



# London Borough of Bromley Registration, Accreditation and Enrolment Matrix SPS



S2 - SProc.Net – Education & Support Services – v2.3

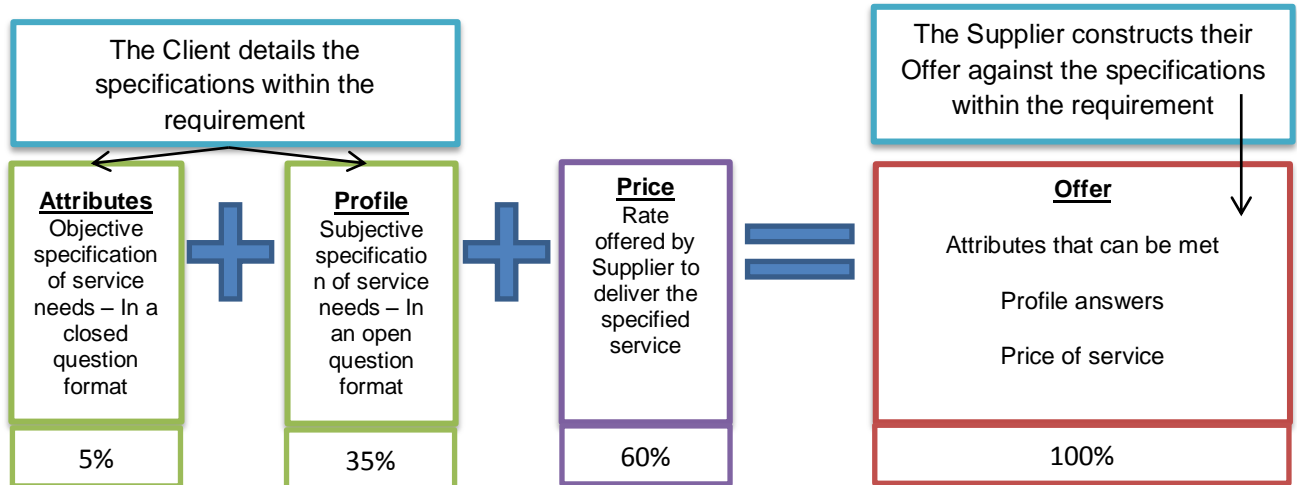
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## Overview

The SProc.Net system is a sophisticated web based technology platform used by Clients and Suppliers to aid in the efficient and fair procurement of services through a 14-step process.

Requirements (Client service needs) and Offers (Supplier service bids) within the system are broken down into three separate metrics; Attributes, Profile and Price.



The Client inputs for what percentage these three metrics will account in the complete Offer score, which defines how the SProc.Net system will rank those Offers into a shortlist.

During the Requirement creation and distribution period a Client also sets out timescales that outline the subsequent periods where Offers can be reviewed and revised.



### Note:

- ➔ If the service start date is within 24 hours of Requirement distribution the above timescales will not apply. Supplier Offers will be evaluated when submitted and a Service Agreement (contract) created straightaway when a suitable Supplier is identified.
- ➔ Offers submitted are to deliver a service, not a specific person/worker.

Once all the review periods are complete the Client is presented with a final shortlist of Offers based on the Offer scores in relation to the three metrics (Attributes, Profile and Price).

They will then progress the top ranked Offer through to the Service Agreement (contract) step and this finalises the procurement process, after which the service delivery can commence.

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

- ➔ Complete the Registration process
- ➔ Add additional Supplier locations to your system
- ➔ Create additional users within the system
- ➔ Create an Accreditation
- ➔ Create an Enrolment

# Glossary

Terminology	Description
New Supplier	A Supplier who has never used the SProc.Net system before
Supply Category	The Supply Category is the over-arching service sector. Type of service, e.g. Training Services, Care Services, Education and Support Services, etc.
Service Category	The Supply Category is broken down into smaller Service Categories. For example, 'Education and Support' is broken down into the Service Categories 'School Support Consultants' 'Supply Teachers for Behaviour Services', 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.

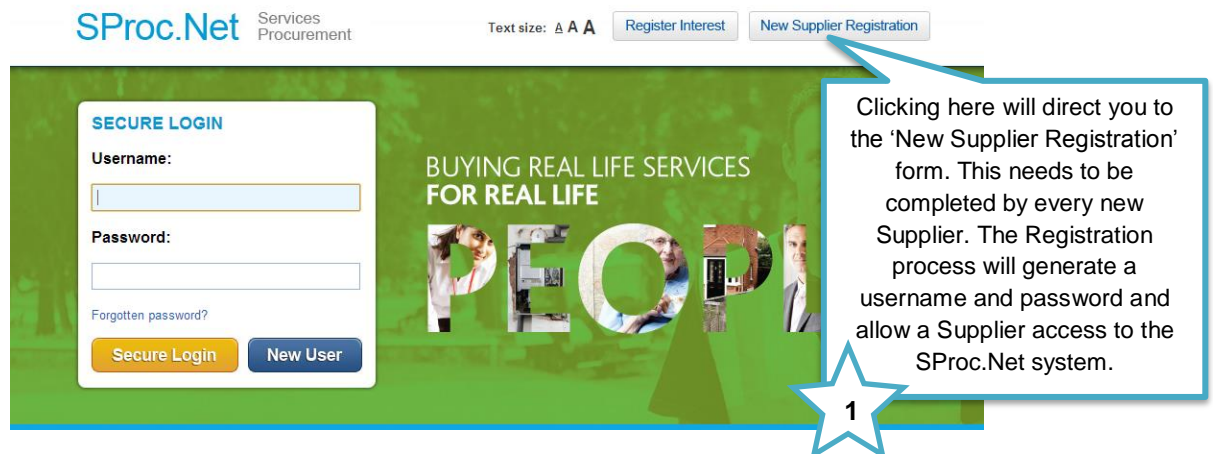


If you click on the question mark, a small window containing further information about what is required during a specific section will appear.

# Registration

**Note:** You only need to complete Registration if you are a new Supplier to SProc.Net. If you supply another Client via the system, you need to start with Accreditation. See page 17.

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



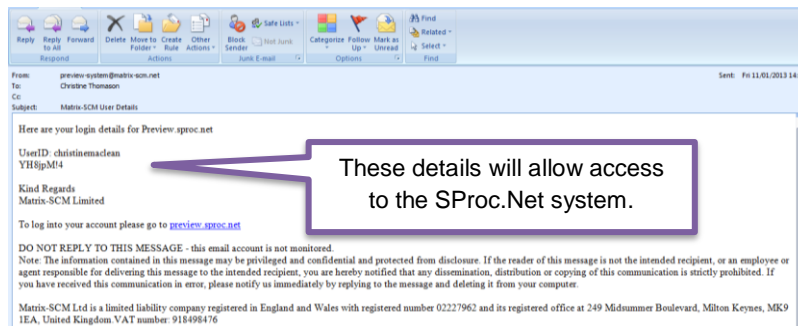
3. The registration form will ask for details about your company:

The screenshot shows the 'New User' registration form on the SProc.Net website. At the top is the SProc.Net logo and 'Services Procurement'. Navigation buttons include 'Home', 'New User', 'Register Interest', and 'New Supplier Registration'. The form has a header with 'Company Details' and 'New User'. Below the header is a blue box with instructions: 'Please insert as much information as you can through the following steps. Your company name will be checked by our database against any existing companies that have the same name. You will be informed if a duplicate is discovered.' Below this is a note: 'It is mandatory fill in the fields with the \* next to them'. The form is divided into two sections: '1 Company Details' and '2 Address / Contact Details'. The 'Company Details' section includes fields for 'Company Name: \*', 'Registered Name:', 'Website:', 'Logo File:', 'VAT Registered? \*' (with a 'Yes' dropdown), 'Business Tax/VAT #: \*', 'Legal Entity Type: \*', and 'How many employees does your organisation have? :'. A callout box with a star containing the number '2' points to the 'Website:' field. The text in the callout box reads: 'Enter all your details as asked. These details will create your new SProc.Net account.'

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

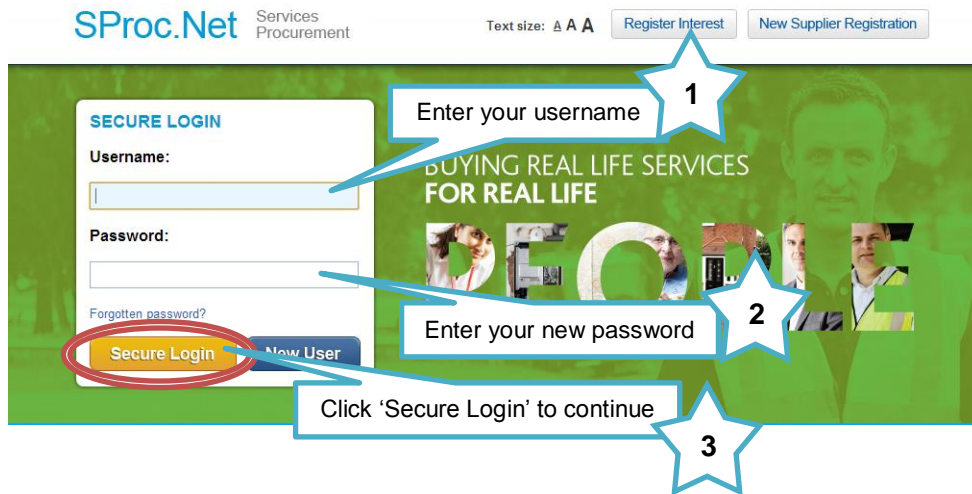
- This page is about creating a user profile. This first user will, by default, become the Supplier Administrator for your SProc.Net system. They will have full access to tailor the system and can create further 'users' within the SProc.Net system at a later stage. This user can also create other administrators who will have full access (details on page 10):

- 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:

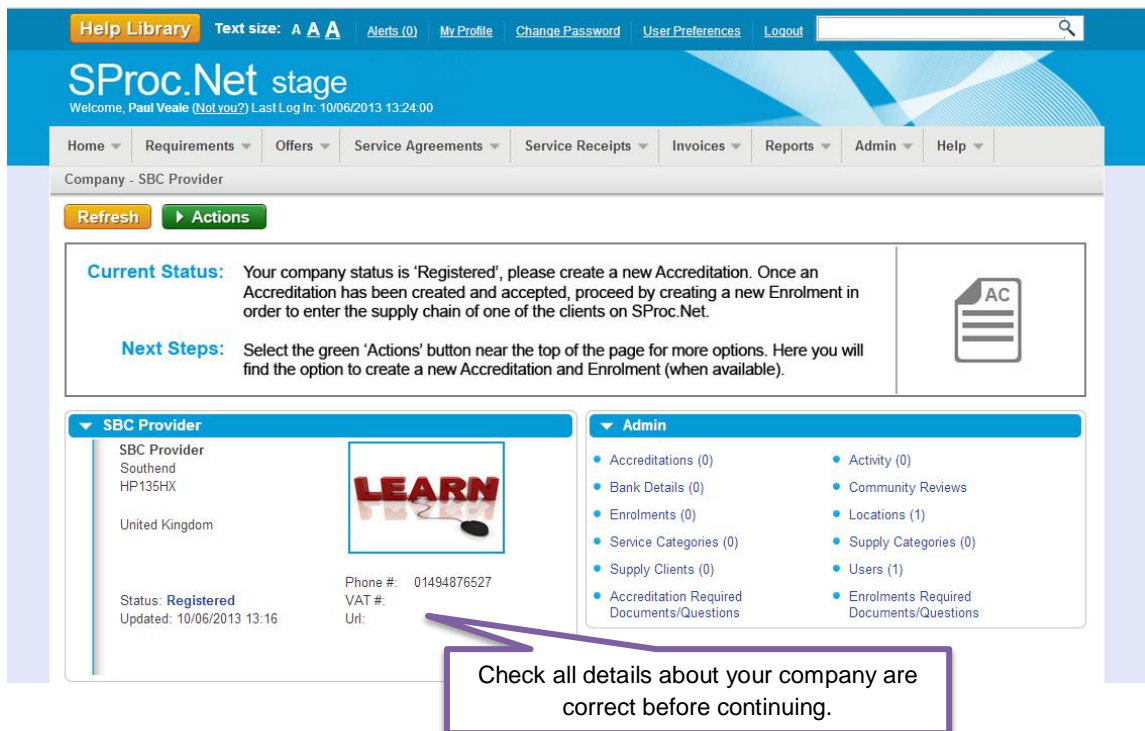


- From the SProc.Net login page, login using the username and password provided. There will be an automatic prompt to change your password:

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



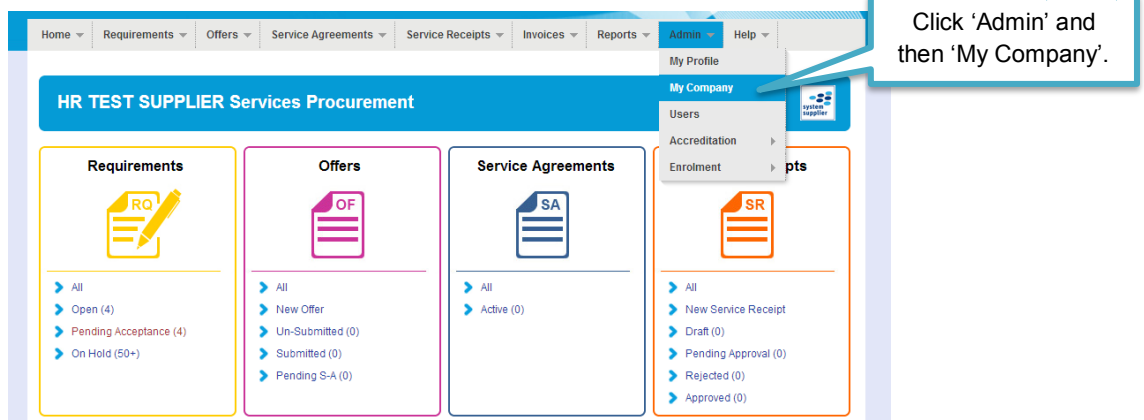
11. You will be directed to your 'My Company' homepage



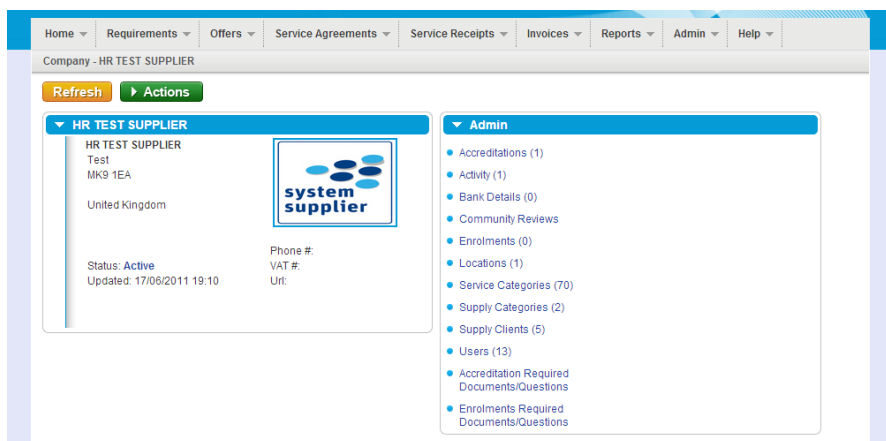
# Adding Additional Locations

- ➔ 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 locations via one SProc.Net account then permits you to specify branch specific criteria. For example, different branch/locations can supply different Service Categories into a Client.

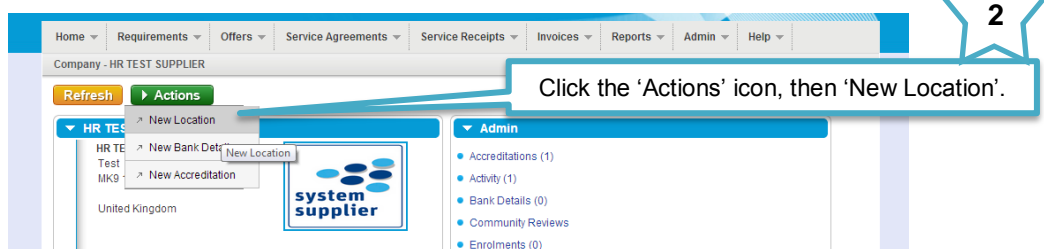
- 1) Login to your SProc.Net system
- 2) From your homepage expand the 'Admin' tab on your toolbar:



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



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





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

Company

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

Location Display Name: \*

Address Line 1: \*

Address Line 2:

City: \*

Country: \*



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

Country: \*

Address Phone:

Tax No:

Url:

Contact: \*   

External:

Cancel

Add all the new location details. 1

Click 'Next' to complete. 2

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


Home ▾ Requirements ▾ Offers ▾ Service Agreements ▾ Service Receipts ▾ Invoices ▾ Reports ▾ Admin ▾ Help ▾

Company - HR TEST SUPPLIER

Refresh

HR TEST SUPPLIER

HR TEST SUPPLIER  
Test  
MK9 1EA  
United Kingdom



Phone #:  
VAT #:  
Uri:

Status: Active  
Updated: 17/06/2011 19:10

Admin

- Accreditations (1)
- Activity (1)
- Bank Details (0)
- Community Reviews
- Enrolments (0)
- **Locations (1)**
- Service Categories (70)
- Supply Categories (2)
- Supply Clients (5)
- Users (13)
- 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 and/or Administrators who can access your system and complete steps within the process

User = Access to complete designated steps within the process

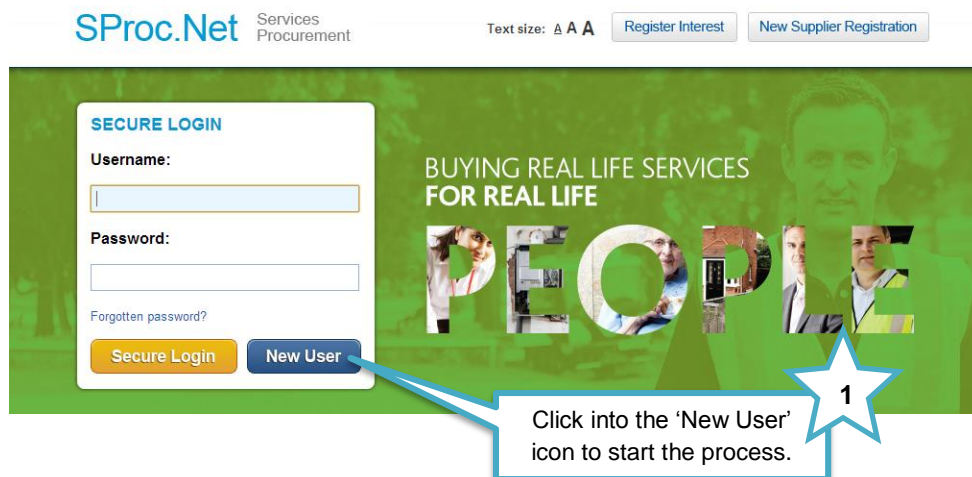
Administrator = As above, with authorisation to approve and edit user actions within the system

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

- ➔ Created by the user themselves then approved by the Administrator, or
- ➔ Created by you as the Administrator (see next section)

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. It is divided into three main sections: 'Business Details', 'About You', and 'Additional Information'. Callout 1 points to the 'User Role' dropdown menu, which is currently set to 'Supplier'. Callout 2 points to a search icon in the company selection area. Callout 3 points to a right-pointing arrow icon in the same area. Callout 4 points to the 'About You' section, which includes fields for First Name, Last Name, Email Address, Phone #, and Location. Callout 5 points to a large text area for 'Additional Information'. Callout 6 points to the 'Register' button at the bottom of the form. In the background, a search window titled 'Find Company' is visible, showing a list of companies with columns for 'Company Name' and 'City'.

