



**Midlands and Lancashire Commissioning Support Unit**

**Care at Home (Merseyside)**

**Accreditation and Enrolment Guide**



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## Overview

The SProc.Net system is a sophisticated web-based technology platform used by clients and providers to aid in the efficient and fair procurement of services.

Providers wishing to supply services using SProc.Net must complete an Accreditation and Enrolment process into their desired client-supply-category. For example, the client would be 'Midlands and Lancashire Commissioning Support Unit' with the supply category, 'Care at Home (Merseyside)'.



Once your application is completed and approved, you will be added to the specified supply base. Going forward, you will receive notifications of service Requirements distributed by the CCGs and will have the opportunity to submit Offers.

This guide is a step-by-step walk through of how to:

- ➔ Complete the Registration process
- ➔ Create additional users within the system
- ➔ Create an Accreditation

→ Create an Enrolment

## Glossary

<b>New Supplier</b>	A provider who has never used the SProc.Net system before
<b>Supply Category</b>	This is the over-arching service sector/type of service, e.g. 'Care at Home (Merseyside)'
<b>Service Category</b>	The Supply Category is broken down into smaller Service Categories. E.g. 'Care at Home (Merseyside)' can be broken down into 'Learning Disability' or 'Mental Health', etc.
<b>Service Template</b>	Further category breakdown in to the specific service required for an individual
<b>Registration</b>	Process to gain access to SProc.Net
<b>Accreditation</b>	An objective evaluation based on a set of defined criteria
<b>Enrolment</b>	A subjective evaluation based on a set of defined criteria
<b>Draft</b>	Saved workings but process incomplete
<b>User</b>	An employee who manages services procurement through SProc.Net
<b>Administrator</b>	A system user with the highest level of access

**Notes:**

**What is a Supply Category?**

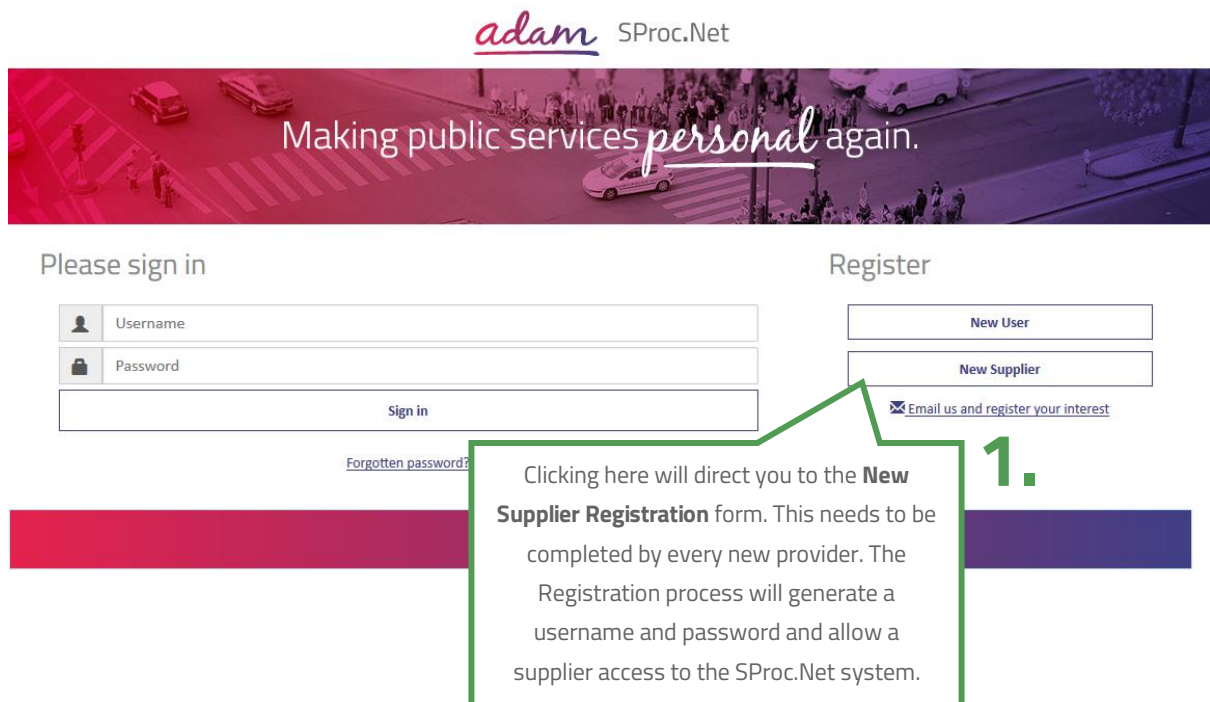
Within SProc.Net Accreditation and Enrolment is individual to each client-supply-category, so you can supply services to more than one client, or more than one service to the same client, but you must go through the Accreditation and Enrolment process for each client-supply-category separately.

Client	Supply Category	Service Category
Midlands and Lancashire Commissioning Support Unit	Care at Home (Merseyside)	Fast Track (End of Life)
		Learning Disability
		Mental Health
		Physical Disability

## Registration

You only need to complete the Registration process if you are a new provider on SProc.Net. If you supply to another client via the system, you need to start with Accreditation (see page 11).

1. Go to the SProc.Net website: [www.SProc.net](http://www.SProc.net)
2. The SProc.Net sign in page contains the links to register as a 'New Supplier':



**adam** SProc.Net

Making public services *personal* again.

Please sign in

Register

Username

Password

Sign in

Forgotten password?

New User

New Supplier

Email us and register your interest

1.

Clicking here will direct you to the **New Supplier Registration** form. This needs to be completed by every new provider. The Registration process will generate a username and password and allow a supplier access to the SProc.Net system.

3. The registration form will ask for details about your company:

New Supplier Registration

**Step 1 of 2: Business Details**

Please complete the form below with your business' information.

The form will inform you if the Business Name you enter has already been registered, in which case, please click the New User button from the home page to request a login from the system administrator for your Business, or contact us at: [supplier.engagement@useadam.co.uk](mailto:supplier.engagement@useadam.co.uk)

\* Please note it is mandatory to fill in the fields with the \* next to them

**1 Business Details**

Please enter the basic information of your business.

Business Name: \*

( ? Business Name )

Registered Name:

( ? Registered Business Name )

Website:

( ? Website Address )

Logo File:

( ? Logo File )

VAT Registered? \*

( ? VAT Registered? )

Business Tax/VAT #: \*

( ? Business Tax/VAT # )

How did you learn about Adam? \*

**2 Address/ Contact Details**

Please enter the address/contact details of your business.

