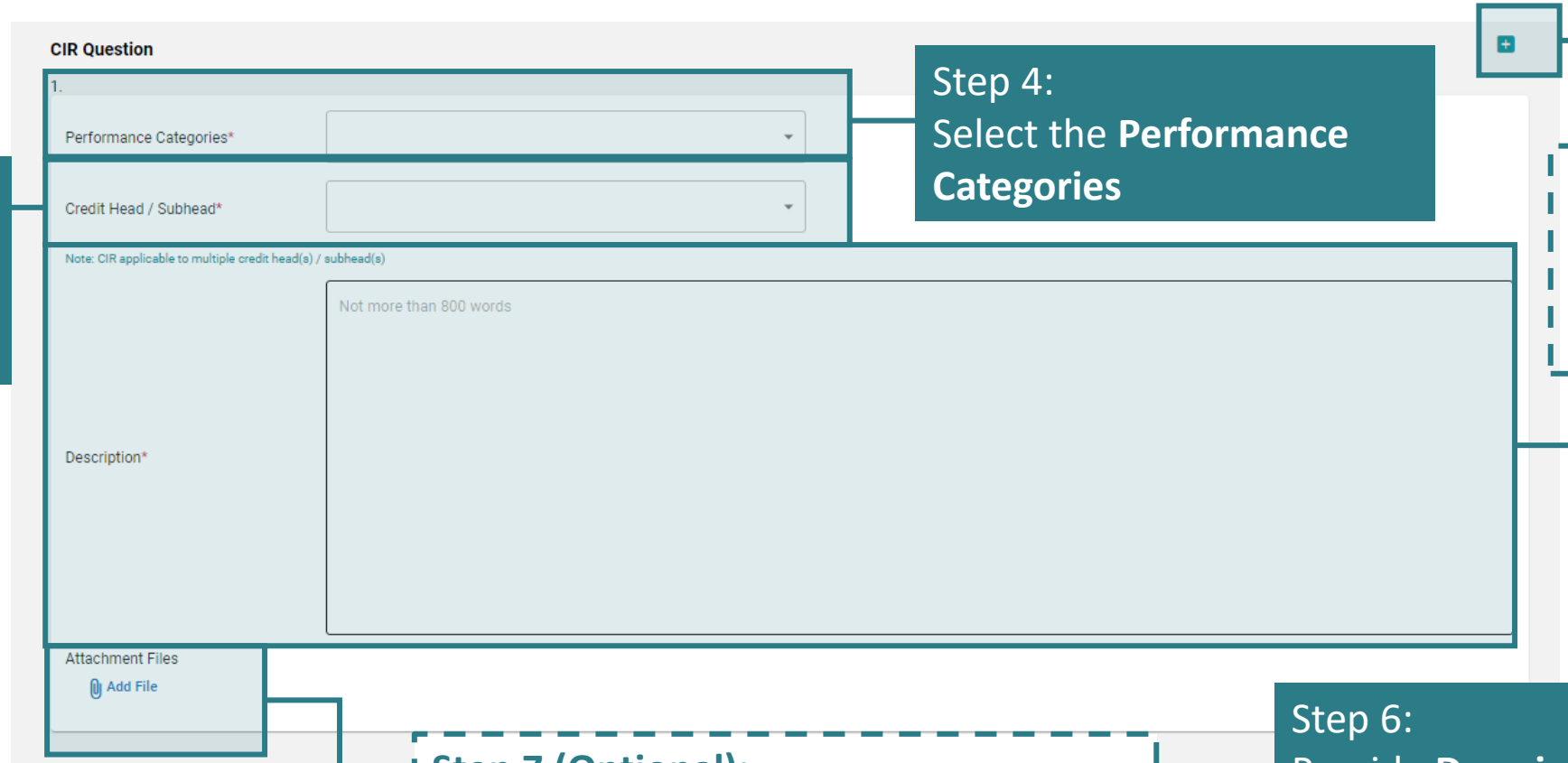
A4.2.4 Filing a CIR under a Specific Project



Step 4:
Select the **Performance Categories**

Step 5:
Select the **Credit Head** or **Subhead**

Step 8 (Optional):
Click **+** to add **additional CIR question**

Step 6:
Provide **Description** of the CIR

Step 7 (Optional):
Add attachment **files** to support the CIR

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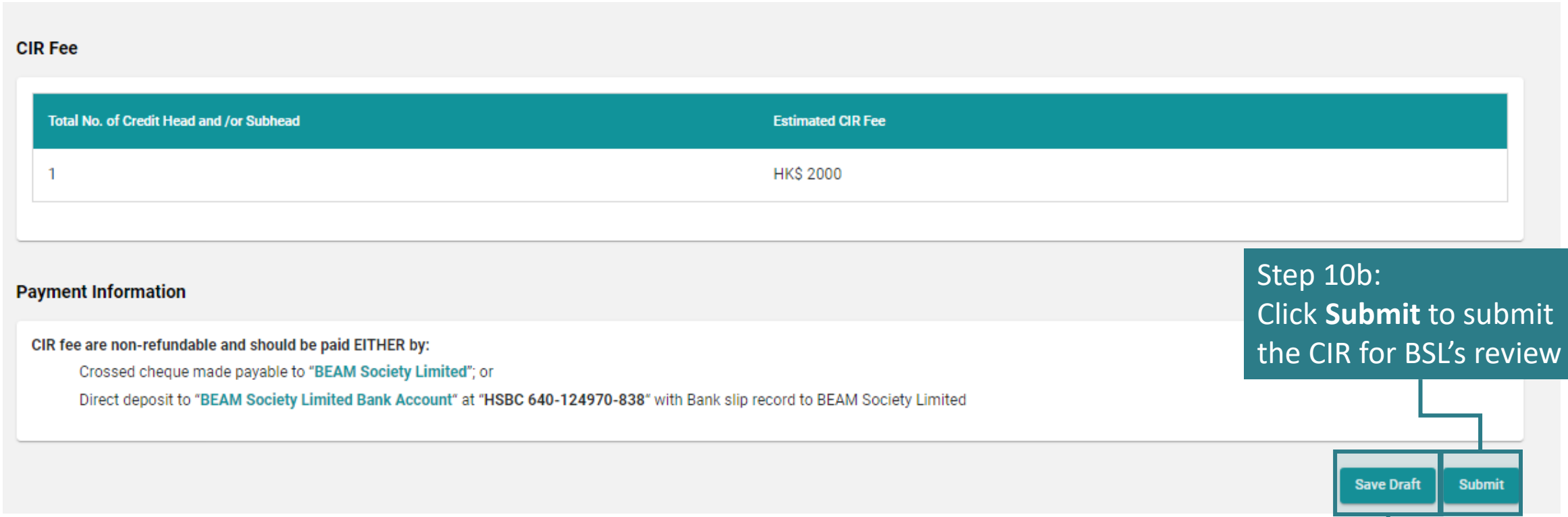
A4.2.5 Filing a CIR under a Specific Project



Step 10b:
Click **Submit** to submit the CIR for BSL's review

Step 10a (Optional):
Click **Save Draft** to edit the CIR later

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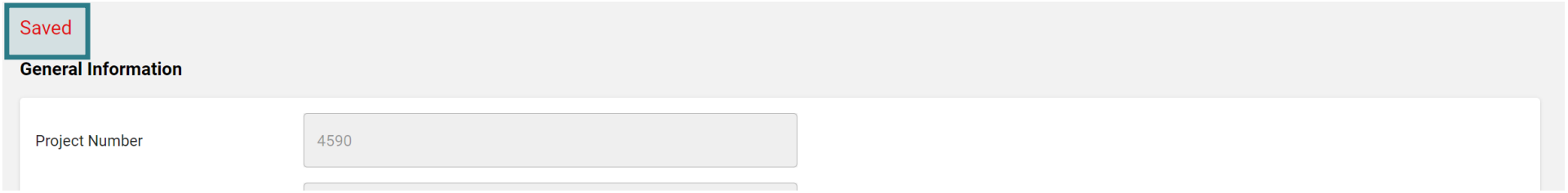
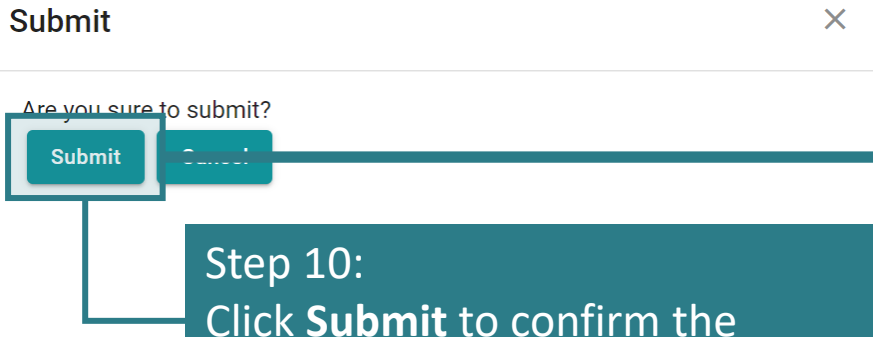
A4.2.6 Filing a CIR under a Specific Project

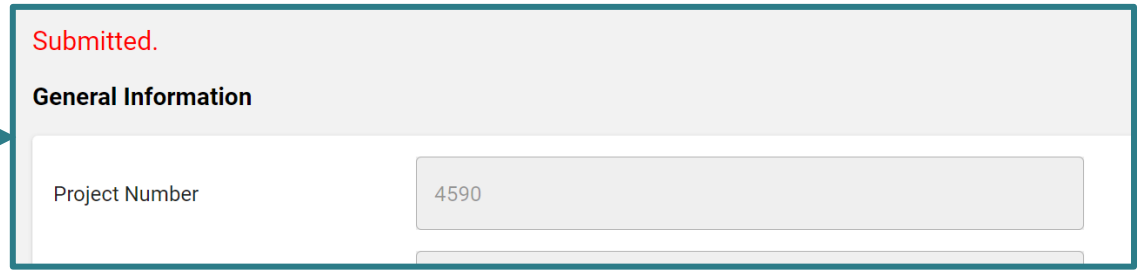
(a) After clicking the **Saved Draft** under **Step 9a**, Saved should be displayed on top of general information.



(b) After clicking the **Submit** under **Step 9b**, a warning dialogue box will pop up.



Step 10:
Click **Submit** to confirm the submission of CIR for BSL's review



Upon confirmation of the CIR submission, Submitted should be displayed on top of general information.

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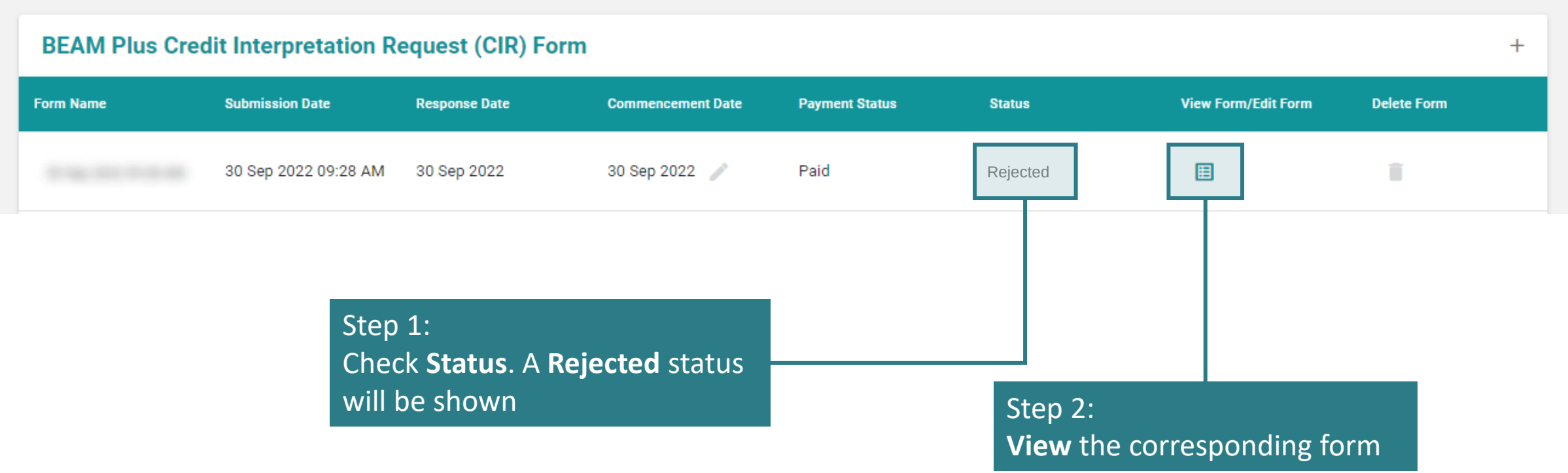
A4.3.1 Rejection of CIR



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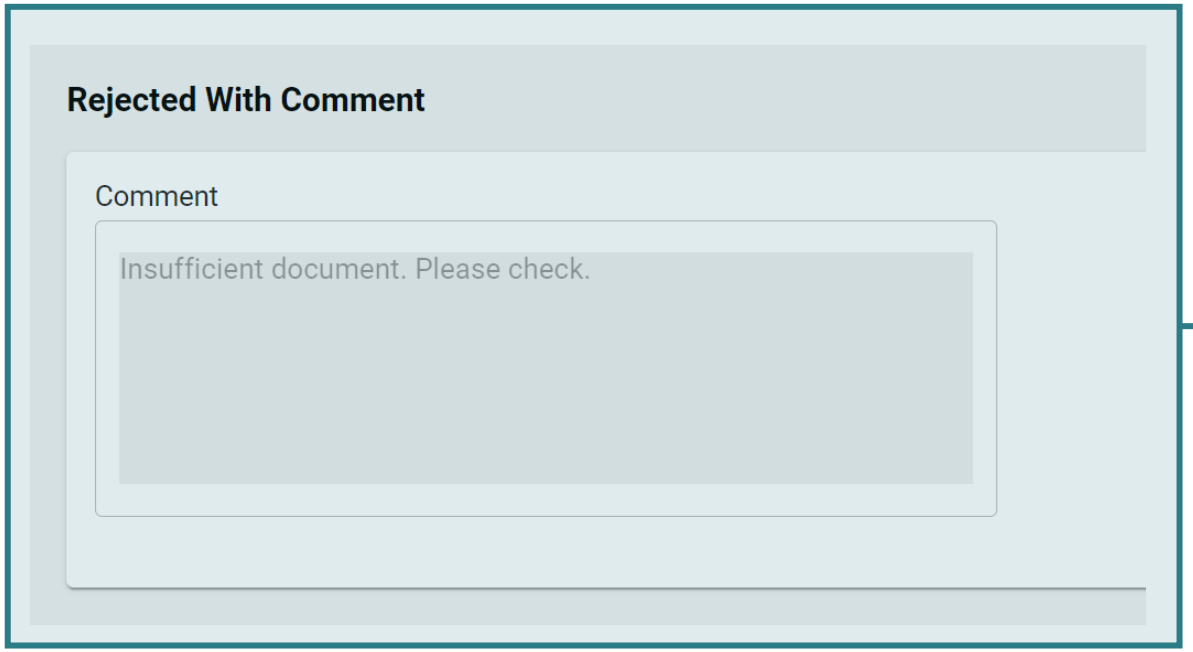
A4.3.2 Rejection of CIR



Step 3:
Scroll down to the **bottom of the form**.
Reason for the rejection will be stated for review

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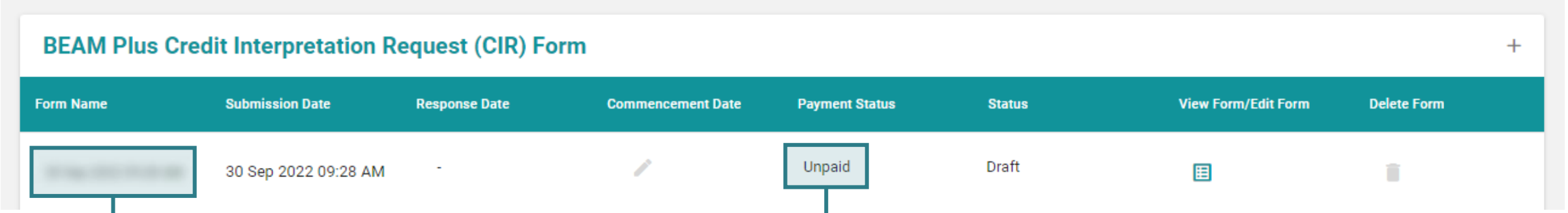
A4.4.1 Processing of CIR



Step 1:
Check the associated CIR form number.

Step 2:
Check **Payment Status**. An **Unpaid** payment status will be shown reminding Applicant to settle the payment to the CIR

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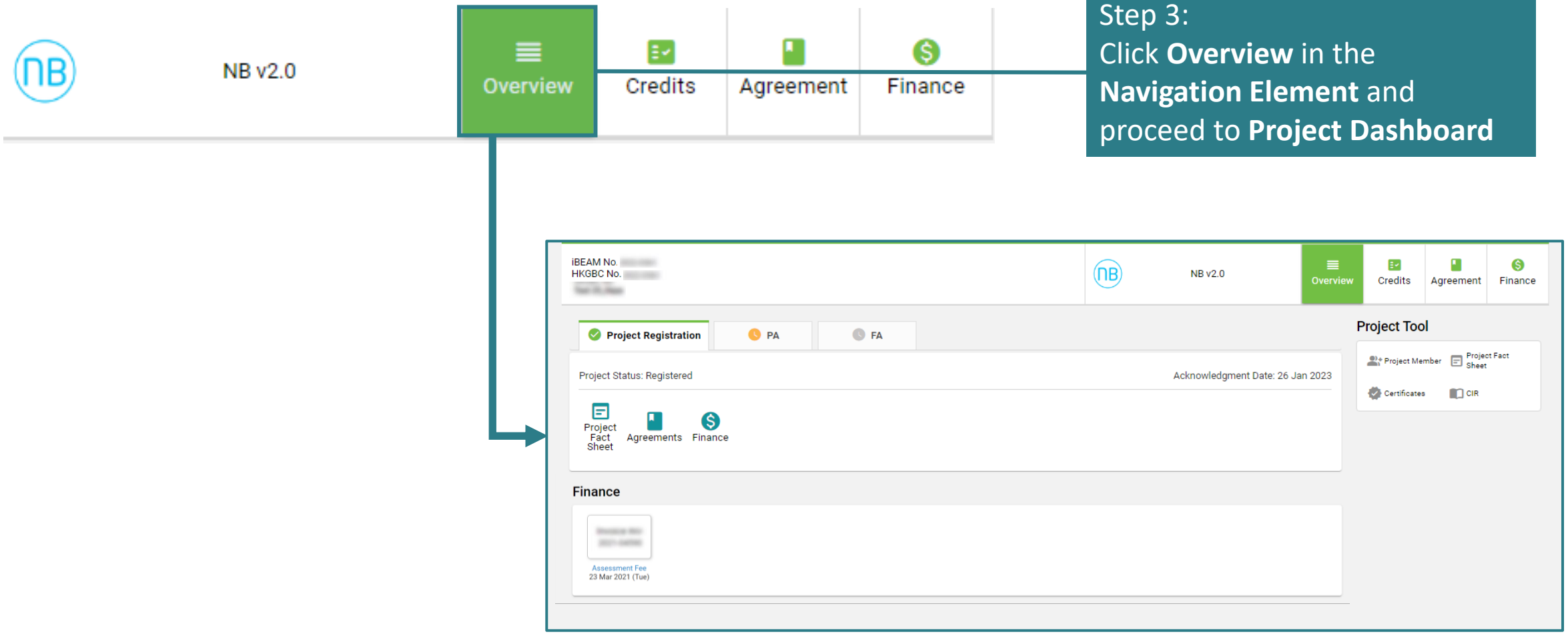
A4.4.2 Processing of CIR



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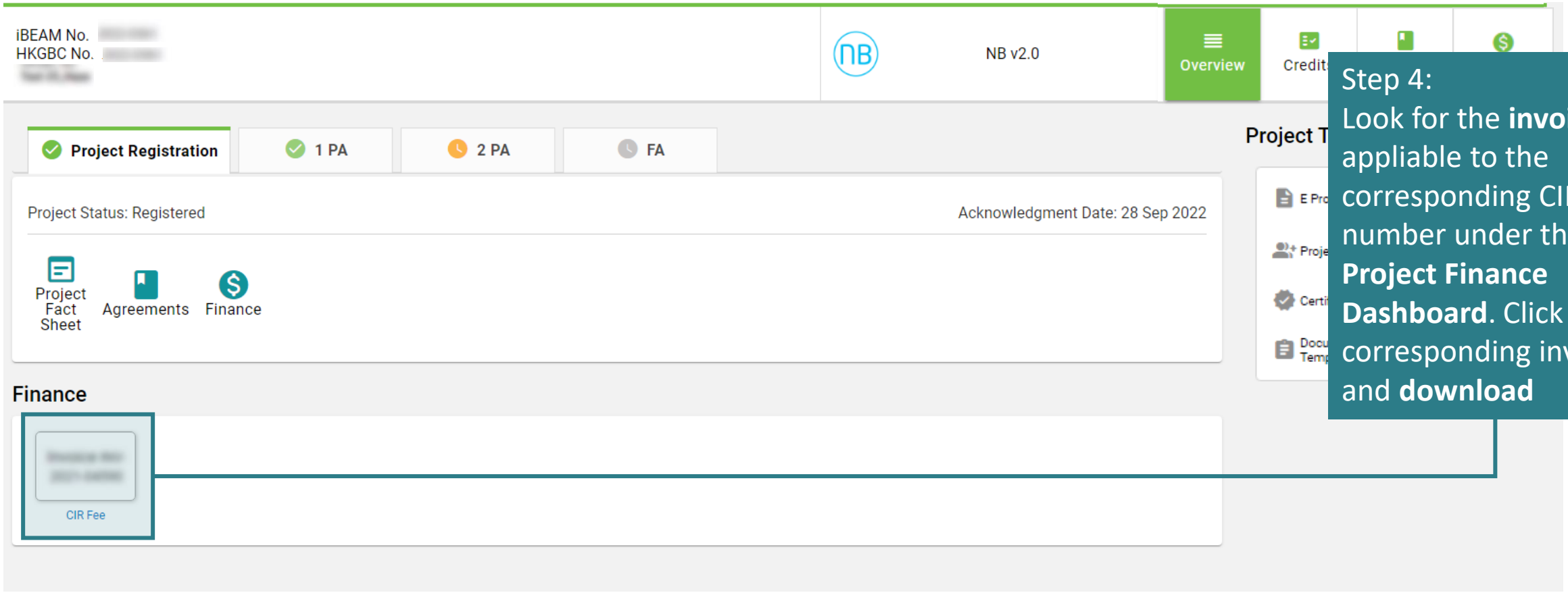
A4.4.3 Processing of CIR



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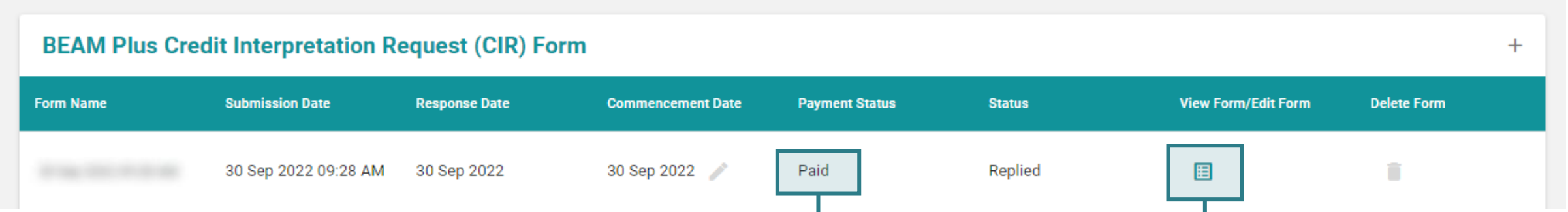
A4.4.4 Processing of CIR



Step 5:
Once the CIR invoice has been settled, a status of **Paid** will be shown under the **Payment Status**. The invoice for the CIR has been successfully settled

Step 6:
View the corresponding CIR form

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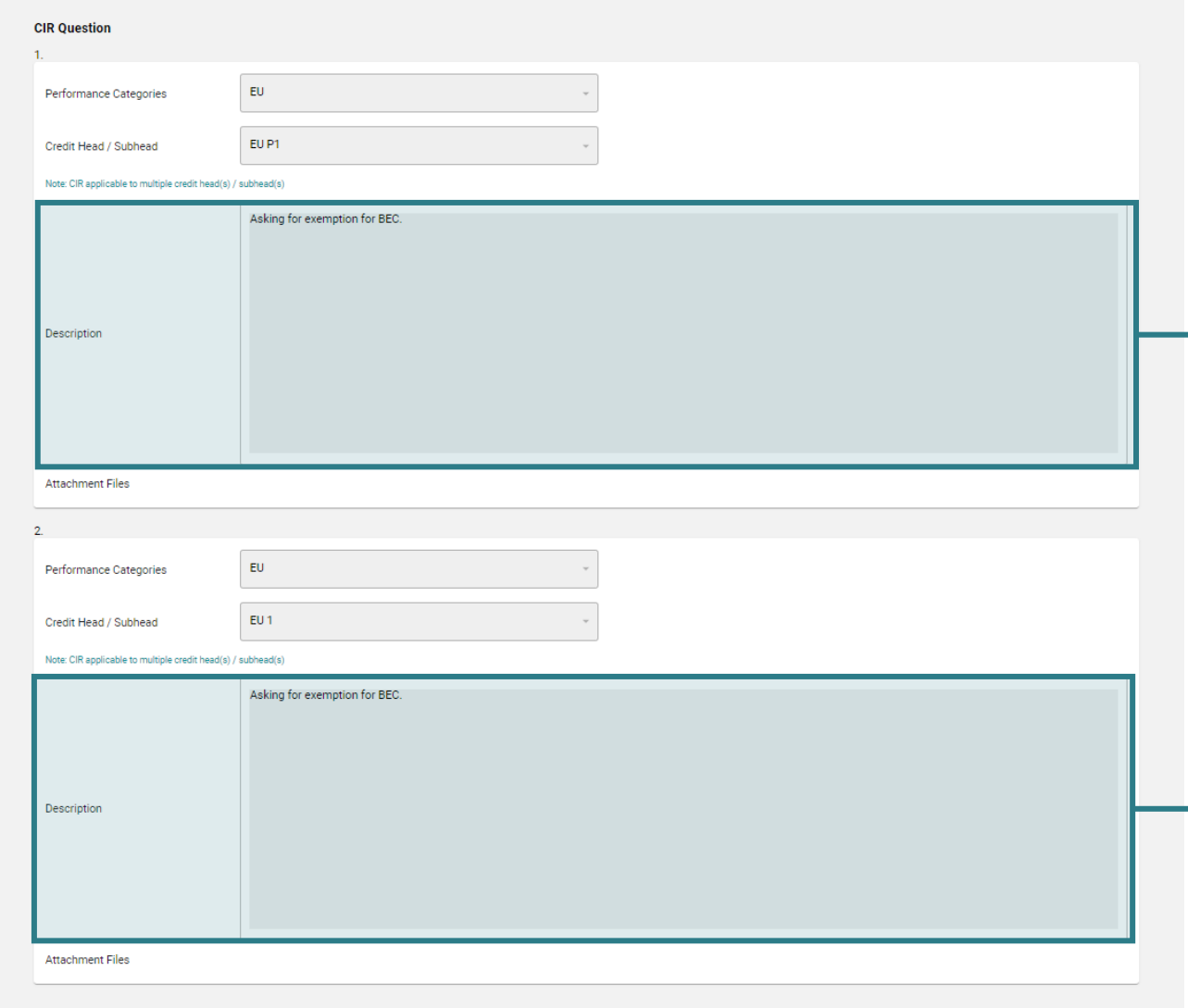
A4.4.5 Processing of CIR



Step 7:
The corresponding **answer** will be displayed under the **CIR question** section of the CIR form

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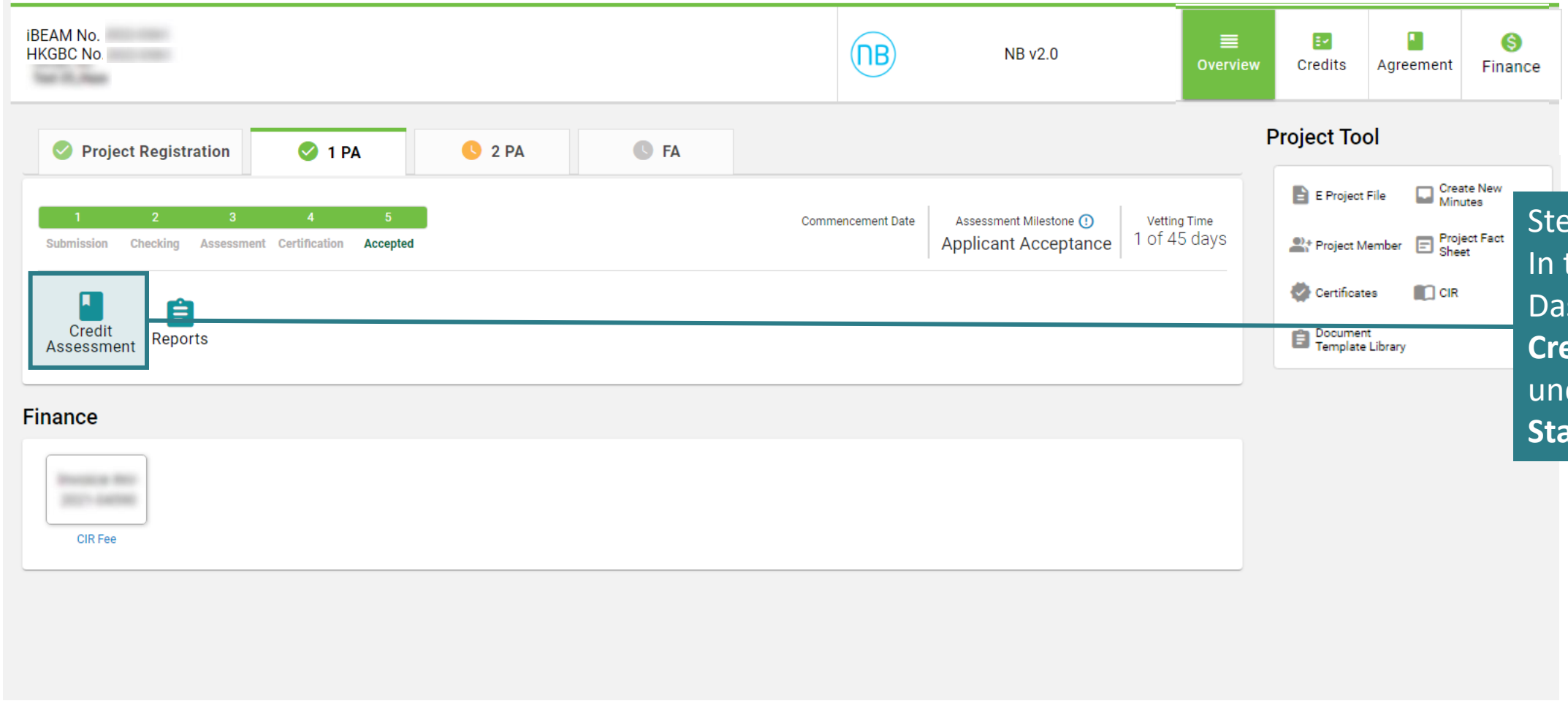
A4.5.1 Applying a CIR onto a Specific Project



Step 1:
In the Project Dashboard, click **Credit Assessment** under the **Project Status** element

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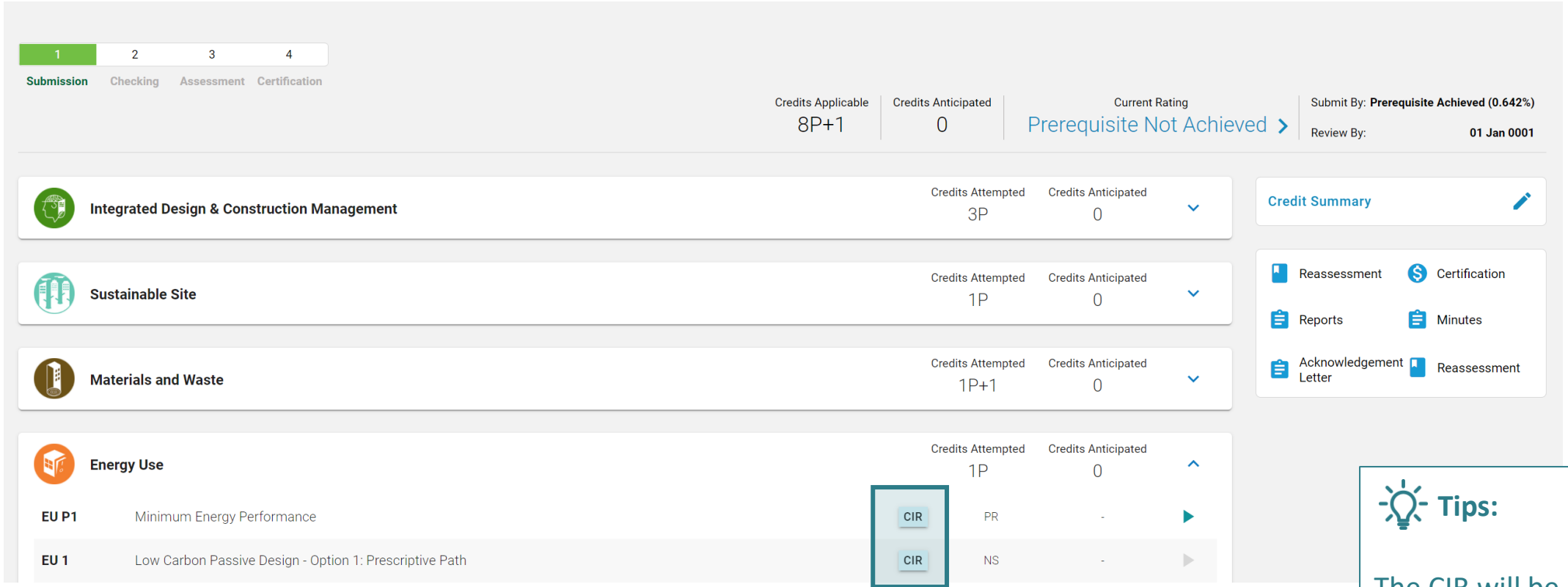
A4.5.2 Applying a CIR onto a Specific Project



Step 2:
Click the **CIR** to access the CIR information for the applicable credits

Tips:

The CIR will be displayed only to those credits that have applied for a CIR.

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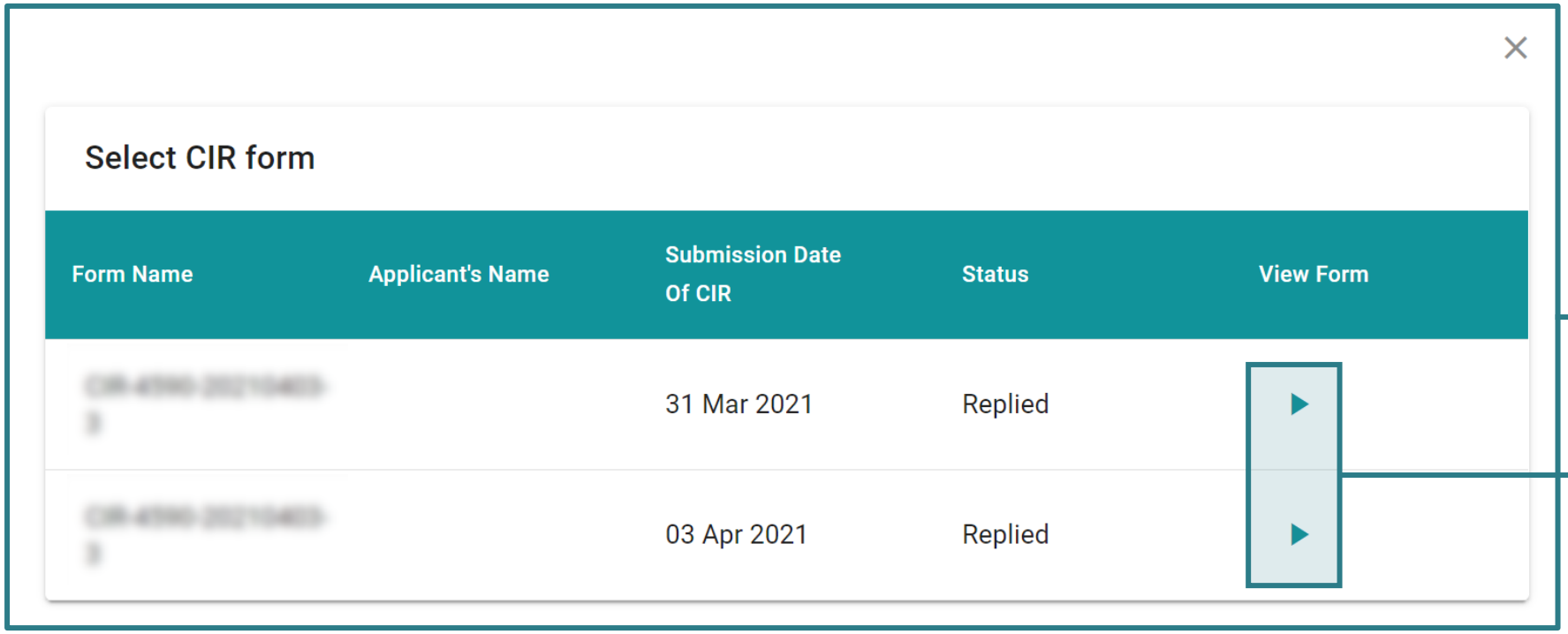
A4.5.3 Applying a CIR onto a Specific Project



Tips:

The Select CIR form dialogue box will only be shown if the project has more than 1 CIR response issued.

Step 3 (Optional):
Select the **CIR** form

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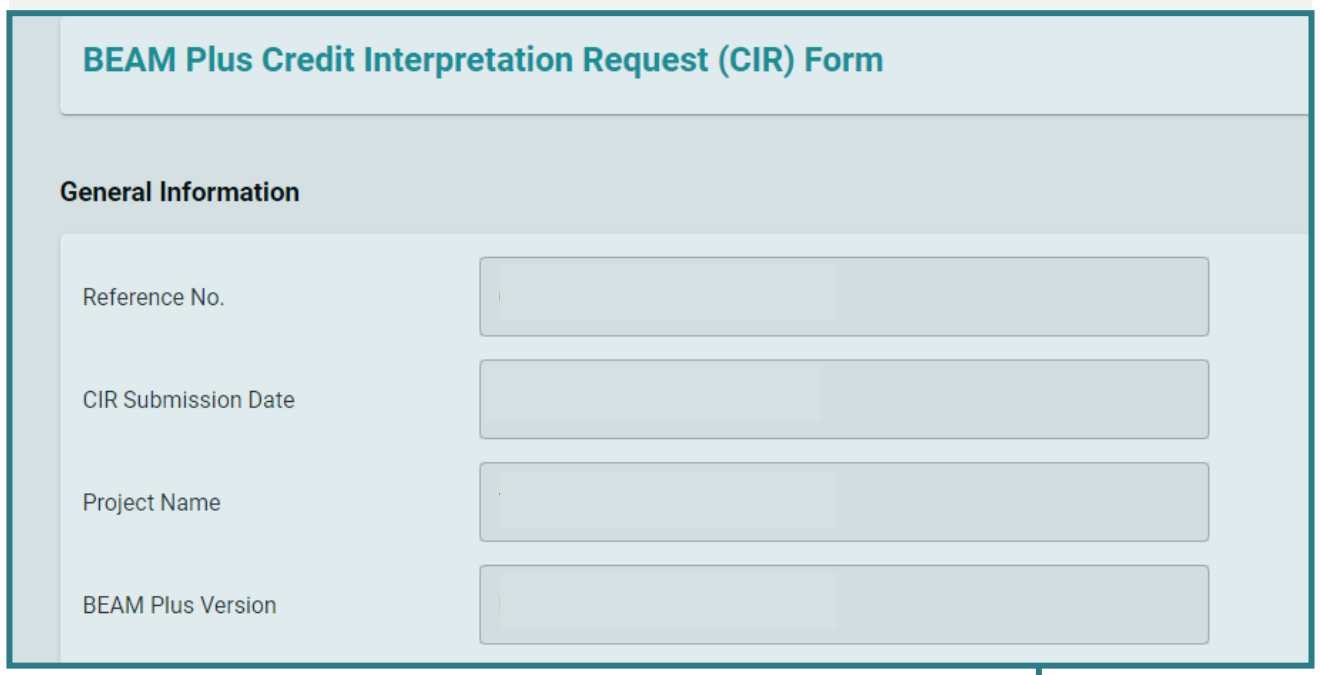
A4.5.4 Applying a CIR onto a Specific Project



Step 4:
The CIR information pertaining to the project and the corresponding credit will be **displayed**. The application of the CIR onto a specific project has been completed

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Section A5 Project Submission

This section lays down the steps and procedures in preparing a project submission on the iBEAM.

A5.1 Process Flow Overview

A5.2 Validating Project Information

A5.3 Project Member Management

A5.4 Pre-Submission

A5.5 Reply to Technical Checking

A5.6 Reply to BAS Comments

A5.7 Acceptance on Post TRC Comments

A5.8 Reply to Post TRC Comments

A5.9 Acceptance of Result

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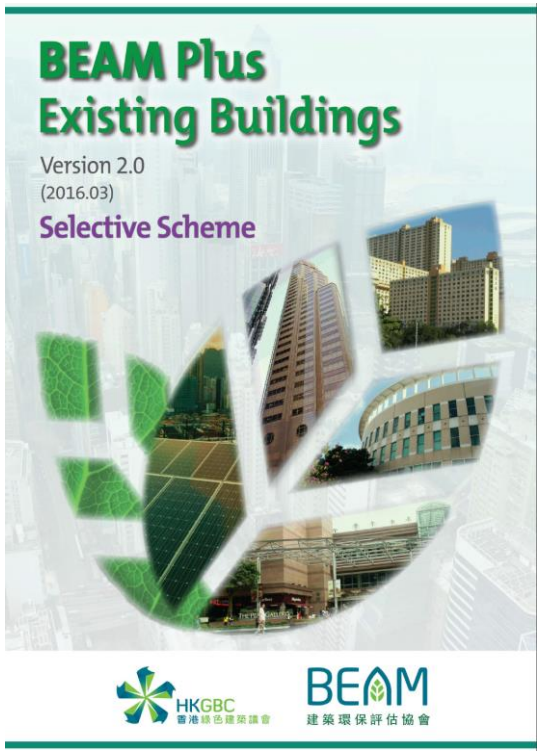
A5.1 Process Flow Overview

Click the booklet below to access the process flow for the corresponding assessment tool:



Portfolio Assessment
(MAN & EU)

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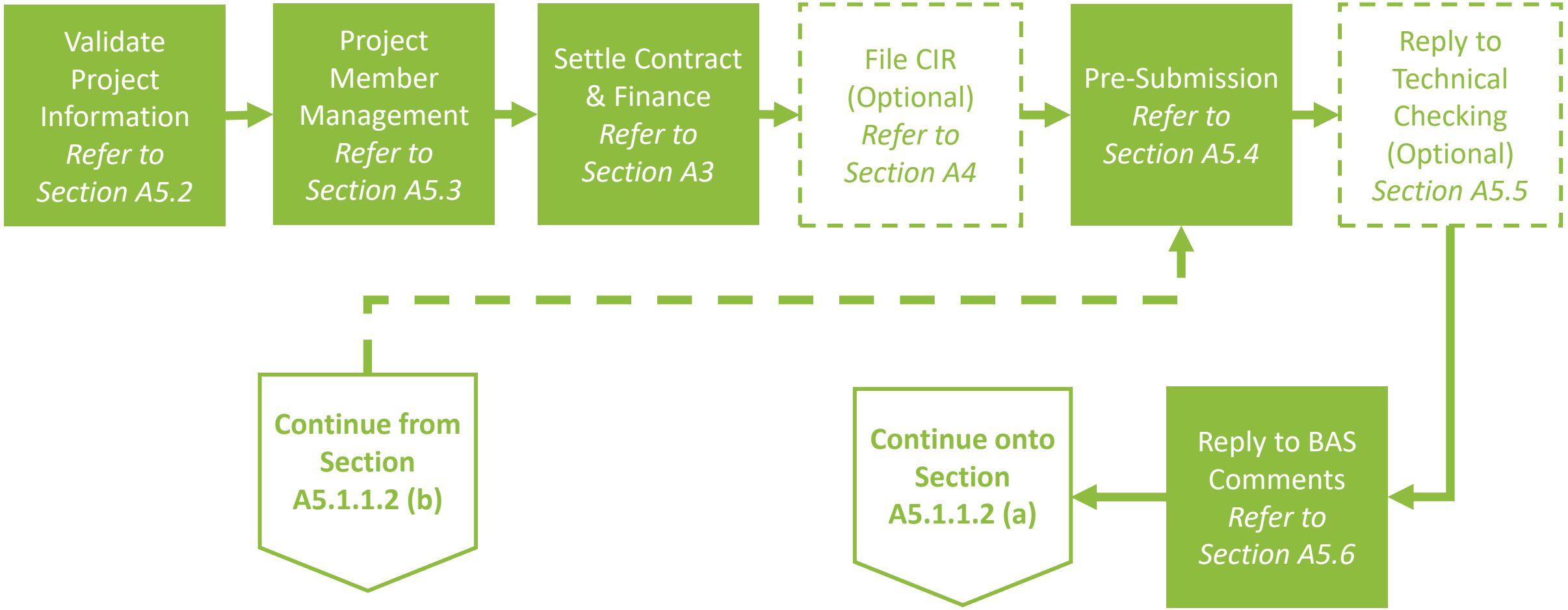
A5.1.1a Process Flow Overview

BEAM Plus NB v.2.0

NB 2.0



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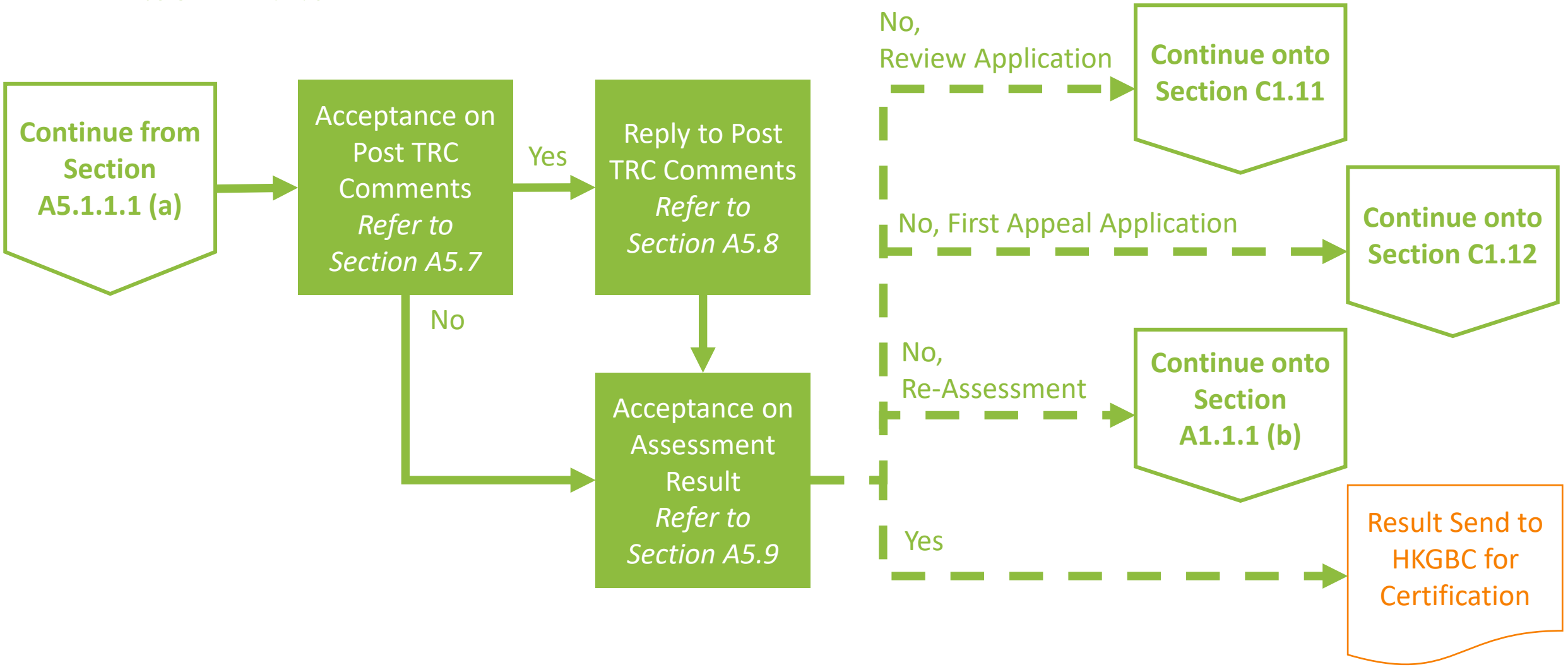
A5.1.1b Process Flow Overview

BEAM Plus NB v.2.0



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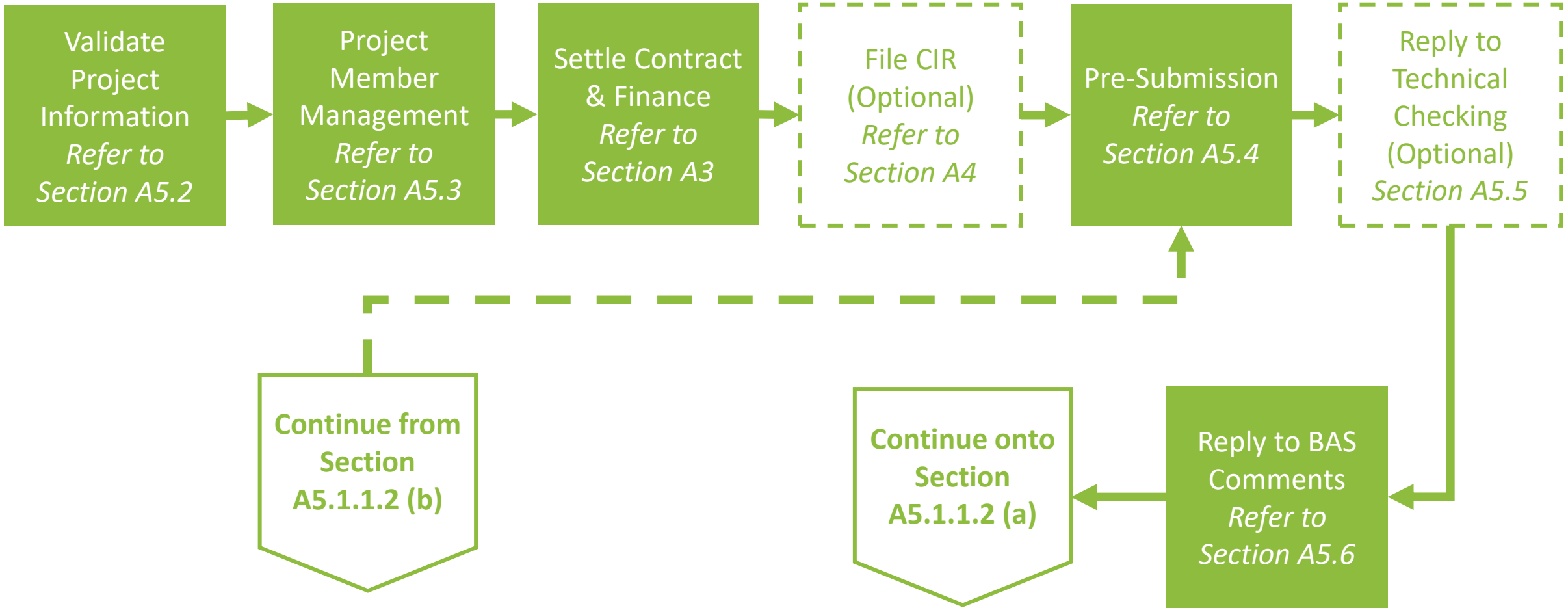
A5.1.2a Process Flow Overview

EBP 2.0

BEAM Plus EB v.2.0 Portfolio Assessment (MAN & EU)



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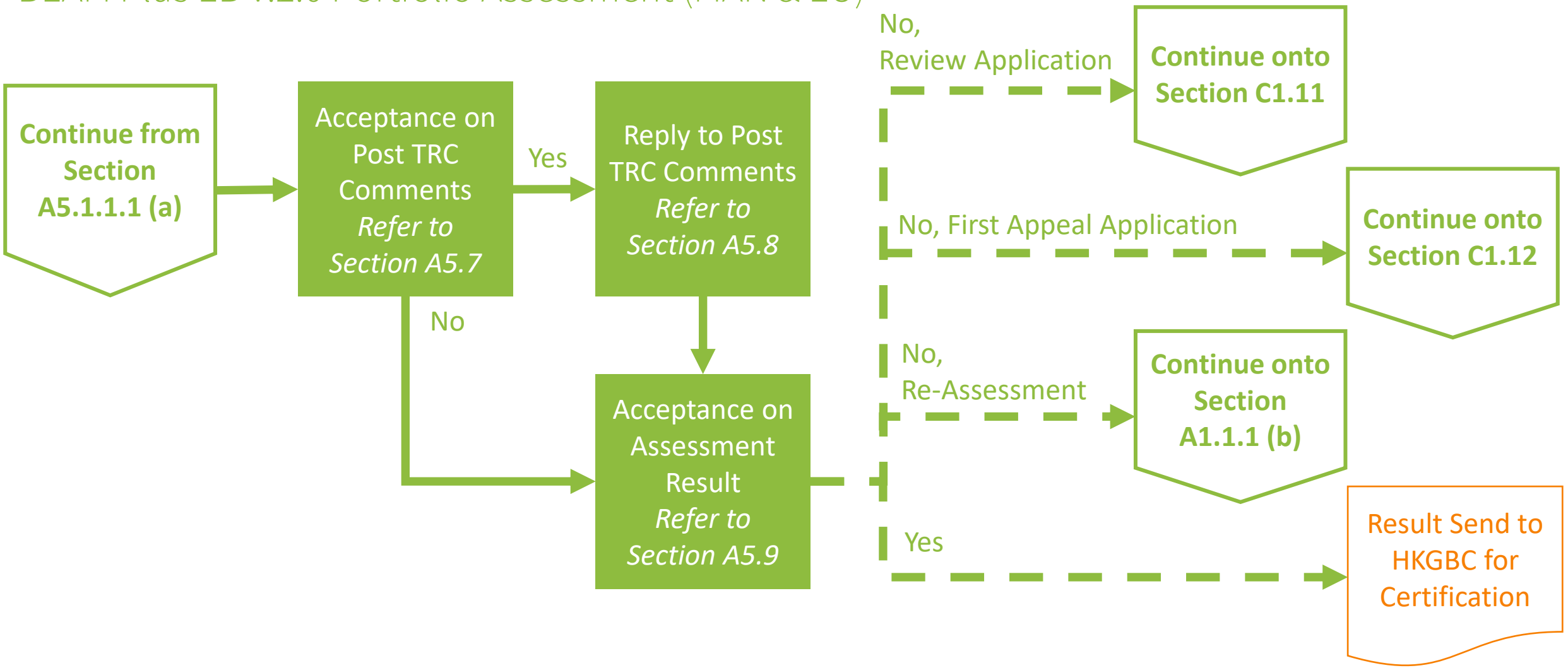
A5.1.2b Process Flow Overview

EBP 2.0

BEAM Plus EB v.2.0 Portfolio Assessment (MAN & EU)



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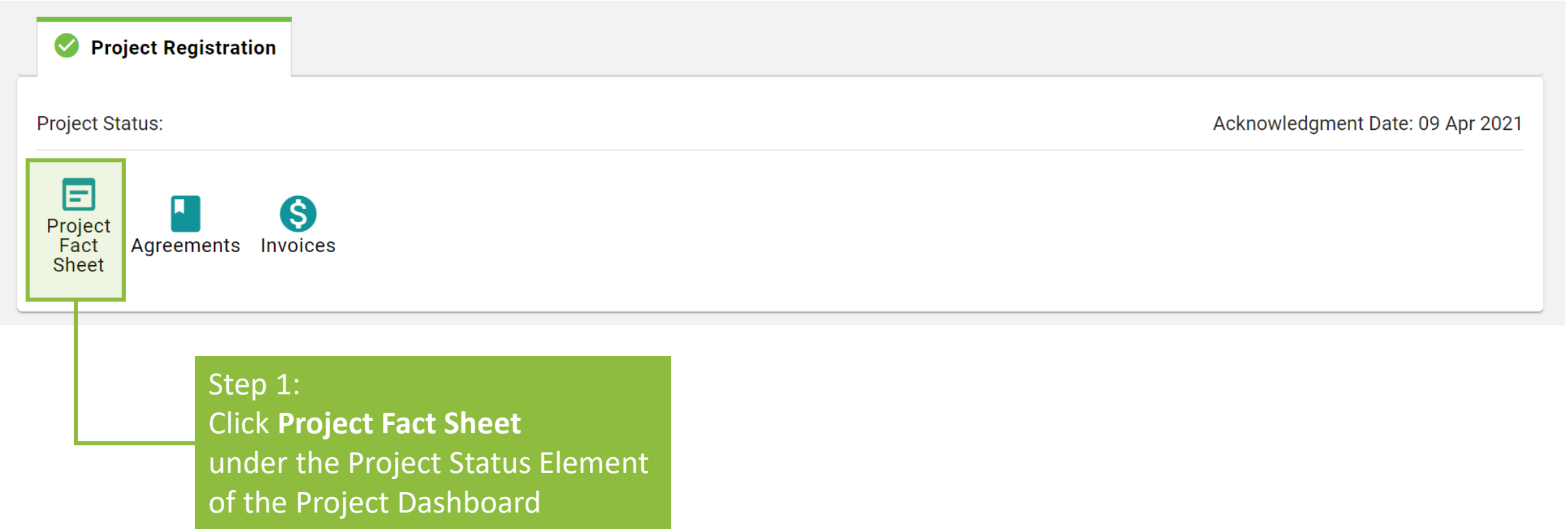
A5.2.1 Validate Project Information



Step 1:
Click **Project Fact Sheet**
under the Project Status Element
of the Project Dashboard

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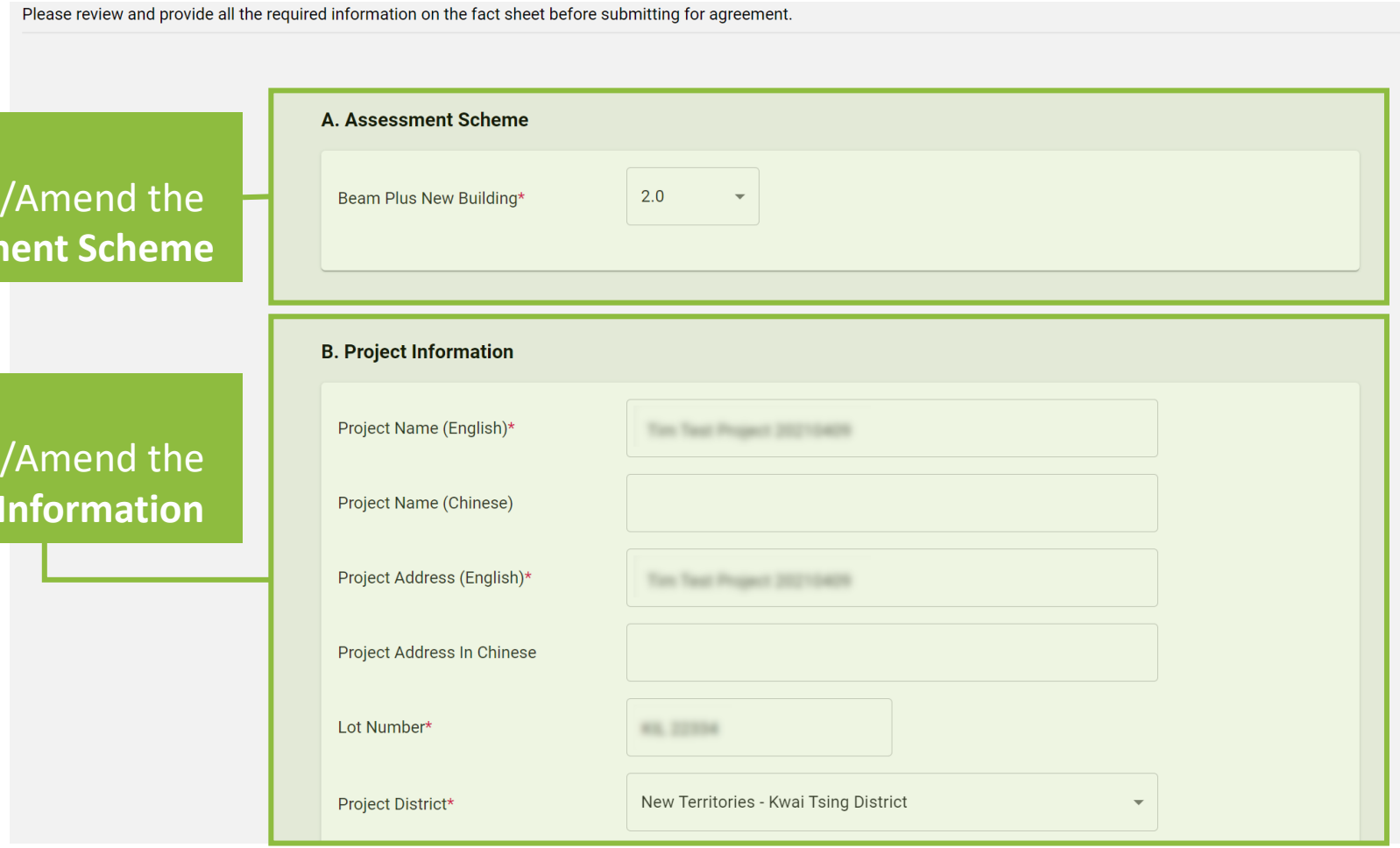
A5.2.2 Validate Project Information

Step 2:
Confirm/Amend the **Assessment Scheme**

Step 3:
Confirm/Amend the **Project Information**



Tips:

If the project was previously registered with HKGBC, data items under this project fact sheet should be identical to those specified during **HKGBC Project Registration**. If there are certain data items that require immediate attention, please update this project fact sheet and contact HKGBC to ensure the updated data is synchronised across all platforms.