1 Use the icon to select a role from the drop-down list.

2 Use the icon to select a company from the list window.

3 Clicking the icon will populate the window behind.

4 Input all the user details.

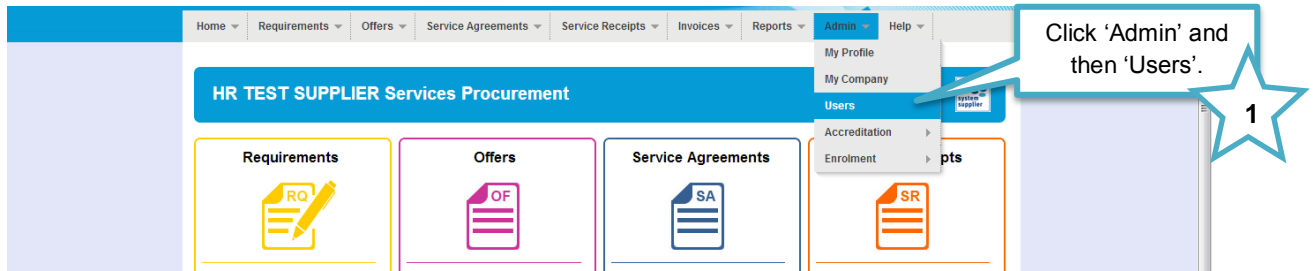
5 Input further information for the approver to review.

6 Click 'Register' to complete.

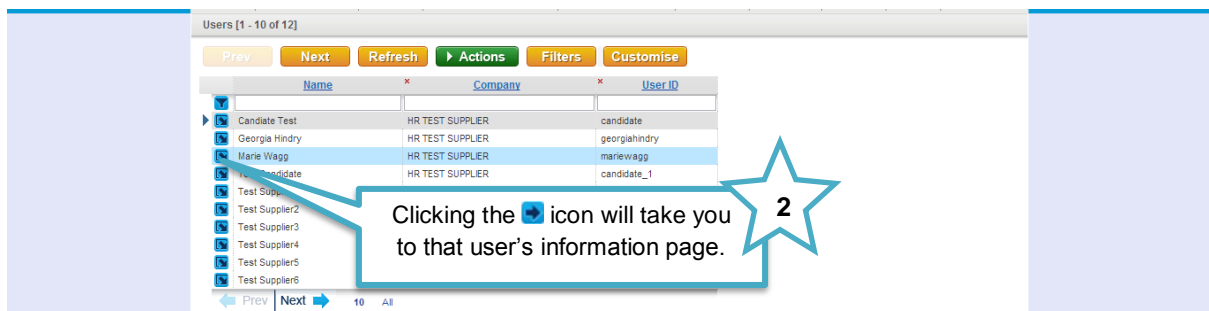
3. Once this form has been completed by you, your Administrator(s) will receive an email notification informing them that there is a New User request on the system

## Approving a New User

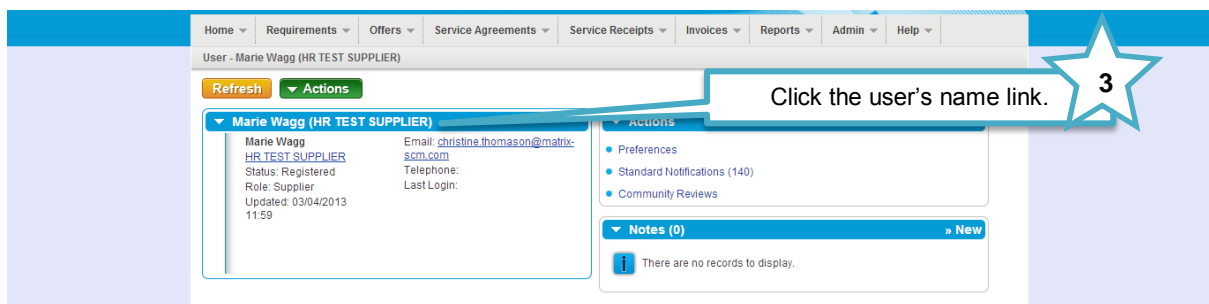
1. Administrator: Login to your account and from the homepage expand the 'Admin' tab on your toolbar:



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



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



4. Review their details and select their account settings:

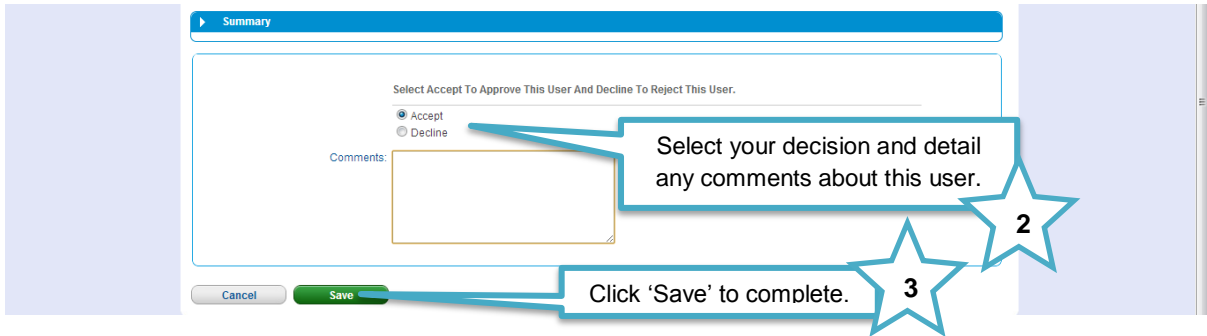
The screenshot shows a user profile page for 'Marie Wagg' (HR TEST SUPPLIER). The page includes a header with 'Save', 'Refresh', and 'Actions' buttons. The main content area displays user details such as Company, Name, #Logins, Last Login, User Agent, Failed Logins, Role Type, Status, Created By, Date Created, Updated By, and Date Updated. Below this is an 'Editable Fields' section with input boxes for User ID, First Name, Middle Name, Last Name, Job Title, Email Address, and Phone #. There is also a 'Community Review Score' field, a 'Location' dropdown with a list icon, and a 'Level Name' dropdown with a list icon. A 'Registration Notes' section contains a rich text editor with a toolbar and a text area. At the bottom, there are dropdown menus for 'Role Name', 'Page Start', 'Notifications', and 'Notifications Type', along with a 'Locked' checkbox. Three callouts are present: Callout 1 (star) points to the user details section with the text 'Review the information they have submitted.' Callout 2 (star) points to the location dropdown icon with the text 'Use the icon to select a user location from the list window.' Callout 3 (star) points to the role name dropdown icon with the text 'Use the icon to select the user's access level.'

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

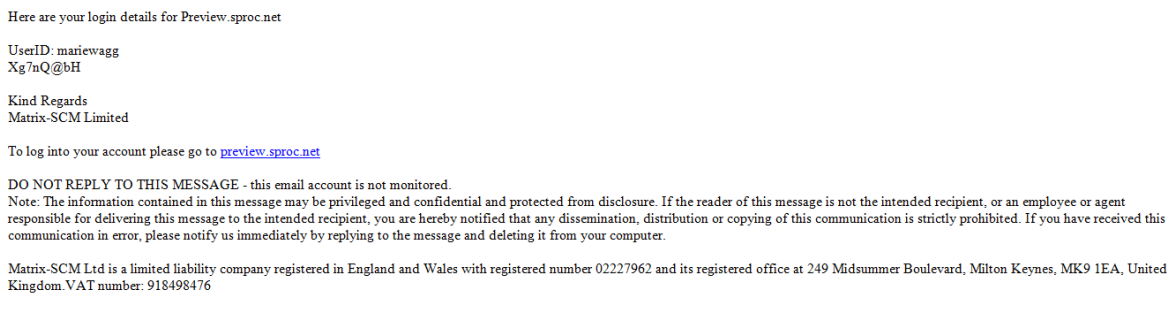
5. Once complete you will need to approve the user:



6. Accept or decline the new user application:



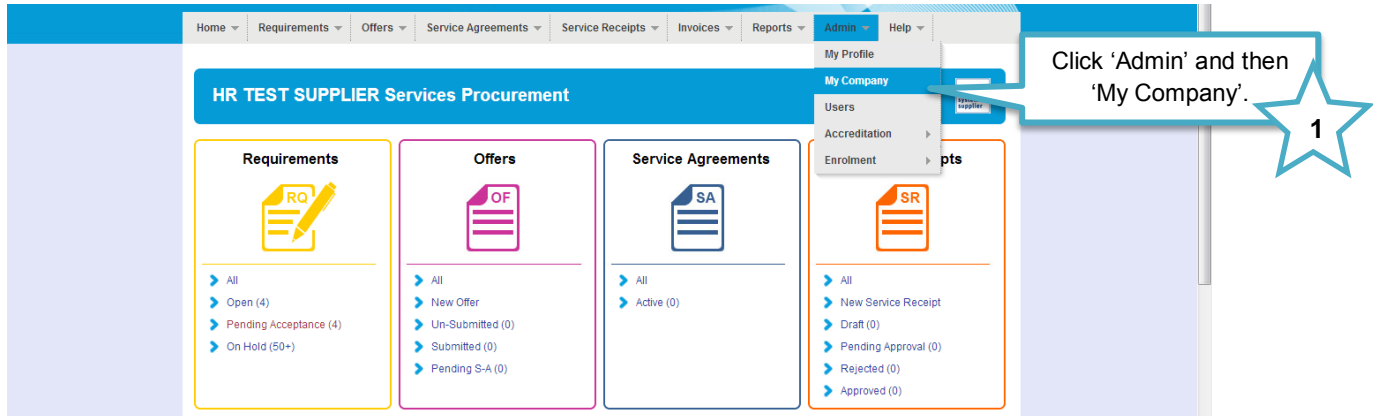
7. If approved, this process will trigger an email to this new user informing them of their new username and password:



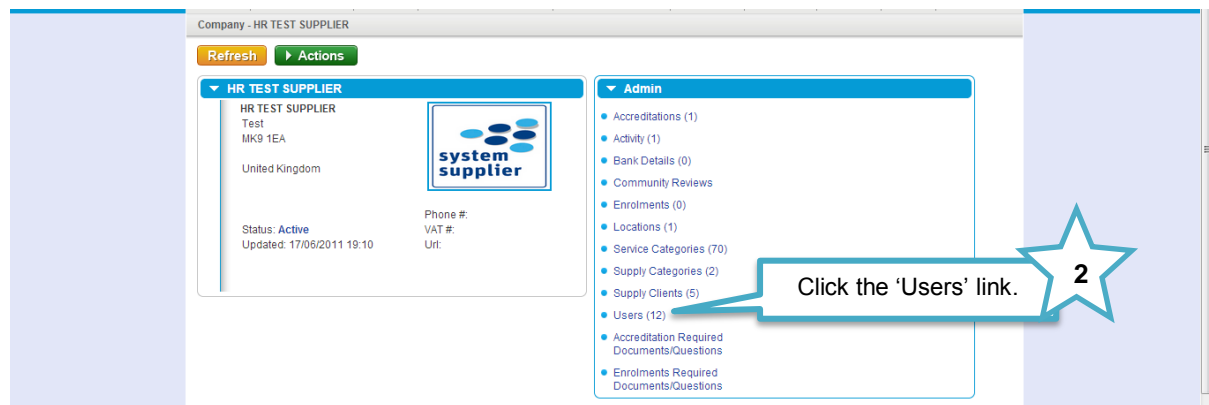
## New User Creation – By system administrator

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

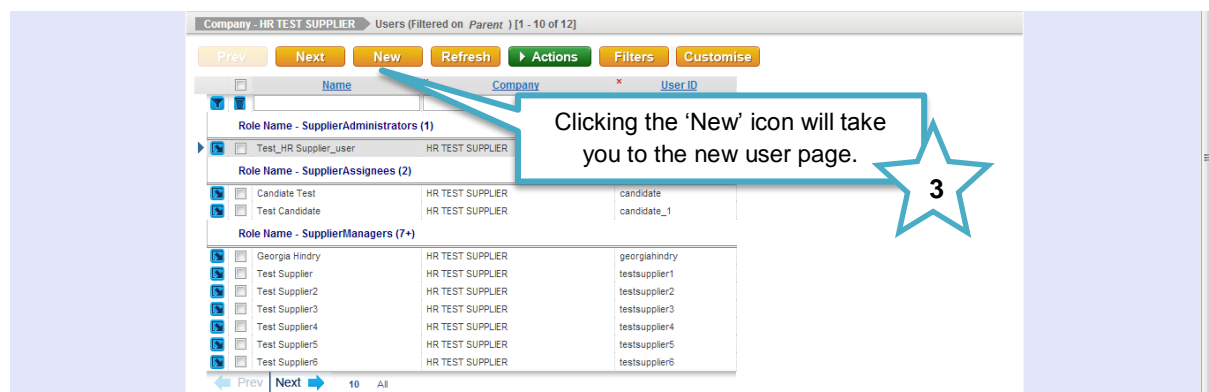
- 1) Login to your SProc.Net system
- 2) From your homepage expand the 'Admin' tab on your toolbar



- 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:

Company - HR TEST SUPPLIER > Users > New User Step 1 of 1 - Basic Details

Company

Enter the basic details of the new user and choose whether to send them their password via email.

Please enter your basic user information.

User Role: Supplier

First Name: \*

Middle Name: \*

Last Name: \*

Phone #:

Location: \*

Email Address: \*

Send Password

**User role**

Please choose a user role for your new user.

User Role: \*

Cancel Save

1 Input the user's details.

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

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

4 Click 'Save' to complete.

See table above for User Role explanations

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

Here are your login details for Preview.sproc.net

UserID: mariewagg  
Xg7nQ@bH

Kind Regards  
Matrix-SCM Limited

To log into your account please go to [preview.sproc.net](http://preview.sproc.net)

DO NOT REPLY TO THIS MESSAGE - this email account is not monitored.

Note: The information contained in this message may be privileged and confidential and protected from disclosure. If the reader of this message is not the intended recipient, or an employee or agent responsible for delivering this message to the intended recipient, you are hereby notified that any dissemination, distribution or copying of this communication is strictly prohibited. If you have received this communication in error, please notify us immediately by replying to the message and deleting it from your computer.

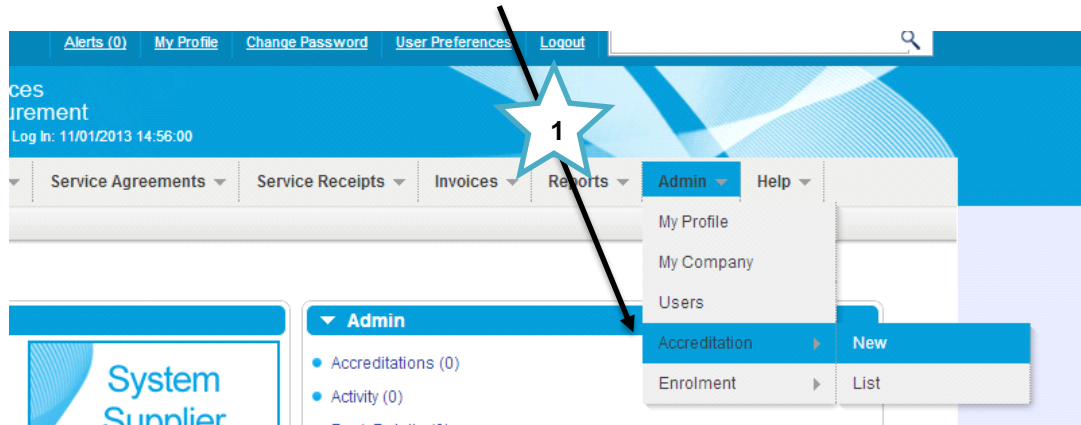
Matrix-SCM Ltd is a limited liability company registered in England and Wales with registered number 02227962 and its registered office at 249 Midsummer Boulevard, Milton Keynes, MK9 1EA, United Kingdom. VAT number: 918498476



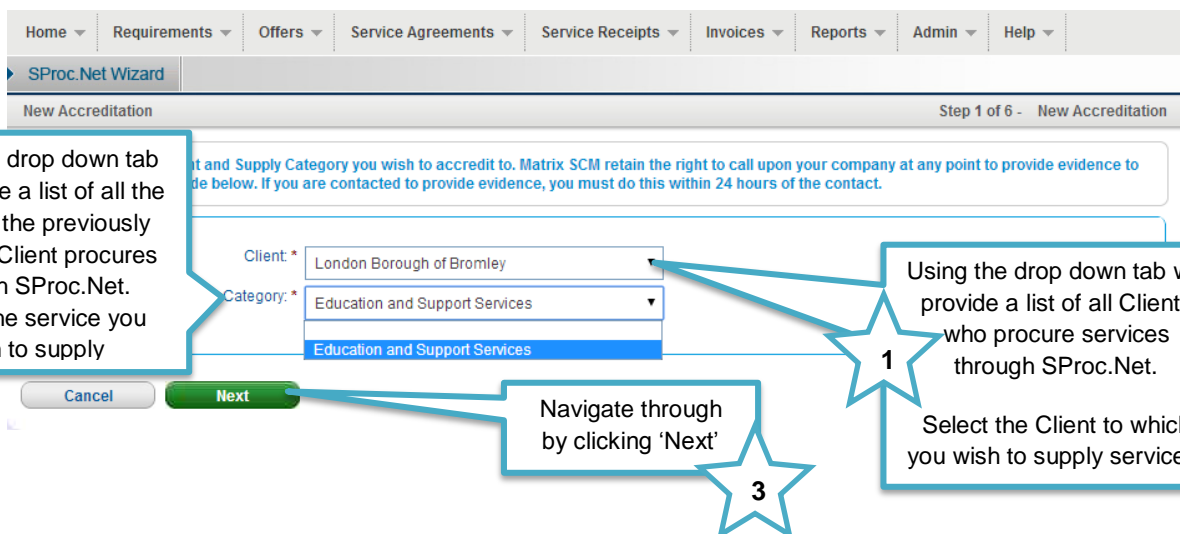
# Accreditation and Enrolment

All Suppliers need to go through Accreditation and Enrolment before they can supply any Client using SProc.Net. This involves submission of details and questions being answered that are set by the Client as a standards threshold / minimum criteria. Suppliers Accredite at a parent company level, and Enrol at a location level.

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:



## Notes:

**Supply Category** = Service Area – For example, Care Home Services, SEND Services, Transport Services, etc.

- ➔ 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.

3. The next page will require you to answer a selection of Yes/No questions, sign and upload a Matrix self-billing agreement and other documents:

**1** Use the drop down tab to select Yes/No. The Accreditation application will not be submitted to a Client if any of these answers are incorrect.

Question Type	Question Text
Insurances	Are you self-employed/a consultant, or do you have Employer's Liability Insurance cover for £5 million, you willing to put this in place if awarded a Service Agreement? If you have this insurance, please upload your Certificate of Insurance below.
Insurances	Do you have Public Liability Insurance cover for £10 million, or are you willing to put this in place if awarded a Service Agreement? If you have this insurance, please upload your Certificate of Insurance below.
Insurances	Do you have Professional Indemnity Insurance cover for £1 million, or are you willing to put this in place if awarded a Service Agreement? If you have this insurance, please upload your Certificate of Insurance below.
Safeguarding	Are you self-employed/a consultant, or do you run, or are you willing to run DBS checks on all your workers, including employees, volunteers and sub-contractors who may, in the course of their duties, come in to contact with children or young people?
Referees/References	Please confirm you will provide references on request.

**2** Using the upload icon, Suppliers are required to upload documentation. The success of the Accreditation application will depend on the documents uploaded and their contents.

Document Type	Template File Name
Self Bill Agreement	London Borough Of Bromley - Education and Support Services - Self-Billing Agreement - 2014-01-20.doc
Signature Document	London Borough Of Bromley - Education and Support Services - Signature Document - 2014-01-20.doc

**3** Using the calendar icons, add the document's issue and expiry dates. Type in the issue number.

**4** Click 'Save' to continue

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.

4. Confirm you have read and understood all terms and conditions

Accreditation - Additional Information    Submit Accreditation    Step 3 of 6 - Submit Accreditation

**Accreditation**

Accreditation #: AC9066  
Status: Draft  
Client Name: London Borough of  
Category: Services  
Supplier Name: Support Supplier 3

Matrix SCM 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.