Location Name:

( ? Business Address Details )

Address 1: \*

( ? Business Address Details )

Address 2:

Post Code: \*

(If you have a non UK address please use the postcode ZZ1 1AA)

Country:

Telephone Number: \*

( ? Telephone number )

Email Address: \*

( ? Email Address )

Fax Number:

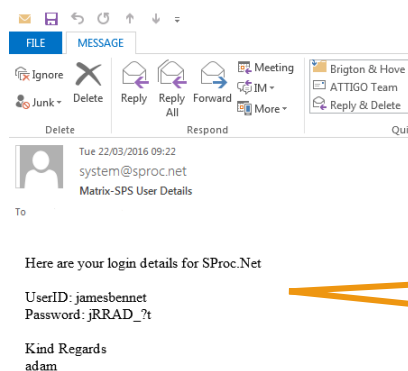
3.

4. Navigate through to the next page by clicking 'Next'



- This page is about creating a user profile. This first user will, by default, become the Administrator for your account. They can create further users for your account at a later stage, include other administrators (details on page 25):

- Complete registration by clicking 'Finish'
- Clicking 'Finish' will take you back to the SProc.Net login page and you will shortly receive an email containing a username and password:



These details will allow access to the SProc.Net system.

- From the SProc.Net login page, login using the username and password provided. There will be an automatic prompt to change your password

*adam* SProc.Net

1. Enter your username

2. Register

3. Click 'Sign In' to continue

- Click 'Reset Password' and the system will navigate back to the SProc.Net log in screen

### Resetting Your Password

After you reset your password you need to login with your new password before having access to the system.

Enter a password that's easy for you to remember, but hard for others to guess. Consider the following:

- You must use a mixture of letters and numbers.
- Passwords must be at least 8 characters long.
- You must include at least one capital letter.
- You may not choose a password that has been used previously.
- Do not copy and paste your password from an email. Always manually type it in.

Make sure your new password meets the password criteria specified.

New Password:

Repeat Password:

1. Create a new password.

2. Click 'Reset Password' to complete.

Cancel Reset Password

- Log in using the given username and your new password and click 'Sign In'

*adam* SProc.Net

1. Enter your username

2. Register

3. Click 'Sign In' to continue

## Accreditation and Enrolment

All providers need to go through Accreditation and Enrolment before they can supply to any client using SProc.Net. This involves submission of information and documentation, these are set by the client as a standards threshold / minimum criteria.

1. Start this process from your homepage, select the '**Accreditation**' icon along the top of the page and select '**New**' from within the coloured banner

The screenshot shows the SProc.Net homepage. At the top, there is a navigation bar with the 'adam' logo and 'SProc.Net' text. Below this is a search bar and a 'Logout' button. A main navigation menu includes 'Accreditations', 'Enrolments', 'Requirements', 'Offers', 'Service Agreements', 'Service Receipts', 'Invoices', 'SRM', 'Reports', 'Admin', and 'Help'. A secondary menu below shows 'Pending', 'Active', 'Expired', and 'All'. A red banner at the bottom left says 'Pending Accreditations'. A green callout box labeled '1.' points to the 'Accreditations' tab in the main navigation, with the text 'Click into the **'Accreditations'** tab on your toolbar'. Another green callout box labeled '2.' points to a 'New' button (a circle with a checkmark) in the bottom right, with the text 'Click into the **'New'** action icon to start a new Accreditation.' Below the banner, there are buttons for 'Draft' and 'Pending Approval'.

2. Populate the required fields:

The screenshot shows the 'New Accreditation' form. At the top, it says 'Please select the Client and Supply Category you wish to accredit to. adam retain the right to call upon your company at any point to provide evidence hours of the contact.' Below this are two dropdown menus. The first is labeled 'Client: \*' and has 'Midlands and Lancashire Commissioning Support Unit' selected. A green callout box labeled '1.' points to this dropdown with the text 'The drop down tab will provide a list of all clients who procure services through SProc.Net. Select **'Midlands and Lancashire Commissioning Support Unit'**'. The second dropdown is labeled 'Category: \*' and has a list of options: 'Care Homes (Staffordshire)', 'Care Homes (Merseyside)', and 'Care at Home (Merseyside)'. A green callout box labeled '2.' points to this dropdown with the text 'The drop down tab will display the categories the selected client procures through SProc.Net. Select the category you wish to supply services. For example, **'Care at Home (Merseyside)'**'.

3. Click '**Next**' to progress:

4. On the next page, you will be required to answer a series of objective questions, you have the option to provide supporting documentation:

Pending Accreditations / Accreditation - Additional Information Step 2 of 6

**+ Accreditation**

**- Questions**

The following questions must be answered accurately before this Accreditation can be submitted  
Please note that the application will timeout after 30 minutes. Remember to save regularly to avoid losing any responses you have entered

Question Type	#	Question Text	Answer	Characters Remaining
Company Information	1	Relevant classifications - Is your organisation a Voluntary, Community and Social Enterprise (VCSE)?	No	
Company Information	2	Relevant classifications - Is your organisation a Sheltered Workshop?	No	
Company Information	3	Relevant classifications - Is your organisation a Public Service Mutual?	No	
Company Information	4	Are you a Small, Medium or Micro Enterprise (SME)?	No	
Company Information	5	Do you have an immediate parent company?	Yes	

**Save** Save as you go

1. Use the drop down options and free text boxes to respond to the questions

**- Upload Optional Documents**

If necessary, please upload all of the documents listed below.  
Please note that documents can be pulled through automatically from previous uploads. you should check and confirm each one before submission.

Document Type	File Name	Issue Date	Issue Number	Expiry Date	Description
Parent Company Details	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Parent Company Details can be uploaded here.

**Save**

2. You then have the option to upload supporting documentation.

3. Click 'Next' to proceed

**Cancel** **Next**

Please note, as a security feature, this page will time out if the 'Save' button is not clicked within 30 minutes and you risk losing your work.

5. Confirm you have read and understood all terms and conditions:

**+ Accreditation**

Adam SPS retain the right to call upon your company at any point to provide evidence to the answers you provide below. If you are contacted to provide evidence, you must do this within 24 hours of the contact.

1. Click a tick into the box

4.

I confirm that I am certified to accept responsibility for submitting this Accreditation on behalf of my organisation

5. Click 'Submit' to continue

**Cancel** **Submit**


6. If you complete the Accreditation in one go, SProc.Net will direct you straight into the Enrolment process




7. Select the location you wish to enrol to. Please note you must enrol all branches from which you will be fulfilling elements of the contract:

You have submitted your Accreditation. Please select a location and click 'Next' to start your Enrolment.

+ Accreditation

Supplier Locations \*   **1.**

Cancel Next

Use the  icon to bring up the list of locations

Select the correct location you wish to enrol **2.**

+ Advanced Search


Find Cancel

Company	Location	Address Line 1	City	Contact
▶ London Living	100 Test Street	100 Test Street	Milton Keynes	

Showing all items. Cancel

You have submitted your Accreditation. Please select a location and click 'Next' to start your Enrolment.