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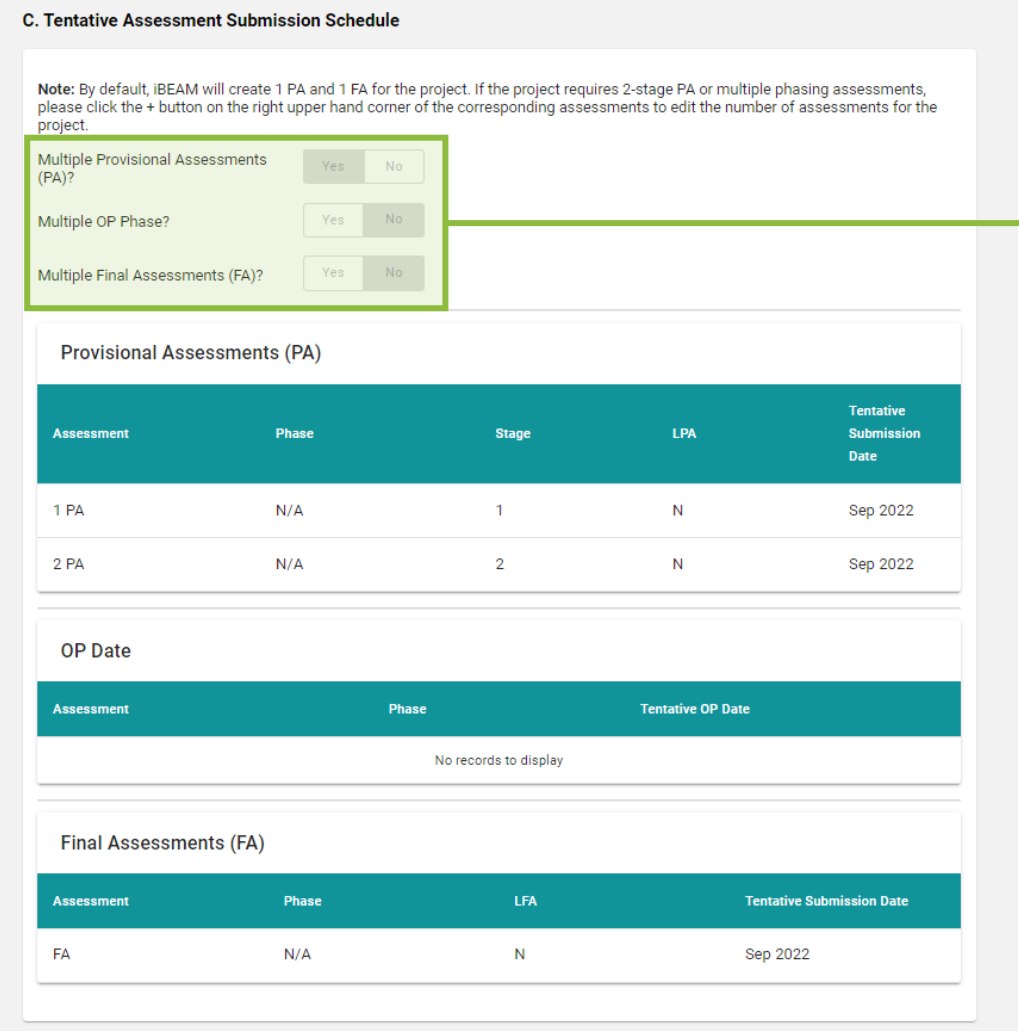
A5.2.3 Validate Project Information



Step 4:
Indicate whether the project has **Multiple Provisional Assessment**, **OP Phasing** or **Final Assessment**

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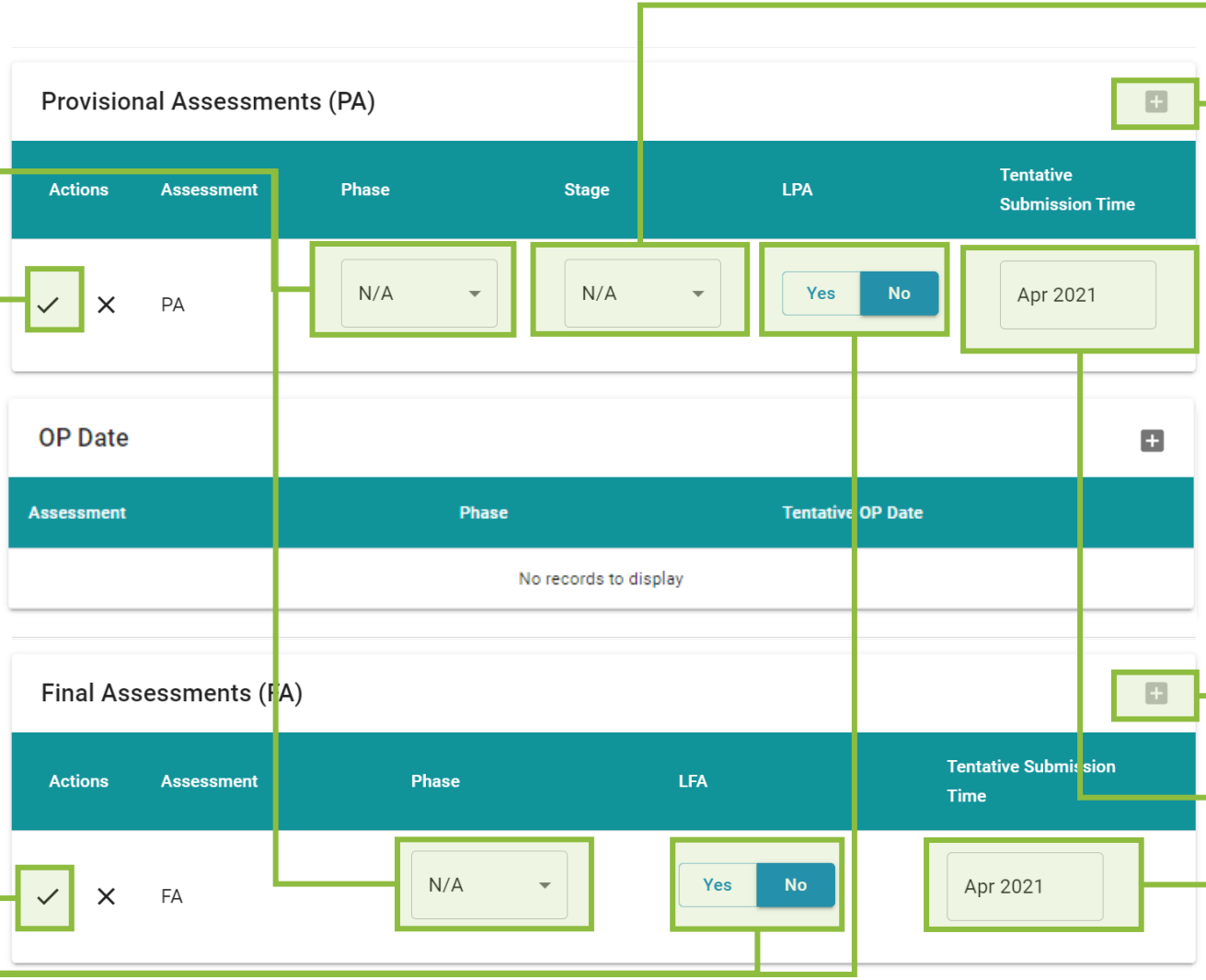
A5.2.4 Validate Project Information

Step 6: Indicate the **Phasing** of the assessment (***N/A*** *if the project has ONLY a Single Phase*)

Step 10: Click ✓ to confirm the additional of assessment

Step 9 (*Applicable to multi-phasing assessment*): Select whether the assessment is the Last PA (LPA) or Last FA (LFA)



Step 7 (*Applicable to PA*): Indicate the **Stage** of the assessment (***N/A*** *for Single Stage Assessment,* ***1*** *for 1st Stage of 2-Stage Assessment,* ***2*** *for 2nd Stage of 2-Stage Assessment)*

Step 5: Click **+** to add an assessment

Step 8: Indicate the **Tentative Submission Time**

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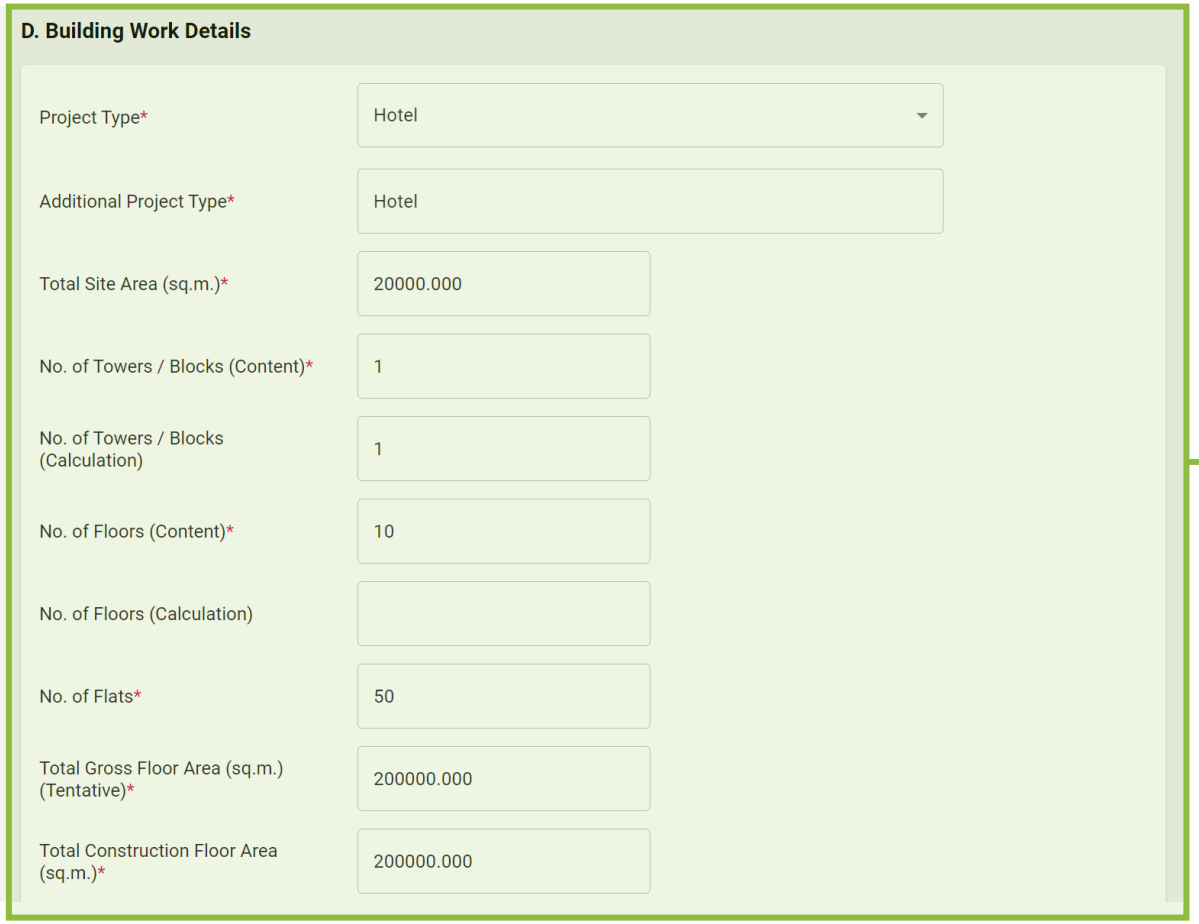
A5.2.5 Validating Project Information



Step 11:
Confirm/Amend the **Building Work Details**

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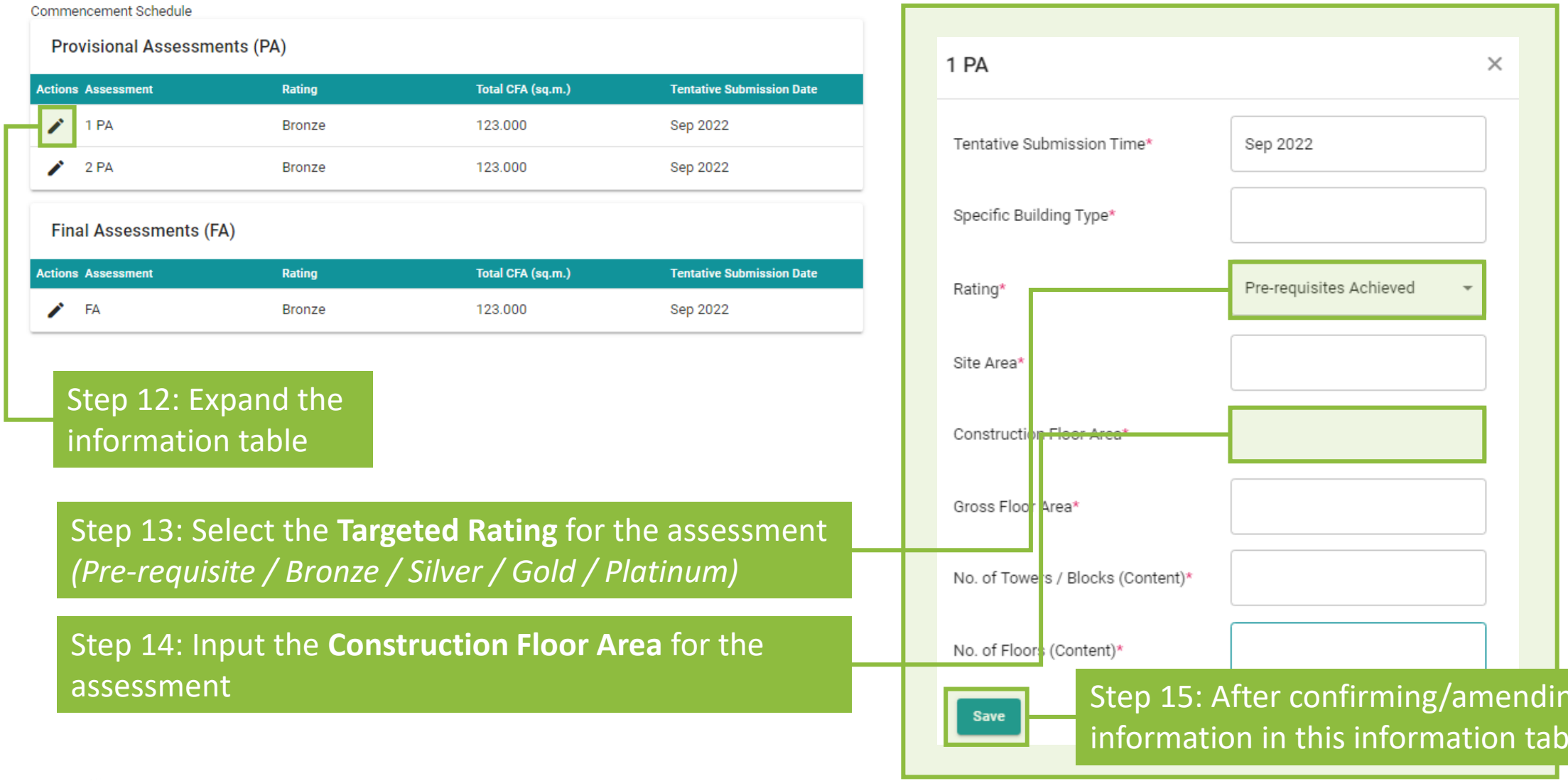
A5.2.6 Validate Project Information



Step 12: Expand the information table

Step 13: Select the **Targeted Rating** for the assessment *(Pre-requisite / Bronze / Silver / Gold / Platinum)*

Step 14: Input the **Construction Floor Area** for the assessment

Step 15: After confirming/amending all information in this information table, click **Save**

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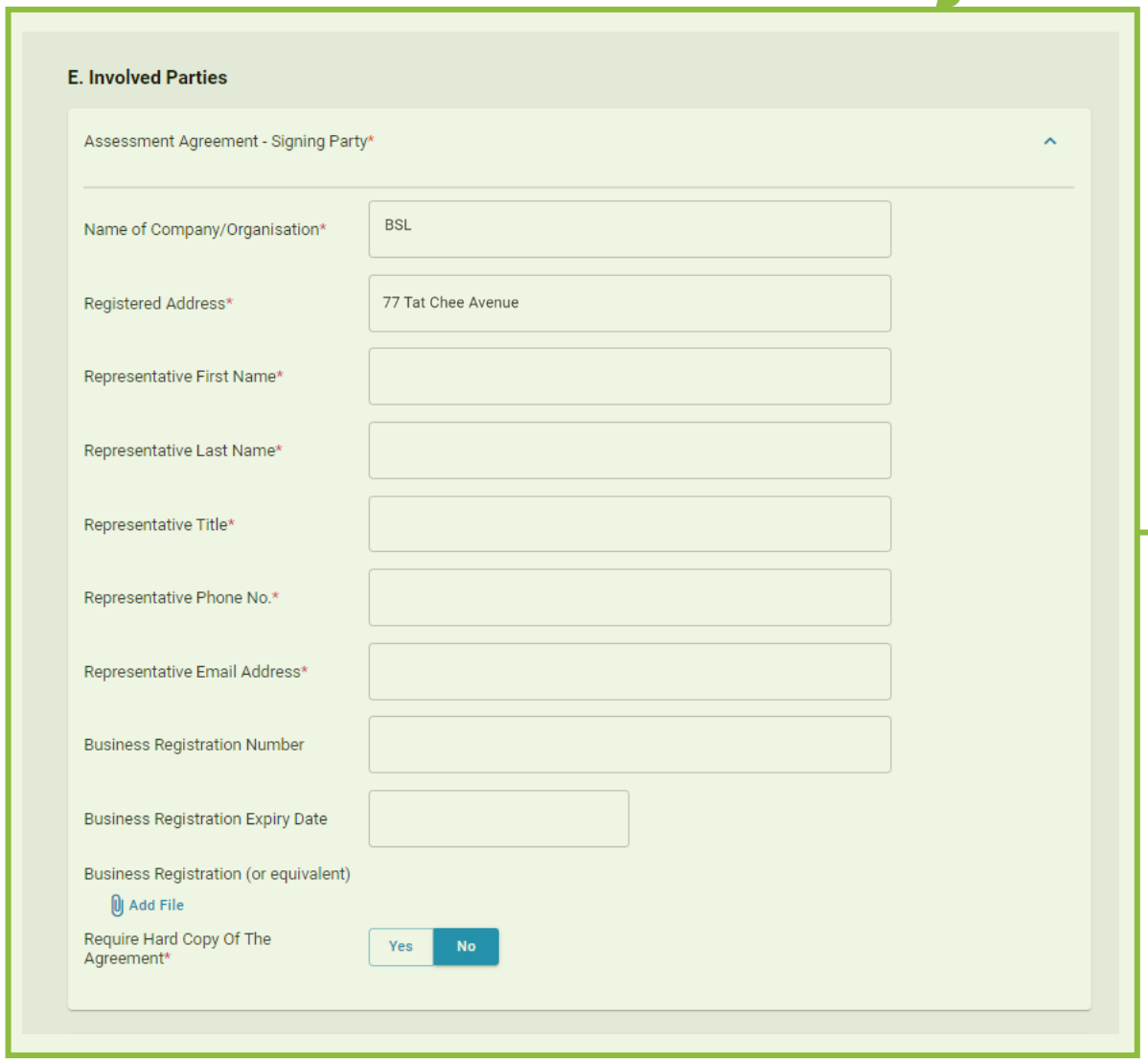
A5.2.7 Validate Project Information



Step 16: Confirm/amend the involved parties for the assessment

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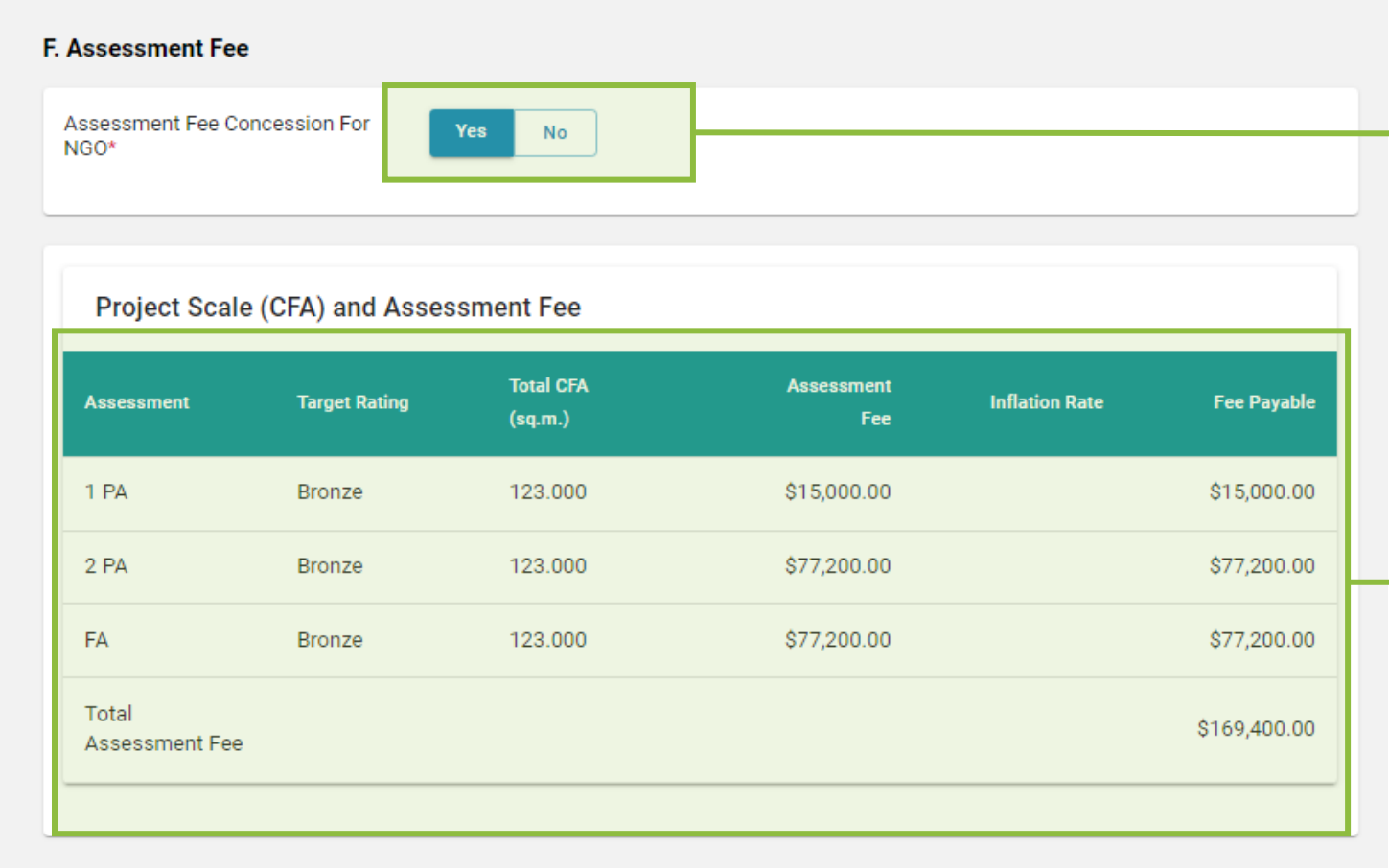
A5.2.8 Validate Project Information



Step 17: Select the **Assessment Fee Concession for NGO** for the assessment

Step 18: Validate the preliminary **Assessment Fee**

Tips:

The assessment fee stated in this page are estimated based on the information input into the project fact sheet. The actual assessment fee for the project will be stated in the invoices issued by BSL.

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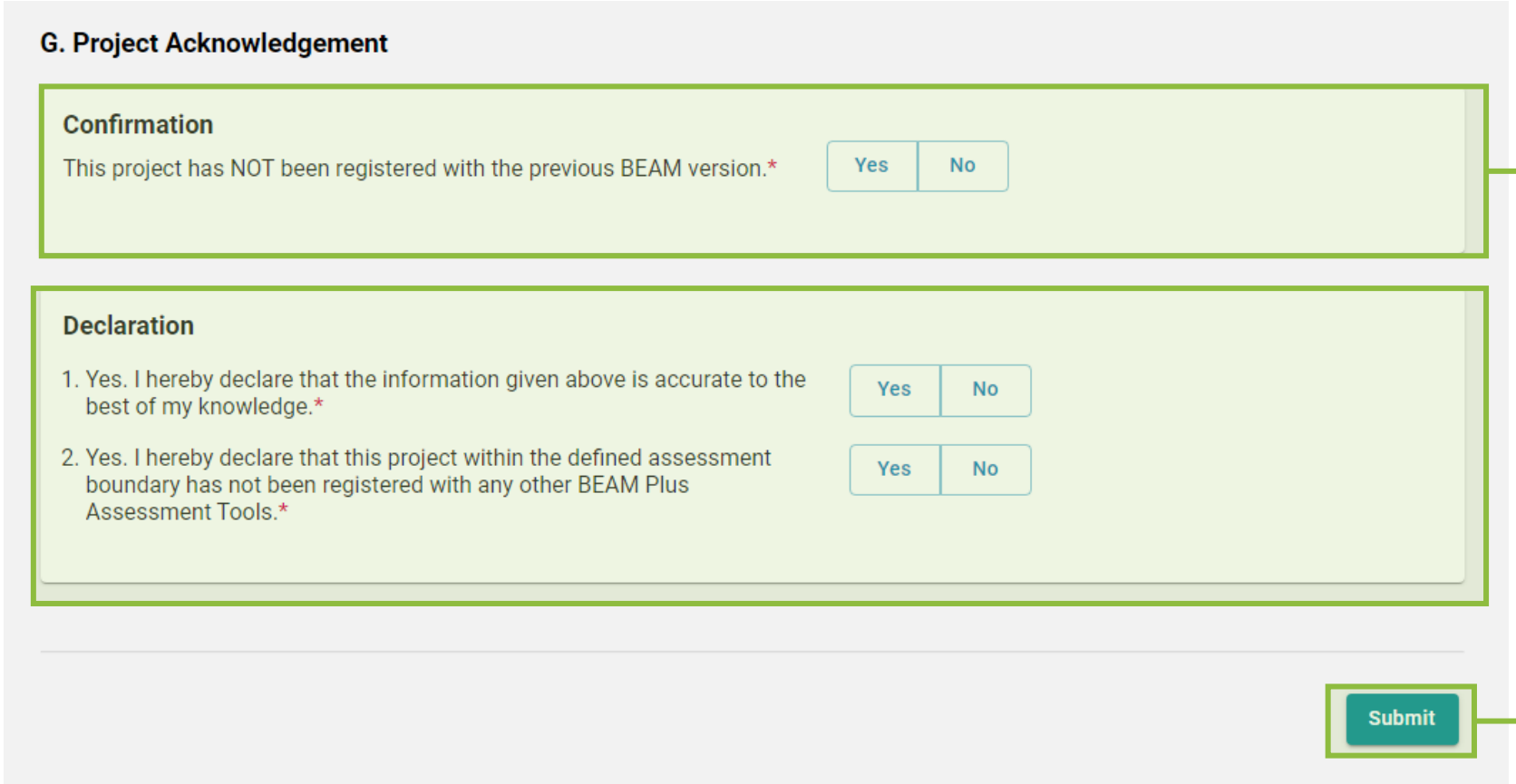
A5.2.9 Validate Project Information



Step 19: Confirm all conditions to the **Project Acknowledgement**

Step 20: Click **Submit** to complete validating the information on the Project Fact Sheet

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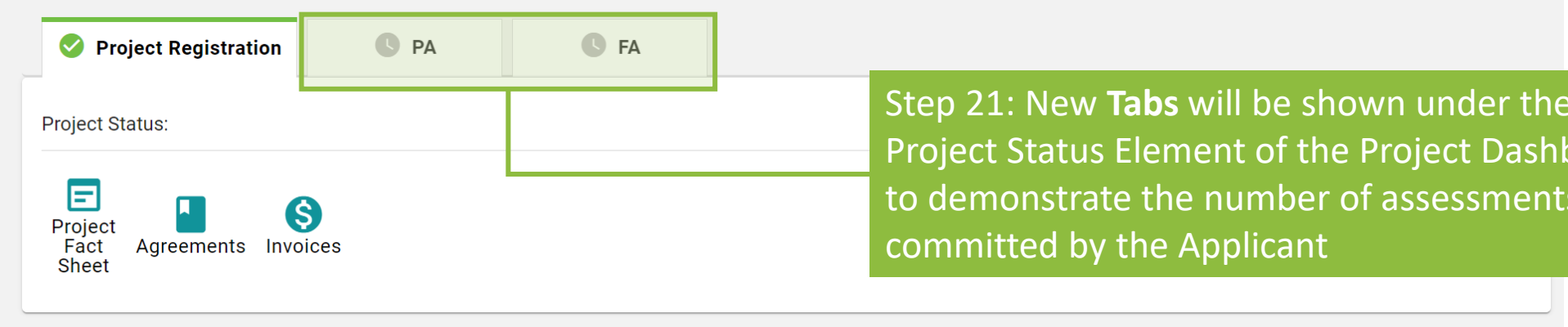
A5.2.10 Validate Project Information



Step 21: New **Tabs** will be shown under the Project Status Element of the Project Dashboard to demonstrate the number of assessments committed by the Applicant

Tips:

1. For better identifications, the following naming scheme will be displayed on the tab.
   a. Normal PA: **PA** | b. Normal FA: **FA** | c. **Multiple Phase PA**: **#P PA**, so if the assessment is the 1st Phase of a multiple PA, tab will display 1P PA | d. **Two-Stage PA**: **#S PA**, so if the assessment is the 1st Stage PA, tab will display 1S PA | e. **Two-Stage PA of a Multiple PA**: **#S #P PA**, so if the assessment is the 1st Stage of the 1st Phase of a Multiple PA , tab will display 1S 1P PA | f. **Multiple Phase FA: #P FA**, so if the assessment is the 1st Phase of a multiple FA, tab will display 1P FA
2. Upon validating the project information, the project fact sheet will be **LOCKED** for the processing of assessment agreement and invoice.

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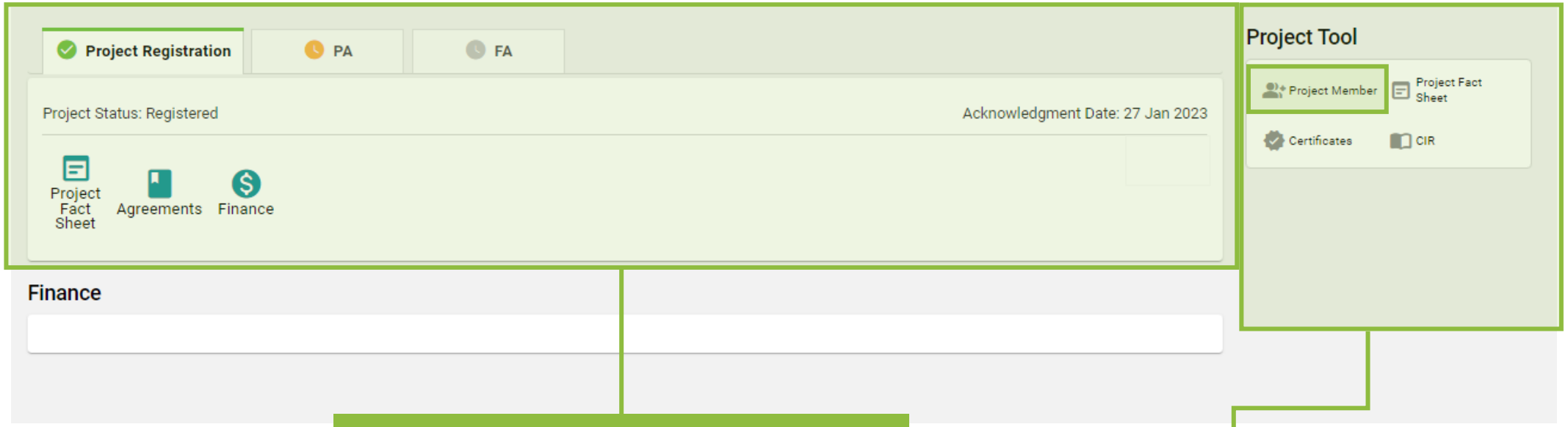
A5.3.1 Project Member Management



Step 1: Access the **Project Dashboard**

Step 2: Click **Project Member** in the Function Element

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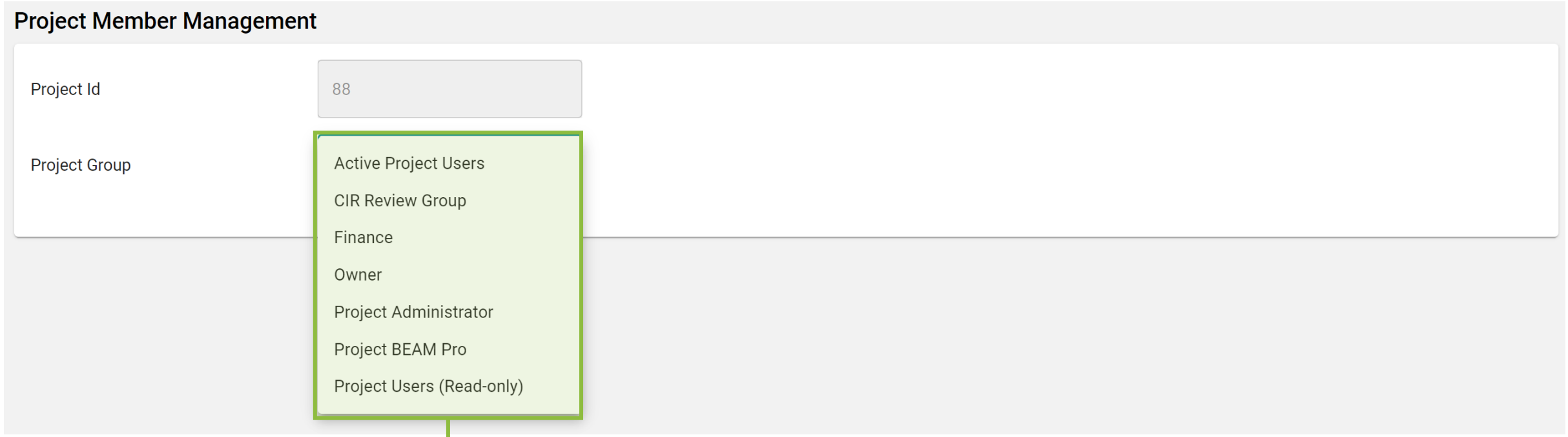
A5.3.2 Project Member Management



Step 3: Select the **Project Group**

*Please refer to **Appendix D** for the authority of each project group*

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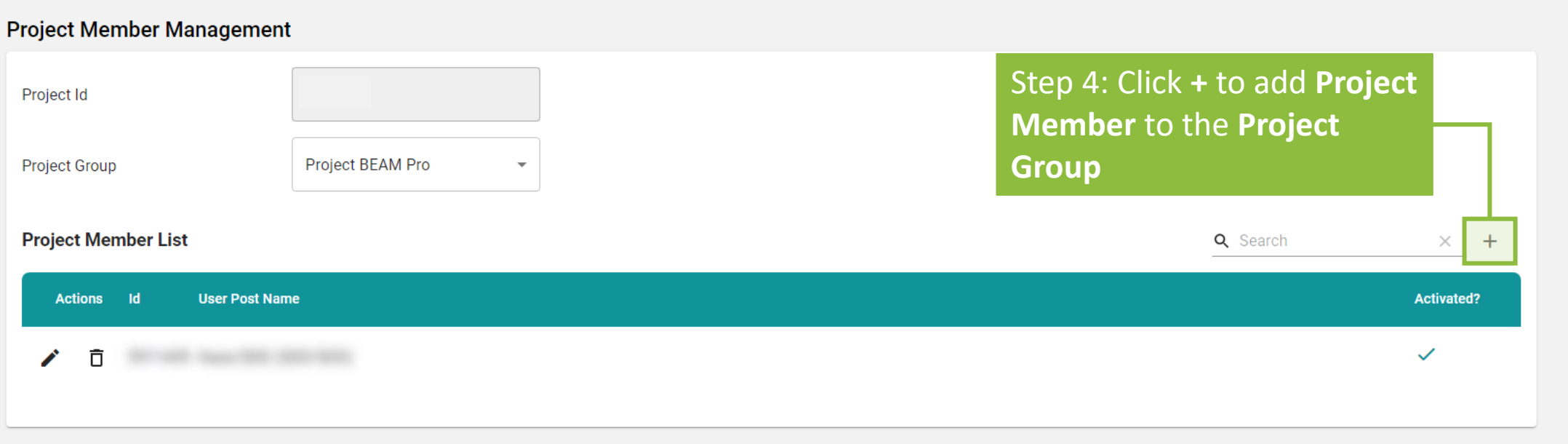
A5.3.3 Project Member Management

(a) **Add** user(s) to Project Member



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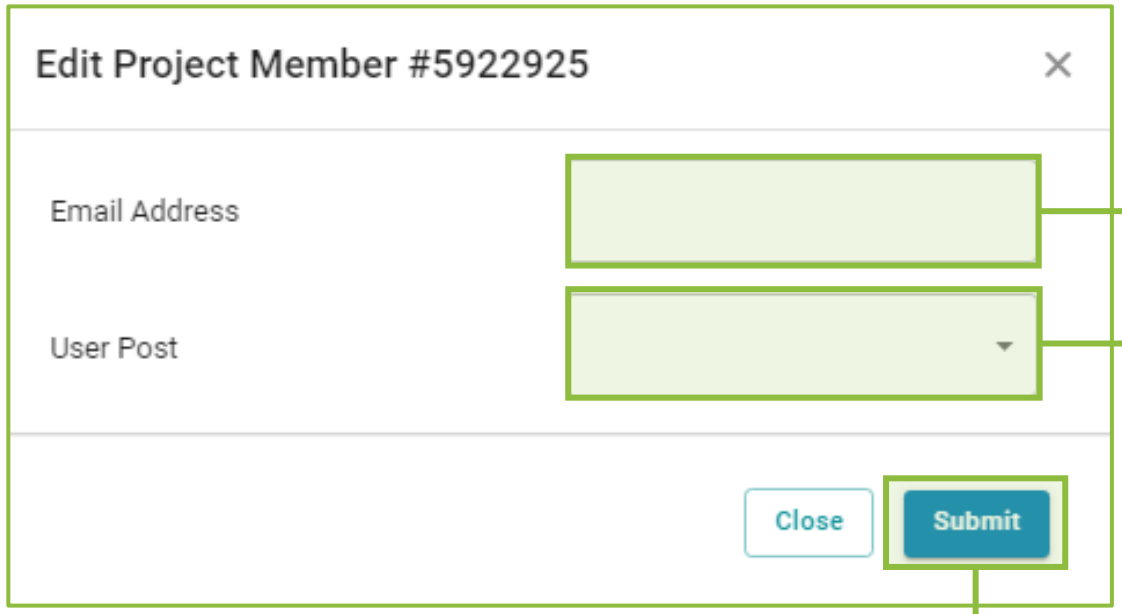
A5.3.4 Project Member Management

(a) **Add** user(s) to Project Member



Step 5a: Indicate the **User Post Email Address**

Step 5b: Indicate the **User Post Name**

Step 6: Click **Submit** to complete editing the Project Member

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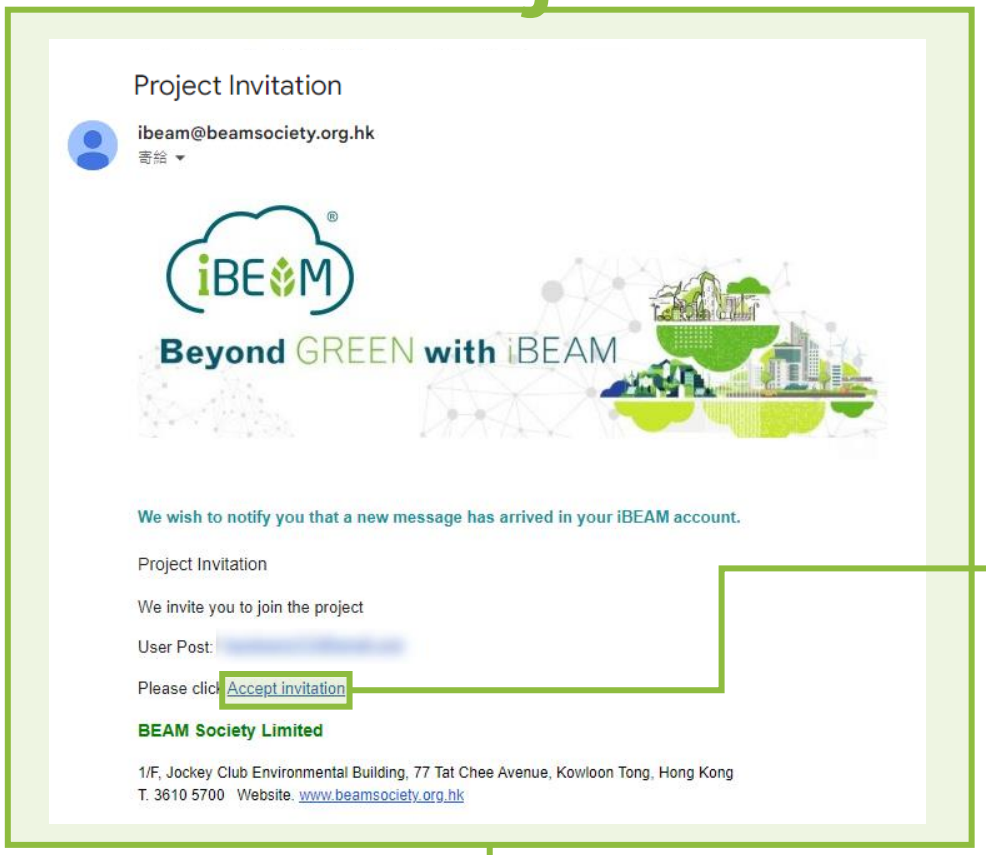
A5.3.5 Project Member Management

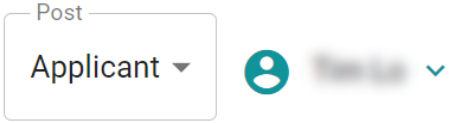


Step 7: A project invitation notification will be sent to the e-mail stated in *Step 5a*

Step 8: Click **Accept Invitation** in the notification

Tips:

1. The project invitation notification may be filtered out by email spam filter. Please check the **junk folder** if the project invitation notification does not appear in the inbox. Additionally, please ensure that **ibeam@beamsociety.org.hk** is added as a safe sender in the email setting.
2. If your account has multiple post. Please ensure that you select the **same post** as indicated in the project invitation notification before clicking the **Accept Invitation** button. The post can be selected on the right-hand side of the **Navigation Bar**.



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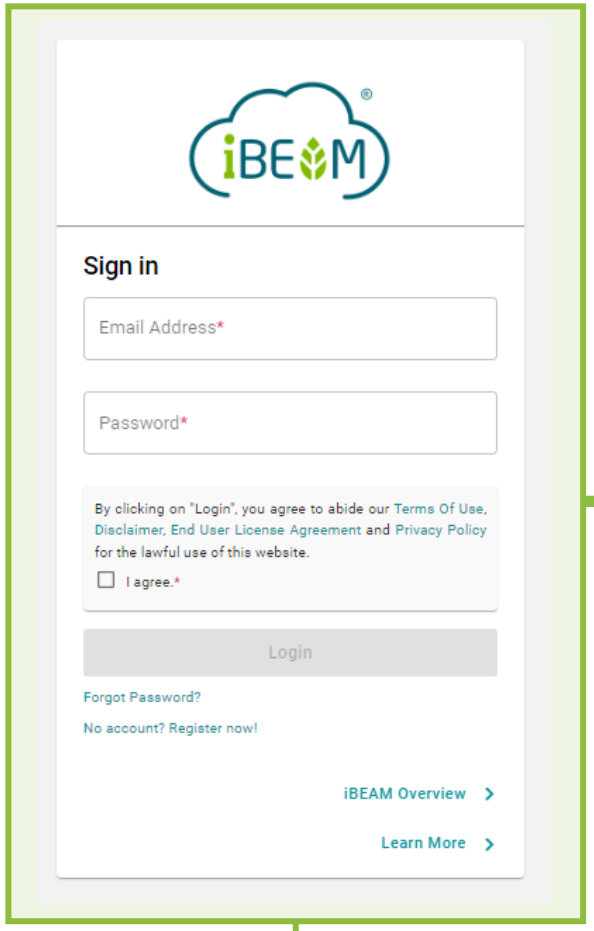
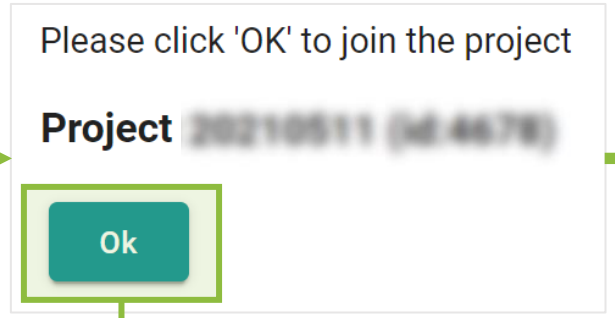
A5.3.6 Project Member Management



Step 9: The browser will be directed to the iBEAM login page. **Login** to iBEAM with the e-mail stated in *Step 5a*



Step 10: Click **OK** to confirm joining the project

Step 11: Click **OK** to acknowledge joining the project

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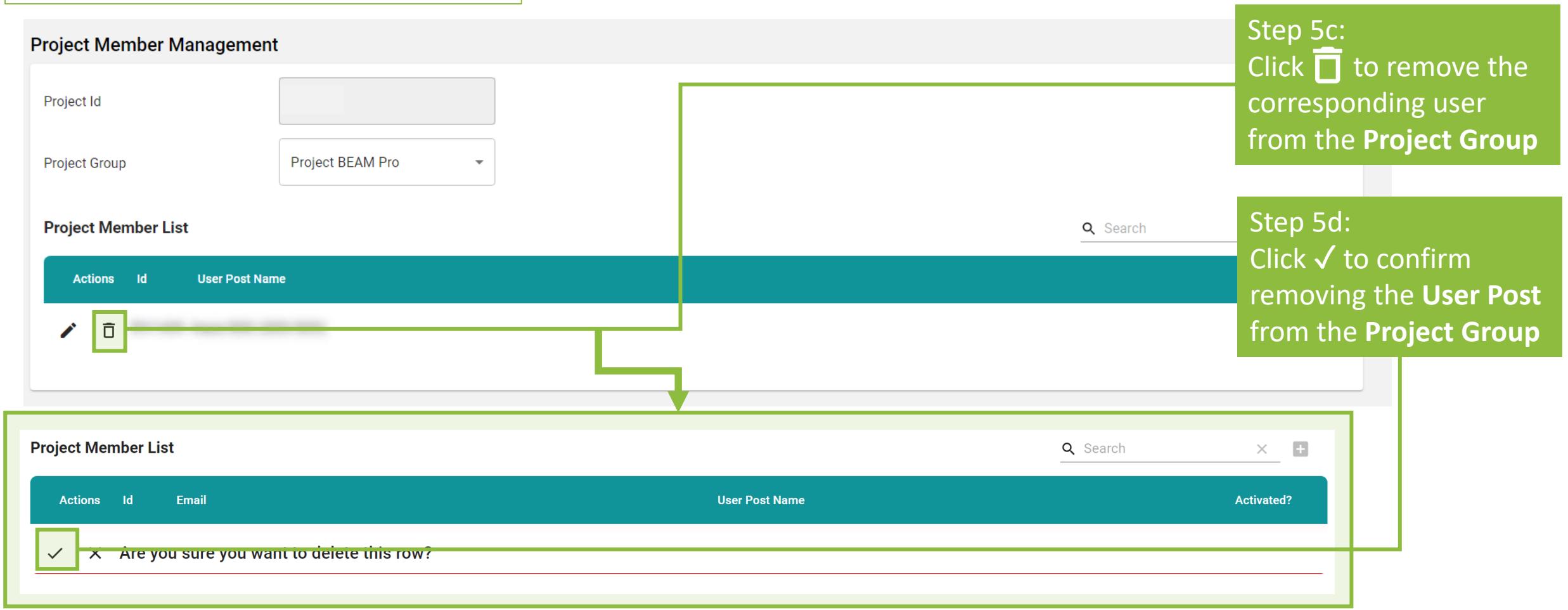
A5.3.7 Project Member Management

(b) **Remove** user(s) from Project Group



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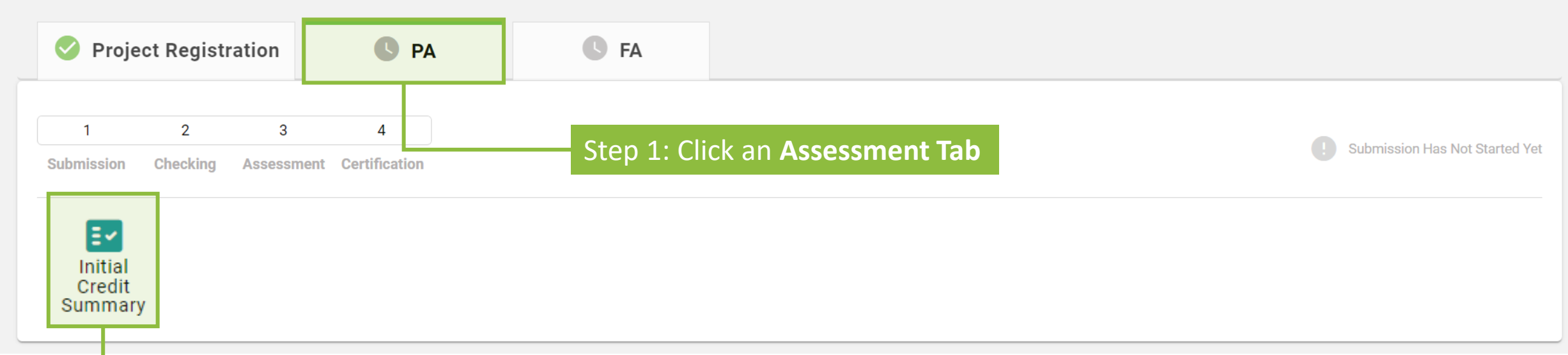
A5.4.1 Pre-Submission

ALL



Step 1: Click an **Assessment Tab**

Step 2: Click **Initial Credit Summary** to create a new Credit Summary for the assessment

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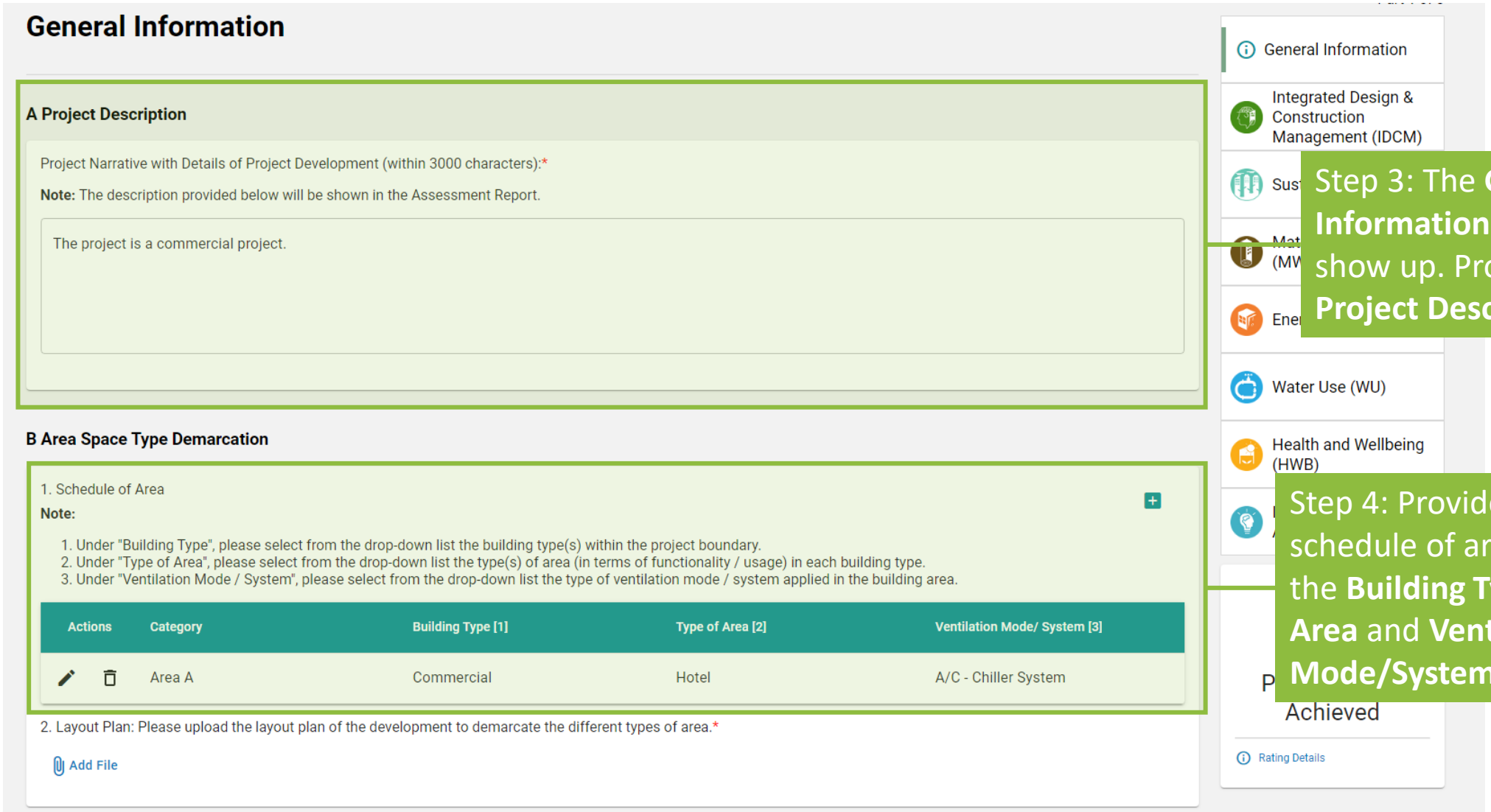
A5.4.2 Pre-Submission



Step 3: The **General Information** page will show up. Provide the **Project Description**

Step 4: Provide the schedule of area, including the **Building Type**, **Type of Area** and **Ventilation Mode/System**

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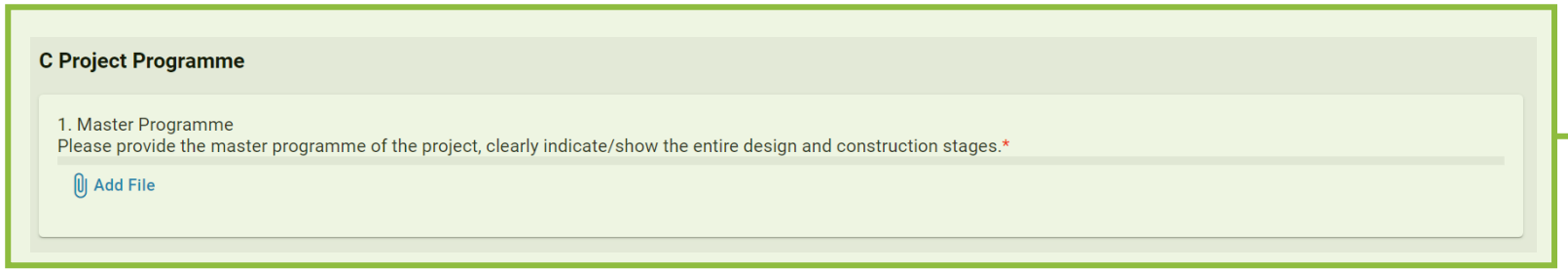
A5.4.3 Pre-Submission



Step 5: Upload the **Project Programme**

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A5.4.4 Pre-Submission

2. Key Milestones

Note:

1. Please ensure that the start date and end date to each of the key milestones is consistent with that indicated in the master programme.
2. All start date and end date of construction stage(s) yet to be commenced could be indicative for Provisional Assessment.
3. Relevant statutory body under this section shall mean Buildings Department and in the case of public housing developed by Housing Authority, Independent Checking Unit (ICU).
4. The assessment will consider record-related submission materials up till 3 months before the first submission made for Provisional Assessment.
5. For IDCM 7 and IDCM 10, partial credit shall be awarded for individual construction stage (i.e. demolition, foundation and superstructure in a default ratio). The partial credit attainable for each construction stage will be automatically calculated based on the applicability of demolition and foundation stages to the project and will be shown at the end of this section.

2.1 Hoarding* Yes No

2.2 Demolition* Yes No

2.3 Foundation* Yes No

2.4 Superstructure

Superstructure Start Date*

Superstructure End Date*

2.5 Substantiation of Work Completion*

Certicate On Work Completion | Occupation Permit OP | Other

Target/ Date of Issuance*

2.4 Superstructure

Superstructure Start Date*

Superstructure End Date*

2.5 Substantiation of Work Completion*

Certicate On Work Completion | Occupation Permit OP | Other

Target/ Date of Issuance*

2.6 Assessment

Commencement Date*

IDCM

The Radio Calculated Based On The Duration Of Each Construction Stage Will Be Adpoted For This Project*

The Default Ratio Will Be Adopted For This Project | The Radio Calculated Based On The Duration Of Each Construction Stage Will Be Adpoted For This Project

Construction Stage	Ratio
Demolition	N/A
Foundation	N/A
Superstructure	1.00

Step 6: Provide the **Key Milestones**

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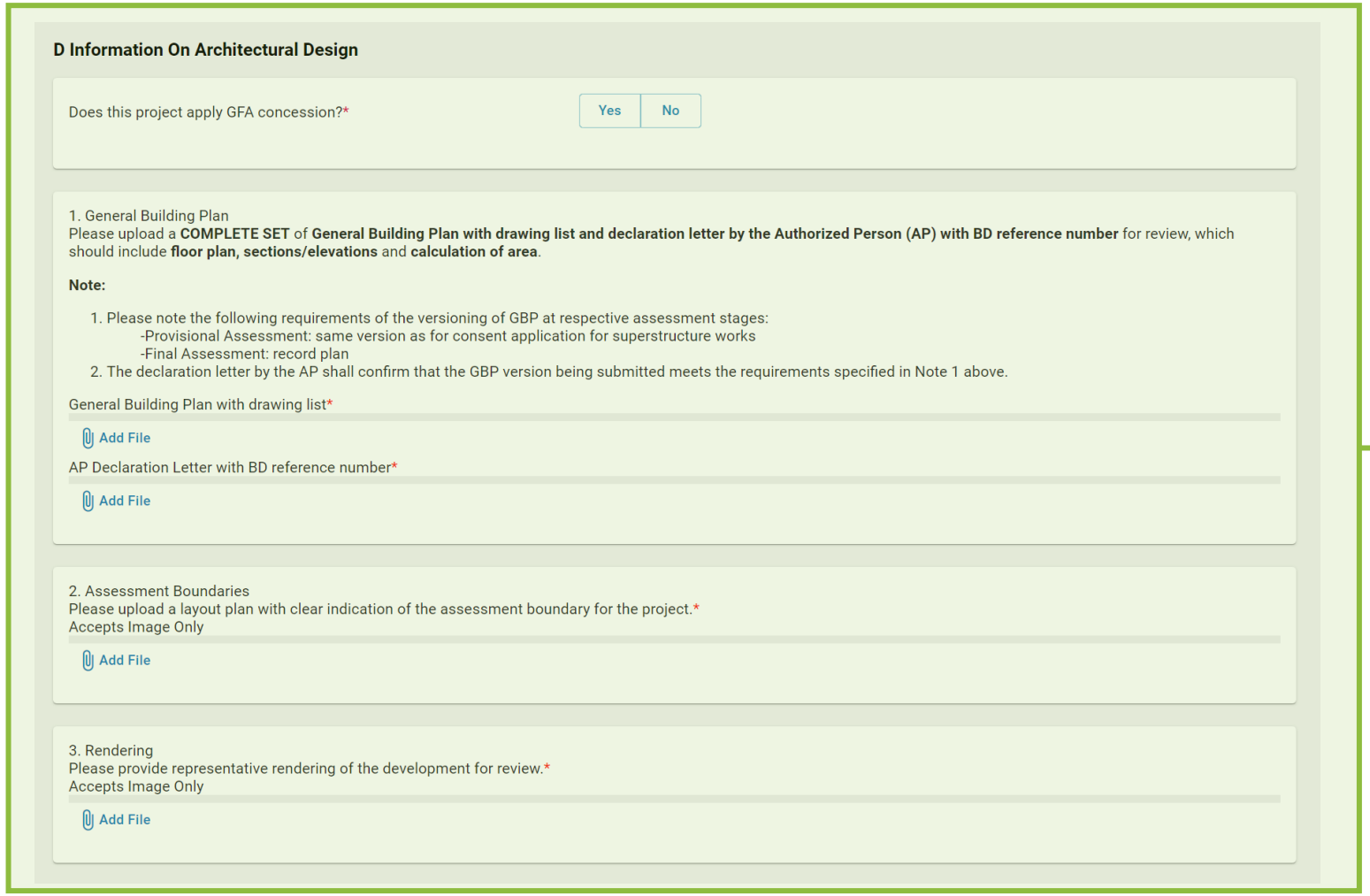
A5.4.5 Pre-Submission



D Information On Architectural Design

Does this project apply GFA concession?* Yes | No

1. General Building Plan
Please upload a **COMPLETE SET** of **General Building Plan with drawing list and declaration letter by the Authorized Person (AP) with BD reference number** for review, which should include **floor plan, sections/elevations** and **calculation of area**.

Note:

1. Please note the following requirements of the versioning of GBP at respective assessment stages:
   -Provisional Assessment: same version as for consent application for superstructure works
   -Final Assessment: record plan
2. The declaration letter by the AP shall confirm that the GBP version being submitted meets the requirements specified in Note 1 above.

General Building Plan with drawing list*
Add File

AP Declaration Letter with BD reference number*
Add File

2. Assessment Boundaries
Please upload a layout plan with clear indication of the assessment boundary for the project.*
Accepts Image Only
Add File

3. Rendering
Please provide representative rendering of the development for review.*
Accepts Image Only
Add File

Step 7: Upload the information on **Architectural Design**, *including the General Building Plan, Declaration Letter, Layout Plan and Rendering*

Tips:

Information reflecting the as-built design should be provided if the submission is a Final Assessment.

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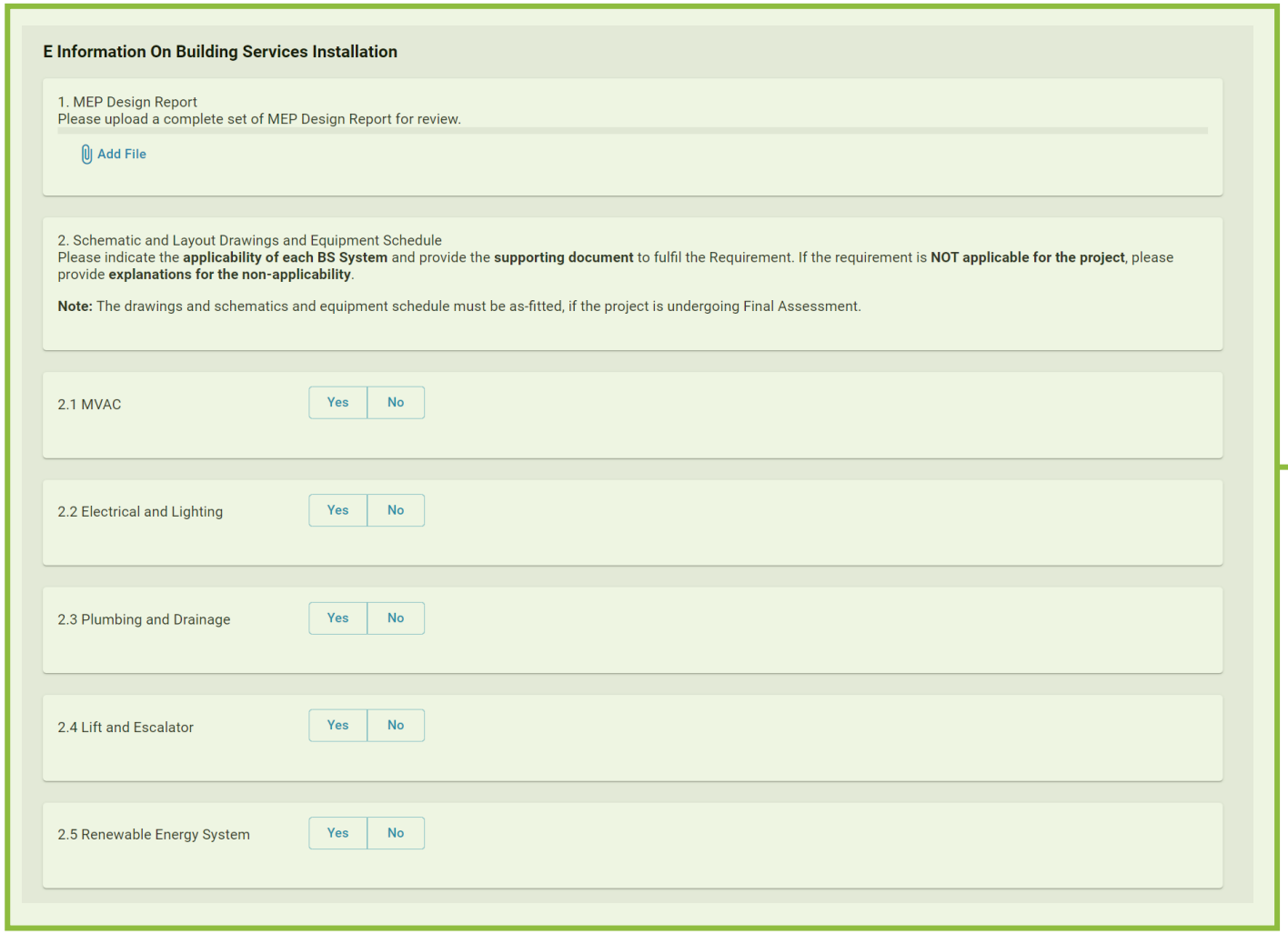
A5.4.6 Pre-Submission



E Information On Building Services Installation

1. MEP Design Report
Please upload a complete set of MEP Design Report for review.

Add File

2. Schematic and Layout Drawings and Equipment Schedule
Please indicate the **applicability of each BS System** and provide the **supporting document** to fulfil the Requirement. If the requirement is **NOT applicable for the project**, please provide **explanations for the non-applicability**.

Note: The drawings and schematics and equipment schedule must be as-fitted, if the project is undergoing Final Assessment.

2.1 MVAC	Yes	No
2.2 Electrical and Lighting	Yes	No
2.3 Plumbing and Drainage	Yes	No
2.4 Lift and Escalator	Yes	No
2.5 Renewable Energy System	Yes	No

Step 8: Upload the information on **Building Services Installation**, *including the Equipment Schedule, MEP Design Report and Schematic Drawings and Layout*

Tips:

Information reflecting the as-built design should be provided if the submission is a Final Assessment.

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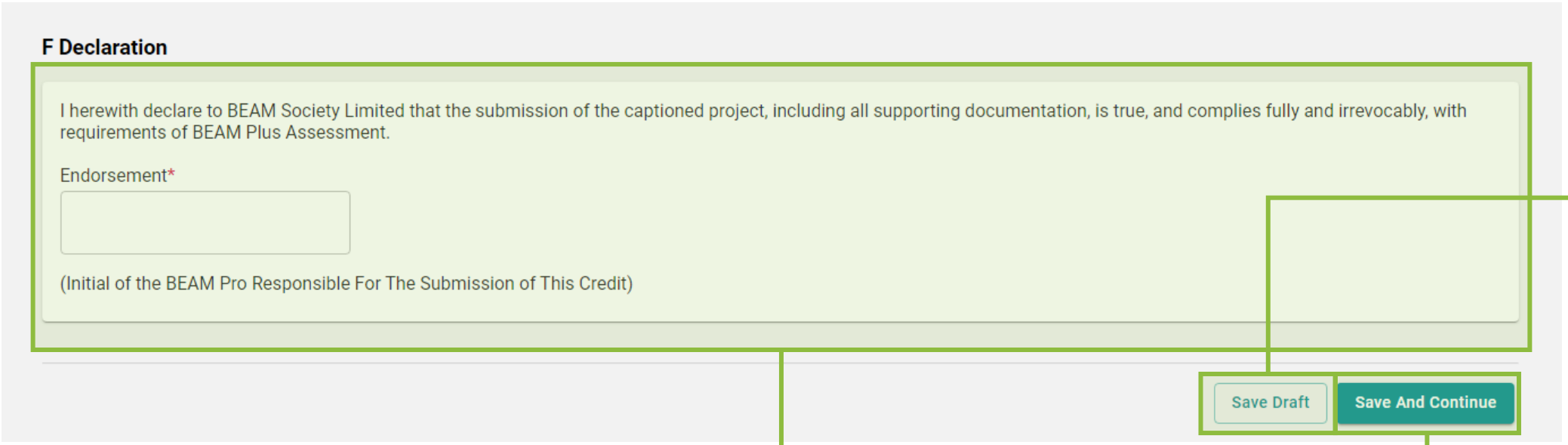
A5.4.7 Pre-Submission



Step 10a (Optional): Click **Save** to save the information input into this General Information page

Step 9: Type in the **Initial of the BEAM Pro** to declare that the information given in this application is true and correct to the best of my knowledge

Step 10b: Click **Save and Continue** to proceed entering information in individual Aspect

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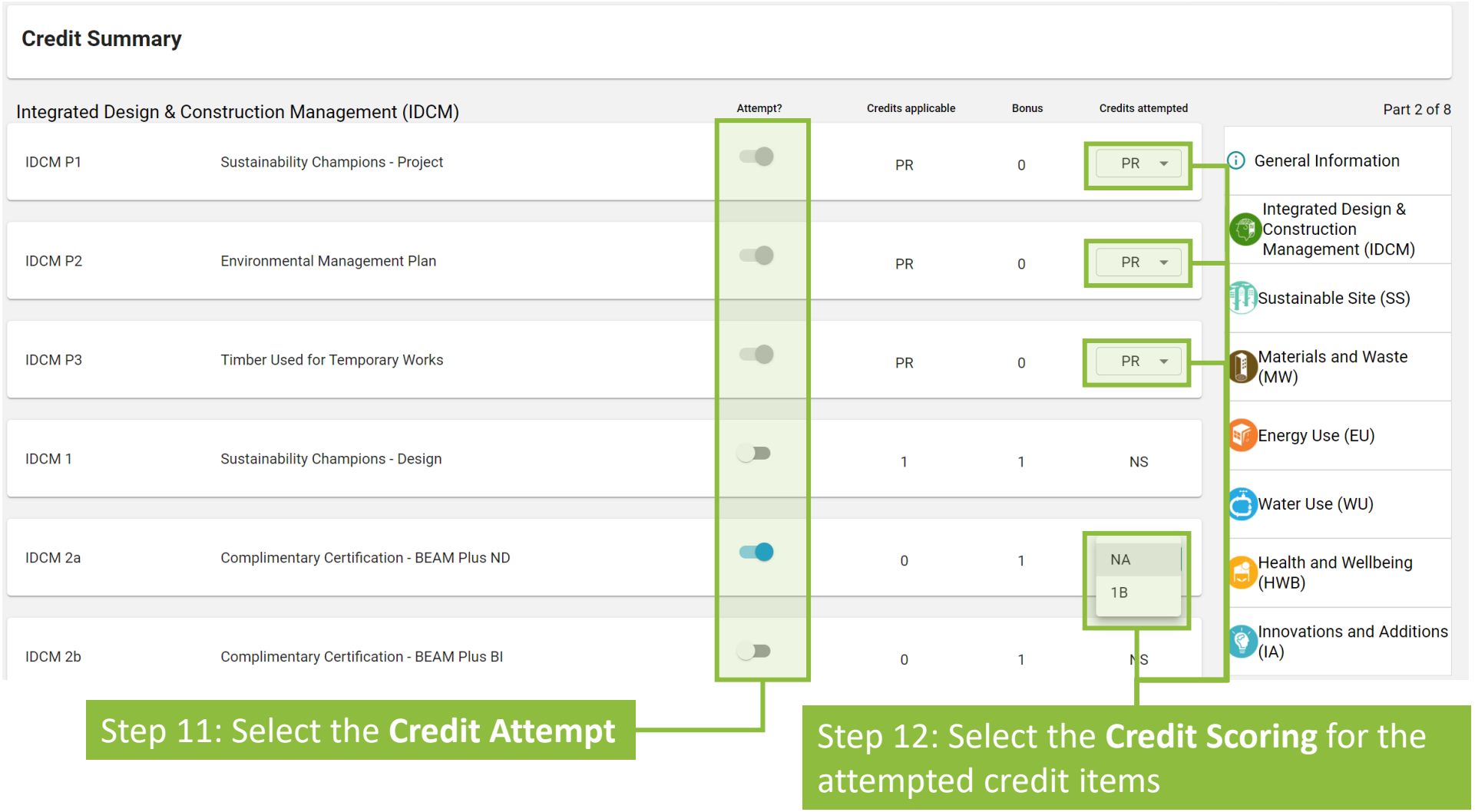
A5.4.8 Pre-Submission



Step 11: Select the **Credit Attempt**

Step 12: Select the **Credit Scoring** for the attempted credit items

Tips:

1. Credits attempting as **NA** shall be regarded as **attempted credits**. The Applicant is obliged to **complete the e-Form** to demonstrate the compliance to the credit.
2. The **pre-requisite** must be **attempted** based on the assessment requirement. There are **no options** to **disable** the attempt of the pre-requisite.

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A5.4.9 Pre-Submission

ALL

IDCM 16b	BIM Integration - Design and Construction Teams		0	1	NS
IDCM 16c	BIM Integration - Time		0	1	NS
IDCM 16d	BIM Integration - Facility Management		0	1	NS
IDCM 17	Design for Engagement and Education on Green Buildings		1	1	NS
		Total	25		0+0B

Save Continue

Tips:

iBEAM will direct back to the **Credit Summary Dashboard** when the **Continue** is clicked on the Innovation and Additions (IA) page.

