

# Procurement Training - Royal Free 2024

# 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

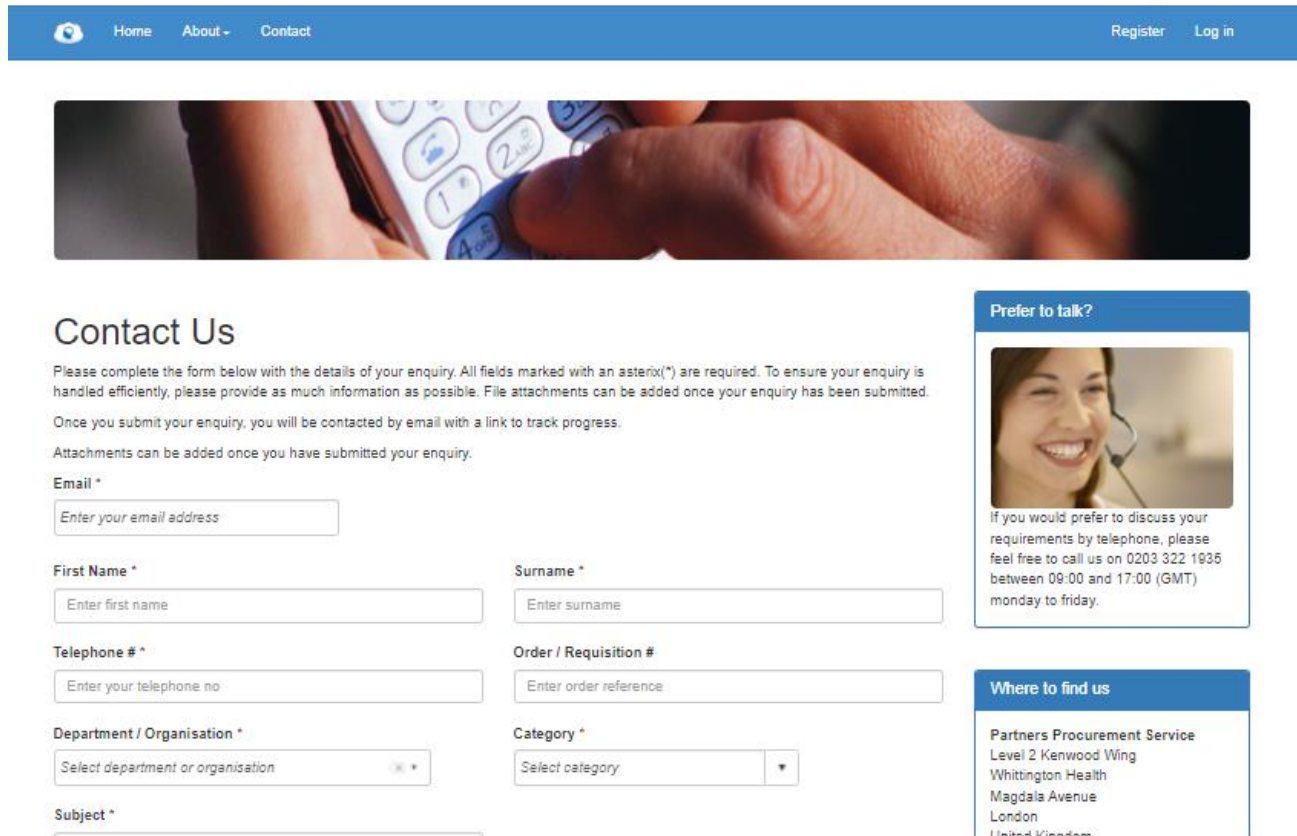
## Who are Partners Procurement Service (PPS)?

- We are Royal Free's 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 'Contact Us' form on the PPS website. The form is titled 'Contact Us' and includes a navigation bar at the top with links for Home, About, and Contact, and buttons for Register and Log in. Below the navigation bar is a large image of hands typing on a mobile phone. The form itself contains several fields: Email, First Name, Surname, Telephone #, Order / Requisition #, Department / Organisation, and Subject. There are also two sidebars: 'Prefer to talk?' with a photo of a smiling woman and text about telephone enquiries, and 'Where to find us' with the address: Partners Procurement Service, Level 2 Kenwood Wing, Whittington Health, Magdala Avenue, London, United Kingdom.