By Clicking submit you are agreeing to the Matrix-SCM terms and conditions of Accreditation.

I Agree That I Am Certified To Accept Responsibility For Submitting This Documentation On Behalf Of My Company

1 Click a tick into the box

2 Click 'Submit' to continue



Cancel    Submit

5. Select the branch/location you wish to Accredite/Enrol to Bromley Council; each branch/location will need to go through this process individually

Supplier Location: \*


Cancel    Next

3 Click 'Next' to continue

Use the  icon to bring up the list of locations and select the correct location using the  icon.

1

Company:   
Location:   
Sort by:   Descending [Clear Search](#)

Find    Cancel     Locations [1 - 1 of 1]

Comp	Location	Address Line 1	City
<input checked="" type="checkbox"/> TaxDemo	TaxiDemo	100 Test Street	Milton Keynes

2

Prev    Next

Guidance on adding additional locations to your SProc.Net system is available on page 8

- Answer all question (yes/no and free-text) and upload against all required fields

Please note, as a security feature this page will ‘time out’ if the ‘Finish’ button is not clicked within 30 minutes and you risk losing your work. See page 22

**1** Use the drop down tab to select Yes/No to answer the Enrolment questions asked.

**2** Answer the free-text Enrolment questions

**3** Using the upload icon, Suppliers are required to upload the requested documentation. The success of the Enrolment will depend on the documents uploaded and their contents.

**4** Using the calendar icons, add the document's issue and expiry dates. Type in the issue number

“Optional Documents” are non-mandatory within an Enrolment submission but will be requested for review depending on the answers given to the Enrolment questions above. For example: “11. If you answered No to question 10, please confirm you will provide a copy of your organisation’s Health & Safety policy or details of the measures your organisation takes in order to adhere to health and safety at work practices and legislation; and upload this in the space provided.”

Enrolment continued:

- ➔ As a Supplier you must select which Service Categories you can supply.
- ➔ At Enrolment you will stipulate which categories of services you can supply into Bromley Council; subsequently you will only be able to make Offers against Requirements relevant to these selections.

The screenshot shows the 'Service Categories' selection interface. Callout 1 points to the 'Find more items' icon. Callout 2 points to the 'Done' button. Callout 3 points to the 'Finish' button.

1 Click 'Find more items' icon to bring up a list of Bromley's Service Categories

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

3 Click 'Finish' to continue

Service Category	Supply Category	Display
<input type="checkbox"/> School Support Consultants	Education & Support	<input checked="" type="checkbox"/>
<input type="checkbox"/> Supply Teachers for Behaviour Services	Education & Support	<input checked="" type="checkbox"/>
<input type="checkbox"/> Tutors for Looked After Children	Education & Support	<input checked="" type="checkbox"/>

## 7. To complete

The screenshot shows the 'Enrolment' completion screen. Callout 1 points to the 'Submit' button.

1 Click 'Submit'

To complete your Enrolment please click the Submit button below

# Saving an Enrolment to Draft

Please note, as a security feature the Enrolment page will ‘time out’ if the ‘Finish’ button is not clicked within 30 minutes and you risk losing your work.

To save information and leave the creation wizard without submitting the Enrolment you will need to save the item into ‘Draft’.

1. On the data entry page you will need to answer all yes/no questions, upload the mandatory documents, select your service categories and enter a character into each free-text box:

Question Type	Question	Answer
Professional Standing	Organisation is used throughout these questions. Organisation has been used as a catch all term referring to	
Declaration of Interest	1. Are or have any of the Directors /Partners/ Proprietors/Associates or Officers:	

Question Type	Question	Answer
Declaration of Interest	23. If you answered yes to question 1, please give details.	
Declaration of Interest	24. If you answered yes to question 2, please provide the following details: full name and address of the group,	

All fields **MUST** have information in them to save the item to ‘Draft’. The answers/text can be edited before submission.



2. At the bottom of the screen click ‘Finish’
3. On the subsequent screen click ‘Cancel’

Enrolment

To complete your Enrolment please click the Submit button below

Cancel
Submit



Click ‘Cancel’ to save to ‘Draft’

If you click ‘Submit’ the Enrolment will be submitted for approval

4. Clicking ‘Cancel’ will take you to the Enrolment summary page and this item will be saved under the ‘Draft’ status.

Help Library | Text size: A A A | Alerts (0) | My Profile | Change Password | User Preferences | Logout

**SProc.Net** Services Procurement  
Welcome, Fred Glennly (Not you?) Last Log In: 04/03/2014 12:01:00

Home | Requirements | Offers | Service Agreements

Enrolment

Refresh | Actions

**Current Status:** The Enrolment is still in draft status and will need to be completed and submitted to continue.

**Next Steps:** Ensure all items in the submission progress below are completed correctly and then select ‘Submit’ from the Actions menu to submit the Enrolment for approval

**Draft Progress (3)**

Have all of the required documents been uploaded?	<div style="border: 1px solid #0070c0; padding: 5px;">Take note of the Enrolment identification number to locate the item when re-entering the system.</div>	✓
Have all questions been answered correctly?		✓
Have service categories been added?		✓

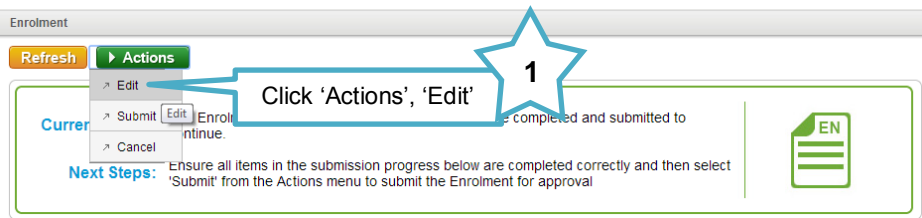
**Enrolment - EN6053**

Use the unique identification number of the item in the search field to find the item within your system

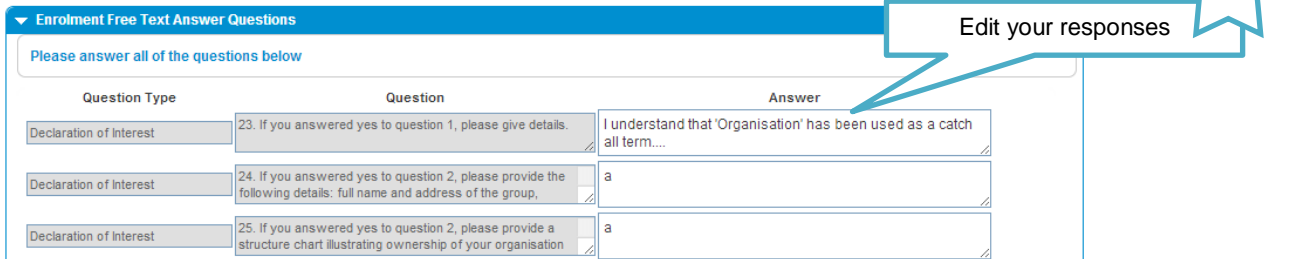
Item in ‘Draft’

Take note of the Enrolment identification number to locate the item when re-entering the system.

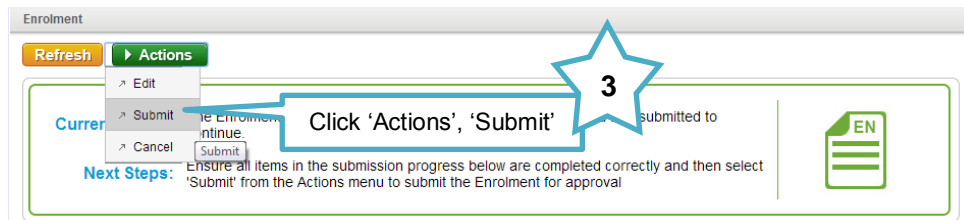
- From the Enrolment summary page, to edit the information click into the 'Actions' icon



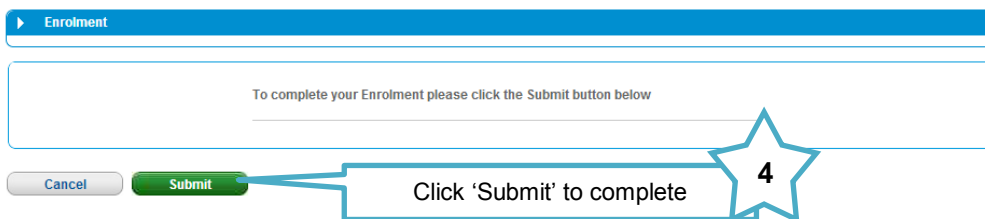
- Edit the information as needed, replacing any draft text/characters previously used to save



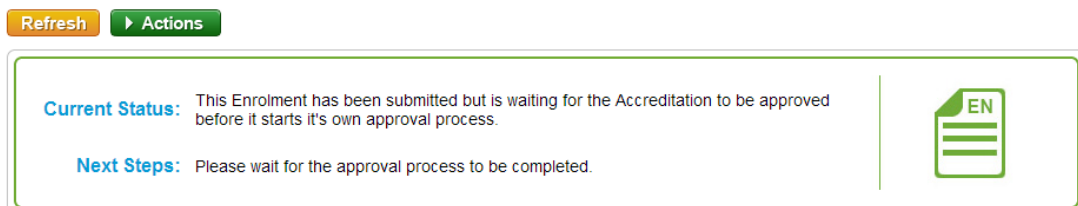
- This process can be repeated as many times as needed, clicking **Finish** frequently to save your current workings.
- When complete use the 'Actions' icon to 'Submit'



- Click 'Submit' to complete



- The status of the Enrolment will show as submitted



Alternatively, you can answer the questions outside of the system and copy and paste them into the answer fields.

