



adam

Brighton & Hove City Council

Accreditation & Enrolment User 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, Brighton and Hove City Council with the Supply Categories, 'Day Opportunities', 'Supported Living' and 'Community Support'.



Provider



**Completes
Accreditation**



**Completes
Enrolment**

Once completed and approved by Brighton and Hove, a provider will be added to the specified supply base. Going forward, the provider will receive notifications of service Requirements distributed by the council and they will have to 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

New Supplier	A provider who has never used the SProc.Net system before
Supply Category	This is the over-arching service sector/type of service, e.g. Day Opportunities, Care Homes, Home Support etc.
Service Category	The Supply Category is broken down into smaller Service Categories. E.g. 'Care Homes' can be broken down into 'Challenging Behaviour', 'Dementia', etc.
Service Template	Service title, outlining the type of service required
Registration	Process to gain access to SProc.Net – Username and password
Accreditation	An objective evaluation based on a set of defined criteria
Enrolment	A subjective evaluation based on a set of defined criteria
Draft	Saved workings but process incomplete
User	An employee who manages services procurement through SProc.Net
Administrator	A system user with the highest level of access

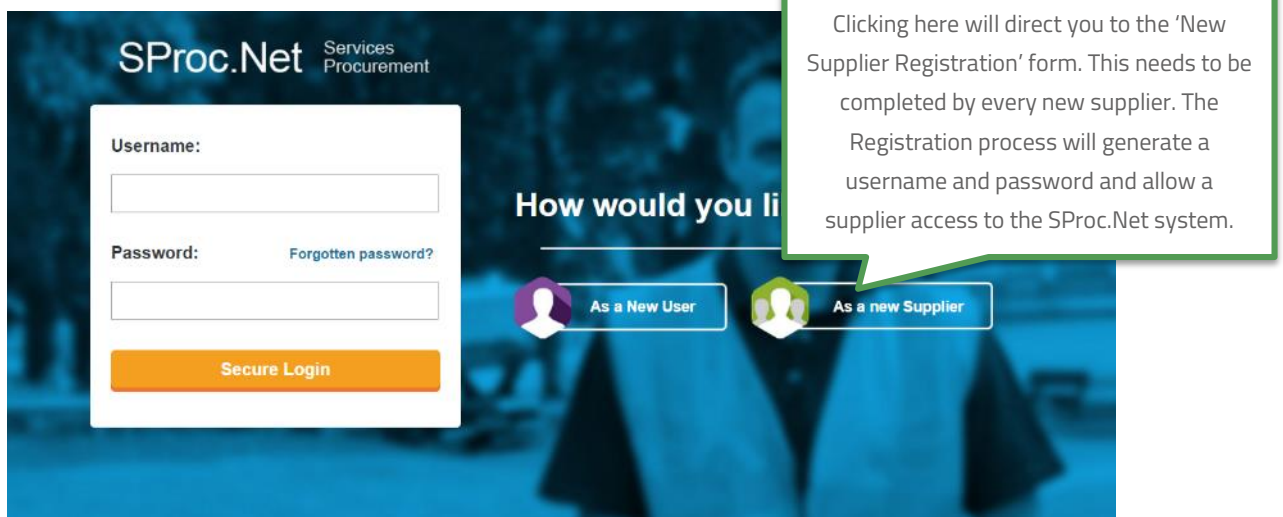
System Icons

	All fields displaying this icon MUST be completed to continue to the next stage in the process.
	The magnifying glass indicates the section needs to be populated by pre-set information, found by clicking this icon. A separate window will appear with a list of options / answers from which to choose.
	The right pointing arrow is the icon used to select a pre-populated answer or statement from the separate window that appears when you use the above  function.
	Any information, statements or answers pre-populated or populated in error can be removed using this rubbish bin icon.
	The down pointing arrow will provide a dropdown selection of answers for the user to choose from when answering questions / statements.
	This upload icon will provide a separate window for users to search their computer documents and select which are required / asked for during this process.
	If you click on the question mark, a small window containing further information about what is required during a specific section will appear.

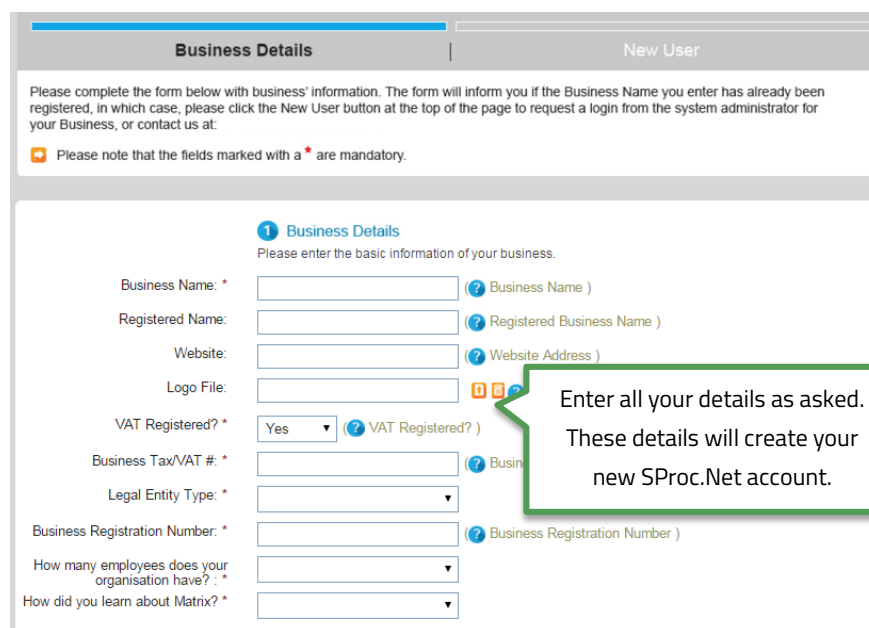
Registration

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 9).

1. Go to the SProc.Net website: www.SProc.net
2. The SProc.Net login page contains the links to register 'As a New Supplier':



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



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 Supplier Administrator for your SProc.Net system. They will have full access to tailor the system and can create further 'users' within the SProc.Net system at a later stage. This user can also create other administrators who will have full access (details on page 27):

- 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:

Reply Reply All Forward IM



Wed 09/12/2015 11:42
system@sproc.net

To Christine Maclean

Here are your login details for SProc.Net

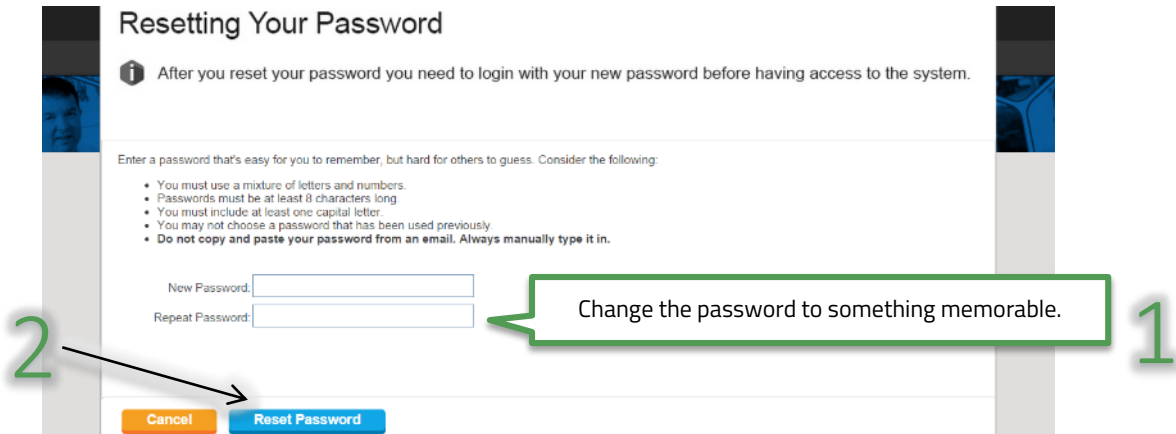
UserID: nhscare
Password: @4QJF93r

Kind Regards
adam

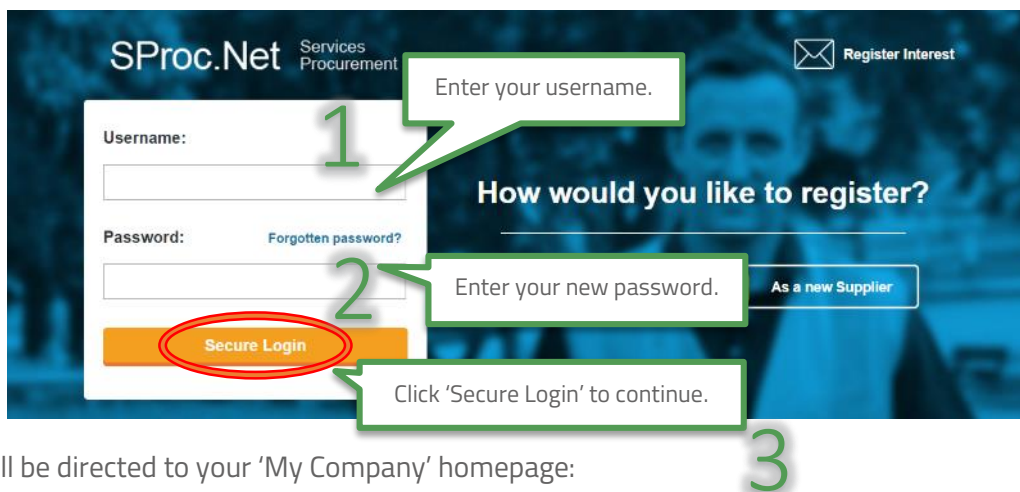
To log into your account please go to www.SProc.net

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

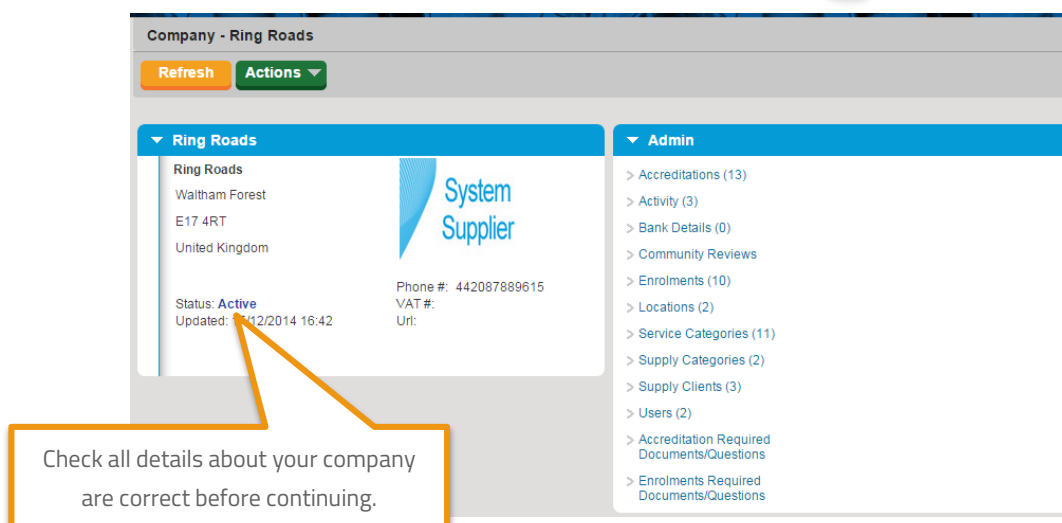
- From the SProc.Net login page, login using the username and password provided. There will be an automatic prompt to change your password:



- Click 'Reset Password' and the system will navigate back to the SProc.Net login screen
- Login using the given username and new password and click 'Secure Login':



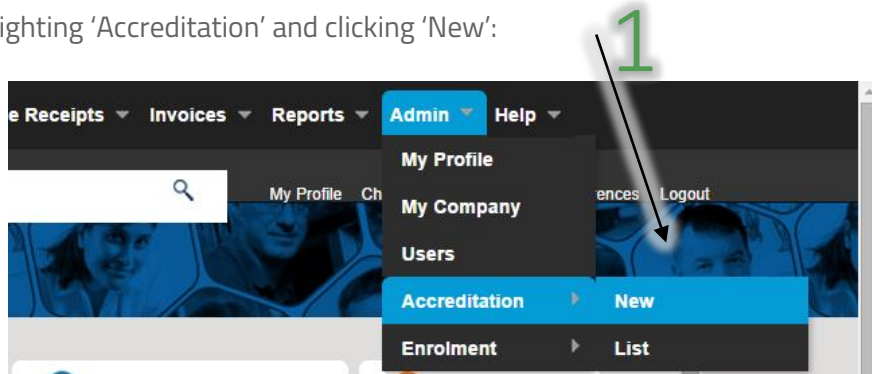
You will be directed to your 'My Company' homepage:



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 details and questions being answered, these are set by the client as a standards threshold / minimum criteria.

1. Start this process from your homepage, hover over the 'Admin' icon on the grey toolbar, highlighting 'Accreditation' and clicking 'New':



2. Populate the required fields:

3 The drop down tab will display the category Brighton and Hove City Council procures through SProc.Net. Select the category you wish to supply services.

2 The drop down tab will provide a list of all clients who procure services through SProc.Net. Select the client to which you wish to supply services.

4 Navigate through by clicking 'Next'

Notes:

What is a Supply Category?

A Supply Category refers to the Service Area. For example "Day Opportunities"

- ➔ Within SProc.Net Accreditation and Enrolment is individual to each client's 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/category separately.

- On the next page you will be required to answer a series of objective questions, provide supporting documentation and agree to the contractual documents:

Company - True Care > Accreditation - Additional Information Step 2 of 6

+ Accreditation

- Contracts

In order to submit this Accreditation you must first review and agree to the documents listed below. Please note that these are legally binding documents and by ticking the 'I agree to the Terms of the document' box you are confirming that you and your business agree to all terms and conditions set out within the document(s) provided. By ticking the 'I am authorised to agree' box you warrant that you have the requisite authority to approve this document on behalf of your business to bind the business to those terms and conditions.

Document Type	Download File	I Agree To The Terms Of The Document	I Am Authorised To Agree
Self Bill Agreement	Download File	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Supplier Agreement	Download File	<input type="checkbox"/>	<input type="checkbox"/>

Save

- 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	Can your organisation confirm that it has read and understood the entry guide and selection criteria guide for the procurement of Day Opportunities/Community Support/Supported Living, which is located at http://demand.sproc.net/ ? These are both very important documents to read prior to applying to become an approved provider.	<input type="checkbox"/> No <input checked="" type="checkbox"/> Yes	
Company Information	2	If applicable, please enter the name of your organisation's immediate parent company. If this is not applicable, please enter N/A.	<input type="text"/>	4000 left
Company Information	3	If applicable, please enter the name of your organisation's ultimate parent company. If this is not applicable, please enter N/A.	<input type="text"/>	4000 left
Company Information	4	Does your organisation provide a minimum of the Living Wage for all staff as defined at http://www.brighton-hove.gov.uk/content/business-and-trade/brighton-hove-living-wage-commission-our-commitment-living-wage/ ?	<input type="text"/>	
Grounds for Mandatory Exclusion	17	Please self-certify that you have an Inclusion and Diversity policy and will provide the policy as and when requested.	<input type="text"/>	
Grounds for Mandatory Exclusion	18	Please self-certify that you have a Medication policy and will provide the policy as and when requested.	<input type="text"/>	
Grounds for Mandatory Exclusion	19	Please self-certify that you have a Business Continuity policy and will provide the policy as and when requested.	<input type="text"/>	
Grounds for Mandatory Exclusion	20	Please self-certify that you have a Staff Training policy and will provide the policy as and when requested.	<input type="text"/>	
Grounds for Mandatory Exclusion	21	Please self-certify that you have a Duty of Candour Policy and will provide the policy as and when requested.	<input type="text"/>	
Insurances	22	Can your organisation confirm that it has Employers Liability Insurance to the level of £10 million.	<input type="text"/>	
Insurances	23	Can your organisation self-certify that you will obtain Employers Liability Insurance to the level of £10 million before the commencement of any contract?	<input type="text"/>	
Insurances	24	Can your organisation confirm that it has Public Liability Insurance to the level of £10 million.	<input type="text"/>	
Insurances	25	Can your organisation self-certify that you will obtain Public Liability Insurance to the level of £10 million before the commencement of any contract?	<input type="text"/>	

Save

- 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 before submission.

Document Type	File Name	Issue Date	Issue Number	Expiry Date	Description
Employer's Liability Insurance	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	The document must show the name of organisation, expiry date and cover. If you have self-certified you will get the required level you will get the required level upload a blank document.
Public Liability Insurance	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	The document must show the name of organisation, expiry date and cover. If you have self-certified you will get the required level you will get the required level upload a blank document.

Save

Cancel **Next**

1
Click into the document files to download the Self Bill Agreement & Supplier Agreement documents. Once read and understood you must tick to authorise that

2
Answer all questions using the drop-down options provided.

3
If applicable upload the requested documents.

4
Using the calendar icons, add the document's issue and expiry dates.

5
Click 'Next' to proceed

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.

- Confirm you have read and understood all terms and conditions:

- SProc.Net will direct you straight into the Enrolment process

- Select the location you wish to enrol to:

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

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

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	Please enter the name and contact details of the most senior member of staff to contact in the event of a serious issue arising both during office hours and out of office hours.	<input type="text"/>	4000 left
Company Information	2	Please provide the name and contact details of the person responsible for Safeguarding within your organisation.	<input type="text"/>	
Company Information	3	Do you provide a regulated activity as defined by the CQC?	<input type="text"/>	
Company Information	4	Does the registered location have a current registered manager?	<input type="text"/>	
Company Information	5	Please enter the name and contact details of the current registered manager.	<input type="text"/>	
Grounds for Discretionary Exclusion	6	Please explain why your organisation does not have a current registered manager and if necessary, what steps your organisation is taking to rectify this situation.	<input type="text"/>	
Economic and Financial Standing	37	(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 of the above are not available (e.g. Forecast of turnover for the current year and a statement of funding provided by the owners and/or the bank, charity accruals accounts or an alternative means of demonstrating financial status).	<input type="text"/>	1

Save Remember to 'Save' after you complete each section

Answer all of the Enrolment questions using responses provided. These answers will be reviewed by Brighton and Hove City Council.

There are 37 questions in total, some 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.

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 each one before submission.

Document Type	File Name	Issue Date	Expiry Date	Description
Service Provider CQC Registration Certificate	<input type="text"/>	<input type="text"/>	<input type="text"/>	Please upload your Service Provider CQC Registration Certificate, this must show both the Provider ID and the Location ID.
Financial Information	<input type="text"/>	<input type="text"/>	<input type="text"/>	If you are a sole trader or Partnership please upload one of the following to demonstrate your financial status: (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 of the above are not available (e.g. Forecast of turnover for the current year and a statement of funding provided by the owners and/or the bank, charity accruals accounts or an alternative means of demonstrating financial status).

Save Remember to 'Save' after you complete each section

If applicable upload the requested documents.

Using the calendar icons, add the document's issue and expiry dates.

- ➔ 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.
- ➔ At this point, only Learning Disabilities packages will be commissioned through SProc.Net.

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

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

The screenshot shows a 'Service Categories' modal window. On the left, a 'Find more items...' button is highlighted with callout 1. On the right, the modal contains search filters (Service Category, Supply Category, Sort by), action buttons (Find, Add, Add All, Done), and a table of categories. The 'Learning Disability Support' category has a checked checkbox, and 'Day Opportunities' has an unchecked checkbox. Callout 2 points to the 'Add' and 'Done' buttons.

Finally you will need to input your company bank details for the account to which you wish payments to be made:

3 Input all your bank details

4 Make sure you click a tick into the T&Cs box

5 Click 'Finish' to continue

The screenshot shows the 'Bank Details' form. It has two sections: 'Bank Details' and 'Invoice Contact'. The 'Bank Details' section includes fields for Bank Name, Account Name, Sort Code, and Account Number. The 'Invoice Contact' section includes fields for Name, Address, and Contact Information. At the bottom, there is a checkbox for 'I agree that I am certified to accept responsibility for submitting this information on behalf of my business *'. Callout 3 points to the input fields, callout 4 points to the checkbox, and callout 5 points to the 'Finish' button.

