

# Training Slides – Procurement at Moorfields

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# Agenda

- Who are Partners Procurement Service?
- PPS Helpdesk
- PPS Website
- What is Procurement?
- Value for Money and Competition
- Frameworks – What are they?
- Waivers – Principles
- Waiver Process
- Requisitions and Purchase orders
- What do I include on my requisition?
- PECOS – PO System and Processes

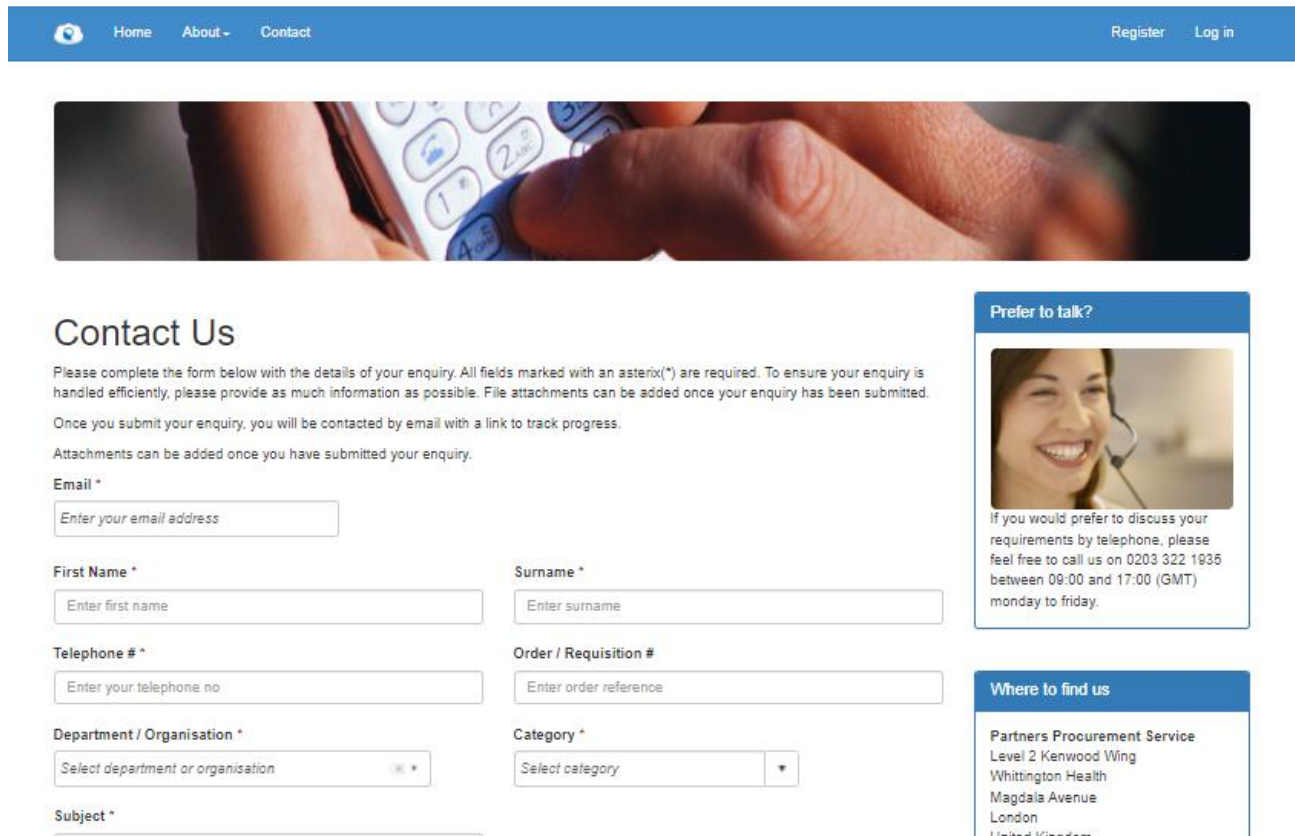
## Who are Partners Procurement Service (PPS)?