Step 13b: Click **Continue** to proceed entering information in other Aspects

Step 13a (Optional):
Click **Save** to save the information on the current Aspect

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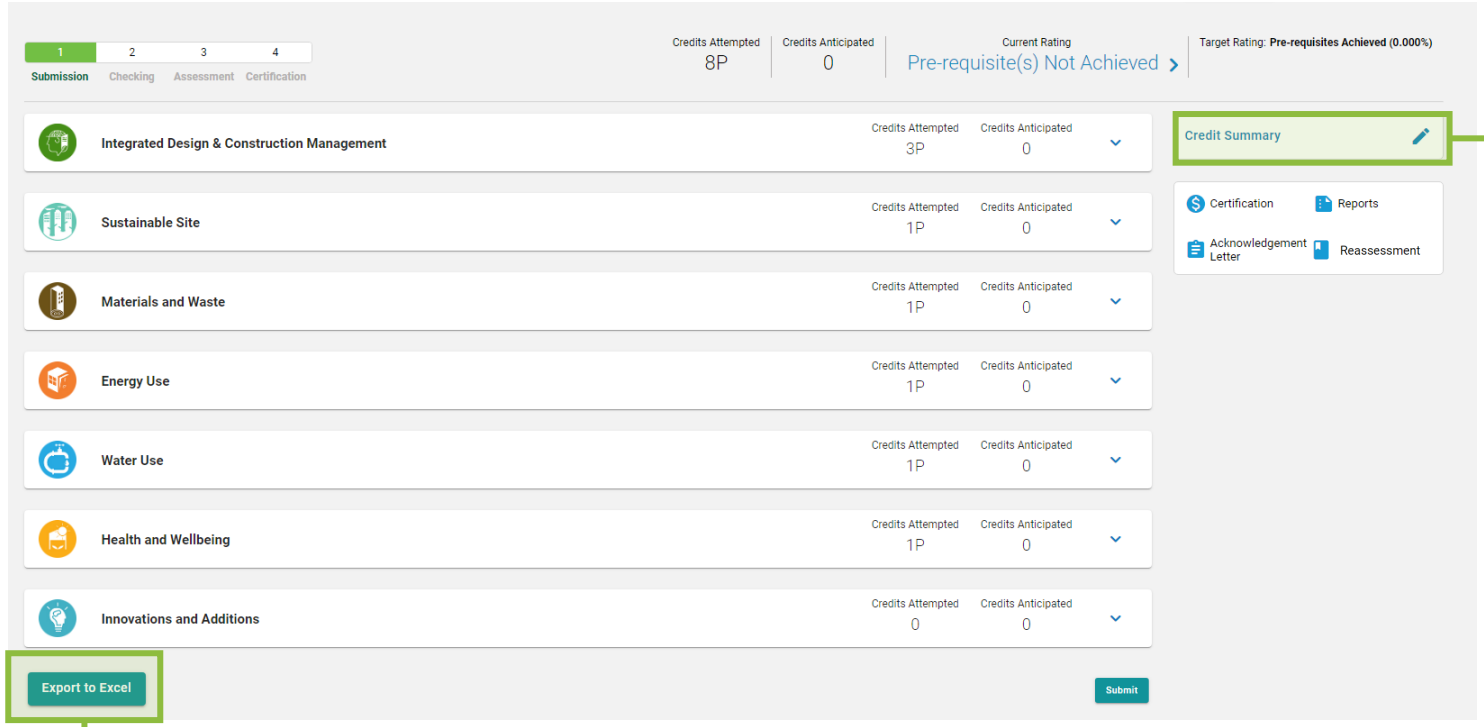
A5.4.10 Pre-Submission



Step 15 (Optional):
Click **Credit Summary**

Step 14 (Optional):
Click **Export to Excel** to generate the Credit Summary in excel format

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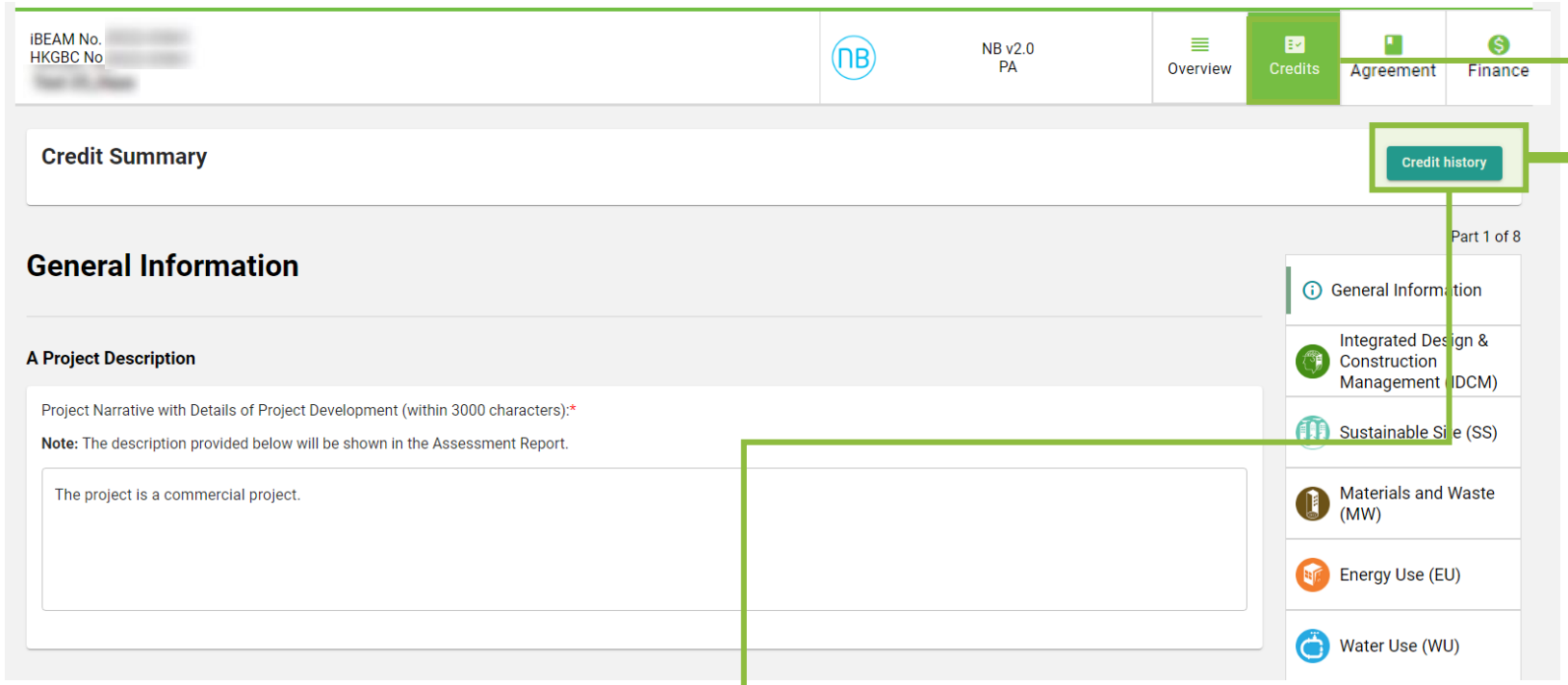
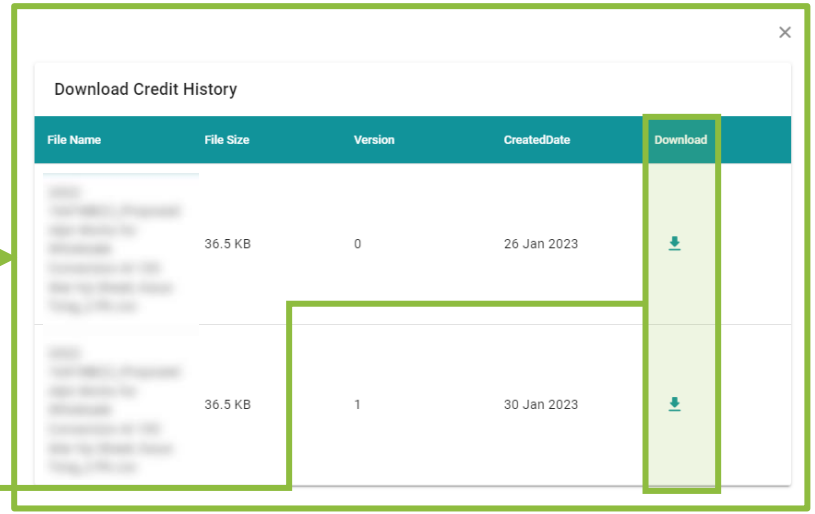
A5.4.11 Pre-Submission



Step 18 (Optional):
Click **Credits** to go back to the **Credit Summary Dashboard**



Step 16 (Optional):
Click **Credit History** of the Credit Summary

Step 17 (Optional):
Click ⬇ to **Download** the current or previous version of the Credit Summary

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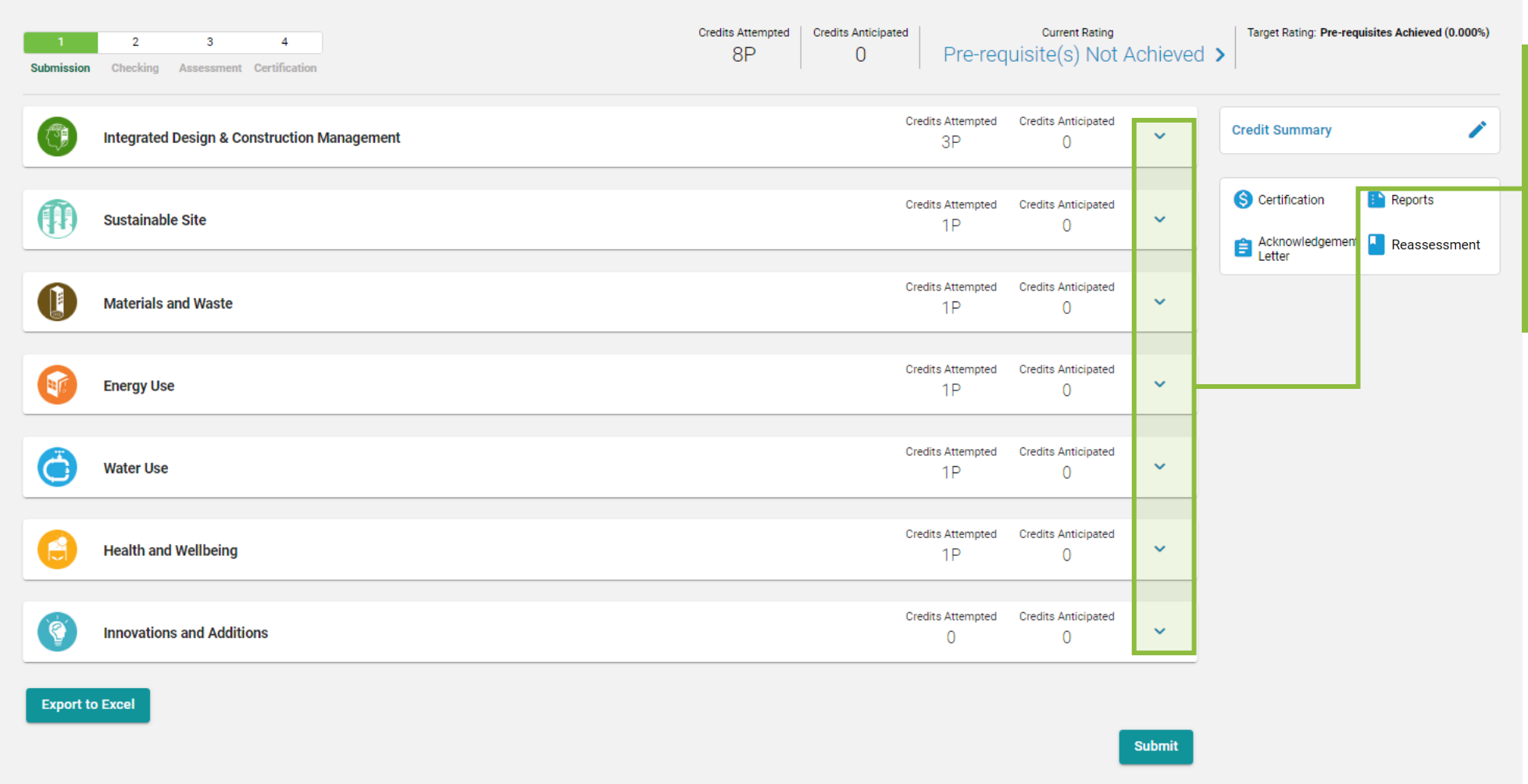
A5.4.12 Pre-Submission



Step 19: Going back to the **Credit Summary Dashboard**, Click ⌄ to access the detail credit information to each Aspect

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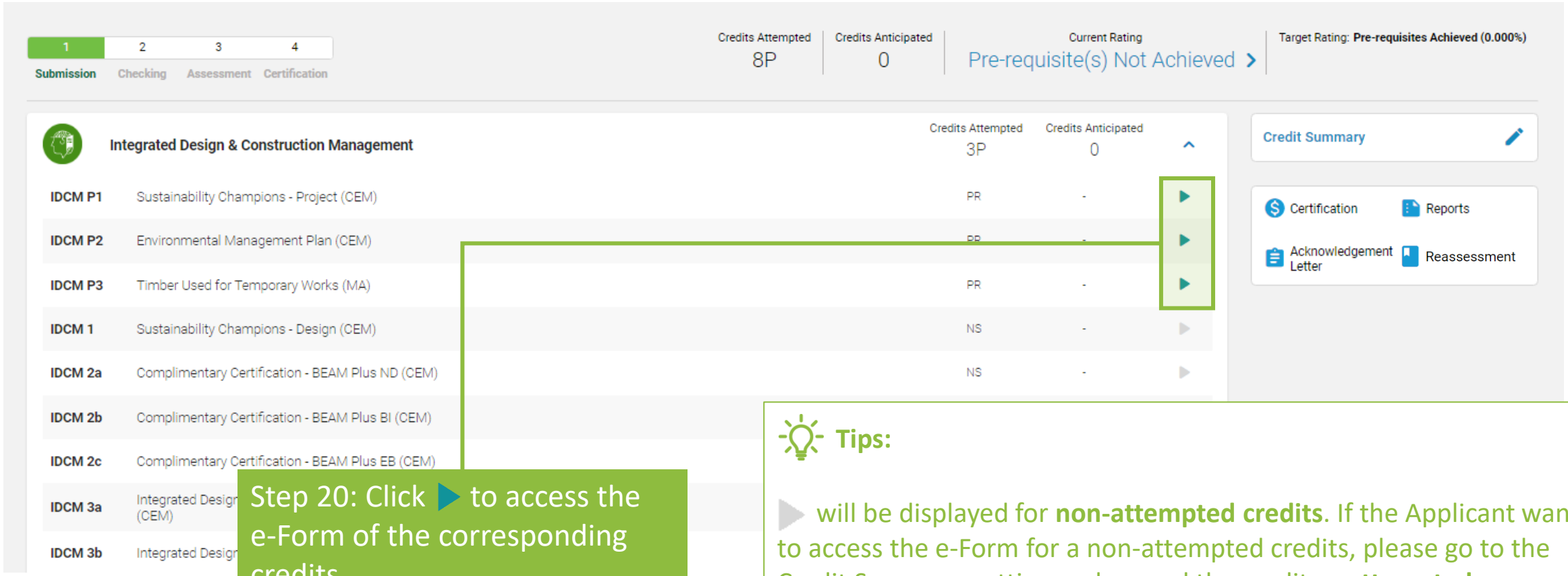
A5.4.13 Pre-Submission



Step 20: Click ▶ to access the e-Form of the corresponding credits

Tips:

▶ will be displayed for **non-attempted credits**. If the Applicant wants to access the e-Form for a non-attempted credits, please go to the Credit Summary setting and amend the credit as **attempted**.

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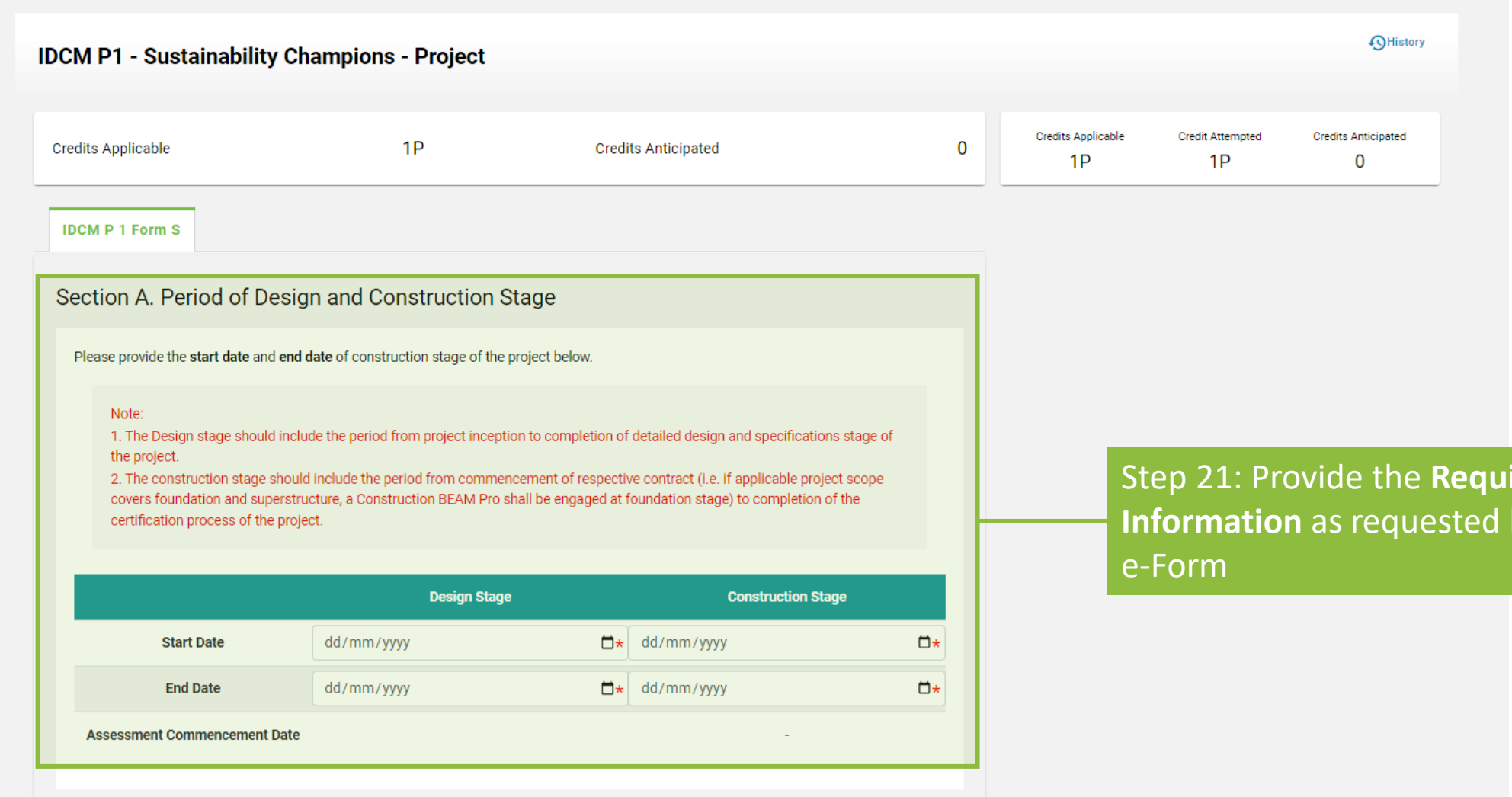
A5.4.14 Pre-Submission



Step 21: Provide the **Required Information** as requested by the e-Form

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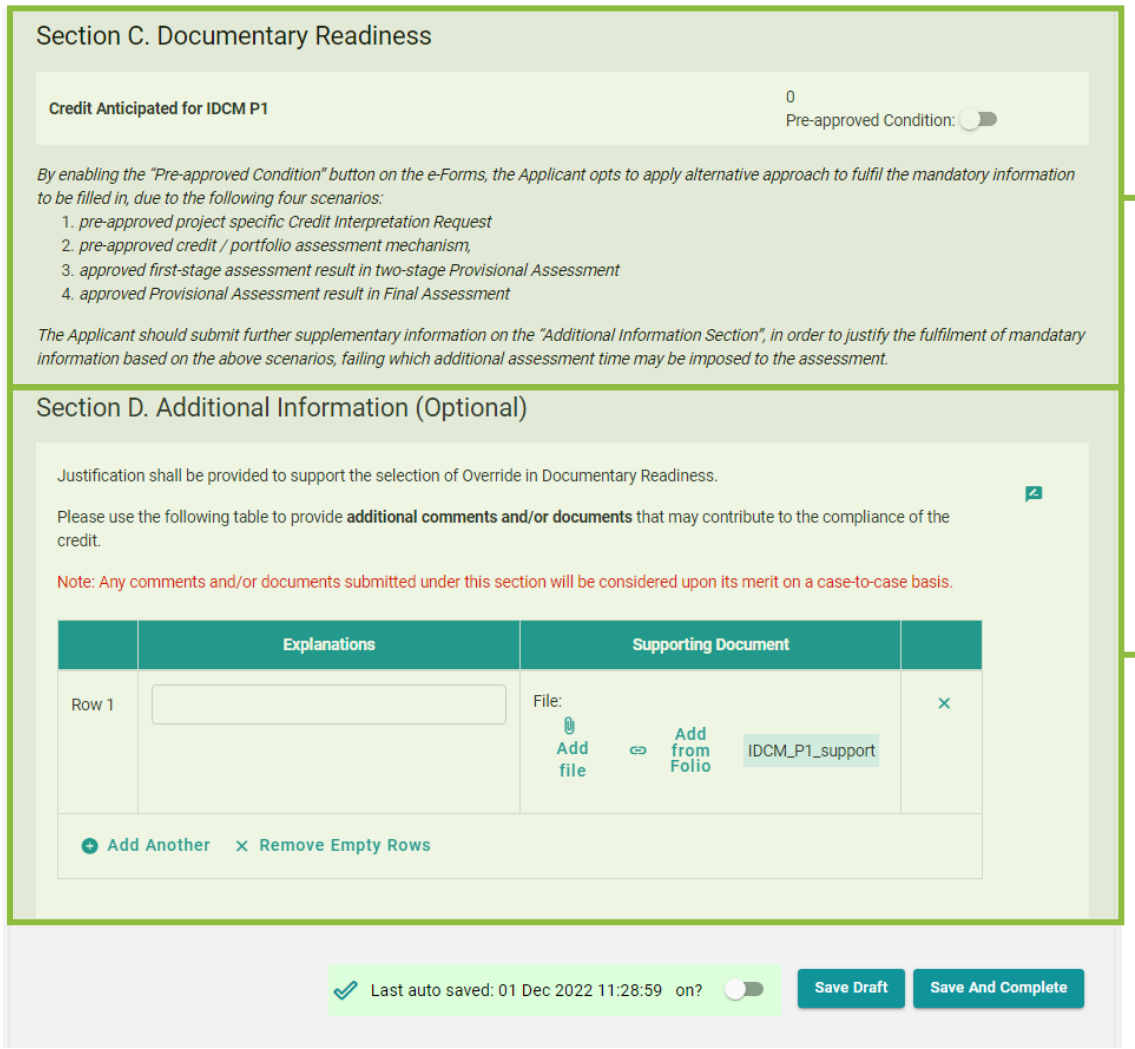
ALL

A5.4.15 Pre-Submission



Step 22 (Optional): Enable the **pre-approved condition** for the credit

Step 23 (Optional): Provide **Additional Information** to supplement the required information on the e-Form

Tips:

1. Upon completing all required information, **Scoring** will be indicated next to **Credit Anticipated**.
2. The Applicant is encouraged to provide all required information. The **Pre-approved Condition** function to the documentary readiness **should only be used when needed**.
3. Constant usage of the **Pre-approved Condition** function may result in **additional checking during assessment process**.
4. The Applicant should provide detailed information under **Additional information** section to substantiate the use of **Pre-Approved Condition** function.

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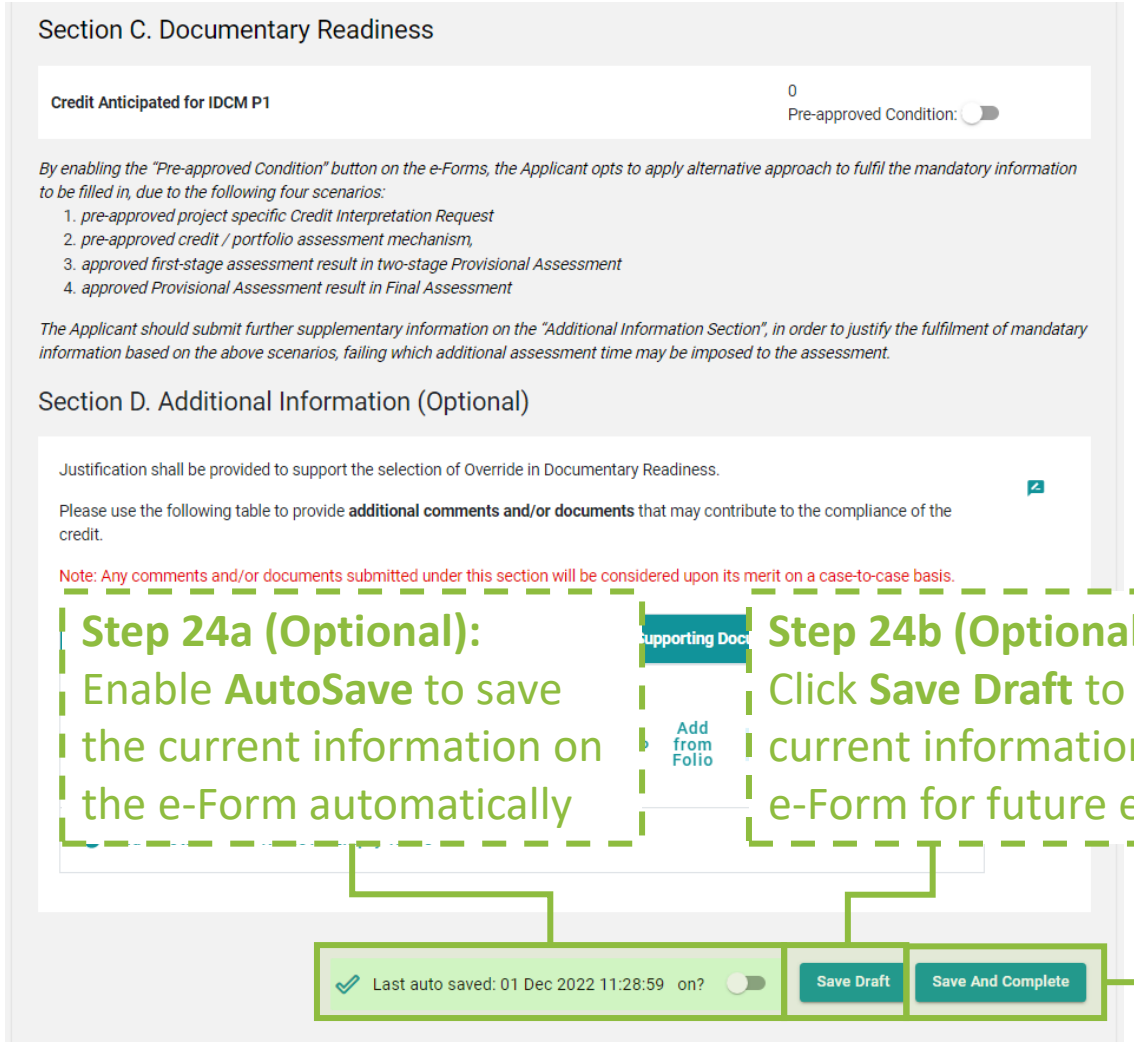
ALL

A5.4.16 Pre-Submission

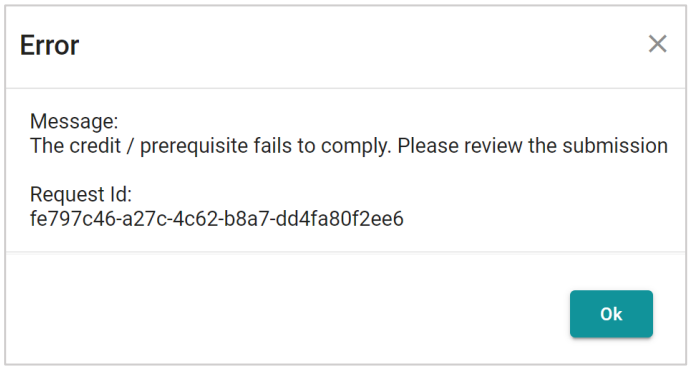


Step 24a (Optional):
Enable **AutoSave** to save the current information on the e-Form automatically

Step 24b (Optional):
Click **Save Draft** to save the current information on the e-Form for future editing

Step 24c: Click **Save and Complete** to save the information on the e-Form for assessment submission

Tips:



1. The above **dialogue box** will pop up if the e-Form **Fails** to comply with the Documentary Readiness check. Please review the e-Form to ensure that all required information has been provided.
2. If the form contains **Appendix**, please ensure each of the Appendix is saved before clicking the **Save and Complete** Button. The Appendix forms can be saved by clicking the **Save Draft** at the bottom of the e-Form.

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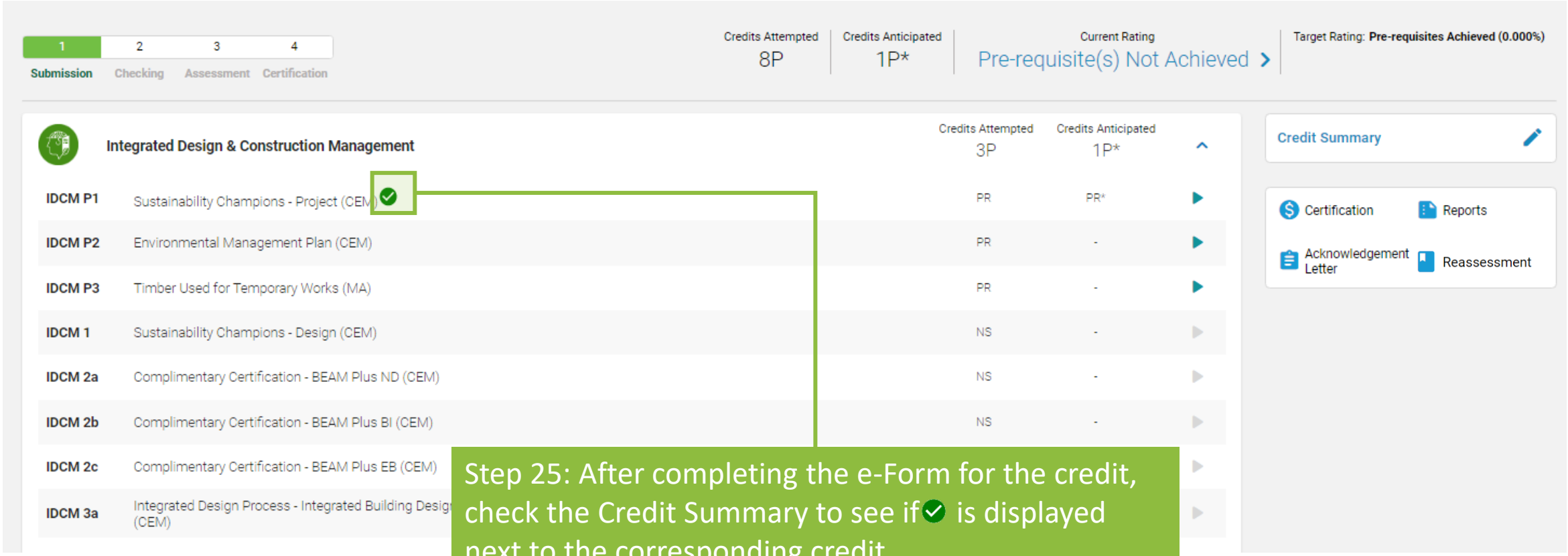
A5.4.17 Pre-Submission

ALL



Step 25: After completing the e-Form for the credit, check the Credit Summary to see if ✓ is displayed next to the corresponding credit

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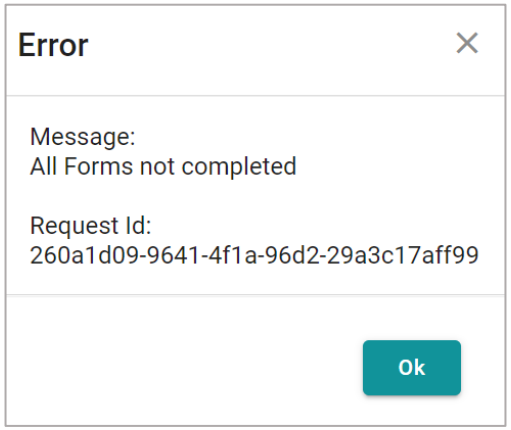
A5.4.18 Pre-Submission

ALL

Step 26: After completing all the e-Forms, click **Submit** to submit the submission for assessment

Tips:



1. The above **dialogue box** will pop up if one of the form **Fails** to comply with the Documentary Readiness check. Please review the Credit Summary dashboard to ensure a ✅ is indicated next to ALL attempted credits.
2. The **submit** will be **hidden** if the Applicant has not settled the project's agreement or invoice in full. If the Applicant wishes to submit the assessment without the complete settlement of agreement and/or invoice, please contact the **Finance and Contracting Team** at BSL via the **enquiry function** on iBEAM or by phone at **3610 5700**.

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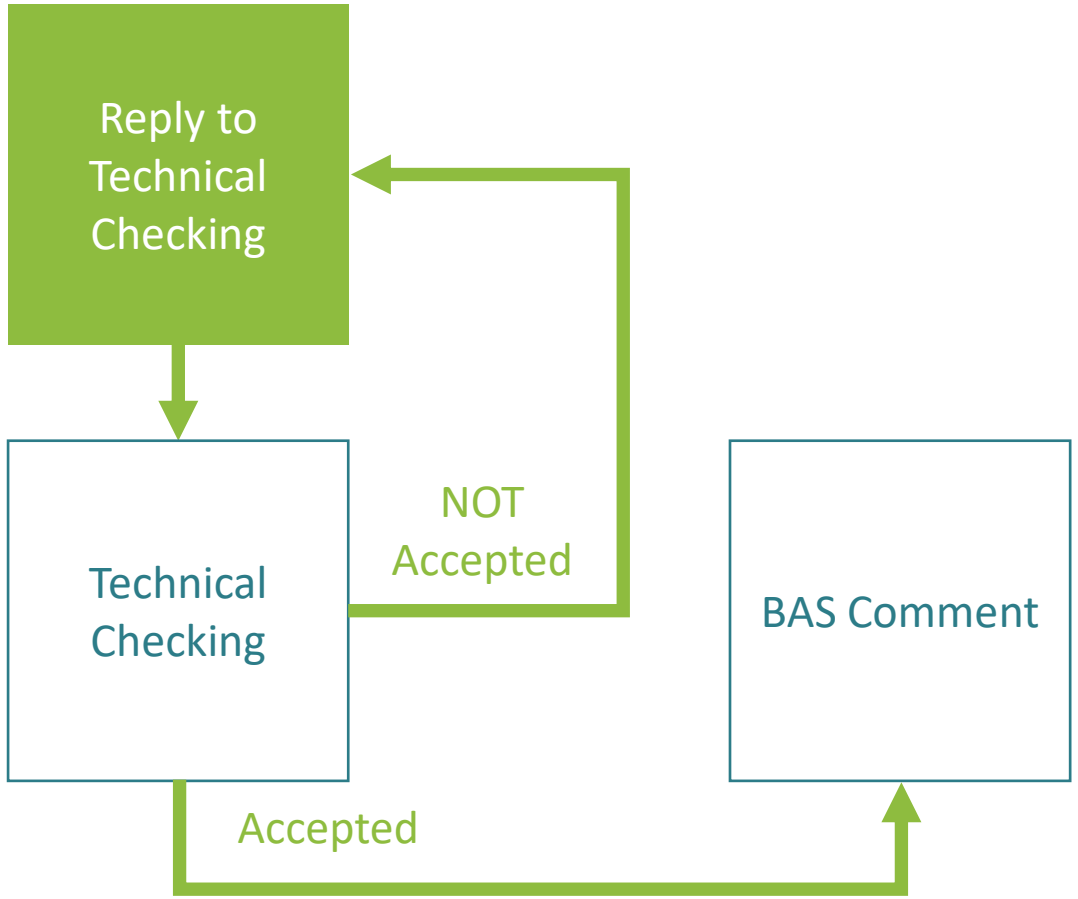
A5.5 Reply to Technical Checking

Process Overview



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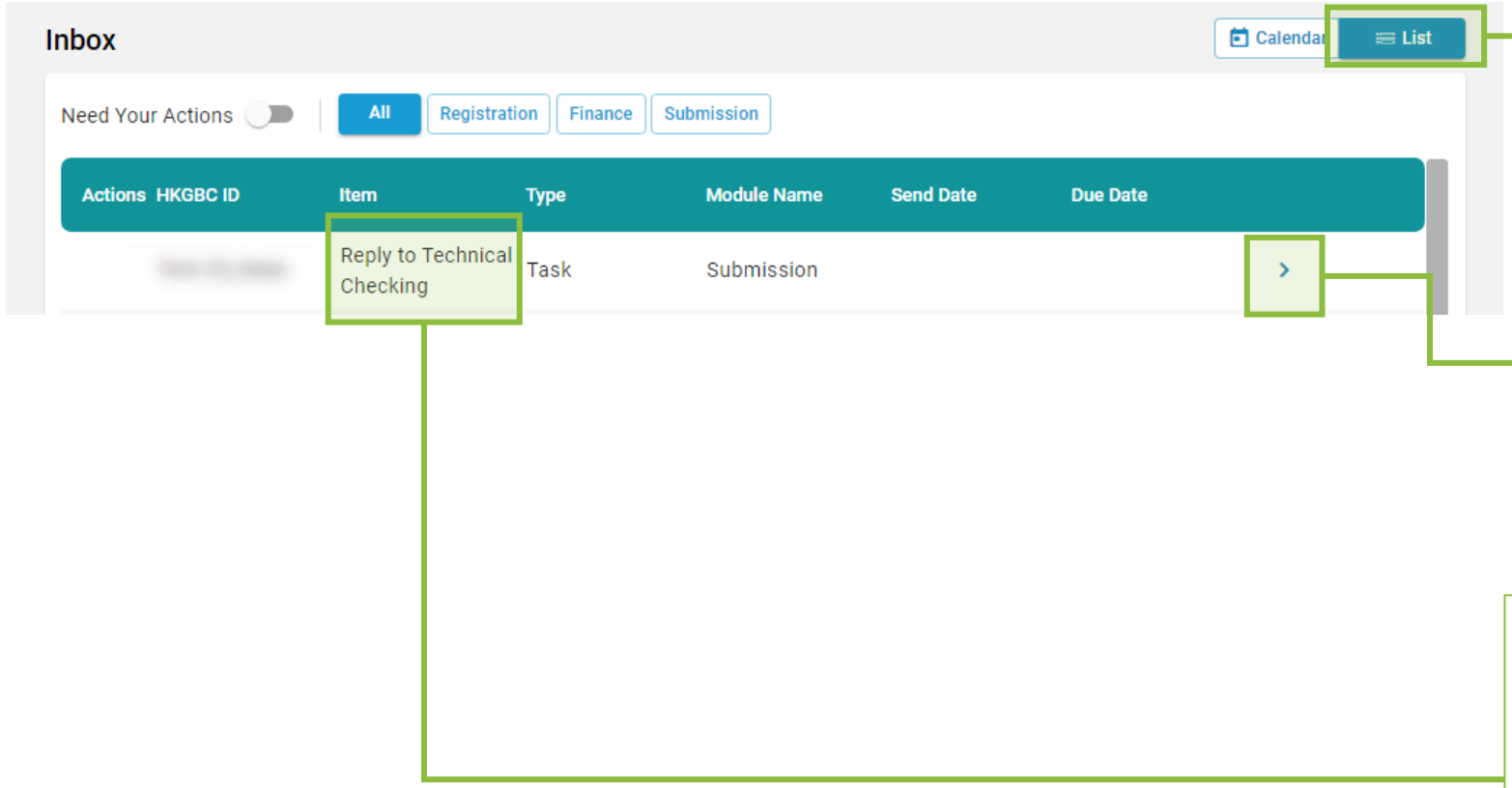
A5.5.1 Reply to Technical Checking



Step 1:
In the **Account Dashboard**, click **List** view under **Inbox**

Step 2:
Once Technical Checking Comments have been issued, **Notification** will be shown in the **Inbox** requesting the Applicant to **Reply** to the comments. Click the link provided in the notification to access the project

Tips:

For items that require Applicants to respond to Technical Checking Comments, the identity of **Reply to Technical Checking Comments** will be shown under **Item**.

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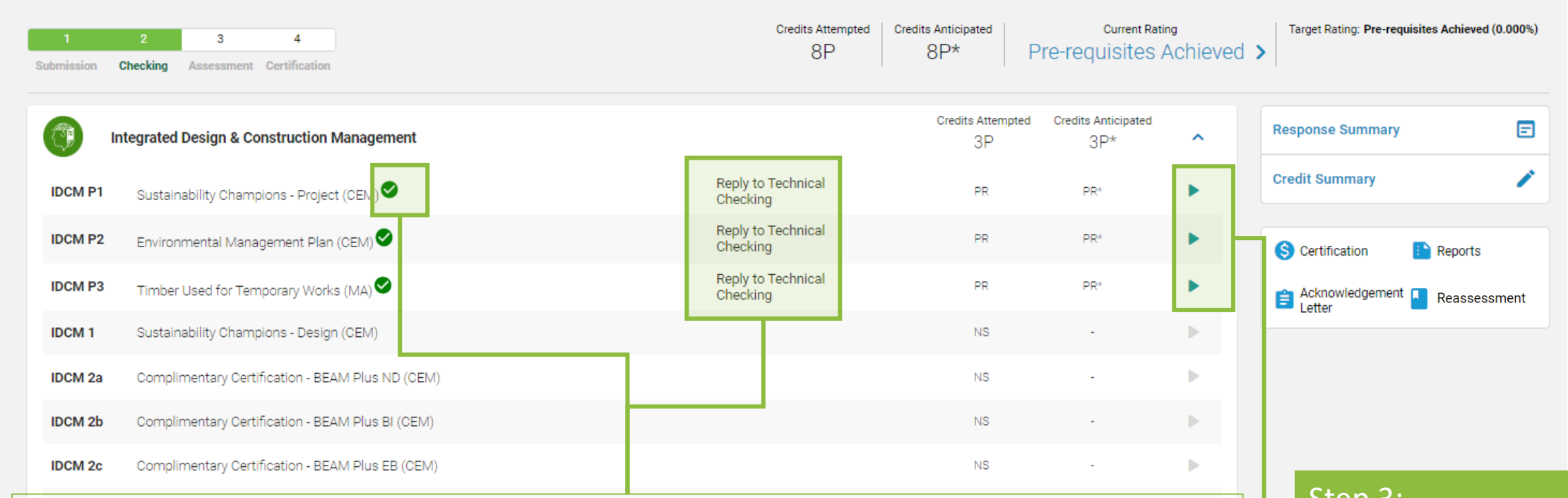
A5.5.2 Reply to Technical Checking



Step 3:
Click ▶ to review the e-form

Tips:

1. For credits with BAS Comments issued, the identity of **Reply to BAS Comments** will be shown.
2. By default, iBEAM will mark ✔ next to the credits that do not require reply from the Applicant.

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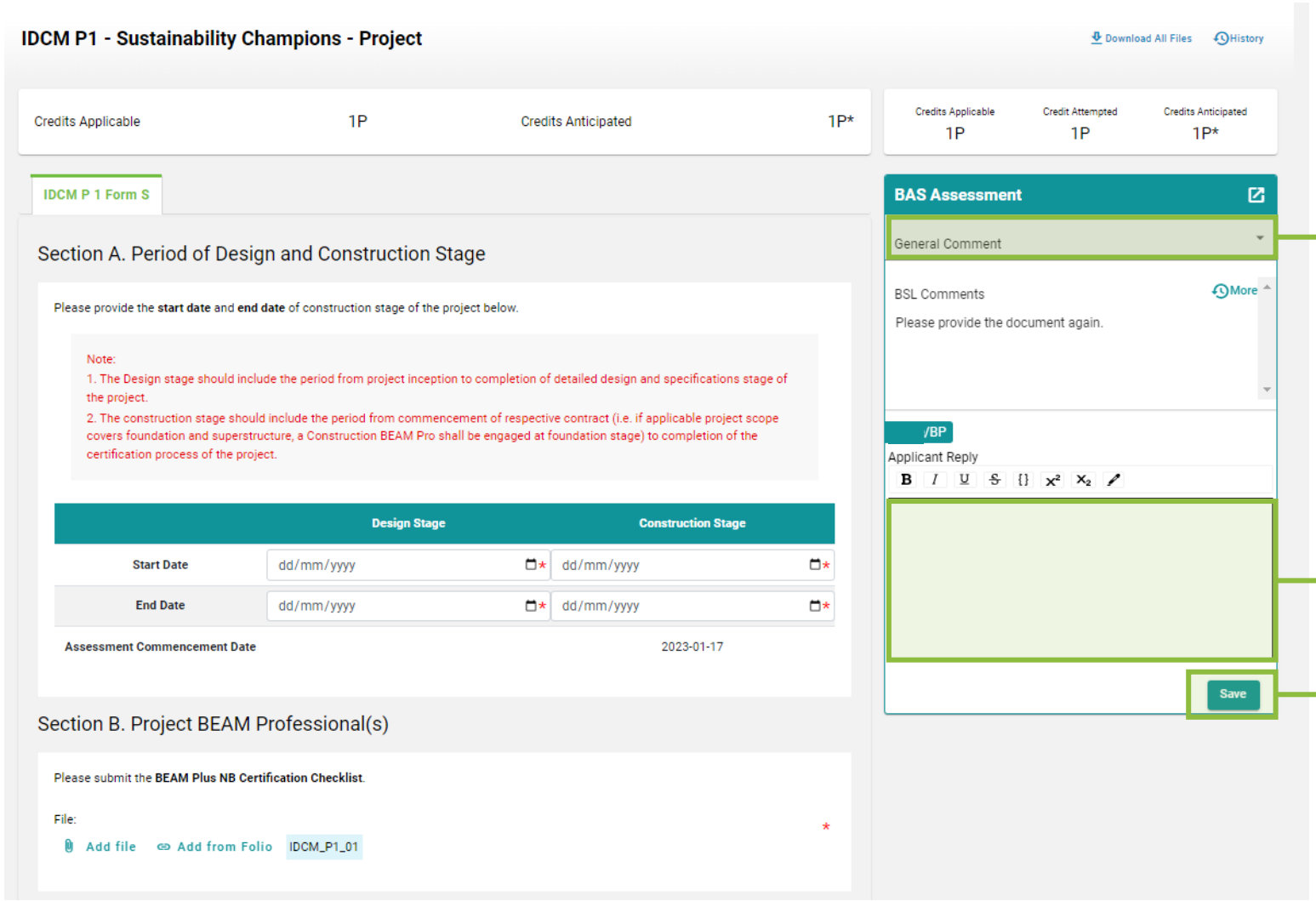
A5.5.3 Reply to Technical Checking



Step 4: Select **General Comment** to review the **General Comment** issued on the e-Form

Step 5: If comment has been issued, type the reply in the **Comment Box**

Step 6: Click **Save** to save the reply to the comments made in the **General Comment**

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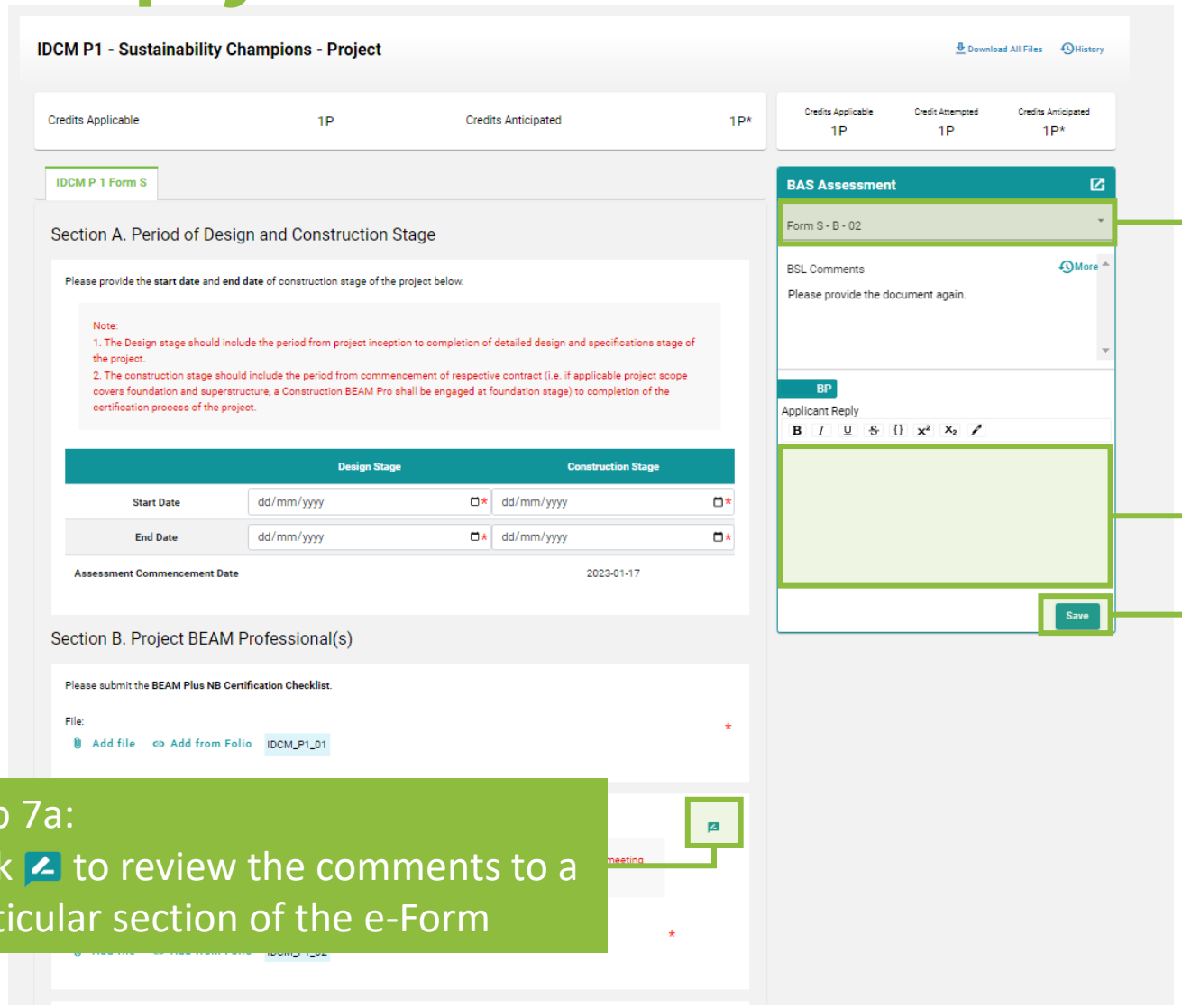
A5.5.4 Reply to Technical Checking



Step 7b (Optional):
Use the **Dropdown Menu** to navigate between the comment area of **Different Sections**

Step 8: If comment has been issued, type the reply in the **Comment Box**

Step 9: Click **Save** to save the reply to the comments made for the section

Step 7a:
Click to review the comments to a particular section of the e-Form

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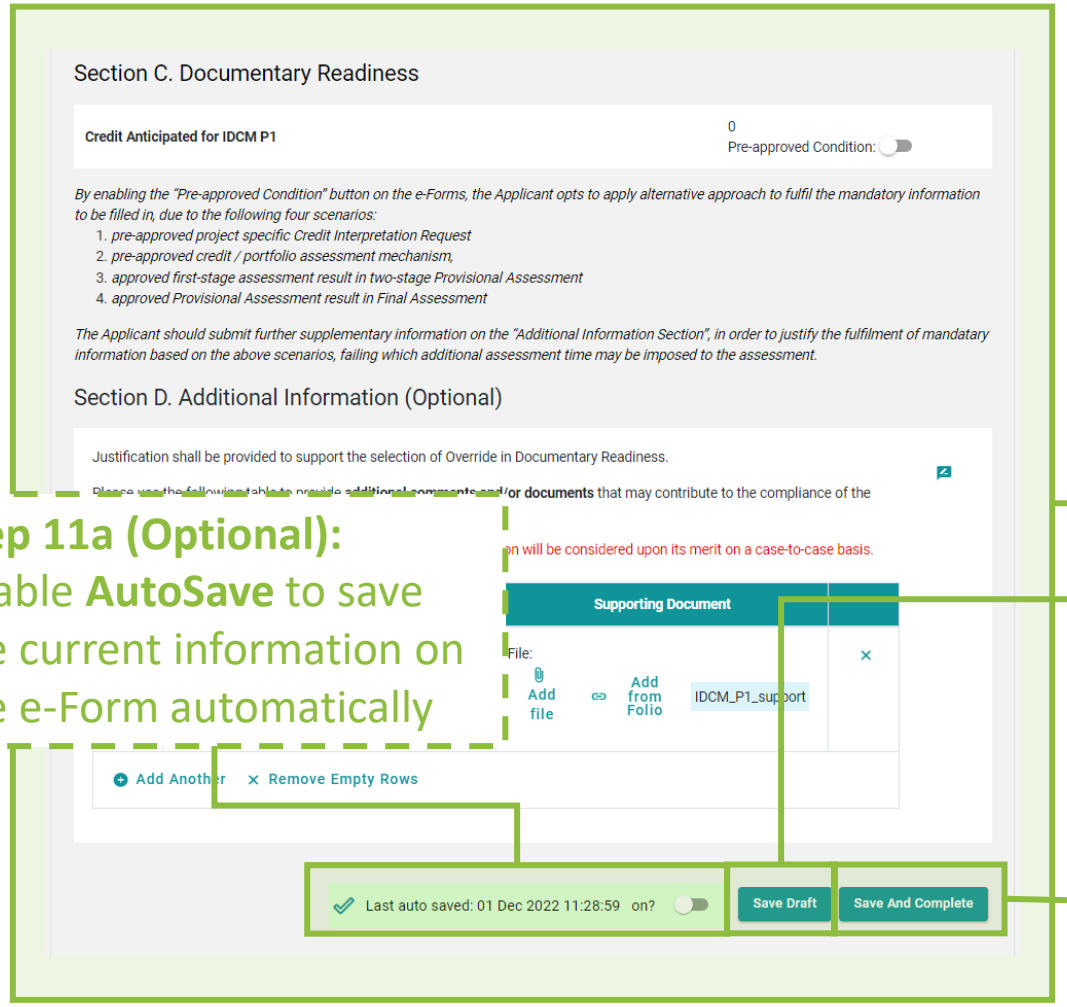
A5.5.5 Reply to Technical Checking



Step 10 (Optional):
Amend the **Information** provided on the e-Form

Step 11a (Optional):
Enable **AutoSave** to save the current information on the e-Form automatically

Step 11b (Optional):
Click **Save Draft** to save the current information on the e-Form for future editing

Step 11c: Click **Save and Complete** to save the information on the e-Form for assessment submission

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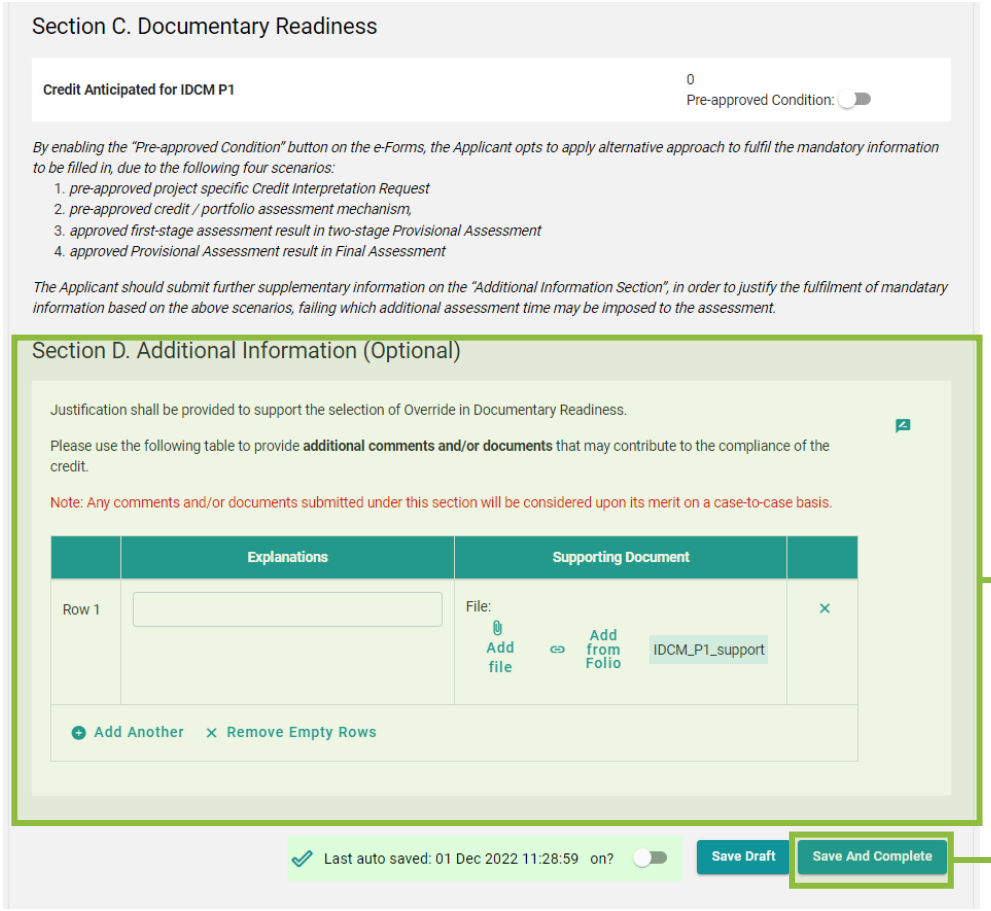
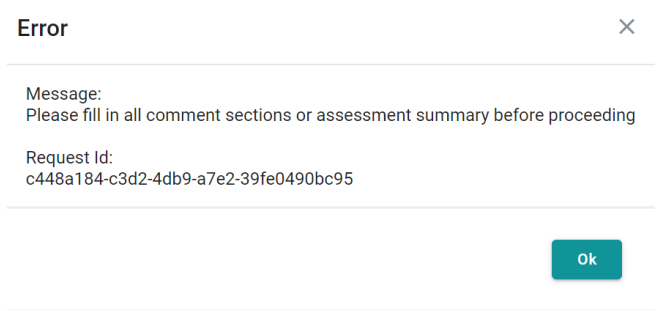
A5.5.6 Reply to Technical Checking



Tips:



1. The above **dialogue box** will pop up if the Applicant **Fails** to respond all Technical Checking comments issued. Please review all comments provided in the comment box and provide all necessary information on the e-Form.
2. If there are **CHANGES** made to the e-Form, the Applicant is suggested to specify the changes in the **Additional Information**.
3. If the form contains **Appendix**, please ensure each of the Appendix is saved before clicking the **Save and Complete** Button. The Appendix forms can be saved by clicking the **Save Draft** at the bottom of the e-Form.

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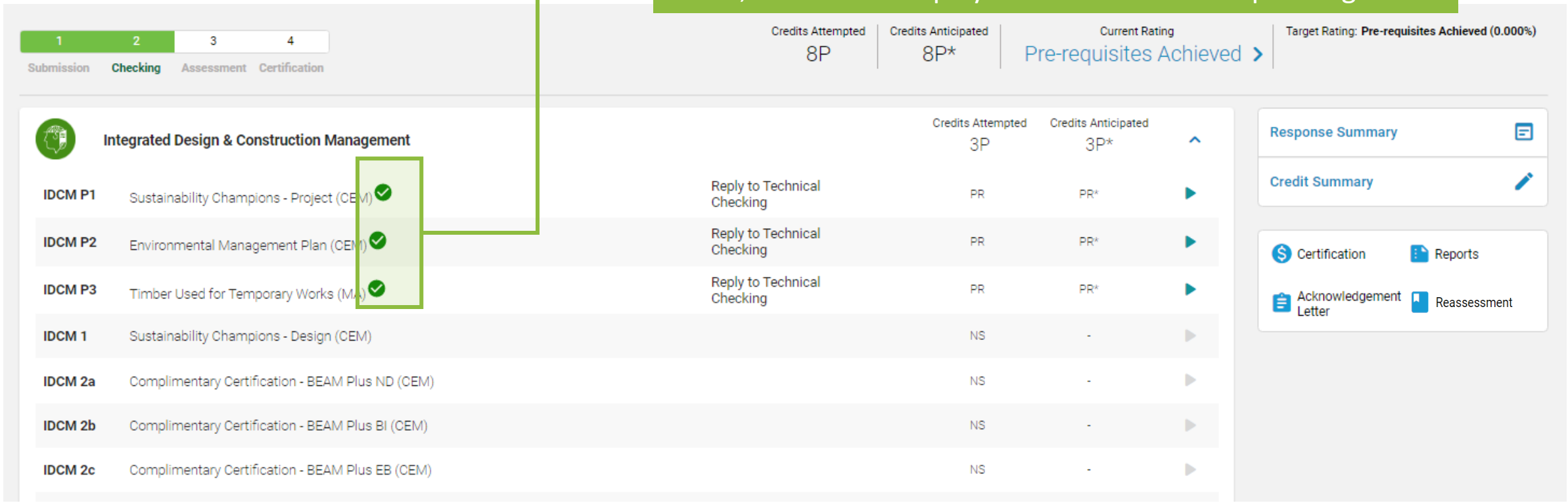
A5.5.7 Reply to Technical Checking

Step 12: Upon completing the review of the e-Form for the credit, ✅ shall be displayed next to the corresponding credit



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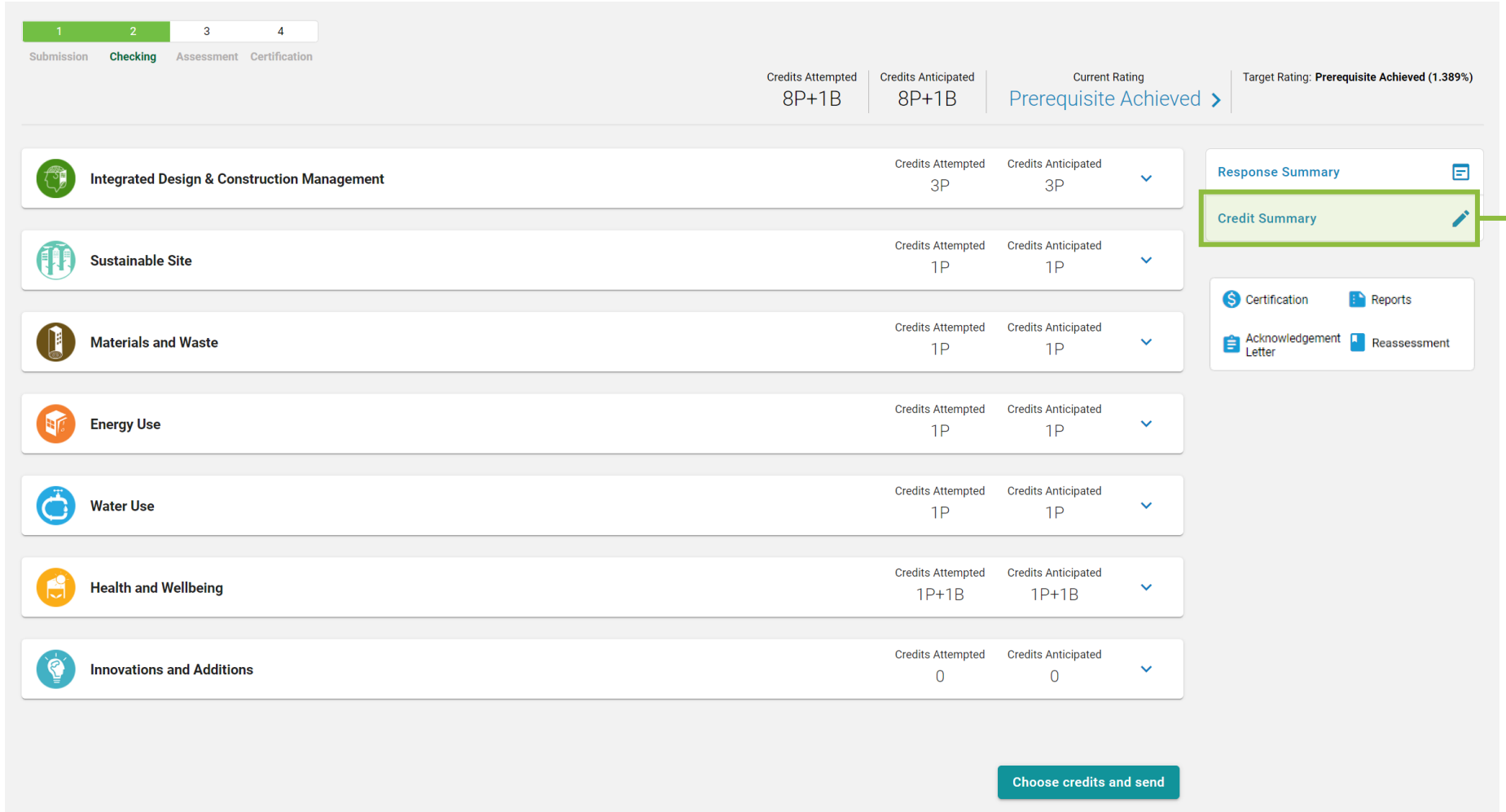
ALL

A5.5.8 Reply to Technical Checking



Step 13:
Click **Credit Summary** to review the information provided for the **General Information** and *where necessary*, amend the **Targeted Number of Credits**

➔ **Please proceed to Step 21b (Section A5.5.13) for** EBP 2.0 **projects**

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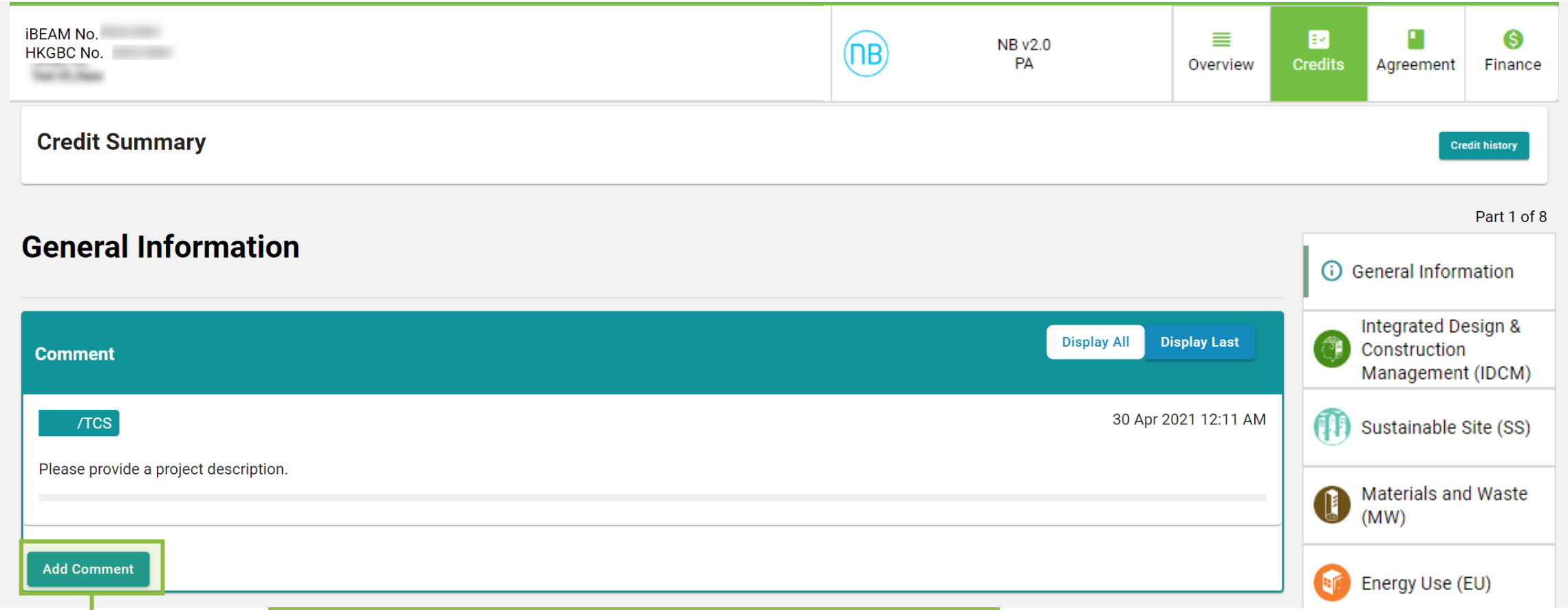
A5.5.9 Reply to Technical Checking



Step 14: *If comment is available*, click **Add Comment** to make a response to the comments issued

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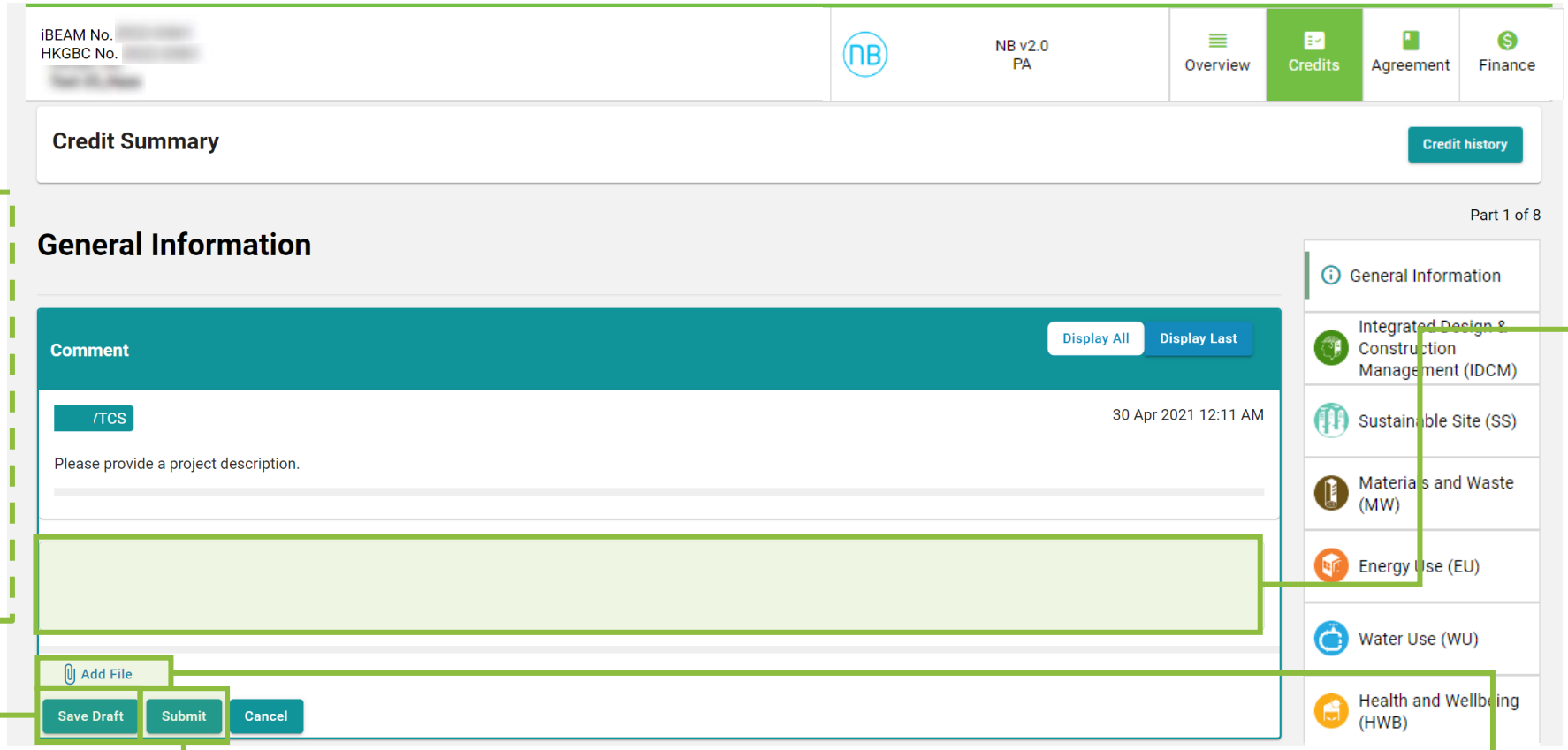
A5.5.10 Reply to Technical Checking



Step 17a (Optional): Click **Save Draft** to save the information made on the comment box for later editing

Step 15: Make the relevant reply to the comments in the **Comment** box

Step 17b: Click **Submit** to save the reply made to the General Information

Step 16 (Optional): **Add File** to support for the comment

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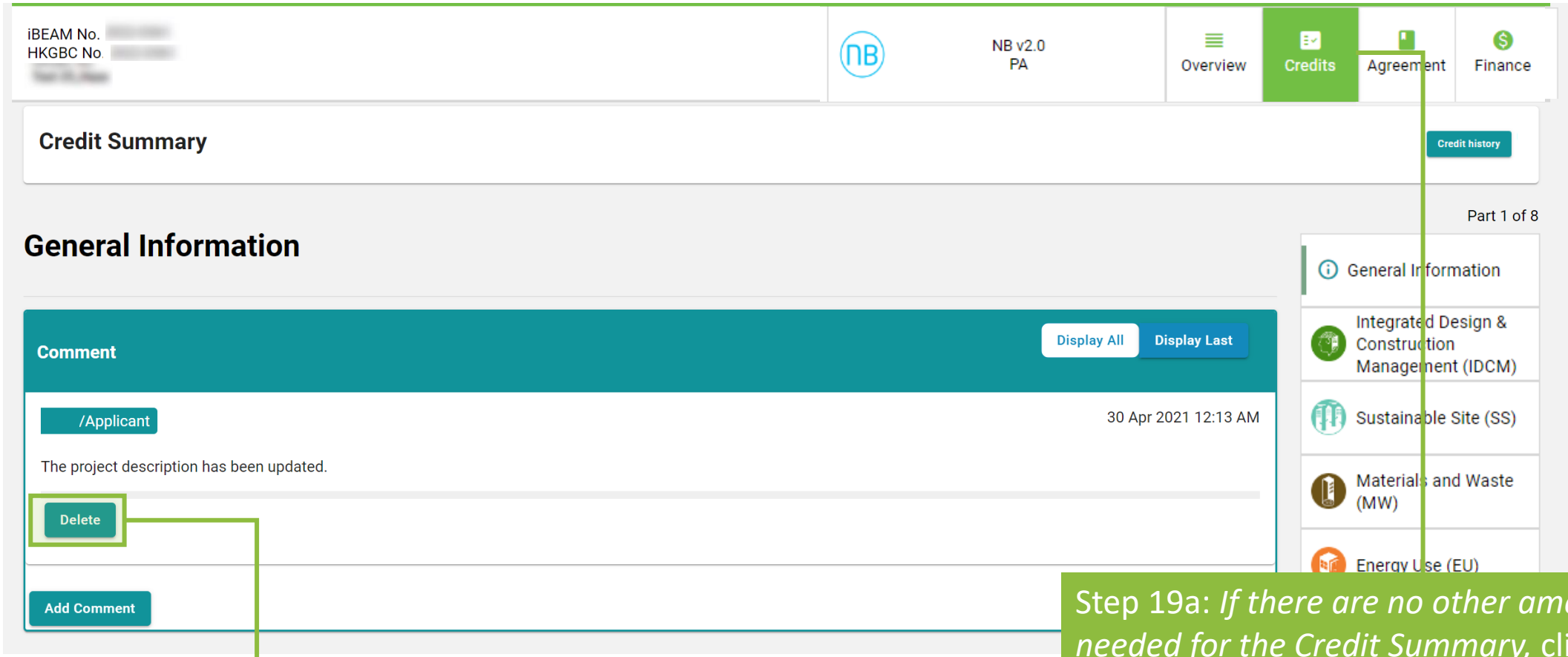
A5.5.11 Reply to Technical Checking



Step 18: Click **Delete** to remove replies made previously in General Information

Step 19a: *If there are no other amendments needed for the Credit Summary,* click **Credits** to go back to the **Credit Summary Dashboard** and *proceed to Step 26*

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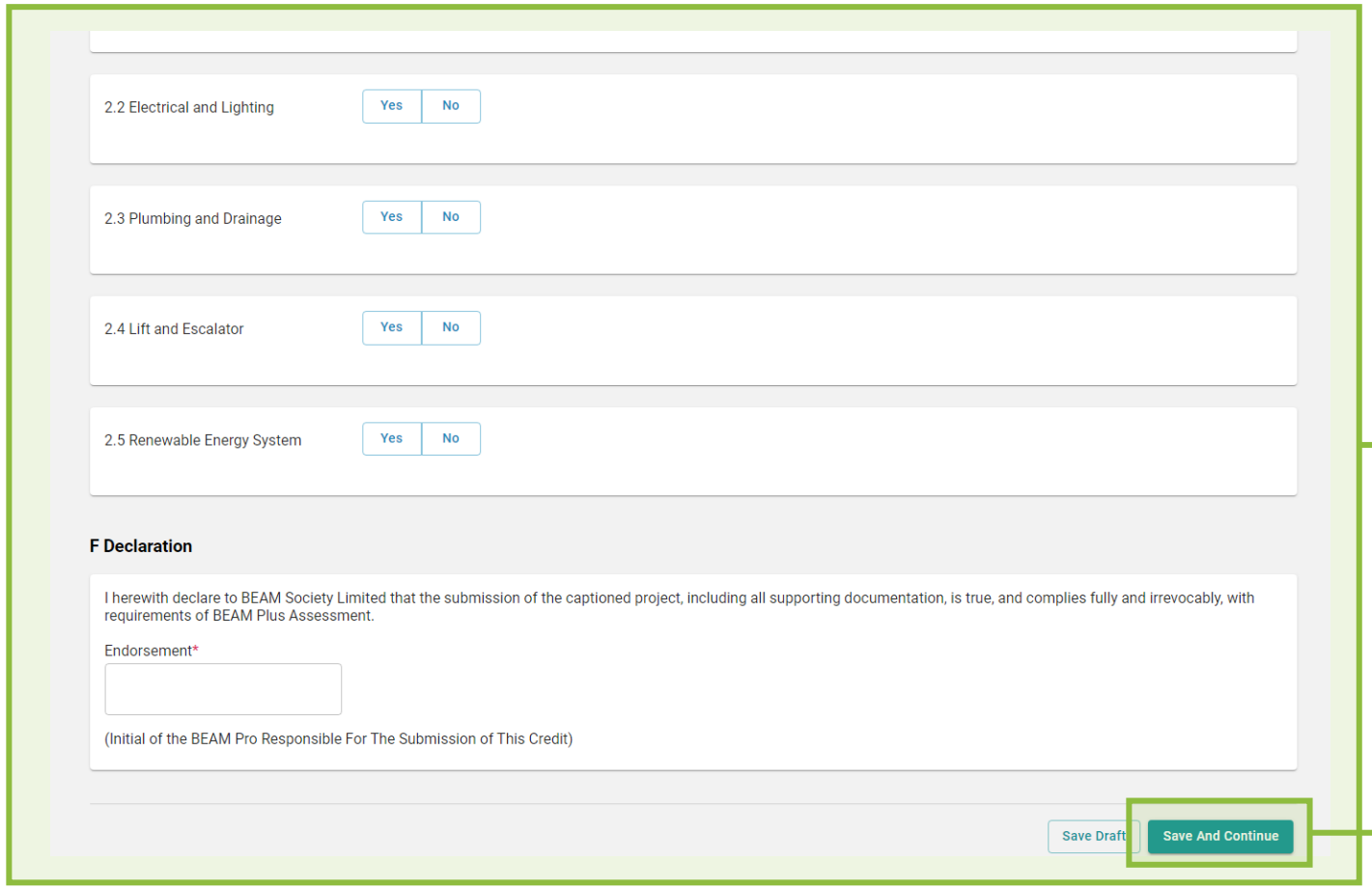
A5.5.12 Reply to Technical Checking

Follow the subsequent steps if *amendments are needed for the Credit Summary* after **Step 17**.