+ Accreditation

Supplier Locations \* Quality Care - Quality Care   **3.**

Cancel Next Click 'Next' to continue

8. You will be directed straight into the Enrolment questions once you click 'Next'

- Answer all listed questions, there will be a mix of drop-down and free-text responses required

Pending Accreditations / Accreditation - Additional Information / Submit Accreditation / New Enrolment Step 5 of 6

**+ Enrolment**

**- Questions**

Please answer all of the questions below

Please note that the application will timeout after 30 minutes. Remember to save regularly to avoid losing any responses you have entered

Question Type	#	Question	Answer	Characters Remaining
Company Information	1	Has your organisation completed the European Single Procurement Document? Please upload to the space provided on your enrolment.	No	
Grounds for Mandatory Exclusion	2	Regulations 57(1) and (2) Please indicate if, within the past five years you, your organisation or any other person who has powers of representation, decision or control in the organisation been convicted anywhere in the world of any of the offences within the summary below and listed at <a href="https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/551130/List_of_Mandatory_Participation_in_a_criminal_organisation">https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/551130/List_of_Mandatory_Participation_in_a_criminal_organisation</a>	Yes	
Grounds for Mandatory Exclusion	3	Please provide the date of conviction and the reasons for conviction.	.	3999 left
Grounds for Mandatory Exclusion		Please provide the identity of who has been convicted.	.	
For Information Only	53	In number of hours, what is your organisations maximum capacity?	.	
For Information Only	54	Of your total capacity, how many hours are currently available?	.	

**Save**

Remember to **'Save'** after you complete each section

1.

Answer all of the Enrolment questions. These answers will be reviewed by a CCG Representative.

Some Enrolment questions will not need a response depending on your answer to the question above. All parent and, if applicable, subsequent child questions must contain an answer for your submission to progress.

10. Download the 2017 – 18 NHS Standard contract which is to be signed and reuploaded.

**Download Documents**

The following documents will need to be downloaded, completed in full and uploaded below before this Enrolment can be submitted

Document Type	Temp
NHS Standard Contract	Care at Home - 2017-18 NHS Standard Contract.pdf

Download the document here. Guidance on which pages need to be completed can be found in the document upload table later in the Enrolment.

11. Upload the required documents:

**Upload Documents**

Please upload all of the documents listed below.  
Please note that documents can be pulled through automatically from previous uploads to the system - you should check and confirm each one before submission.  
Please note that the application will timeout after 30 minutes. Remember to save regularly to avoid losing any work.

Upload the requested documents 1.

Document Type	File Name	Issue Date	Issue Number	Expiry Date	Description
NHS Standard Contract	Blank Document.docx				Please upload completed copies of page 3, 7, 9 & 10.
Service Provider COC Registration Certificate.	Blank Document.docx				This must be the Service Provider Certificate, NOT the Registered Manager Certificate. Pages must be uploaded to show both the Provider ID and the Location ID of the Branch that is being enrolled.
Evidence of Insurances	Blank Document.docx	31/01/2017		31/03/2017	Please upload your Insurance Policy/s or Schedule/s. We would expect to see but not limited to for example, Employer's Liability Insurance, Public Liability Insurance and Clinical Negligence or Medical Malpractice Insurance. An Insurance Certificate alone will not be sufficient.

Remember to 'Save' after you complete each section

**Upload Optional Documents**

If necessary, please upload all of the documents listed below.  
Please note that documents can be pulled through automatically from previous uploads to the system - you should check and confirm each one before submission.

Repeat for the requested 'Optional Documents' where necessary 2.

Document Type	File Name
Financial Documentation	

Please upload one of the following to demonstrate your organisation's economic/financial standing: (a) A copy of the audited accounts for the most recent two years (b) A statement of the turnover, profit & loss account, current liabilities and assets, and cash flow for the most recent year of trading for this organisation (c) A statement of the cash flow forecast for the current year and a bank letter outlining the current cash and credit position (d) Alternative means of demonstrating financial status if any

12. As a provider, you must select which Service Categories you can supply

- ➔ A Service Category is the breakdown of the Supply Category into smaller segments
- ➔ At Enrolment, you will stipulate which categories of services you can supply; subsequently you will only be able to make Offers against Requirements relevant to these selections.

Service Categories

Click "Find More Items" to add additional Service Categories to this Enrolment.

There is no data to display.

Find more items... Save Refresh List

Click 'Find more items' icon to bring up a list of the Service Categories.

4.

Service Category:

Supply Category:

Find Add Add All Done

<input type="checkbox"/>	Service Category ^	Supply Category	Display
<input type="checkbox"/>	Fast Track (End of Life)	Care at Home (Merseyside)	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Learning Disability	(Merseyside)	<input type="checkbox"/>
<input type="checkbox"/>	Mental Health	Care at Home (Merseyside)	<input type="checkbox"/>
<input type="checkbox"/>	Physical Disability	Care at Home (Merseyside)	<input type="checkbox"/>

Showing all items. Add Add All Done

Click ticks into all relevant categories and then click 'Add' followed by 'Done' to complete.

13. Finally, enter your bank details

Bank Details

Please Enter The Bank Details For This Location.

Bank Name: \*

Account Name: \*

Sort Code: \*

(Please enter your sort code excluding dashes or spaces. For all UK based accounts this will be 6 digits.)

5.

To progress your Enrolment click 'Finish'

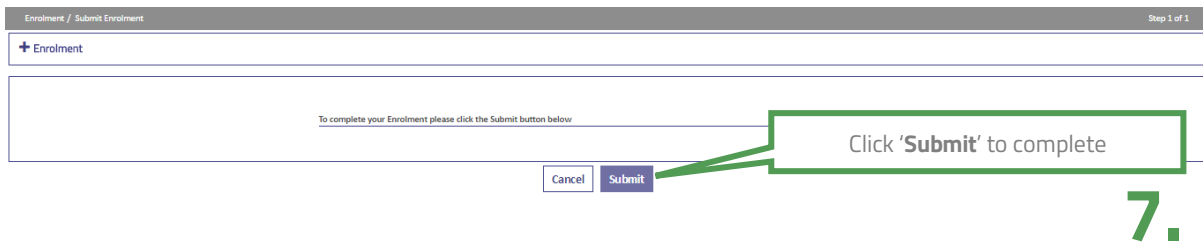
Cancel Finish

Click 'Finish' to continue

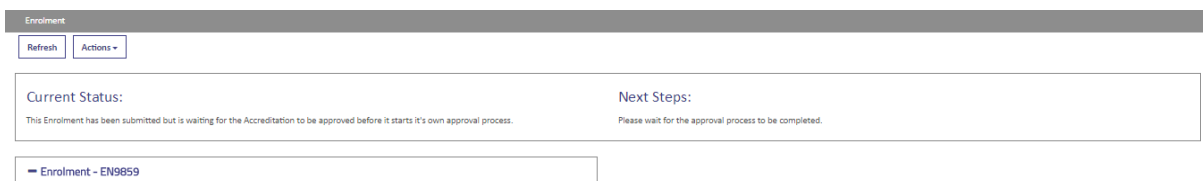
6.