- We are Moorfields' Procurement service
- NHS Employees hosted by Whittington Health
- Not an outsourced procurement function – a shared service
- Instead of one procurement department per Trust, we work across 4 Trusts: Moorfields, Royal Free, Whittington and North Middlesex
- Consists of:
  - Non-Clinical Category Teams
  - Clinical Category Team
  - Operational Equipping Team
  - Supply Chain Team
  - Operational Buying Team
  - Customer Service Team (helpdesk)
  - Systems Team

## What's the PPS Helpdesk and how can I use it?

### PPS Helpdesk – [www.nhspps.uk](http://www.nhspps.uk)

- Helpdesk is on the PPS website where enquiries can be logged
- Register and log in to track your enquiries:



The screenshot shows the PPS Helpdesk website interface. At the top is a blue navigation bar with links for Home, About, Contact, Register, and Log in. Below the navigation bar is a large image of hands using a mobile phone. The main content area is titled "Contact Us" and contains a form for submitting enquiries. The form includes fields for Email, First Name, Surname, Telephone #, Order / Requisition #, Department / Organisation, Category, and Subject. There are also two informational boxes on the right side of the form.

**Contact Us**

Please complete the form below with the details of your enquiry. All fields marked with an asterisk(\*) are required. To ensure your enquiry is handled efficiently, please provide as much information as possible. File attachments can be added once your enquiry has been submitted.

Once you submit your enquiry, you will be contacted by email with a link to track progress.

Attachments can be added once you have submitted your enquiry.

**Email \***

**First Name \***

**Surname \***

**Telephone # \***


**Order / Requisition #**

**Department / Organisation \***

**Category \***

**Subject \***

**Prefer to talk?**



If you would prefer to discuss your requirements by telephone, please feel free to call us on 0203 322 1935 between 09:00 and 17:00 (GMT) monday to friday.

**Where to find us**

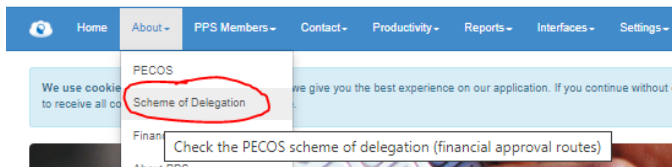
Partners Procurement Service  
Level 2 Kenwood Wing  
Whittington Health  
Magdala Avenue  
London  
United Kingdom

## What's the PPS Website and how can I use it?

[www.nhspps.uk](http://www.nhspps.uk)

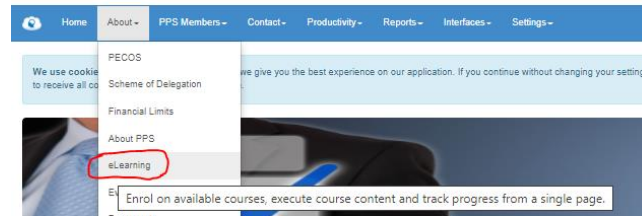
### Scheme of Delegation Wizard

See who your approvers are for your cost centre or Trust



### Find your PECOS e-Learning

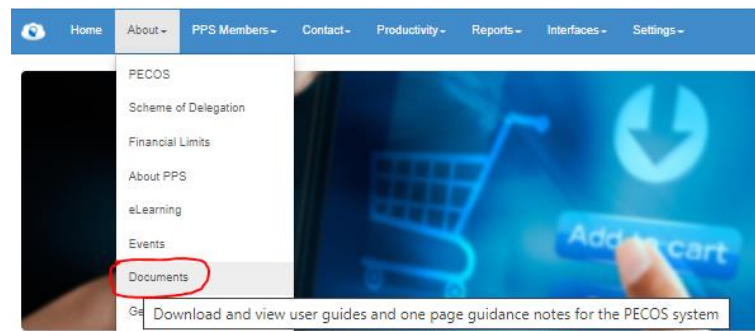
Find all online learning modules – can be accessed anywhere



### Find all procurement documents

Documents include:

- PECOS Quick Guides
- Procurement Guide
- Trust SFI's
- Waiver Forms
- New Clinical Product Request Forms
- New Supplier Forms
- PECOS User Form
- Smart Form user guide



## What is Procurement?

**Procurement** is the process of finding, agreeing terms and acquiring goods, services or works often via a tendering or competitive bidding process.