Step 19b (Optional):
Scroll down to amend information in the **General Information** page

Step 20b: Click **Save and Continue** to proceed entering information in individual Aspect

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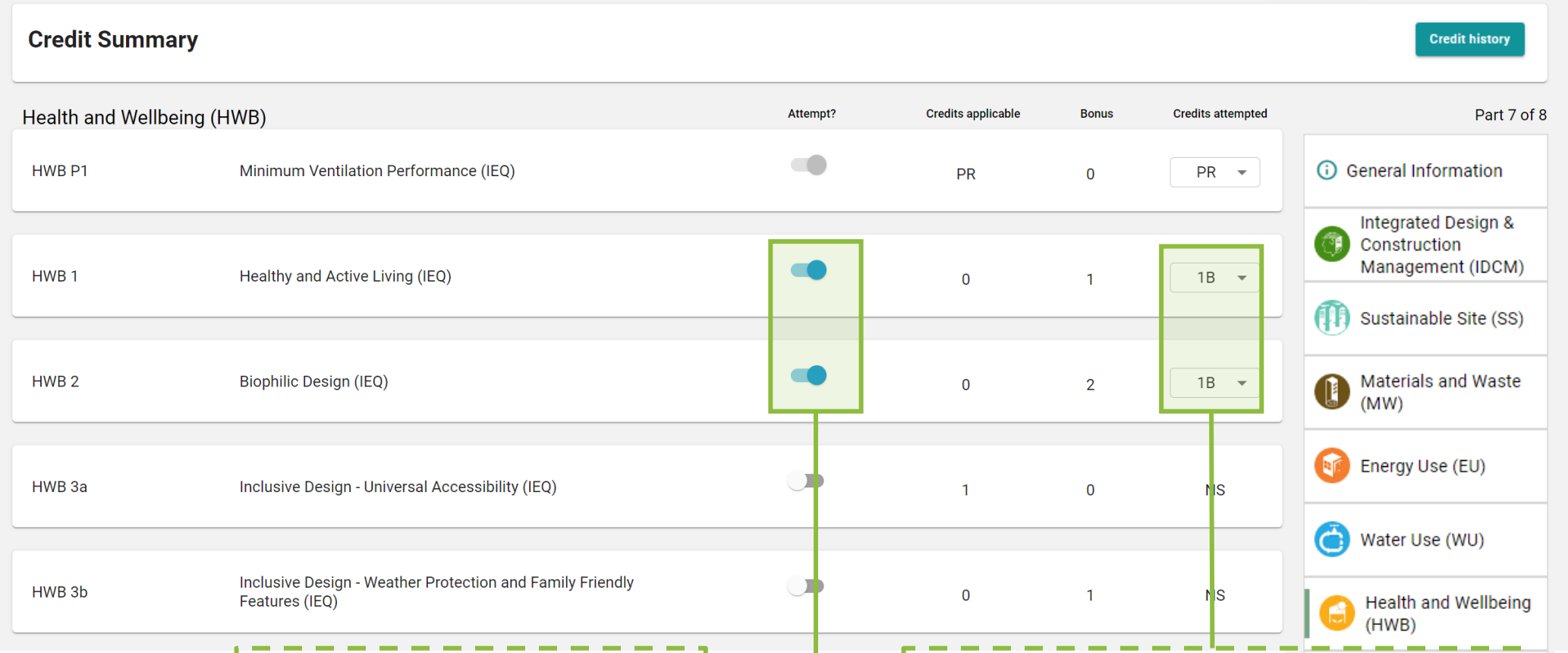
A5.5.13 Reply to Technical Checking



Step 21b (Optional):
Select **Attempt** for the newly attempted credits

Step 22b (Optional):
Select the **Credit Scoring** for the newly attempted credits

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A5.5.14 Reply to Technical Checking

HWB 10a	Artificial Lighting - Normally Occupied Spaces (IEQ)		1	0	NS
HWB 10b	Artificial Lighting - Not Normally Occupied Spaces and Unoccupied Spaces (IEQ)		1	0	NS
HWB 11	Daylight (IEQ)		0	2	NS
HWB 12	Biological Contamination (IEQ)		1	0	NS
		Total	**19**		**0+0B**

Save Continue

Tips:

iBEAM will direct back to the **Credit Summary Dashboard** when the **Continue** is clicked on the Innovation and Additions (IA) page.

Step 23b(i):
Click **Save** to save the information on the current Aspect

Step 23b(ii) (Optional):
Click **Continue** to proceed entering information in individual Aspect

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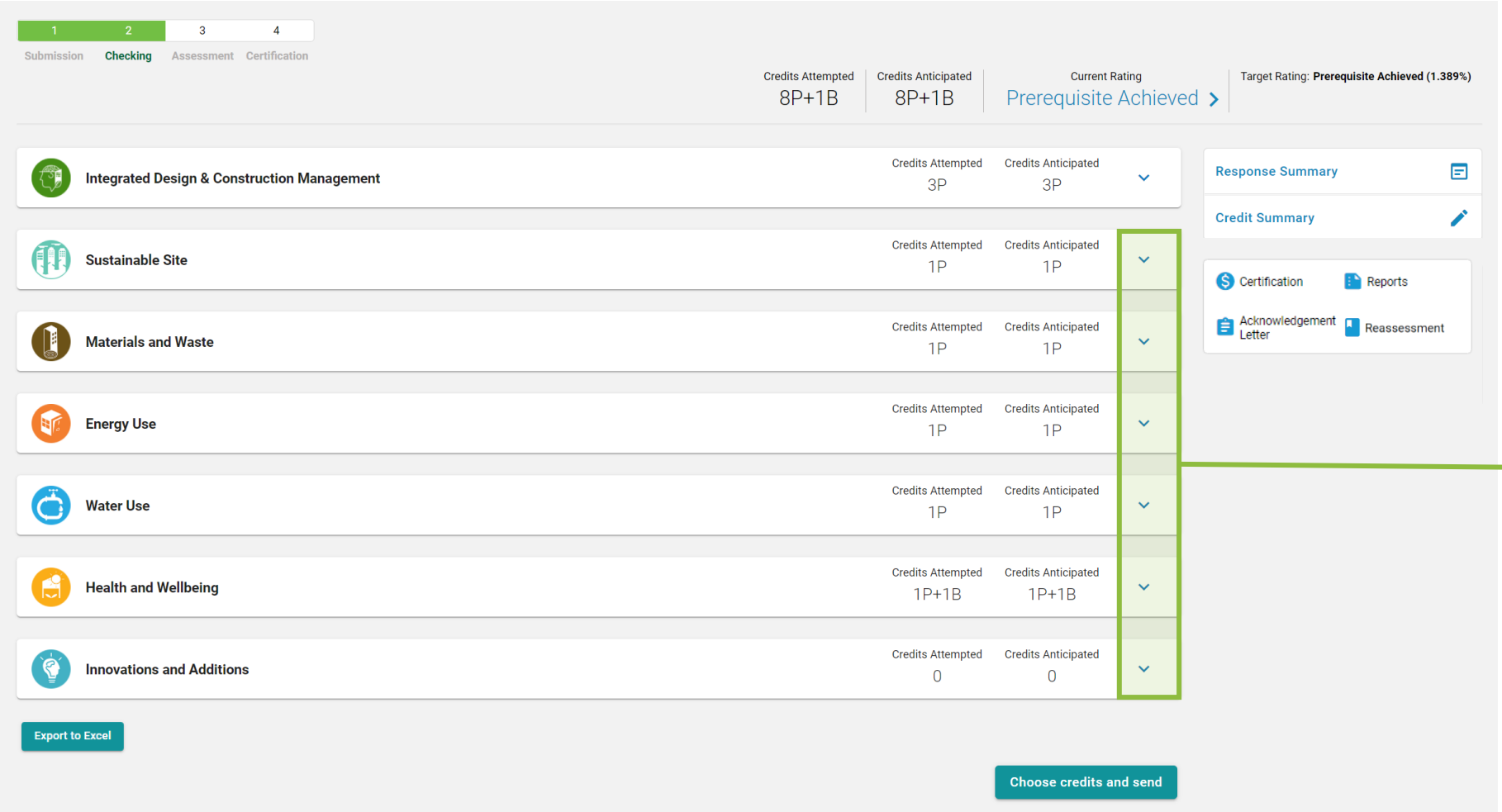
A5.5.15 Reply to Technical Checking



Step 24: At the **Credit Summary Dashboard**, Click ⌄ to access the detail credit information to each Aspect

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ALL

A5.5.16 Reply to Technical Checking

Tips:

For the newly attempted credits, there shall be no indicators displayed on the Credit Summary.

Step 25: Click ▶ to access and complete the e-Form of the newly attempted credits

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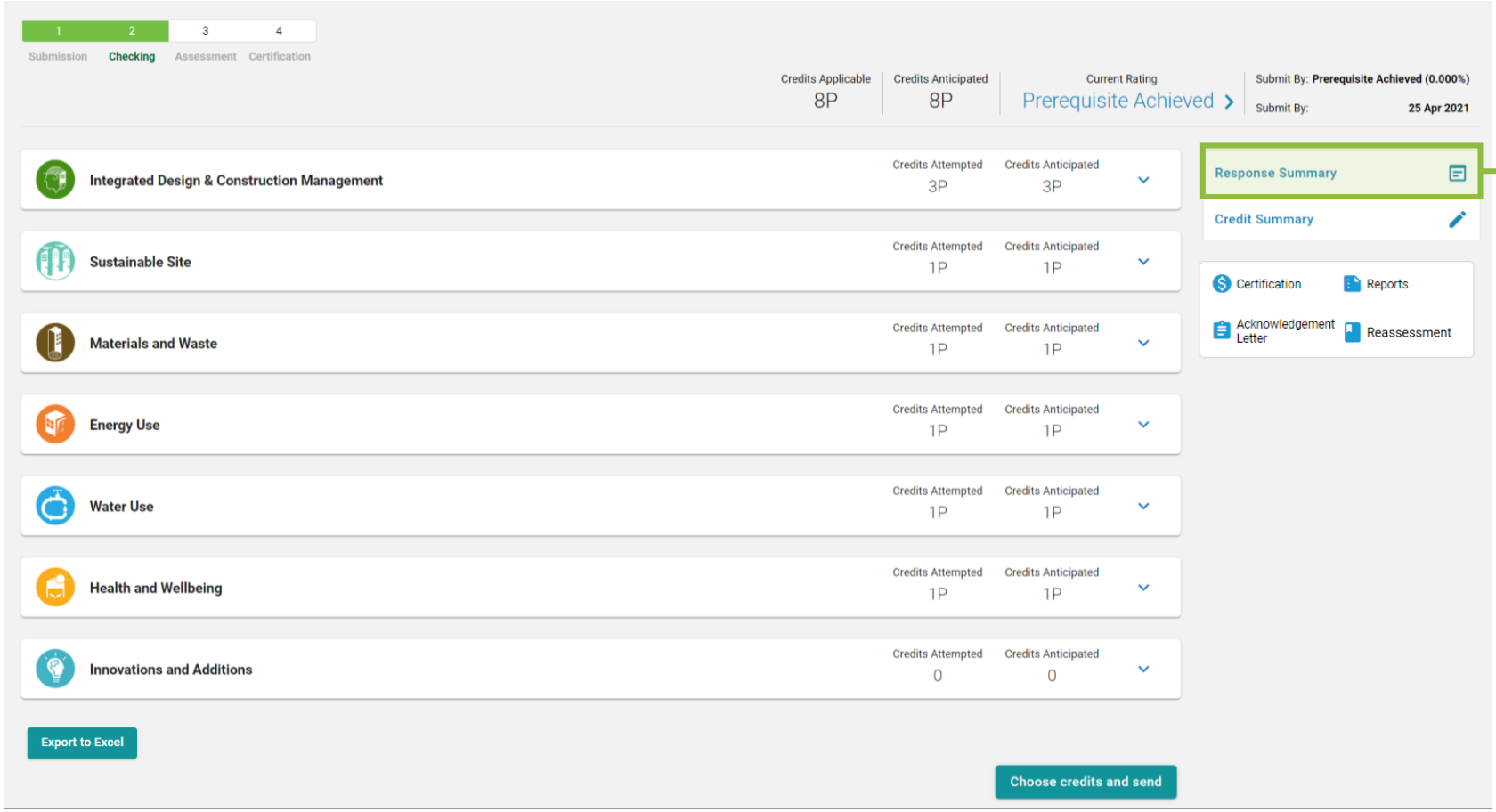
A5.5.17 Reply to Technical Checking



Step 26 (Optional):
Click **Response Summary** to view the summary of replies made to all submitted e-Forms

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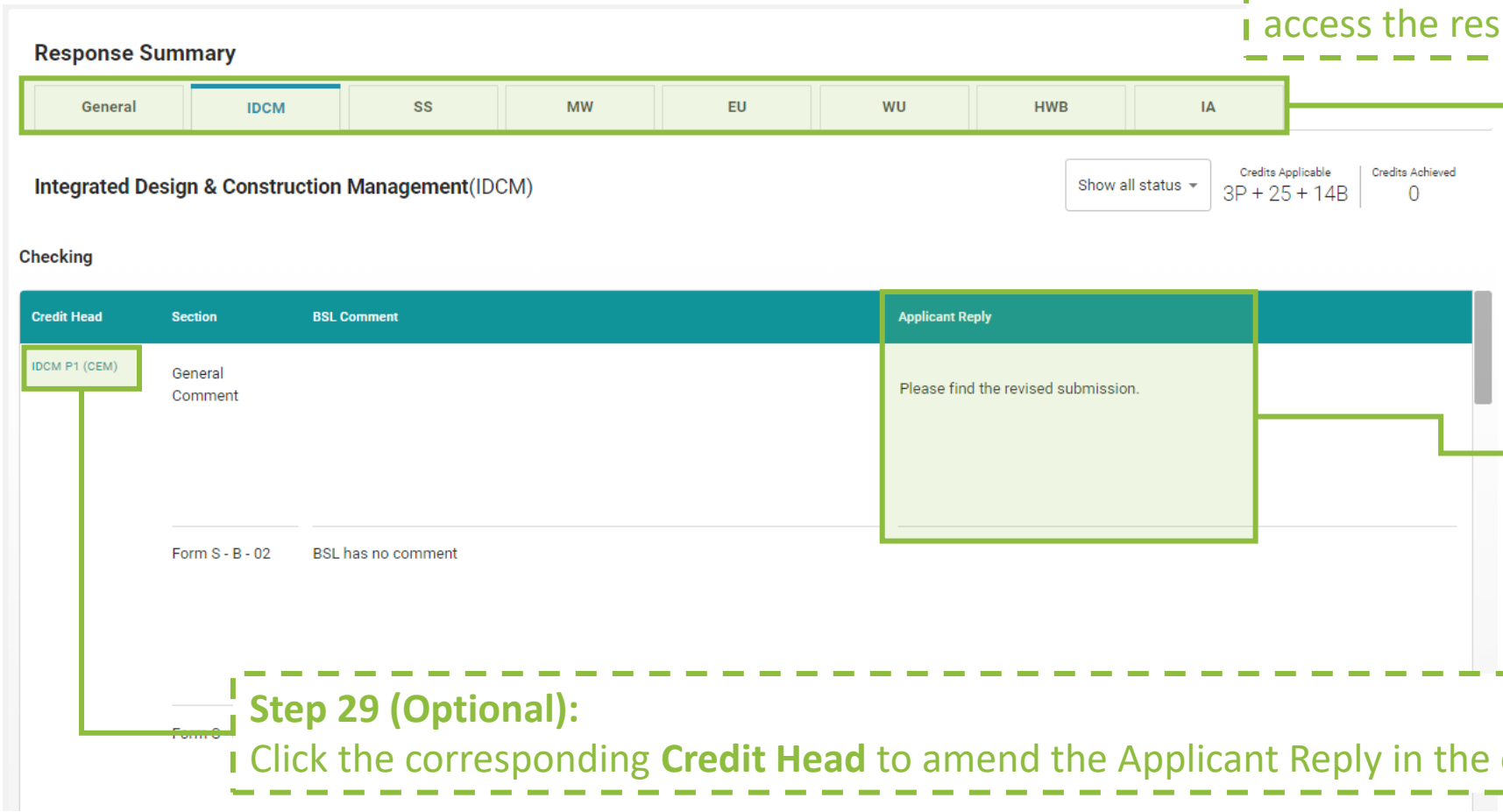
A5.5.18 Reply to Technical Checking

Step 27 (Optional):
Click on the different Aspect tab on the top to access the response summary of the Aspect



Step 28 (Optional):
Validate the reply to the Technical Checking under the **Applicant Reply** column

Step 29 (Optional):
Click the corresponding **Credit Head** to amend the Applicant Reply in the e-Form

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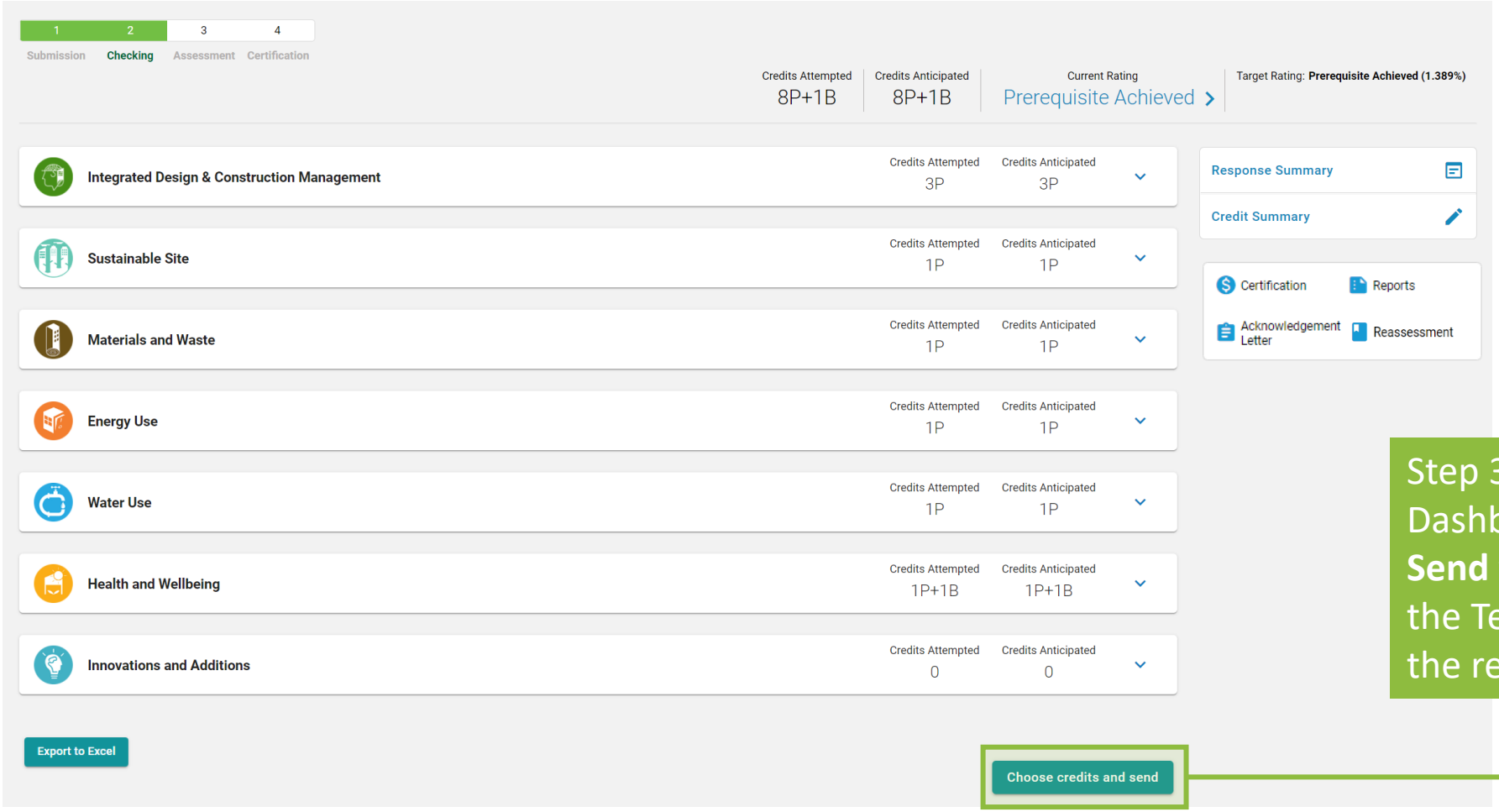
A5.5.19 Reply to Technical Checking



Step 30: Back to the Credit Summary Dashboard, click **Choose Credits and Send** to complete making a reply to the Technical Checking and submitting the revised submission for assessment

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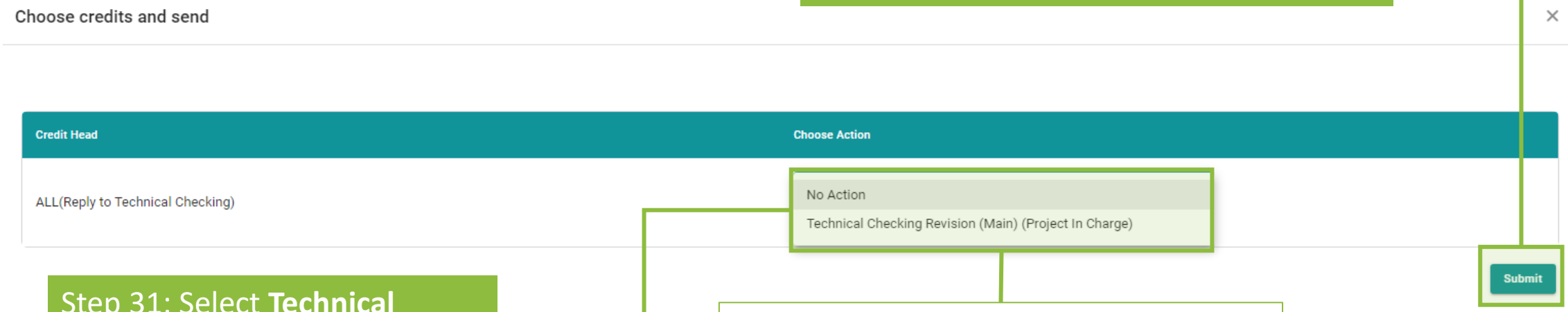
A5.5.20 Reply to Technical Checking

Step 32: Click **Submit** to confirm sending out the reply to Technical Checking



Step 31: Select **Technical Checking** to instruct iBEAM to send out the reply to Technical Checking

Tips:

Technical Checking option will only be shown if the comments to the e-Form have been **properly completed for all submitted credits under that Aspect**.

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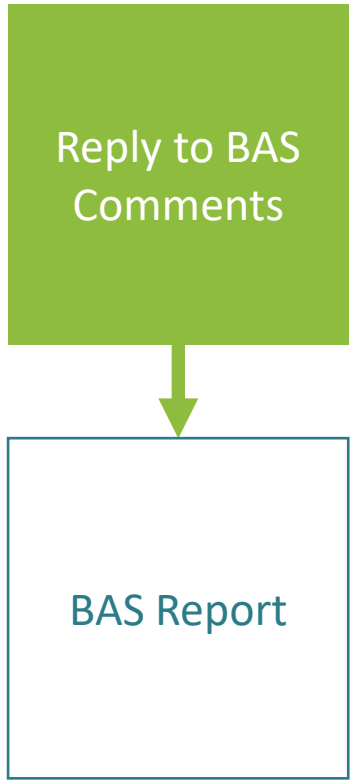
A5.6 Reply to BAS Comments

Process Overview



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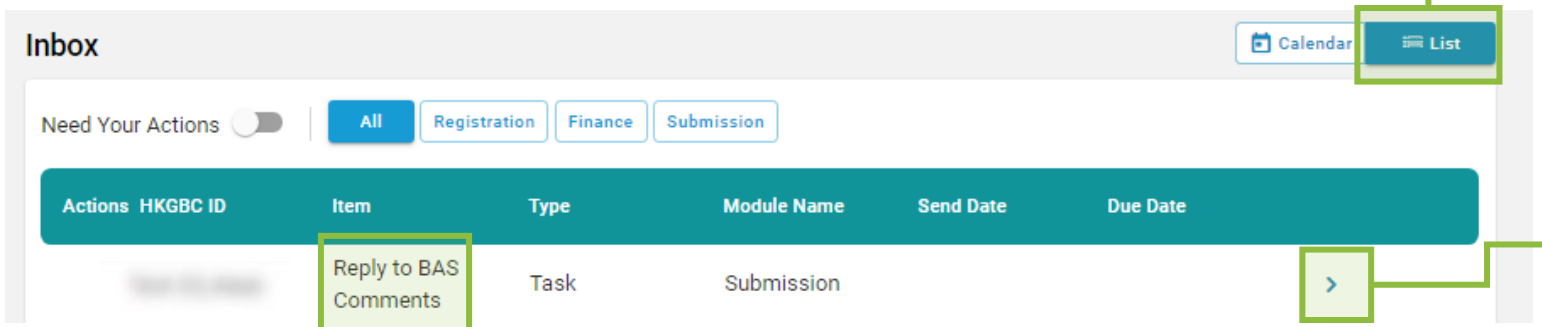
A5.6.1 Reply to BAS Comments

ALL



Step 1:
In the **Account Dashboard**, click **List** view under **Inbox**

Step 2:
Once BAS Comments have been issued, **Notification** will be shown in the **Inbox** requesting the Applicant to **Reply** to the comments. Click the link provided in the notification to access the project

Tips:

For items that require Applicants to respond to BAS Comments, the identity of **Reply to BAS Comments** will be shown under **Item**.

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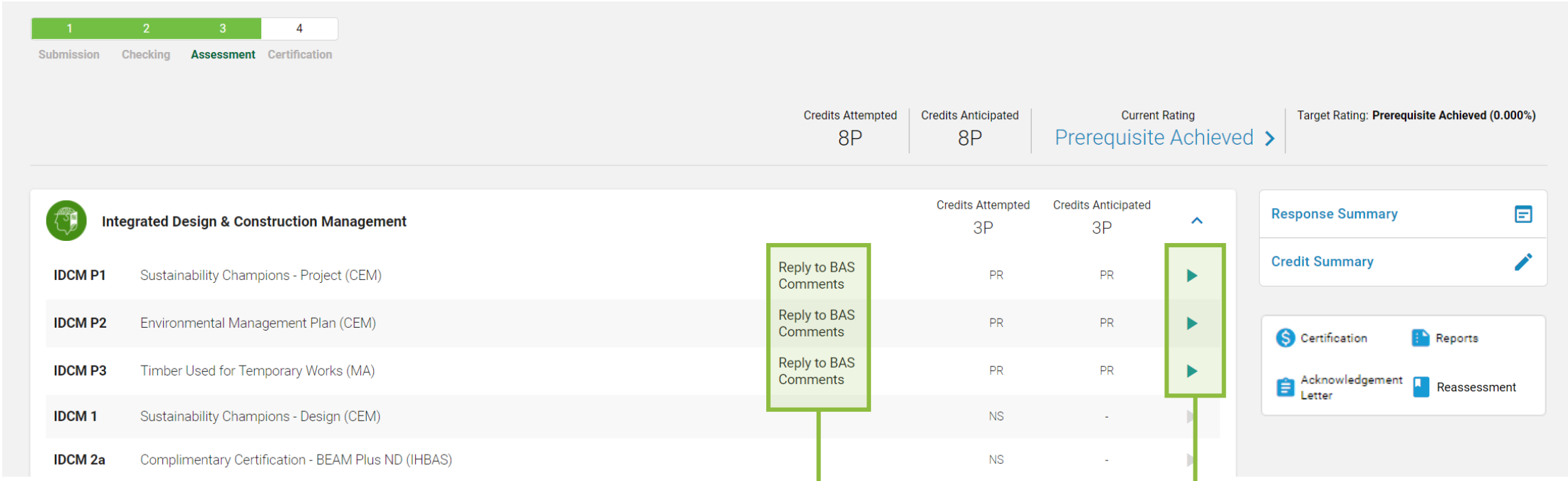
A5.6.2 Reply to BAS Comments



Tips:

For credits with BAS Comments issued, the identity of **Reply to BAS Comments** will be shown.

Step 3:
Back to the **Credit Summary Dashboard**,
Click ▶ to review the e-form

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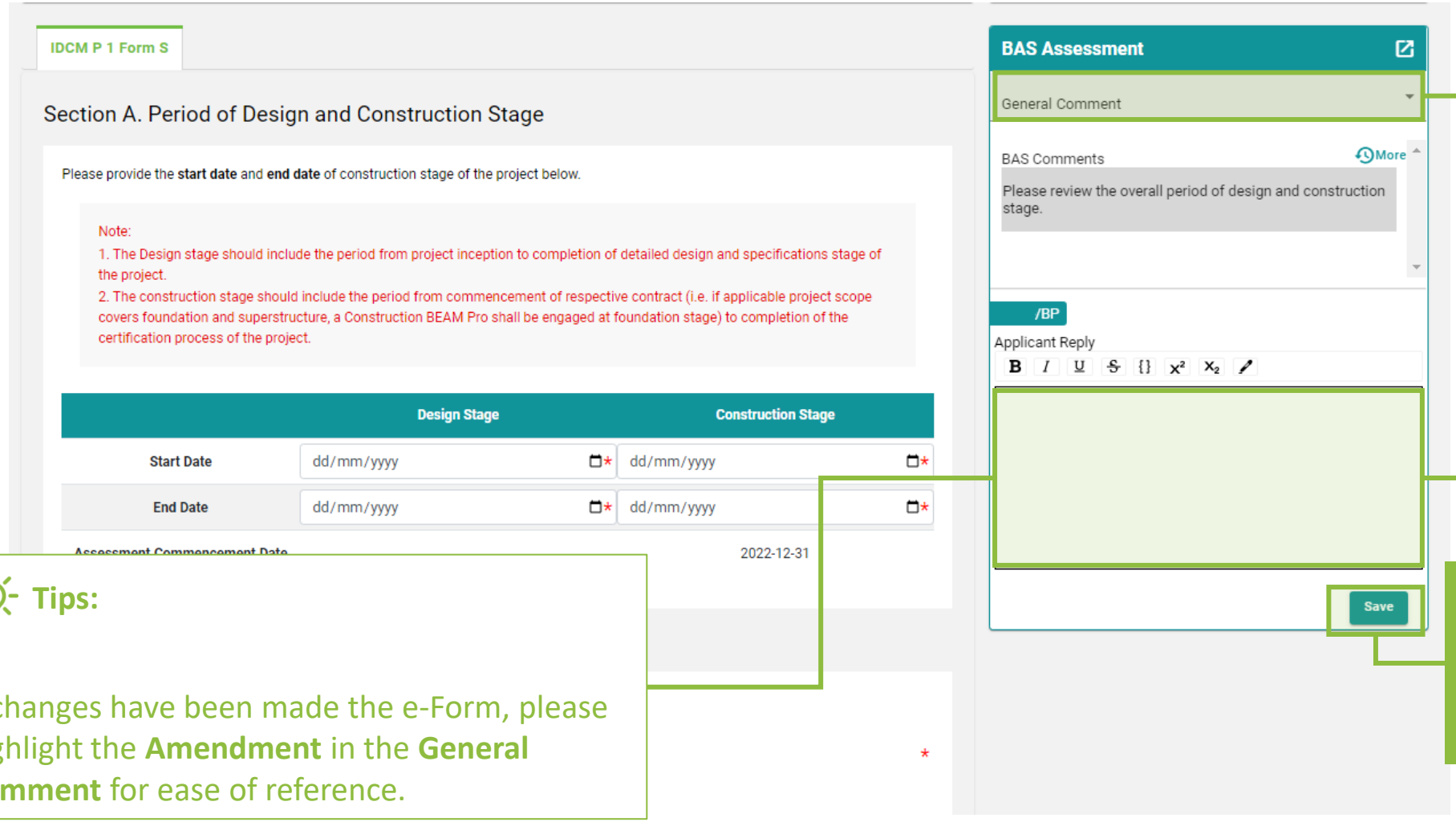
A5.6.3 Reply to BAS Comments



Step 4: Select **General Comment** to review the **General Comment** that the BAS issued on the e-Form

Step 5: If comment has been issued by the BAS, type the reply in the **Comment Box**

Step 6: Click **Save** to save the reply to the BAS Comments made in the **General Comment**

Tips:

If changes have been made the e-Form, please highlight the **Amendment** in the **General Comment** for ease of reference.

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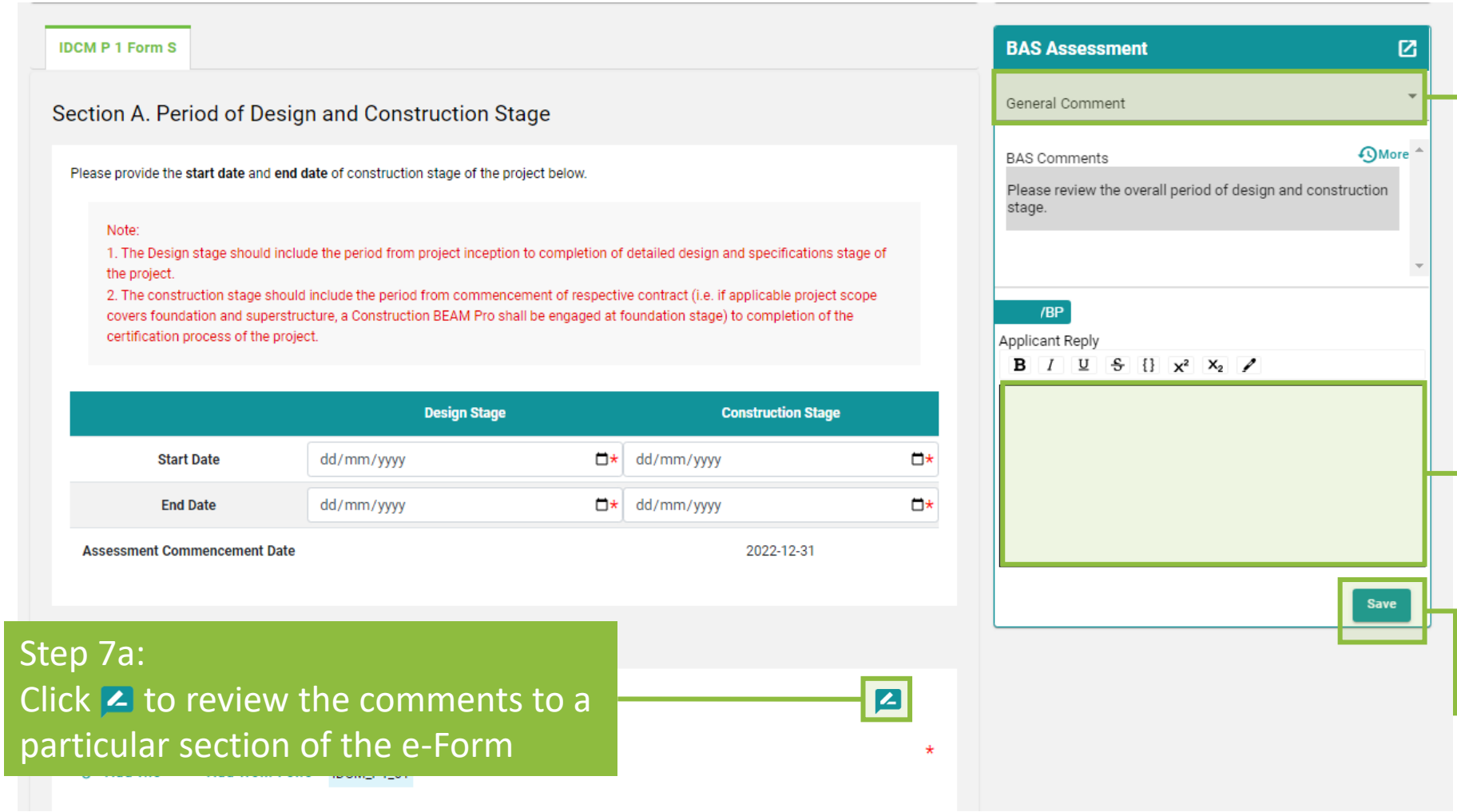
A5.6.4 Reply to BAS Comments

ALL



Step 7b (Optional):
Use the **Dropdown Menu** to navigate between the comment area of **Different Sections**

Step 8: If comment has been issued by the BAS, type the reply in the **Comment Box**

Step 9: Click **Save** to save the reply to the BAS Comments made for the section

Step 7a:
Click to review the comments to a particular section of the e-Form

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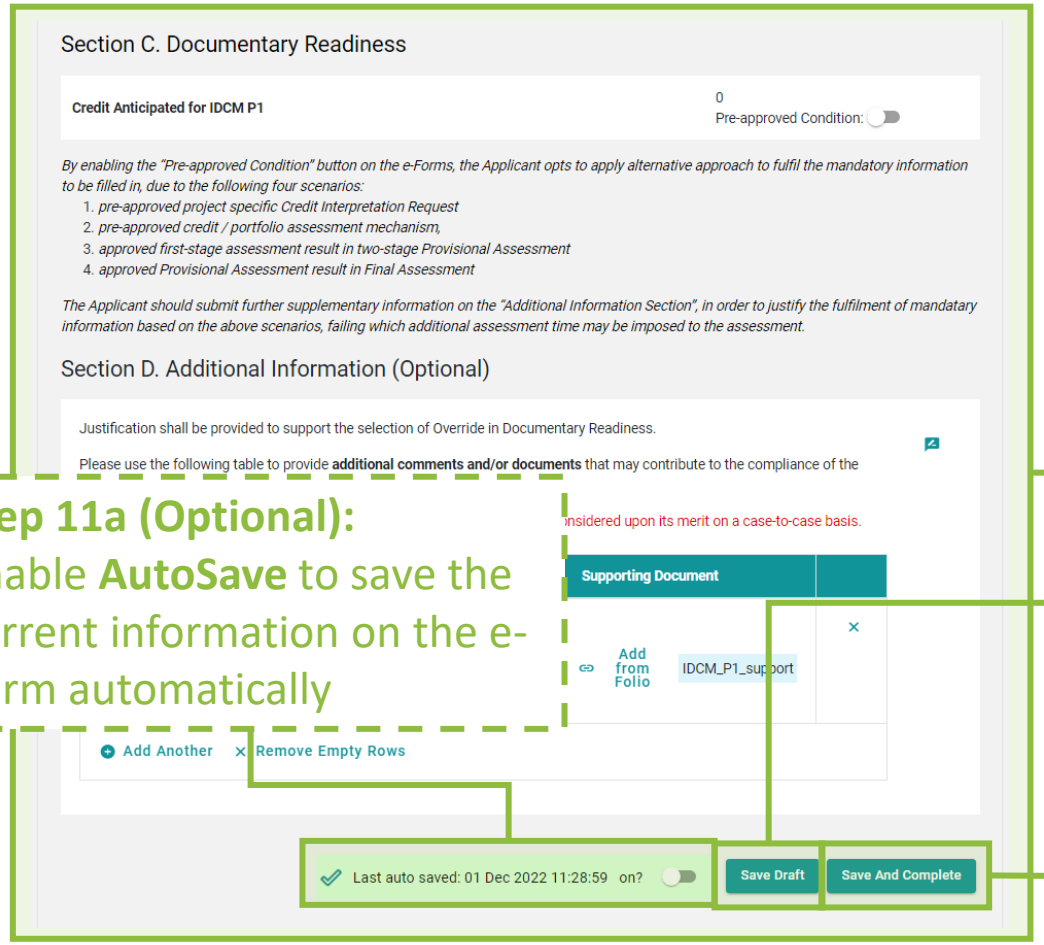
A5.6.5 Reply to BAS Comments



Step 10 (Optional):
Amend the **Information** provided on the e-Form

Step 11a (Optional):
Enable **AutoSave** to save the current information on the e-Form automatically

Step 11b (Optional):
Click **Save Draft** to save the current information on the e-Form for future editing

Step 11c: Click **Save and Complete** to save the information on the e-Form for assessment submission

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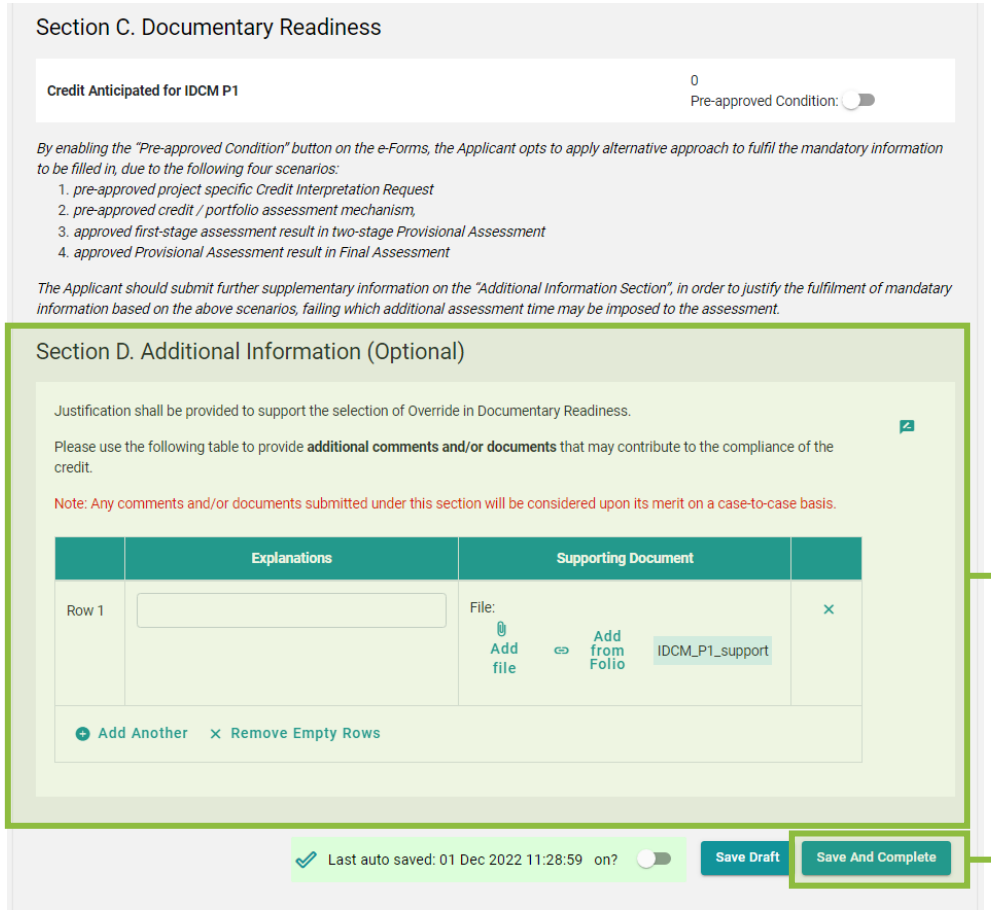
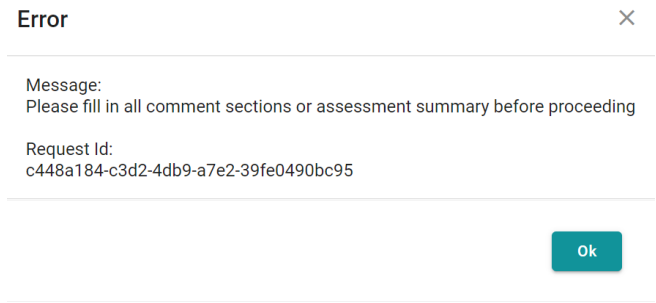
A5.6.6 Reply to BAS Comments

ALL



Tips:



1. The above **dialogue box** will pop up if the Applicant **Fails** to respond all BAS Comments issued. Please review all comments provided in the comment box and provide all necessary information on the e-Form.
2. If there are **CHANGES** made to the e-Form, the Applicant is suggested to specify the changes in the **Additional Information**.
3. If the form contains **Appendix**, please ensure each of the Appendix is saved before clicking the **Save and Complete** Button. The Appendix forms can be saved by clicking the **Save Draft** at the bottom of the e-Form.

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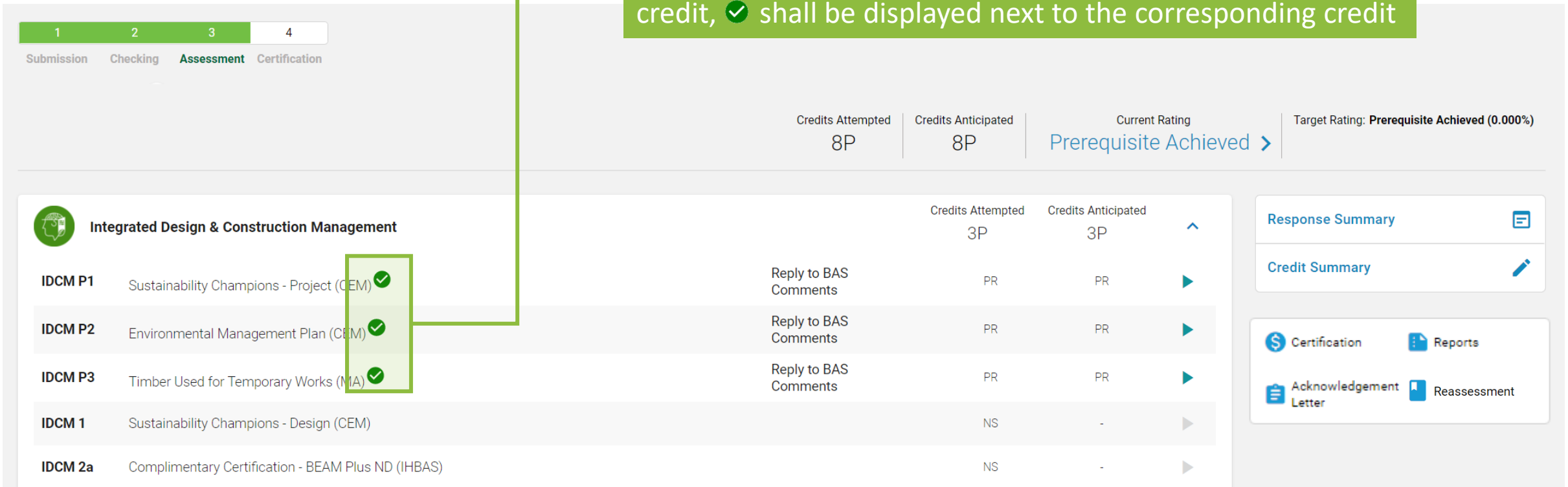
A5.6.7 Reply to BAS Comments

ALL

Step 12: Upon completing the review of the e-Form for the credit, ✅ shall be displayed next to the corresponding credit



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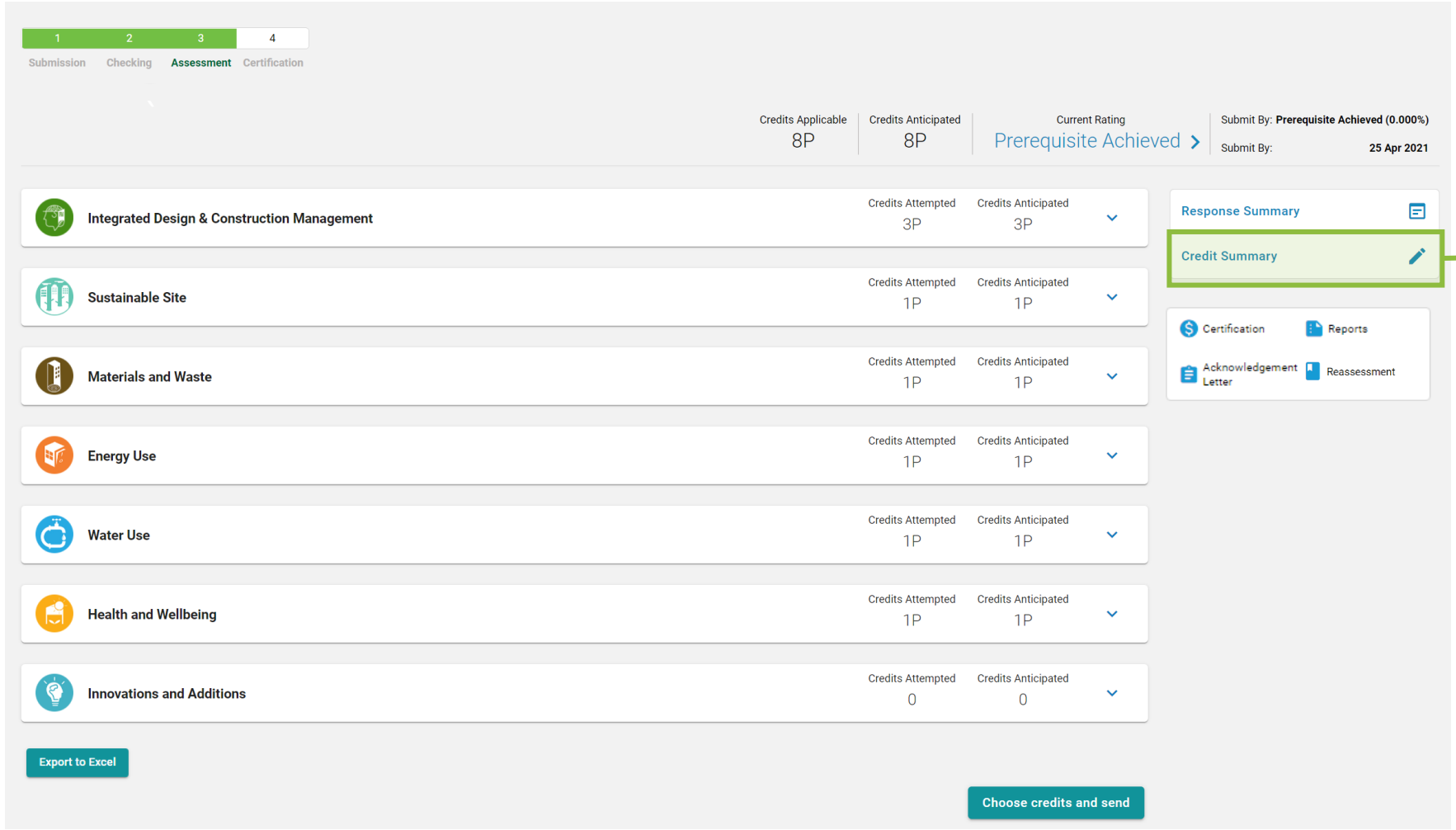
ALL

A5.6.8 Reply to BAS Comments



Step 13:
Click **Credit Summary** to review the information provided for the **General Information** and *where necessary*, amend the **Targeted Number of Credits**

➔ **Please proceed to Step 21a (Section A5.6.15) for** EBP 2.0 **projects**

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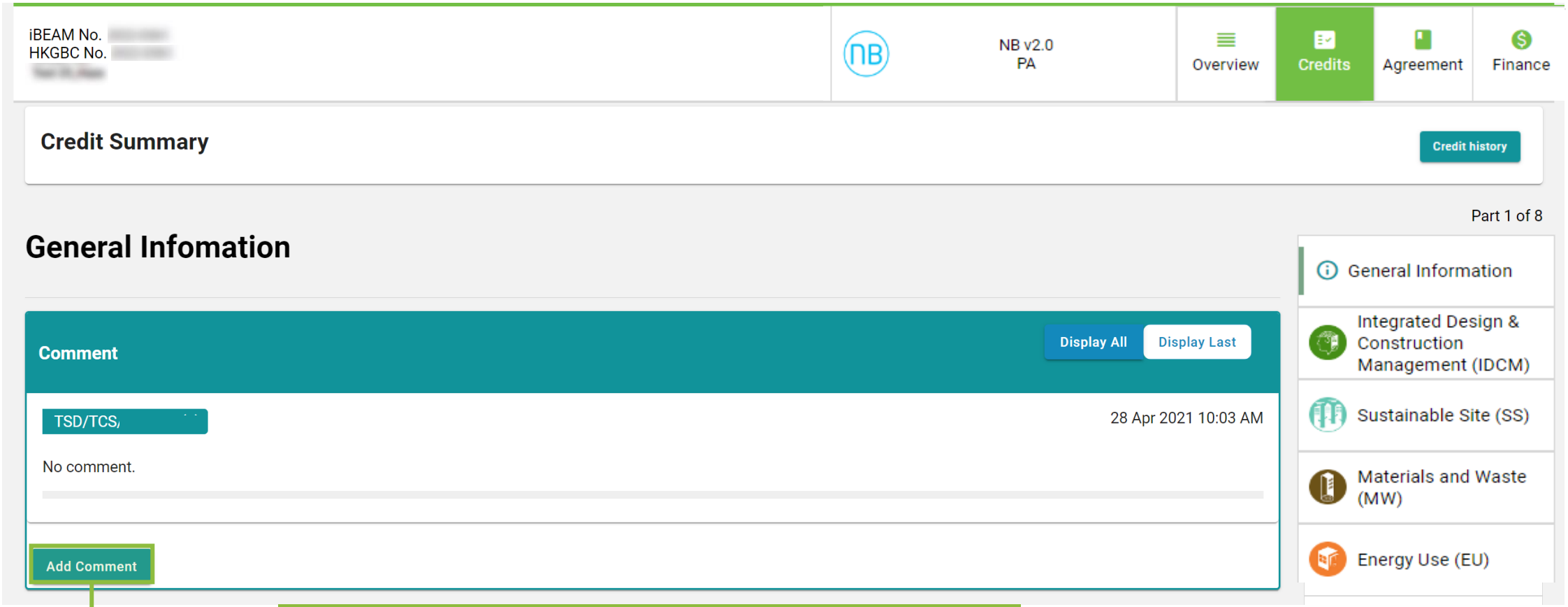
A5.6.9 Reply to BAS Comments



Step 14: *If comment is available*, click **Add Comment** to make a response to the comments issued

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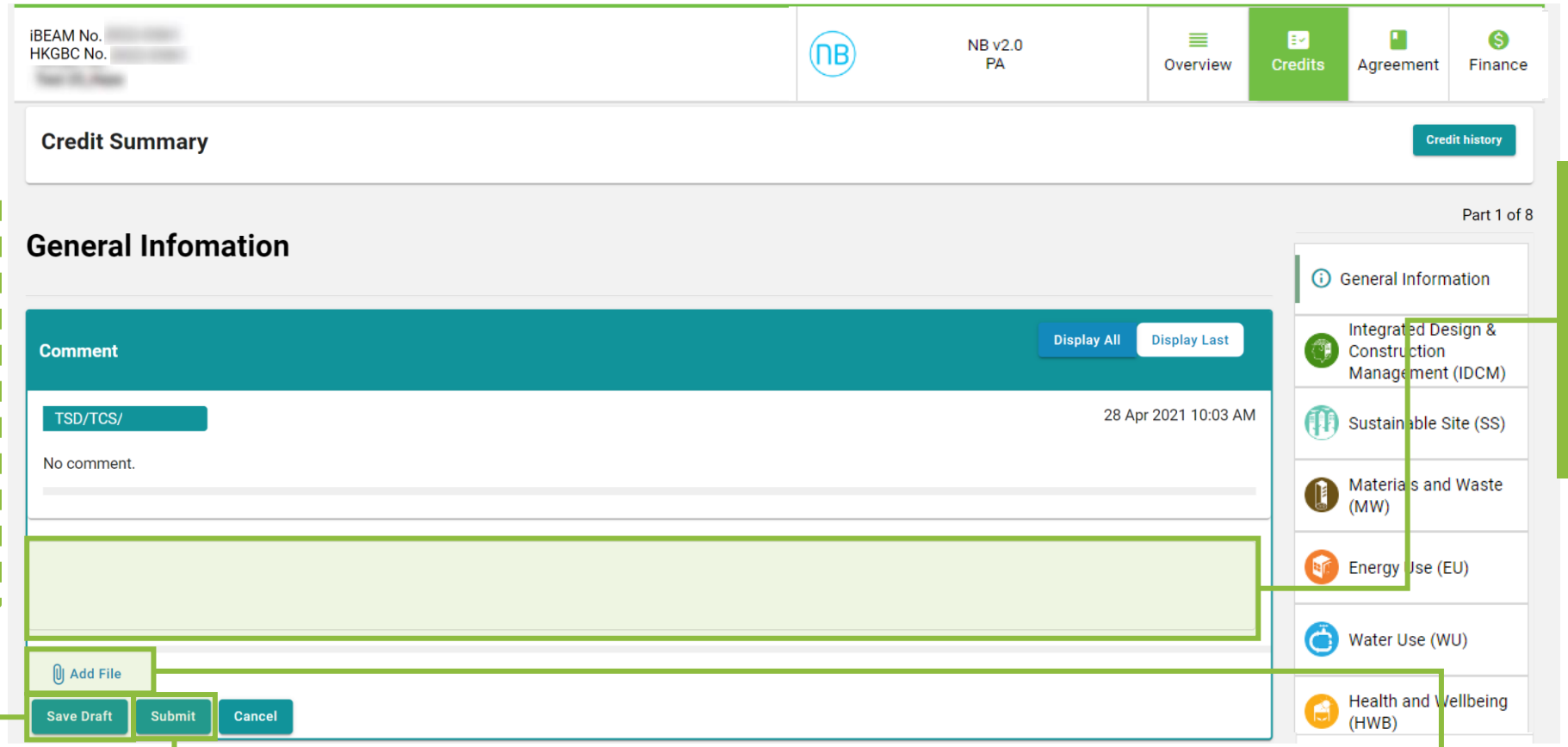
A5.6.10 Reply to BAS Comments



Step 17a (Optional): Click **Save Draft** to save the information made on the comment box for later editing

Step 15: Make the relevant reply to the comments in the **Comment** box

Step 17b: Click **Submit** to save the reply made to the General Information

Step 16 (Optional): **Add File** to support for the comment

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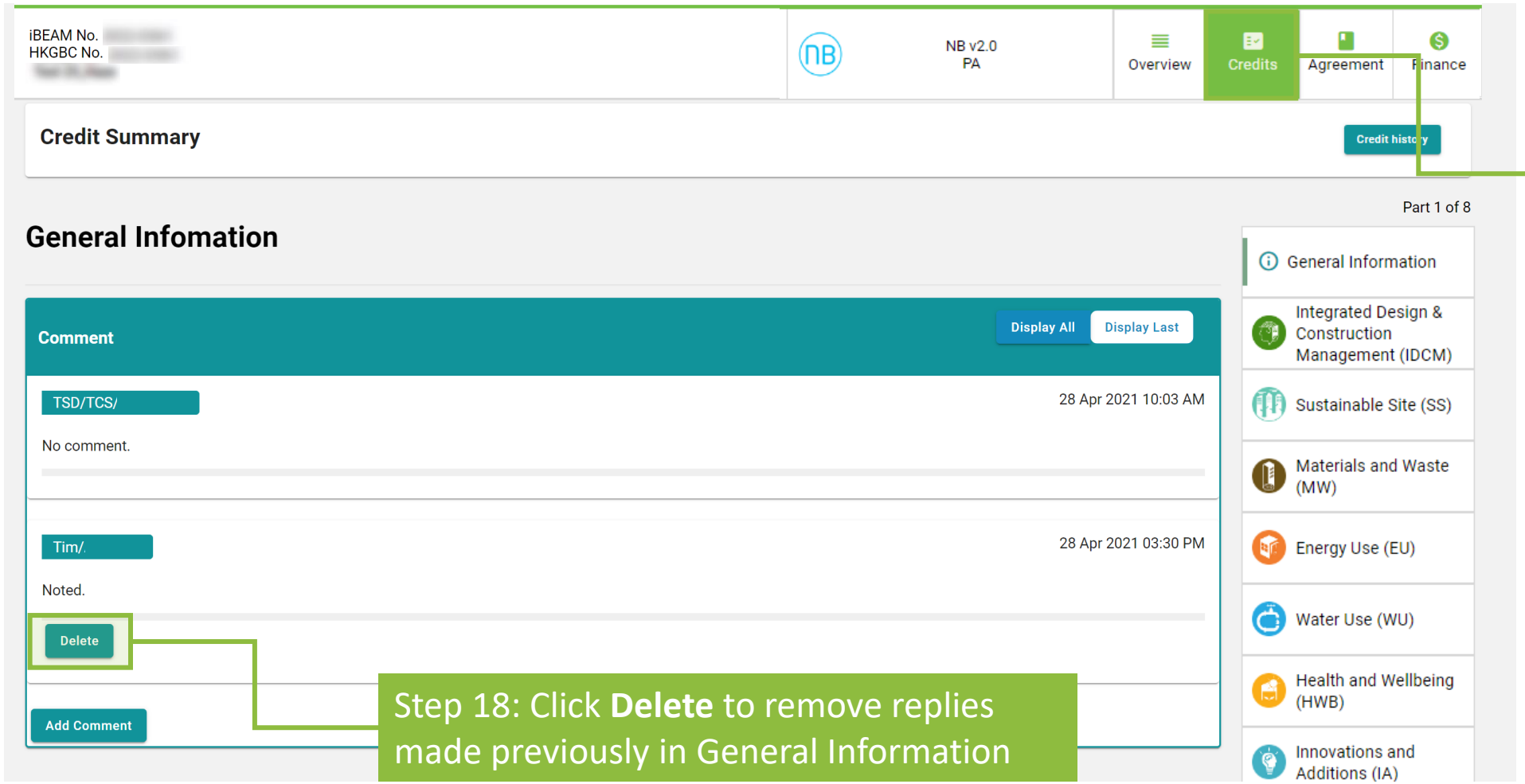
A5.6.11 Reply to BAS Comments



Step 19a: *If there are no other amendments needed for the Credit Summary,* click **Credits** to go back to the **Credit Summary Dashboard** and *proceed to Step 28*

Step 18: Click **Delete** to remove replies made previously in General Information

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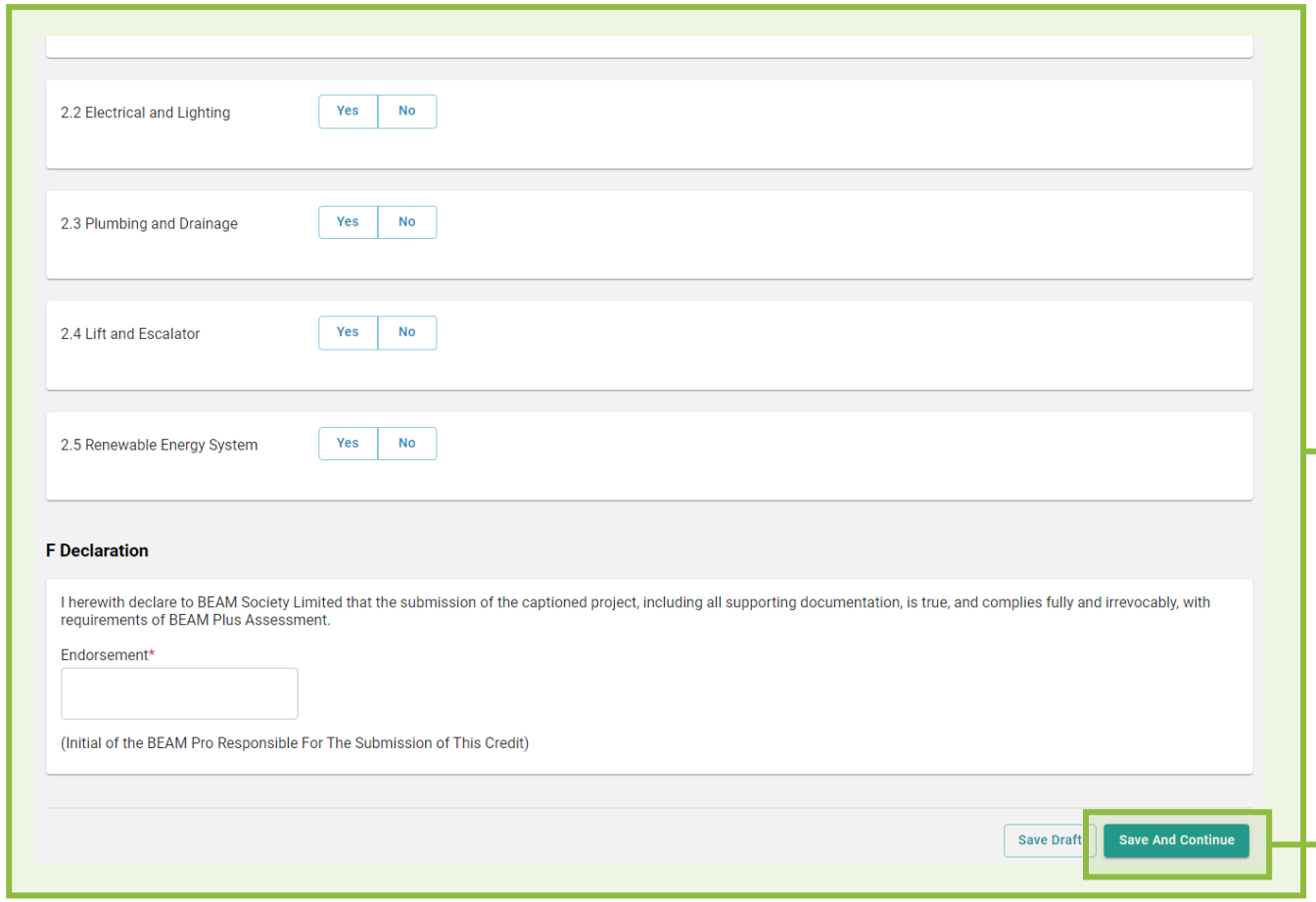
A5.6.12 Reply to BAS Comments

Follow the subsequent steps if *amendments are needed for the Credit Summary* after **Step 17**.