14. Click 'Submit' to complete:





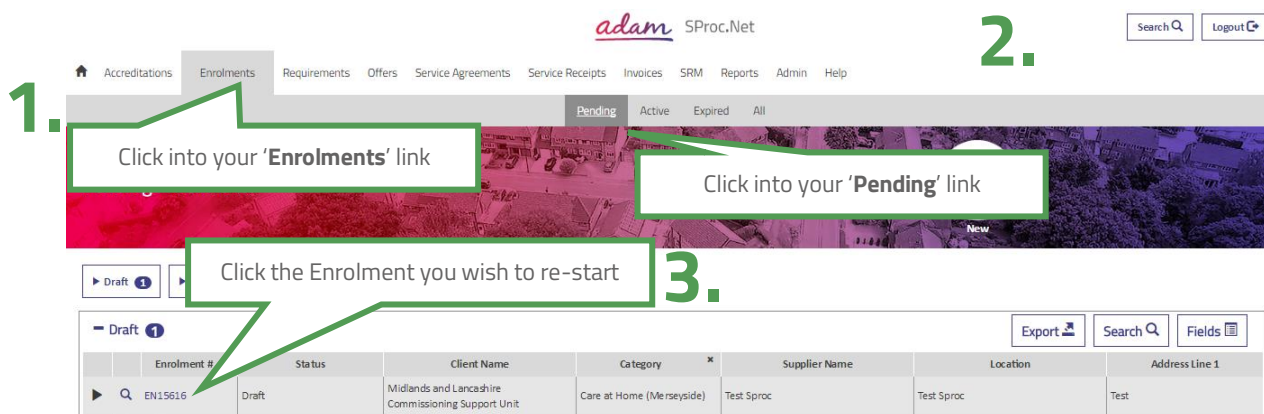
15. The status of the Enrolment will show as submitted:



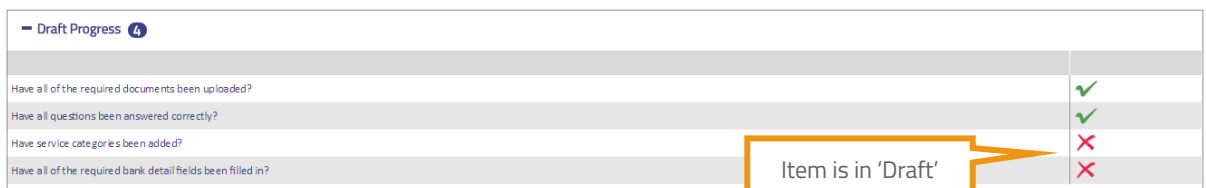
### Re-Starting an Enrolment from Draft

If you have started an Enrolment and saved your progress you can continue from where you finished by locating the Enrolment using the 'EN' reference number

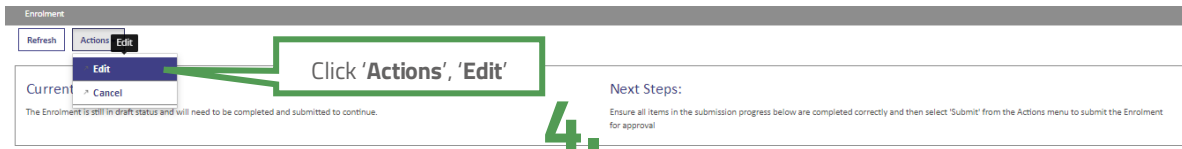
1. Click into the relevant object to view your draft Enrolment



2. The draft progress will show which sections are incomplete

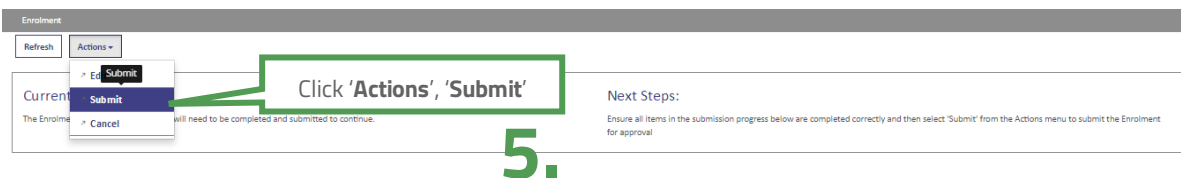


- From the Enrolment summary page, to edit the information click into the 'Actions' icon:

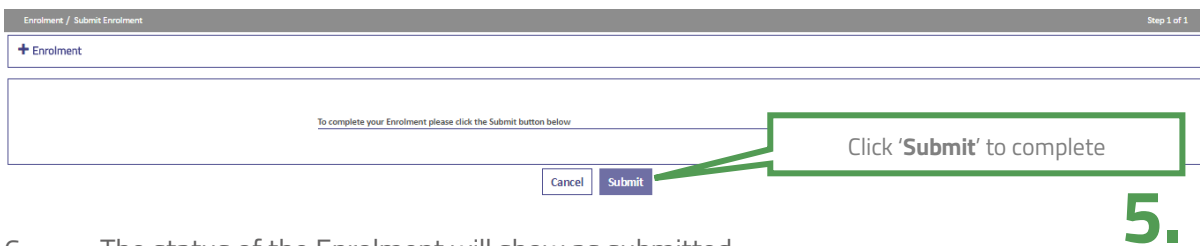


Edit the information as needed, replacing any draft text/characters previously used to save.

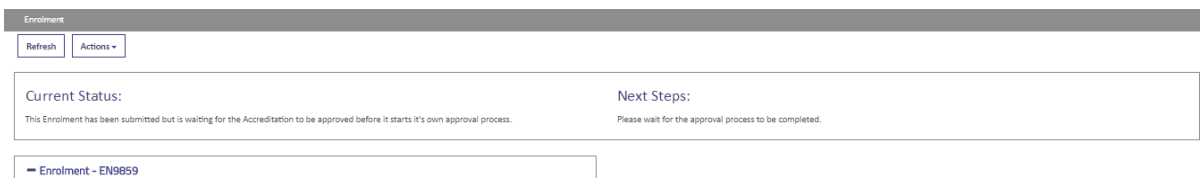
- This process can be repeated as many times as needed, clicking 'Save' frequently to save your current workings.
- When complete use the 'Actions' icon to 'Submit':



Click 'Submit' to complete:



- The status of the Enrolment will show as submitted:



## Summary Pages

➔ These pages contain all the submission details of your Accreditation and Enrolment

Enrolment Summary:


Enrolment

Refresh Actions -

**Current Status:**  
This Enrolment has been submitted but is waiting for the Accreditation to be approved before it starts it's own approval process.