The process is used to ensure the Trust receives goods, services or works at the **best possible price**, when aspects such as **quality, quantity, time** and **service** are compared

Promotes **fair** and **open** competition whilst **minimising risk**, such as exposure to **fraud, collusion** and **poor reputation**

## Value for Money & Competition

- Demonstrate VFM on all expenditure.
- Level and scale of competition proportionate to the level of spend, complexity and risk associated.

### Trust Standing Financial Instructions:

#### Works:

Value (ex VAT)	Conditions
> £4,477,174 (FTS threshold)	Government Procurement requirements adhered to (published and formal tender)
£500,000 to £4,477,174	Min 5 competitive tenders received for works/estates
£300,000 to £499,999	Min 4 written separate supplier quotations received for works/estates
£10,000 to £299,999	3 or more written separate supplier quotations received for works/estates
Under £10,000	Best purchasing practice

#### Supplies/Services:

Value (ex VAT)	Conditions
>116,407 (FTS threshold)	Government Procurement requirements adhered to (published and formal tender)
£50,000 to £116,407	4 or more written separate supplier quotations received for supplies/services
£5,000 to £49,999	3 or more written separate supplier quotations received for supplies/services
Under £5,000	1 written supplier quotation received for supplies/services

## Frameworks – what are they?

- Provides a compliant route to market without the need for an lengthy tender process
- Pre-tendered agreements with numerous suppliers
- Framework length - 4 years then re-tendered to allow new competition
- Contact PPS to

### Two types of Frameworks:

#### Direct award

- Sets out the terms and conditions governing the provision of the works, services and/or products
- Has a clear and prescriptive pricing mechanism