Home About - Contact Register Log in

## 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 \***  
Enter your email address

**First Name \***  
Enter first name

**Surname \***  
Enter surname

**Telephone # \***  
Enter your telephone no


**Order / Requisition #**  
Enter order reference

**Department / Organisation \***  
Select department or organisation

**Category \***  
Select 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**

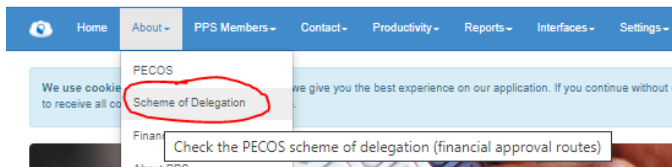
Partners Procurement Service  
Level 2 Kenwood Wing  
Whittington Health  
Magdala Avenue  
London  
United Kingdom

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

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

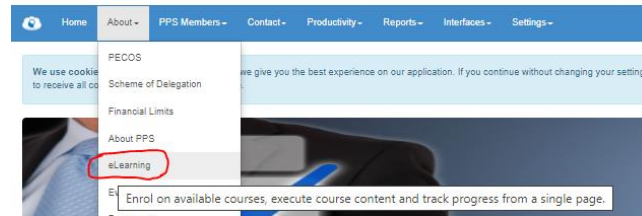
## Scheme of Delegation Wizard

See who your approvers are for your cost centre or Trust



## Find your PECOS e-Learning

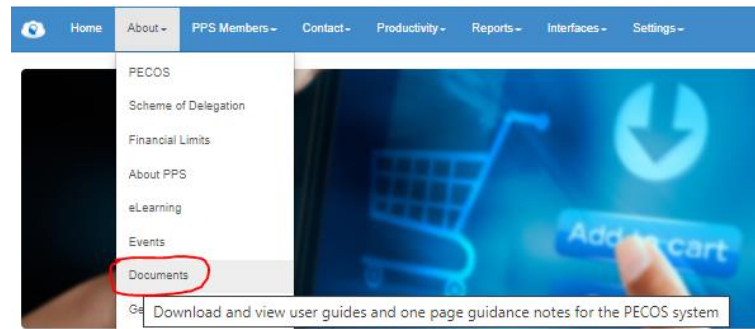
Find all online learning modules – can be accessed anywhere



## 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



# 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:

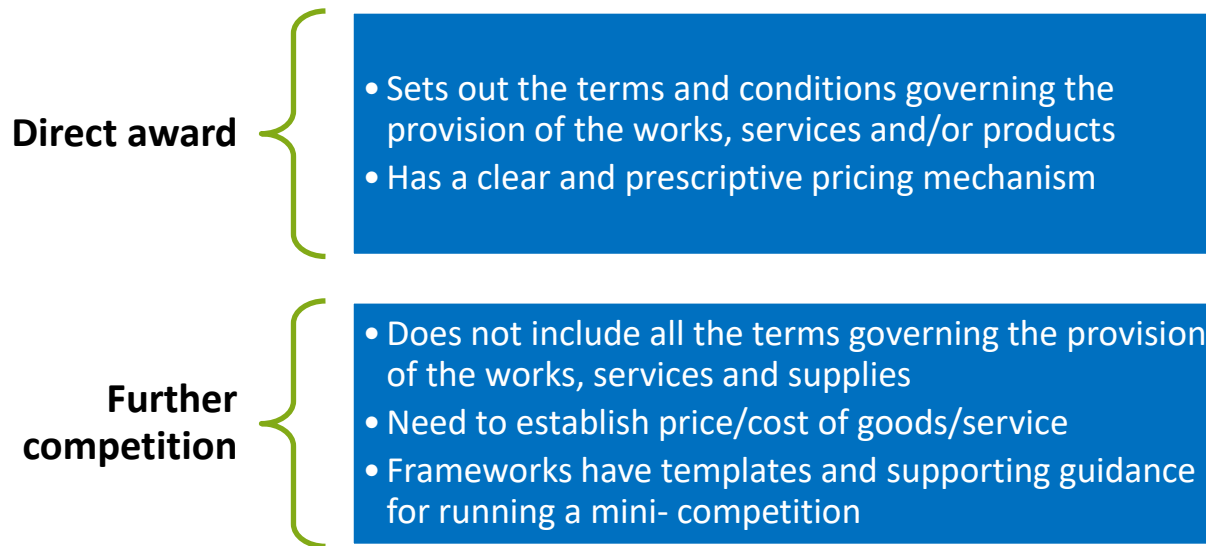
### Supplies/Services:

Value (ex VAT)	Conditions
>£116,407 (FTS threshold)	Government Procurement requirements adhered to (published and formal tender)
>£90,000	As per Government Tendering Regulations (Scheme of Delegation states above £90k)
£30,000 to £115,633	3 or more written tenders received for supplies/services
£5,000 to £30,000	3 or more written separate supplier quotations received for supplies/services
Under £5,000	1 or more 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

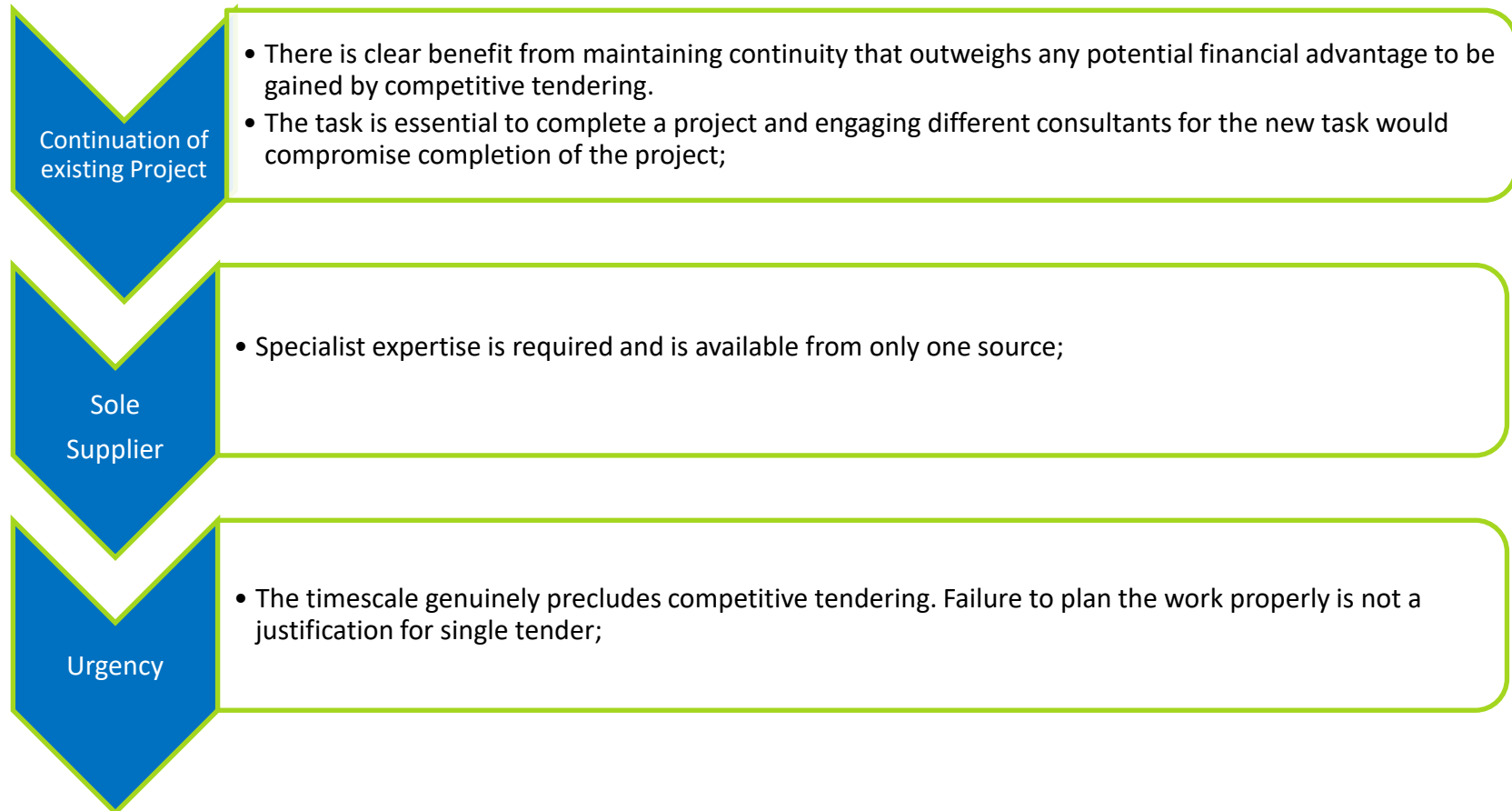
## Two types of Frameworks:



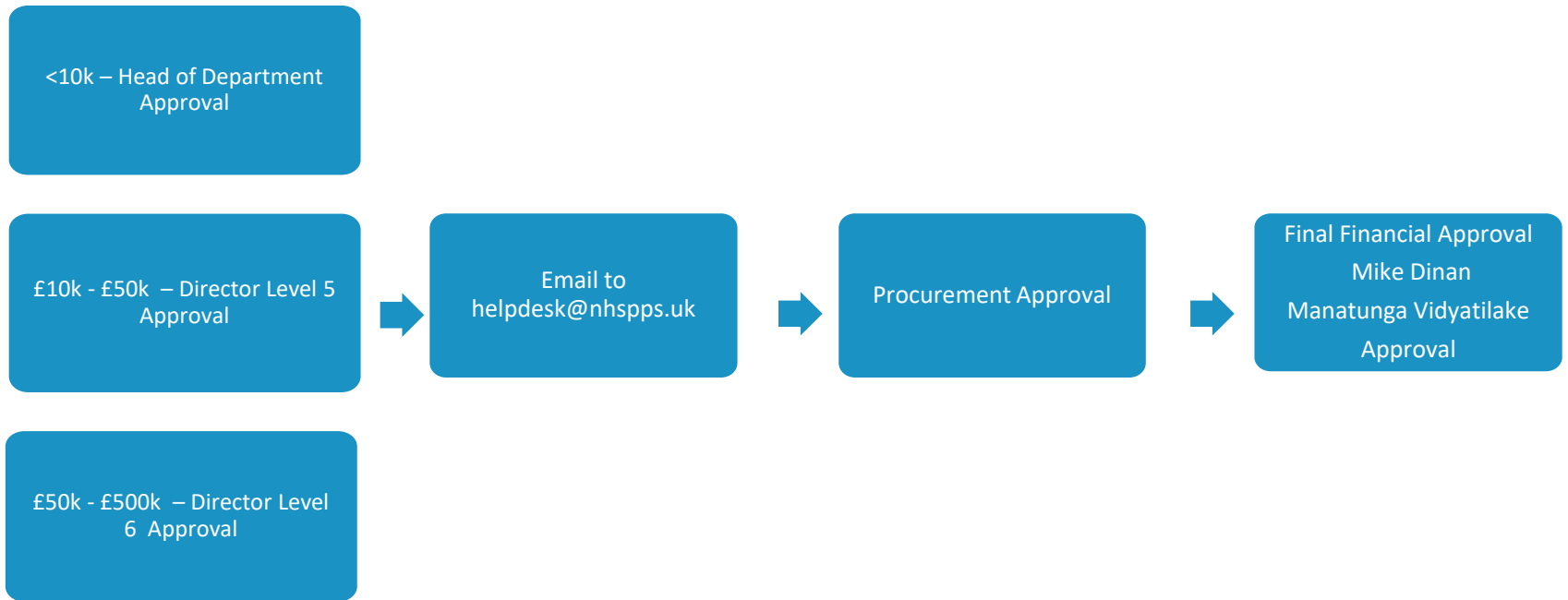


## Waivers - Principles

- 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



- The waiver needs to originate from the appropriate approver as per levels above. Where the originator is Head of Department then it must be sent to next level approver depending on expenditure before being submitted to the PPS Helpdesk.
- To find your level 5 or 6 approver, please refer to the Scheme of Delegation Wizard on the PPS website: [Scheme of Delegation Wizard](#)