**Next Steps:**  
Please wait for the approval process to be completed.

**Enrolment - EN15616**



Link to the Accreditation summary page

Enrolment #: EN15616  
 Accreditation #: AC15942  
 Client Name: Midlands and Lancashire Commissioning Support Unit  
 Category: Care at Home (Merseyside)  
 Supplier Name: Test Sproc  
 Location: Test Sproc

---

Address Line 1: Test  
 Address City: London

**Additional Items**

- ▶ Printable Detail

Live Chat

**Documents** 9 Export

Document Type	File Name	Issue Date	Issue Number	Expiry Date
European Single Procurement Document	Information required.docx			
Financial Information	Training Document.docx			

**Questions** 1 - 50 of 64 Export

Question Type	#	Question	Answer
Company Information	1	Has your organisation completed the European Single Procurement Document?	Yes
Grounds for Discretionary Exclusion	2	Within the past three years, have any of the following situations applied, or currently apply, to your organisation: (a) your organisation has violated applicable obligations referred to in regulation 56 (2) of the Public Contracts Regulations 2015 in the fields of environmental,	

**Service Categories** 4

Service Category
Fast Track (End of Life)
Learning Disability
Mental Health
Physical Disability

**Messages** 0

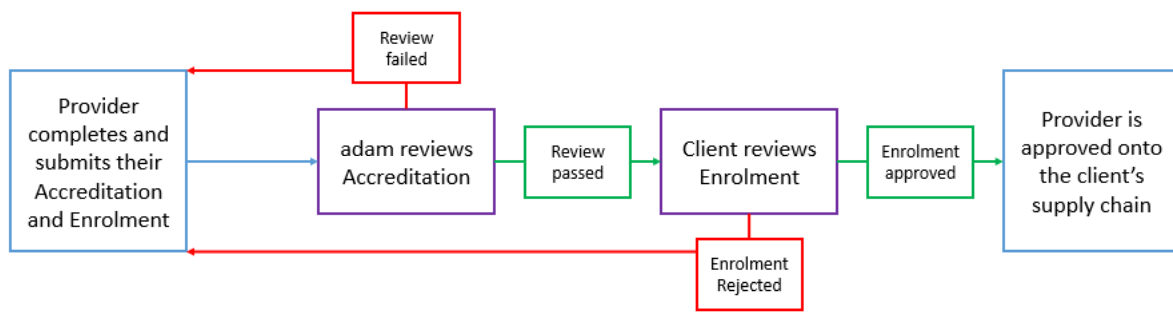
There are no records to display.

**Activity** 2

Activity Type	Date Created	Created By	Comments
Enrolment Submitted	03/03/2017 16:36	Test Supplier Admin	
Enrolment Created	03/03/2017 16:06	Test Supplier Admin	

## Review / Approval Process

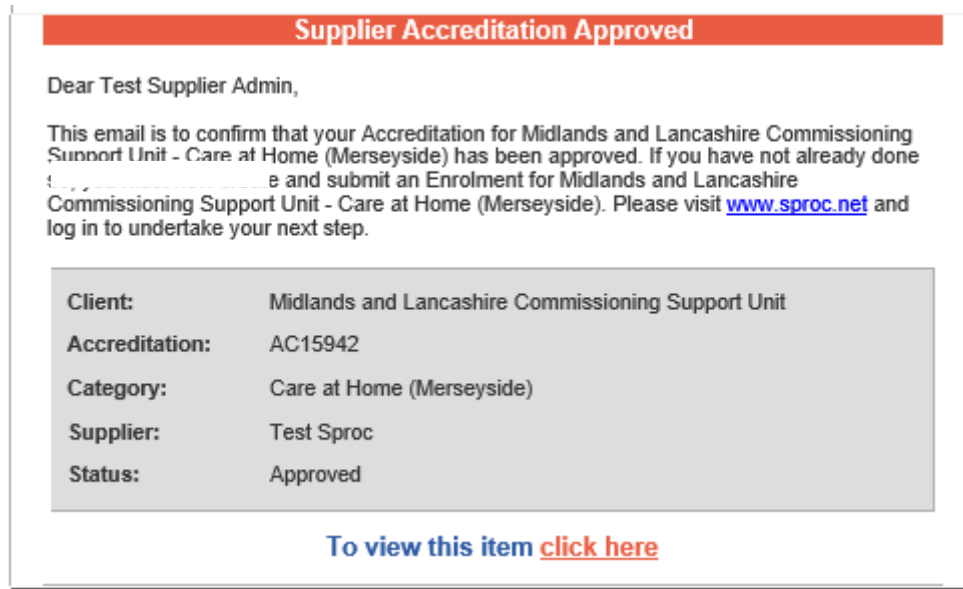
- ➔ Once you have completed the Accreditation and Enrolment process it will immediately go to *adam* for review
- ➔ The submitted Accreditation will be reviewed and approved by *adam*
- ➔ Then the Enrolment submission will be reviewed and accepted by *adam*
- ➔ Once *adam* has completed their review, the Enrolment will be sent to the CCGs for approval
- ➔ If there are any issues with either submission, then the item can be failed by *adam* or the CCGs and you will receive a notification email and will have the opportunity to edit and resubmit the failed item



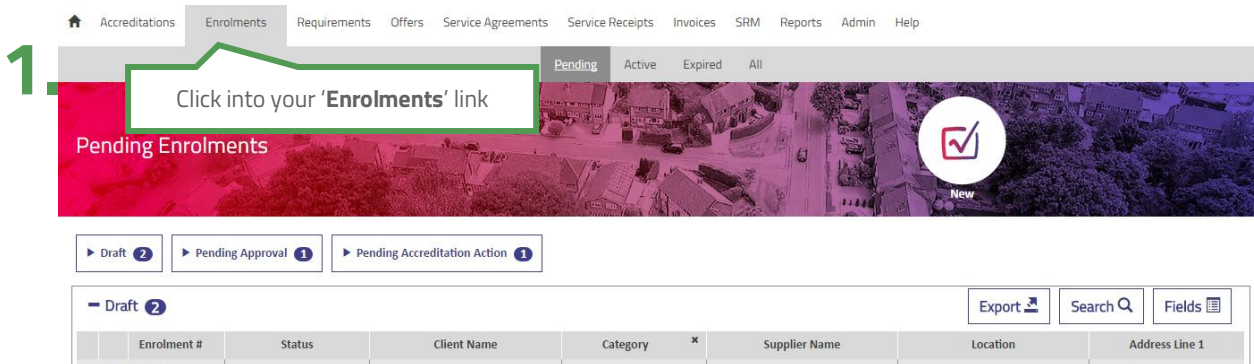


## Email Notifications

1. You will receive an email to inform you if your Accreditation/Enrolment application has been successful or not:



2. You will see all the details of your Accreditation/Enrolment when you log in to SProc.Net:



## Resubmitting a Failed or Rejected Enrolment

- ➔ The steps below show reviewing and re-submitting a failed or rejected Enrolment.
- ➔ The process to review and re-submit a failed Accreditation is exactly the same but starting from the 'Accreditations' tab on your SProc.Net homepage