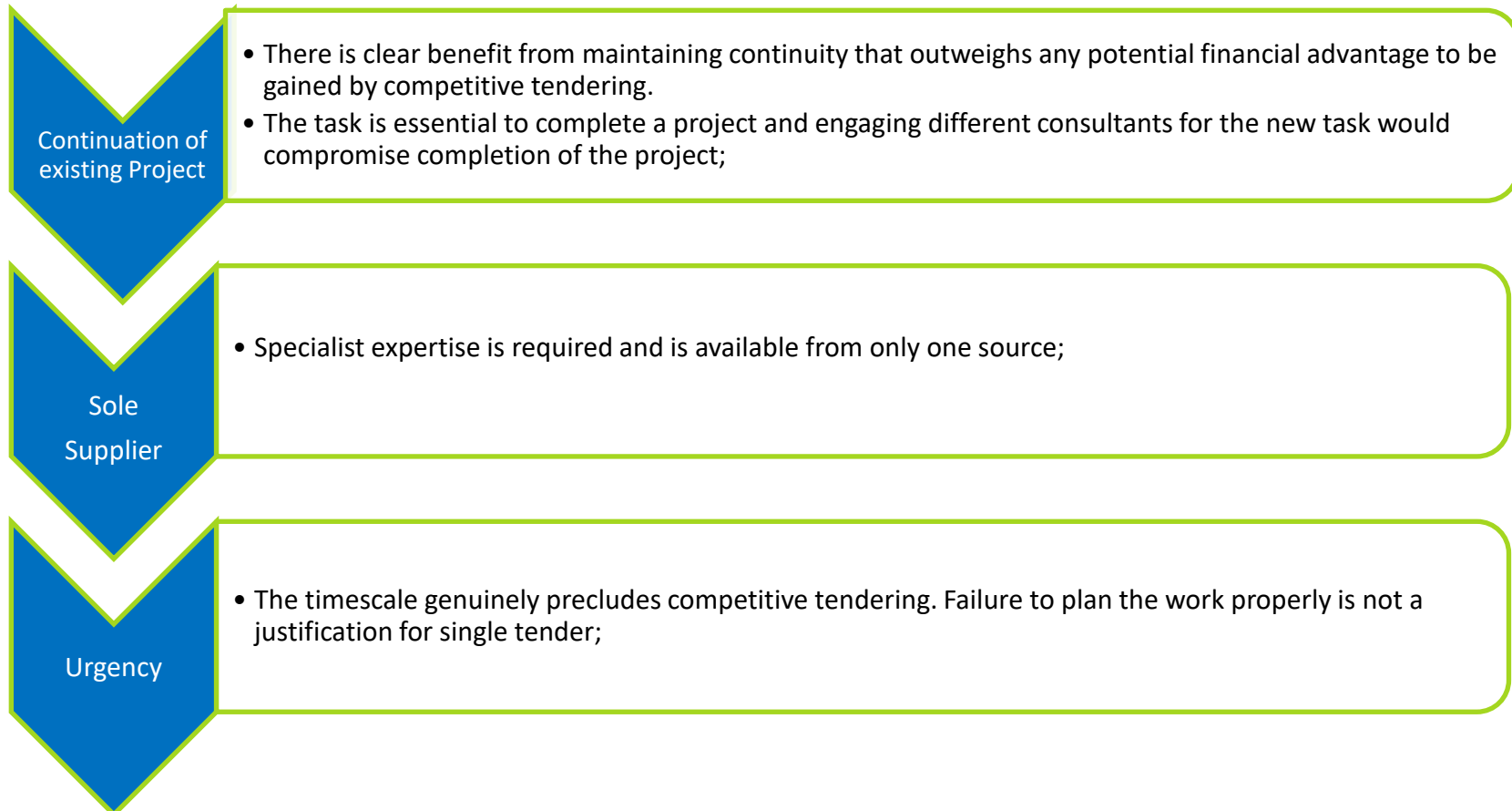
#### Further competition

- Does not include all the terms governing the provision of the works, services and supplies
- Need to establish price/cost of goods/service
- Frameworks have templates and supporting guidance for running a mini- competition