Step 19b (Optional):
Scroll down to amend information in the **General Information** page

Step 19c: Click **Save and Continue** to proceed entering information in individual Aspect

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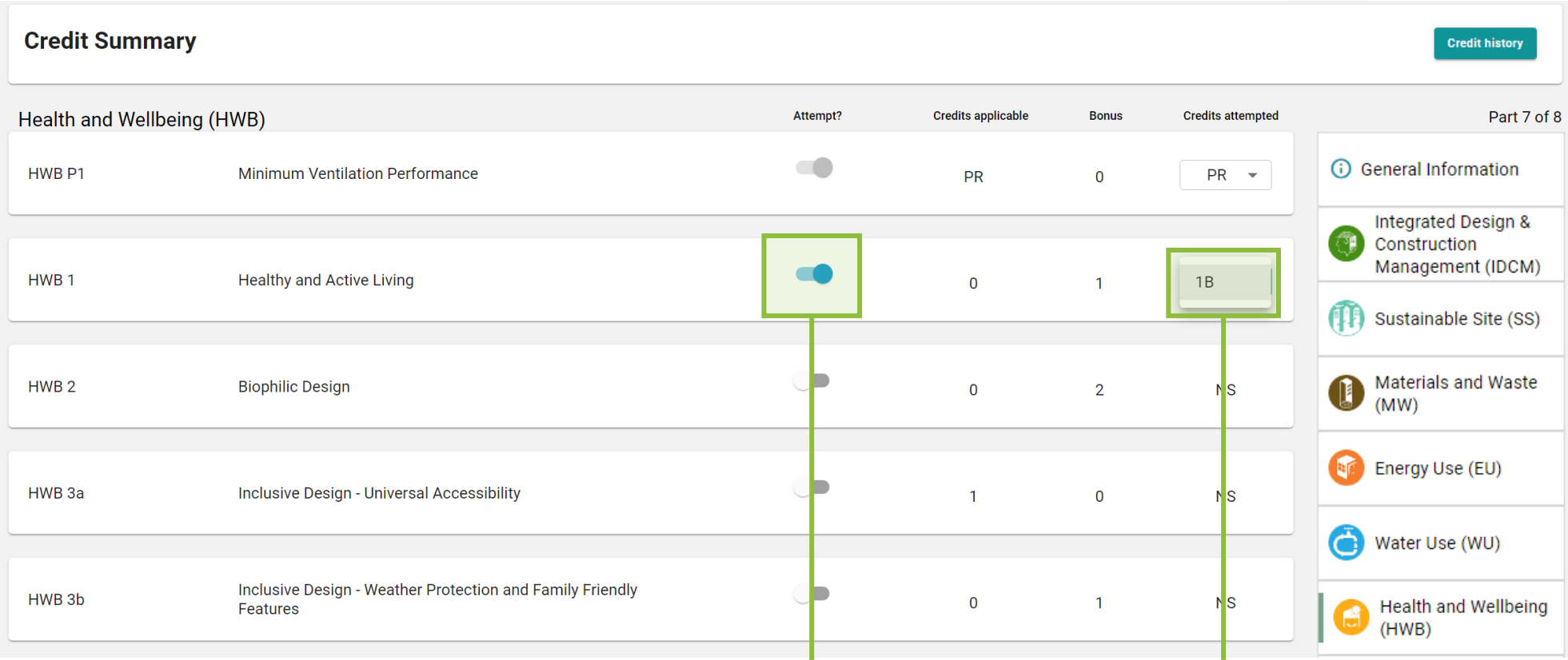
A5.6.13 Reply to BAS Comments



Step 21a (Optional):
Select **Attempt** for the newly attempted credits

Step 21b (Optional):
Select the **Credit Scoring** for the newly attempted credits

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A5.6.14 Reply to BAS Comments

HWB 10a	Artificial Lighting - Normally Occupied Spaces (IEQ)		1	0	NS
HWB 10b	Artificial Lighting - Not Normally Occupied Spaces and Unoccupied Spaces (IEQ)		1	0	NS
HWB 11	Daylight (IEQ)		0	2	NS
HWB 12	Biological Contamination (IEQ)		1	0	NS
		Total	**19**		**0+0B**

Save Continue

Tips:

iBEAM will direct back to the **Credit Summary Dashboard** when the **Continue** is clicked on the Innovation and Additions (IA) page.

Step 21b(i):
Click **Save** to save the information on the current Aspect

Step 21b(ii) (Optional):
Click **Continue** to proceed entering information in individual Aspect

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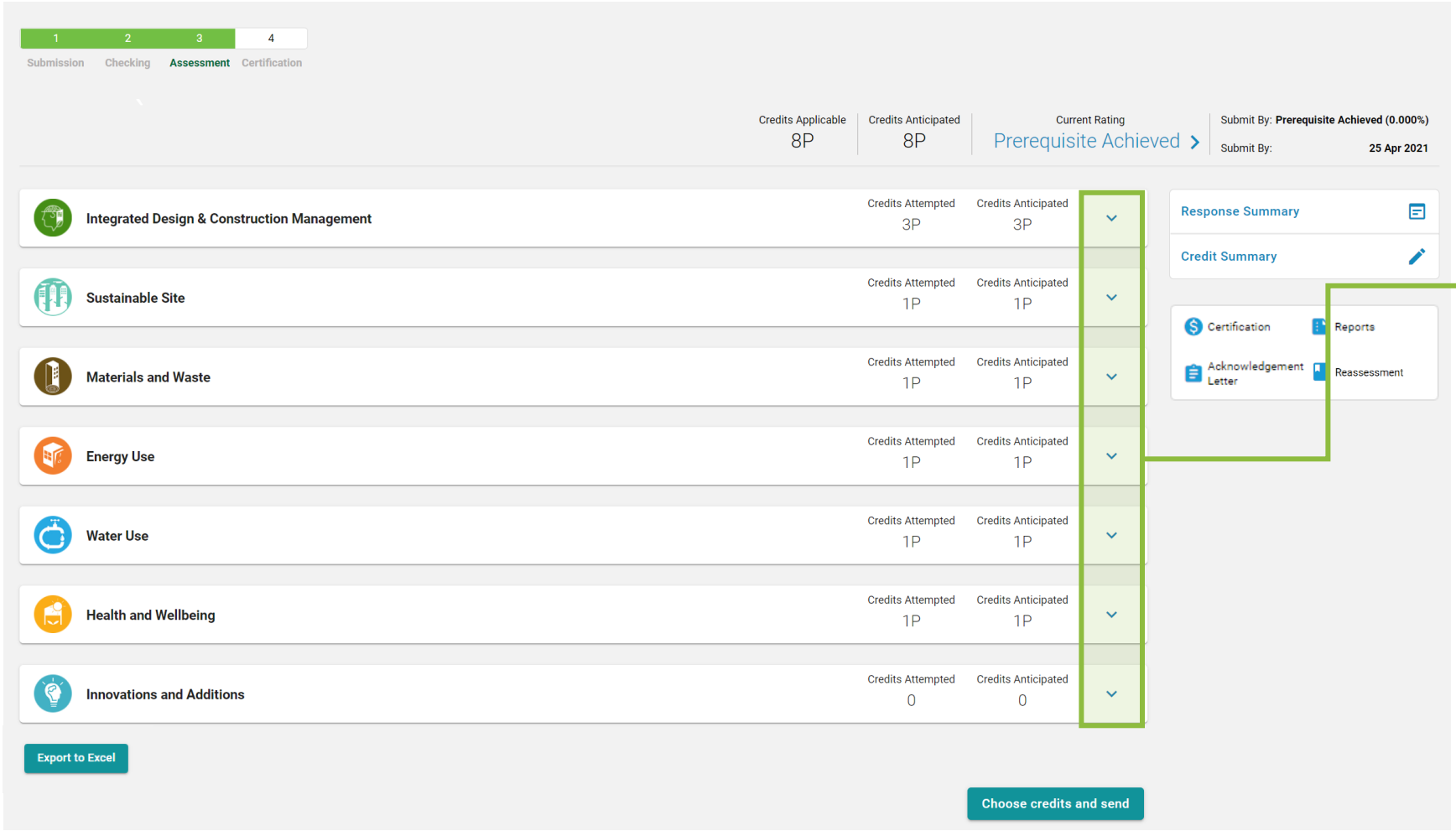
A5.6.15 Reply to BAS Comments



Step 22: At the **Credit Summary Dashboard**, Click ⌄ to access the detail credit information to each Aspect

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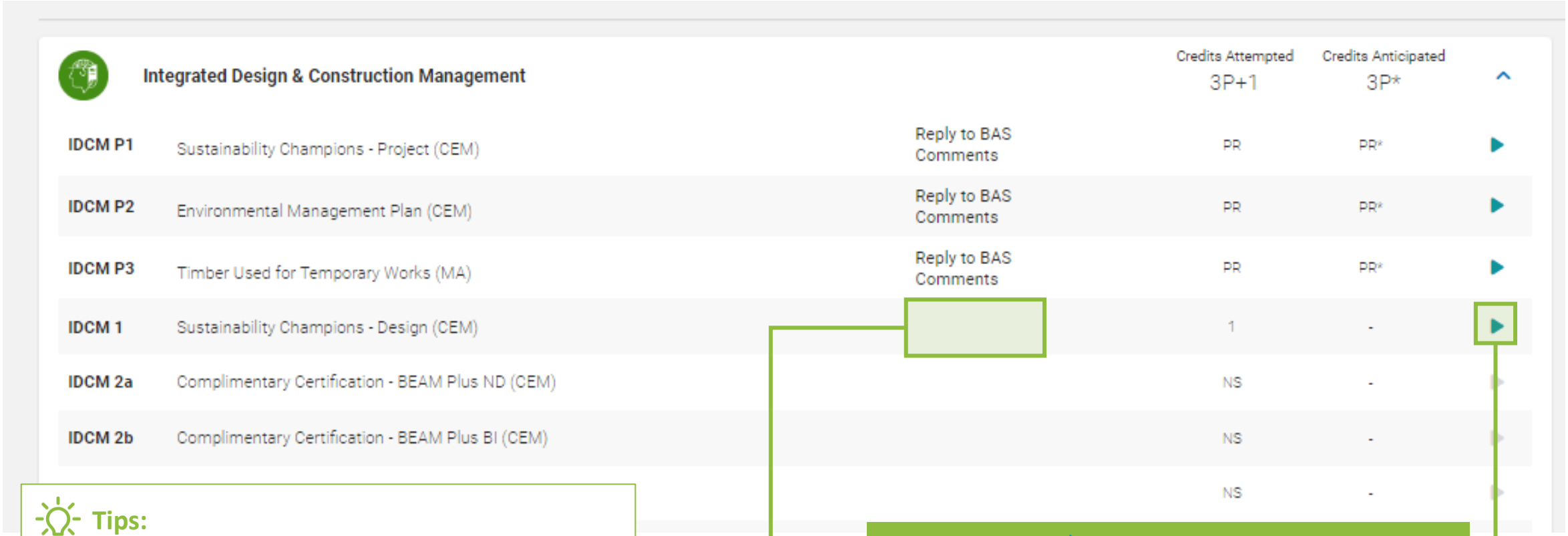
A5.6.16 Reply to BAS Comments



Tips:

For the newly attempted credits, there shall be no indicators displayed on the Credit Summary.

Step 23: Click ▶ to access and complete the e-Form of the newly attempted credits

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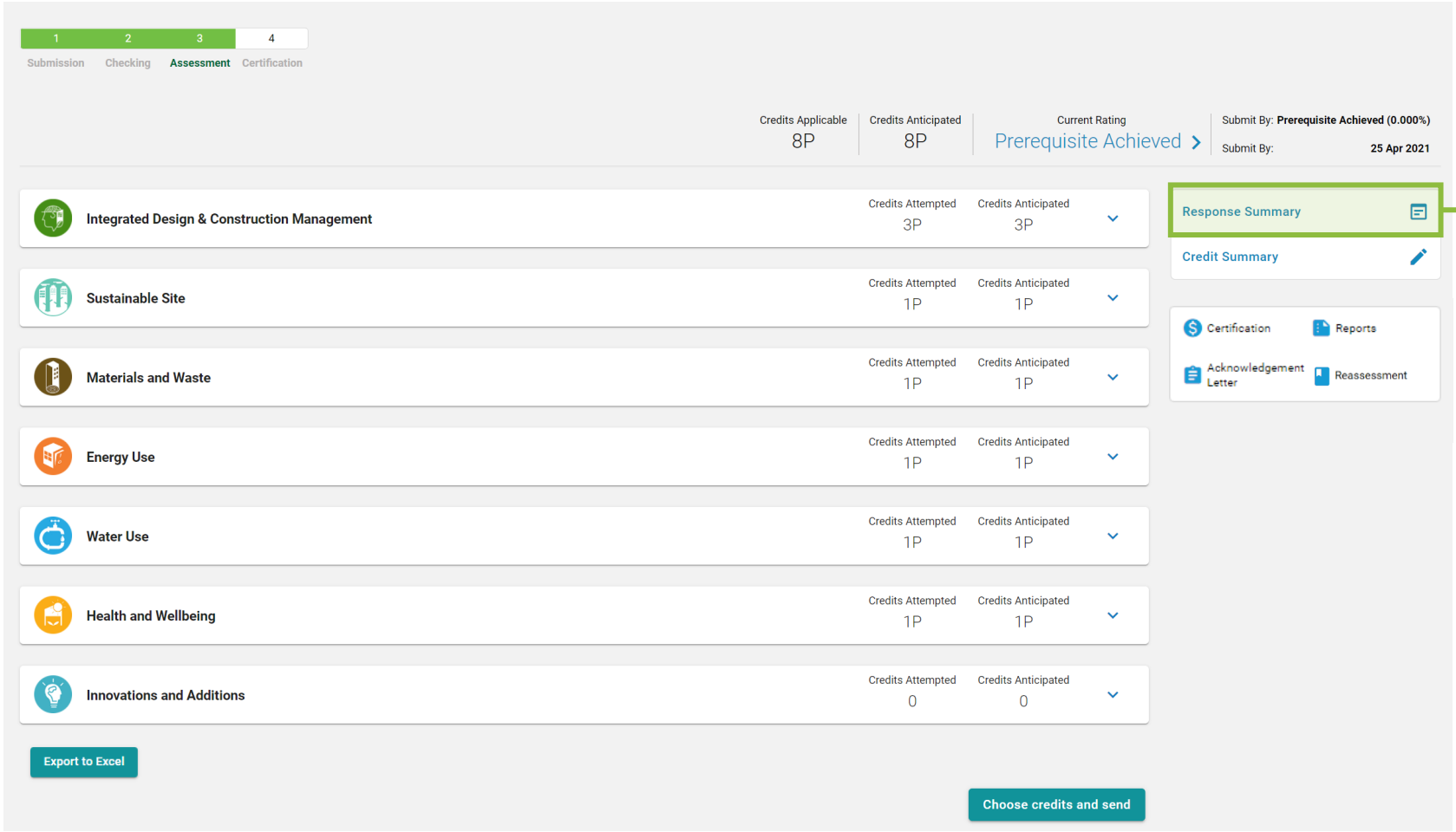
A5.6.17 Reply to BAS Comments



Step 24 (Optional):
Click **Response Summary** to view the summary of replies made to all submitted e-Forms

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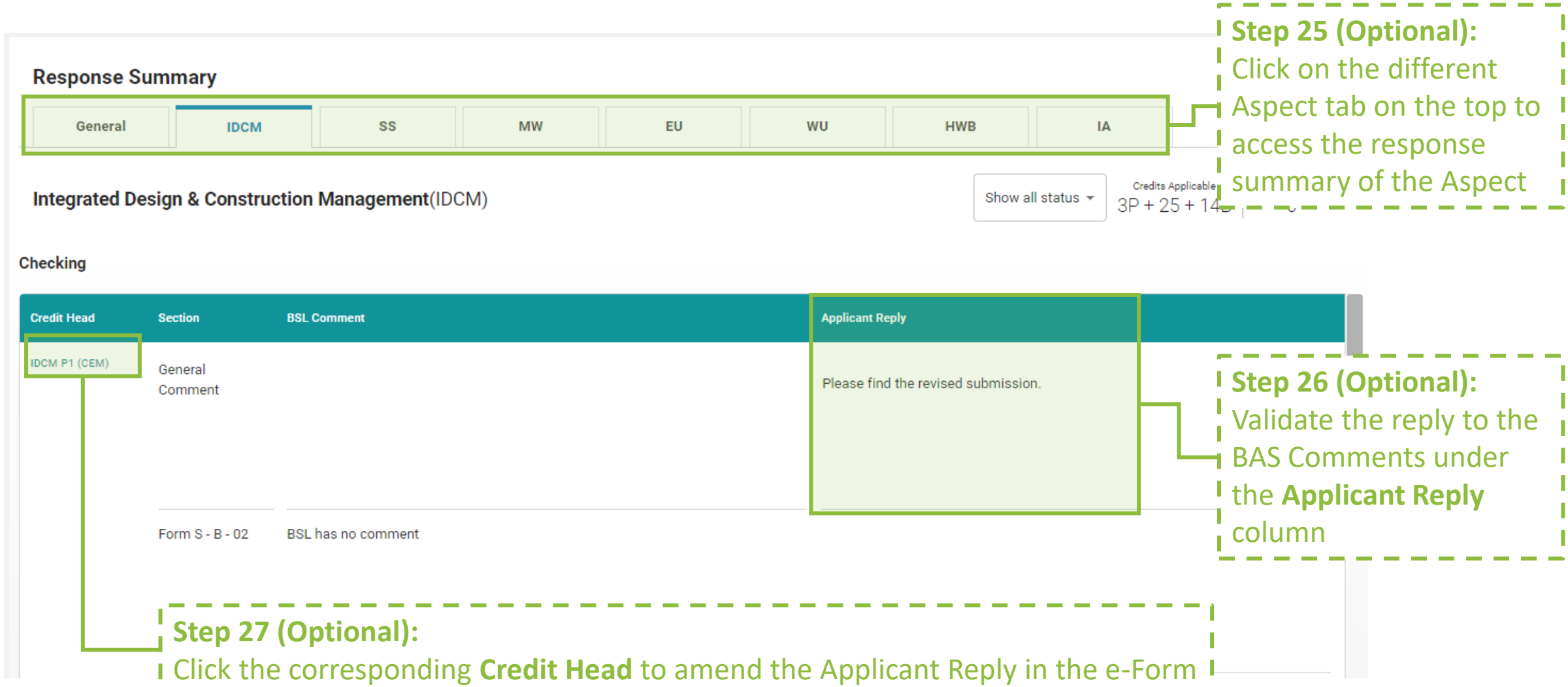
A5.6.18 Reply to BAS Comments



Step 25 (Optional):
Click on the different Aspect tab on the top to access the response summary of the Aspect

Step 26 (Optional):
Validate the reply to the BAS Comments under the **Applicant Reply** column

Step 27 (Optional):
Click the corresponding **Credit Head** to amend the Applicant Reply in the e-Form

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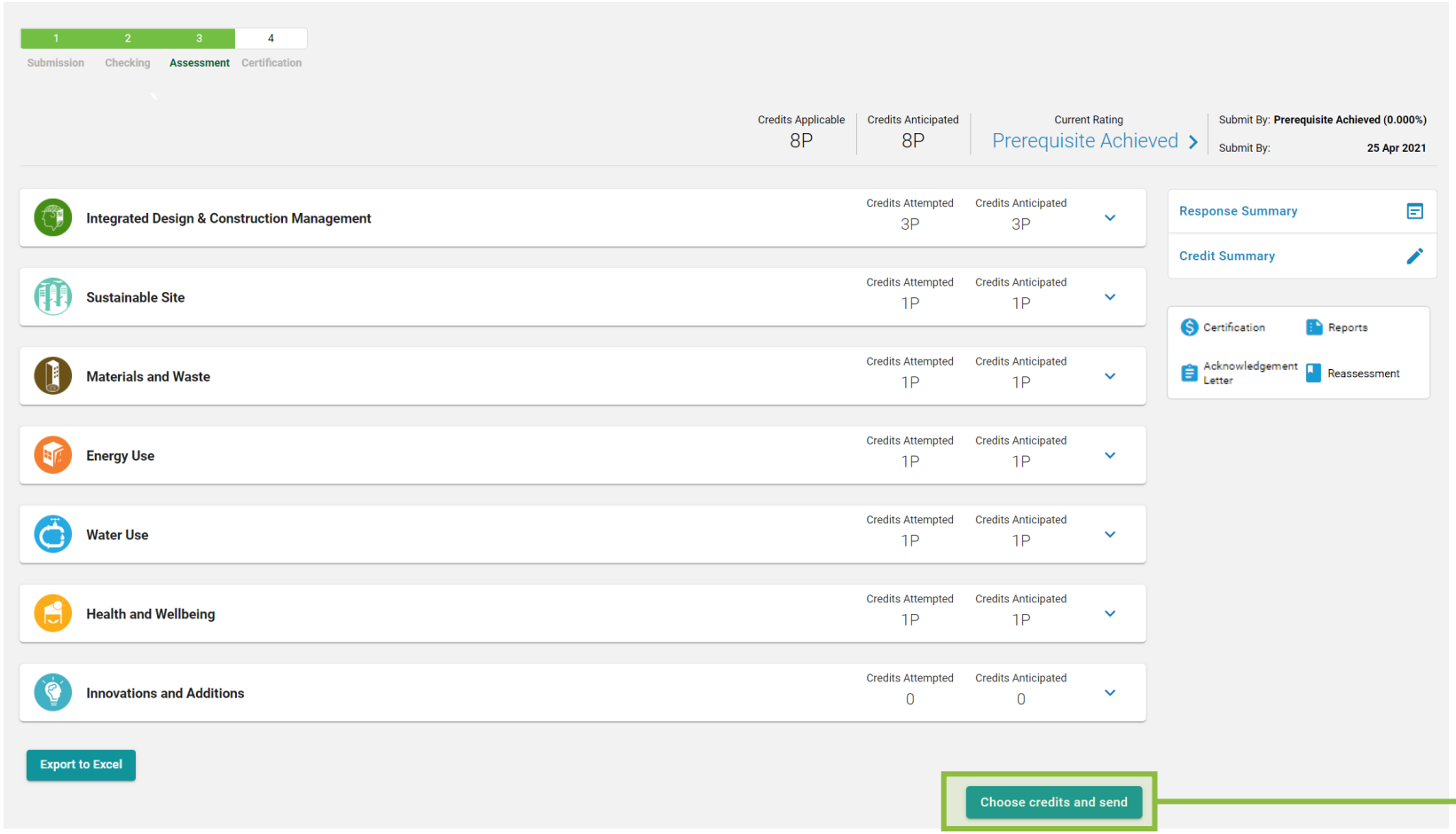
A5.6.19 Reply to BAS Comments

ALL



Step 28: Back to the Credit Summary Dashboard, click **Choose Credits and Send** to complete making a reply to the BAS Comments and submitting the revised submission for assessment

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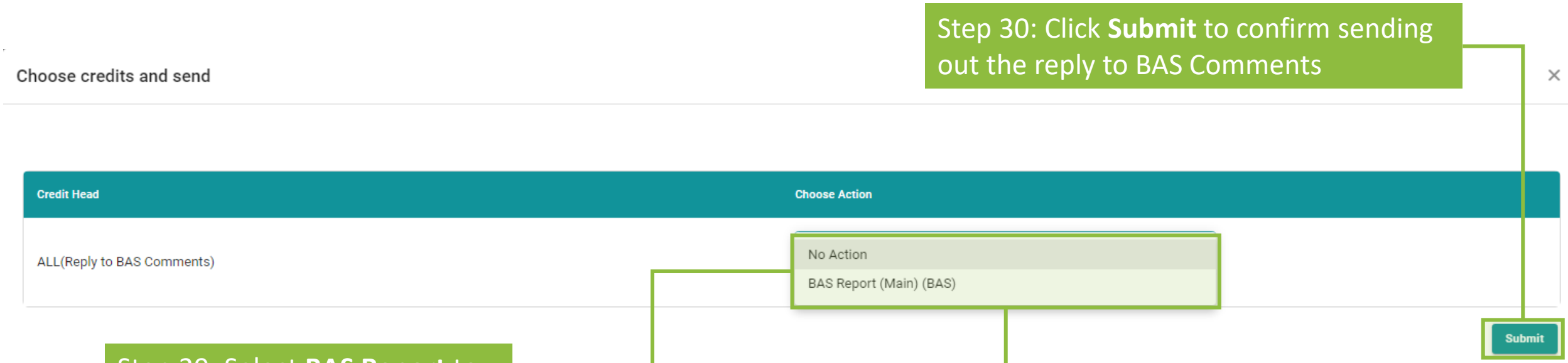
A5.6.20 Reply to BAS Comments

ALL



Step 30: Click **Submit** to confirm sending out the reply to BAS Comments

Step 29: Select **BAS Report** to instruct iBEAM to send out the reply to BAS Comments

Tips:

BAS Report option will only be shown if the comments to the e-Form have been **properly completed for all submitted credits under that Aspect**.

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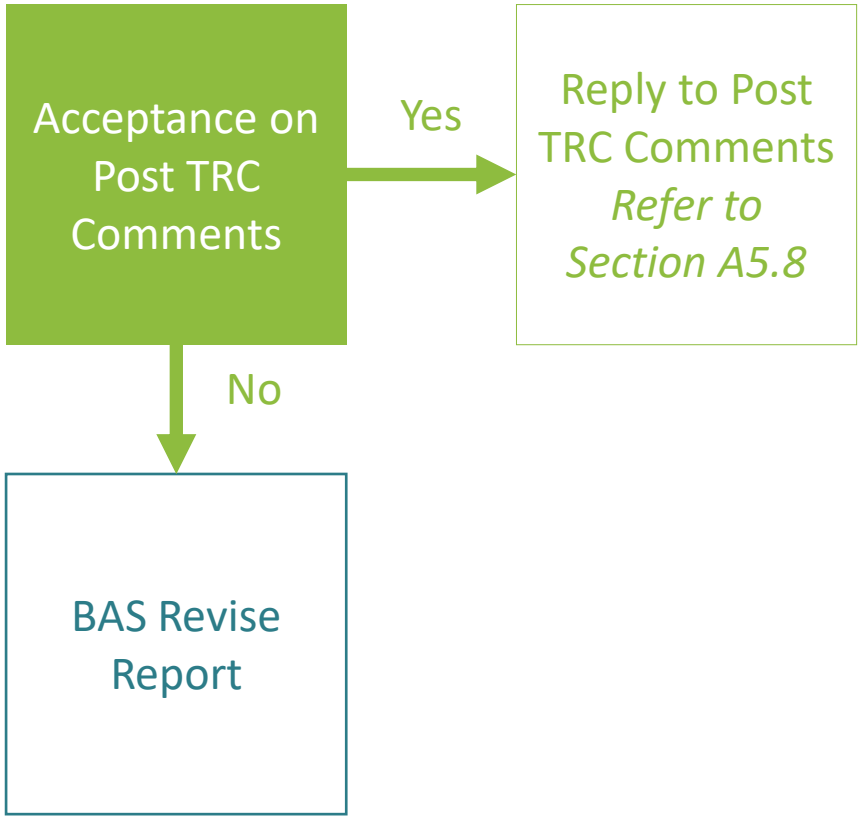
A5.7 Acceptance on Post TRC Comments

Process Overview



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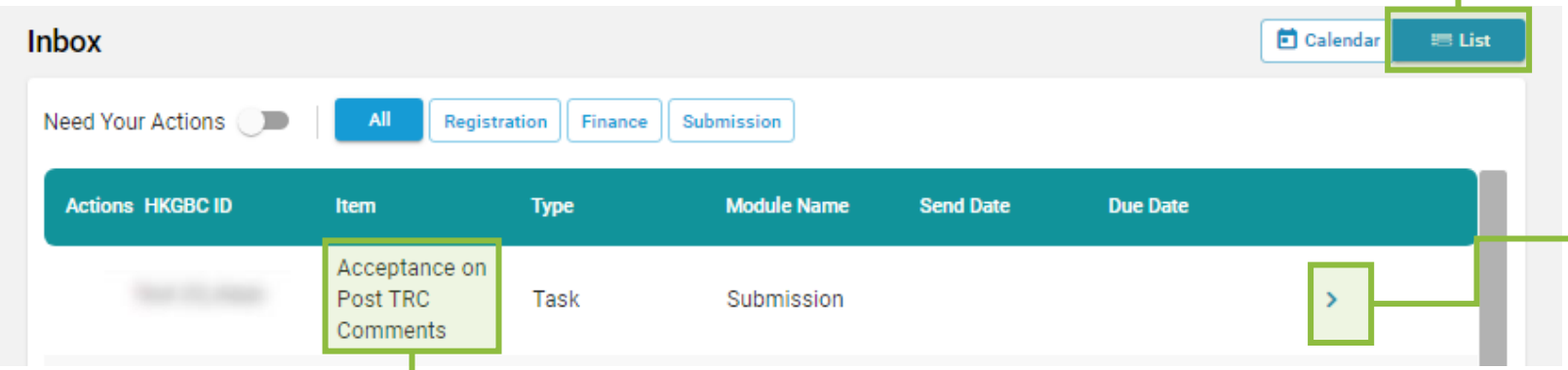
A5.7.1 Acceptance on Post TRC Comments

ALL



Step 1:
In the **Account Dashboard**, click **List** view under **Inbox**

Step 2:
Once the project is granted with a Post TRC Comments, **Notification** will be shown in the **Inbox** requesting the Applicant to make an **Acceptance** on Post TRC Comments. Click the link provided in the notification to access the project

Tips:

For items that require Applicant to accept Post TRC Comments, the identity of **Acceptance on Post TRC Comments** will be shown under **Item**.

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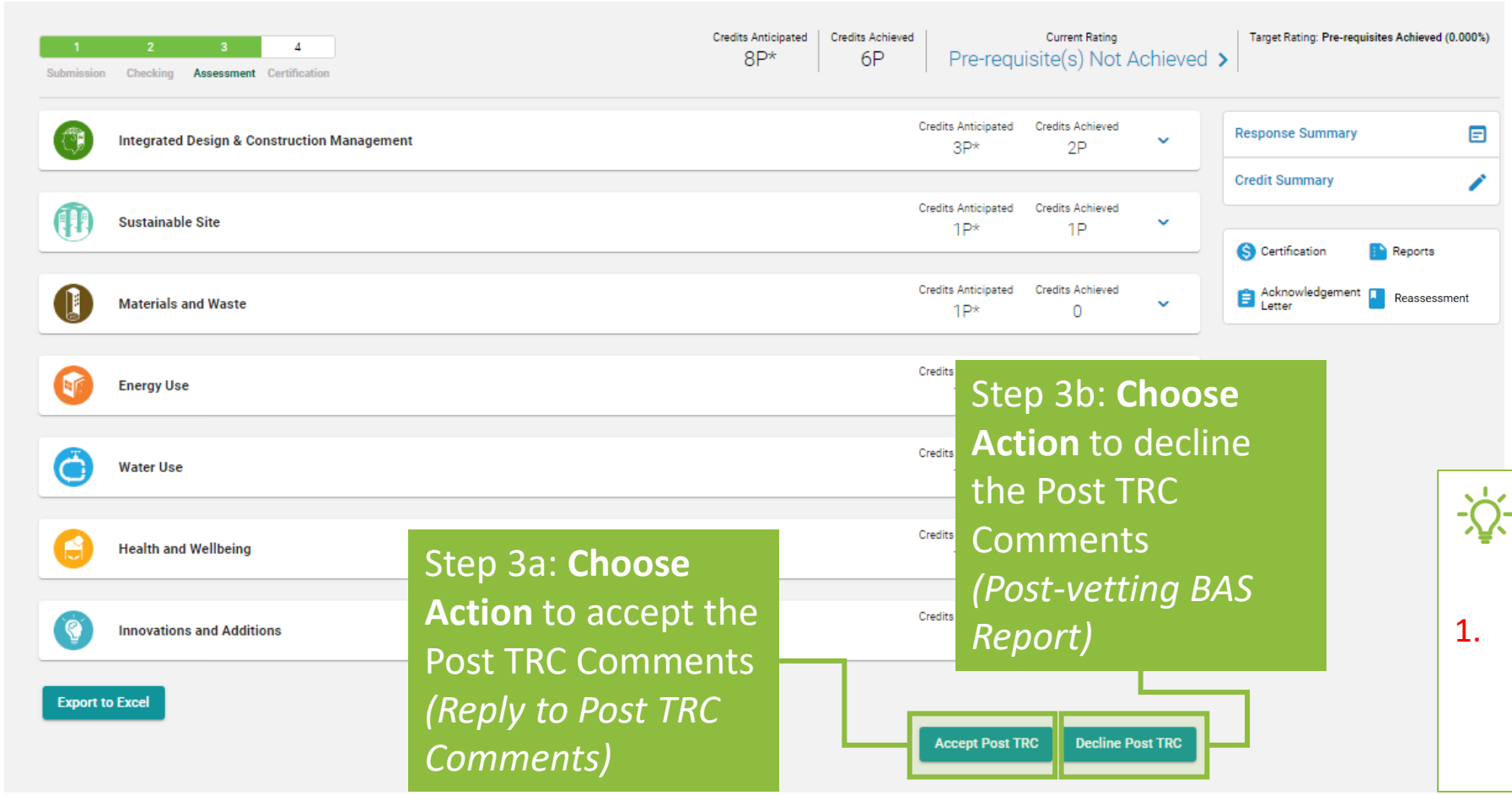
A5.7.2 Acceptance on Post TRC Comments

ALL



Step 3a: **Choose Action** to accept the Post TRC Comments *(Reply to Post TRC Comments)*

Step 3b: **Choose Action** to decline the Post TRC Comments *(Post-vetting BAS Report)*

Tips:

1. Please make the selection of **Accept / Decline Post TRC** with **EXTREME CAUTION** as this will affect on how the project is assessed.

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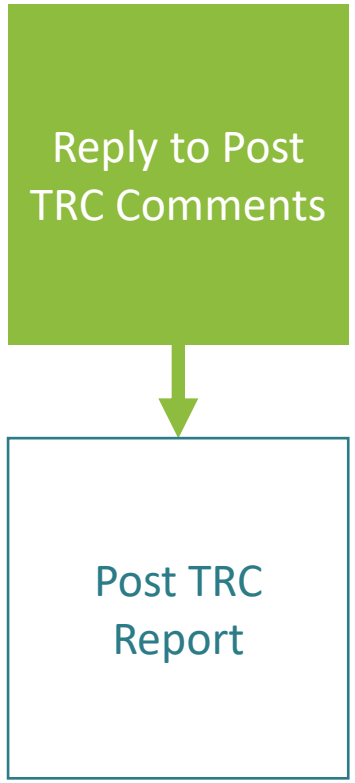
A5.8 Reply to Post TRC Comments

Process Overview



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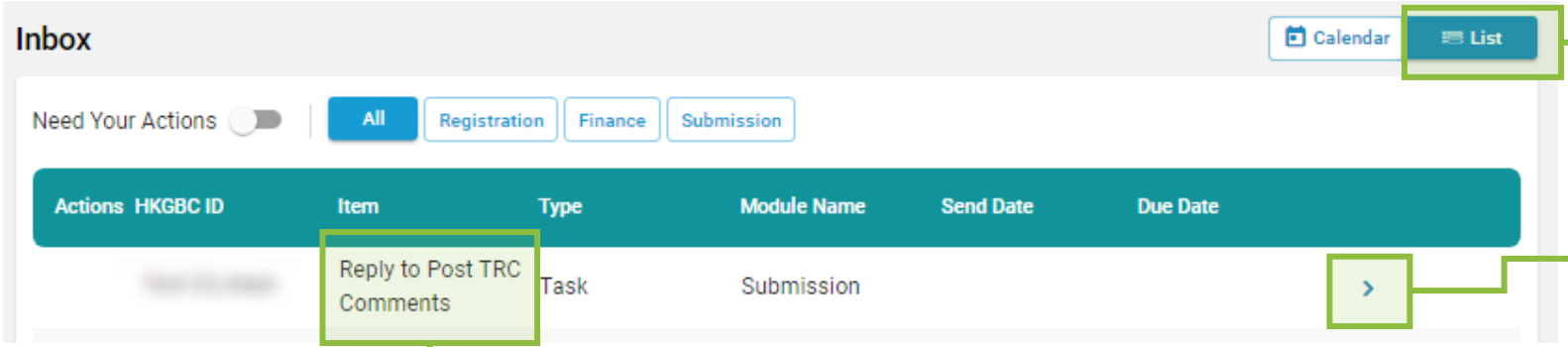
A5.8.1 Reply to Post TRC Comments

ALL



Step 1:
In the **Account Dashboard**, click **List** view under **Inbox**

Step 2:
Once Post TRC Comments have been accepted, **Notification** will be shown in the **Inbox** requesting the Applicant to **Reply** to the comments. Click the link provided in the notification to access the project

Tips:

For items that require Applicants to respond to Post TRC Comments, the identity of **Reply to Post TRC Comments** will be shown under **Item**.

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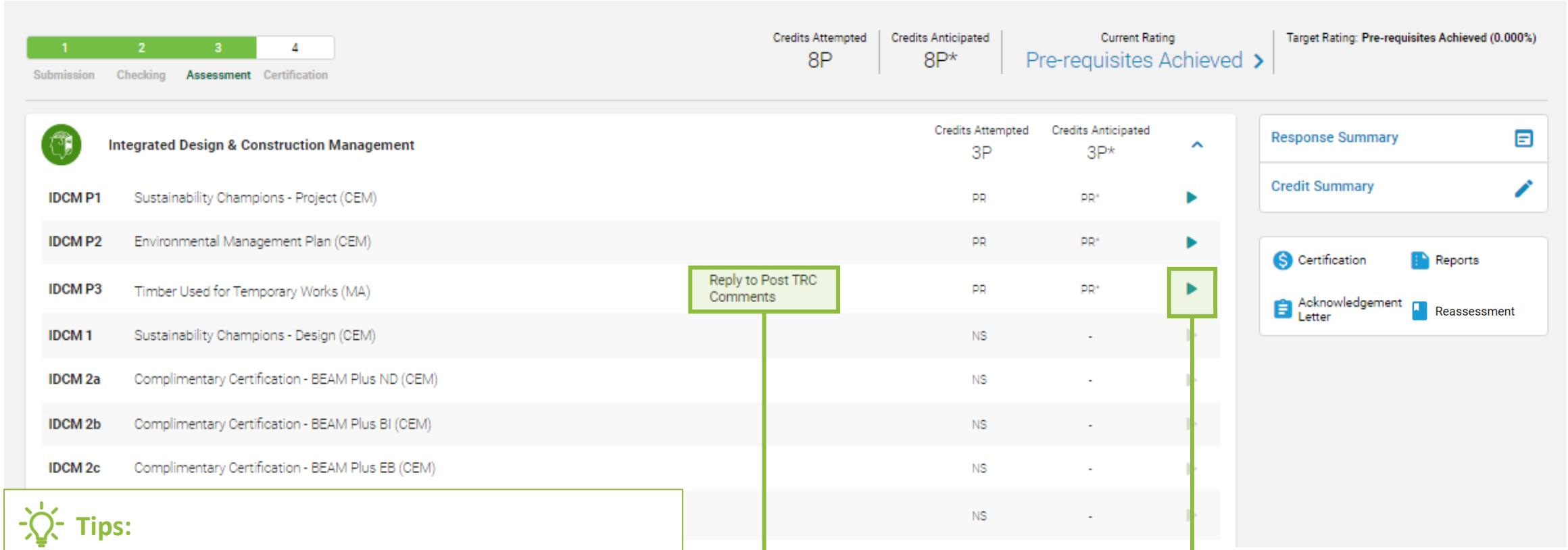
ALL

A5.8.2 Reply to Post TRC Comments



Tips:

For credits with Post TRC Comments issued, the identity of **Reply to Post TRC Comments** will be shown.

Step 3:
Click ▶ to review the e-form

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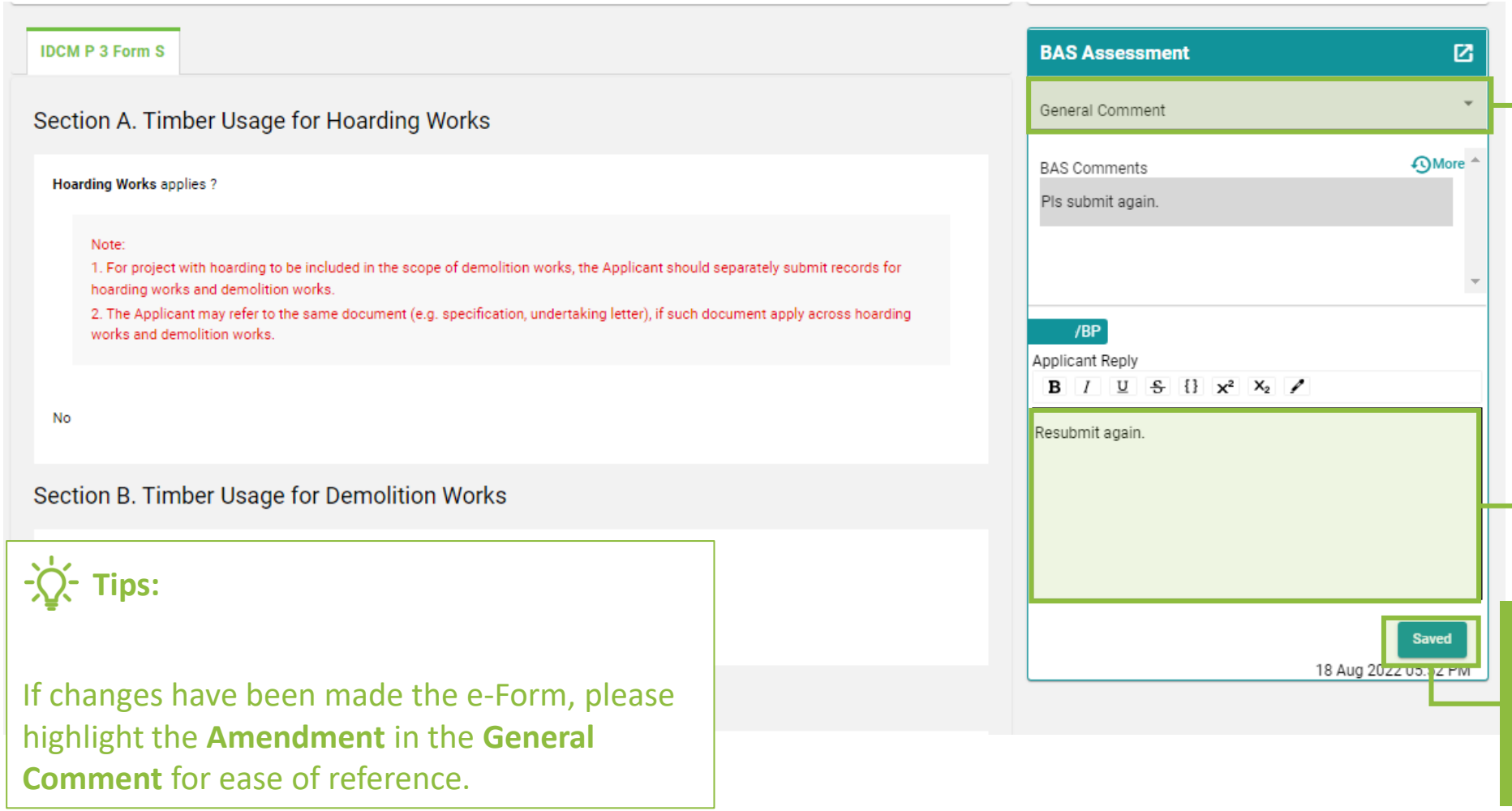
A5.8.3 Reply to Post TRC Comments



Step 4: Select **General Comment** to review the **General Comment** issued for the Post TRC Comments

Step 5: If comment has been issued, type the reply in the **Comment Box**

Step 6: Click **Save** to save the reply to the Post TRC Comments made in the **General Comment**

Tips:

If changes have been made the e-Form, please highlight the **Amendment** in the **General Comment** for ease of reference.

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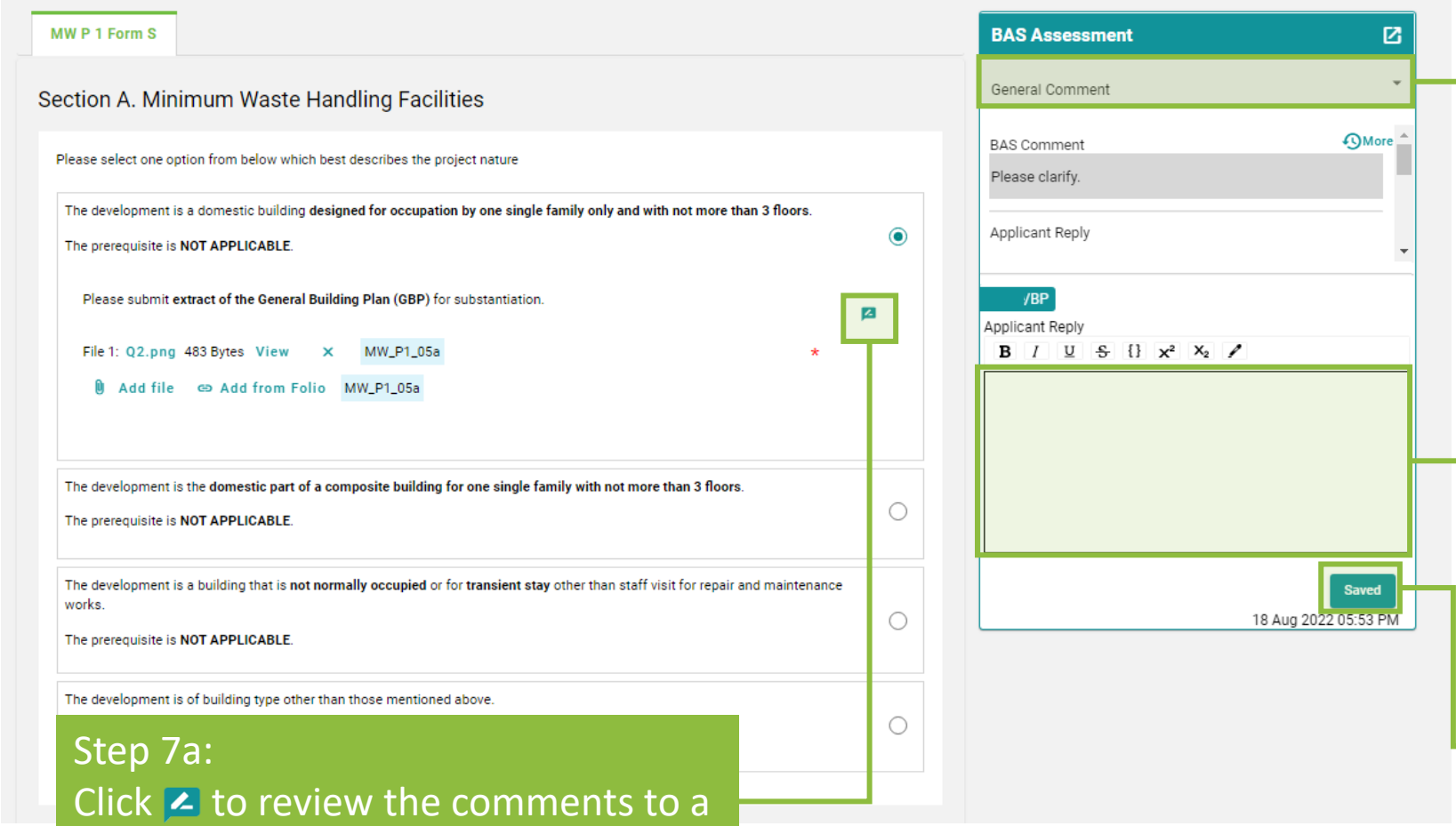
A5.8.4 Reply to Post TRC Comments



Step 7a:
Click to review the comments to a particular section of the e-Form

Step 7b (Optional):
Use the **Dropdown Menu** to navigate between the comment area of **Different Sections**

Step 8: If comment has been issued, type the reply in the **Comment Box**

Step 9: Click **Save** to save the reply to the Post TRC Comments made for the section

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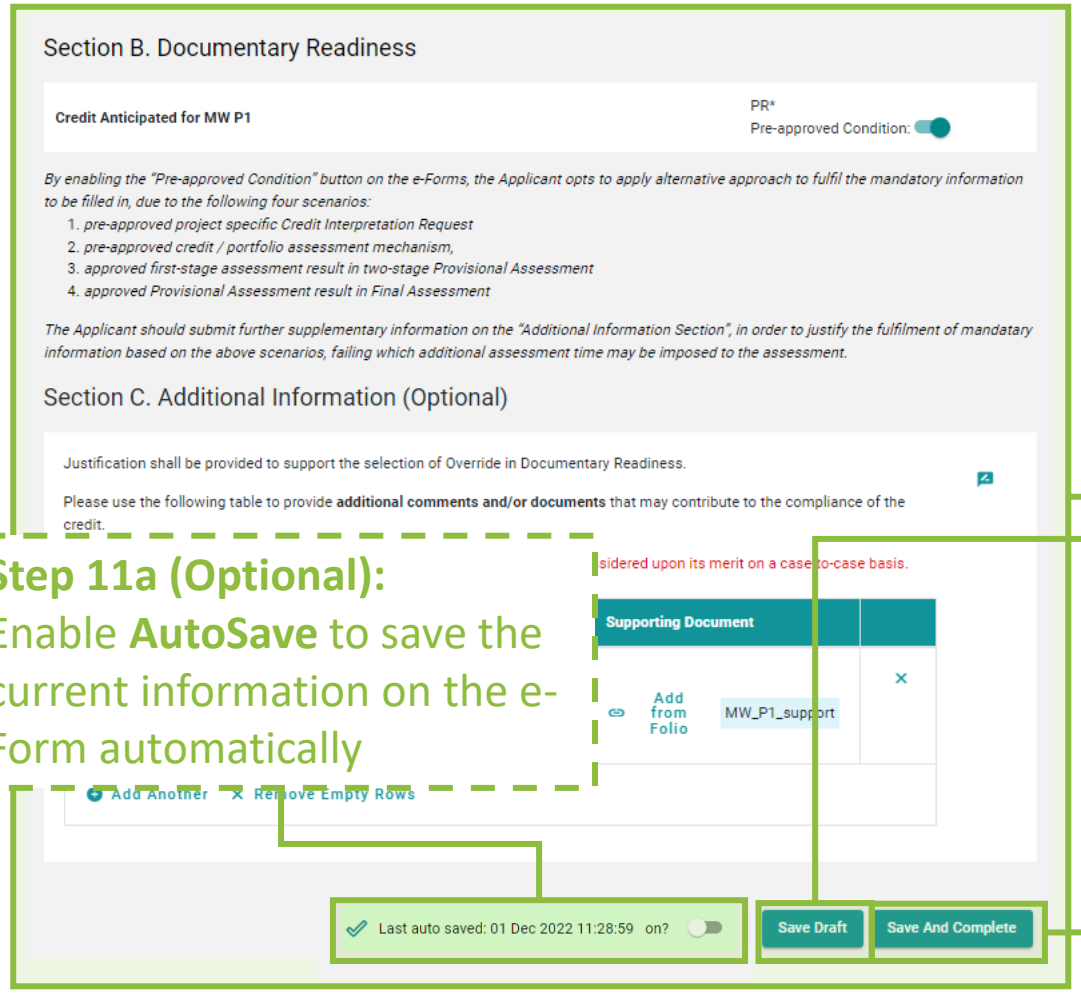
A5.8.5 Reply to Post TRC Comments



Step 10 (Optional):
Amend the **Information** provided on the e-Form

Step 11a (Optional):
Enable **AutoSave** to save the current information on the e-Form automatically

Step 11b (Optional):
Click **Save Draft** to save the current information on the e-Form for future editing

Step 11c: Click **Save and Complete** to save the information on the e-Form for assessment submission

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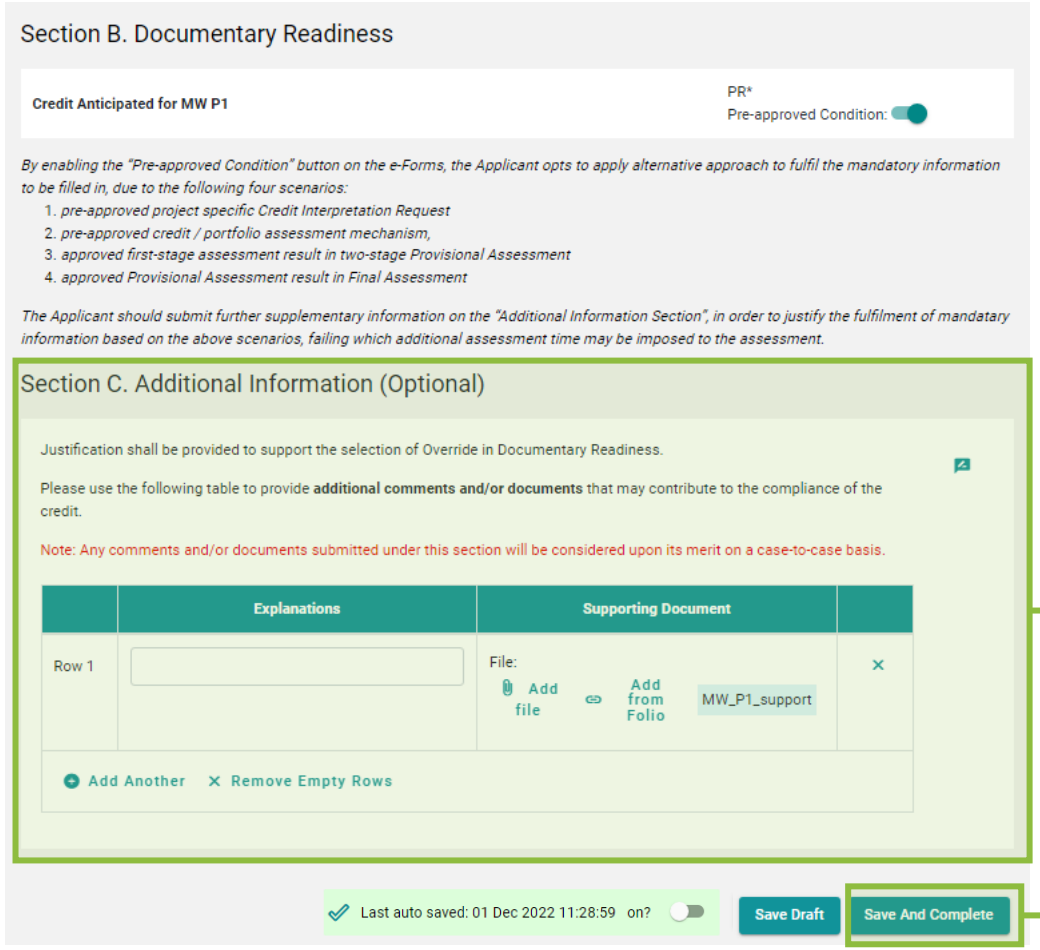
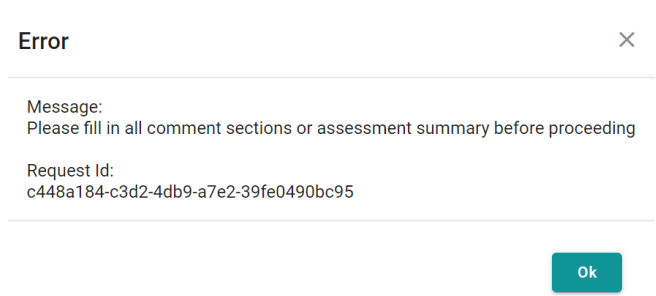
A5.8.6 Reply to Post TRC Comments



Tips:



1. The above **dialogue box** will pop up if the Applicant **Fails** to respond all Post TRC Comments issued. Please review all comments provided in the comment box and provide all necessary information on the e-Form.
2. If there are **CHANGES** made to the e-Form, the Applicant is suggested to specify the changes in the **Additional Information**.
3. If the form contains **Appendix**, please ensure each of the Appendix is saved before clicking the **Save and Complete** Button. The Appendix forms can be saved by clicking the **Save Draft** at the bottom of the e-Form.