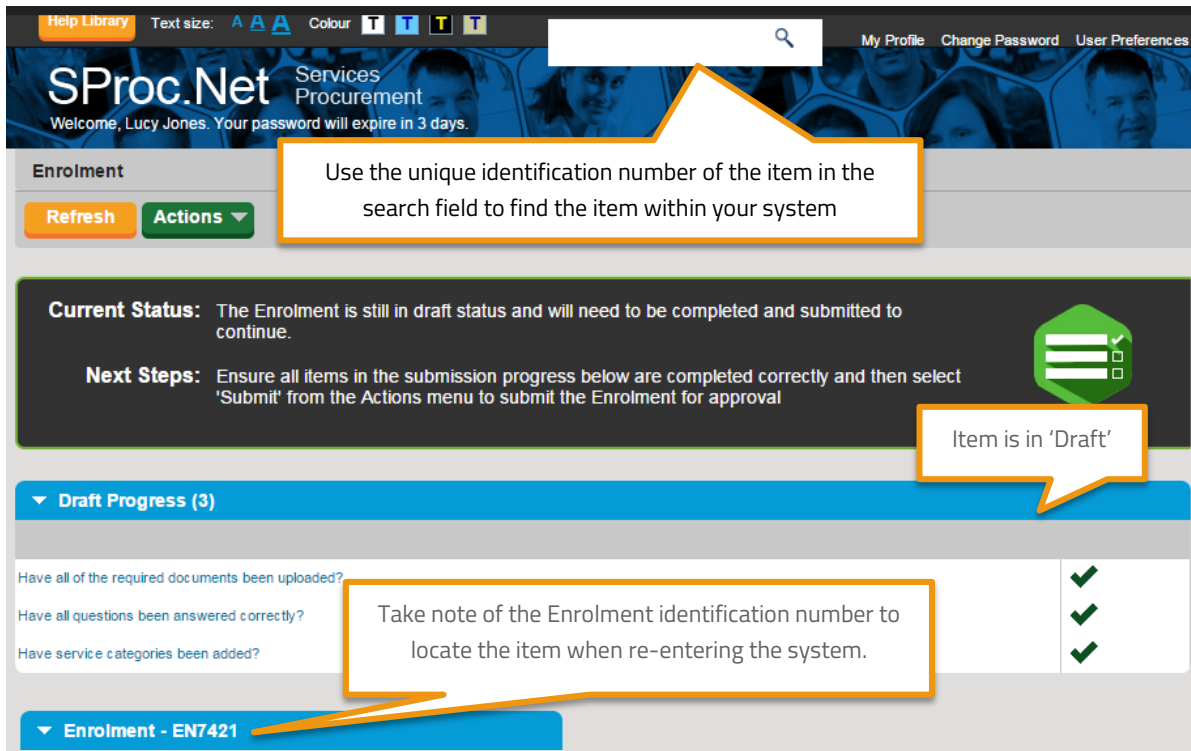
9. To complete:

6 Click 'Submit'

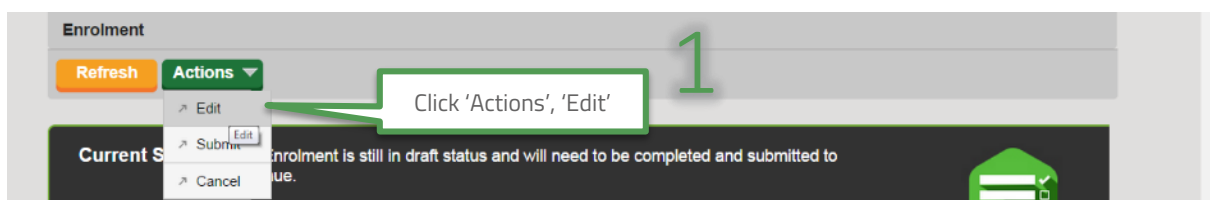
The screenshot shows a final confirmation screen with the text 'To complete your Enrolment please click the Submit button below' and a 'Submit' button. Callout 6 points to the 'Submit' button.

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:

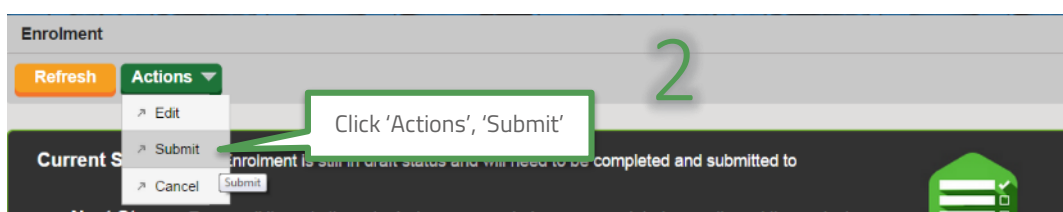


1. From the Enrolment summary page, to edit the information click into the 'Actions' icon:

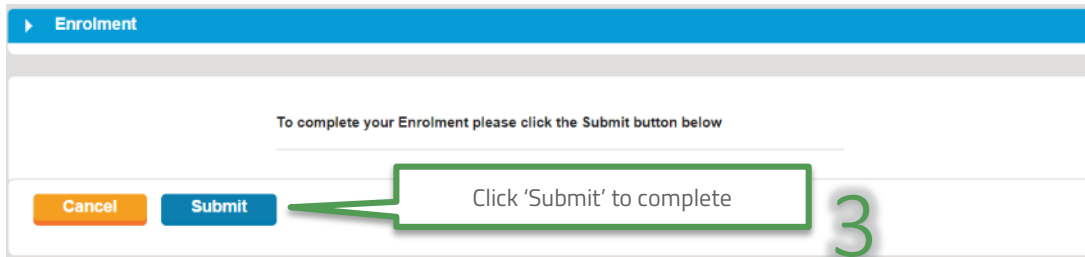


Edit the information as needed, replacing any draft text/characters previously used to save.

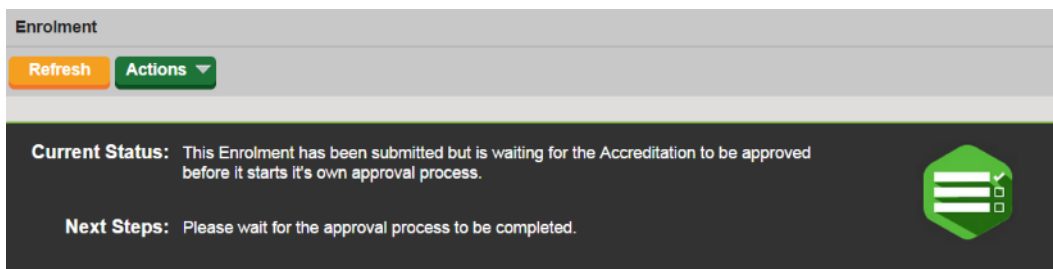
2. This process can be repeated as many times as needed, clicking  frequently to save your current workings.
3. When complete use the 'Actions' icon to 'Submit':



4. Click 'Submit' to complete:



5. 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:


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 - EN8785



Link to the Accreditation summary page

Enrolment #: EN8785

Accreditation #: [AC12853](#)

Client Name: Brighton and Hove City Council

Category: Day Opportunities

Supplier Name: True Care

Location: True Care

Address Line 1: 45 Southend Street

Address City: Southend

County: Buckinghamshire

Address Post Code: MK160EE

Country: United Kingdom

Status: Accreditation Pending Review

Bank Details

Bank Name: Nationwide

Account Name: CV Maclean

Sort Code: 432323

Account Number: 21223212

Invoice Contact Name:

Address Line 1: 55 Westover Rd

Address Line 2:

Address City: Milton Keynes

Post Code: MK160PR

County: Buckinghamshire

Country: United Kingdom

Email Address: christine.maclean@matrix-scm-training.com

Email Address 2:

Address Phone: 01494 574236


Effective Date: 01/01/2016

Date Updated: 17/01/2016 15:18


Updated By: Care Manager

Additional Items

Printable Detail

Documents (2) 

Document Type	File Name	Issue Date	Issue Number	Expiry Date
Service Provider OGC Registration Certificate	Training Document.docx			
Financial Information	Training Document.docx			

Questions (37) 

Accreditation Summary:

Accreditation - Brighton and Hove City Council - Day Opportunities

[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 - AC12853 - Brighton and Hove City Council

Accreditation # : AC12853
Client Name : Brighton and Hove City Council
Category : Day Opportunities
Supplier Name : True Care
Status : Pending Review

Other Items

Printable Detail

Contracts (2)

Document Type	Download File	I Agree To The Terms Of The Document	I Am Authorised To Agree
Self Bill Agreement	Download File	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Supplier Agreement	Download File	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Documents (2)

Document Type	File Name	Issue Date	Issue Number	Expiry Date
Employer's Liability Insurance	insurance.docx			
Public Liability Insurance	insurance.docx			

Questions (25)

Question Type	#	Question Text	Answer	Expiry Date
Company Information	1	Can your organisation confirm that it has read and understood the entry		

Link to the Enrolment summary page

Activity (2)

Activity Type	Created By	Comments
Accreditation Submitted	Care Manager	
Accreditation Created	Care Manager	

Enrolments (1)

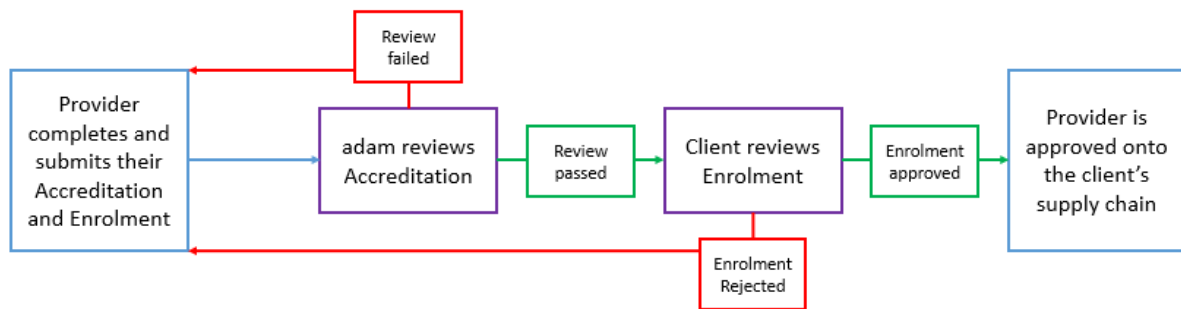
Enrolment #	Status	Client Name	Category	Location
EN8785	Accreditation Pending Review	Brighton and Hove City Council	Day Opportunities	True Care

Messages (0)

i There are no records to display.