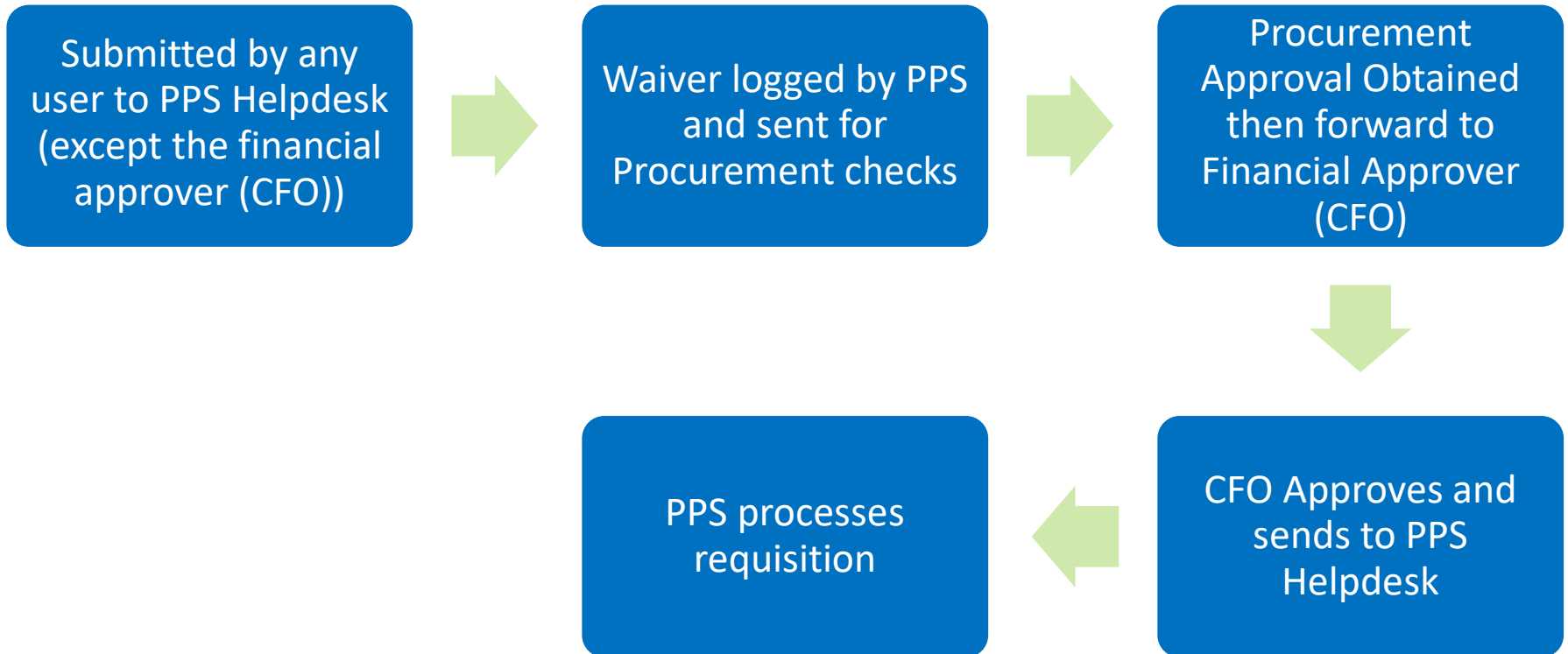


## Waivers - Principles

- Waivers are used when there is no possibility of meeting the Trust SFI's (getting quotes/tenders) and there is no competition, or the requirement is exceptionally urgent.
- **Always put as much supporting information on the waiver to justify your reasons for the waiver. Waiver is the last resort!**
- A waiver must only be used in the following circumstances (only under procurement threshold value):

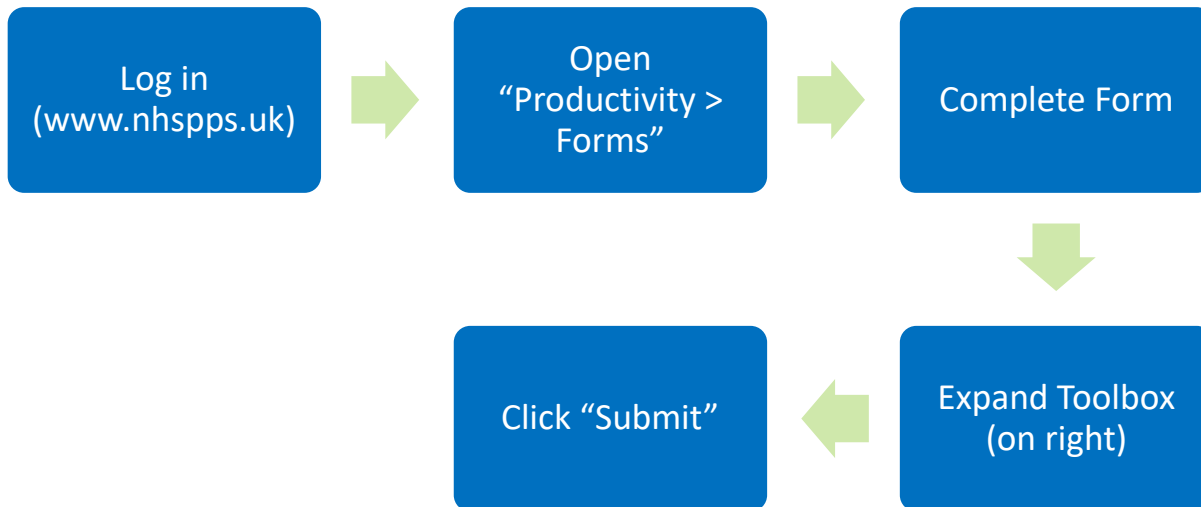


## Waiver Process



## Waiver Process SMART FORMS

We have now implemented “smart waiver forms” where you are able to complete your waiver online:



- Once the form has been submitted, it will be sent via a workflow to PPS to log and approve
- Once approved by Procurement, Wayne Sexton and then Jonathan Wilson will approve

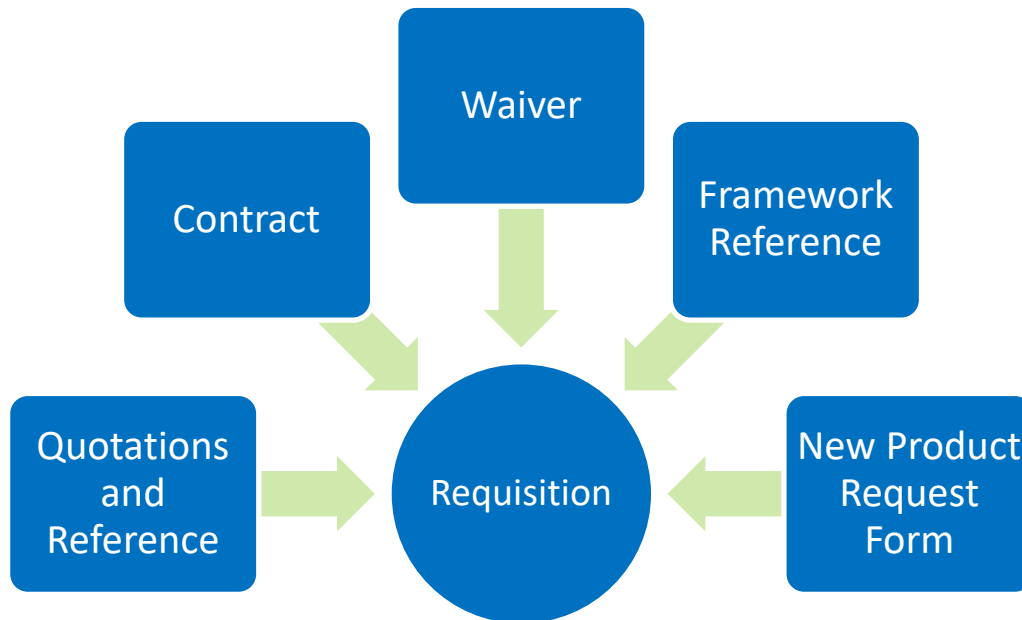
Please find the user guide here: [www.nhspps.uk](http://www.nhspps.uk)

## Requisitions and Purchase Orders (PECOS)

- Internal request for goods or services to be delivered against an existing contract, or for a contract to be initiated.
- Commitment from you to Procurement to spend your department's budget.
- Once approved by the budget holder and Procurement a purchase order is generated
- Authorisation to spend this money needs to be approved through an approval hierarchy (Scheme of Delegation)
- Requisitioners need to know what they are requisitioning for and what information is required
- No requisition should be used as a Purchase Order