# Summary Pages

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

## Enrolment Summary:

**Enrolment Summary:**

**Current Status:** This Enrolment is approved. The supplier is now eligible to make Offers

**Next Steps:** No further action required.

**Enrolment - EN5020**

**System Supplier** **Bromley**  
THE LONDON BOROUGH  
www.bromley.gov.uk

Enrolment #: EN5020  
 Accreditation #: **AC8051** *Link to the Accreditation summary page*  
 Client Name: London Borough of Bromley  
 Category: Education & Support Services  
 Supplier Name: Supplier Bromley 2  
 Location: Supplier Bromley 2  
 Status:

**Additional Items**  
Printable Detail

**Documents (18)**

Document Type	File Name	Issue Date	Issue Number	Expiry Date
3-5 year Cashflow Forecast	Test Document.docx			
Balance Sheet (Most Recent)	Test Document.docx			
Cash and Credit Facility Letter	Test Document.docx			
Complaints policy	Test Document.docx			
Directors or Auditors Report	Test Document.docx			
Environmental Management System Certificate/Policy	Test Document.docx			
Full Account Notes	Test Document.docx			

## Accreditation Summary:

**Accreditation Summary:**

**Current Status:** This Accreditation has been approved.

**Next Steps:** Any linked Enrolments are now also eligible to be approved.

**Accreditation - AC8051 - London Borough of Bromley**

**System Supplier** **Bromley**  
THE LONDON BOROUGH  
www.bromley.gov.uk

Accreditation #: AC8051  
 Client Name: London Borough of Bromley  
 Category: Education and Support Services  
 Supplier Name:  
 Status:

**Other Items**  
Printable Detail

**Documents (5)**

Document Type	File Name	Issue Date	Issue Number	Expiry Date
Employer's Liability Insurance Certificate	Test Document.docx			
Professional Indemnity Insurance Certificate	Test Document.docx			
Public Liability Insurance Certificate	Test Document.docx			
Self Bill Agreement	Test Document.docx			
Signature Document	Test Document.docx			

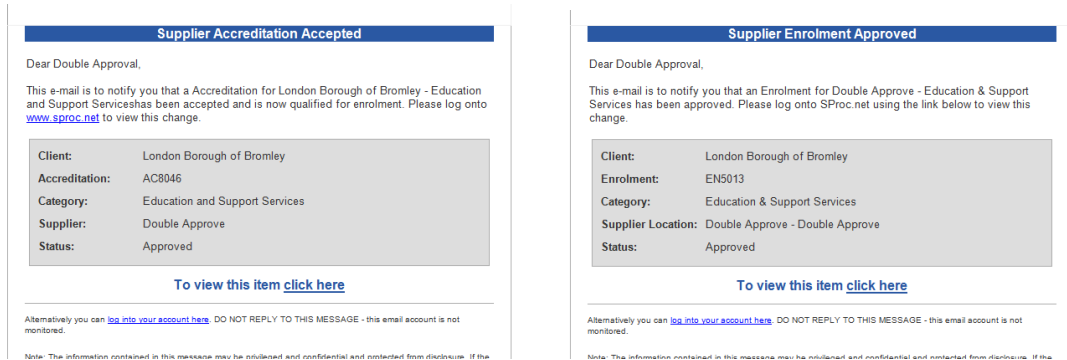
**Questions (5)**

Question Type	Question Text	Answer
Insurances	Are you self-employed/a consultant, or do you have Employer's Liability Insurance cover for £5 million, or are you willing to put this in place if awarded a Service Agreement? If you have this insurance, please upload your Certificate of Insurance below	Yes

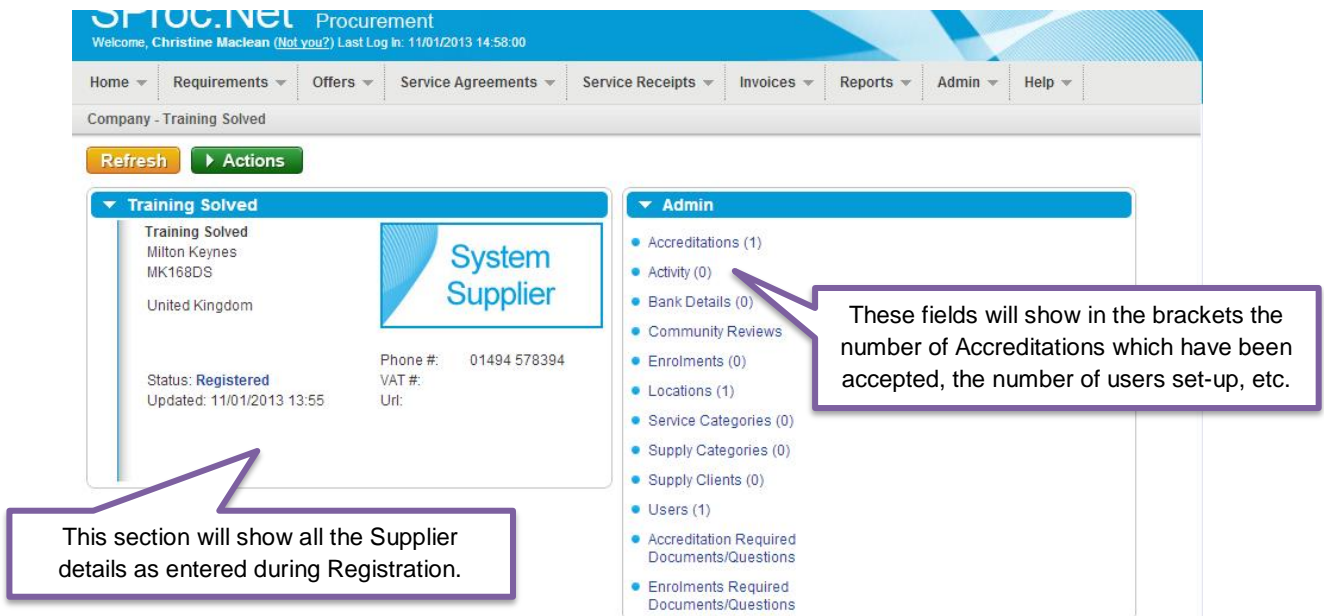


# Email notifications

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

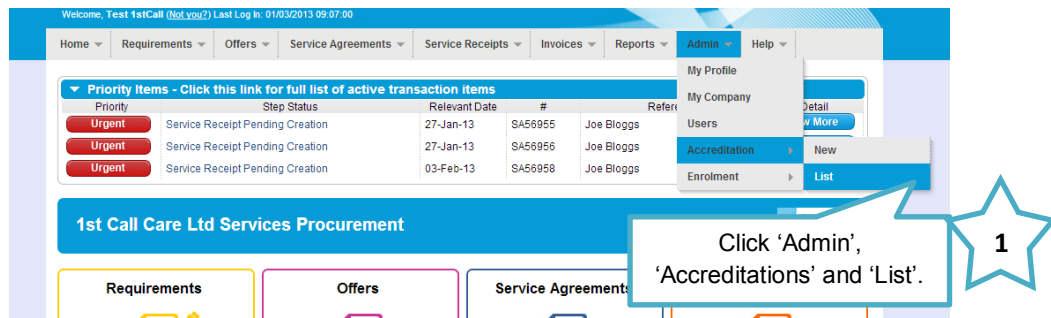


2. You will see all the details of your Accreditation/Enrolment when you login to SProc.Net:

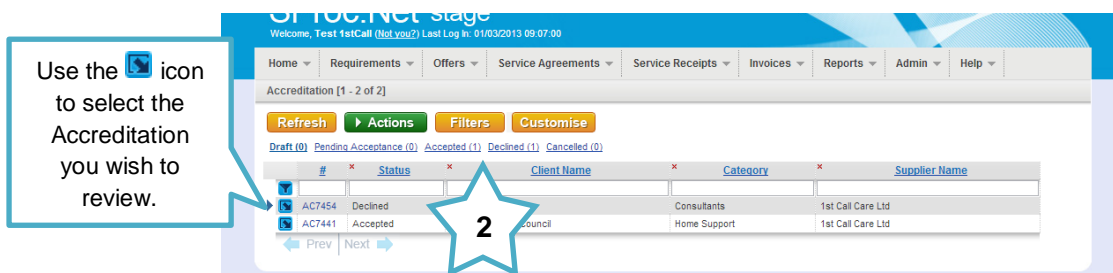


# Resubmitting a Declined Accreditation

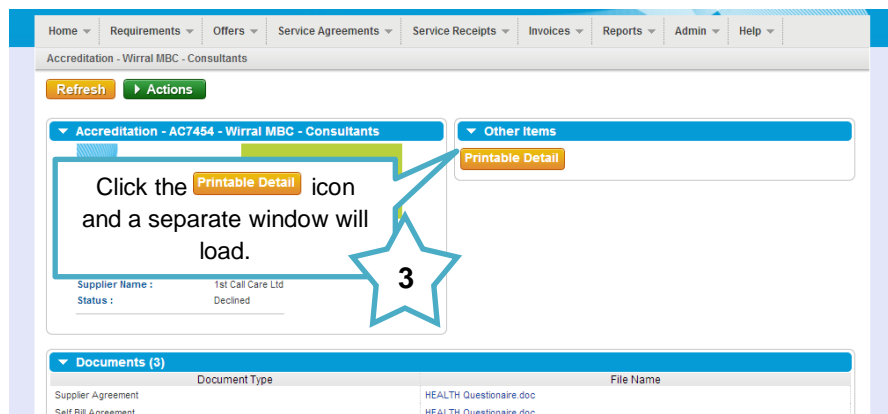
1. If your Accreditation is declined, from your homepage:



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 declined:

**Accreditation**  
# 7454      Status: Declined

Client:      Category:

Supplier: 1st Call Care Ltd  
Status: Declined

Description:      Created by: Test 1stCall  
Created: 01-Mar-2013 09:09  
External Ref.

Question	Answer
Does your company comply with The Equality Act 2010 and observe all of the Protected Characteristics of the Act in line with current legislation?	Yes
Has your company ever been convicted of a criminal offence or grave misconduct relating to the conduct of your business?	No
Has your company ever failed to make taxation payments?	No
If you have answered 'Yes' to any of the above questions highlighted with a '*' symbol and can provide evidence of the corrective actions, please upload any such documents in the 'Documents' section of the accreditation to demonstrate how this is monitored to mitigate the risk of this happening again. (Please select 'Yes' to confirm that you will upload this documentation to this section, if applicable)	No

Document Type	Filename
Supplier Agreement	HEALTH Questionnaire.doc
Self Bill Agreement	HEALTH Questionnaire.doc
Insurance Certificates	HEALTH Questionnaire.doc

Activity	Activity Date	User	
Accreditation Created	01-Mar-2013	Test 1stCall	
Accreditation Submitted	01-Mar-2013	Test 1stCall	
Accreditation Declined	01-Mar-2013	Christine Thomason	Please upload the correct insurance document

1 of 1      User: test1stcall      01-Mar-2013 09:31

Review the details of why the Accreditation was declined.