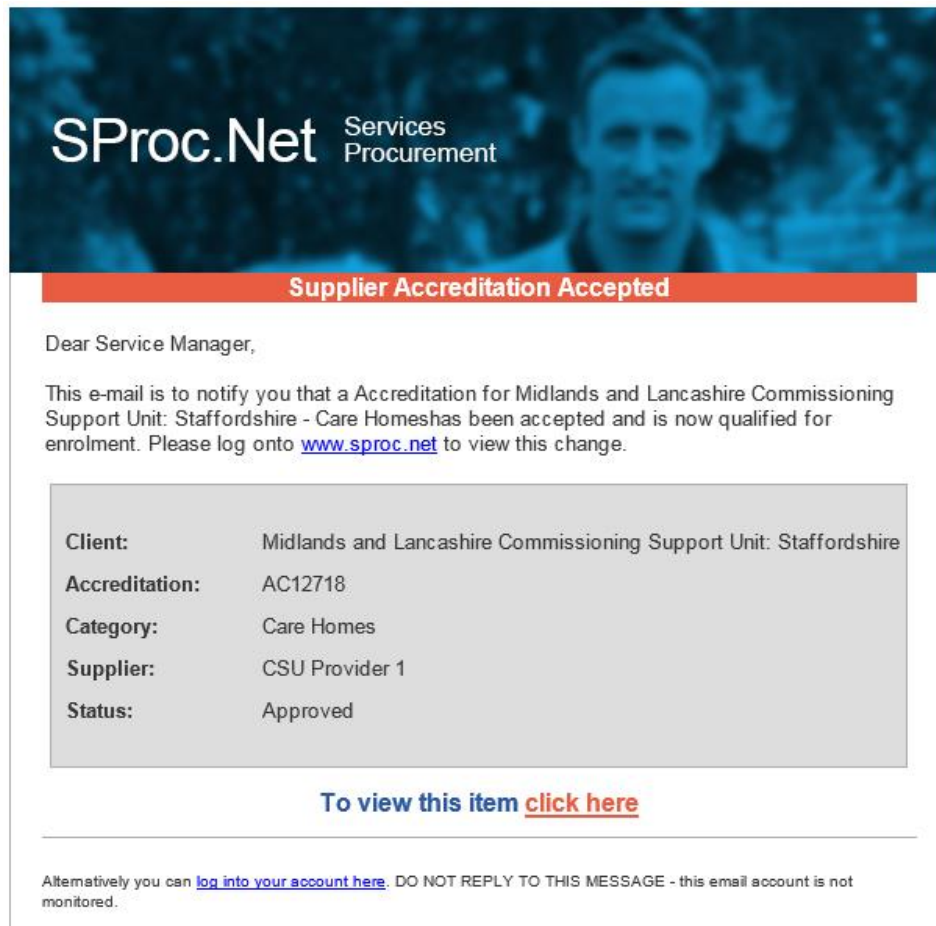
Review / Approval Process

- ➔ 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 Brighton and Hove City Council for approval
- ➔ If there are any issues with either submission, then the item can be failed by *adam* or the council and you will receive a notification email and will have the opportunity to edit and resubmit the failed item

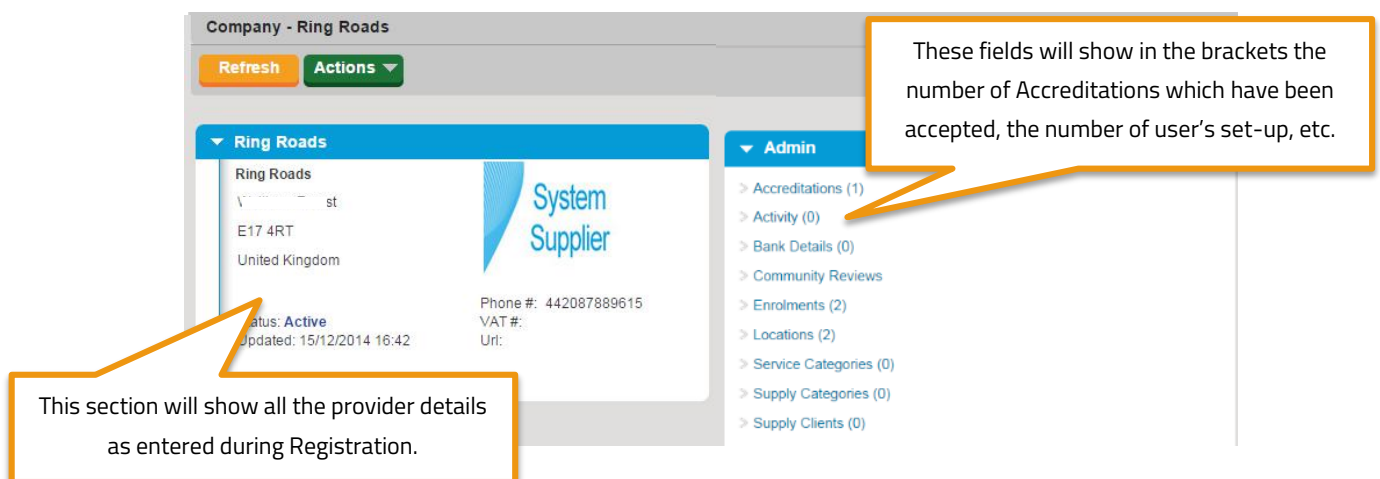


Email notifications

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

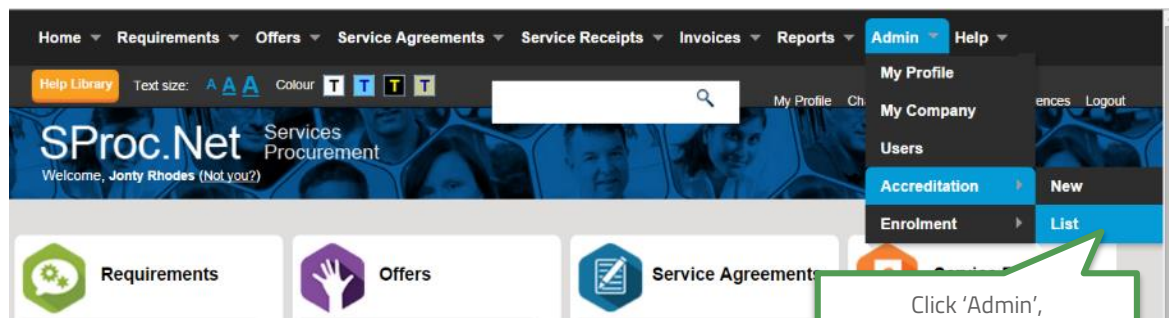


2. You will see all the details of your Accreditation/Enrolment when you login to SProc.Net:

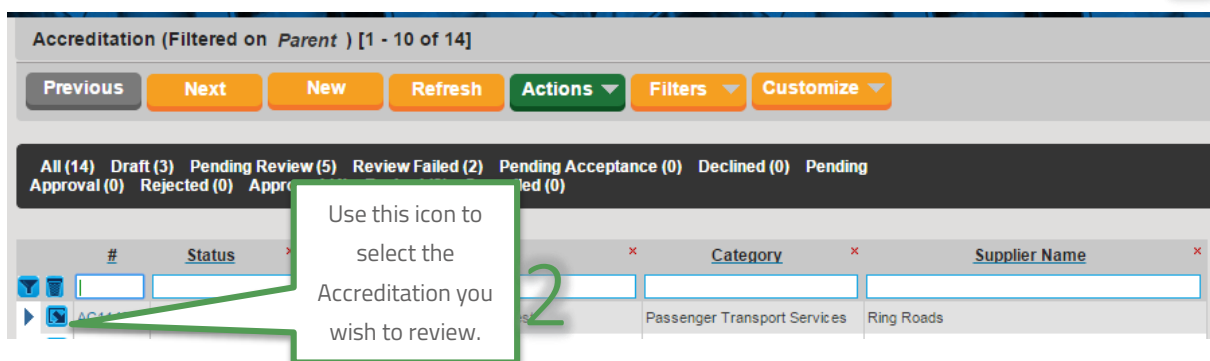


Resubmitting a Failed Accreditation

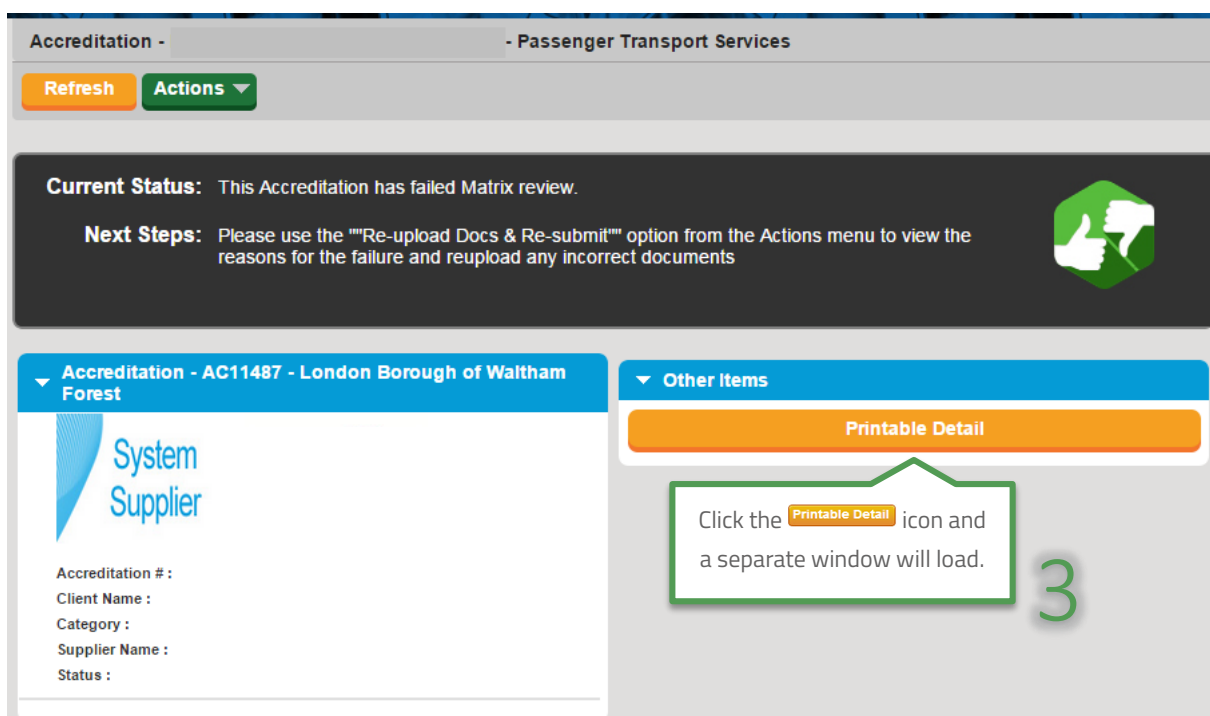
1. If your Accreditation is failed, from your homepage:



2. This will show you a list view of all of your Accreditations:



3. This will show you the Accreditation summary page:



4. This document will show you all the Accreditation information and the reason it was failed:

IfnVocab(Accreditation, accreditation, P) Detail Report SProc.Net
Services Procurement

IfnVocab(Accreditation, accreditation, P)
#: 11487 **Status: Review Failed**

Client: London Borough of
Category: Passenger Transport Services

Supplier: Ring Roads
Status: Review Failed

Description:
Created by: Lucy Jones
Created: 15/12/2014 16:59
External Ref.
Expiry Date:
Expired: False
Approve by Date:
Date Approved:
Date Submitted: 15/12/2014 17:19