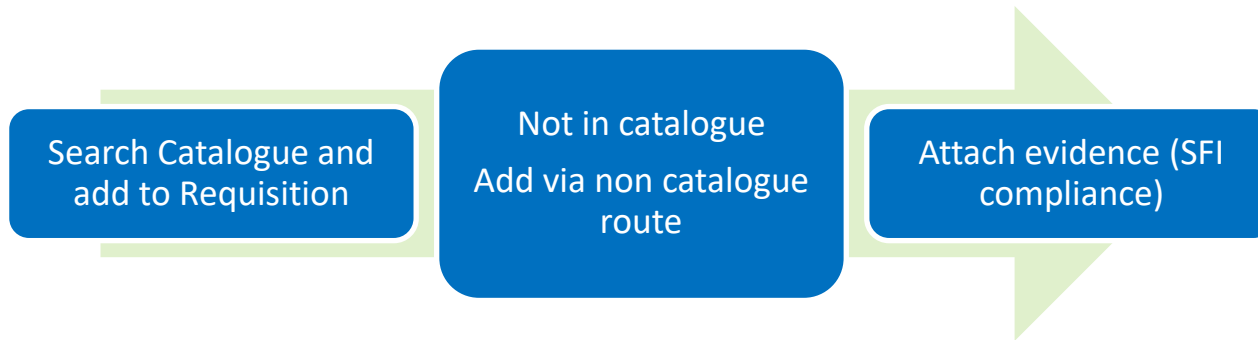
## What do I need to include on my requisition?

- Follow SFI's (quotes/tenders/waiver)
- Attach the evidence to requisition
- Not all the following will be applicable to every requisition
- Products on catalogue will be released automatically as already on an agreed contract



## PECOS – Purchase ordering system

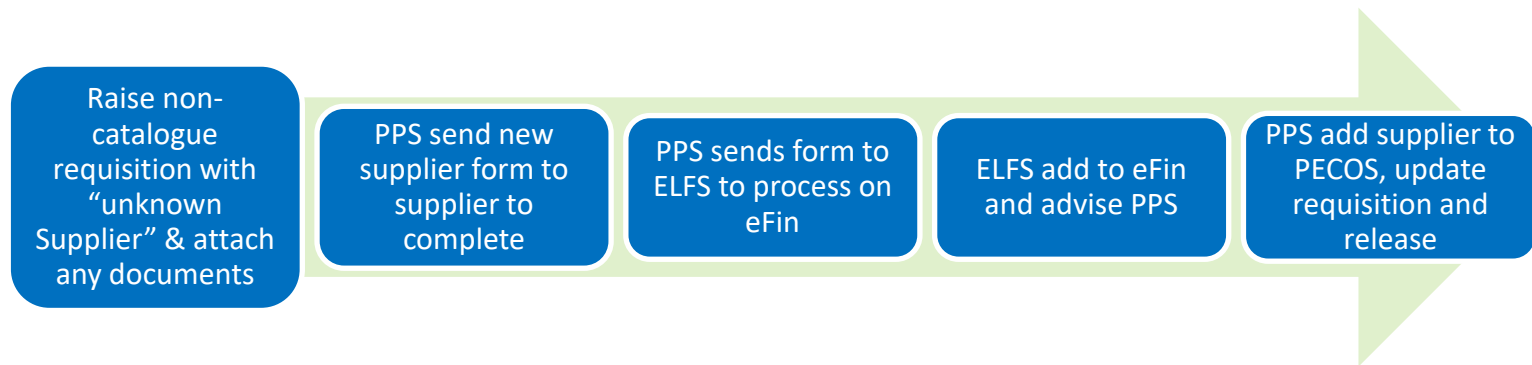
### Products



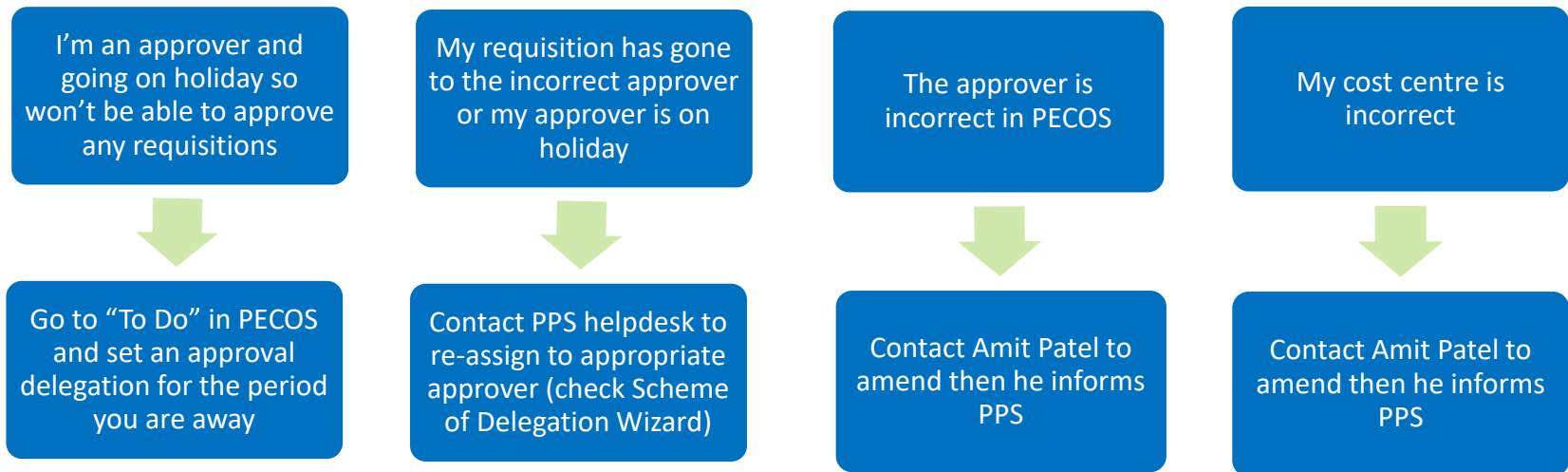
### Services



## Supplier isn't on PECOS

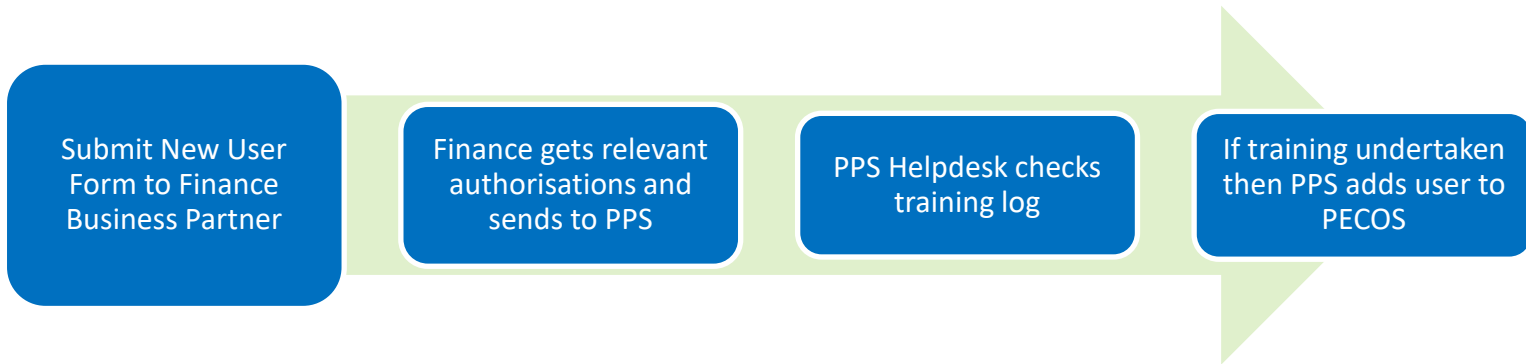


## Scheme of Delegation (Please note the same person cannot be a requisitioner AND an approver)



## PECOS – Processes

### New User Set up



Always download any forms directly from website due to version control!



# Contact Details and Training



Please contact Procurement on the following:

PPS Helpdesk: [www.nhspps.uk](http://www.nhspps.uk)

Call: 020 3322 1935

E-mail: [helpdesk@nhspps.uk](mailto:helpdesk@nhspps.uk)

Training for PECOS is online: [Course List – PECOS](#)

Quick Guides: [Quick Guides](#)