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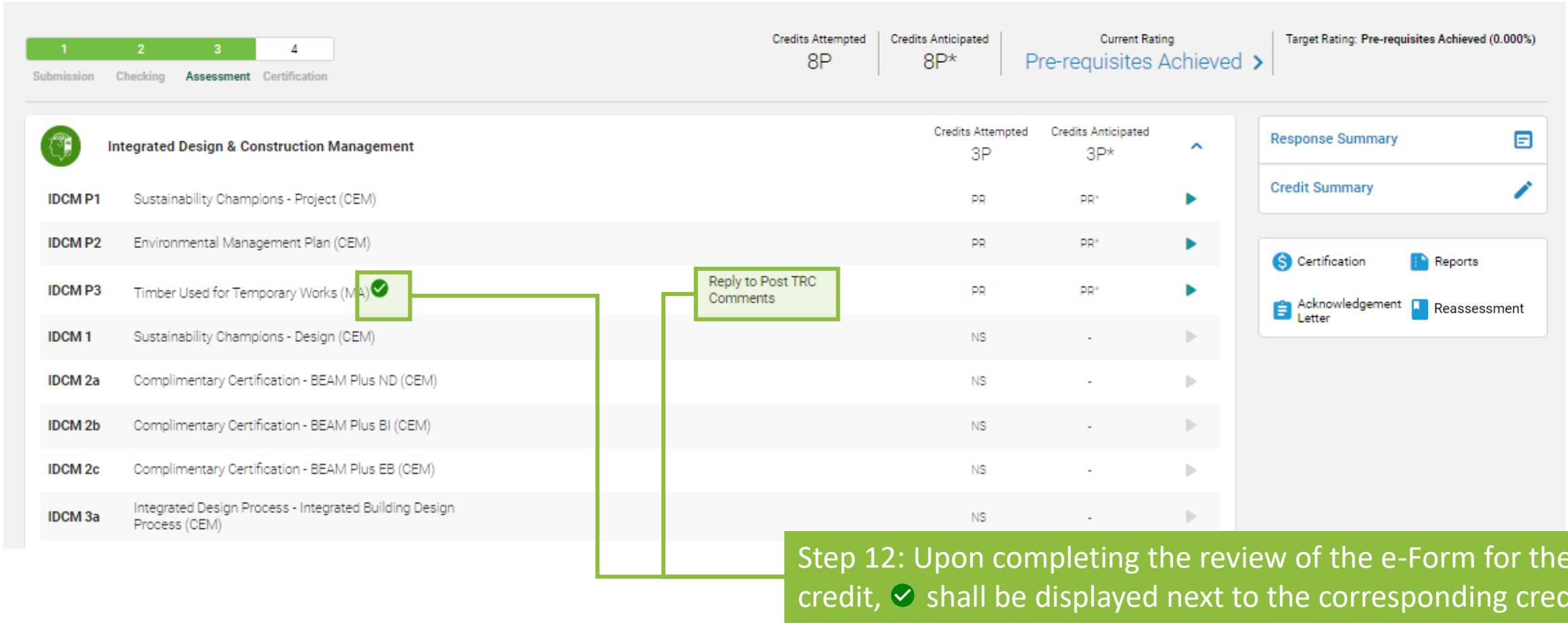
A5.8.7 Reply to Post TRC Comments



Step 12: Upon completing the review of the e-Form for the credit, ✅ shall be displayed next to the corresponding credit

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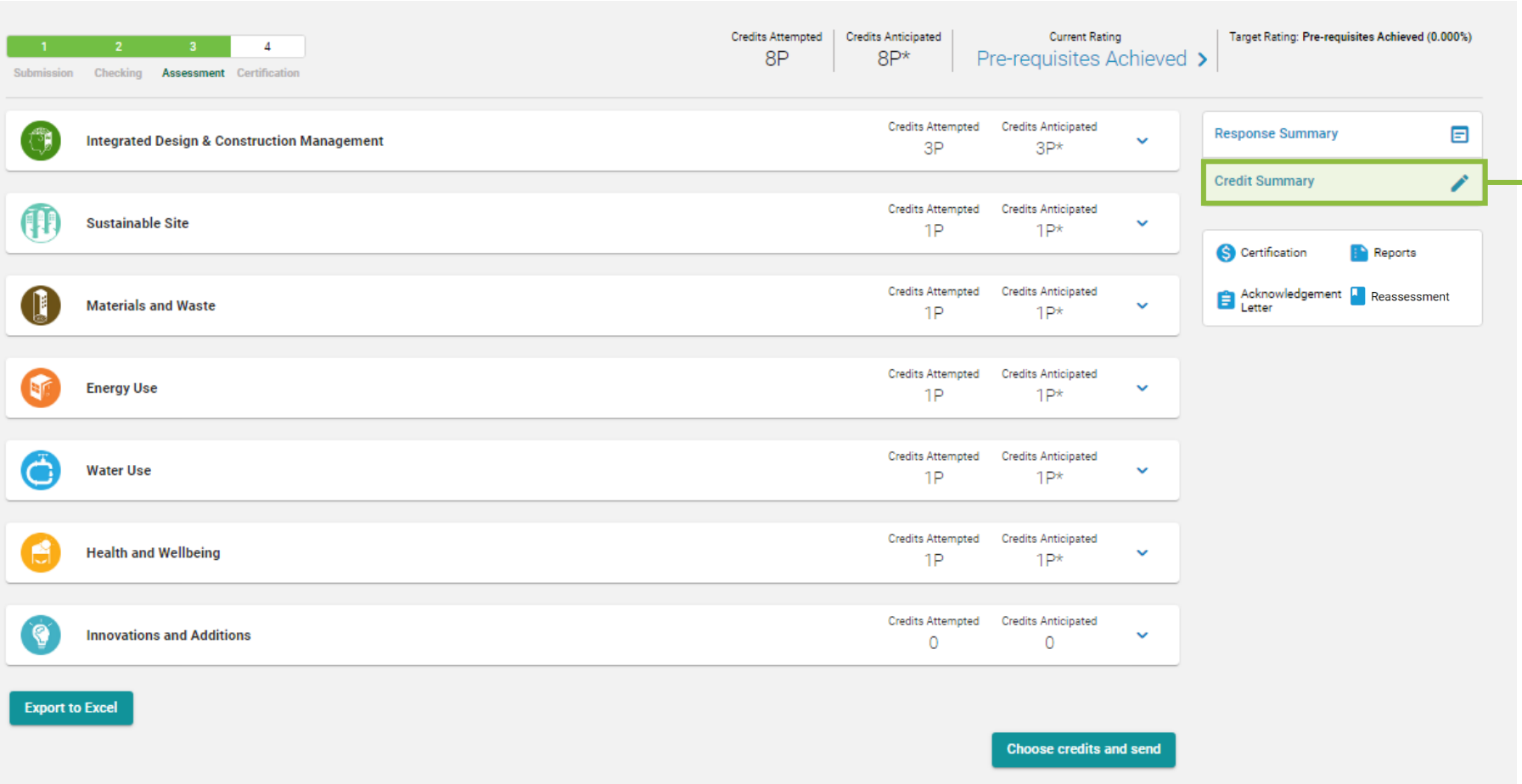
ALL

A5.8.8 Reply to Post TRC Comments



Step 13:
Click **Credit Summary** to review the information provided for the **General Information**

➔ **Please proceed to Step 20 (Section A5.8.12) for** EBP 2.0 **projects**

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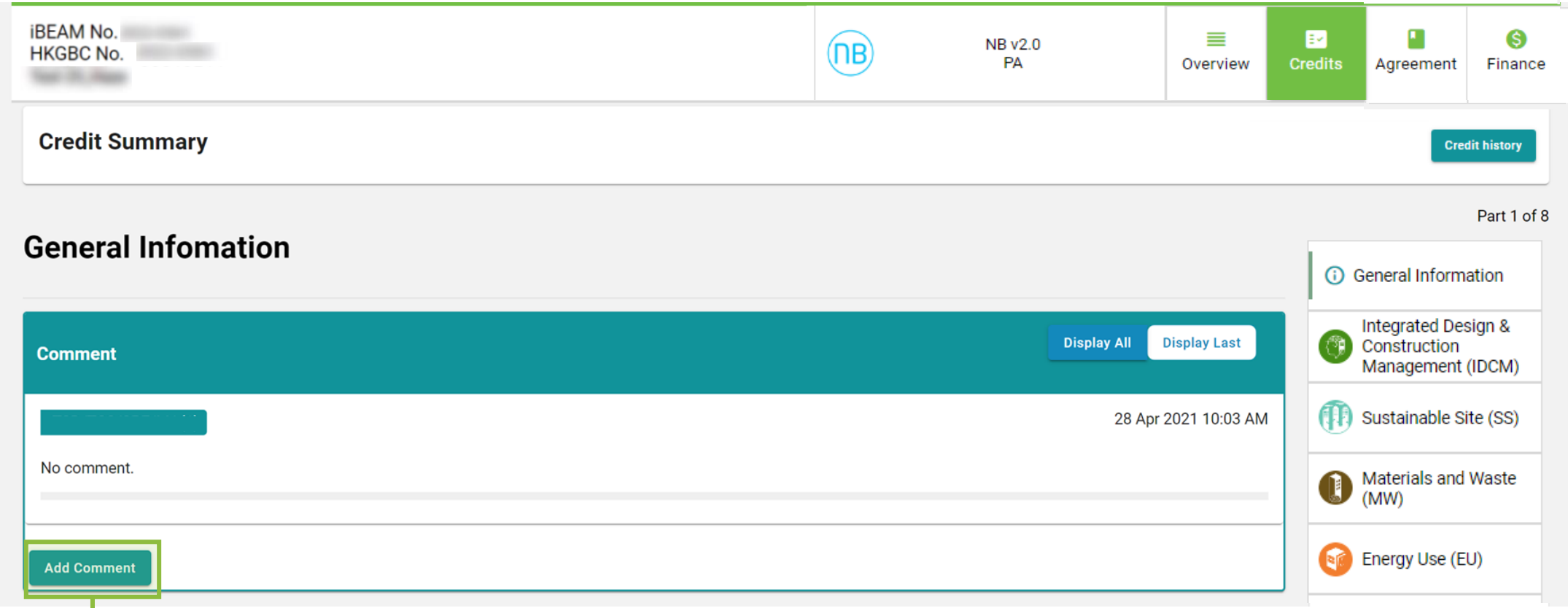
A5.8.9 Reply to Post TRC Comments



Step 14: *If comment is available*, click **Add Comment** to make a respond to the comments issued

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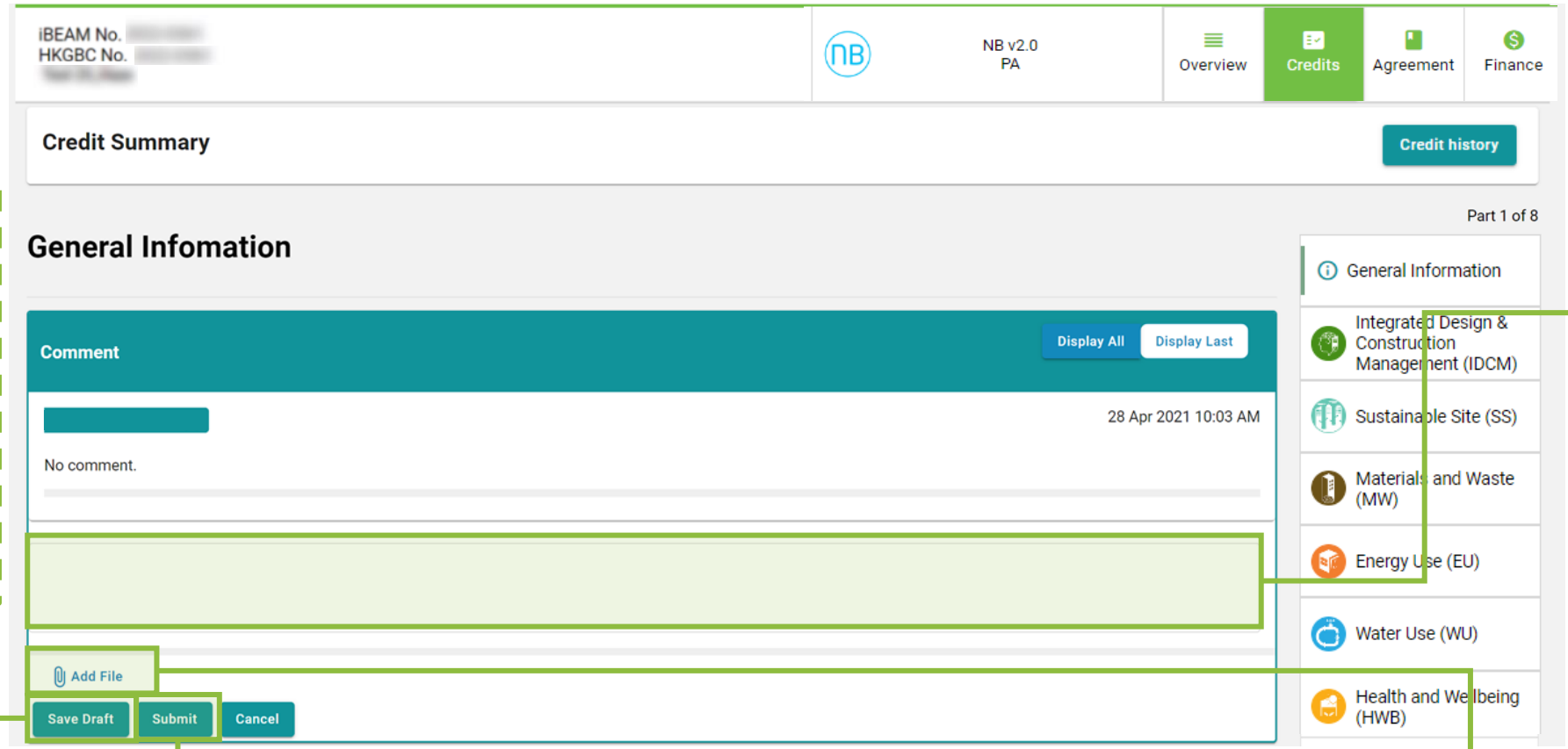
A5.8.10 Reply to Post TRC Comments



Step 17a (Optional): Click **Save Draft** to save the information made on the comment box for later editing

Step 15: Make the relevant reply to the comments in the **Comment** box

Step 17b: Click **Submit** to save the reply made to the General Information

Step 16 (Optional): **Add File** to support for the comment

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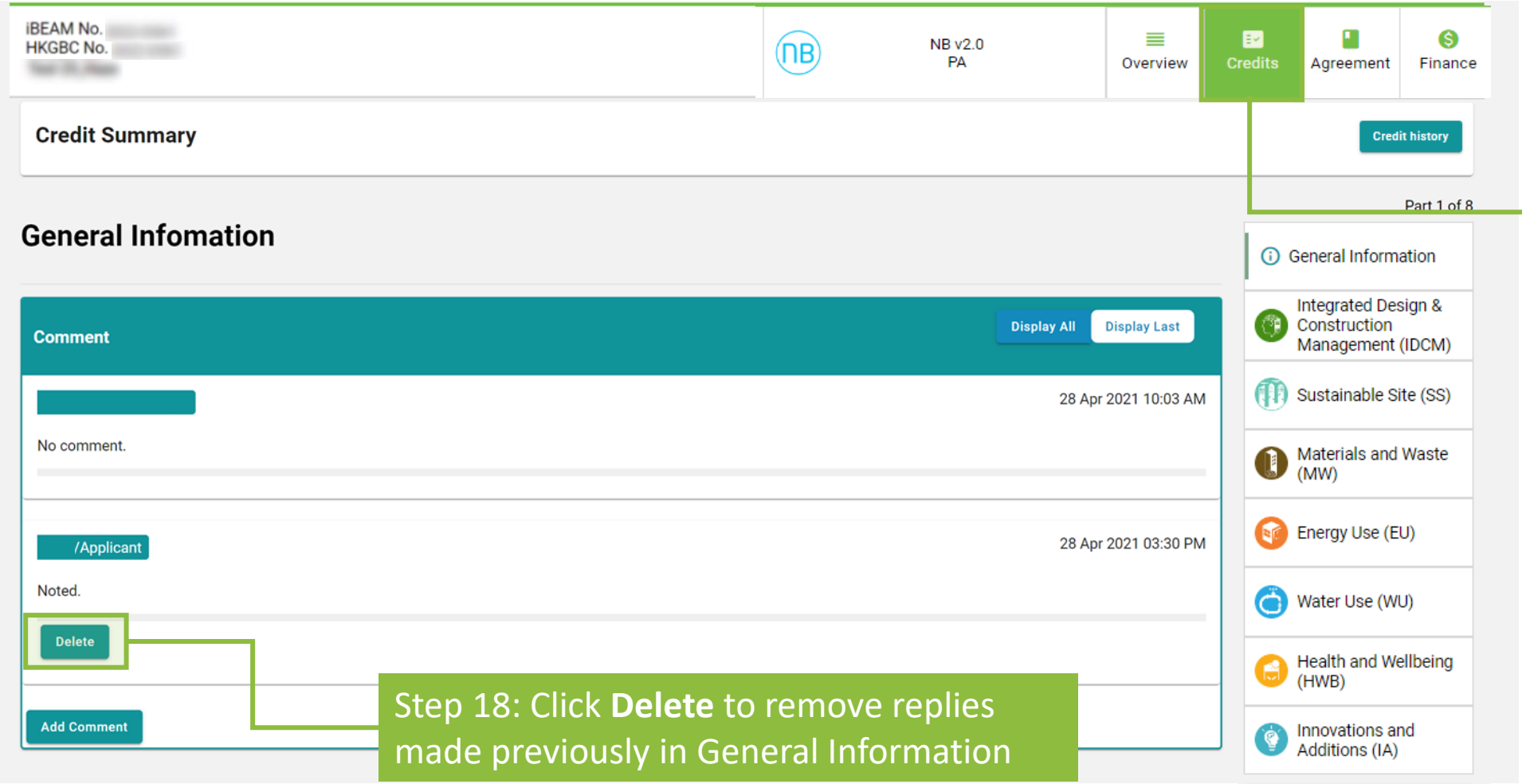
A5.8.11 Reply to Post TRC Comments



Step 19: Click **Credits** to go back to the **Credit Summary Dashboard**

Step 18: Click **Delete** to remove replies made previously in General Information

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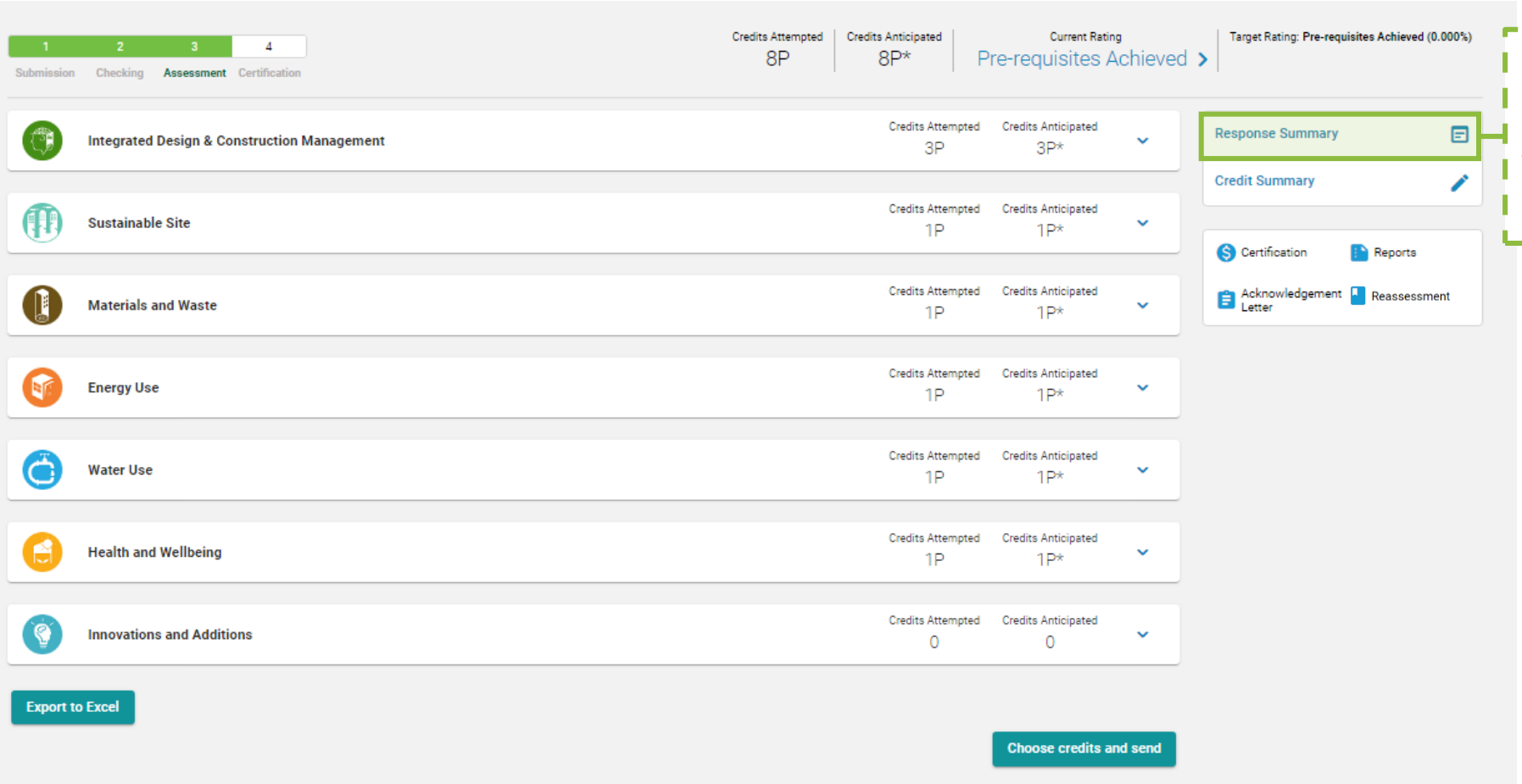
A5.8.12 Reply to Post TRC Comments

ALL



Step 20 (Optional):
Click **Response Summary** to view the summary of replies made to all submitted e-Forms

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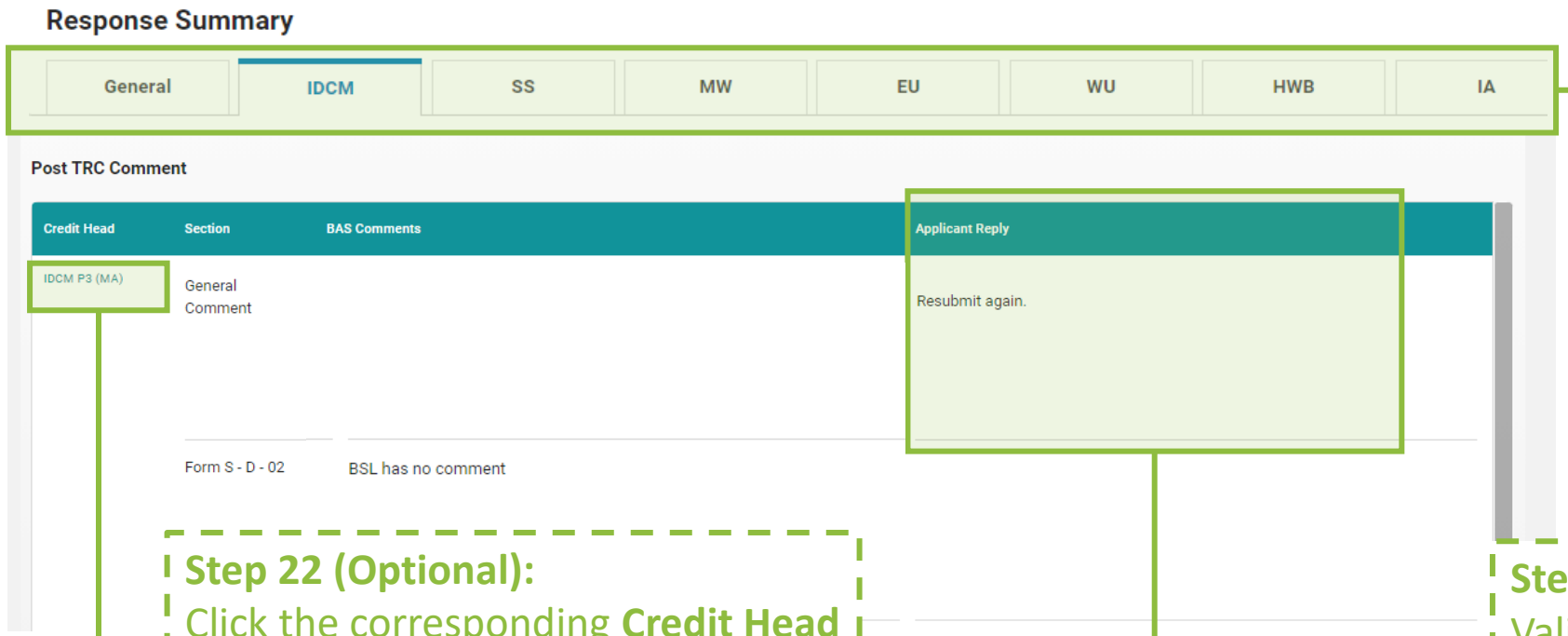
A5.8.13 Reply to Post TRC Comments

Step 21 (Optional):
Click on the different Aspect tab on the top to access the response summary of the Aspect



Step 22 (Optional):
Click the corresponding **Credit Head** to amend the Applicant Reply in the e-Form

Step 23 (Optional):
Validate the reply to the Post TRC Comments under the **Applicant Reply** column

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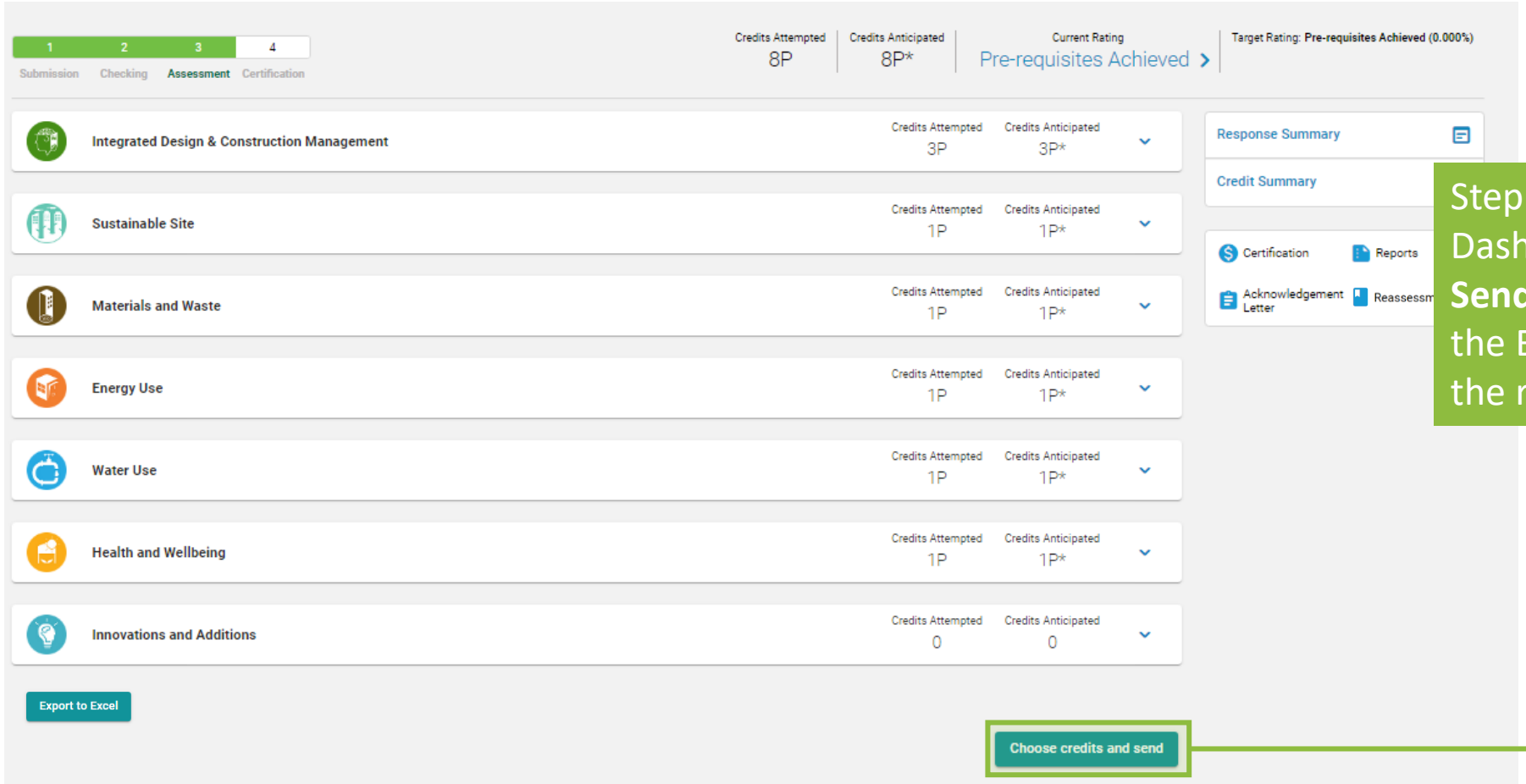
ALL

A5.8.14 Reply to BAS Comments



Step 24: Back to the Credit Summary Dashboard, click **Choose Credits and Send** to complete making a reply to the BAS Comments and submitting the revised submission for assessment

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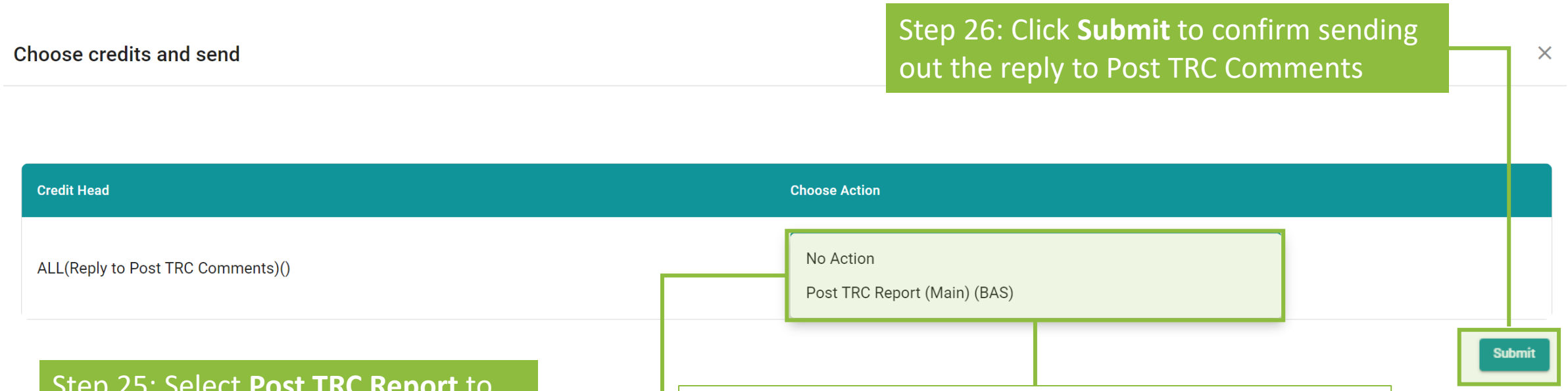
A5.8.15 Reply to Post TRC Comments

ALL



Step 26: Click **Submit** to confirm sending out the reply to Post TRC Comments

Step 25: Select **Post TRC Report** to instruct iBEAM to send out the reply to Post TRC Comments

Tips:

Post TRC Report option will only be shown if the comments to the e-Form have been **properly completed for all submitted credits under that Aspect**.

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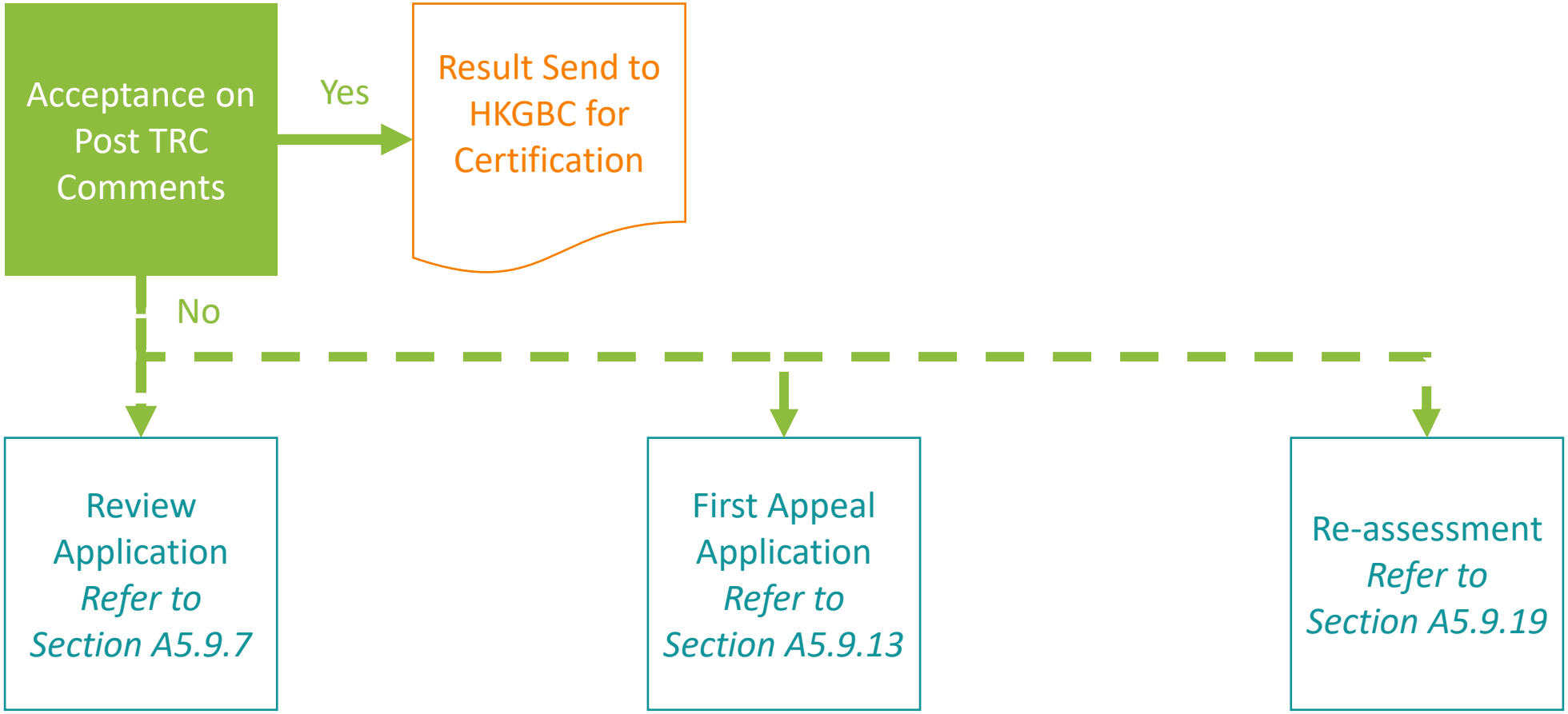
A5.9 Acceptance on Assessment Result

ALL

Process Overview



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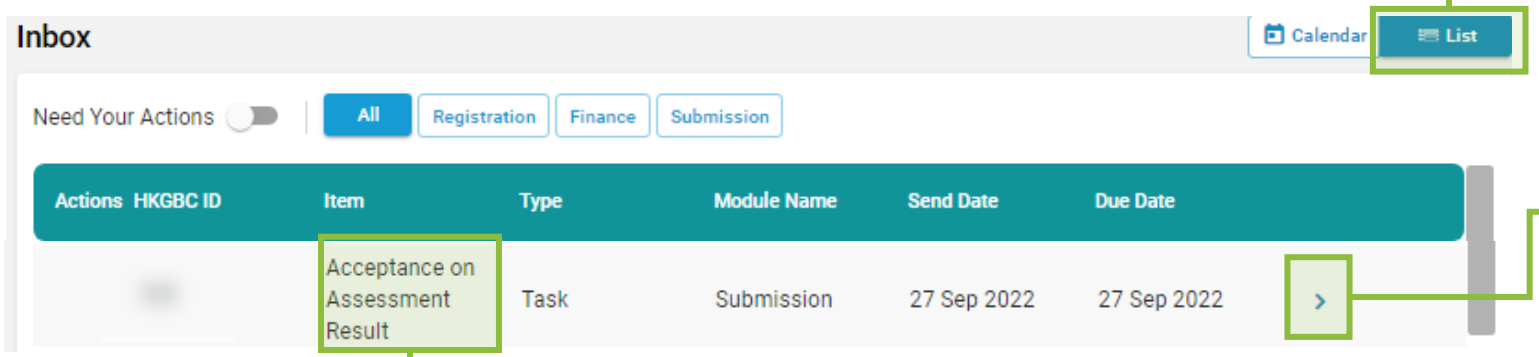
A5.9.1 Acceptance on Assessment Result



Step 1:
In the **Account Dashboard**, click **List** view under **Inbox**

Step 2:
Once the assessment result has been issued, **Notification** will be shown in the **Inbox** requesting the Applicant to make an **Acceptance** on Assessment Result. Click the link provided in the notification to access the project

Tips:

For items that require Applicant to accept Assessment Result, the identity of **Acceptance on Assessment Result** will be shown under **Item**.

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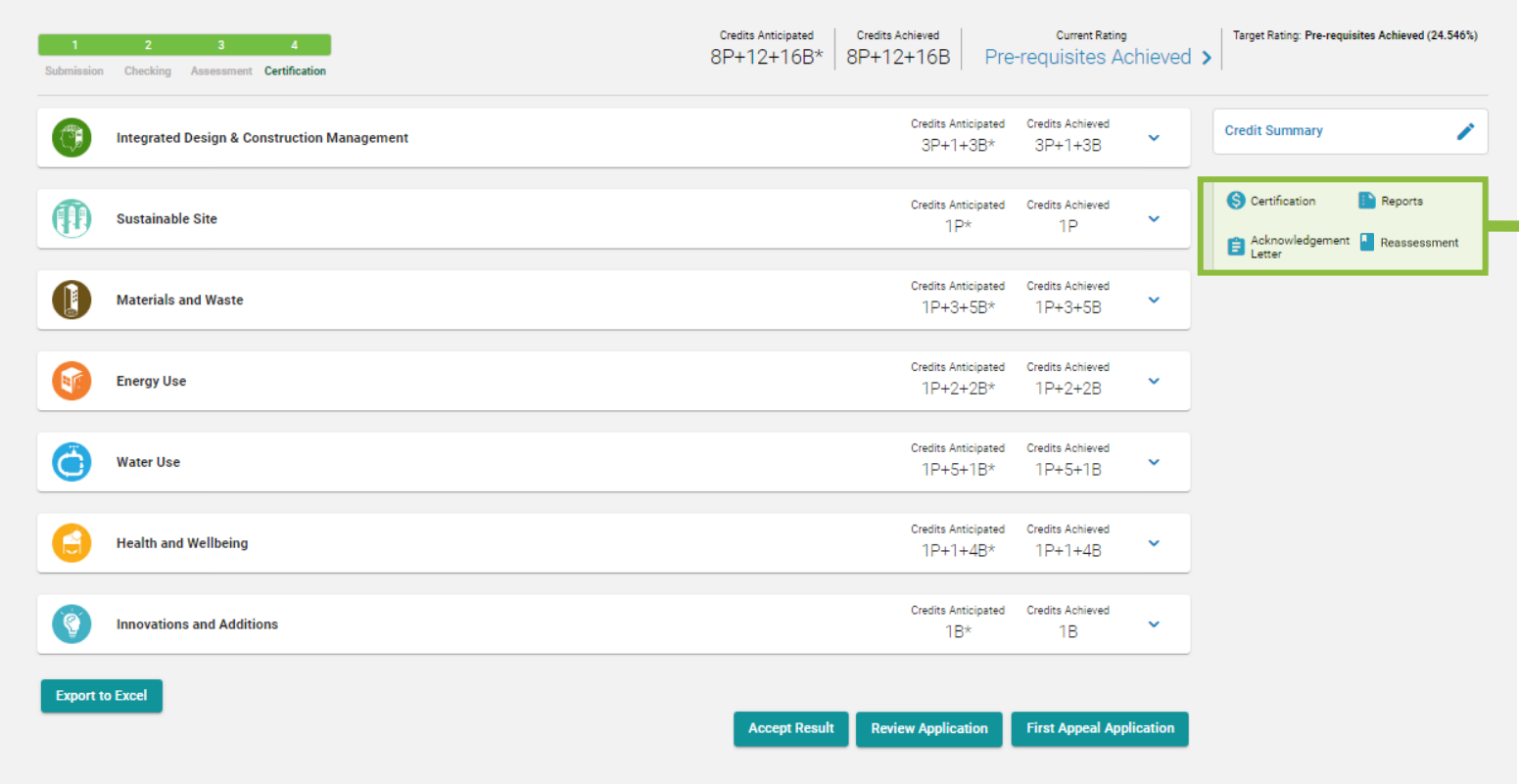
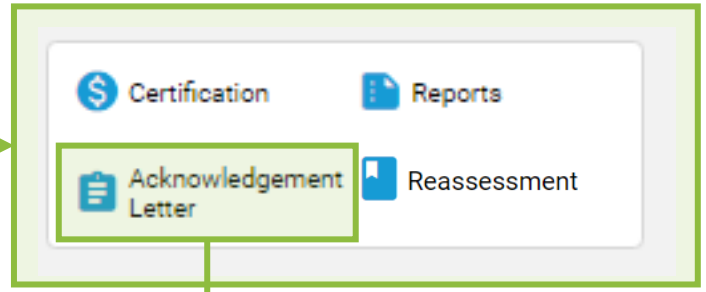
A5.9.2 Acceptance on Assessment Result





Step 3: Click **Acknowledgement Letter** to download the result acknowledgement letter issued by BSL

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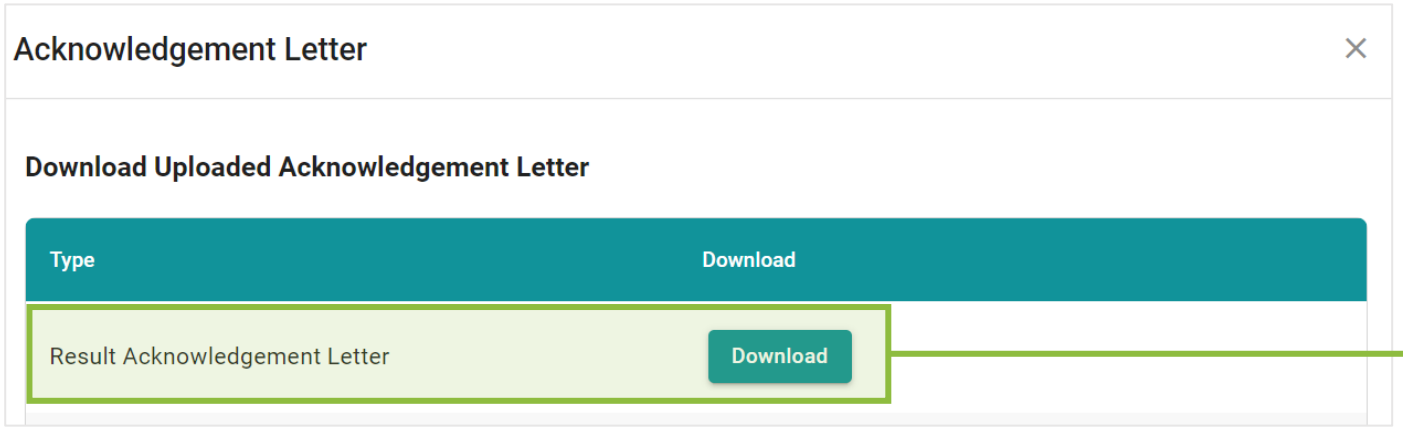
A5.9.3 Acceptance on Assessment Result



Step 4: Click **Download** next to **Result Acknowledgement Letter** to download the result acknowledgement letter

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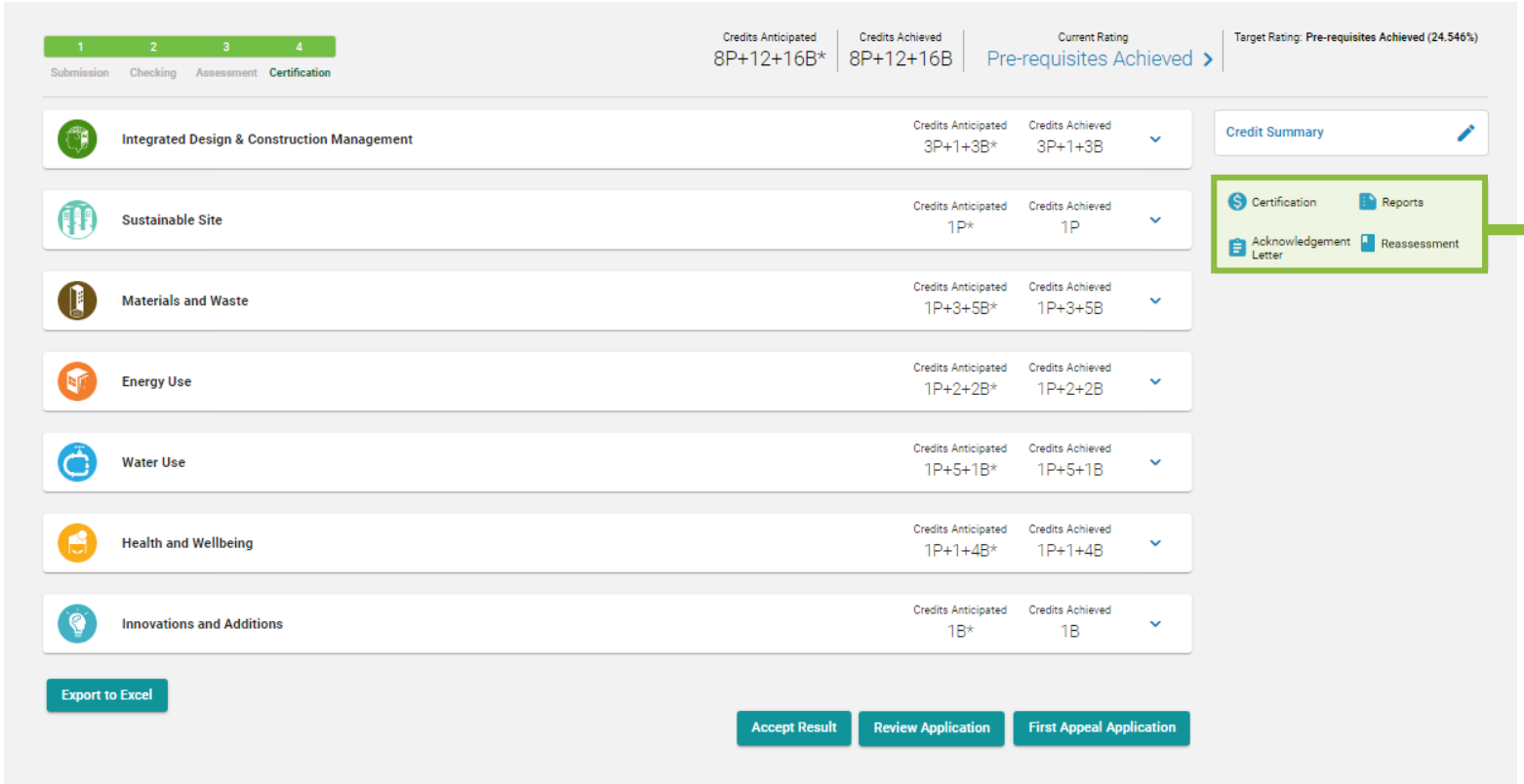
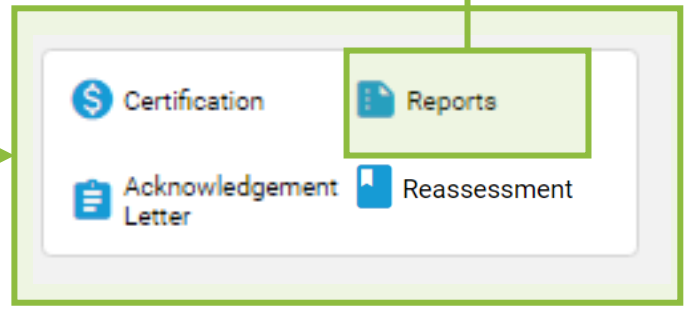
A5.9.4 Acceptance on Assessment Result

Step 5: Click **Report** to download the assessment report issued by BSL





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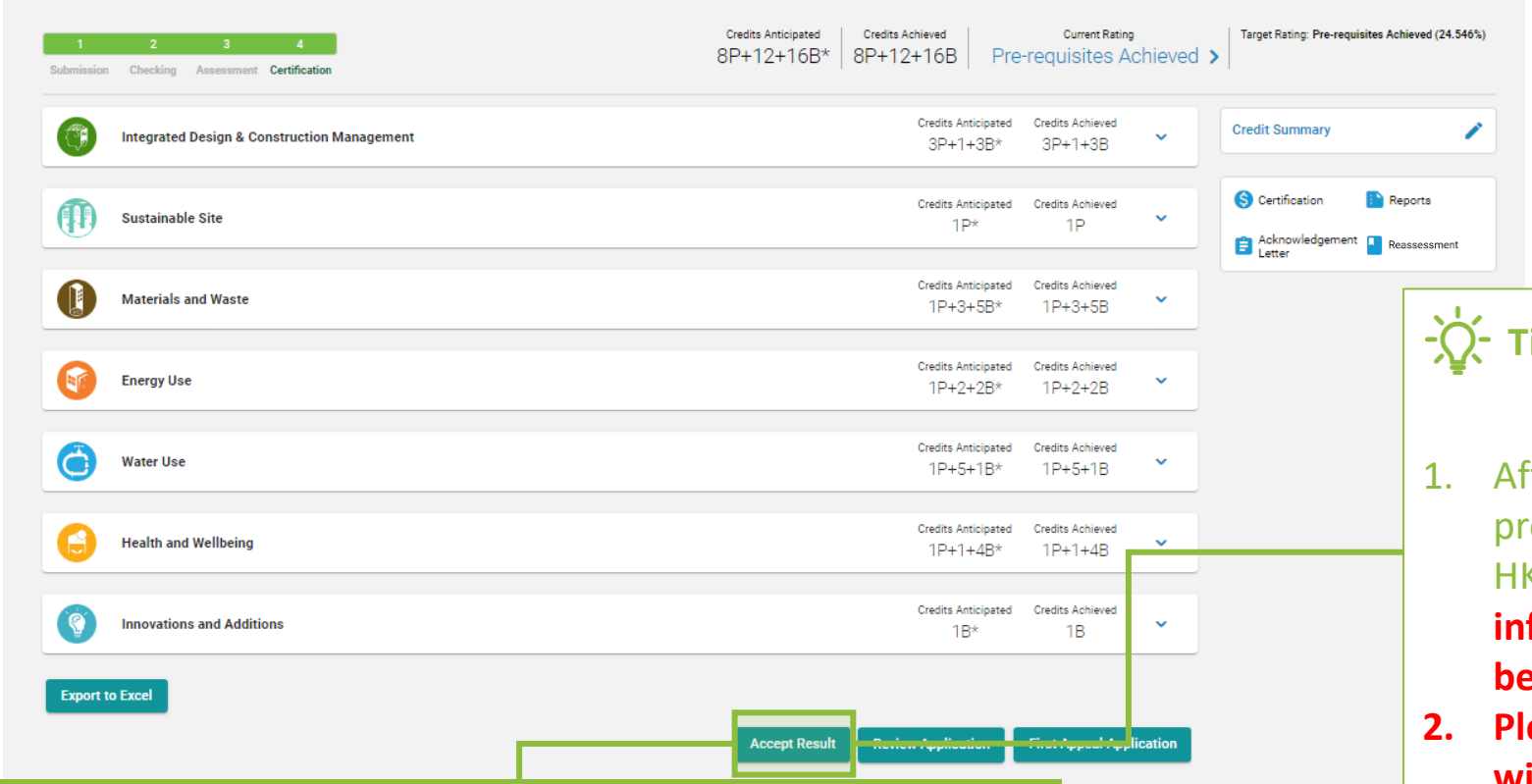
ALL

A5.9.5 Acceptance on Assessment Result



Step 6a: Click **Accept Result** to accept the assessment result and have the assessment be sent to HKGBC

Tips:

1. After clicking the **Accept Result** button, ALL project information will be frozen and be sent to HKGBC for certification. **Please ensure all information in the Project Fact Sheet is updated before clicking the Accept Result button.**
2. **Please do NOT click Accept Result if the project will undergo Review or First Appeal.**

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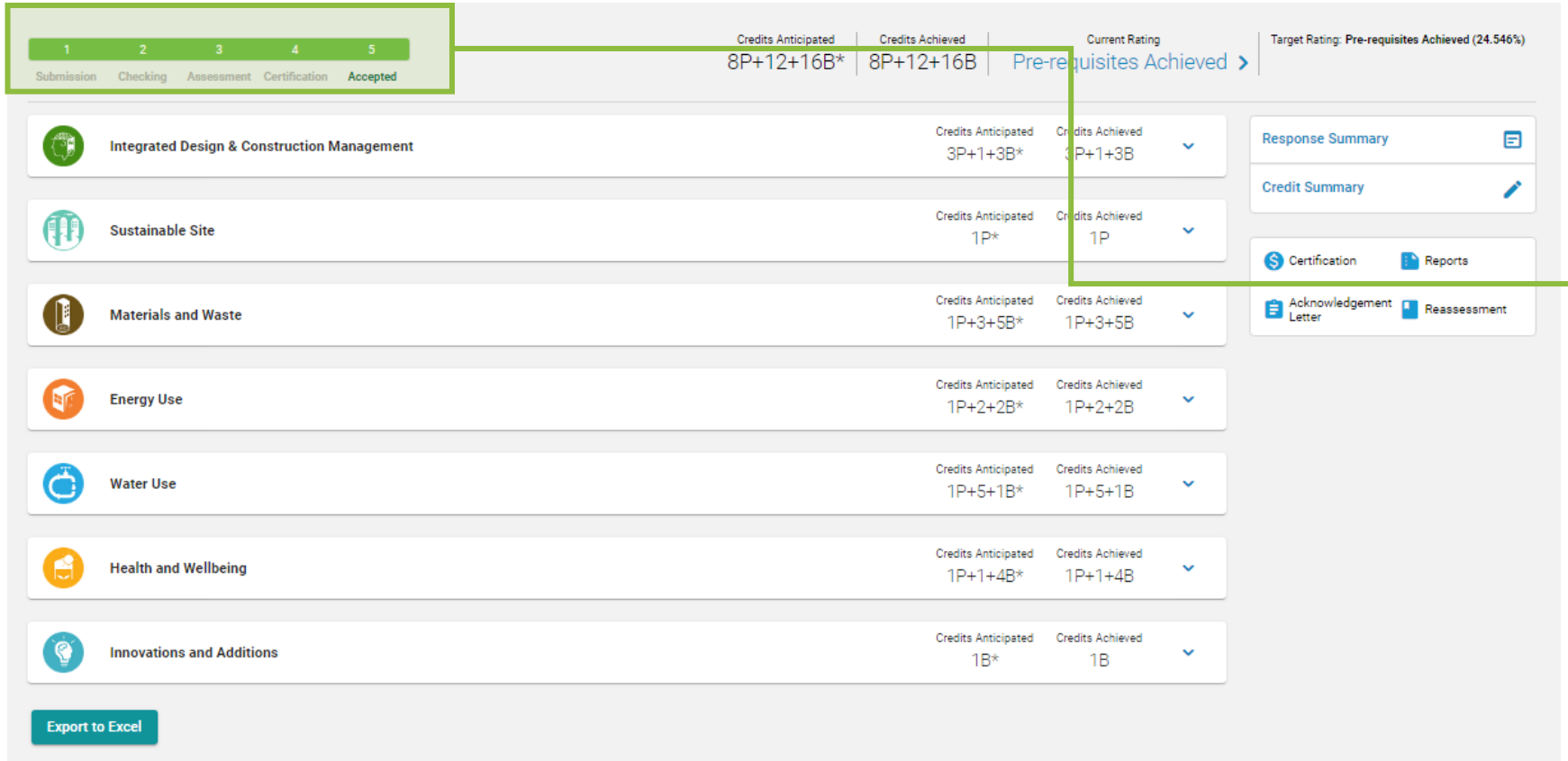
A5.9.6 Acceptance on Assessment Result



Step 6b: *If result is accepted under Step 6a,* the project status bar will indicate **5 Accepted** demonstrating that the assessment has been completed

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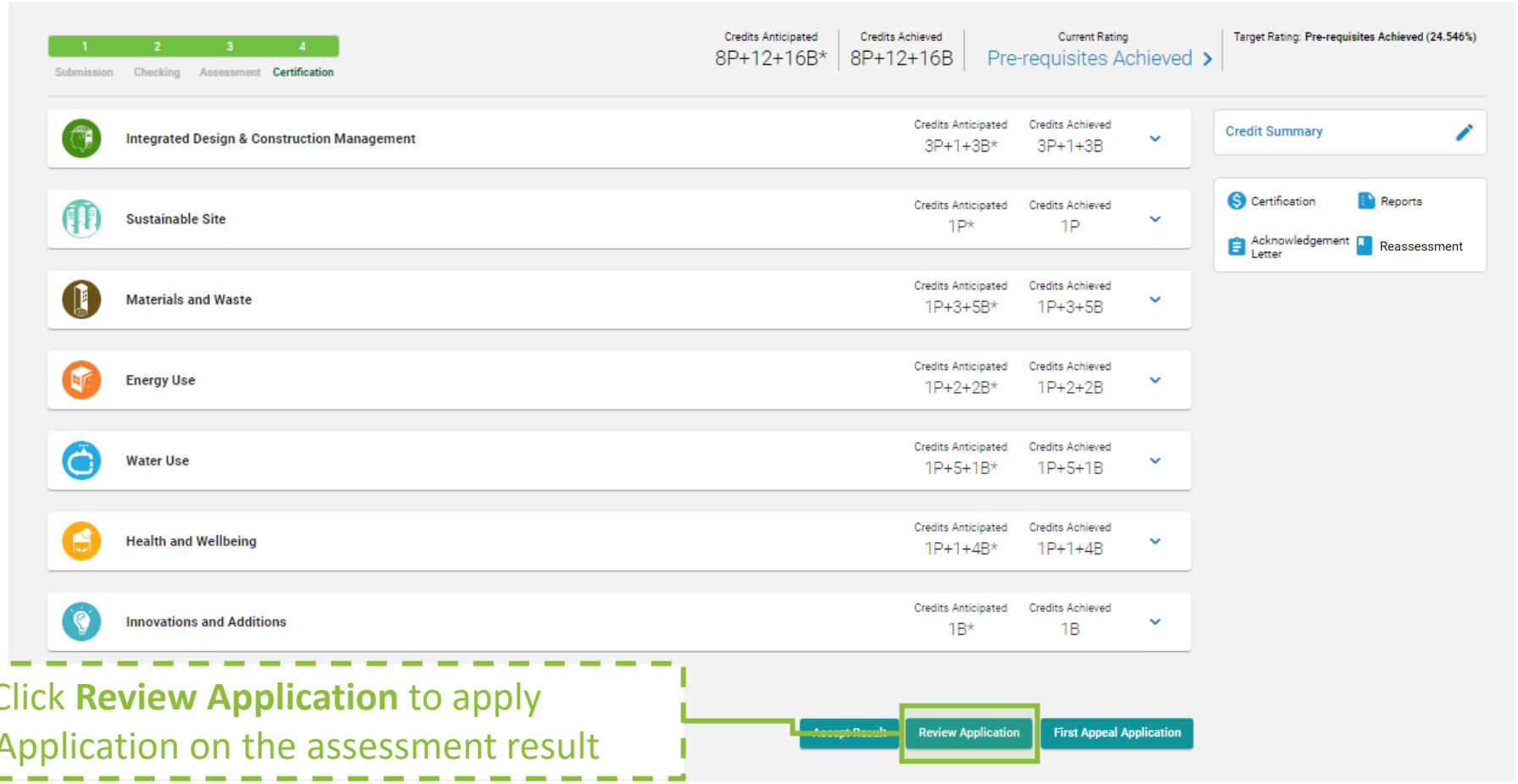
A5.9.7 Acceptance on Assessment Result

(a) Review Application



Step 1: Click **Review Application** to apply Review Application on the assessment result

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A5.9.8 Acceptance on Assessment Result

(a) Review Application

Step 2: Select whether the **Review Application** is applying to the selected credit
(✓ for Yes / ✕ for No)

Step 3: Type the reasons to support the Review Application in the **Reason** text box *if ✕ is selected in Step 2*

Step 4 (Optional):
Add File to support the reason

Step 5: Click **Submit** to confirm sending out the Review Application

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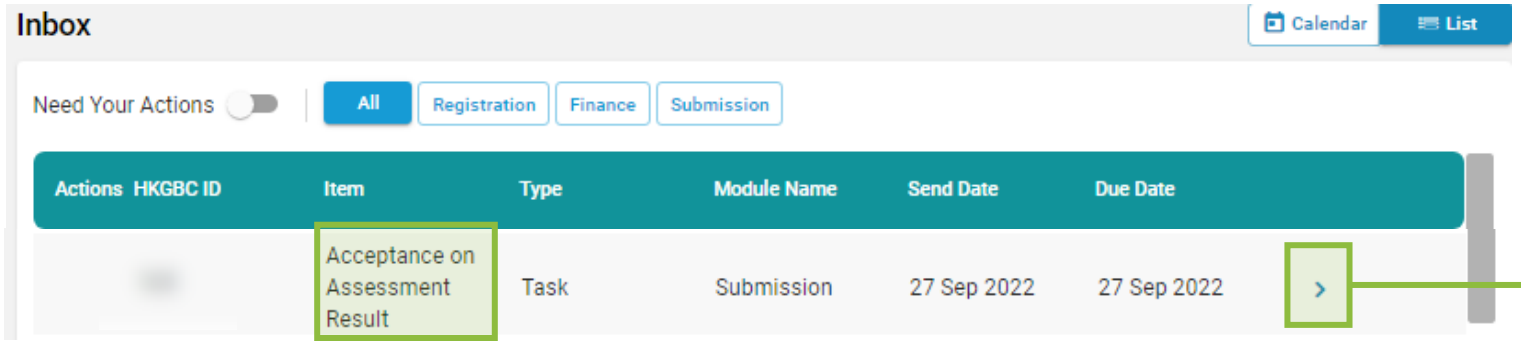
A5.9.9 Acceptance on Assessment Result

(a) Review Application



Step 6:
Once the assessment result has been issued, Notification will be shown in the Inbox requesting the Applicant to make an Acceptance on Assessment Result. Click the link provided in the notification to access the project

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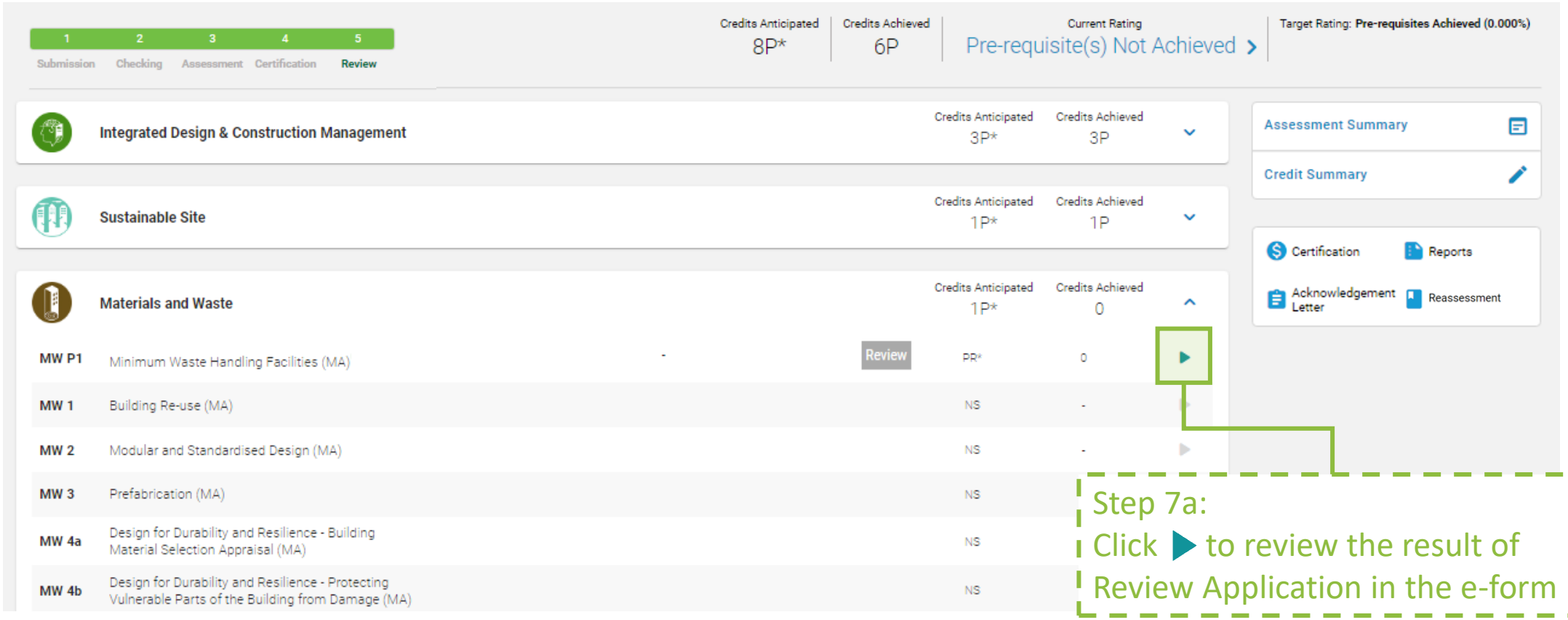
A5.9.10 Acceptance on Assessment Result

(a) Review Application



Step 7a:
Click ▶ to review the result of Review Application in the e-form

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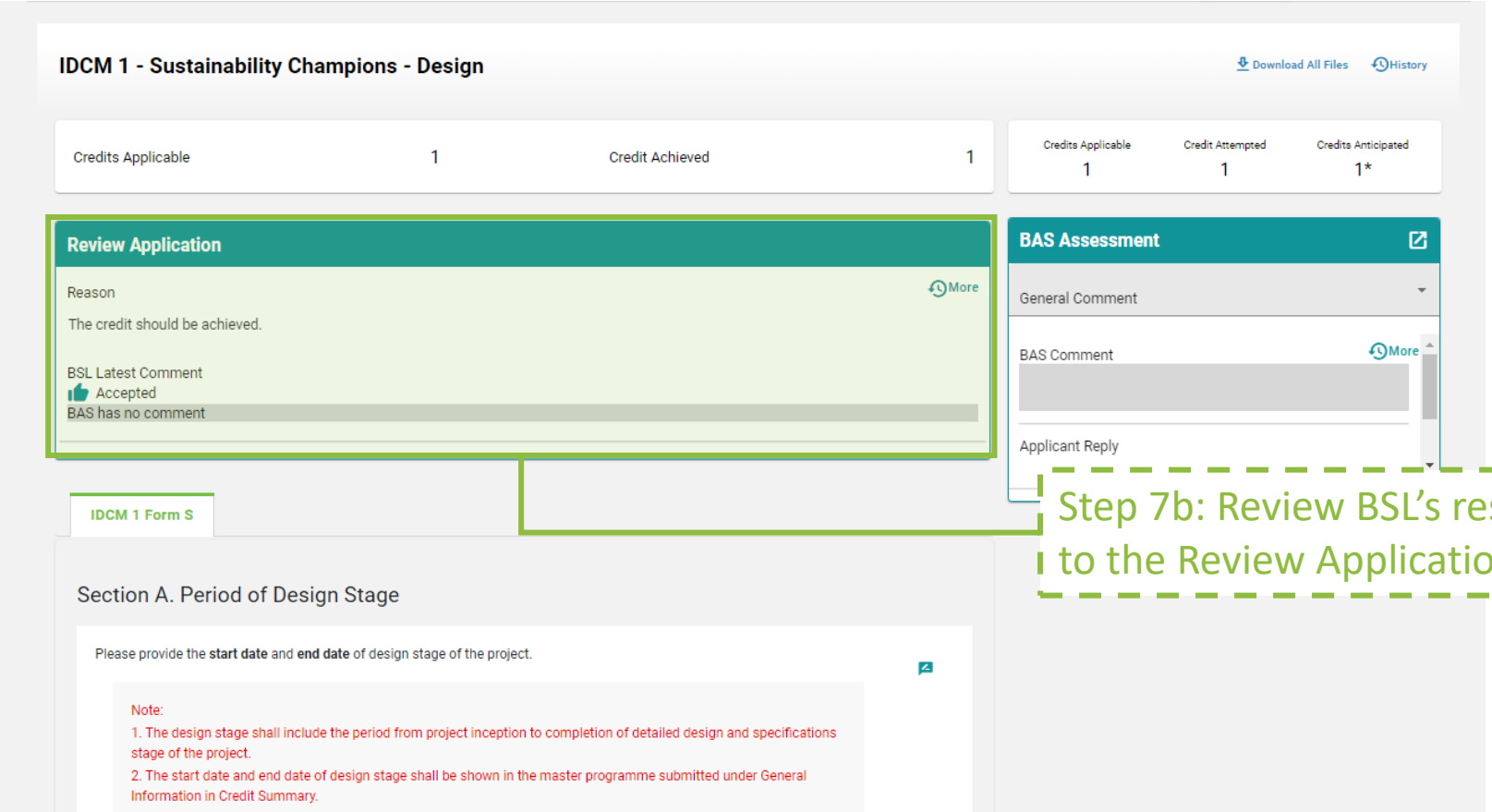
A5.9.11 Acceptance on Assessment Result

(a) Review Application



Step 7b: Review BSL's response to the Review Application

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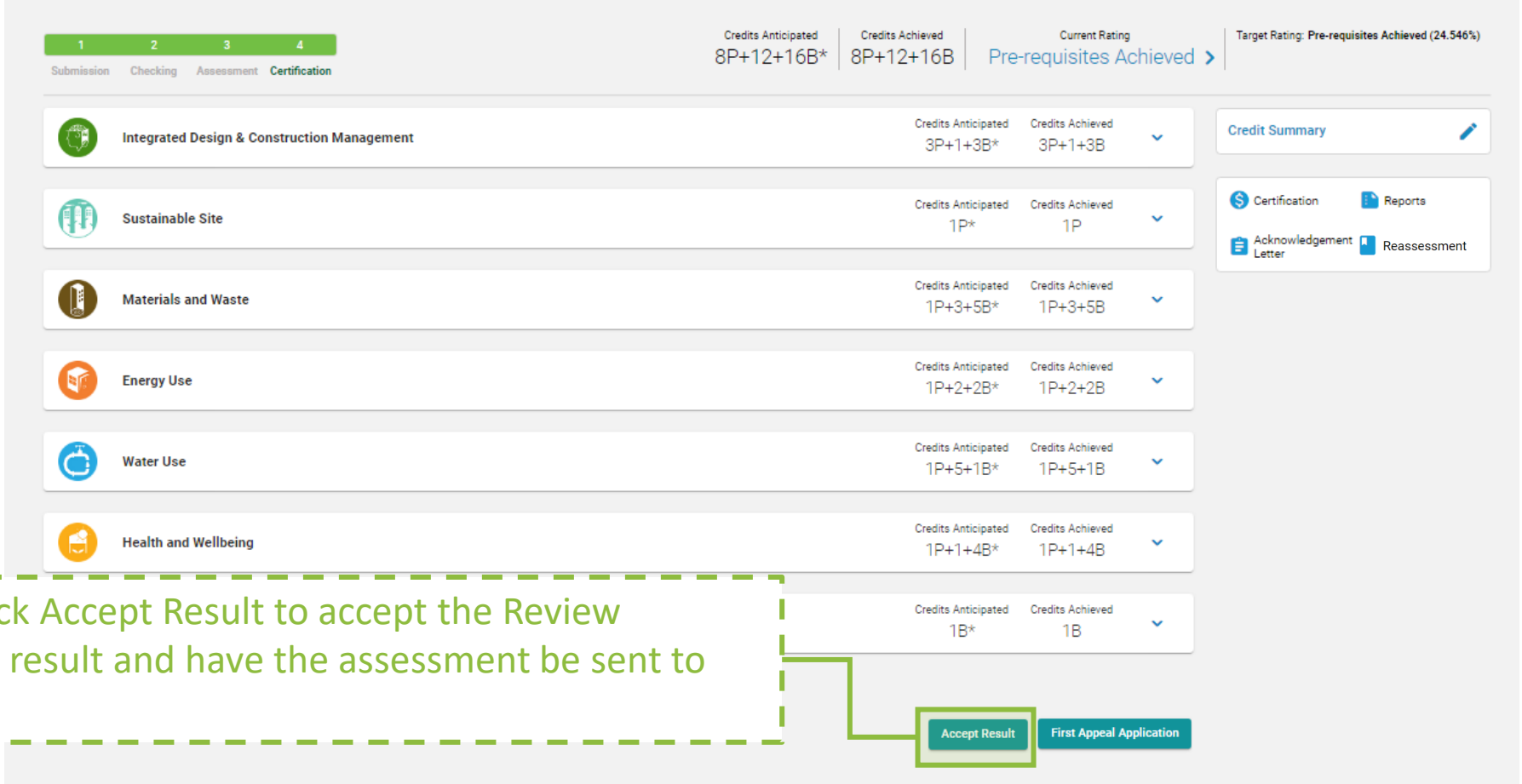
A5.9.12 Acceptance on Assessment Result

(a) Review Application



Step 7c: Click Accept Result to accept the Review Application result and have the assessment be sent to HKGBC