Question Type	Question	Answer
Professional Standing	Can your organisation confirm that all staff that are used in the performance of this contract will have at least 2 years' experience in delivering the required service?	Yes
Safeguarding	Can your organisation confirm that it agrees to comply with the contents of the Council's Safeguarding document (please see link) and that it will complete all the required checks in respect of all workers deployed to work under this agreement and that it will provide the Council with the information required?*	Yes
Safeguarding	Can your organisation confirm that it has a robust Disclosure and Barring Service disclosure policy and procedure in place for dealing with disclosures, including those that contain information ('positive' disclosures)? Its policy and procedure, at a minimum, needs to meet the same standards as the Council (please see link).	Yes
Health & Safety	Can your organisation confirm that it has read and understood the Council's Health and Safety policy (please see link) and that it is already operating to, at least, the same standards or that it will be operating to these standards before a contract is awarded?*	Yes

Documents - Current

Document Type	Filename	Last Review Date	Issue Date	Issue Number	Expiry Date	Review Passed	Comments	Reason
Employer's Liability Insurance	TEST DOCUMENT.docx	16/12/2014 10:45	01/10/2014 00:00		01/10/2015	False	please upload an indate document	Incorrect Document
Public Liability Insurance	TEST DOCUMENT.docx	16/12/2014 10:45	01/10/2014 00:00		01/10/2015	True		
Supplier Agreement	ANNABEL test document	16/12/2014 10:46				True		
Self Bill Agreement	ANNABEL test document	16/12/2014 10:46	01/08/2014 00:00		01/08/2015	True		
Bank Details Form	TEST DOCUMENT.docx	16/12/2014 10:46				True		
Equal Opportunities and Diversity Policy	TEST DOCUMENT.docx	16/12/2014 10:46				True		
CRB/DBS Form	TEST DOCUMENT.docx	16/12/2014 10:46	01/12/2014 00:00	1	01/12/2015	True		

This IfnVocab(Accreditation, accreditation, P) contains no historical documents

Activity

Activity	Activity Date	User	Comments
Accreditation Review Failed	16-Dec-2014	Annabel Wilmot	
Accreditation Submitted	15-Dec-2014	Lucy Jones	
Accreditation Created	15-Dec-2014	Lucy Jones	

1 of 1 User: lucyjones 16-Dec-2014 10:47

Review the details of why the Accreditation was failed.

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

5. From the Accreditation summary page:

Home Requirements Offers Service Agreements Service Receipts Invoices Reports Admin Help

Help Library Text size: A A A Colour T T T T

SProc.Net Services Procurement
Welcome, Jonty Rhodes (Not you?)

Accreditation

Refresh Actions

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

Current S... filed Matrix 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

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

1

6. Update the required information:

Accreditation - Passenger Transport Services > Re-upload Documents Step 1 of 1

Download Documents

Document Type	Old File Name	Review Passed	Failure Reason	Comments
Employer's Liability Insurance	TEST DOCUMENT.docx	No	Incorrect Document	please upload an indate document
Public Liability Insurance	TEST DOCUMENT.docx	Yes		
Supplier Agreement	ANNABEL test document 13.0	Yes		
Self Bill Agreement	ANNABEL test document 13.0	Yes		
Bank Details Form	TEST DOCUMENT.docx	Yes		
Equal Opportunities and Diversity Policy	TEST DOCUMENT.docx	Yes		
CRB/DBS Form	TEST DOCUMENT.docx	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 need to change

Document Type	Old File Name	New File Name	Issue Date	Issue Number	Expiry Date
Employer's Liability Insurance	TEST DOCUMENT.docx	<input type="text"/>	01/10/2014	<input type="text"/>	01/10/2015
Public Liability Insurance	TEST DOCUMENT.docx	<input type="text"/>	01/10/2014	<input type="text"/>	01/10/2015

Using the upload icon, upload the revised documentation.

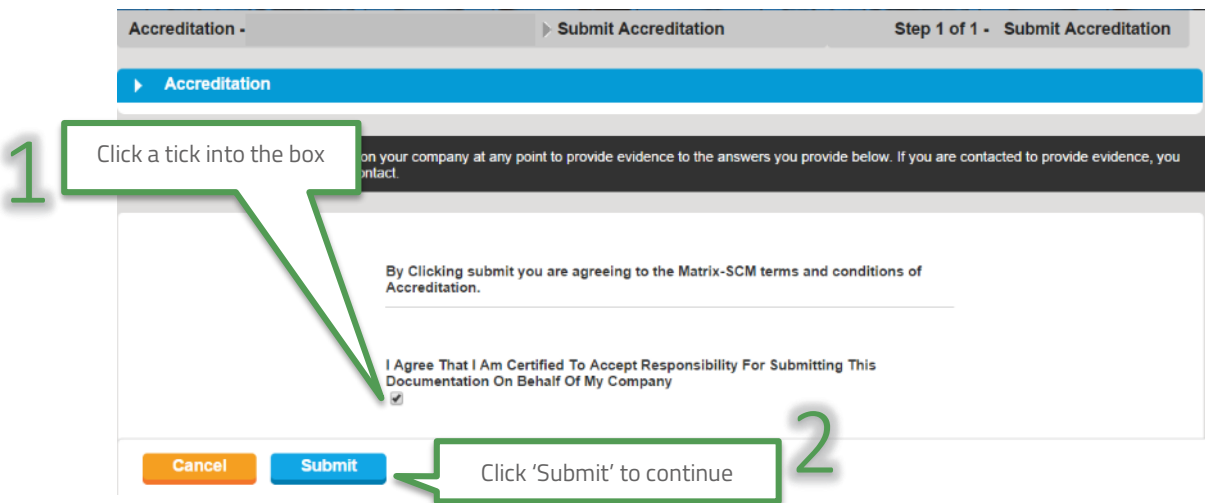
Cancel Submit

Click 'Submit' to continue

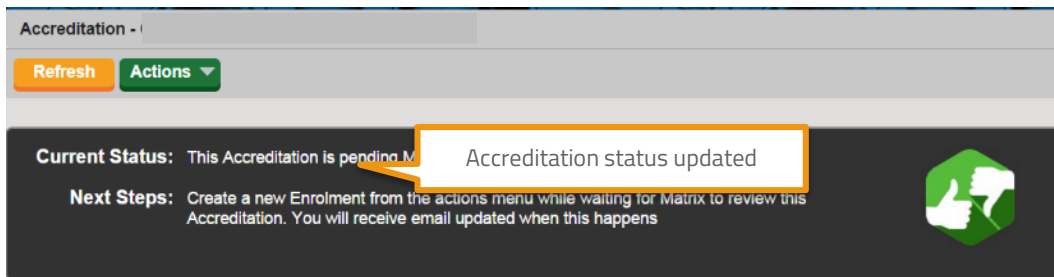
2

3

7. Confirm you agree to the terms and conditions.

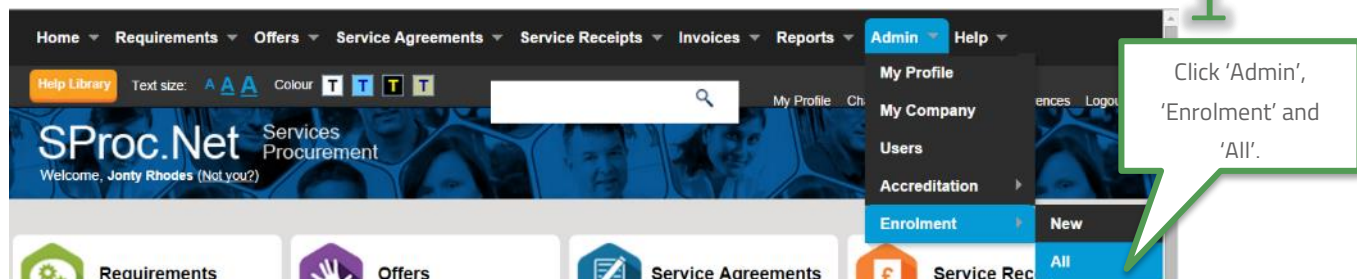


8. The Accreditation submission will have updated to show it has been re-submitted to *adam* for review:

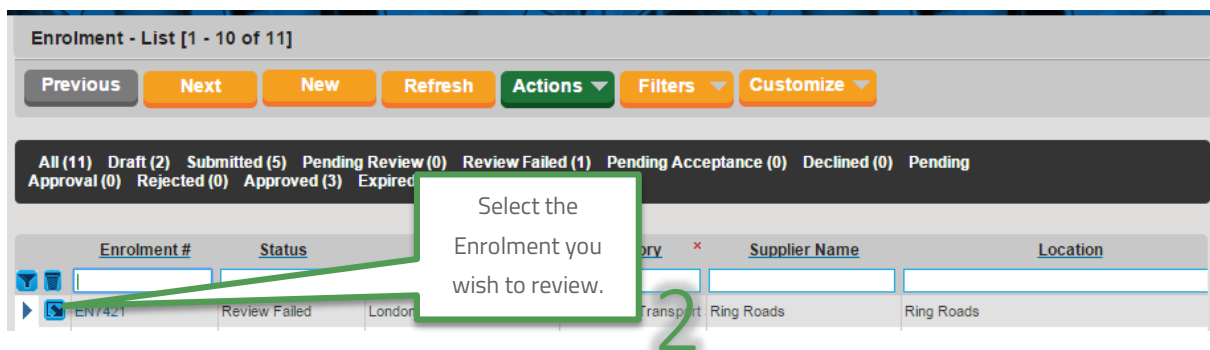


Resubmitting a Failed or Rejected Enrolment

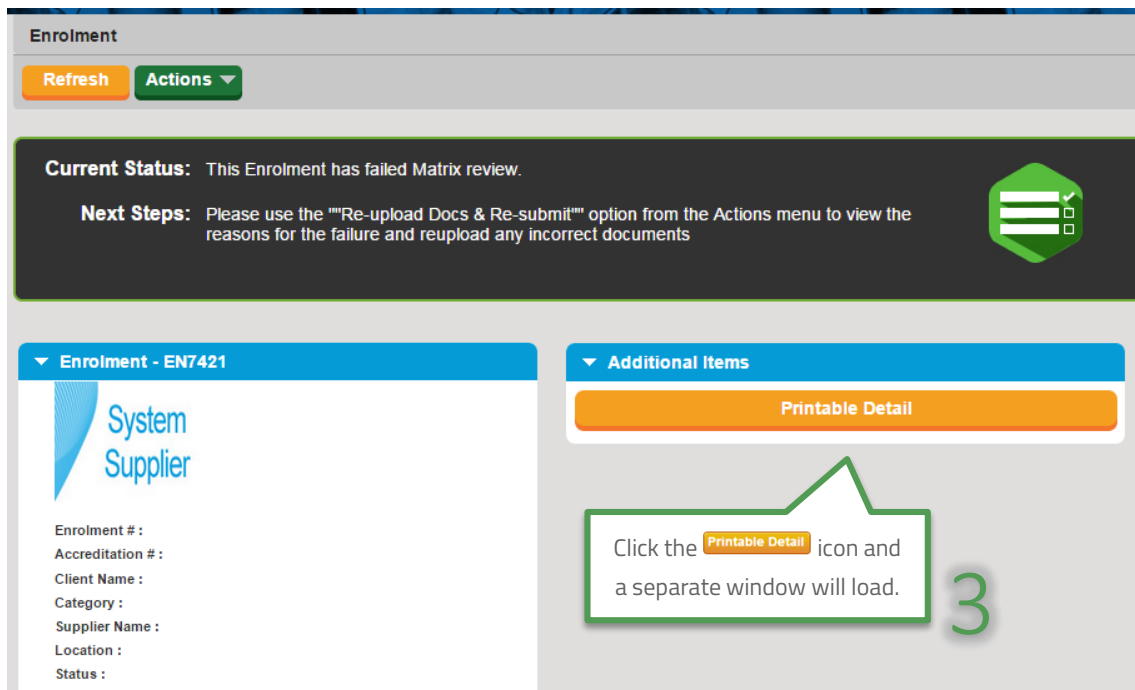
1. If your Enrolment is failed or rejected, from your homepage:



2. This will show you a list view of all of your Enrolments:



3. This will show you the Enrolment summary page:



4. This document will show you all the Enrolment information and the reason it was failed or rejected:

!fnVocab(Enrolment,enrolment,P) Detail Report

SProc.Net
Services Procurement

!fnVocab(Enrolment,enrolment,P)	
#: 7421	Status: Review Failed
Client: London Borough of	Category: Passenger Transport Services
Supplier: Ring Roads	Location: Ring Roads
Status: Review Failed	
Description:	Created by: Lucy Jones Created: 15/12/2014 17:19 External Ref. Expiry Date: Expired: False Approve by Date: Date Approved: Date Submitted: 16/12/2014 09:26

!fnVocab(Questions and Answers,questions_and_answers,P)		
Question Type	Question	Answer
Licensing	Has your organisation ever had its Operating licence or PCO licence suspended, revoked or refused?	No
Professional Standing	Please provide full details and explain what remedial actions have been taken.	

At the bottom of the report there will be a field, this will contain the rejection comments as detailed by the client:

Documents - Current											
Document Type	Filename	Last Review Date	Issue Date	Issue Number	Expiry Date	Review Passed	Comments	Reason	Is Current	Is Original	Required
Cash Flow Forecast	TEST DOCUMENT.docx	16/09/2014 11:09				True			True	True	True
Operators Licence	TEST DOCUMENT.docx	16/09/2014 11:09	01/08/2014 00:00		06/08/2022	True			True	True	True
Complaints policy	TEST DOCUMENT.docx	16/09/2014 11:09				False	please upload a in date doc	Incorrect Document	True	True	True
Audited accounts	TEST DOCUMENT.docx	16/09/2014 11:09				True					
Vehicle Requirements	TEST DOCUMENT.docx	16/09/2014 11:09				True					
Private Hire Vehicle (London) Licence		16/09/2014 11:09				True					

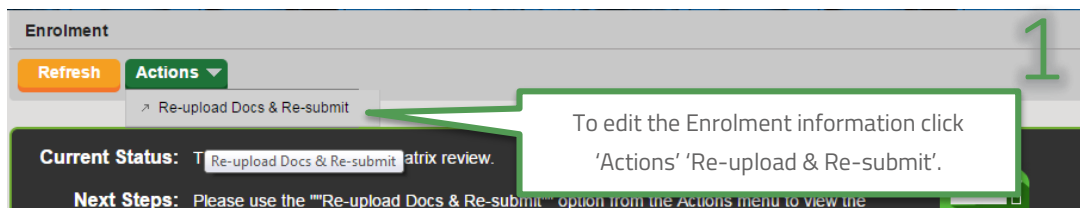
This !fnVocab(Enrolment,enrolment,P) contains no historical documents

Review the details of why the Enrolment was failed or rejected.

1

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

5. From the Enrolment summary page:



Update the required information:

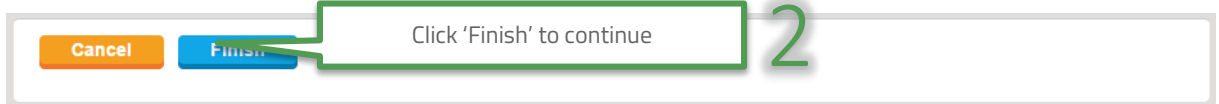
Re-upload Documents

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

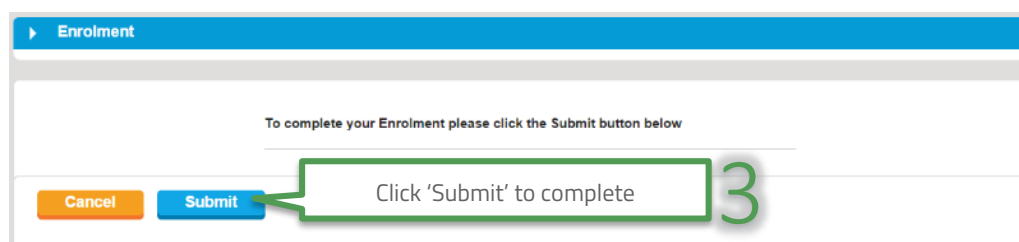
Document Type	Old File Name	New File Name	Issue Date	Issue Number	Expiry Date
Audited accounts	TEST DOCUMENT.docx	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Cash Flow Forecast	TEST DOCUMENT.docx	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Operators Licence	TEST DOCUMENT.docx	<input type="text"/>	01/08/2014	<input type="text"/>	06/08/2022
Vehicle Requirements	TEST DOCUMENT.docx	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Private Hire Vehicle (London) Licence		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Complaints policy	TEST DOCUMENT.docx	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

6. Click 'Finish' to save your update, you will be returned to the Enrolment summary page and the item information will have updated

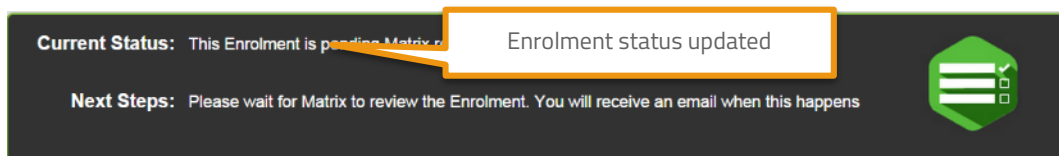
7. To submit:



8. Click 'Submit' to complete:



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



Adding Additional Locations

- Use this process to add further branches of your company to your SProc.Net system.
- Within SProc.Net you will need to separately Enrol each branch/location within your company.
- This process allows you to manage multiple branches/locations via one SProc.Net account. It permits you to specify branch specific criteria, for example, different branch/locations can supply different Service Categories into a client.

1. Login to your SProc.Net system
2. From your homepage expand the 'Admin' tab on your toolbar:

The screenshot shows the SProc.Net homepage. The top navigation bar includes 'Home', 'Requirements', 'Offers', 'Service Agreements', 'Service Receipts', 'Invoices', 'Reports', and 'Admin'. The 'Admin' dropdown menu is expanded, showing 'My Profile', 'My Company', 'Users', 'Accreditation', and 'Enrolment'. A green callout box with a speech bubble points to the 'Admin' menu, containing the text: 'Hover over 'Admin' and then 'My Company''. A large green number '1' is positioned to the right of the callout. Below the navigation bar, the main content area features four panels: 'Requirements', 'Offers', 'Service Agreements', and 'Service Receipts', each with a list of sub-items and counts.

- You will be directed to a page detailing all of your company information:

- To add a location, select the 'Actions' icon:

5. Input all of the information about your additional location:

Please enter the address and contact details of you company's branch/location.

Location Display Name: *

Address Line 1: *

Address Line 2:

City: *

County: *

Address Post Code: * (Must be exactly 7 characters e.g. AA111AA or AA1 1AA)

Country: * United Kingdom

Address Phone:

Tax No:

Url:

Contact: *

External:

Company Vocab Override :

Cancel Next

1 Add all of the details of the new location.

2 Click 'Next' to complete.

6. You will be returned to your company information page:

Company - Quality Care

Refresh Actions

Quality Care

Milton Keynes
MK9 1EA
United Kingdom

System Supplier

Status: Active
Updated: 28/10/2015 11:24

Phone #: 01234568552
VAT #: 125554222
Url:

Admin

- > Accreditations (4)
- > Activity (3)
- > Bank Details (1)
- > Community Reviews
- > Enrolments (5)
- > Locations (2)
- > Service Categories (27)
- > Supply Categories (3)
- > Supply Clients (1)
- > Users (1)
- > Accreditation Required Documents/Questions
- > Enrolments Required Documents/Questions

The new location will be listed under the 'Locations' icon.