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

Accreditation - London Borough of Newham - SEND Services

Refresh   Actions

Current   Re-upload Docs & Re-submit   failed Matrix review

Next Steps: Please Re-upload Docs & Re-submit   Re-s reasons for the failure and reupload any

1

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

Accreditation - AC9063 - London Borough of Newham   Other Items   Printable Detail

System Supplier   Newham London

## 6. Update the required information

SProc Net Wizard

Accreditation - London Borough of Newham - SEND Services Re-upload Documents Step 1 of 1

**Download Documents**

Document Type	Old File Name	Review Passed	Failure Reason	Comments
Employers liability Insurance Policy	Training Document.docx	No	Incorrect Document	Out of Date
Professional Indemnity Insurance Policy	Training Document.docx	No	Incorrect Document	Incorrect amount
Public Liability Insurance Policy	Training Document.docx	Yes		
Self Bill Agreement	Training Document.docx	Yes		
Supplier Agreement	Training Document.docx	Yes		

**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
Employers liability Insurance Policy	Training Document.docx		19/02/2014		05/02/2015
Professional Indemnity Insurance Policy	Training Document.docx		27/02/2014		12/02/2015
Public Liability Insurance Policy	Training Document.docx		20/02/2014		17/02/2015
Self Bill Agreement	Training Document.docx		04/02/2014		05/03/2015
Supplier Agreement	Training Document.docx		12/02/2014		04/02/2015

Cancel Submit

Review feedback from Matrix SPS

1 Using the upload icon, upload the revised documentation.

2 Click 'Submit' to continue

## 7. Confirm you agree to the terms and conditions

Accreditation - London Borough of Newham - SEND Services Re-upload Documents Submit Accreditation Step 1 of 1 - Submit Accreditation

**Accreditation**

Matrix SCM 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

By Clicking submit you are agreeing to the Matrix-SCM terms and conditions of Accreditation.

I Agree That I Am Certified To Accept Responsibility For Submitting This Documentation On Behalf Of My Company

2 Click 'Submit' to continue

Cancel Submit

## 8. The Accreditation submission will have updated to show it has been re-submitted to Matrix SPS for review

Accreditation - London Borough of Newham - SEND Services

Refresh Actions

Accreditation status updated

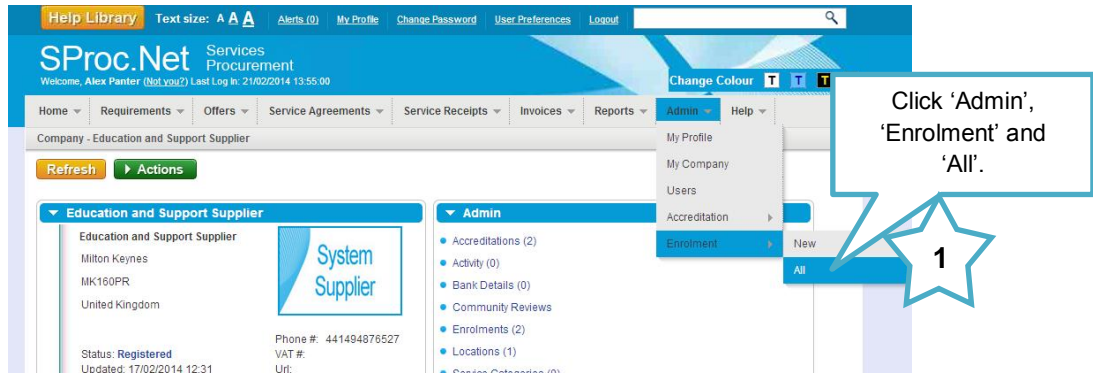
**Current Status:** This Accreditation is pending Matrix review.

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

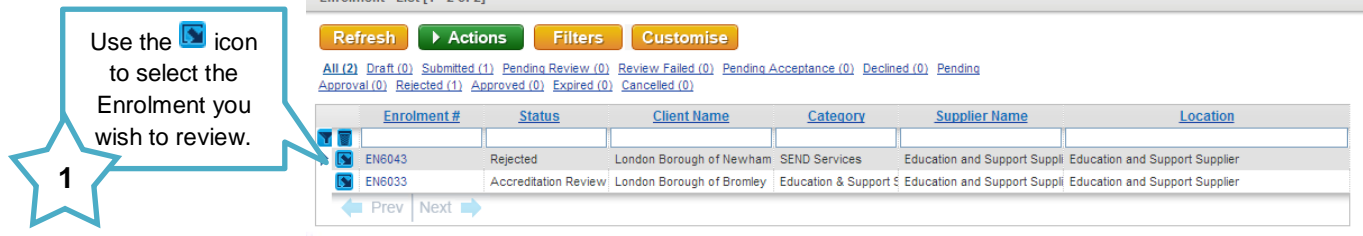
AC

# Resubmitting a Declined Enrolment

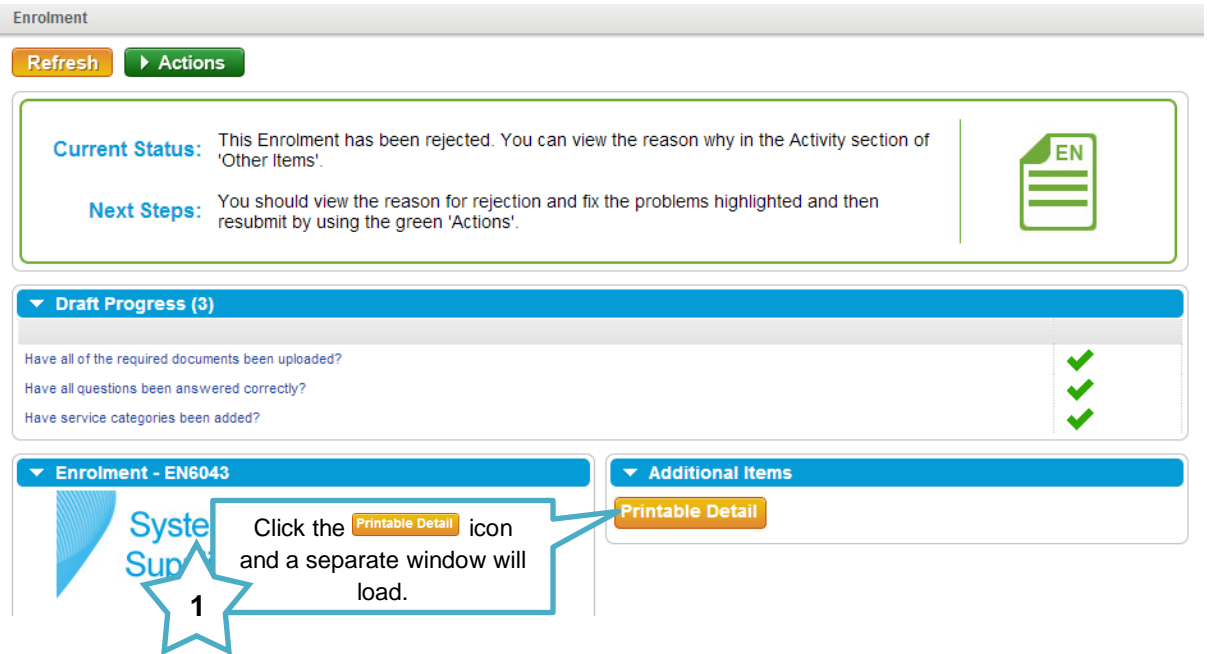
1. If your Enrolment is declined, from your homepage:



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 declined:

1 of 1 | Find | Next

fnVocab(Enrolment,enrolment,P) Detail Report SProc.Net  
Services Procurement

**fnVocab(Enrolment,enrolment,P)**

#: 6043 **Status:** Rejected

Client: London Borough of Newham **Category:** SEND Services

Supplier: Education and Support Supplier **Location:** Education and Support Supplier  
Status: Rejected

Description: **Created by:** Alex Panter  
**Created:** 21/02/2014 13:56  
**External Ref.**  
**Expiry Date:**  
**Expired:** False  
**Approve by Date:** 08/03/2014 14:00  
**Date Approved.**  
**Date Submitted:** 21/02/2014 14:00

fnVocab(Questions and Answers,questions_and_answers,P)		
Question Type	Question	Answer
Referees/References	1. I attest that all referees I have supplied in the below section are independent and legitimate	Yes
Declaration of Interest	10. Are or have any of the <small>(Director/Partner/Proprietor/Secretary/Officer)</small>	Yes

At the bottom of the report there will be an Activity field, this will contain the rejection comments as detailed by the Client:

Service Categories	
Service Category	Tier Level
Services for Groups	
Services for Individuals	

No Rates on this fnVocab(Enrolment,enrolment,P)

Activity			
Activity	Activity Date	User	Comments
Enrolment Rejected	21-Feb-2014	Test Admin	H&S document out of date
Enrolment Accepted	21-Feb-2014	Christine Thomason	
Enrolment Review Passed	21-Feb-2014	Christine Thomason	
Enrolment Submitted	21-Feb-2014	Alex Panter	
Enrolment Created	21-Feb-2014	Alex Panter	

Review the details of why the Enrolment was declined.