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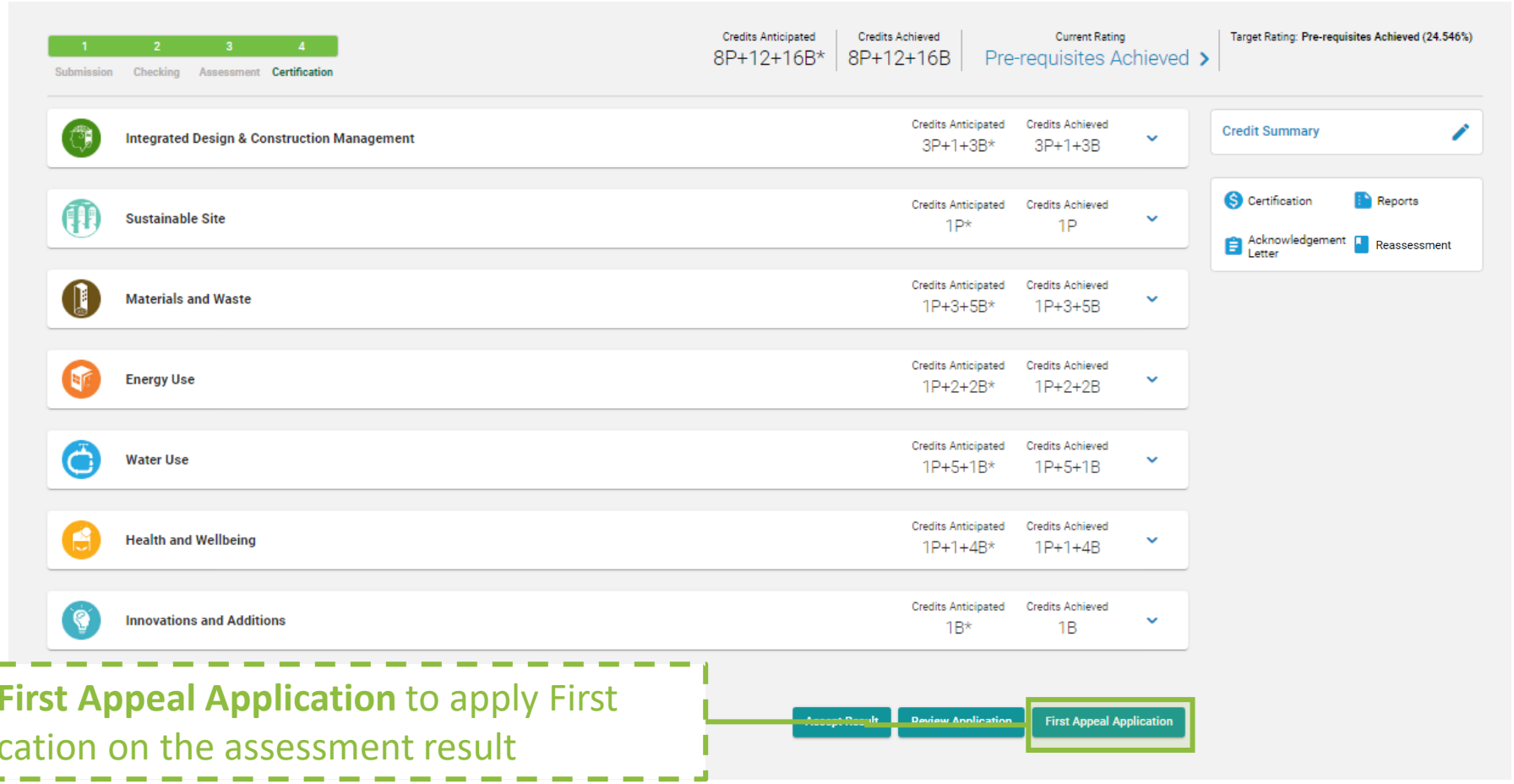
A5.9.13 Acceptance on Assessment Result

(b) First Appeal Application



Step 1: Click **First Appeal Application** to apply First Appeal Application on the assessment result

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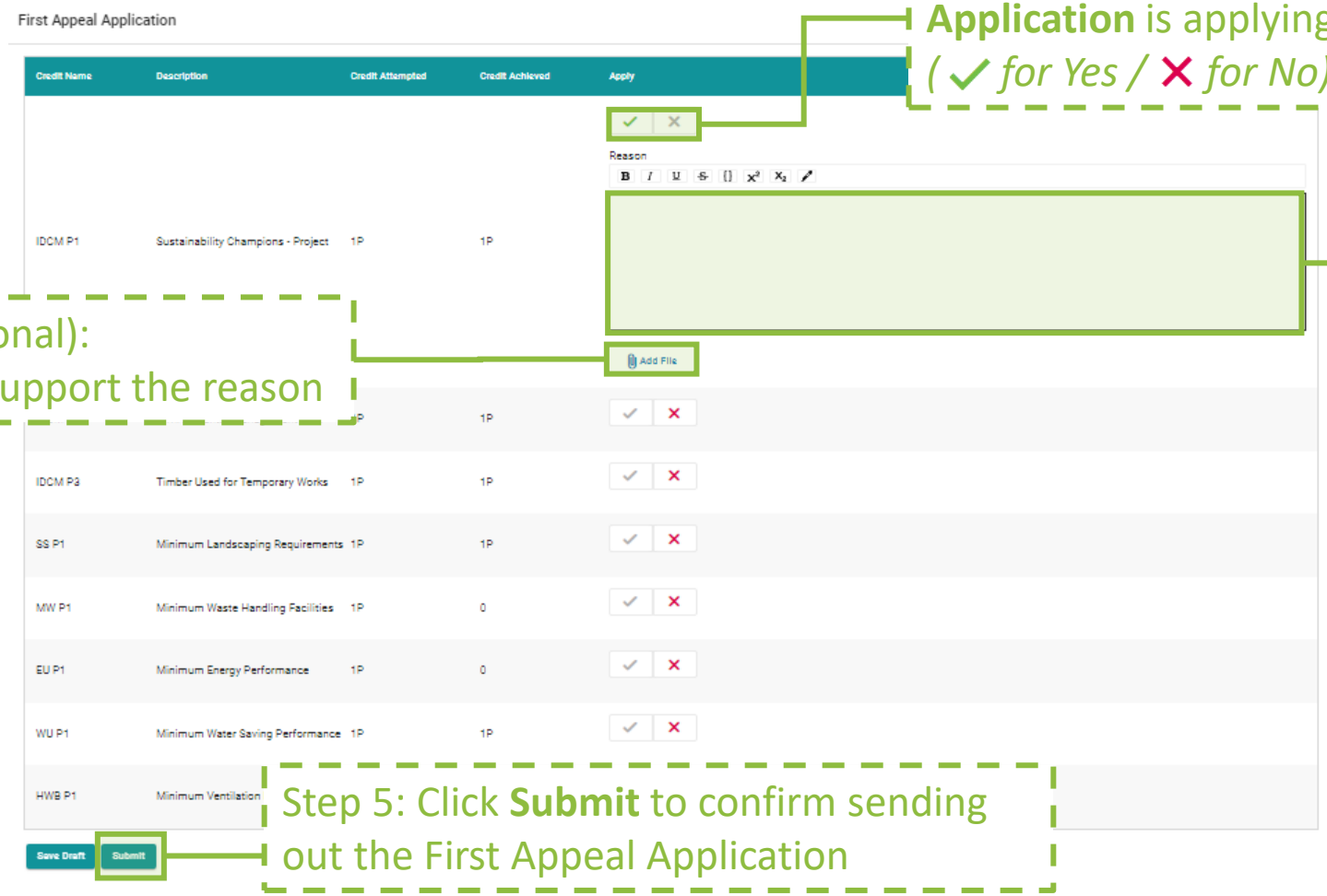
A5.9.14 Acceptance on Assessment Result

(b) First Appeal Application



Step 2: Select whether the **First Appeal Application** is applying to the selected credit (✓ *for Yes* / ✗ *for No*)

Step 3: Type the reasons to support the First Appeal Application in the **Reason** text box *if* ✗ *is selected in Step 2*

Step 4 (Optional): **Add File** to support the reason

Step 5: Click **Submit** to confirm sending out the First Appeal Application

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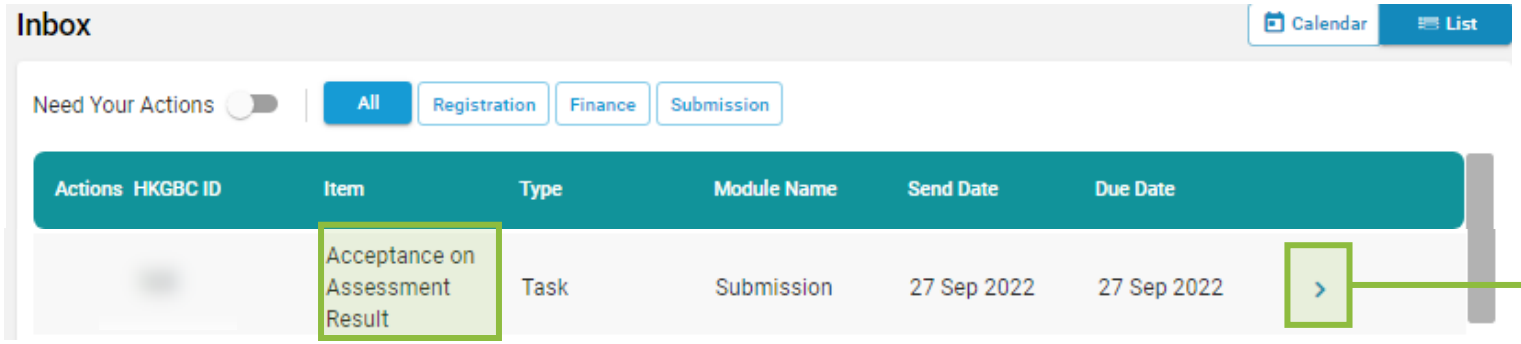
ALL

A5.9.15 Acceptance on Assessment Result

(b) First Appeal Application



Step 6:
Once the assessment result has been issued, Notification will be shown in the Inbox requesting the Applicant to make an Acceptance on Assessment Result. Click the link provided in the notification to access the project

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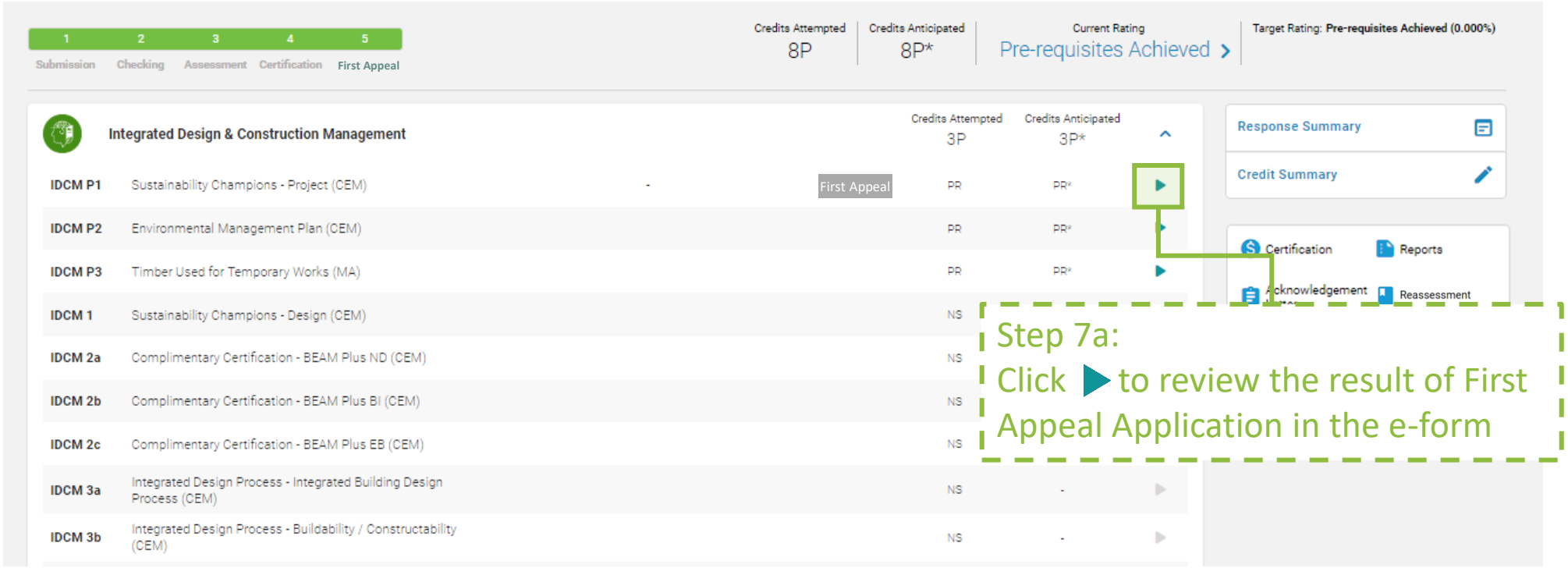
A5.9.16 Acceptance on Assessment Result

(b) First Appeal Application



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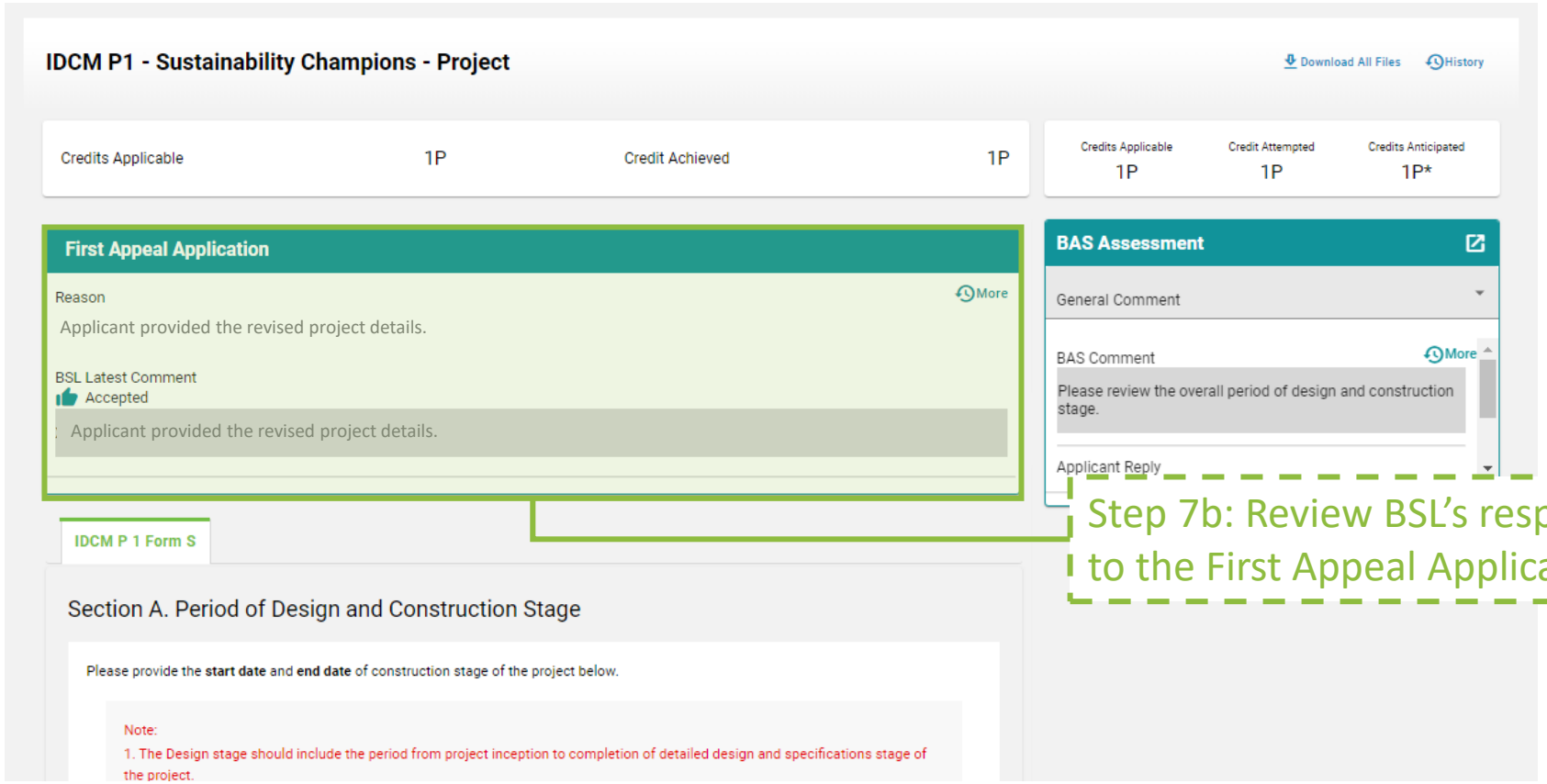
A5.9.17 Acceptance on Assessment Result

(b) First Appeal Application



Step 7b: Review BSL's response to the First Appeal Application

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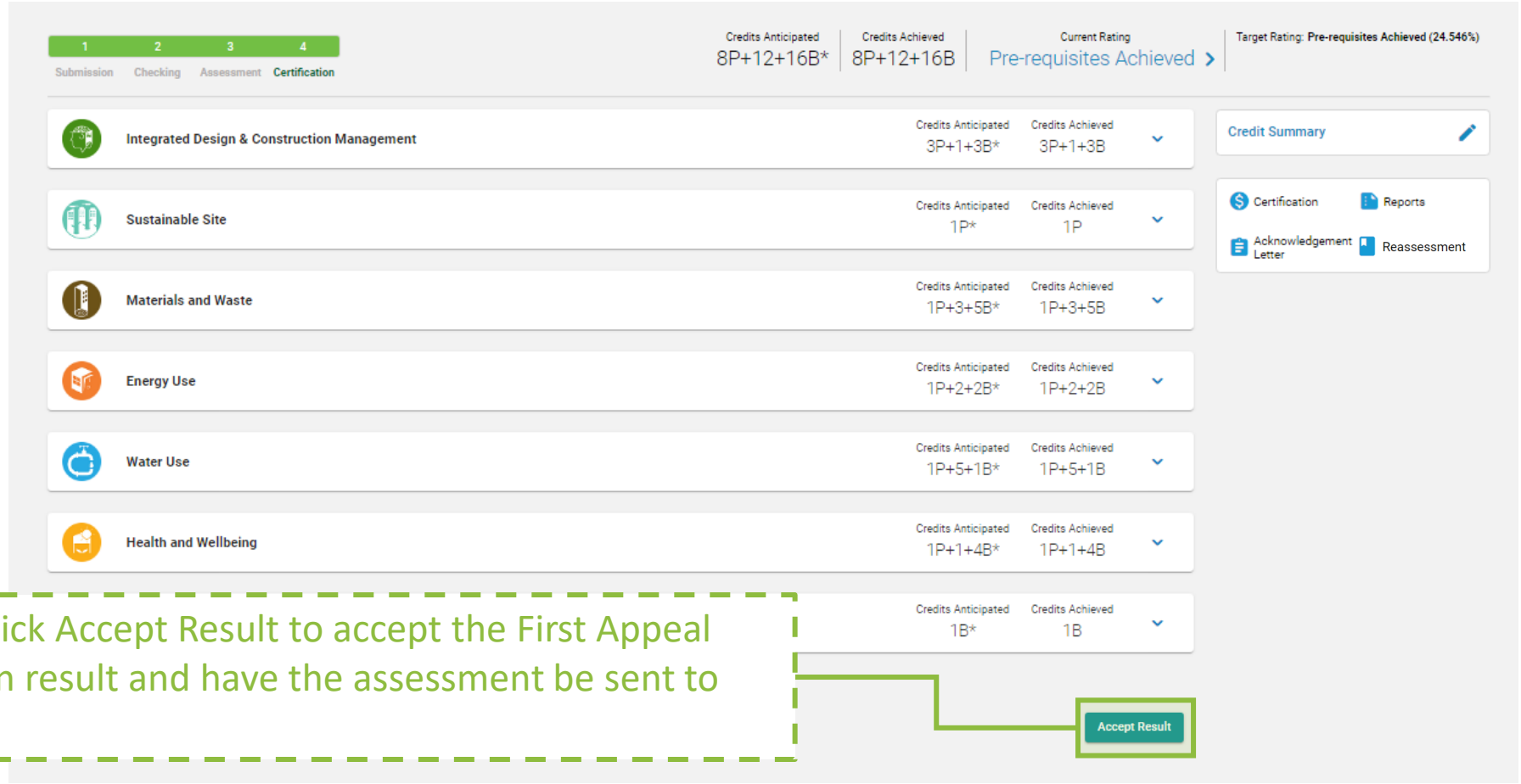
A5.9.18 Acceptance on Assessment Result

(b) First Appeal Application



Step 7c: Click Accept Result to accept the First Appeal Application result and have the assessment be sent to HKGBC

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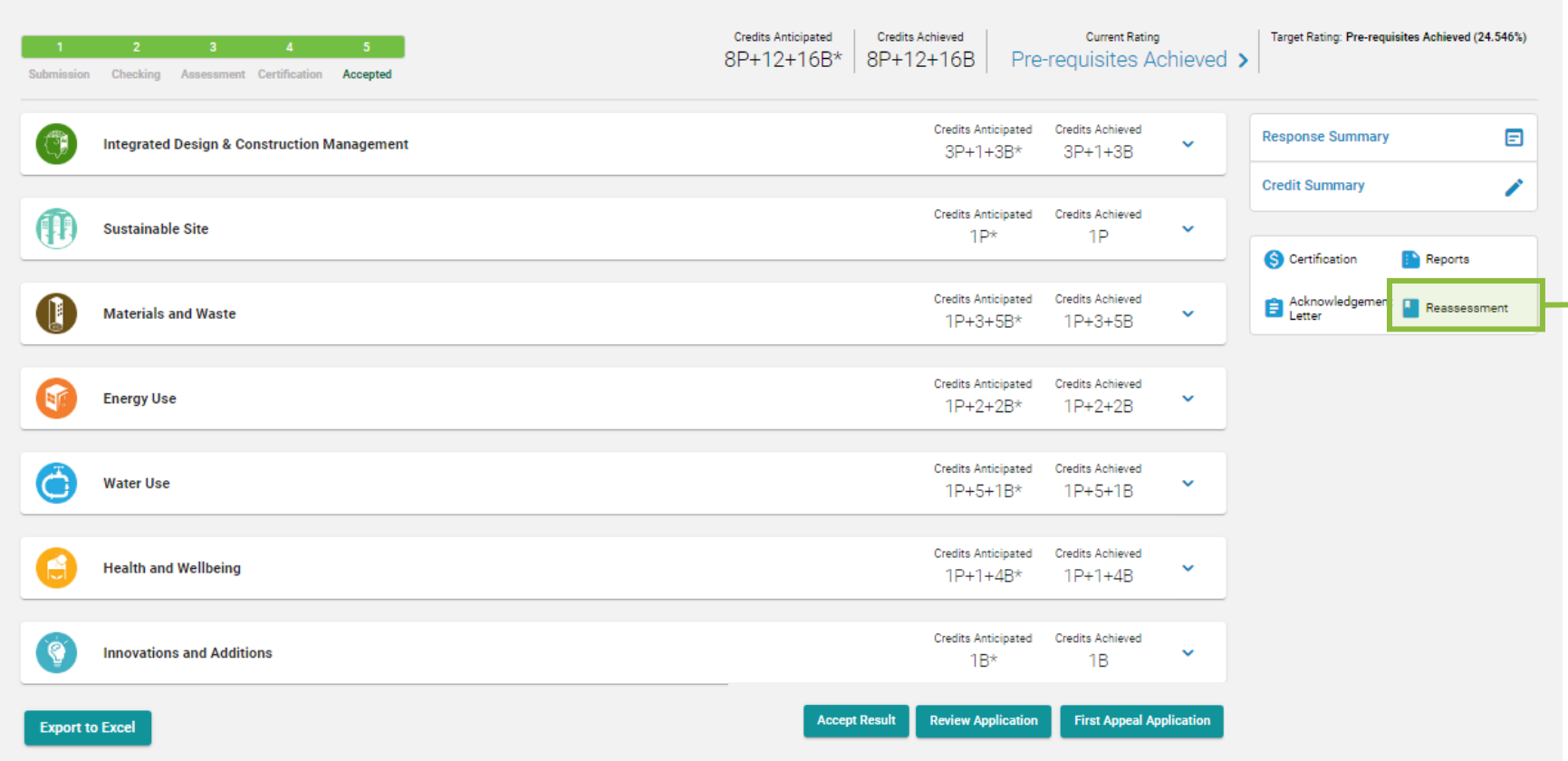
A5.9.19 Acceptance on Assessment Result

(c) Re-assessment



Step 1: Click **Reassessment** to proceed with the re-assessment

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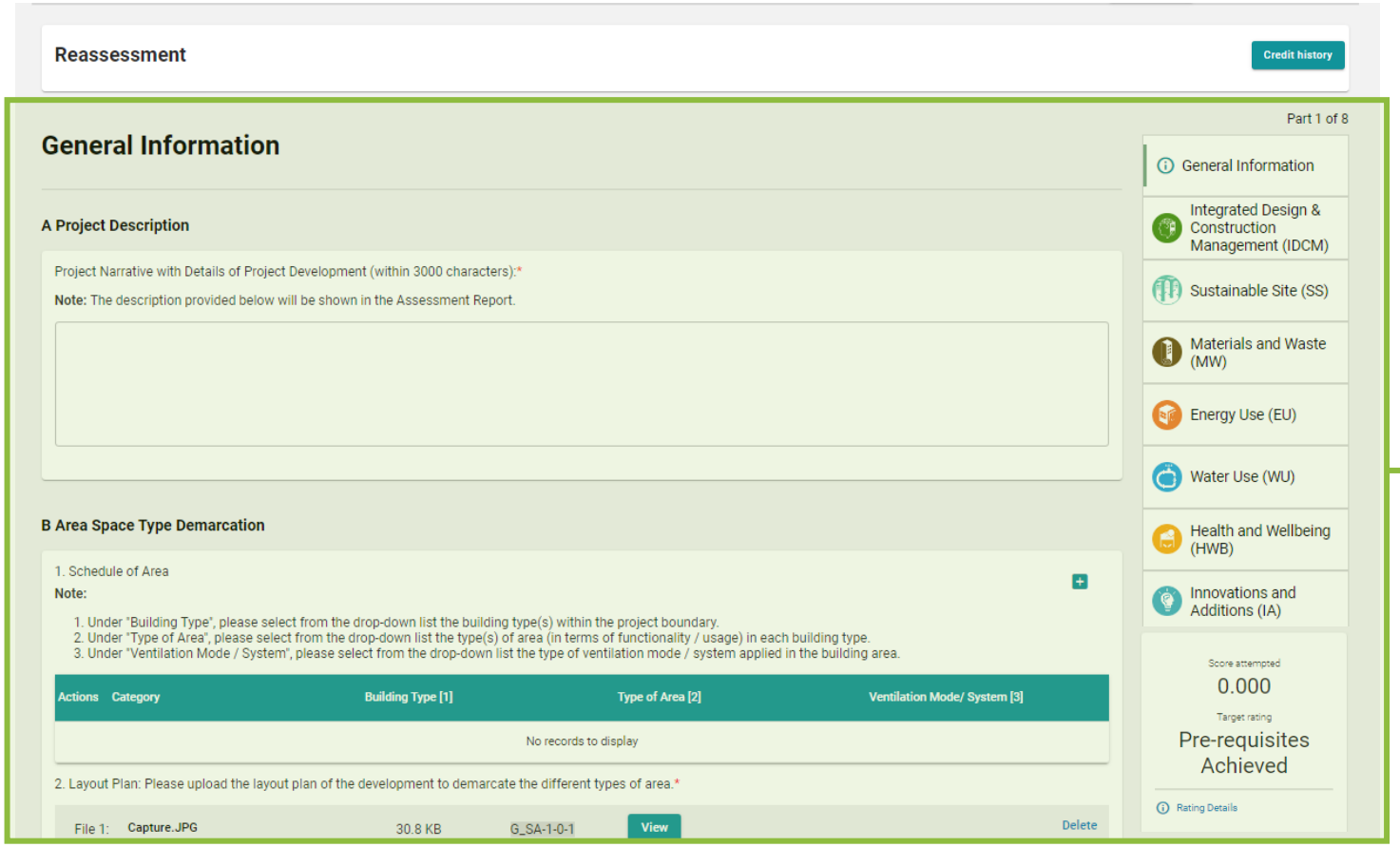
A5.9.20 Acceptance on Assessment Result

(c) Re-assessment



Step 2: Fill in **General Information**
Refer to Section A5.4.2

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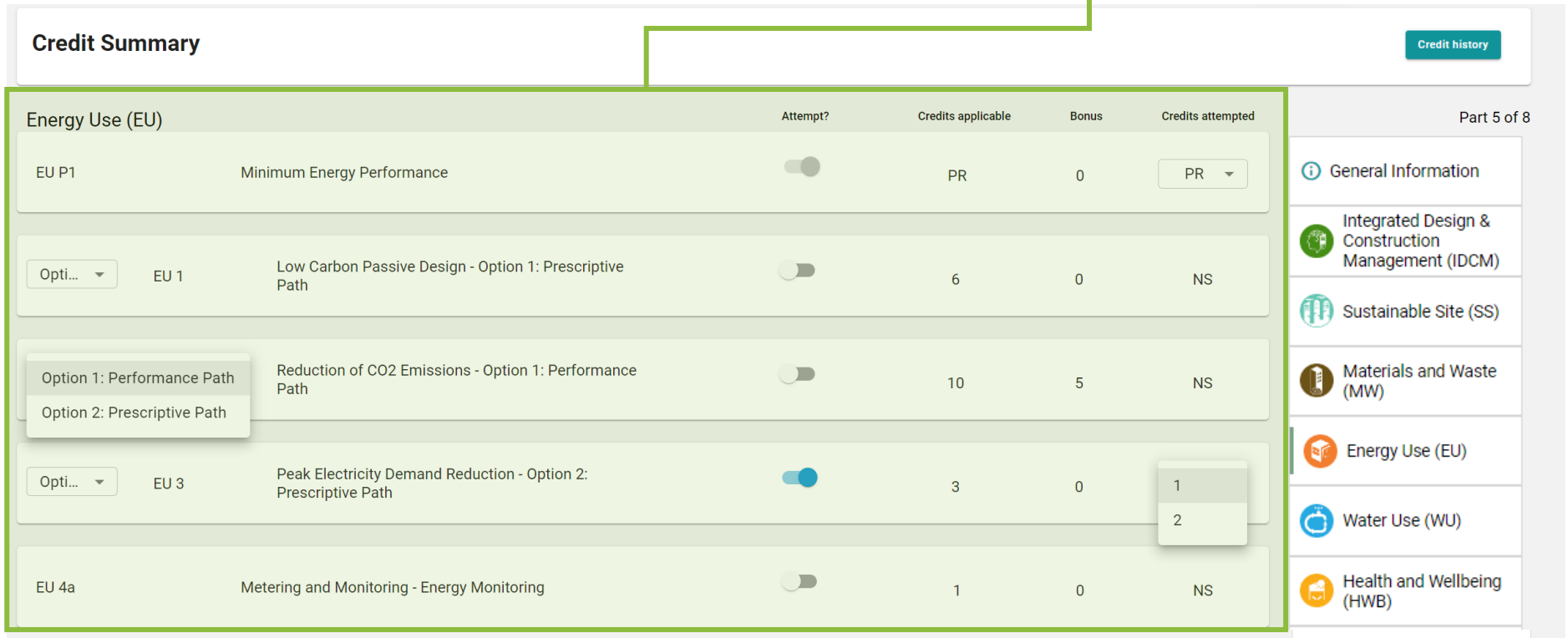
A5.9.21 Acceptance on Assessment Result

(c) Re-assessment

Step 3: Select Credit Attempt for **re-assessment**
Refer to Section A5.4.8



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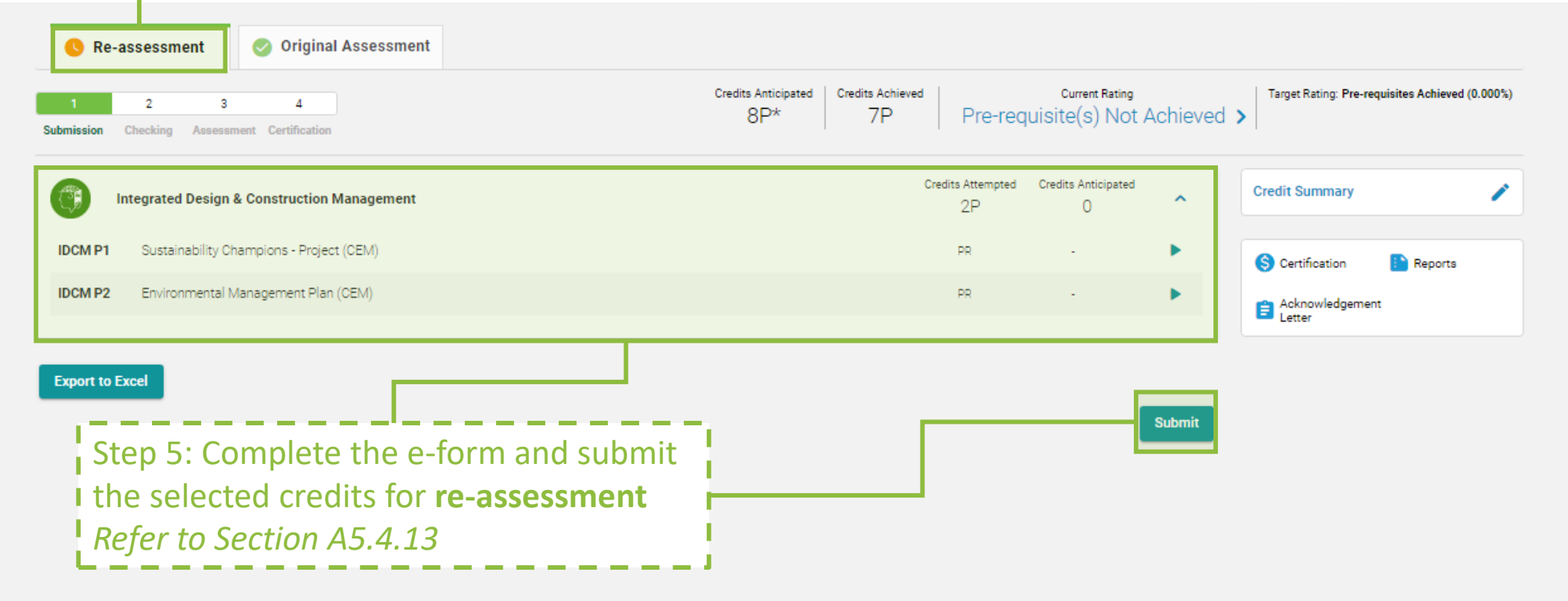
A5.9.22 Acceptance on Assessment Result

(c) Re-assessment

Step 4: Select the re-assessment tab



Step 5: Complete the e-form and submit the selected credits for **re-assessment**

Refer to Section A5.4.13

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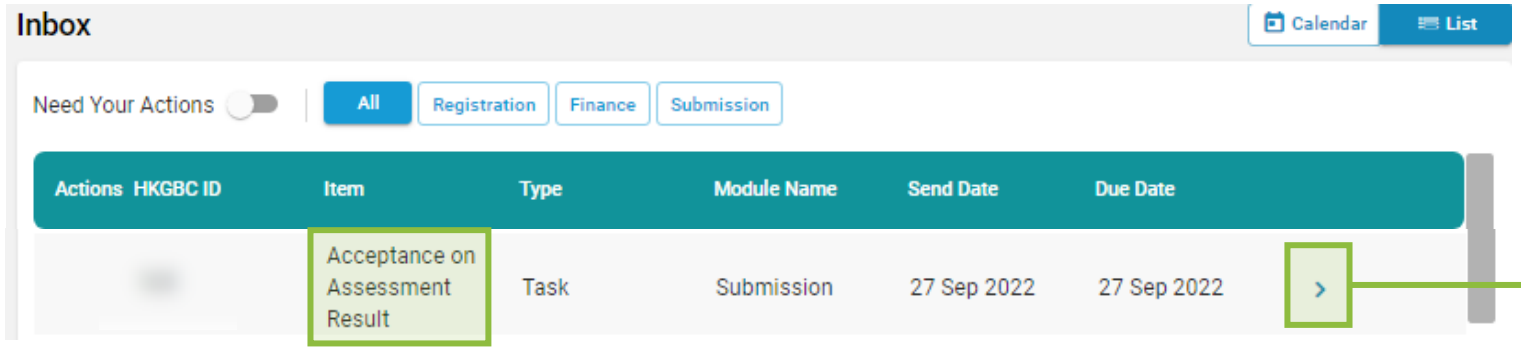
A5.9.23 Acceptance on Assessment Result

(c) Re-assessment



Step 6:
Once the assessment result has been issued, Notification will be shown in the Inbox requesting the Applicant to make an Acceptance on Assessment Result. Click the link provided in the notification to access the project

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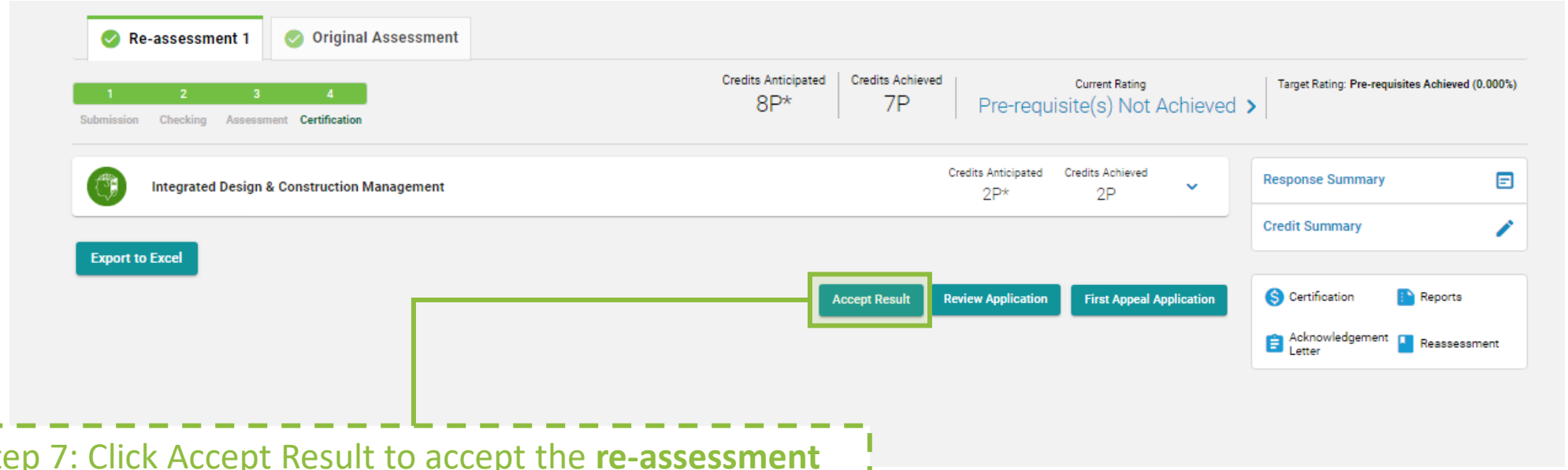
A5.9.24 Acceptance on Assessment Result

(c) Re-assessment



Step 7: Click Accept Result to accept the **re-assessment** result and have the assessment be sent to HKGBC

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Section A6 Enquiry

This section provides the guidance in preparing enquiry on the iBEAM.

A6.1 General Enquiry (without logging in)

A6.2 Project Specific Enquiry

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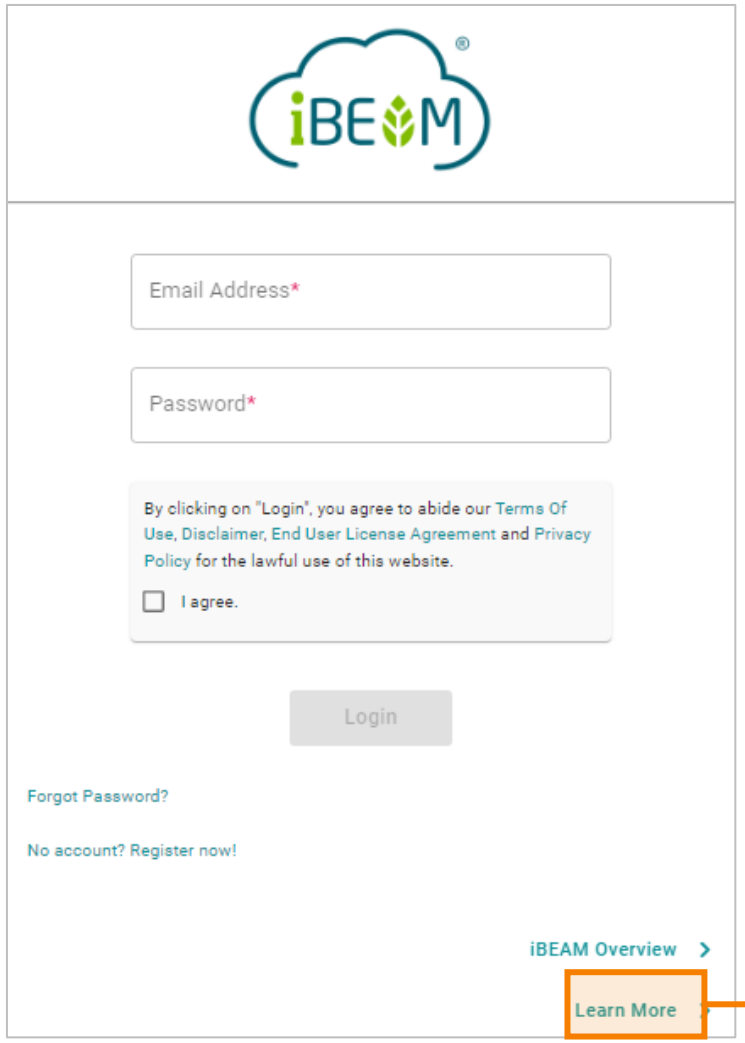
A6.1.1 General Enquiry (without logging in)



Step 1:
Click Learn More

Step 2:
Click **Ask BEAM** to file a new general enquiry

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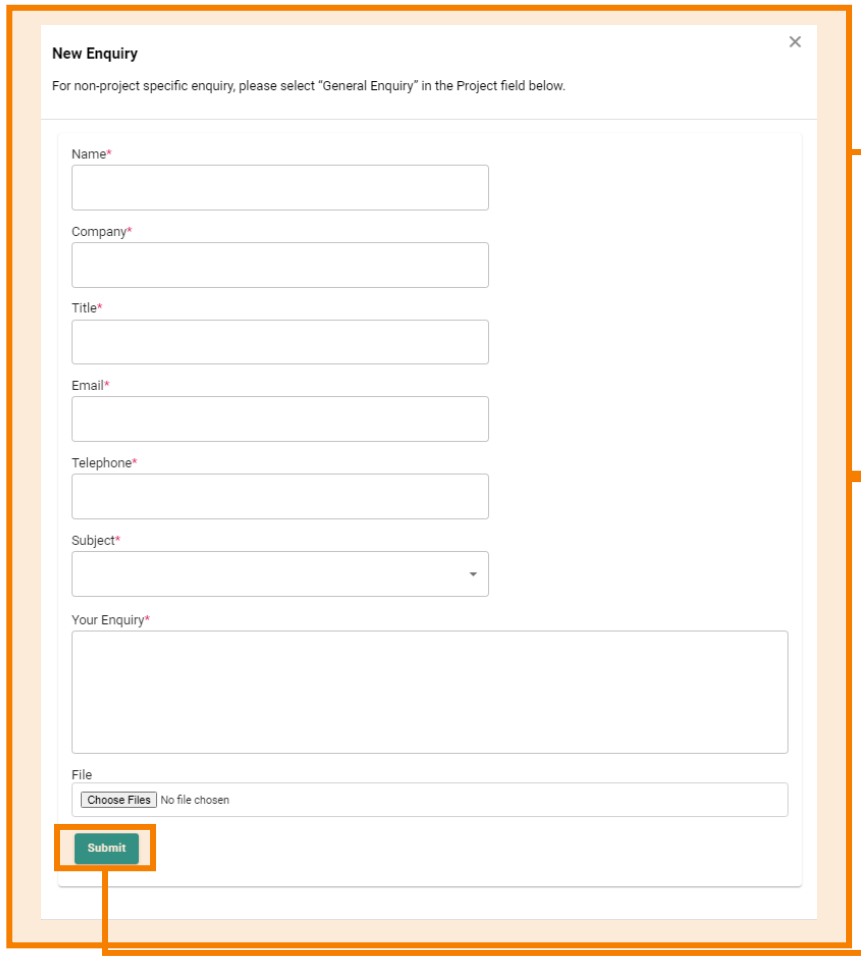
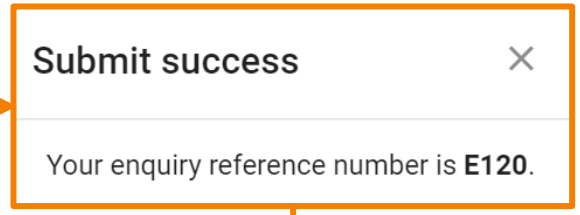
A6.1.2 General Enquiry (without logging in)



Step 3:
A window will pop up.
Complete all fields marked with *

Step 4:
Click **Submit** to submit the enquiry



Step 5:
A message box will pop up confirming the **Success** in submitting the enquiry

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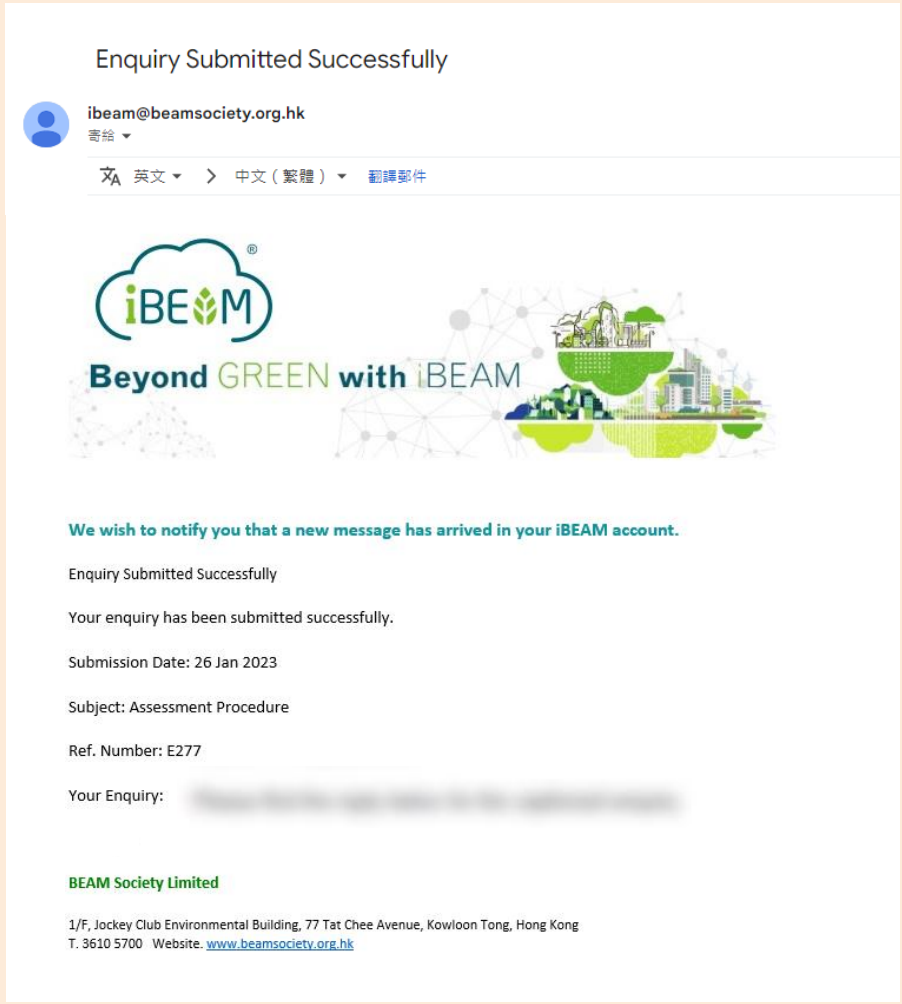
A6.1.3 General Enquiry (without logging in)



Enquiry Submitted Successfully

ibeam@beamsociety.org.hk
寄給

英文 > 中文（繁體） 翻譯郵件

Beyond GREEN with iBEAM

We wish to notify you that a new message has arrived in your iBEAM account.

Enquiry Submitted Successfully

Your enquiry has been submitted successfully.

Submission Date: 26 Jan 2023

Subject: Assessment Procedure

Ref. Number: E277

Your Enquiry:

BEAM Society Limited

1/F, Jockey Club Environmental Building, 77 Tat Chee Avenue, Kowloon Tong, Hong Kong
T. 3610 5700 Website. www.beamsociety.org.hk

Step 6:
A **confirmation e-mail** will be sent to the designated e-mail address confirming BSL's receipt of the enquiry

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A6.1.4 General Enquiry (without logging in)

iBEAM - Enquiry E280

ibeam@beamsociety.org.hk
寄給

英文 > 中文（繁體） 翻譯郵件

Beyond GREEN with iBEAM

We wish to notify you that a new message has arrived in your iBEAM account.

IBEAM - Enquiry E280

Please find the reply below for the captioned enquiry.

Testing

BEAM Society Limited

1/F, Jockey Club Environmental Building, 77 Tat Chee Avenue, Kowloon Tong, Hong Kong
T. 3610 5700 Website. www.beamsociety.org.hk

Step 7:
Once BSL has made a response to the enquiry, a **response e-mail** will be sent to the designated e-mail address

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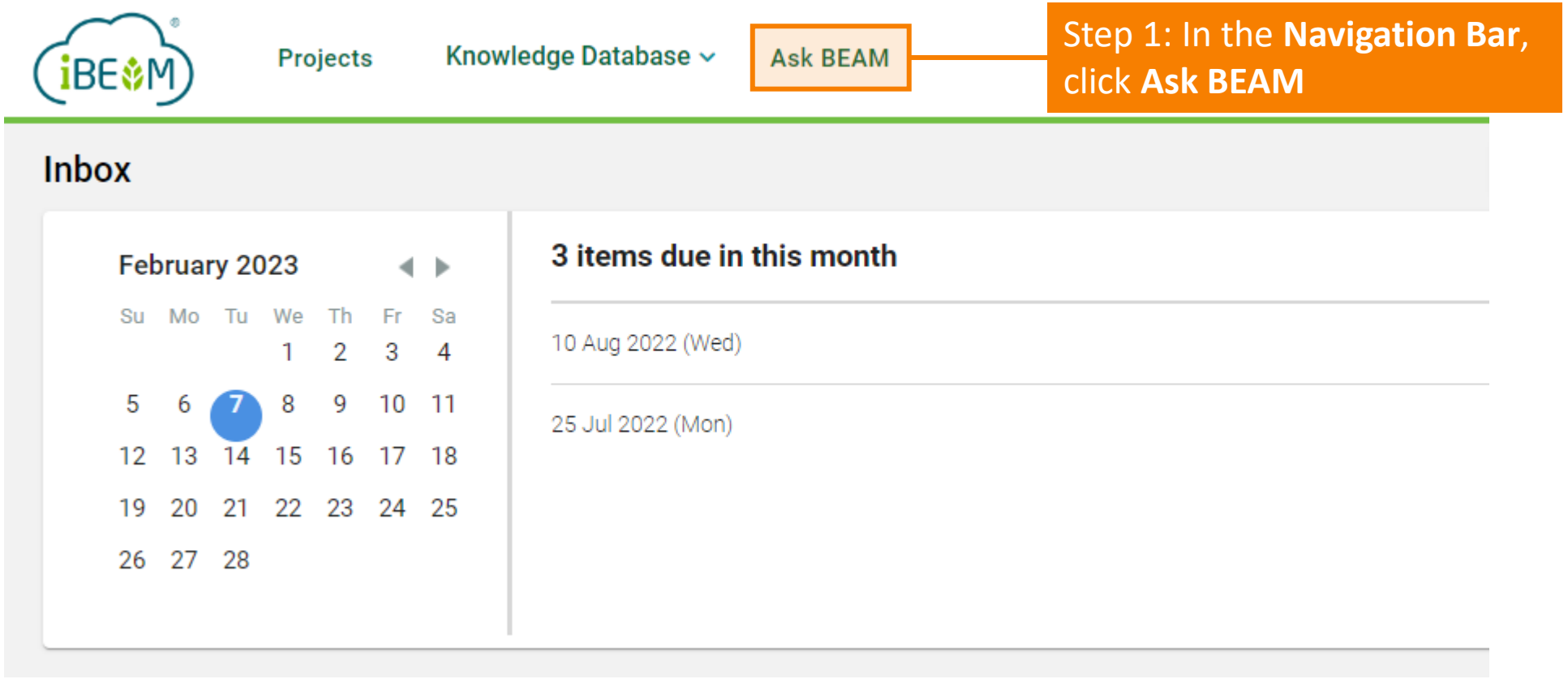
A6.2.1 Project Specific Enquiry



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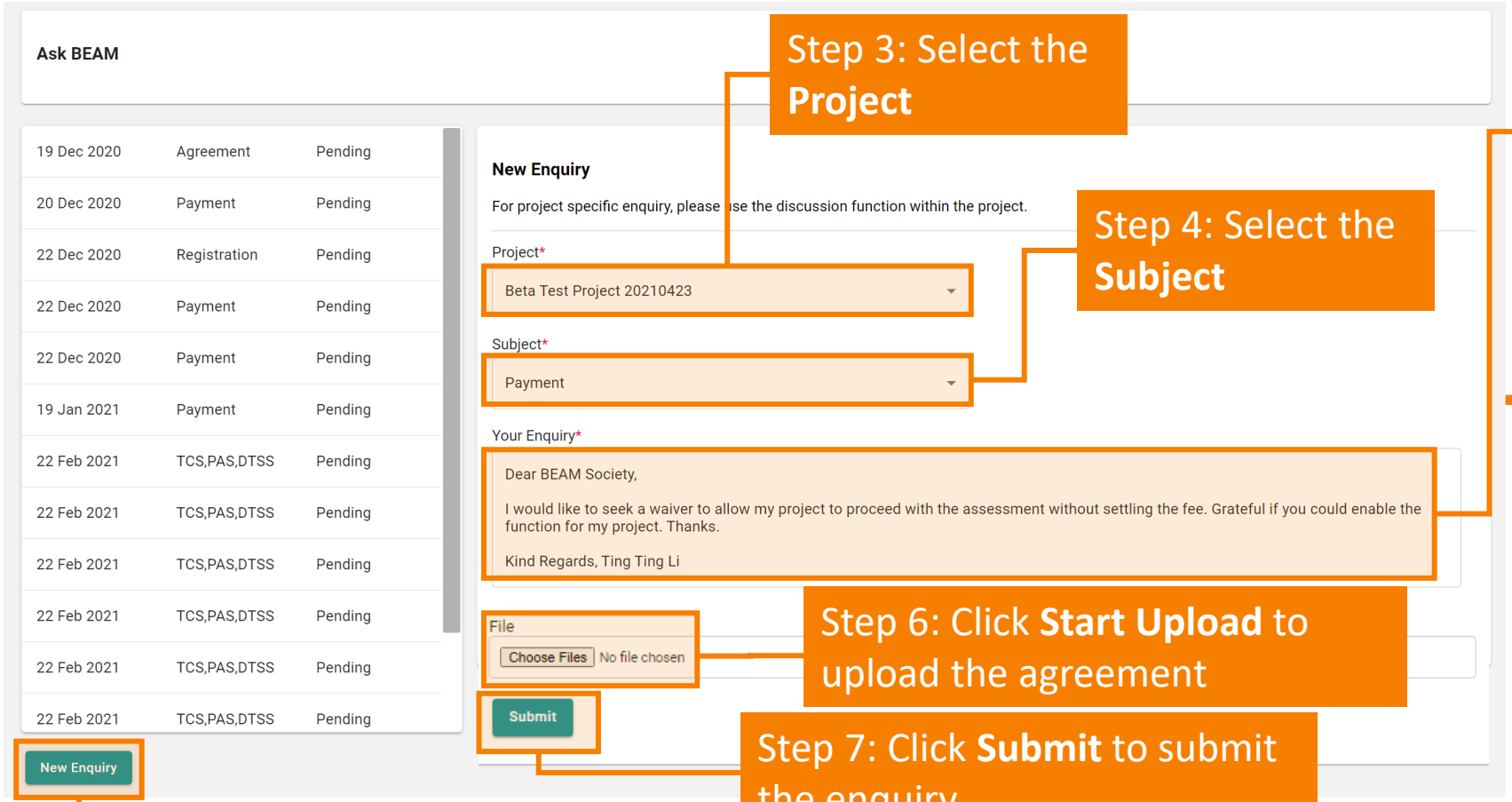
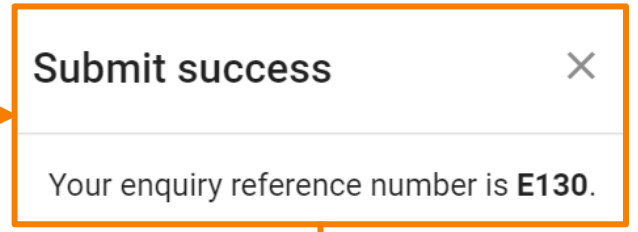
A6.2.2 Project Specific Enquiry



Step 3: Select the **Project**

Step 4: Select the **Subject**

Step 5: Type in the content of the enquiry in the **Your Enquiry** textbox



Step 6: Click **Start Upload** to upload the agreement

Step 7: Click **Submit** to submit the enquiry

Step 8:
A message box will pop up confirming the **Success** in submitting the enquiry

Step 2: Click **New Enquiry** to file a new enquiry

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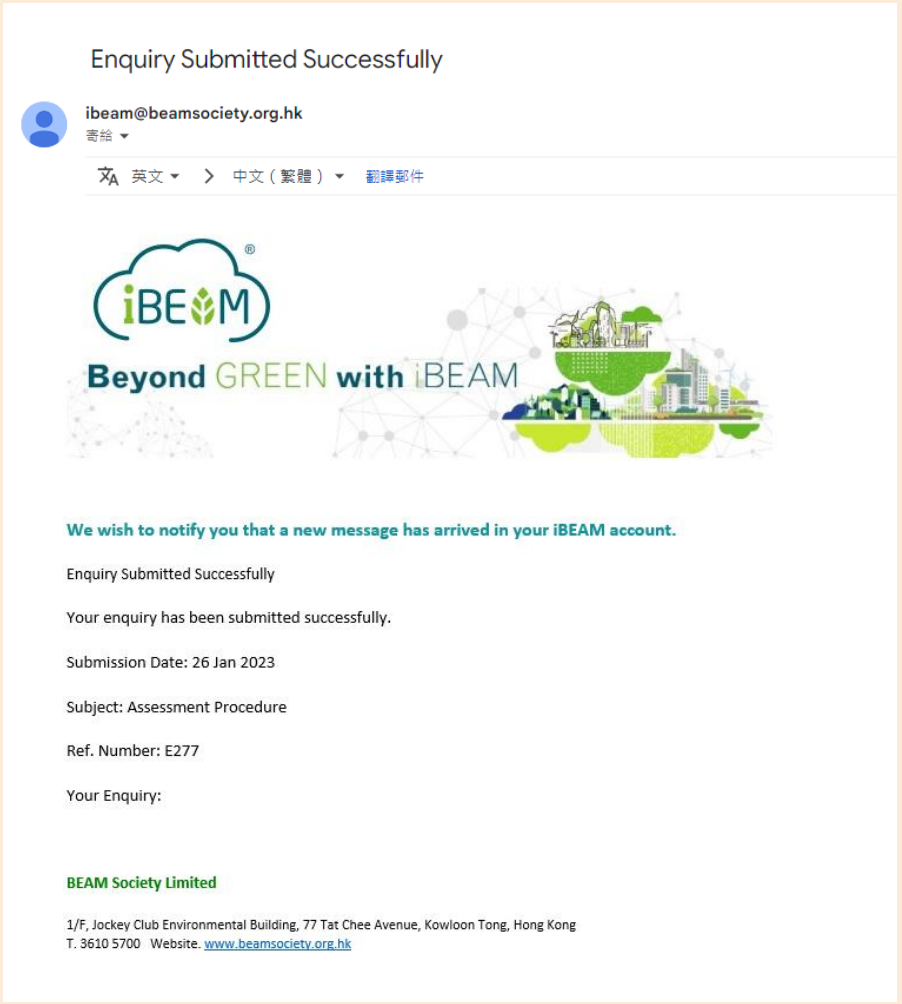
A6.2.3 Project Specific Enquiry



Enquiry Submitted Successfully

ibeam@beamsociety.org.hk
寄給

英文 > 中文（繁體） 翻譯郵件

Beyond GREEN with iBEAM

We wish to notify you that a new message has arrived in your iBEAM account.

Enquiry Submitted Successfully

Your enquiry has been submitted successfully.

Submission Date: 26 Jan 2023

Subject: Assessment Procedure

Ref. Number: E277

Your Enquiry:

BEAM Society Limited

1/F, Jockey Club Environmental Building, 77 Tat Chee Avenue, Kowloon Tong, Hong Kong
T. 3610 5700 Website. www.beamsociety.org.hk

Step 9:
A **confirmation e-mail** will be sent to the designated e-mail address confirming BSL's receipt of the enquiry

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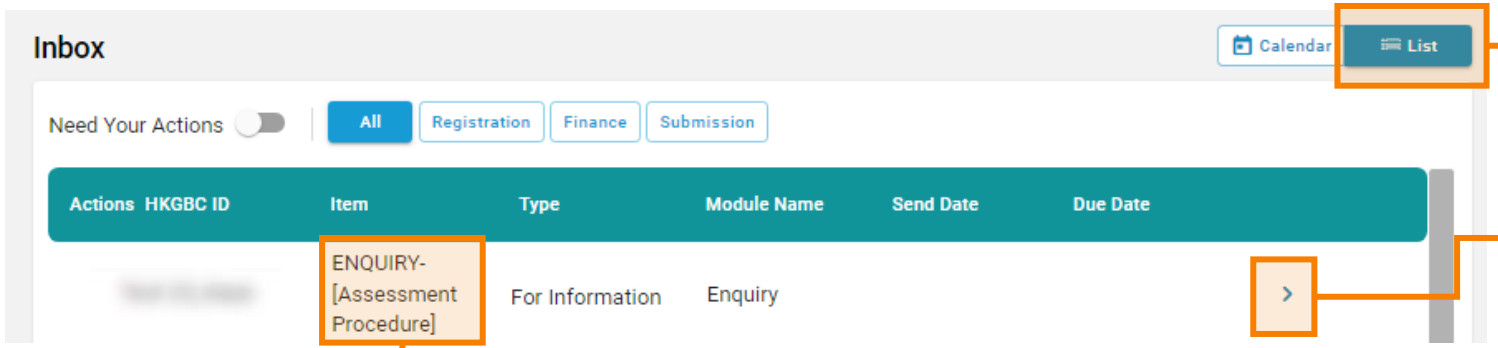
A6.2.4 Project Specific Enquiry



Step 10:
In the **Account Dashboard**, click **List** view under **Inbox**

Step 11:
Once then enquiry has been answered, **Notification** will be shown in the **Inbox** notifying the Applicant to review **the Response** of the enquiry. Click the link provided in the notification to access the project

Tips:

For enquiry response that requires the review of the Applicant, the identity of **Enquiry** will be shown under **Item**.

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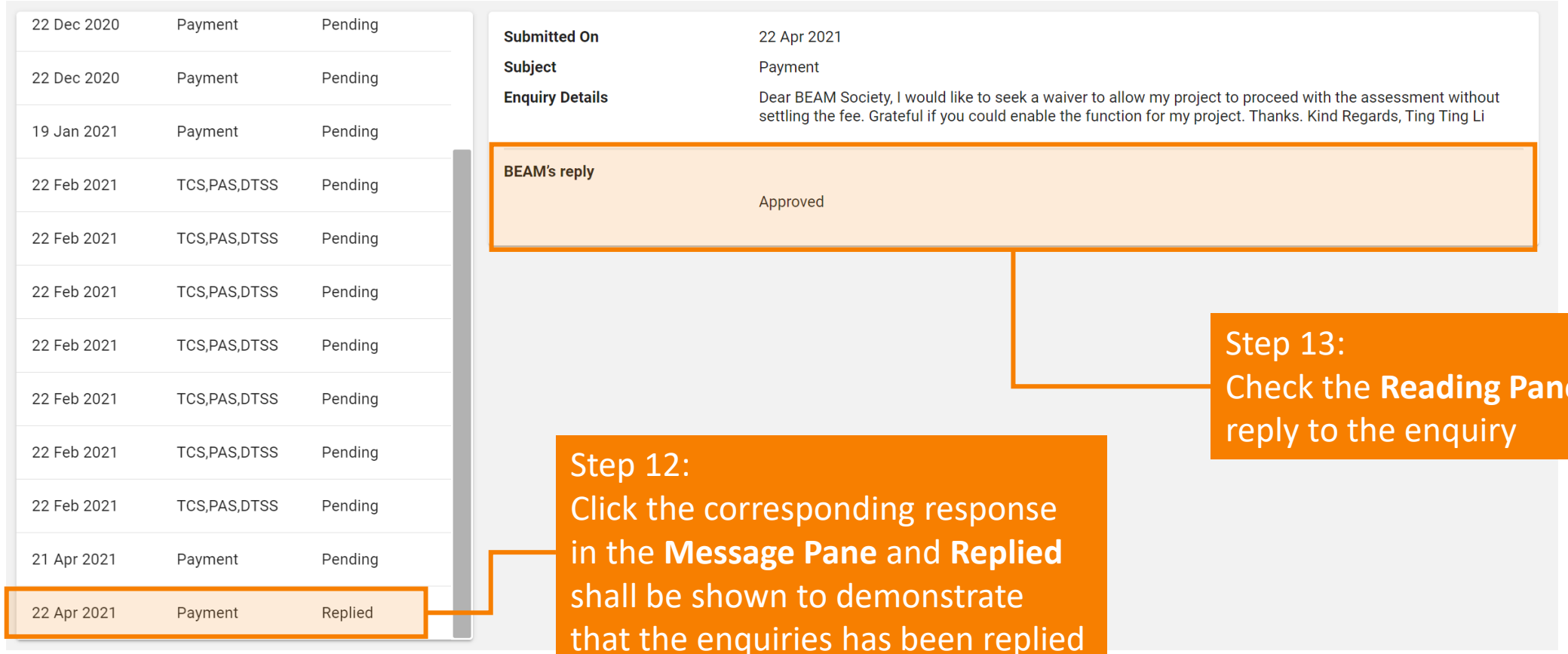
A6.2.5 Project Specific Enquiry



Step 12:
Click the corresponding response in the **Message Pane** and **Replied** shall be shown to demonstrate that the enquiries has been replied

Step 13:
Check the **Reading Pane** to read the reply to the enquiry

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Section A7 Knowledge Database

This section provides an overview of the different functions on the iBEAM knowledge database.