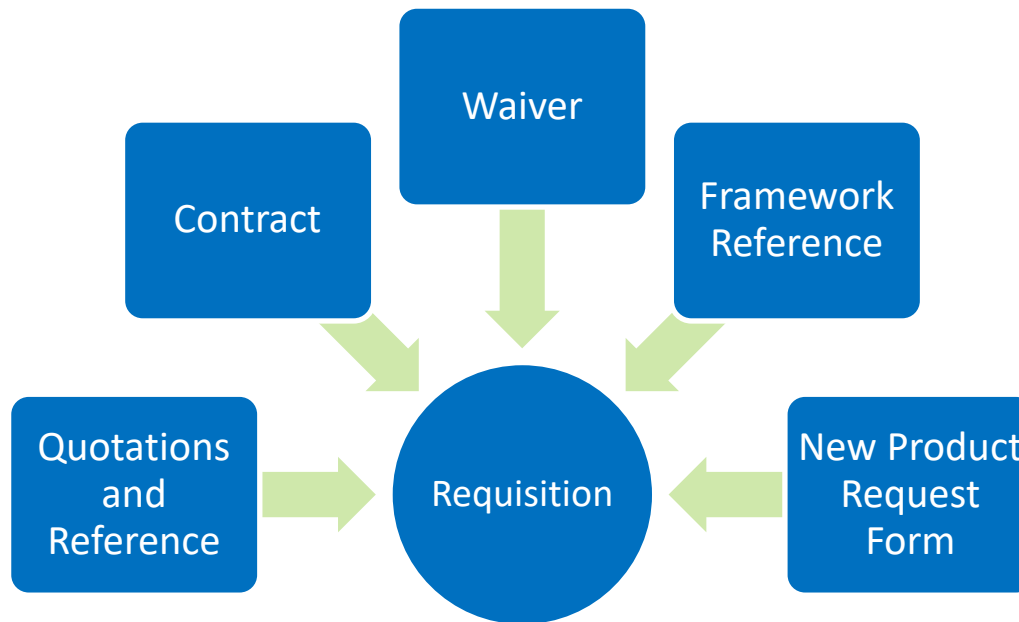
# Requisitions and Purchase Orders (PECOS)



- 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 number should be used as a Purchase Order number

# What do I need to include on my requisition?

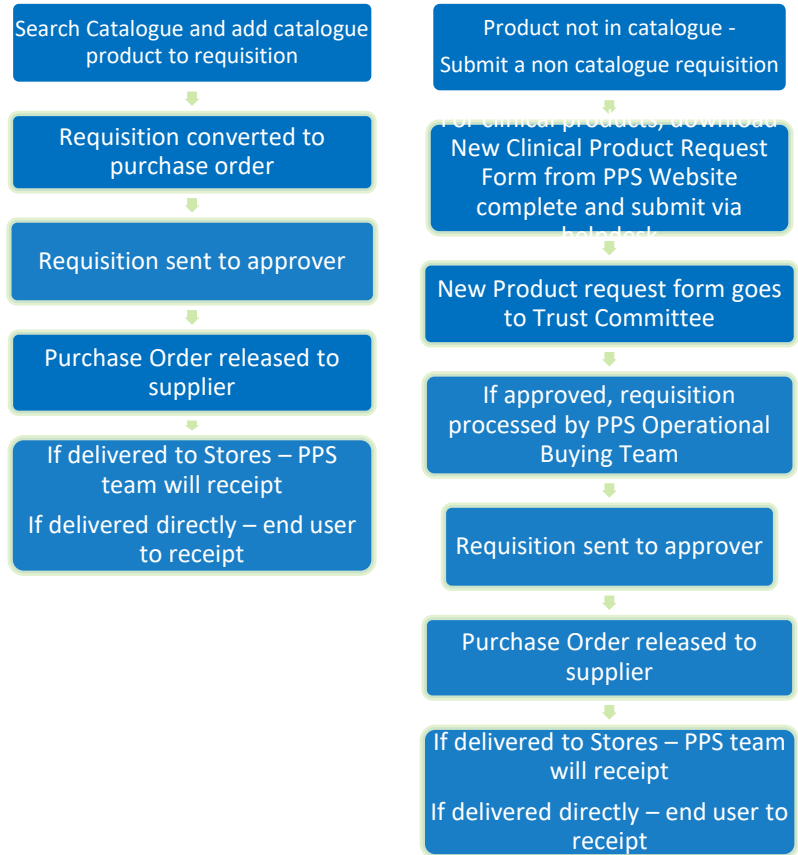
- Follow SFI's (quotes/tenders/waiver)
- Attach the evidence to requisition
- Not all the following will be applicable to every requisition
- Products on catalogue will be released automatically as already on an agreed contract
- Discretionary Spend (furniture, IT) – The Trust have got additional approvals for discretionary spend items so there could be a delay.



# PECOS – Purchase ordering system



## Products



## Services



# PECOS – Approvals



- Requisitions are required to go to your financial approver once all the checks have been completed
- All approvers for your cost centres are set by Royal Free Finance so any amendments need to go through Finance who then advise PPS to change in PECOS
- All requisitions go straight to the approver set at that level of expenditure as per below:

	Level 1	Level 2	Level 3	Level 4	Level 5	Level 6	Level 7	Level 8
RFL	N/A	£0k-£5k	£5k-£10k	£10k-£30k	£30k-£50k	£50k-£500k	>£500k	N/A

- To find your approver for your cost centre, you can use the Scheme of Delegation Wizard on our website: [www.nhspps.uk](http://www.nhspps.uk)
- Go to “About” then “Scheme of Delegation” and search through the various options:

Home About PPS Members Contact Productivity Reports Interfaces Settings Hello, Lyndsey Log off

## Scheme of Delegation

Use this wizard to query the PECOS scheme of delegation and understand the financial approval routes within the Trust.

### Step 1: Select Search Option

Ready to begin? Select the type of search from the below options.

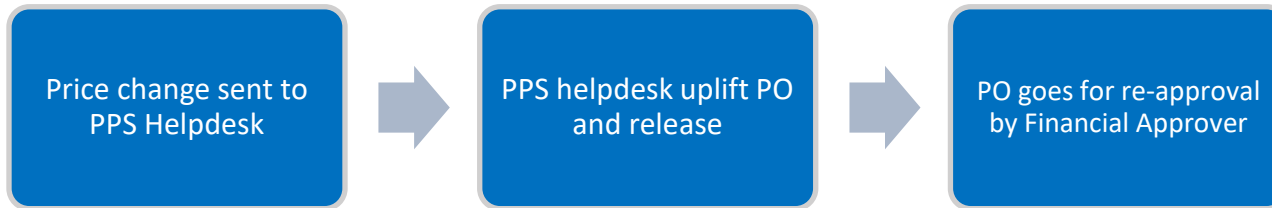
1. My routes 2. Cost centre 3. Trust 4. Requisitioner 5. Approver

- Please note that there are some discretionary approval levels set up for certain products/services ie: equipment These will be sent to an authorised approver BEFORE going to the financial approvers. You can see who your requisition is sitting with in the audit trail on PECOS when you click on the requisition.

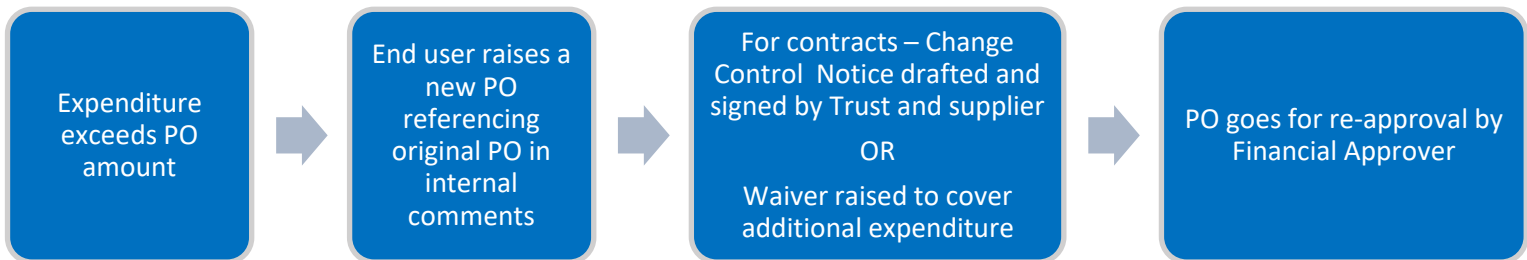
# PECOS – Additional Expenditure - Purchase Orders

- In some cases, there is expenditure required outside of the original purchase order amount.
- Examples: a service has overrun, or prices are incorrect on the purchase order
- All additional expenditure is subject to the Trust SFI's and **MUST** be approved by senior representatives within the Trust
- The Trust processes are slightly different for products and services:

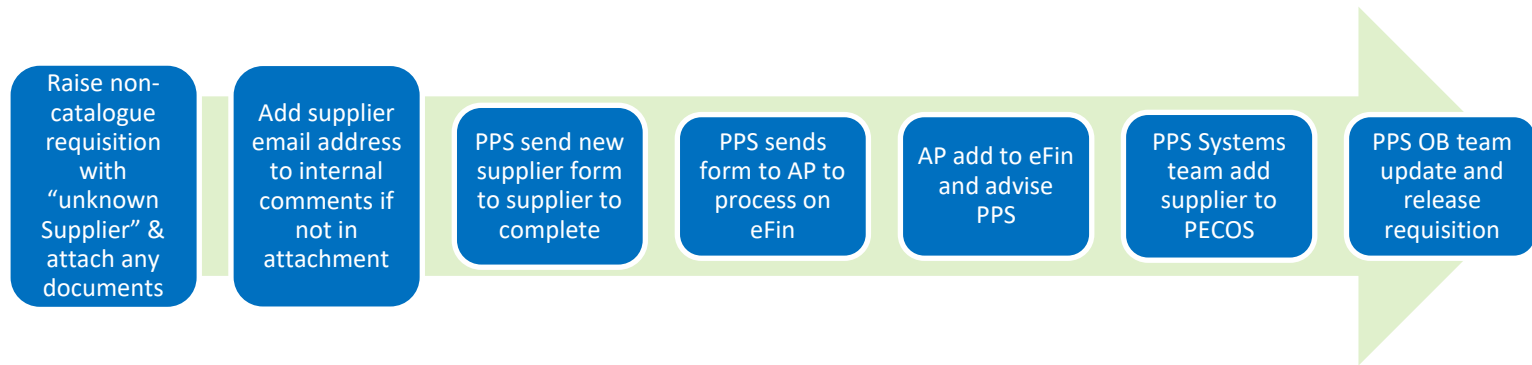
## Products



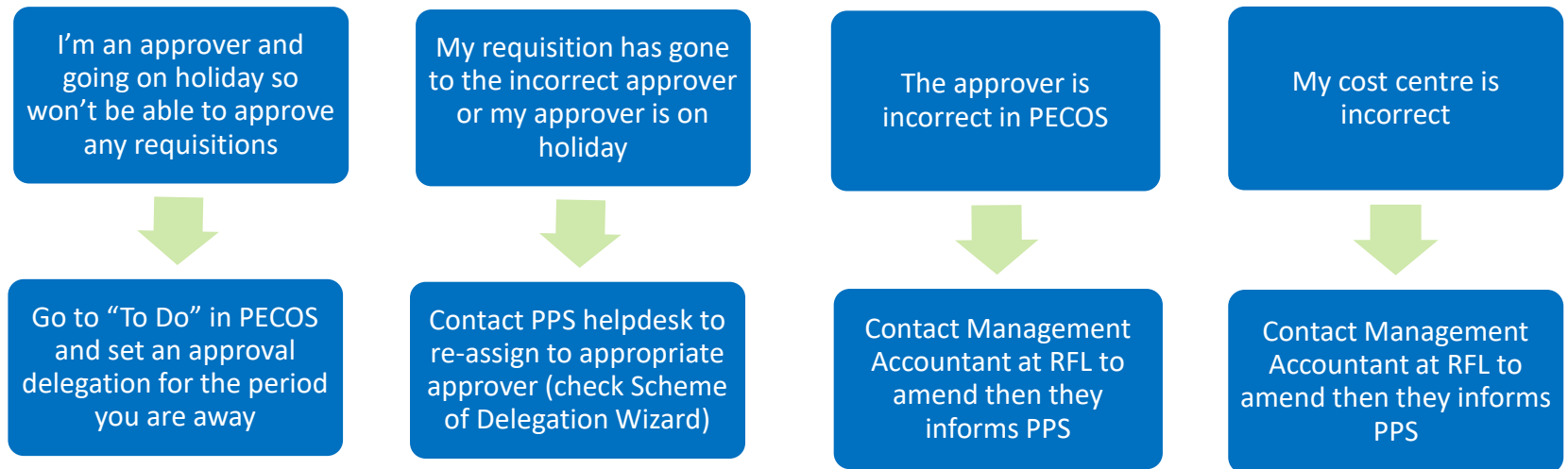
## Services



## Supplier isn't on PECOS



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

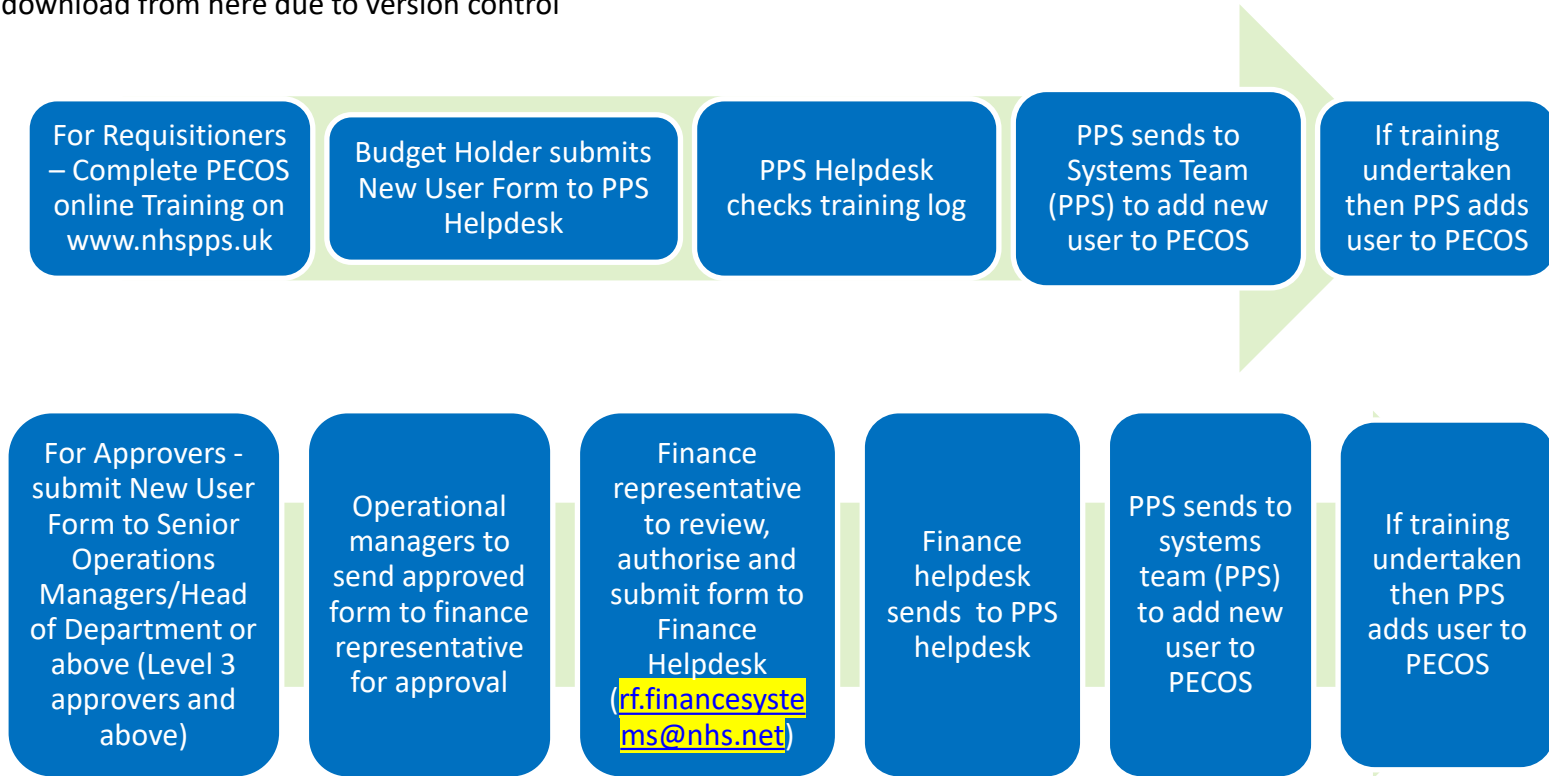




## New User Set up

New User Forms can be found on [www.nhspps.uk](http://www.nhspps.uk) under “About” and “Documents”

Always download from here due to version control



\*Finance Representative - (Deputy Finance Manager, Finance Manager, Business - Analyst, Senior Business Analyst or Director of Financial Performance)

## 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](#)