1. If your Enrolment is failed, from your homepage:

1. Click 'Enrolments'

2. See any failed or rejected Enrolments by clicking 'Failed'

Enrolment #	Status	Client Name	Category	Supplier Name	Location	Address Line 1
EN15616	Review Failed	Midlands and Lancashire Commissioning Support Unit	Care at Home (Merseyside)	Test Sproc	Test Sproc	Test
EN6333	Review Failed	Birmingham City Council	Care Homes	Test Sproc	Test Sproc	Test

3. Use the search icon to select the Enrolment you wish to review.

2. This will show you the Enrolment summary page:

Current Status:  
This Accreditation has failed adam review.

Next Steps:  
Please use the "re-upload Docs & re-submit" option from the Actions menu to view the reasons for the failure and reupload any incorrect documents

Accreditation - AC15942 - Midlands and Lancashire Commissioning Support Unit

System Supplier

Accreditation #: AC15942  
Client Name: Midlands and Lancashire Commissioning Support Unit  
Category: Care at Home (Merseyside)  
Supplier Name: Test Sproc  
Status: Review Failed

Other Items

Printable Detail

3. Click the 'Printable Details' icon and a separate window will load.

Live Chat

3. This document will show you all the Enrolment information and the reason it failed.

Once reviewed and any required amendments or updates are made, you can resubmit your Enrolment.

4. From the Enrolment summary page:

Accreditation - London Borough of Haringey - Semi Independent Living

Refresh Actions

- New Enrolment
- Re-upload Docs & Re-submit

Current

This Accreditation has failed adam review.

To update the Enrolment information click '**Actions**' and '**Re-upload Docs & Re-submit**'

1.

Please use the "Re-upload Docs & Re-submit" option from the Actions menu to view the reasons for the failure and reupload any incorrect documents

5. Update the required information:

**Download Documents**

Document Type	Old File Name	Required	Review Passed	Failure Reason	Comments
NHS Standard Contract	Blank Document.docx	<input checked="" type="checkbox"/>	Yes		
Service Provider CQC Registration Certificate.	Blank Document.docx	<input checked="" type="checkbox"/>	Yes		
Evidence of Insurances	Blank Document.docx	<input checked="" type="checkbox"/>	No	Document/s not complete	Please upload your Employers Liability Insurance.
European Single Procurement Document		<input type="checkbox"/>	Yes		
Financial Documentation	London_Borough_Of_Newham_-_SEND	<input type="checkbox"/>	Yes		

Review feedback from *adam*

**Re-upload Documents**

Please upload new versions of the documents below where required. The pane above shows the details of the last review and should indicate which documents need to change

Document Type	Old File Name	New File Name	Issue Date	Issue Number
NHS Standard Contract	Blank Document.docx	<input type="text"/>	<input type="text"/>	<input type="text"/>
Service Provider CQC Registration Certificate.	Blank Document.docx	<input type="text"/>	<input type="text"/>	<input type="text"/>
Evidence of Insurances	Blank Document.docx	<input type="text"/>	31/01/2017	31/03/2017
European Single Procurement Document		<input type="text"/>	<input type="text"/>	<input type="text"/>
Financial Documentation	London_Borough_Of_Newham_-_SEND_-_Self_Billing_Agreement_Final_-_Filled 2014.pdf	<input type="text"/>	<input type="text"/>	<input type="text"/>

Using the upload icon, upload the revised documentation.

1.

Cancel **Finish** Click '**Submit**' to continue 2.

6. Confirm you agree to the terms and conditions.

To complete your Enrolment please click the Submit button below

Cancel **Save** Click '**Save**' to continue 3.

7. The Enrolment submission will have updated to show it has been re-submitted to *adam* for review:

Accreditation - South London SEN Commissioning - SEN Education Services

Refresh Actions

**Current Status:**  
This Accreditation is pending adam review.

**Next Steps:**  
Create a new Enrolment from the actions menu while waiting for adam to review this Accreditation. You will receive email updated when this happens

Accreditation status updated



## Creating a New User

- Once you have set-up your SProc.Net account, you can create additional users who can access your system and complete steps within the process

There are two ways a new user can be added:

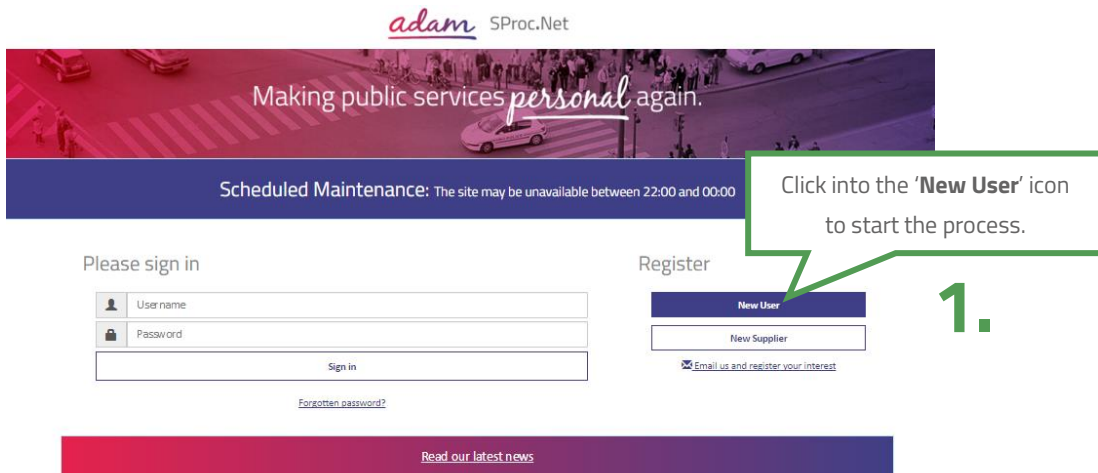
- a) New user can request to join (user will input their own information and Administrator will approve)
- b) Admin user can add user onto SProc.Net

The next section of this guide will take you step-by-step through both of the above methods of adding a user to your SProc.Net system.