1

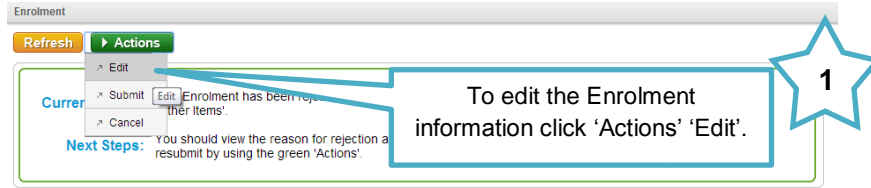
1 of 1

User: alexpanter

21-Feb-2014 14:39

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:

Enrolment Edit Enrolment Step 1 of 1

Enrolment

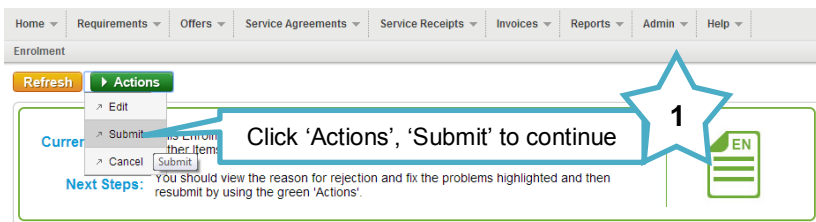
Enrolment Questions

Please answer all of the questions below

Question Type	Question	Answer
Referees/References	1. I attest that all referees I have supplied in the below section are independent and legitimate	Yes
Professional Standing	2. During the last 3 years, has your organisation met the terms of its banking facilities and loan agreements?	Yes
Professional Standing	3. During the last 3 years, has your organisation met all of its obligations to pay its creditors and staff?	Yes
Professional Standing	4. During the last 3 years, has your organisation had any contract terminated for poor performance, or any contract	Yes
Professional Standing	5. During the last 3 years, has your organisation had any county court judgements (or equivalent) made against it?	Yes

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

Enrolment

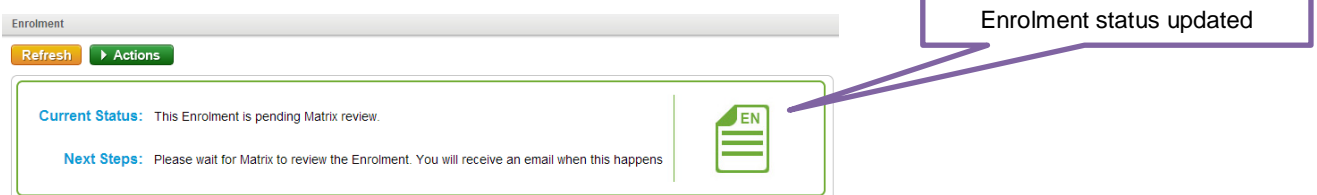
To complete your Enrolment please click the Submit button below

Cancel Submit

Click 'Submit' to complete

2

9. The Enrolment submission will have updated to show it has been re-submitted to Matrix SPS for review



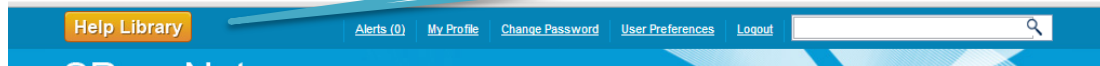
# Need More Support?

The contact details for your SProc.Net system support are below:

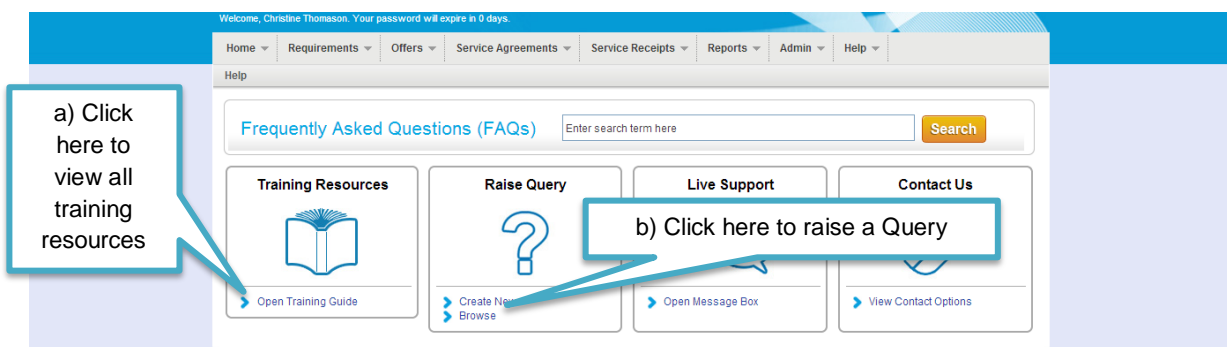
**Supplier Phone Number: 0871 474 0332**

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

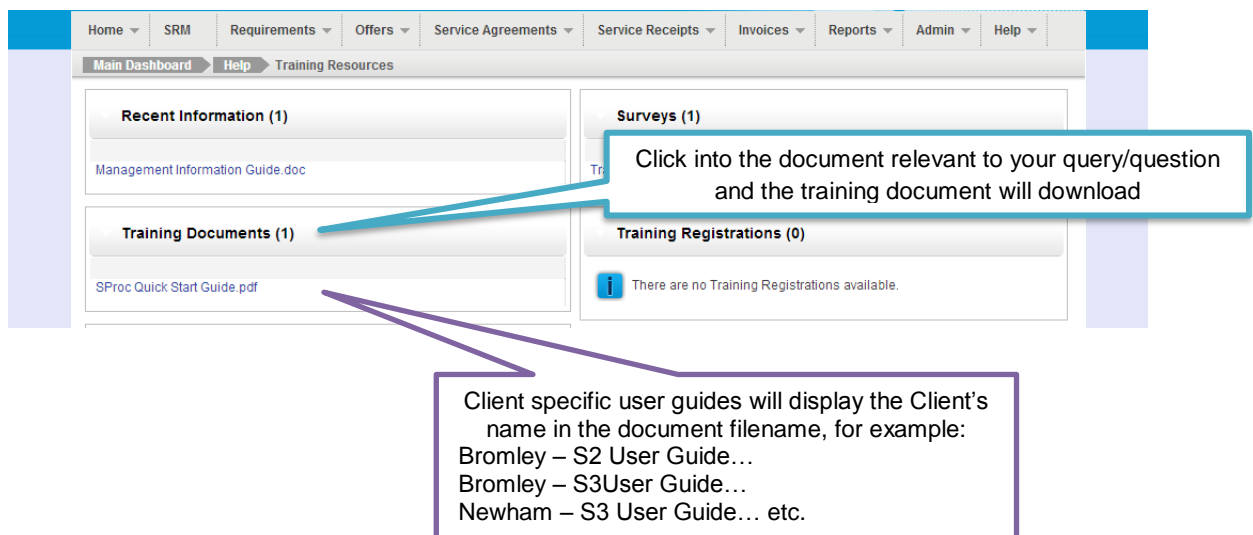
Click into the 'Help Library' icon on your homepage



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) Queries can be raised to the Matrix SPS Account Management team:

The screenshot shows a web form for raising a query. It is divided into two main sections: 'Basic Details' and 'Additional Information'. The 'Basic Details' section includes dropdown menus for 'BCC' (set to 'Birmingham City Council'), 'Type', 'Reason', and 'Reason Sub Type', and text input fields for 'Subject' and 'Description'. The 'Additional Information' section includes a 'Query File' field with an attachment icon and a 'Contact Phone' field. Below the form are 'Cancel' and 'Save' buttons. Three callout boxes provide instructions: one pointing to the form fields stating 'Input all the details of your query/question as instructed', one pointing to the attachment icon stating 'Upload any files relevant to your question using the icon', and one pointing to the 'Save' button stating 'Click 'Save' to send'.

- ➔ A member of the Matrix SPS Account Management team will be assigned your Query and they will respond to you with an answer.
- ➔ Each individual Query has its own unique reference number which will detail the question and the response.
- ➔ You can look through all the Queries you have raised and any that have been raised by members of your team (details of who is in your SProc.Net team can be found in your profile in the 'My Team' section) by clicking into the 'Browse' link under the Queries section of the Help Library.

The screenshot shows the 'Queries' section of the Matrix SPS Account Management interface. The navigation menu at the top includes 'Home', 'SRM', 'Requirements', 'Offers', 'Service Agreements', 'Service Receipts', 'Invoices', 'Reports', 'Admin', and 'Help'. The 'Queries' section is currently active. It displays a table of 'New Queries (1)' with columns for 'Query #', 'BCC', 'Type', 'Assigned To', and 'Date Created'. The table shows one query with ID 'QR10994' assigned to 'Birmingham City Council' with the type 'Question' and created on '25/02/2013 11:06'. Below the table are four sections for 'Active Queries (0)', 'Closed Queries (0)', 'Returned Queries (0)', and 'Re-Opened Queries (0)', each with an information icon and the text 'There are no records to display.' A callout box points to the 'Closed Queries' section with the text 'All Queries that have been raised by you or your team'.

All these support options are also displayed on your SProc.Net homepage with your helpline phone number:

<b>Requirements</b>  <ul style="list-style-type: none"><li>&gt; All</li><li>&gt; New Requirement</li><li>&gt; Draft (44)</li><li>&gt; Pending Distribution (0)</li><li>&gt; Open (50+)</li><li>&gt; On Hold (50+)</li></ul>	<b>Offers</b>  <ul style="list-style-type: none"><li>&gt; All</li><li>&gt; Submitted (15)</li><li>&gt; Under Consideration (50+)</li><li>&gt; Pending S-A (38)</li></ul>	<b>Service Agreements</b>  <ul style="list-style-type: none"><li>&gt; All</li><li>&gt; Pending Approval (1)</li><li>&gt; Pending Acceptance (6)</li><li>&gt; Active (37)</li></ul>	<b>Service Receipts</b>  <ul style="list-style-type: none"><li>&gt; All</li><li>&gt; Pending Approval (14)</li><li>&gt; Rejected (0)</li><li>&gt; Approved (4)</li></ul>
<b>Admin</b> <a href="#">&gt; My Profile</a> <a href="#">&gt; Accreditations</a> <a href="#">&gt; Enrolments</a> <a href="#">&gt; Users</a>			
<b>Help Dashboard</b>  <ul style="list-style-type: none"><li>&gt; What's New? Options</li></ul>	<b>Raise Query</b>  <ul style="list-style-type: none"><li>&gt; Create New</li><li>&gt; Browse</li></ul>	<b>Operations Centre</b> 	<b>Email Us</b>  <ul style="list-style-type: none"><li>&gt; <a href="#">Click here</a></li></ul>