A7.1 Sample Form

A7.2 Self-Assessment

A7.3 Credit Library

A7.4 Download Area

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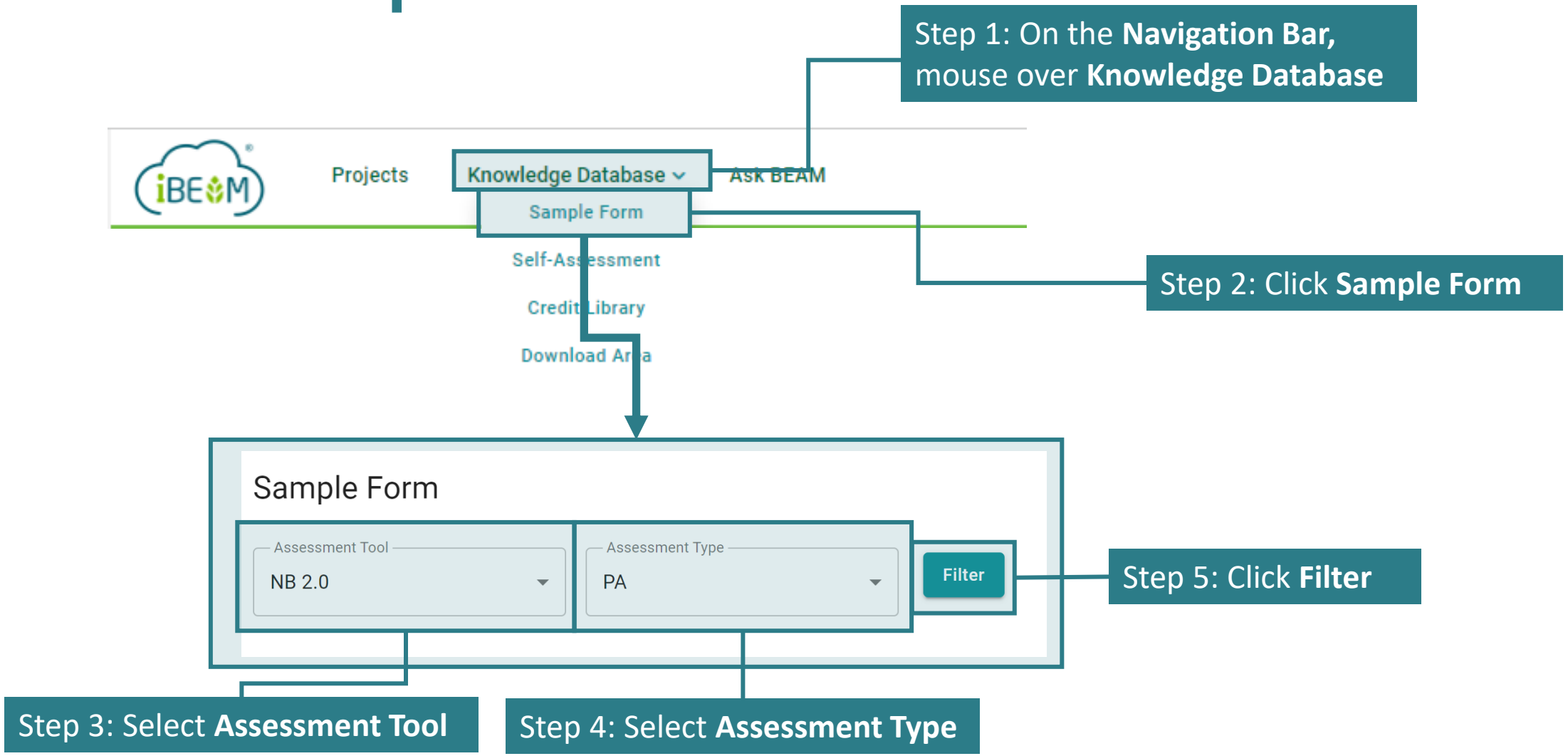
A7.1.1 Sample Form



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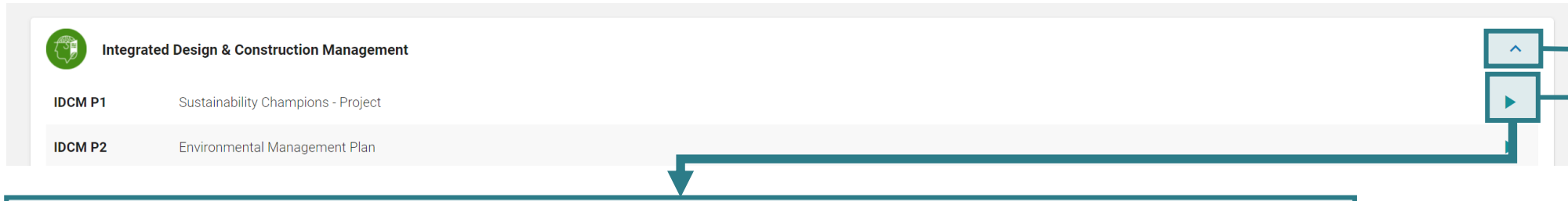
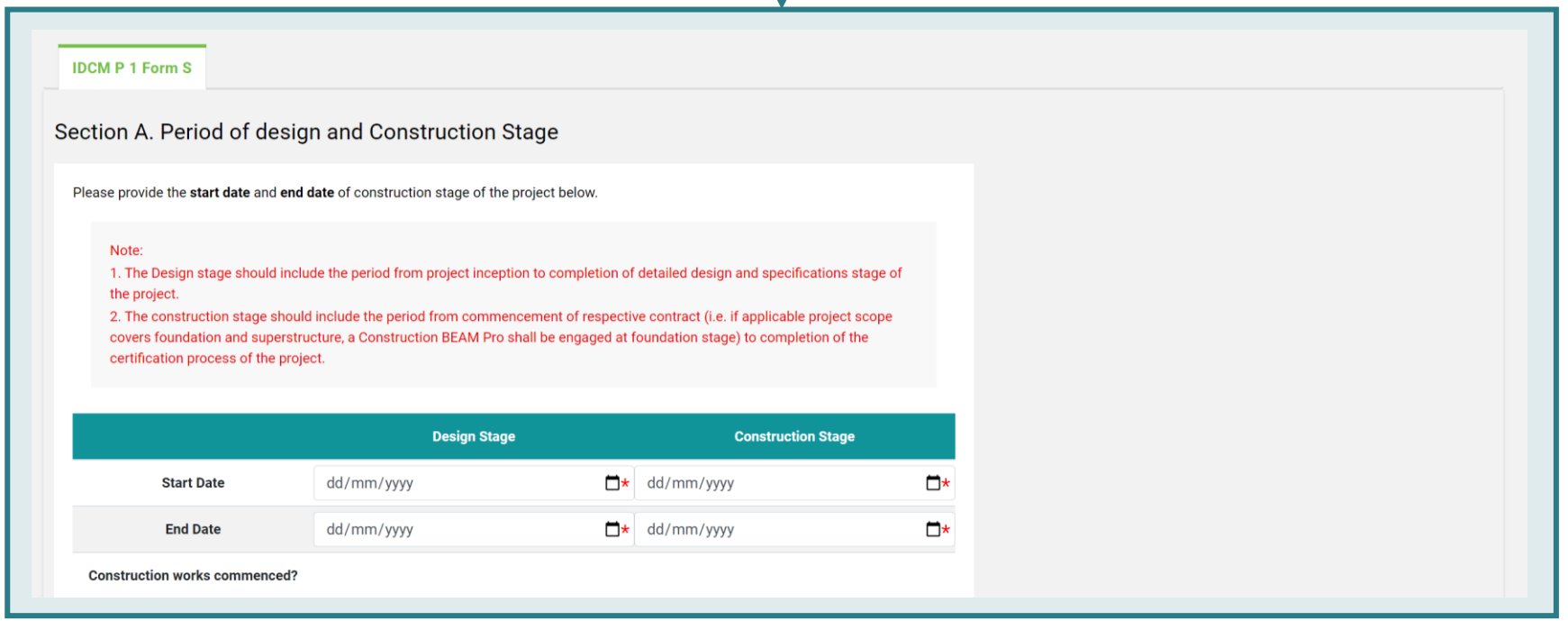
A7.1.2 Sample Form



Step 6: Click ⌄ to access the detail credit information to each Aspect

Step 7: Click ▶ to access the e-Form of the corresponding credits



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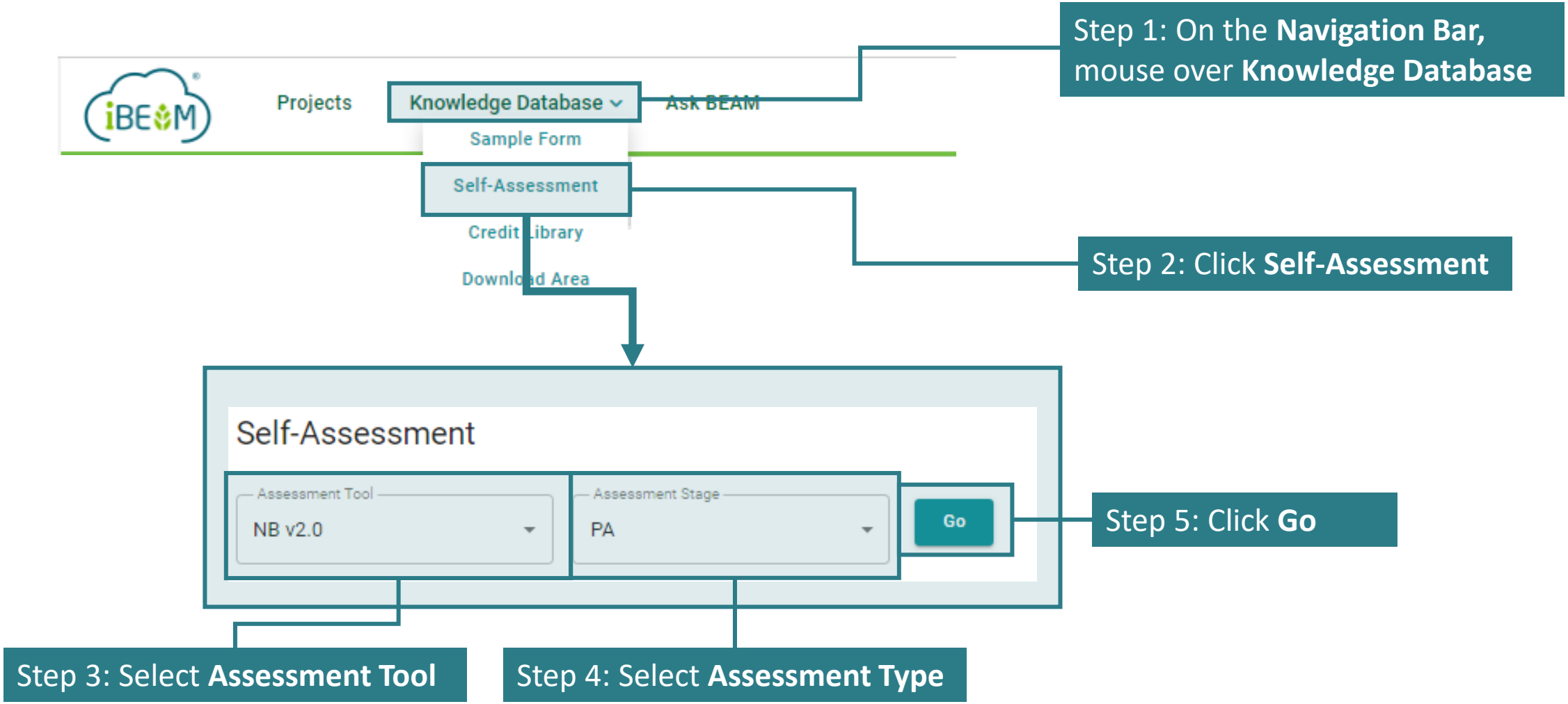
A7.2.1 Self-Assessment



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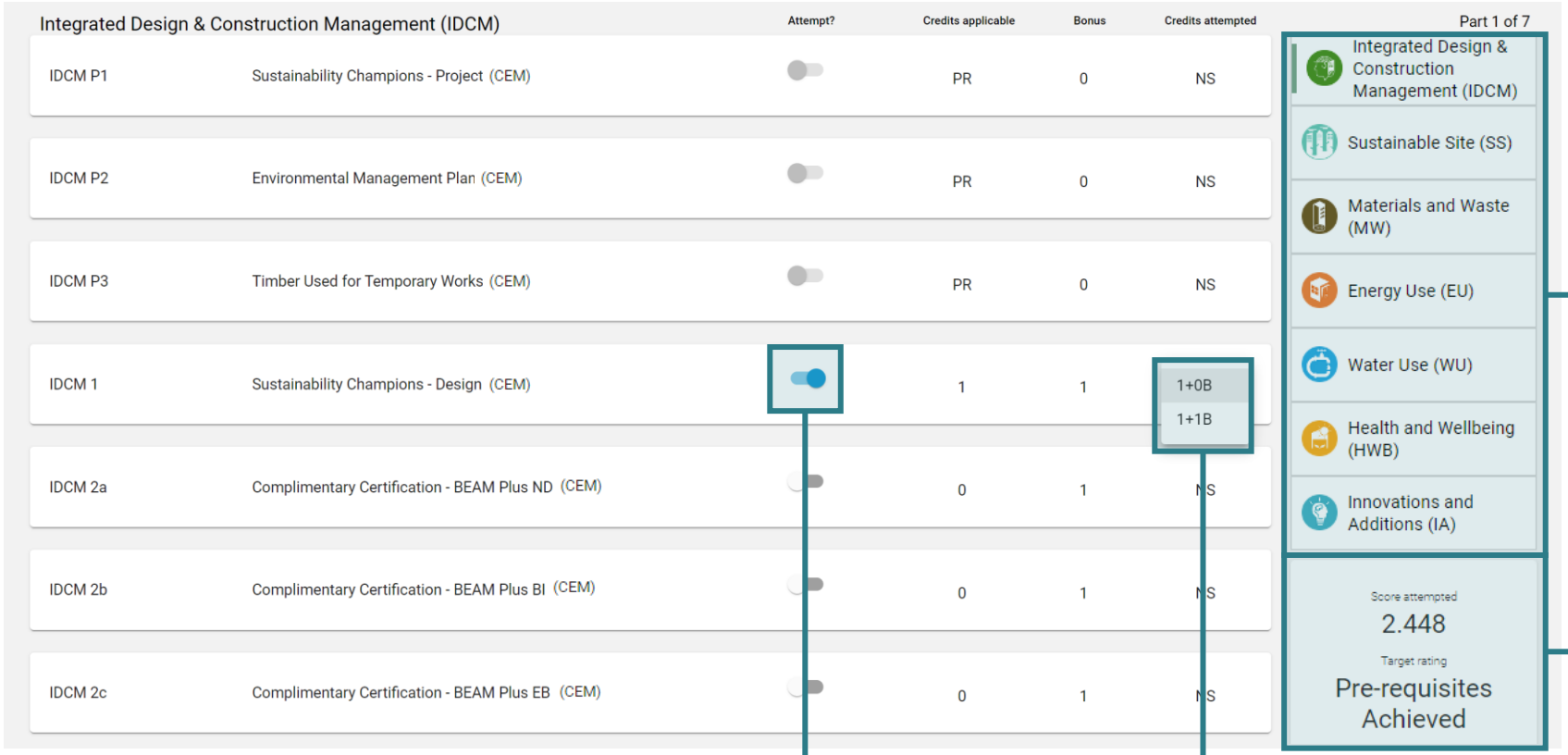
A7.2.2 Self-Assessment



Step 8 (Optional):
Click the different **Aspect** to change Aspect

Step 9: The **Score Attempted** and **Target Rating** will change based on the selection under *Step 6 to 7*

Step 7: Select the **Credit Scoring** for the attempted credit items

Step 6: Select the **Credit Attempt**

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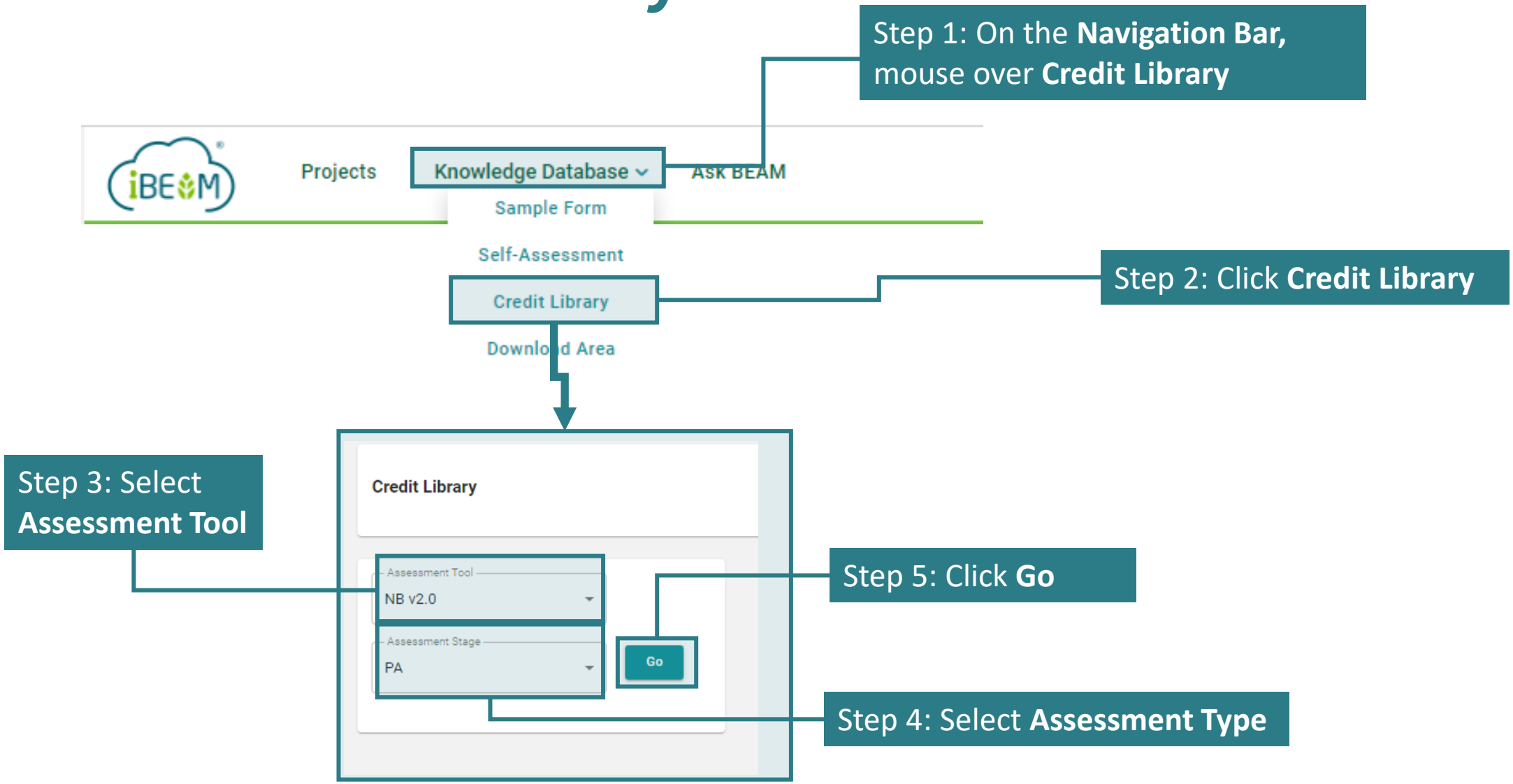
A7.3.1 Credit Library



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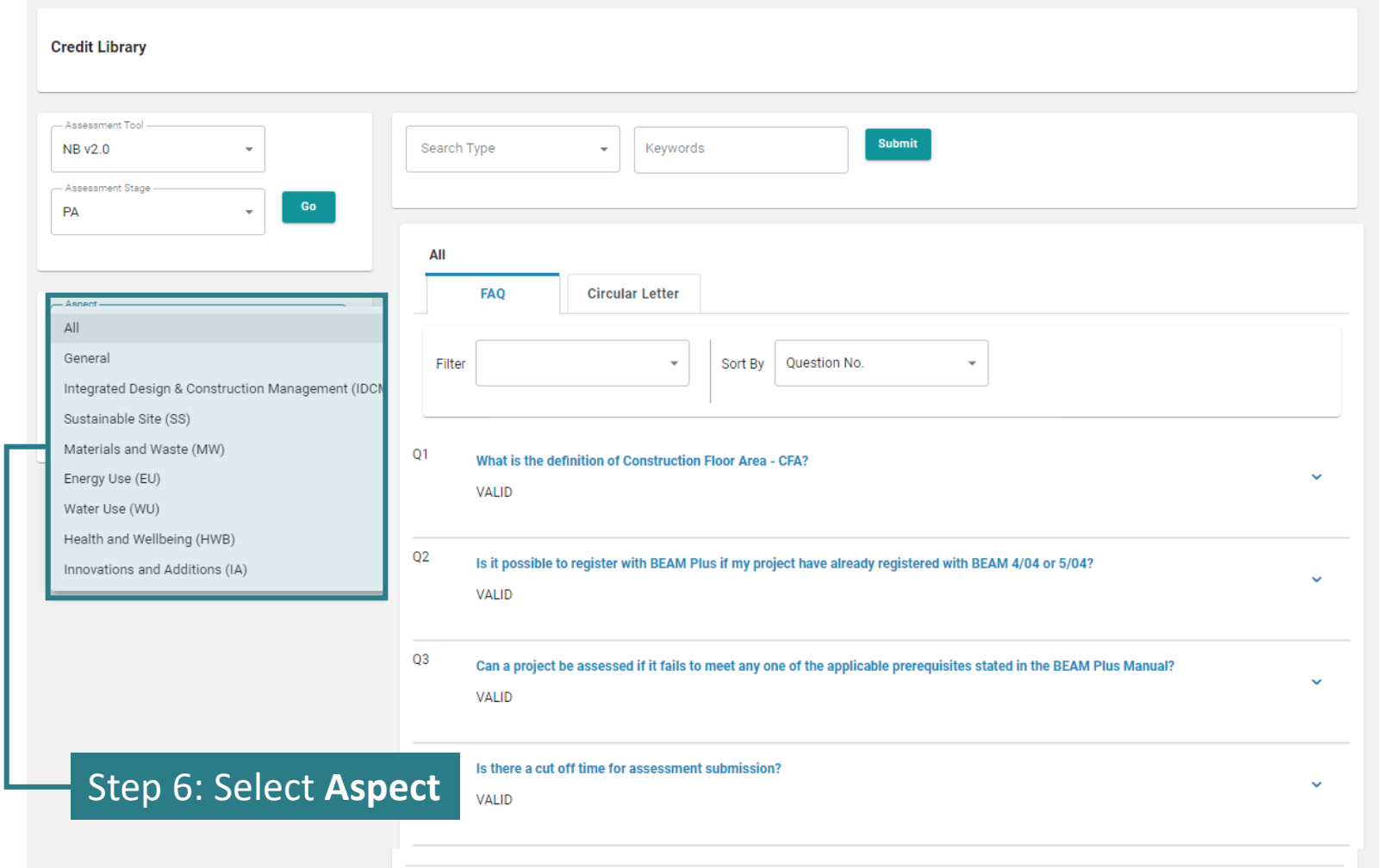
A7.3.2 Credit Library



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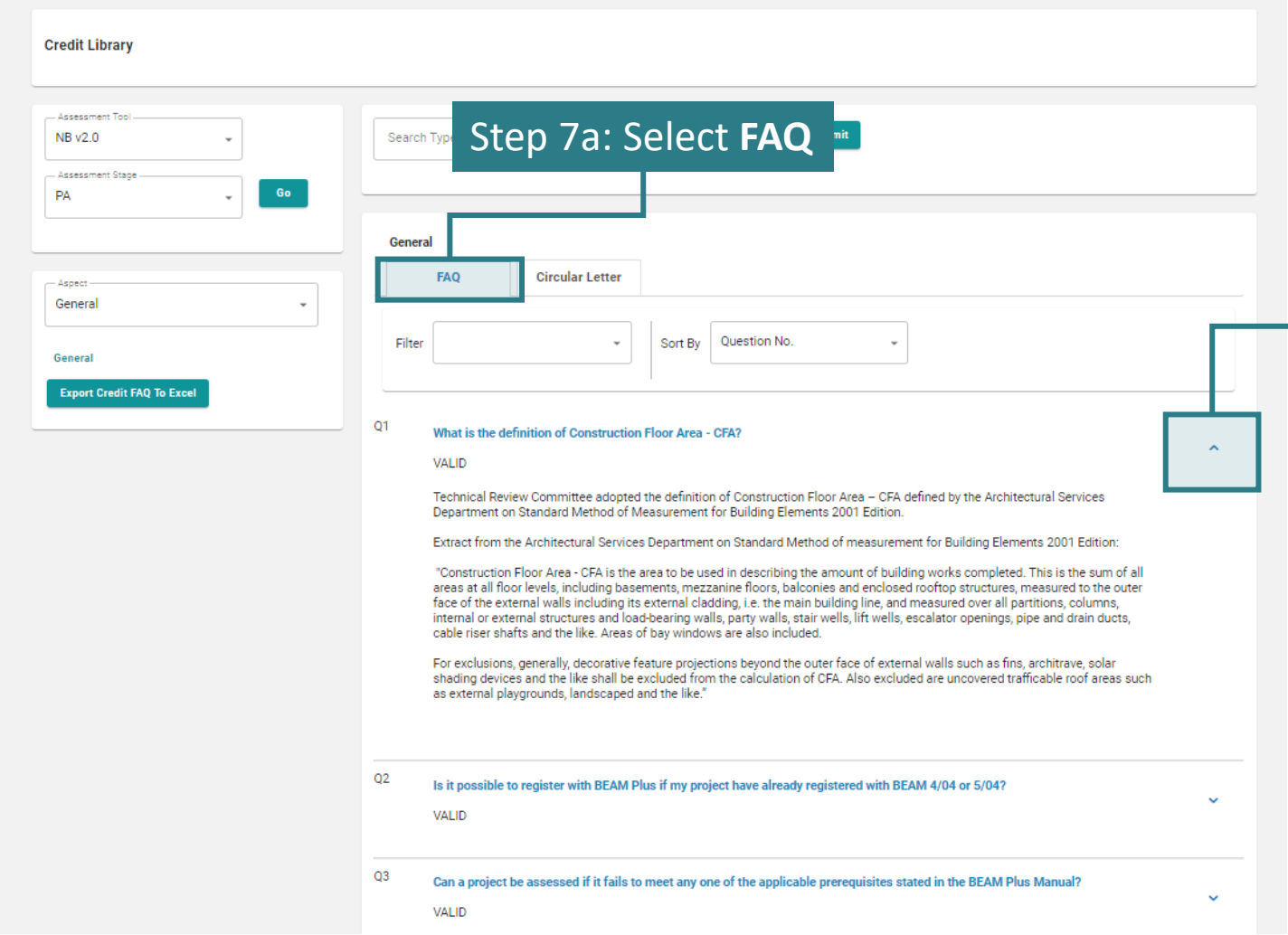
A7.3.3 Credit Library



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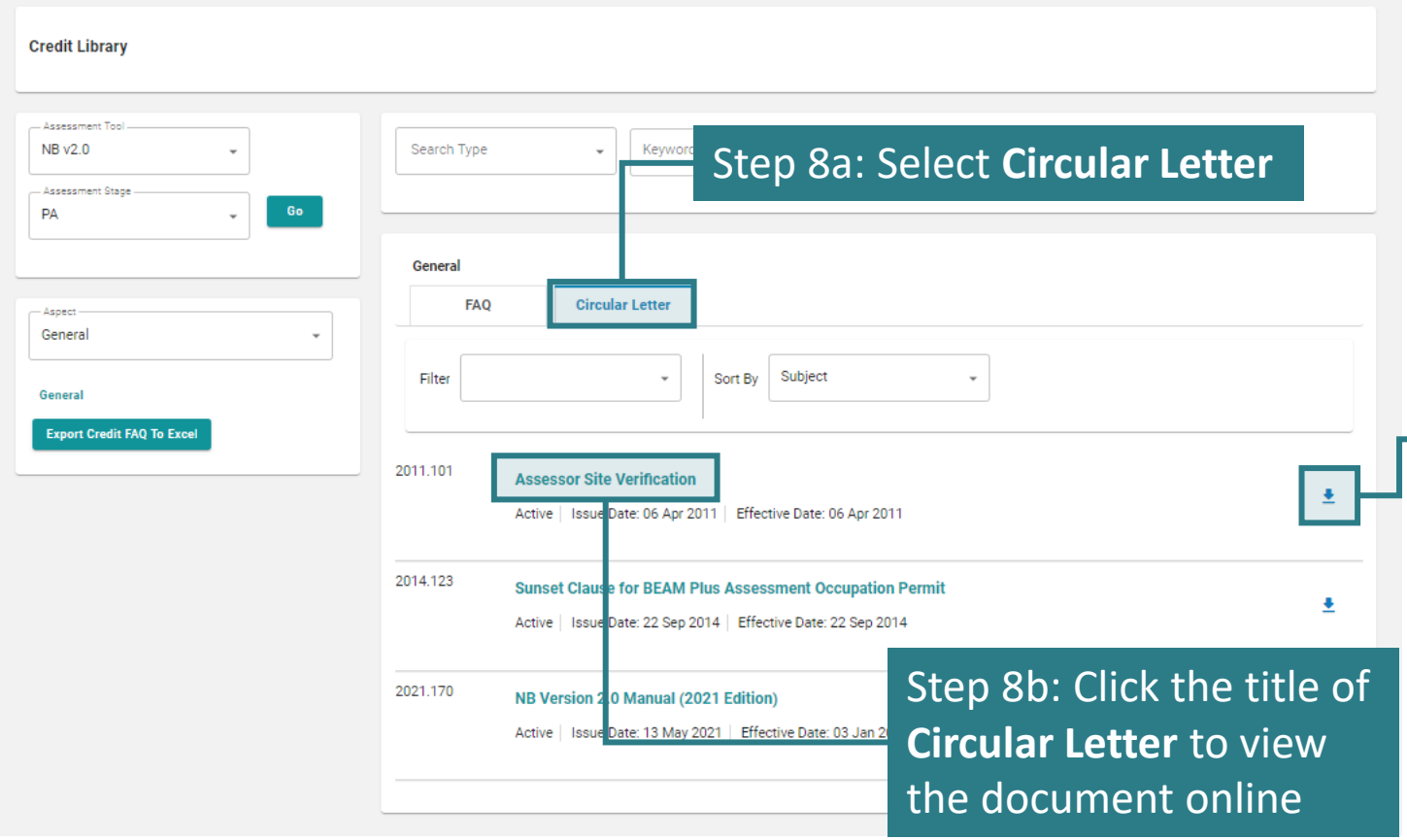
A7.3.4 Credit Library



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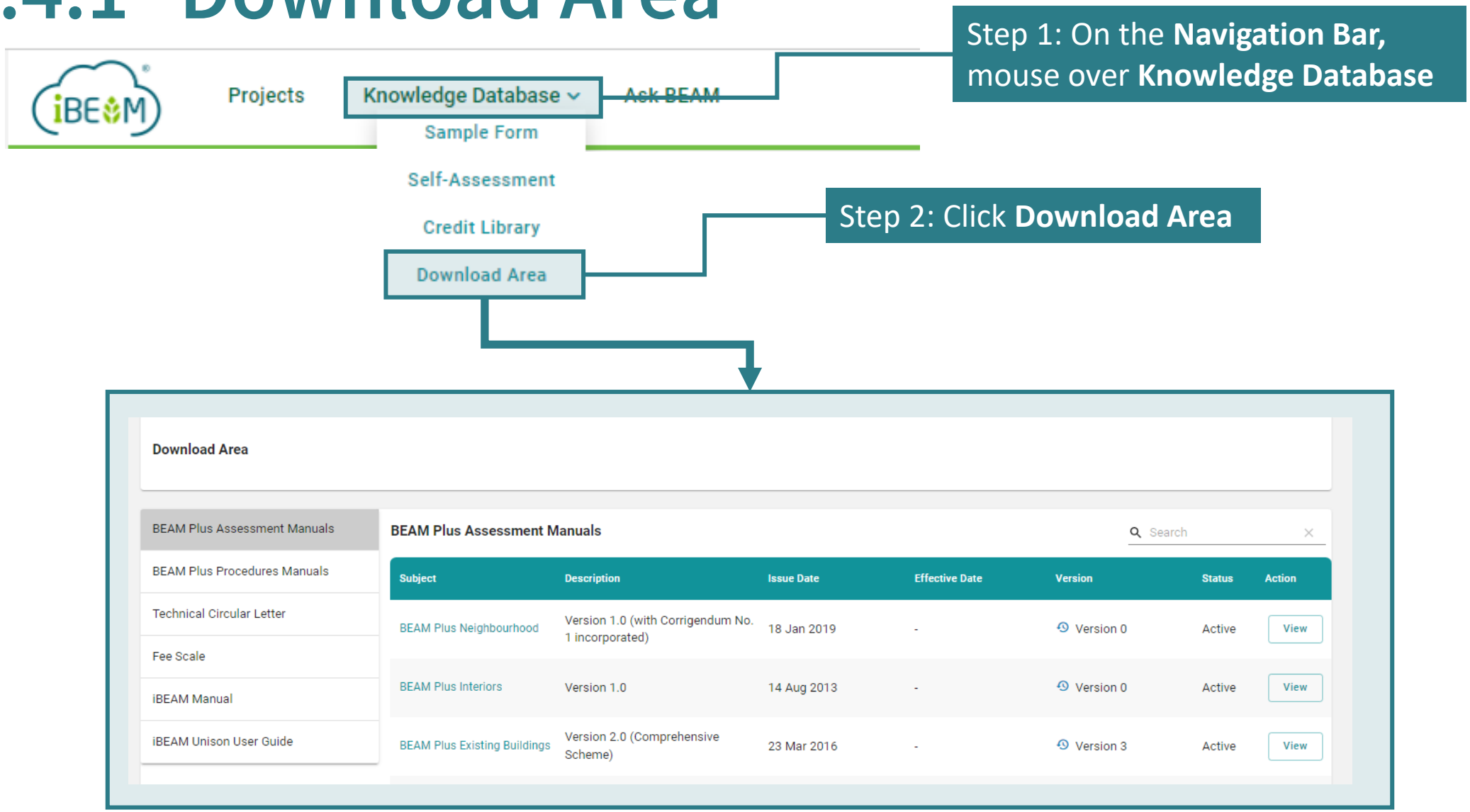
A7.4.1 Download Area



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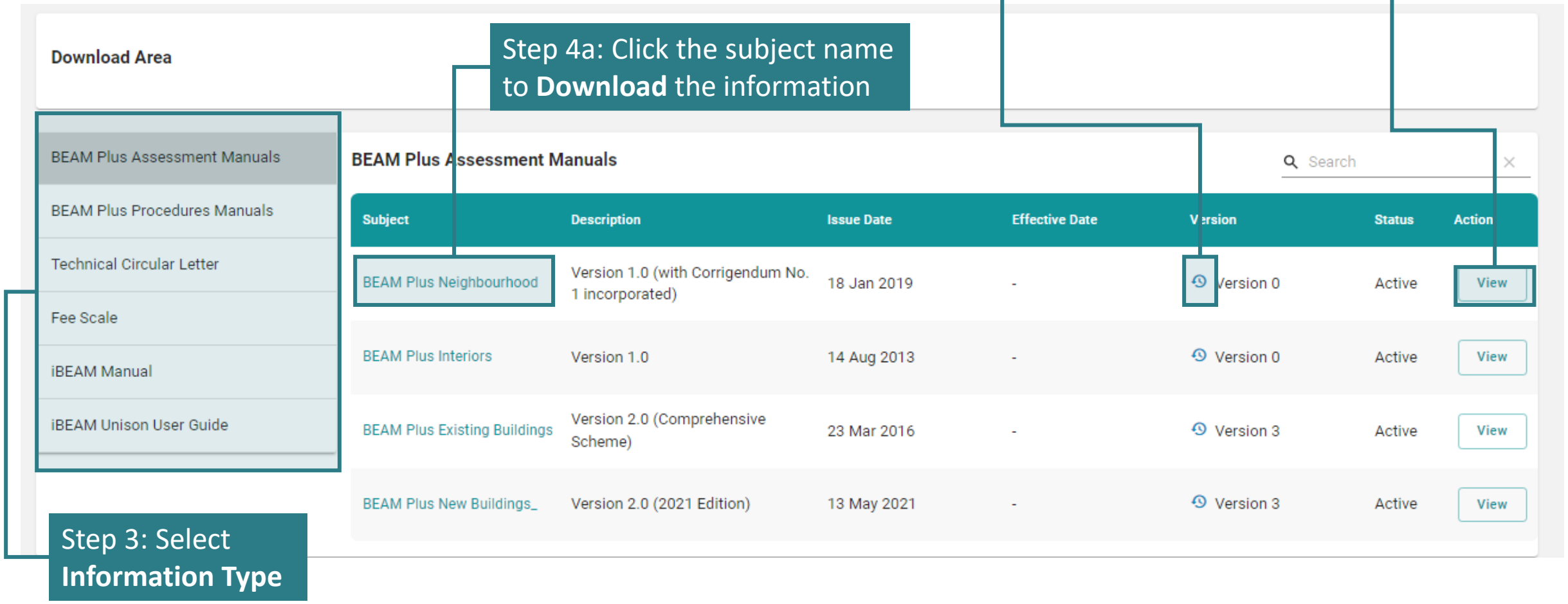
A7.4.2 Download Area



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Appendix A Data Dictionary (General Functions)

This section provides the definition of common terminology adopted for the general functions of iBEAM.

A-1 General Functions

A-2 Operational Functions

A-3 Assessment Functions

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A-1.1 Data Dictionary

General Functions

Functional Classification	Field Name	Definition	Reference Sections
General	*Aspect*	Assessment categories as defined by the corresponding assessment tools	-
General	User	Any person operating on the iBEAM	-
Account Dashboard	HKGBC Project No	Unique project ID assigned by Hong Kong Green Building Council (HKGBC) to a project	-
Account Dashboard	Assessment ID	Unique project ID assigned by iBEAM to a project	-
Account Dashboard	Project	Unit of BEAM Plus assessment created either on iBEAM and synchronised from HKGBC database	A1.4

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A-1.2 Data Dictionary

General Functions

Functional Classification	Field Name	Definition	Reference Sections
Credit Summary	Pre-Assessment Summary	System generated excel template summarizing the credit requirement, credit attainable, credit attempted and anticipated rating for the submission	A1.6,A1.6.1, A1.6.2.1, A1.6.3.1, A1.6.3.2.1, A1.6.4, A1.6.5
Credit Summary	Submission	e-Forms, drawings, calculations or any other being data uploaded by the Applicant onto iBEAM for the purpose of assessment	A5, B3.6.3
Credit Summary	Assessment Report	Report of the BEAM Plus assessment generated by the system based on the result generated from iBEAM	A1.5.2.3, A1.6.4, A5.9.4
Credit Summary	Acknowledgement Letter	Letter generated by iBEAM acknowledging the completion of certain stages of the BEAM Plus assessment	A1.6.4, A5.9.2, C1.7L.16, C1.7L.17
Login	Account	Unit of user record on iBEAM	A1.2, A2, A1.4
Navigation Bar	Post	Classification of job function on iBEAM	A1.3

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A-1.3 Data Dictionary

General Functions

Functional Classification	Field Name	Definition	Reference Sections
e-Form	Additional Information	Optional information submitted by the Applicant to justify the compliance of the credit	A1.7.2, A1.7.2.4
e-Form	Documentary Readiness	Programming logic built into the e-Form to check the sufficiency of documents submitted for the credit assessment	A1.7.2
e-Form	Excel Template	Appendix forms of certain credit used for the purpose of reporting detailed data items and/or calculation to support for the credit assessment	A1.7.2.2.1
e-Form	File Designation	File identify given by iBEAM to illustrate certain data requirement on the system	A1.7.2.2.1
e-Form	Folio	Index of folders provided on iBEAM to store files uploaded by system Applicant	A1.7.2.2.1, A1.7.2.2.1.2, B3.6.3, B3.6.5
e-Form	Pre-approved Condition	Function that enables the Applicant to override the documentary readiness check in the e-Form due to the special circumstances of the assessment	A1.7.2.3, A5.4.15
e-Form	Versioning	Unique version identify given to individual e-Form for the purpose of identifying the effective date and inactive date of the individual e-Form	A1.7.2.2.1.2, A7.4.2

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A-1.4 Data Dictionary

General Functions

Functional Classification	Field Name	Definition	Reference Sections
Project Member Management	Owner	User that owns a particular project on iBEAM and is given full access to information for the project	A5.3.2
Project Member Management	Project BEAM Pro	Designated BEAM Pro given the right to make a submission for an assessment on iBEAM	A5.3.2
Project Member Management	Active Project User	User that occupies the project on a routine basis and is given the right to manage information in a submission	A5.3.2
Project Member Management	Project Users (Read-only)	User that occupies the project on an occasional basis and is given the right to read the for the project	A5.3.2

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A-1.5 Data Dictionary

General Functions

Functional Classification	Field Name	Definition	Reference Sections
Process Flow	BAS Comments	Comments raised by the BAS from a professional checking on the technical data provided in the submission	A5.6
Process Flow	Post TRC Comments	Final comments issued on the submission based on the findings by the Assessment Authority	A5.7
Process Flow	Pre-Submission	Submission being prepared for BEAM Plus assessment	A5.4
Process Flow	Reporting	Process of exercising adjudication and professional judgement on the submission by the BAS and Assessment Authority for the determination of scoring of the assessment	C1.4A.16
Process Flow	Response Summary	Summary of responses to comments issued by BSL made by the Applicant	A5.5.17, A5.5.18 A5.8.12
Process Flow	Result Issuance	Outcome of the assessment issued after the completion of the BEAM Plus assessment process	C1.7H, C1.7I
Process Flow	Technical Readiness	Technical issues raised on the submission regarding the correctness and appropriateness of information provided in the assessment submission	A1.6.1, C1.2
Process Flow	First Appeal	First Appeal on an individual credit if Applicant disagree to and/ or do not accept the decision made by the BSL	A5.9.13, A5.9.14 A5.9.18
Process Flow	Review		A5.9.10

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A-2.1 Data Dictionary

Operational Functions

Functional Classification	Field Name	Definition	Reference Sections
Project Member Management	Project Administrator	User that has the right in carrying out the administration and servicing of assessment in a project	A5.3
Project Member Management	Finance	User that has the function to manage the execution of agreement and settlement of assessment fee	A5.3
Contract & Financing	A&F	Administration and Finance Department within BSL who manages the execution of agreement and settlement of assessment fee	B2.1.1
e-Project File	Submissions	e-Form, submittals and information submitted for the purpose of an assessment	B3.6.3
e-Project File	Minutes	Record of the proceeding of a conversation, meeting, convention, etc	B3.6.3
e-Project File	Folios	Folder storing the files in a submission	B3.6.3

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A-3.1 Data Dictionary

Assessment Functions

Functional Classification	Field Name	Definition	Reference Sections
Project Member Management	CIR Review Group	User that possesses the right in accessing the project information for the purpose of vetting the Credit Interpretation Request (CIR) application stipulated under Section A4	A5.3.2
Credit Library	Precedent Case	Decided case that furnishes a basis for determining later cases involving similar issues and providing corresponding ruling	C1.5D.4,
BEAM Assessor Management	BEAM Assessor (BAS)	Professional with the authority to exercise due diligence and professional judgement on the technical content of the submission	C2
Submission Member Assignment	Aspect Officer	Technical staff within the BSL Secretariat responsible for conducting technical readiness and providing technical alignment for a designated Aspect of an assessment	C1.3B.17, C1.3C.1
Submission Member Assignment	BSL Manager	Manager within the BSL Secretariat responsible for managing the overall quality and delivery of the assessment	C1.3C, C3.1.3, C3.2.2

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A.3-2 Data Dictionary

Assessment Functions

Functional Classification	Field Name	Definition	Reference Sections
Submission Member Assignment	Expert Panel	Subject matter expert with the authority to exercise adjudication on the submission and determine the scoring of the assessment	C1.5, C1.5A,
Submission Member Assignment	Project in Charge	Technical staff with in the BSL Secretariat responsible for overseeing the overall process flow of an assessment and advising the assessment progress to the users and other members within the BSL Secretariat	C1.6F.1
Submission Member Assignment	In House Vetting Team	BAS within the BSL Secretariat granted with the authority to exercise adjudication on the submission and determining the scoring of the assessment	C1.8, C3.1.3, C3.2.2
Project Assessment	Assessment Summary	Summary of comments issued made by multiple parties during the assessment of a project	C1.3B.14 ,C1.3
ASC Meeting	Chairman	Any user nominated to preside the ASC Meeting and endorse on the decision made collectively by Member	C1.6C.1
ASC Meeting	Member	Any user nominated to conduct the ASC Meeting and express views on a project	C1.5C, C4.3.3

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Appendix B List of Milestones

This section provides the terminologies used for the milestone functions of iBEAM.

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B-1 List of Milestones

The milestones below are listed in the **chronological sequence** to the assessment.

ID	Stages of Assessment	Milestone Name	Description	Reference Section
1	Technical Checking	Technical Checking	Comments raised by the Project in Charge after checking on the technical readiness of the submission	C1.2
2	Technical Checking	Reply to Technical Checking Comment	Applicant's response to the comments made on the technical readiness of the submission	A5.5

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B-2 List of Milestones

The milestones below are listed in the **chronological sequence** to the assessment.

ID	Stages of Assessment	Milestone Name	Description	Reference Section
3	BAS Comment	BAS Comment	Comments raised by the BAS after the professional checking on the technical data provided in the submission	C1.3A
4	BAS Comment	AO Review	Reviewing of BAS Comment by an Aspect Officer in BEAM Society	C1.3B
5	BAS Comment	Manager Review	Reviewing of BAS Comment by a Manager in BEAM Society	C1.3C
6	BAS Comment	PIC Consolidation	Consolidation of BAS Comment by a Project in Charge in BEAM Society	C1.3D
7	BAS Comment	AO Final Review	Final revision of BAS Comment by an Aspect Officer in BEAM Society	C1.3E
8	BAS Comment	Reply to BAS Comment	Applicant's response to the comments made by BEAM Society	A5.6

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B-3 List of Milestones

The milestones below are listed in the **chronological sequence** to the assessment.

ID	Stages of Assessment	Milestone Name	Description	Reference Section
9	BAS Report	BAS Report	Reporting of the assessment by the BAS after the professional assessment on the technical data provided in the submission	C1.4A
10	BAS Report	AO Review	Reviewing of the BAS Reporting by an Aspect Officer in BEAM Society	C1.4B
11	BAS Report	Manager Review	Reviewing of the BAS Reporting by a Manager in BEAM Society	C1.4C
12	BAS Report	PIC Vetting Circulation	Consolidation of the BAS Reporting by a Project in Charge in BEAM Society	C1.4D

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B-4a.1 List of Milestones

ASC Route

The milestones below are listed in the **chronological sequence** to the assessment.

ID	Stages of Assessment	Milestone Name	Description	Reference Section
13A	Vetting	Expert Panel Review	Reviewing of the BAS Reporting by an Expert Panel	C1.5A
14A	Vetting	AO Consolidation	Consolidation of the comments made by the Expert Panel on the BAS Reporting	C1.5B
15A	Vetting	ASC Vetting	Vetting of the BAS Reporting by the Chairperson and Members of the Assessment Subcommittee	C1.5C
16A	Vetting	Post-vetting Credit Routing	Selection of Post TRC Comment, Post-vetting Report and Result Finalisation on BAS Reporting by a Project in Charge in BEAM Society	C1.5D

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B-4a.2 List of Milestones

ASC Route

The milestones below are listed in the **chronological sequence** to the assessment.

ID	Stages of Assessment	Milestone Name	Description	Reference Section
17A-1	Post TRC Comment	Post TRC Comment	Post TRC Comment issued by BAS based on the recommendations issued by the Assessment Subcommittee	C1.6A
18A-1	Post TRC Comment	AO Review	Reviewing of Post TRC Comment by an Aspect Officer in BEAM Society	C1.6B
19A-1	Post TRC Comment	Expert Panel Review	Reviewing of Post TRC Comment by an Expert Panel	C1.6C
20A-1	Post TRC Comment	AO Consolidation	Consolidation of the comments made by the Expert Panel on the Post TRC Comment	C1.6D
21A-1	Post TRC Comment	Manager Review	Reviewing of Post TRC Comment by a Manager in BEAM Society	C1.6E
22A-1	Post TRC Comment	PIC Consolidation	Consolidation of Post TRC Comment by a Project in Charge in BEAM Society	C1.6F
23A-1	Post TRC Comment	AO Final Consolidation	Final revision of Post TRC Comment by an Aspect Officer in BEAM Society	C1.6G

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B-4a.3 List of Milestones

ASC Route

The milestones below are listed in the **chronological sequence** to the assessment.

ID	Stages of Assessment	Milestone Name	Description	Reference Section
24	Post TRC Comment	Acceptance on Post TRC Comment	Instruction issued by the Applicant to proceed or decline the reply to the Post TRC Comment	A5.7
25	Post TRC Comment	Reply to Post TRC Comment	Applicant's response to the Post TRC Comment made by BEAM Society	A5.8

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B-4a.4 List of Milestones

ASC Route

The milestones below are listed in the **chronological sequence** to the assessment.

ID	Stages of Assessment	Milestone Name	Description	Reference Section
26A-1	Post TRC Report	Post TRC Report	Post TRC Reporting of the assessment by the BAS after the professional assessment on the technical data provided in the response	C1.7A
27A-1	Post TRC Report	AO Review	Reviewing of Post TRC Reporting by an Aspect Officer in BEAM Society	C1.7B
28A-1	Post TRC Report	Expert Panel Review	Reviewing of Post TRC Reporting by an Expert Panel	C1.7C
29A-1	Post TRC Report	AO Consolidation	Consolidation of the comments made by the Expert Panel on the Post TRC Reporting	C1.7D

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B-4a.5 List of Milestones

ASC Route

The milestones below are listed in the **chronological sequence** to the assessment.

ID	Stages of Assessment	Milestone Name	Description	Reference Section
30A-1	Post TRC Report	Manager Review	Reviewing of Post TRC Reporting by a Manager in BEAM Society	C1.7E
31A-1	Post TRC Report	PIC Vetting Circulation	Consolidation of Post TRC Reporting by a Project in Charge in BEAM Society	C1.7F
32A-1	Post TRC Report	ASC Review	Vetting of Post TRC Reporting by the Chairperson and Members of the Assessment Subcommittee	C1.7G
33A-2	Post-vetting Report	Post-vetting BAS Report	Revision of the reporting by the BAS based on the recommendations issued by the Assessment Subcommittee	C1.7H
34A-2	Post-vetting Report	AO Review	Reviewing of the revised reporting made by the BAS on the BAS Report	C1.7I

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B-4a.6 List of Milestones

ASC Route

The milestones below are listed in the **chronological sequence** to the assessment.

ID	Stages of Assessment	Milestone Name	Description	Reference Section
35A	Result Finalisation	PIC Review	Reviewing of the revised reporting comments by a Project in Charge in BEAM Society	C1.7J
36A	Result Finalisation	Manager Endorsement	Endorsement of the final Assessment Report by a Manager in BEAM Society	C1.7K
37A	Result Finalisation	PIC Consolidation	Consolidation of final Assessment Report by a Project in Charge in BEAM Society	C1.7L
38	Result Issuance	Acceptance on Assessment Result	Instruction issued by the Applicant to proceed or decline the result of the assessment	A5.9

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B-4b.1 List of Milestones

IHAT Route

The milestones below are listed in the **chronological sequence** to the assessment.

ID	Stages of Assessment	Milestone Name	Description	Reference Section
15B	Vetting	IHAT Vetting	Vetting of the BAS Reporting by the members of the In-House Assessment Team	C1.8A
16B	Vetting	Post-vetting Credit Routing	Selection of Post TRC Comment, Post-vetting Report and Result Finalisation on BAS Reporting by a Project in Charge in BEAM Society	C1.8B

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B-4b.2 List of Milestones

IHAT Route

The milestones below are listed in the **chronological sequence** to the assessment.

ID	Stages of Assessment	Milestone Name	Description	Reference Section
17B-1	Post TRC Comment	Post TRC Comment	Post TRC Comment issued by BAS based on the recommendations issued by the In-House Assessment Team	C1.9A
18B-1	Post TRC Comment	AO Review	Reviewing of Post TRC Comment comment by an Aspect Officer in BEAM Society	C1.9B
19B-1	Post TRC Comment	IHAT Review	Reviewing of Post TRC Comment by members of the In-House Assessment Team	C1.9C
20B-1	Post TRC Comment	AO Consolidation	Consolidation of the comments made by the In-House Assessment Team on the Post TRC Comment	C1.9D
21B-1	Post TRC Comment	Manager Review	Reviewing of Post TRC Comment by a Manager in BEAM Society	C1.9E
22B-1	Post TRC Comment	PIC Consolidation	Consolidation of Post TRC Comment by a Project in Charge in BEAM Society	C1.9F
23B-1	Post TRC Comment	AO Final Consolidation	Final consolidation of Post TRC Comment by an Aspect Officer in BEAM Society	C1.9G

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B-4b.3 List of Milestones

IHAT Route

The milestones below are listed in the **chronological sequence** to the assessment.

ID	Stages of Assessment	Milestone Name	Description	Reference Section
24	Post TRC Comment	Acceptance on Post TRC Comment	Instruction issued by the Applicant to proceed or decline the reply to the Post TRC Comment	A5.7
25	Post TRC Comment	Reply to Post TRC Comment	Applicant's response to the Post TRC Comment made by BEAM Society	A5.8

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B-4b.4 List of Milestones

IHAT Route

The milestones below are listed in the **chronological sequence** to the assessment.

ID	Stages of Assessment	Milestone Name	Description	Reference Section
26B-1	Post TRC Report	Post TRC Report	Post TRC Reporting of the assessment by the BAS after the professional assessment on the technical data provided in the response	C1.10A
27B-1	Post TRC Report	AO Review	Reviewing of Post TRC Reporting by an Aspect Officer in BEAM Society	C1.10B
30B-1	Post TRC Report	Manager Review	Reviewing of Post TRC Reporting by a Manager in BEAM Society	C1.10C
31B-1	Post TRC Report	PIC Vetting Circulation	Consolidation of Post TRC Reporting by a Project in Charge in BEAM Society	C1.10D
32B-1	Post TRC Report	IHAT Vetting	Vetting of Post TRC Reporting by the members of the In-House Assessment Team	C1.10E

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B-4b.5 List of Milestones

IHAT Route

The milestones below are listed in the **chronological sequence** to the assessment.

ID	Stages of Assessment	Milestone Name	Description	Reference Section
33B-2	Post-vetting Report	Post-vetting BAS Report	Revision of the reporting by the BAS based on the recommendations issued by the In-House Assessment Team	C1.10F
34B-2	Post-vetting Report	AO Review	Reviewing of the revised reporting made by the BAS on the BAS Report	C1.10G
35B	Result Finalisation	PIC Review	Reviewing of the revised reporting comments by a Project in Charge in BEAM Society	C.10H
36B	Result Finalisation	Manager Endorsement	Endorsement of the final Assessment Report by a Manager in BEAM Society	C1.10I
37B	Result Finalisation	PIC Consolidation	Consolidation of final Assessment Report by a Project in Charge in BEAM Society	C1.10J
38	Result Issuance	Acceptance on Assessment Result	Instruction issued by the Applicant to proceed or decline the result of the assessment	A5.9

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B-5.1 List of Milestones

Review Application

The milestones below are listed in the **chronological sequence** to the assessment.

ID	Stages of Assessment	Milestone Name	Description	Reference Section
37	Review	Submit Review Application	Reviewing of the Applicant's Review Application by a Project in Charge in BEAM Society	C1.11A
38	Review	BAS Review Report	Reviewing of the BAS Reporting by the BAS based on the Review Application	C1.11B
39	Review	AO Evaluate Review Report	Reviewing of the BAS Reporting by an Aspect Officer in BEAM Society	C1.11C
40	Review	Expert Panel Advice on Review Report	Reviewing of the BAS Reporting by an Expert Panel	C1.11D

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B-5.2 List of Milestones

Review Application

The milestones below are listed in the **chronological sequence** to the assessment.

ID	Stages of Assessment	Milestone Name	Description	Reference Section
41	Review	AO Consolidation on Expert Panel Review Advice	Consolidation of the comments made by the Expert Panel on the BAS Reporting	C1.11E
42	Review	Manager Review Report	Reviewing of the BAS Reporting by a Manager in BEAM Society	C1.11F
43	Review	PIC Vetting Circulation	Consolidation of the BAS Reporting by a Project in Charge in BEAM Society	C1.11G
44A	Review	ASC Vetting - Review Report	Vetting of the BAS Reporting by the Chairperson and Members of the Assessment Subcommittee	C1.11H

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B-5.3 List of Milestones

Review Application

The milestones below are listed in the **chronological sequence** to the assessment.

ID	Stages of Assessment	Milestone Name	Description	Reference Section
44B	Review	IHAT Vetting - Review Report	Vetting of the BAS Reporting by the members of the In-House Assessment Team	C1.11I
45	Review	PIC Consolidate Post-vetting Review Report	Consolidation of the BAS Reporting by a Project in Charge in BEAM Society based on the recommendations issued by the In-House Assessment Team	C1.11J
46	Review	Manager Endorse Review Report	Endorsement of the BAS Reporting by a Manager in BEAM Society	C1.11K
47	Review	PIC Consolidation on Review Report	Consolidation of the BAS Reporting by a Project in Charge in BEAM Society	C1.11L
38	Result Issuance	Acceptance on Assessment Result	Instruction issued by the Applicant to proceed or decline the result of the assessment	A5.9

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B-6.1 List of Milestones

First Appeal Application

The milestones below are listed in the **chronological sequence** to the assessment.

ID	Stages of Assessment	Milestone Name	Description	Reference Section
49	First Appeal	Submit First Appeal Application	Reviewing of the Applicant's First Appeal Application by a Project in Charge in BEAM Society	C1.12A
50	First Appeal	Finance Review First Appeal Application	Reviewing of the First Appeal Application by A&F staff in BEAM Society	C1.12B
51	First Appeal	AO Review First Appeal Application	Reviewing of the BAS Reporting by an Aspect Officer in BEAM Society based on the First Appeal Application	C1.12C
52	First Appeal	Expert Panel Advice on First Appeal Application	Reviewing of the BAS Reporting by an Expert Panel	C1.12D

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B-6.2 List of Milestones

First Appeal Application

The milestones below are listed in the **chronological sequence** to the assessment.

ID	Stages of Assessment	Milestone Name	Description	Reference Section
53	First Appeal	AO Consolidation on EP First Appeal Advice	Consolidation of the comments made by the Expert Panel on the BAS Reporting	C1.12E
54	First Appeal	Manager Review First Appeal Application	Reviewing of the BAS Reporting by a Manager in BEAM Society	C1.12F
55	First Appeal	APC Review First Appeal Application	Vetting of the BAS Reporting by the members of the Appeal Committee	C1.12G

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B-6.3 List of Milestones

First Appeal Application

The milestones below are listed in the **chronological sequence** to the assessment.

ID	Stages of Assessment	Milestone Name	Description	Reference Section
56	First Appeal	AO Consolidate First Appeal Report	Consolidation of the BAS Reporting by an Aspect Officer in BEAM Society based on the recommendations issued by the Appeal Committee	C1.12H
57	First Appeal	Manager Review First Appeal Report	Endorsement of the BAS Reporting by a Manager in BEAM Society	C1.12I
58	First Appeal	PIC Consolidation on First Appeal Report	Consolidation of the BAS Reporting by a Project in Charge in BEAM Society	C1.12J
38	Result Issuance	Acceptance on Assessment Result	Instruction issued by the Applicant to proceed or decline the result of the assessment	A5.9

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Appendix C Calculation Logic

This section provides the calculation logic for the calculated data field in e-Form.

C-1 BEAM Plus NB v.2.0

C-2 BEAM Plus EB v.2.0 Portfolio Assessment (MAN & EU)

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C-1.1 Calculation Logic

BEAM Plus NB v.2.0

Credit	Calculation Function	Calculation Input	Calculation Result	
		Decimal Places	Decimal Places	Rounding
IDCM 8	Percentage of Waste Recycled	Waste Quantity: 3	2	Round down
SS P1	Percentage of Greenery	Total greenery area: 3	2	Round-down
SS 1a	Accessibility Index	Walking Distance: No limit Headway: No limit Horizontal Commuting Time of the Mechanical Means: No limit	2	Round-down
SS 8a(1)	Percentage of total site area with shade	Total area with shade: 3	2	Round-down
SS 8a(1)	Percentage of non-roof impervious area with shade	Total area of non-roof impervious surfaces: 3 Total area of non-roof impervious surface with shade: 3	2	Round-down
SS 8b	Percentage of tree coverage area	Total Tree Coverage Area: 3	2	Round-down
MW P1	Required RS & MRC Space	Usable Floor Space: 3	3	Round-down

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C-1.2 Calculation Logic

BEAM Plus NB v.2.0

Credit	Calculation Function	Calculation Input	Calculation Result	
		Decimal Places	Decimal Places	Rounding
MW 1	Percentage of Building Reuse	Quantity Retained and Reused from Existing Building (tonnes/m^3): 2 Total Quantity in New Building (tonnes/m^3): 2	2	Round-down
MW 2	Percentage of Modular and Standardised Element	Quantity of Major Element/ Module (tonnes/m^3/HKD/m^2): 2 Quantity of Modular and Standardised Element (tonnes/m^3/HKD/m^2): 2 Number of Typical Unit: 0	2	Round-down
MW 3	Percentage of Prefabrication	Quantity (Not Prefabricated / Prefabricated off-site) (tonnes/m^3): 2	2	Round-down
MW 5	Percentage of Sustainable Forest Products	Quantity (HKD/kg/m^3): 2	2	Round-down
MW 6	Percentage of Recycled Materials	Quantity (HKD/tonnes/m^3): 2 Percentage of Recycled Content: 2	2	Round-down

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C-1.3 Calculation Logic

BEAM Plus NB v.2.0

Credit	Calculation Function	Calculation Input	Calculation Result	
		Decimal Places	Decimal Places	Rounding
MW 7	Combined Contributions to Ozone Depletion and Global Warming Potentials	Quantity of HVAC&R Equipment: 0 Cooling Capacity (kW): 2 Refrigerant Charge (kg/unit): 2 Refrigerant Leakage Rate (%) (User Input): 2 Equipment Life (User Input): 0 End-of-Life Refrigerant Loss (%): 2	2	-
MW 8	Percentage of Regional Materials	Quantity (HKD/tonnes/m^3): 2 Percentage of Regional Material Content: 2	Percentage of Regional Material: 2	Round-down
MW 9a	Percentage of Certified Green Product	Amount (kg/m^3/HKD/m^2): 2	Percentage of Certified Green Product: 2	Round-down

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C-1.4 Calculation Logic

BEAM Plus NB v.2.0

Credit	Calculation Function	Calculation Input	Calculation Result	
		Decimal Places	Decimal Places	Rounding
MW 9b	Percentage of Rapidly Renewable Materials	Amount (kg/m^3/HKD/m^2): 2	Percentage of Rapidly Renewable Materials: 2	Round-down
EU P1	Designed / Installed LPD	Area of Space: 2 Quantity: 0 Nominal Lamp Wattage / Lamp Control Gear Loss / Total Circuit Wattage: 2	Designed / Installed LPD: 2	-
EU 1 Option 1	Percentage of External Wall Area	Total External Wall Area / External Wall Area by Non-conditioned Space: 3	2	Round-down
EU 1 Option 1	Percentage of Roof Area with Vegetation	Roof Area of Conditioned Spaces / Roof Area of Conditioned Spaces with Vegetation: 3	2	Round-down

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C-1.5 Calculation Logic

BEAM Plus NB v.2.0

Credit	Calculation Function	Calculation Input	Calculation Result	
		Decimal Places	Decimal Places	Rounding
EU 1 Option 1	Percentage of Façade Area with Vegetation	Façade Area of Conditioned Spaces / Façade Area of Conditioned Spaces with Vegetation: 3	2	Round-down
EU 1 Option 2	Optimum Spatial Planning - Irradiation Gain Reduction	Overall Façade Irradiation/ Façade Irradiation of Non-conditioned Façade Area: 3	2	Round-down
EU 1 Option 2	External Shading Devices – Solar Irradiation Reduction	Annual solar irradiation on façade (Baseline / Design): 3	2	Round-down
EU 1 Option 2	Percentage Reduction in U-value of Roof by Vegetation	U-value of Roof (with / without vegetation): 3	2	Round-down
EU 1 Option 2	Percentage floor area of normally occupied space achieved a wind velocity of 0.2 m/s	Total floor area of normally occupied space: 3 Floor area of normally occupied space achieving the requirement: 3	2	Round-down

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C-1.6 Calculation Logic

BEAM Plus NB v.2.0

Credit	Calculation Function	Calculation Input	Calculation Result	
		Decimal Places	Decimal Places	Rounding
EU 1 Option 2	Percentage area achieving sDA300/25%	Total area of normally occupied space: 3 Area of normally occupied space achieving the requirement: 3	2	Round-down
EU 2 Option 1	Percentage of Reduction of Annual CO_2 Emission (%)	Annual Energy Consumption (Baseline / Proposed): 3	2	Round-down
EU 2 Option 2	Percentage Reduction in OTTV / RTTV	OTTV / RTTV: 2	2	Round-down
EU 2 Option 2	Percentage of Habitable Area with ventilation requirement achieved	Total Habitable Area / Habitable Area with Ventilation Requirements Satisfied: 3 [Form S-B2]	2	Round-down

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C-1.7 Calculation Logic

BEAM Plus NB v.2.0

Credit	Calculation Function	Calculation Input	Calculation Result	
		Decimal Places	Decimal Places	Rounding
EU 2 Option 2	Percentage of Net Free Unobstructed Area of Openings to Net Occupied Floor Area	Net Free Unobstructed Area of Openings / Net Occupied Floor Area: 3 [Form S-B2]	2	Round-down
EU 2 Option 2	Performance Improvement of Coefficient of Performance (COP)	Rated Capacity: 2 Rated COP: 2 Min. allowed COP: 2 [Form S-B3]	2	Round-down
EU 2 Option 2	Performance Improvement of Lighting Power	Area of space: 3 Quantity: 0 Nominal Lamp Wattage / Lamp Control Gear Loss / Total Circuit Wattage: 2 Max. Allowed LPD: 2 [Form S-B4]	2	Round-down

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C-1.8 Calculation Logic

BEAM Plus NB v.2.0

Credit	Calculation Function	Calculation Input	Calculation Result	
		Decimal Places	Decimal Places	Rounding
EU 2 Option 2	Reduction from Maximum Allowable Electrical Power for Lifts & Escalators	Rate Load: 0 Rated Speed: 1 Rated Power / Max. Allowed Electrical Power: 2 [Form S-B4]	2	Round-down
EU 3 Option 1	Percentage of Reduction of Peak Electricity Demand	Electricity Demand (Baseline / Proposed): 3	2	Round-down
EU 5b	Percentage of annual building energy consumption obtained from all the on-site renewable energy sources	Annual energy generated/ Annual Building Energy Use: 3	2	Round-down
EU 8	Percentage of Certified Energy Efficient Products	No. of Appliance: 0 Rated Power: 2	2	Round-down

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C-1.9 Calculation Logic

BEAM Plus NB v.2.0

Credit	Calculation Function	Calculation Input	Calculation Result	
		Decimal Places	Decimal Places	Rounding
WU P1 & 1	Percentage of Potable Water Consumption Reduction	Flow Rate: 2 No. of User: 0 Operation Day: 0	2	Round-down
WU 2	Percentage reduction in potable water consumption for irrigation	Annual irrigation demand (Baseline / Design): 3	2	Round-down
WU 7	Percentage reduction	Flush Volume: 2 No. of User: 0 Operation Day: 0	2	Round-down
WU 8a	Percentage reduction in potable water use replaced by harvested rainwater	Annual Potable Water Use: 3	2	Round-down
WU 8a	Monthly / Annual Yield of Rainwater	Monthly mean of rainfall: 1 Collection Area of Rainwater: 3 Run-off Coefficient: 2 Filter Efficiency: 2	-	-

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C-1.10 Calculation Logic

BEAM Plus NB v.2.0

Credit	Calculation Function	Calculation Input	Calculation Result	
		Decimal Places	Decimal Places	Rounding
WU 8b	Percentage reduction in potable water use replaced by recycled grey water	Annual Potable Water Use: 3	2	Round-down
WU 8c	Percentage reduction in potable water use replaced by harvested rainwater and/or recycled grey water	Annual Potable Water Use: 3	2	Round-down
WU 8c	Monthly / Annual Yield of Rainwater	Monthly mean of rainfall: 1 Collection Area of Rainwater: 3 Run-off Coefficient: 2 Filter Efficiency: 2	-	-
HWB P1	Percentage of opening area to space area	Space Area: 2 Window opening area: 2	2	Round-down
HWB 2	Visual Quality Score	Area of Frame: 2	2	Round-down
HWB 4a (1.1 & 1.2)	Percentage of opening area to space area	Space Area: 2 Window opening area: 2	2	Round-down

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C-1.11 Calculation Logic

BEAM Plus NB v.2.0

Credit	Calculation Function	Calculation Input	Calculation Result	
		Decimal Places	Decimal Places	Rounding
HWB 8b	Enclosed and/or semi-enclosed car park area as percentage of CFA (%)	CFA of the Project: 3 Enclosed and/or semi-enclosed car park area: 3	2	Round-down
HWB 11	Percentage of Area fulfilling sDA300/50%	Floor Area of the Studied Normally Occupied Space: 3 Area fulfilling sDA300/50%: 3	3	Round-down
HWB 11	Percentage of Area fulfilling ASE1000,250	Floor Area of the Studied Normally Occupied Space: 3 Area fulfilling ASE1000,250: 3	3	Round-up

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C-2.1 Calculation Logic

BEAM Plus EB v.2.0 Portfolio Assessment (MAN & EU)

Credit	Calculation Function	Calculation Input	Calculation Result	
		Decimal Places	Decimal Places	Rounding
MAN 11	Green cleaning detergent purchase	Quantity: N/A Volume per each quantity of detergent: N/A	2	Round-down

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Appendix D Project Group Authority

This section provides the detailed authority for different project groups.

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D-1 Project Group Authority

Project Group Name	Applicable Global User Groups	Available Authority	Maximum Number of Users
Active Project User	External	1. Edit e-Form, Credit Summary and project information fact sheet 2. Edit CIR application	12
CIR Review Group	Internal	1. Review CIR application and project information fact sheet	*Nil.*
Finance	Internal	1. Edit information on contract and finance	*Nil.*
Owner	External	1. Edit e-form, Credit Summary and project information fact sheet 2. View information on contract and finance 3. Edit CIR application 4. Assign members as Owner, Active Project User, Project BEAM Pro and Project Users *(Read-only)*	5
Project Administrator	Internal	1. Review e-form, Credit Summary and project information fact sheet 2. Review CIR application 3. Assign members as Owner, Active Project User, Project BEAM Pro and Project Users *(Read-only)*	*Nil.*

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D-2 Project Group Authority

Project Group Name	Applicable Global User Groups	Available Authority	Maximum Number of Users
Project BEAM Pro	External	1. Edit e-form, Credit Summary and project information fact sheet 2. Submit project for assessment 3. View information on contract and finance 4. Edit CIR application 5. Submit CIR application 6. Assign members as Active Project User, Project BEAM Pro and Project Users *(Read-only)*	3
Project Users *(Read-only)*	External	1. View e-form, Credit Summary and project information fact sheet 2. View CIR application	38

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