### New User Request – Created by the new user

Created by the user:

1. Select '**New User**' from the login page:



The screenshot shows the SProc.Net login page. At the top, the logo 'adam SProc.Net' is displayed. Below it is a banner with the text 'Making public services *personal* again.' and a 'Scheduled Maintenance' notice. The main content area is divided into two sections: 'Please sign in' and 'Register'. The 'Please sign in' section contains fields for 'User name' and 'Password', a 'Sign in' button, and a 'Forgotten password?' link. The 'Register' section contains a 'New User' button, a 'New Supplier' button, and a checkbox for 'Email us and register your interest'. A green callout box with a pointer to the 'New User' button contains the text 'Click into the 'New User' icon to start the process.' A large green number '1.' is placed to the right of the callout box.

2. This will direct you to the new user details page:

The screenshot shows a 'New User Registration' form with the following sections and callouts:

- Section 1: Business Details**
  - Instruction: "Please select either Client or Supplier dependent on the company you work for. Then use the search field to select the company."
    - Field: "User Role: \*" (dropdown menu)
- Section 2: About You**
  - Instruction: "Please provide a your personal details below."
    - Field: "First Name: \*" (text input)
    - Field: "Last Name: \*" (text input)
    - Field: "Email Address: \*" (text input) - Callout 2: "Input all your details. 2." points to this field.
    - Field: "Phone #: (Telephone number)" (text input)
    - Field: "Locations: \*" (text input with search icon) - Callout 3: "Input further information for the approver to review." points to the 'Additional Information' section below.
- Section 3: Additional Information**
  - Instruction: "Please provide any additional information that will assist your company's system administrators in approving your new user registration."
    - Field: "Additional Information:" (large text area)
- Buttons**
  - "Cancel" button
  - "Register" button - Callout 4: "Click 'Register' to complete." points to this button.

Once this form has been completed by you, your Administrator(s) will receive an email notification informing them that there is a New User request on the system.


## Approving a New User

1. **Administrator:** login to your account and from the homepage, expand the 'Admin' tab on your toolbar
2. This will take you to a list view of all your users
3. Click into the new user to view their details

1.

Click 'Admin' and then 'Users'

2.

Clicking the  icon will take you to that user's information page.

Name	Email Address	User ID	Quality Care
11		11	Quality Care
Alison Maclean		alisonmaclean	Quality Care
Ben Little	christine.maclean@attgo-training.com	benlittle	
Christine Smith			
David Smith		dsmith873	Quality Care
David Smith		dsmith460	Quality Care
Drew Goodchild	ccistine.maclean@attgo-training.com	ccistine.maclean@attgo-training.com	Quality Care
Drew Goodchild	ccistine.maclean@attgo-training.com	drewgoodchild	Quality Care

4. View the user's details

3.

Click the user's name link.

User - Drew Goodchild (Quality Care)

Refresh Actions

**Drew Goodchild (Quality Care)**

Drew Goodchild  
Quality Care  
Status: Registered  
Role: Supplier  
Updated: 07/04/2016 11:34

Email: ccistine.maclean@attgo-training.com  
Telephone:  
Last Login:

Actions

Standard Notifications **169** Community Reviews

Notes **0** New

There are no records to display.

Review their details and select their account settings:

Please note, all 'Role Names' must be assigned correctly to reflect authorisation levels within your business.

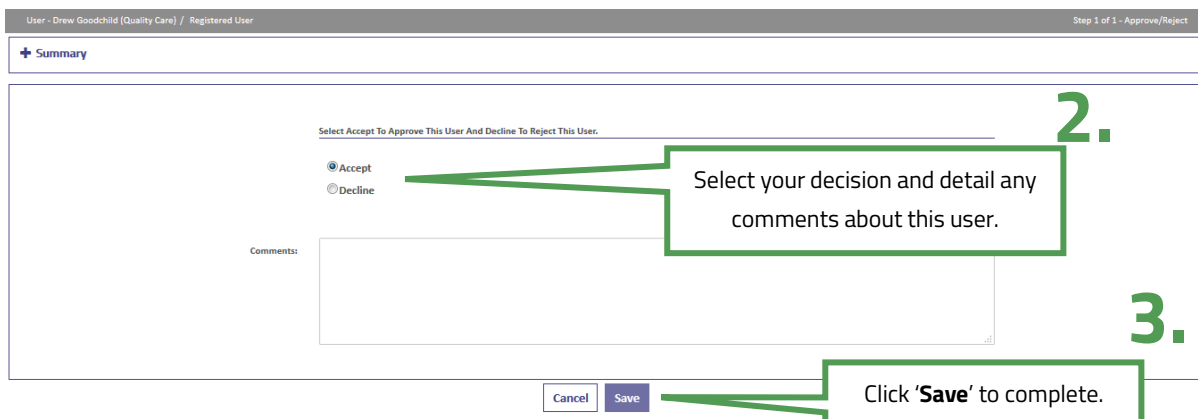
Role Name	Access	Example
<b>Supplier Administrators</b>	Access to view & approve all process steps	Supply branch manager
<b>Supplier Executives</b>	Access to view & approve all process steps within a defined service area	Head of service with supply branch
<b>Supplier Finance</b>	Access to view supplier bills and invoices	Finance Manager
<b>Supplier Managers</b>	Access to use all system steps	Supplier employee
<b>Supplier Users</b>	Access to use authorised system steps	Supplier employee

Table 1.0

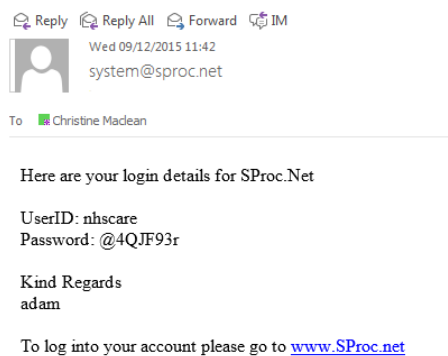
5. Once complete you will need to approve the user:



6. Accept or decline the new user application:



7. If approved, this process will trigger an email to this new user informing them of their new username and password:





## New User Creation – By System Administrator

Alternatively, you as the Administrator can create and add new users to your system:

1. Login to your SProc.Net system
2. From your homepage click into the 'Admin' tab on your toolbar
3. Select the 'Users' link
4. Select the 'New' icon

1.

Click 'Admin' and then 'Users'

2.

Clicking the 'New' icon will take you to the new user page.