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:

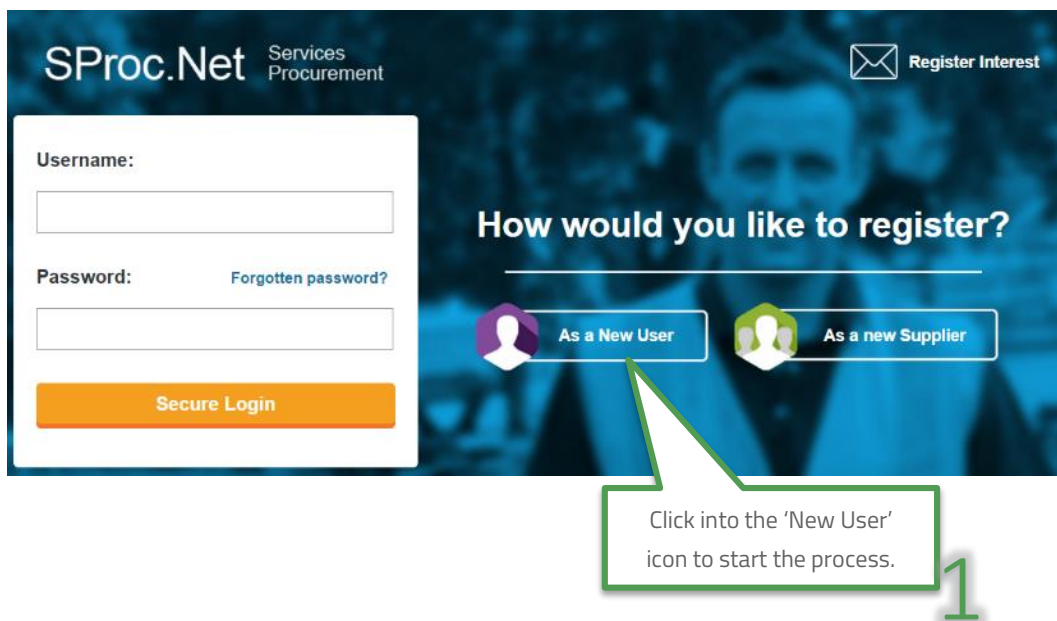
- a) New User can request to join (user will input their own information and Administrator will approve)
- b) Admin user can add user onto SProc.Net

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:



2. This will direct you to the 'New User' details page:

The screenshot shows the 'New User Registration: New User Details' page on SProc.Net. The page includes a header with 'SProc.Net Services Procurement', text size controls, and navigation buttons for 'Home', 'Register Interest', and 'New Supplier Registration'. The main content area is titled 'New User Registration: New User Details' and contains instructions for registration. The form is divided into three sections: '1 Business Details', '2 About You', and '3 Additional Information'. A 'Company' selection window is open on the right, showing a list of companies. Five numbered callouts provide instructions: 1. 'Use the [dropdown icon] icon to select a role from the drop-down list.' (points to the 'User Role' dropdown set to 'Supplier'); 2. 'Use the [company icon] icon to select a company from the list window.' (points to the company selection icon in the 'Company' field); 3. 'Input all the user details.' (points to the 'First Name', 'Last Name', 'Email Address', 'Phone #', and 'Location' fields); 4. 'Input further information for the approver to review.' (points to the 'Additional Information' text area); 5. 'Click 'Register' to complete.' (points to the 'Register' button at the bottom). The 'Company' window shows a search bar, 'Sort by' options, and a list of companies including HC-ONE LIMITED, MOUNDSLEY HALL LIMITED, MRS MALTI DIWAN, BUPA CARE HOMES (CFHCARE) LIMITED, GLENFIELD HOUSE NURSING HOME LTD, DR J M KUMAR, WAYSIDE CARE LIMITED, BUPA CARE HOMES (ANS) LIMITED, MR ROSHAN DASS, and VOYAGE 1 LIMITED.

3. 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:

The screenshot shows the SProc.Net homepage. The top navigation bar includes 'Home', 'Requirements', 'Offers', 'Service Agreements', 'Service Receipts', 'Invoices', 'Reports', 'Admin', and 'Help'. The 'Admin' menu is expanded, showing 'My Profile', 'My Company', 'Users', 'Accreditation', and 'Enrolment'. A green callout box with the number '1' points to the 'Users' option, with the text: 'Click 'Admin' and then 'Users'.'

2. This will take you to a list view of all your users:

The screenshot shows the 'Users (Filtered on Parent)' list view. At the top, there are buttons for 'New', 'Refresh', 'Actions', 'Filters', and 'Customize'. Below these are search filters for 'Name', 'Company', and 'User ID'. The main table lists users under two role categories: 'SupplierAdministrators (1)' and 'SupplierUsers (1)'. A green callout box with the number '2' points to the eye icon next to 'Lucy Jones', with the text: 'Clicking the [eye icon] will take you to that user's information page.'

	Name	Company	User ID
Role Name - SupplierAdministrators (1)			
<input type="checkbox"/>	Lucy Jones	Ring Roads	
Role Name - SupplierUsers (1)			
<input type="checkbox"/>	William Troy	Ring Roads	williamtroy

3. Click into the new user to view their details:

The screenshot shows the user details page for 'William Troy (Ring Roads)'. It includes a 'Refresh' button and an 'Actions' dropdown. A green callout box with the number '3' points to the user's name link, with the text: 'Click the user's name link.'

William Troy (Ring Roads)		ACT	
William Troy	Email:	> Standard Notifications (144) > Community Reviews	
Ring Roads	Telephone:		
Status: Active	Last Login: 04/11/2014 15:40		
Role: Supplier			
Updated: 07/10/2014 09:07			
		Notes (0) New	

Review their details and select their account settings:

The screenshot shows a user management interface with the following sections:

- Header:** Save, Refresh, Actions
- User Details:** Company: Ring Roads, Name: William Troy, #Logins: 29, Last Login: 04/11/2014 15:40, User Agent: Chrome - 38.0.2125.111 (Windows), Failed Logins: 0, Role Type: Supplier, Status: Active, Created By: [blank], Date Created: 21/08/2014 10:17, Updated By: Christine Maclean, Date Updated: 07/10/2014 09:07
- Editable Fields:**
 - User ID: williamtroy (Must not contain blank spaces)
 - First Name: * William
 - Middle Name: [blank]
 - Last Name: * Troy
 - Job Title: [blank]
 - Email Address: * [blank]
 - Phone #: [blank]
 - Community Review Score: [blank]
 - Location: * Brum Way Care (with location selection icons)
 - Level Name: [blank] (with level selection icons)
- Registration Notes:** A rich text editor with a toolbar and a 'Preview' button.
- Role Settings:**
 - Role Name: SupplierUsers (dropdown menu)
 - Page Start: [blank] (dropdown menu)
 - Notifications: Yes (dropdown menu)
 - Notifications Type: Email (dropdown menu)
 - Locked:

Callout 1: Review the information they have submitted.

Callout 2: Use the [location icon] icon to select a user location from the list window.

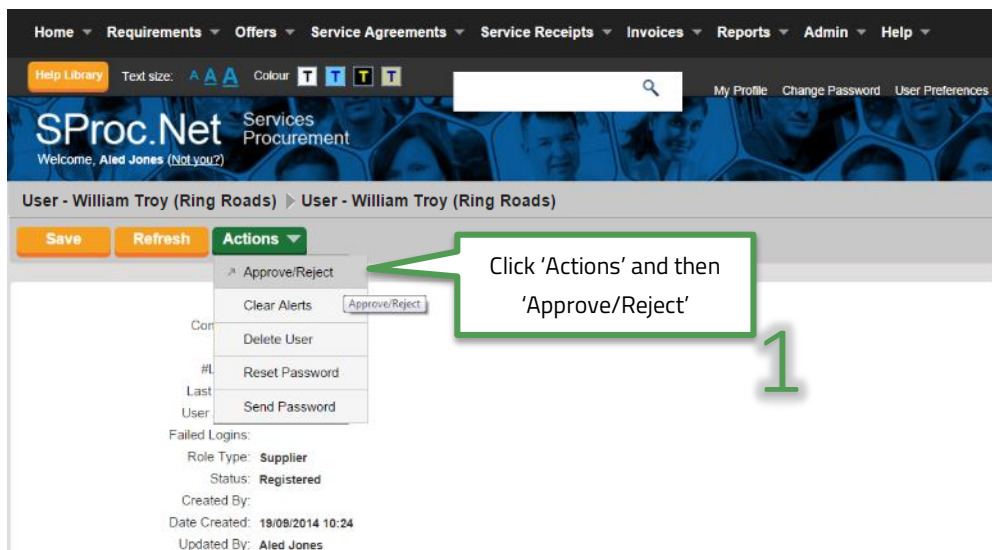
Callout 3: Use the [dropdown icon] icon to select the user's access level.

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

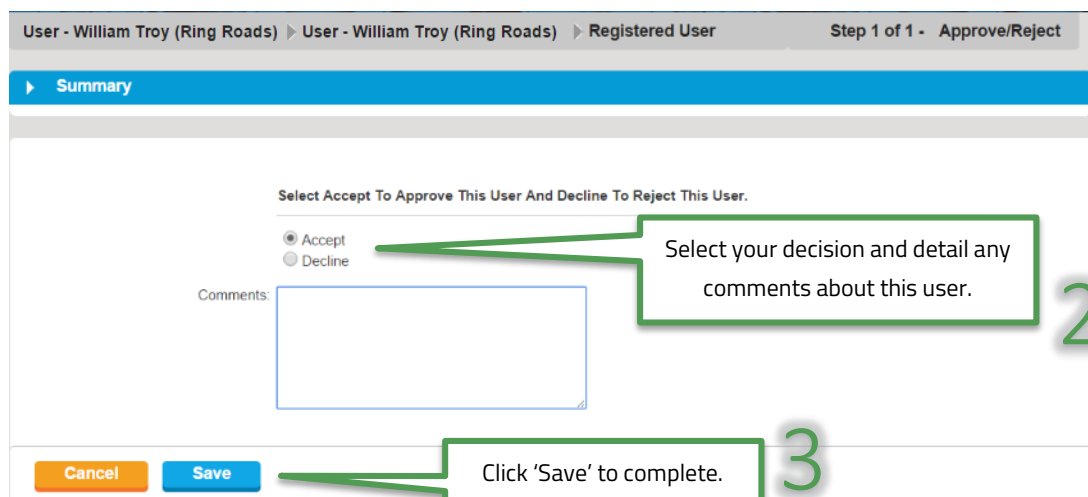
Role Name	Access	Example
Supplier Administrators	Access to view & approve all process steps	Supply branch manager
Supplier Executives	Access to view & approve all process steps within a defined service area	Head of service with supply branch
Supplier Finance	Access to view supplier bills and invoices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

Table 1.0

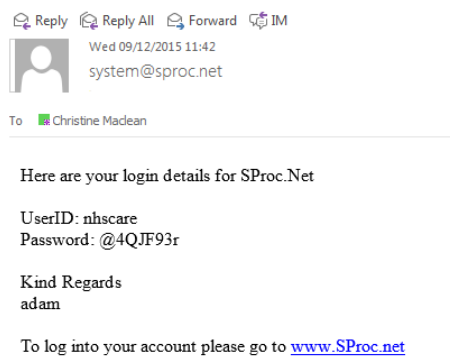
4. Once complete you will need to approve the user:



5. Accept or decline the new user application:



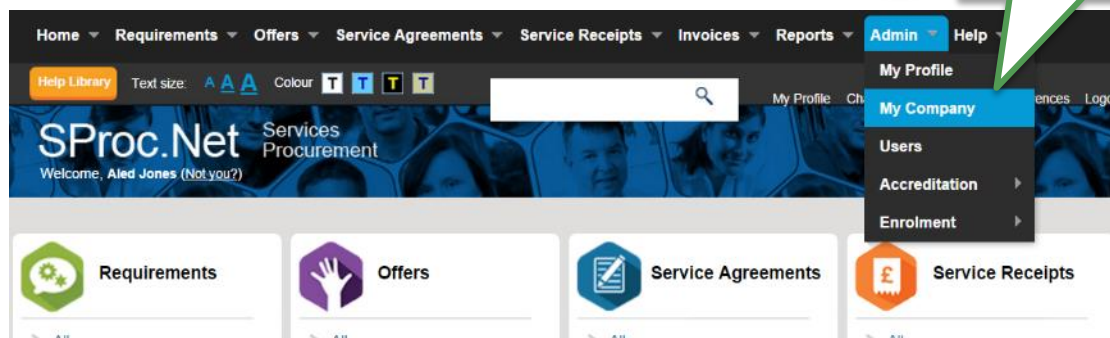
6. If approved, this process will trigger an email to this new user informing them of their new username and password:



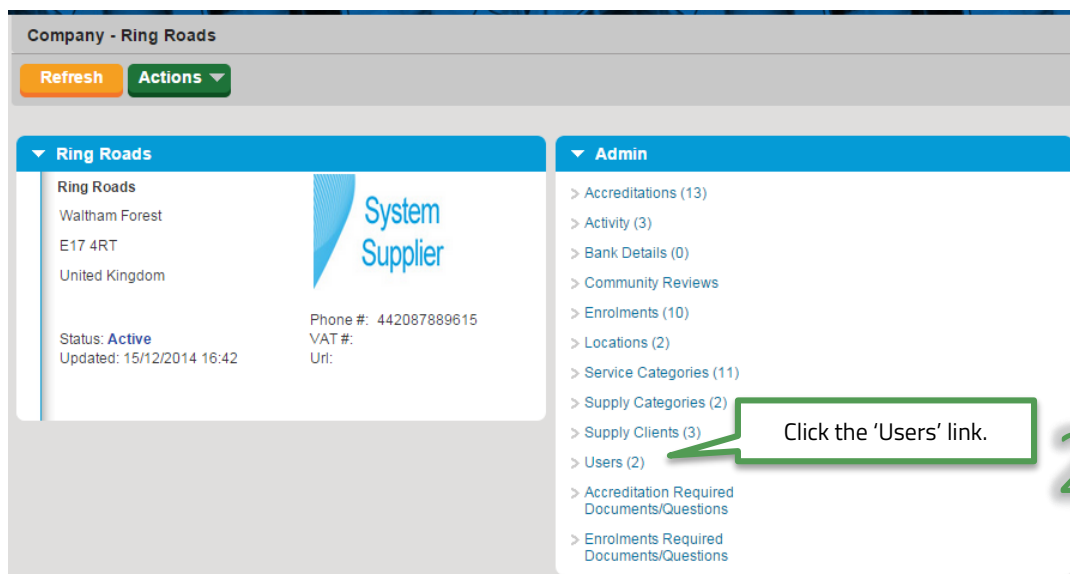
New User Creation – By System Administrator

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

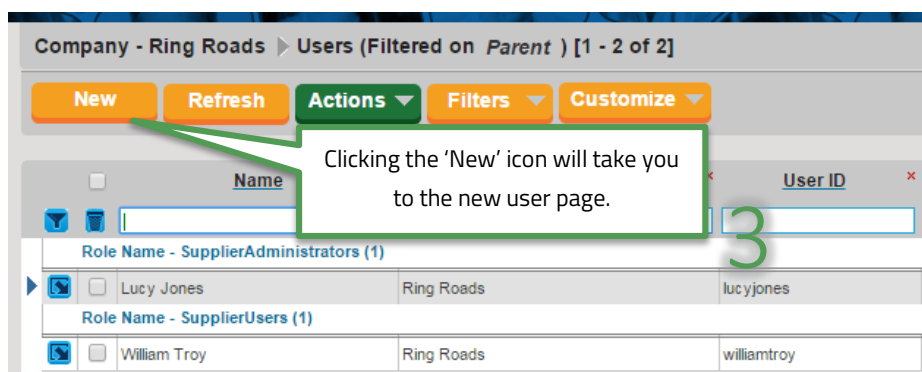
1. Login to your SProc.Net system
2. From your homepage, expand the 'Admin' tab on your toolbar:



3. Select the 'Users' link under the Admin section of this page:



4. Select the 'New' icon:



5. Complete the User's details and role:

The screenshot shows the 'New User' form in SProc.Net. The form is titled 'Step 1 of 1 - Basic Details' and includes the following fields and options:

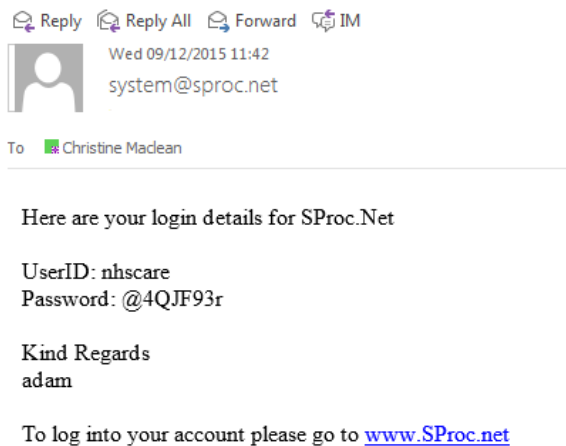
- 1 Basic Details:**
 - User Role: Supplier (dropdown)
 - First Name: *
 - Middle Name: *
 - Last Name: *
 - Phone #:
 - Location: * (with location selection icon)
 - Email Address: *
 - Send Password
- 2 User role:**
 - Please choose a user role for your new user.
 - User Role: * (dropdown)

Callouts:

- 1: Input the user's details.
- 2: Use the location icon to select a user location from the list window.
- 3: Use the dropdown icon to select the user's access level.
- 4: Click 'Save' to complete.

See Table 1.0 on page 11 for User Role explanations

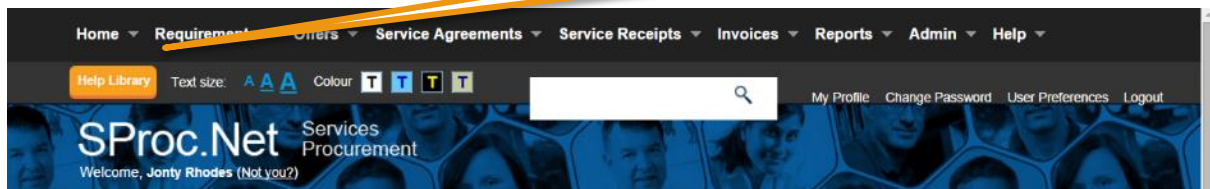
6. This process will trigger an email to this new user informing them of their new username and password:



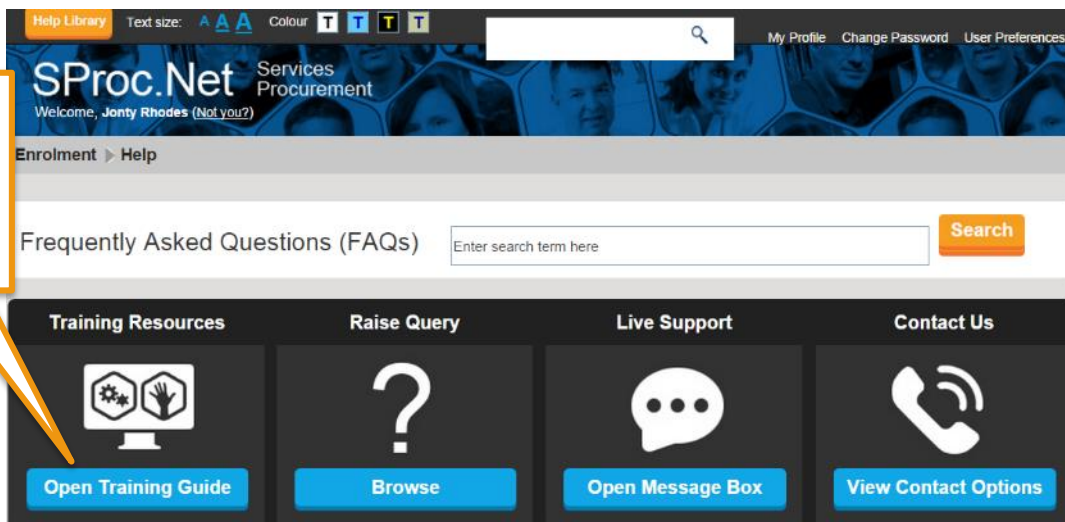
Need More Support?

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

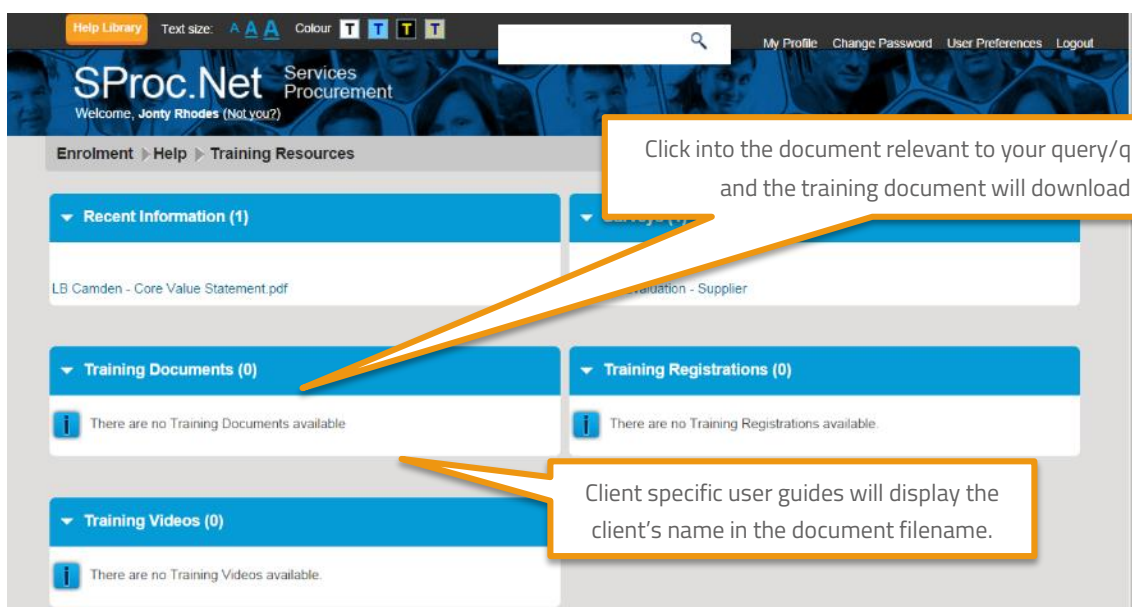
Click into the 'Help Library' icon on your homepage



Click here to view all training resources available



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



Click into the document relevant to your query/question and the training document will download

Client specific user guides will display the client's name in the document filename.