Name	Email Address	User ID	Location	Role Name
11		11	Quality Care	SupplierManagers
Alison Maclean		alisonmaclean	Quality Care	SupplierAdministrators

5. Complete the user's details and role:

3.

4.

Input the user's details.

Use the icon to select the user's access level.

5.

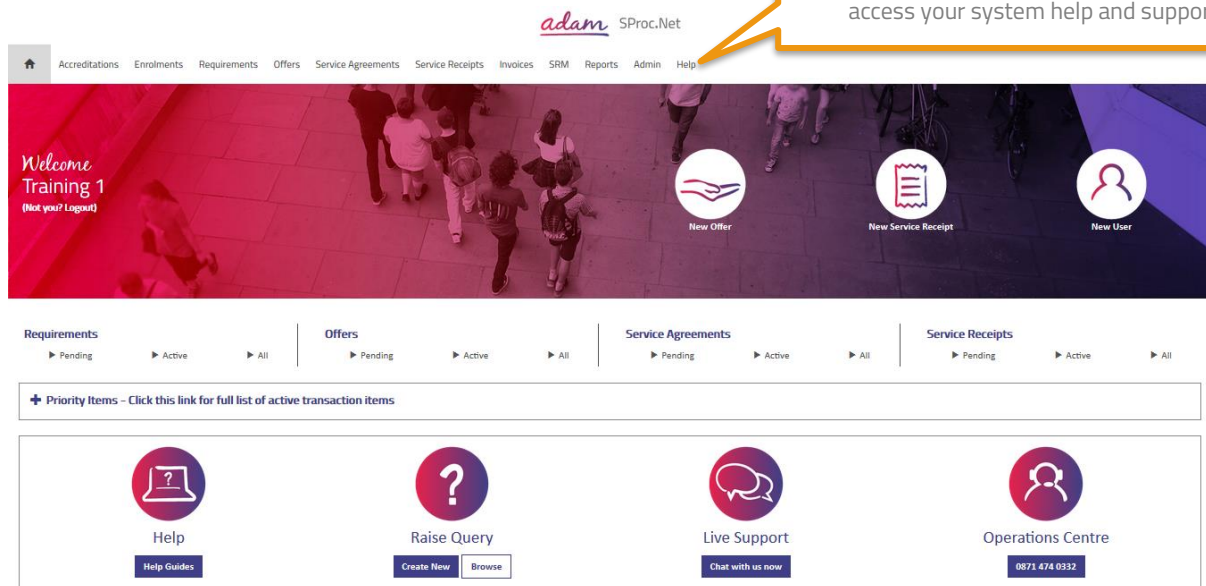
Click 'Save' to complete.

See Table 1.0 on page 27 for User Role explanations

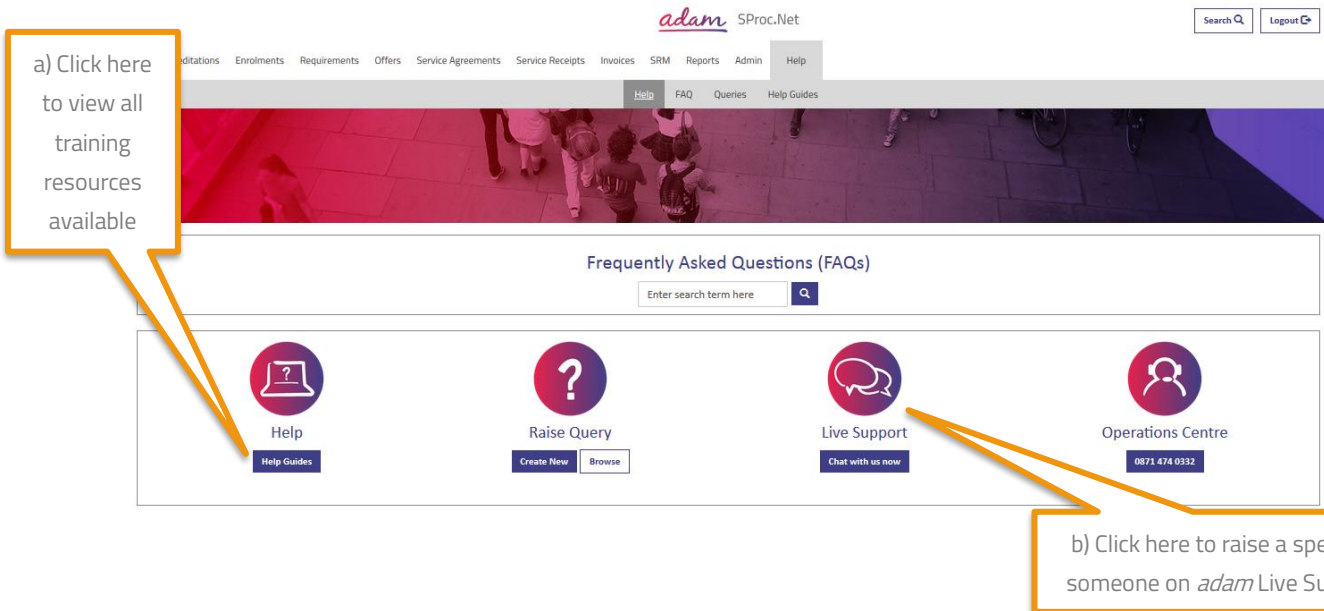
6. This process will trigger an email to this new user informing them of their new username and password:

## Need More Support?

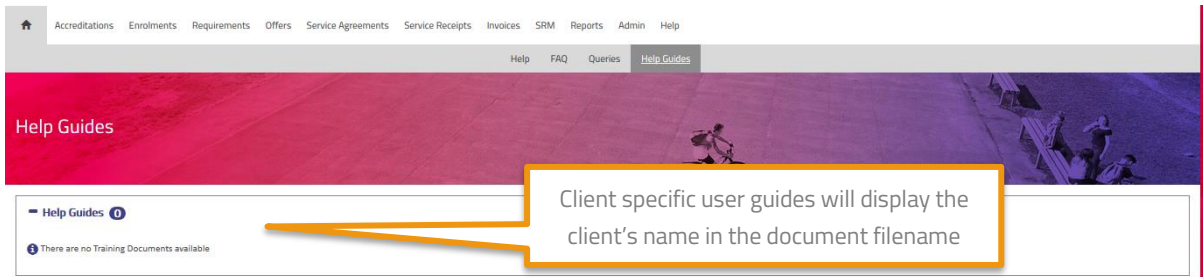
If you need more support regarding anything detailed in this guide, please use the help functions available within your SProc.Net account:



You will be taken to our Help Library where you have a number of different ways of finding the answer to any questions you may have:



a) Training Guides / Documents / Videos are available for you to view and use as support:



b) Live Support will allow you to speak with a member of the *adam* operation team:

