Midlands and Lancashire Commissioning Support Unit

Care at Home (Merseyside)

Accreditation and Enrolment Guide

Contents

Overview

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

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

Provider

Completes Accreditation

Completes Enrolment

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

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

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

➔ Create an Enrolment

Glossary

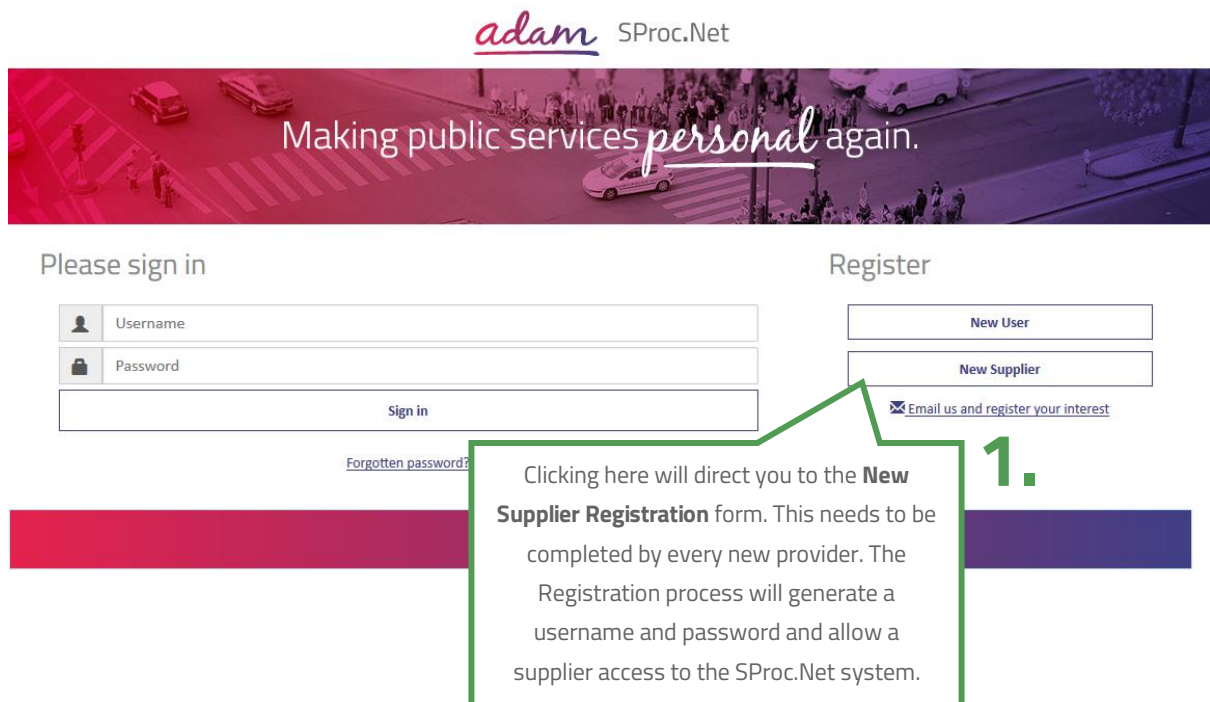|	
New Supplier	A provider who has never used the SProc.Net system before
Supply Category	This is the over-arching service sector/type of service, e.g. 'Care at Home (Merseyside)'
Service Category	The Supply Category is broken down into smaller Service Categories. E.g. ' Care at Home (Merseyside)' can be broken down into 'Learning Disability' or 'Mental Health', etc.
Service Template	Further category breakdown in to the specific service required for an individual
Registration	Process to gain access to SProc.Net
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

Notes:

What is a Supply Category?

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

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

Registration

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

1.   Go to the SProc.Net website: www.SProc.net

2.   The SProc.Net sign in page contains the links to register as a 'New Supplier':

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

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

New Supplier Registration

Step 1 of 2: Business Details

Please complete the form below with your business' information.

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

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

Input your business details as requested.

1 Business Details

Please enter the basic information of your business.

Business Name: *
(❓ Business Name)

Registered Name:
(❓ Registered Business Name)

Website:
(❓ Website Address)

Logo File:
(❓ Logo File)

VAT Registered? *   Yes
(❓ VAT Registered?)

Business Tax/VAT #: *
(❓ Business Tax/VAT #)

How did you learn about Adam? *

1.

2.

Use the drop-down to select responses to the questions asked.

2 Address/ Contact Details

Please enter the address/contact details of your business.

Location Name:
(❓ Business Address Details)

Address 1: *
(❓ Business Address Details)

Address 2:

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

Country: United Kingdom

Telephone Number: *
(❓ Telephone number)

Email Address: *
(❓ Email Address)

Fax Number:

3.

Cancel   Next

Click '**Next**' to continue.

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

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

Enter all user details as asked. These will form a Supplier Administrator profile. This user will initially log in and set up the company profile and thereafter control that company's SProc.Net system.

Click 'Finish' to continue.

6.   Complete registration by clicking 'Finish'

7.   Clicking 'Finish' will take you back to the SProc.Net login page and you will shortly receive an email containing a username and password:
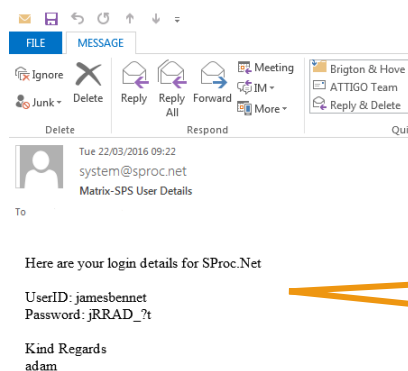
These details will allow access to the SProc.Net system.

8. 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 log in screen

Resetting Your Password

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

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

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

Make sure your new password meets the password criteria specified.

New Password:
Repeat Password:

1. Create a new password.

Cancel   **Reset Password**

Click '**Reset Password**' to complete. **2.**

10. Log in using the given username and your new password and click '**Sign In**'

Accreditation and Enrolment

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

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

Click into the '**Accreditations**' tab on your toolbar

1.

2.

Click into the '**New**' action icon to start a new Accreditation.

2.   Populate the required fields:

1.

The drop down tab will provide a list of all clients who procure services through SProc.Net.

Select '**Midlands and Lancashire Commissioning Support Unt'**

2.

The drop down tab will display the categories the selected client procures through SProc.Net.

Select the category you wish to supply services. For example, '**Care at Home (Merseyside)'.**

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

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

+ Accreditation

− Questions

The following questions must be answered accurately before this Accreditation can be submitted

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

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

Save — Save as you go

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

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

− Upload Optional Documents

If necessary, please upload all of the documents listed below.

Please note that documents can be pulled through automatically from previous up... you should check and confirm each one before submission.

Document Type	File Name	Issue Date	Issue Number	Expiry Date	Description
Parent Company Details					Parent Company Details can be uploaded here.

Save

Cancel   **Next**

3. 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.

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

+ Accreditation

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

1. Click a tick into the box

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

4.

5.

Cancel   **Submit**

Click 'Submit' to continue

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

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

Use the 🔍 icon to bring up the list of locations

1.

Select the correct location you wish to enrol

2.

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

Showing all items.   Cancel

Supplier Location: * Quality Care - Quality Care

Click '**Next**' to continue

3.

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

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

+ Enrolment

– Questions

Please answer all of the questions below

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

Question Type	#	Question	Answer	Characters Remaining
Company Information	1	Has your organisation completed the European Single Procurement Document? Please upload to the space provided on your enrolment.	No	
Grounds for Mandatory Exclusion	2	Regulations 57(1) and (2) Please indicate if, within the past five years you, your organisation or any other person who has powers of representation, decision or control in the organisation been convicted anywhere in the world of any of the offences within the summary below and listed at https://www.gov.uk/government/uploads/system/uploads/attachment_data/file/551130/List_of_Mand - Participation in a criminal organisation	Yes	
Grounds for Mandatory Exclusion	3	Please provide the date of conviction and the reasons for conviction.	-	3999 left
Grounds for Mandatory Exclusion	4	Please provide the identity of who has been convicted.	-	
For Information Only	53	In number of hours, what is your organisations maximum capacity?	-	
For Information Only	54	Of your total capacity, how many hours are currently available?	-	

Save

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

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

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

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

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

11. Upload the required documents:

> Upload the requested documents
> **1.**
> Remember to '**Save**' after you complete each section
> **2.**
> Repeat for the requested 'Optional Documents' where necessary

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

→ A Service Category is the breakdown of the Supply Category into smaller segments

→ At Enrolment, you will stipulate which categories of services you can supply; subsequently you will only be able to make Offers against Requirements relevant to these selections.

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

4.

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

13.   Finally, enter your bank details

5.

To progress your Enrolment click '**Finish**'

Click '**Finish**' to continue

6.

14.   Click '**Submit**' to complete:

Click 'Submit' to complete

7.
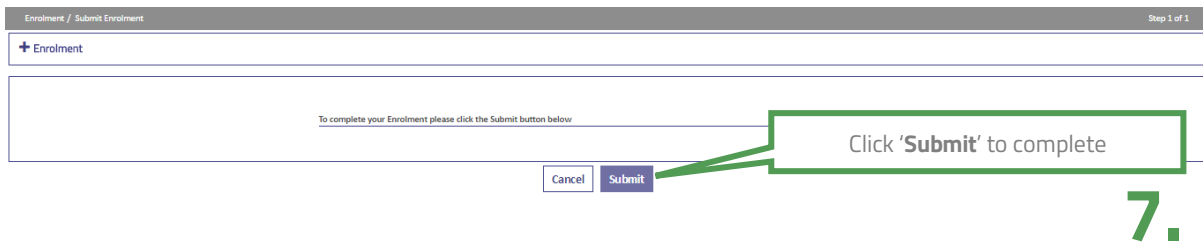
15. The status of the Enrolment will show as submitted:
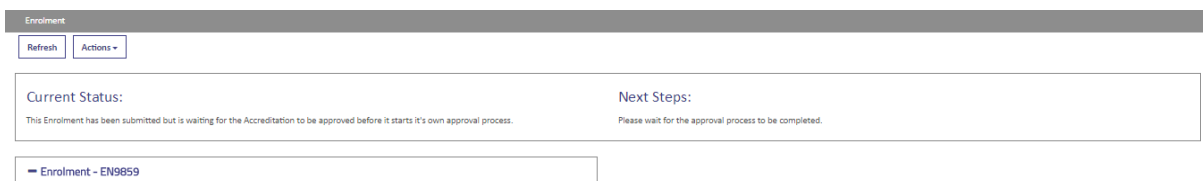
Re-Starting an Enrolment from Draft

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

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

1. Click into your '**Enrolments**' link

2.

Click into your '**Pending**' link

Click the Enrolment you wish to re-start **3.**
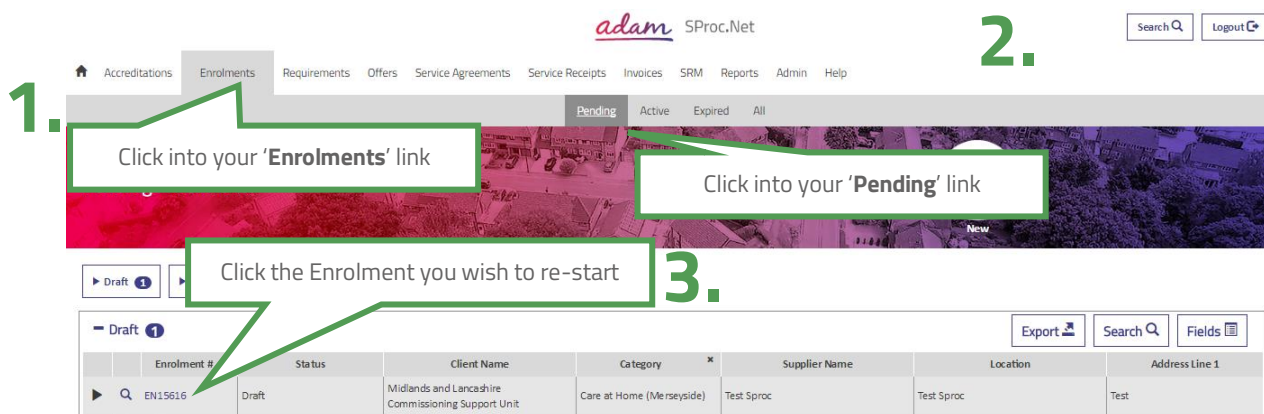
2. The draft progress will show which sections are incomplete

Item is in 'Draft'
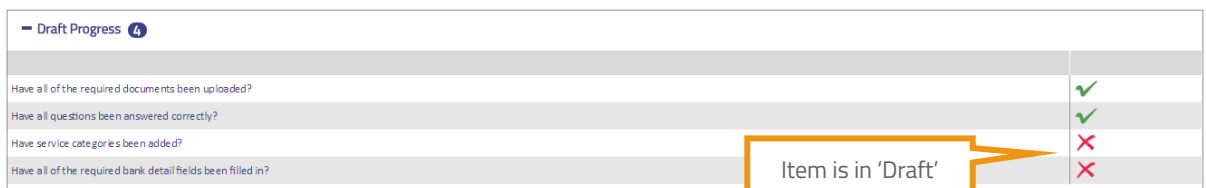
3. From the Enrolment summary page, to edit the information click into the 'Actions' icon:
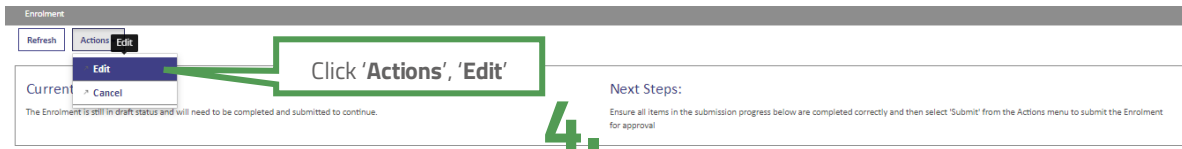
Edit the information as needed, replacing any draft text/characters previously used to save.

4. This process can be repeated as many times as needed, clicking '**Save**' frequently to save your current workings.

5. When complete use the '**Actions**' icon to '**Submit**':
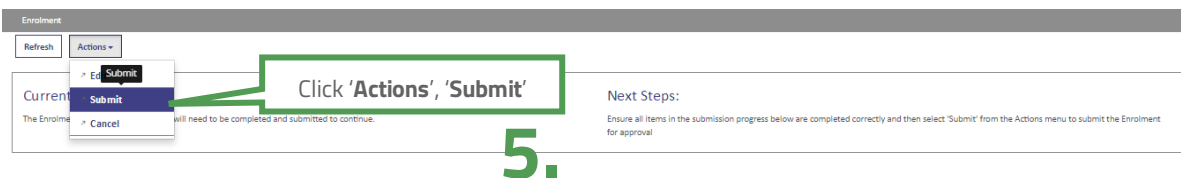
Click '**Submit**' to complete:
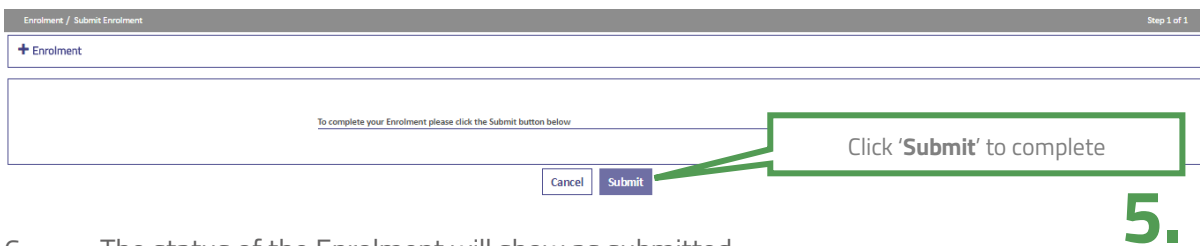
6. The status of the Enrolment will show as submitted:
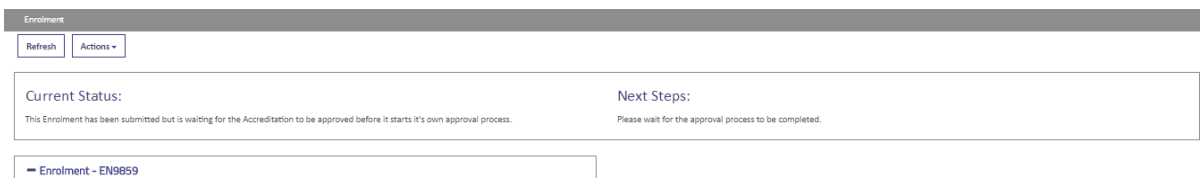
Summary Pages

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

Enrolment Summary:

Review / Approval Process

➔ Once you have completed the Accreditation and Enrolment process it will immediately go to *adam* for review

➔ The submitted Accreditation will be reviewed and approved by *adam*

➔ Then the Enrolment submission will be reviewed and accepted by *adam*

➔ Once *adam* has completed their review, the Enrolment will be sent to the CCGs for approval

➔ If there are any issues with either submission, then the item can be failed by *adam* or the CCGs and you will receive a notification email and will have the opportunity to edit and resubmit the failed item
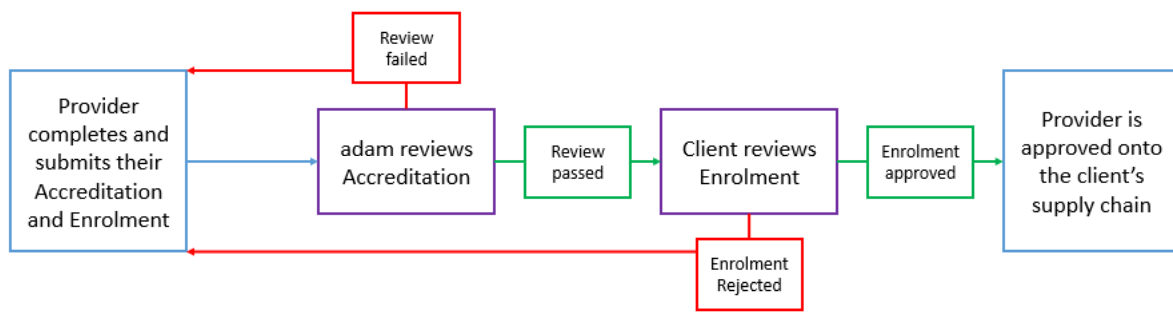
Email Notifications

1.   You will receive an email to inform you if your Accreditation/Enrolment application has been successful or not:
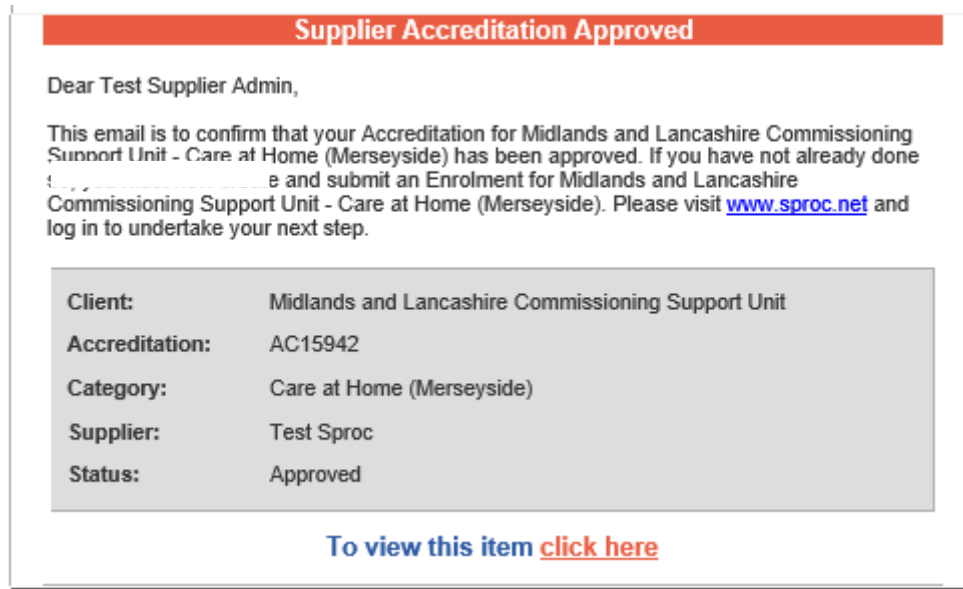
2.   You will see all the details of your Accreditation/Enrolment when you log in to SProc.Net:
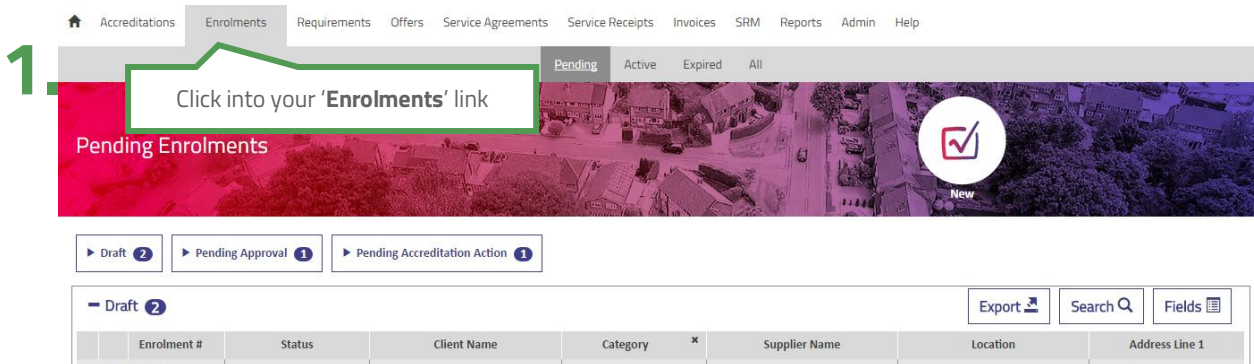
Resubmitting a Failed or Rejected Enrolment

→ The steps below show reviewing and re-sumbitting a failed or rejected Enrolment.

→ The process to review and re-submit a failed Accreditation is exactly the same but starting from the 'Accreditations' tab on your SProc.Net homepage

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

2. This will show you the Enrolment summary page:

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

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

4. From the Enrolment summary page:

5. Update the required information:

Download Documents

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

Review feedback from *adam*

Re-upload Documents

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

Document Type	Old File Name	New File Name	Issue Date	Issue Number
NHS Standard Contract	Blank Document.docx			
Service Provider CQC Registration Certificate.	Blank Document.docx			
Evidence of Insurances	Blank Document.docx		31/01/2017	31/03/2017
European Single Procurement Document				
Financial Documentation	London_Borough_Of_Newham_-_SEND_-_Self-Billing_Agreement_Final_-_Filled 2014.pdf			

Using the upload icon, upload the revised documentation.

1.

Cancel   Finish

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

6. Confirm you agree to the terms and conditions.

To complete your Enrolment please click the Submit button below

Cancel   Save

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

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

Accreditation - South London SEN Commissioning - SEN Education Services

Refresh   Actions ▾

Current Status:
This Accreditation is pending adam review.

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

Accreditation status updated

Creating a New User

➔ Once you have set-up your SProc.Net account, you can create additional users who can access your system and complete steps within the process
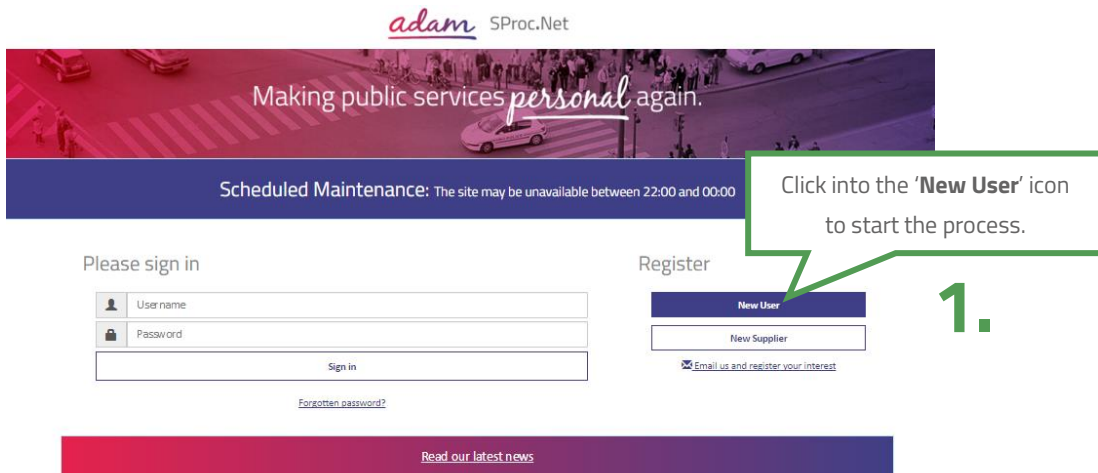
There are two ways a new user can be added:

a)   New user can request to join (user will input their own information and Administrator will approve)

b)   Admin user can add user onto SProc.Net

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

New User Request – Created by the new user

Created by the user:

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

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

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.   View the user's details

Review their details and select their account settings:

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

Role Name	Access	Example
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

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

6.   Accept or decline the new user application:
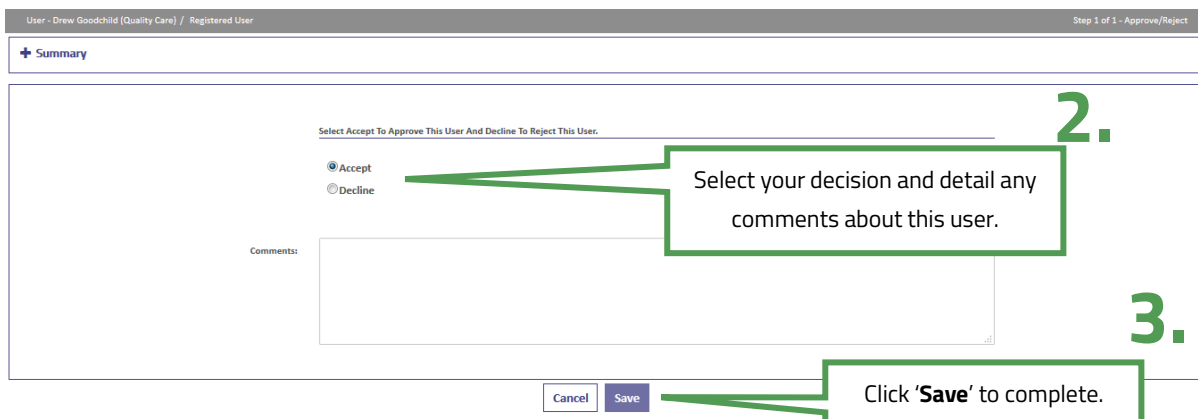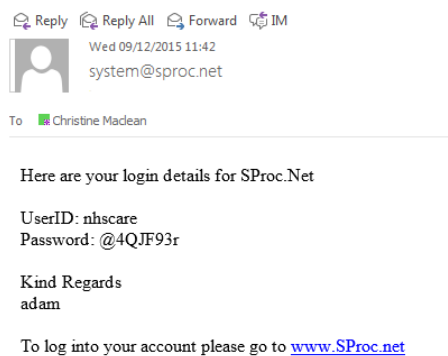

7.   If approved, this process will trigger an email to this new user informing them of their new username and password:

New User Creation – By System Administrator

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

1. Login to your SProc.Net system

2. From your homepage click into the 'Admin' tab on your toolbar

3. Select the 'Users' link

4. Select the 'New' icon

1.

Click '**Admin**' and then '**Users**'

2.

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

5. Complete the user's details and role:

3.

Input the user's details.

4.

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

Click '**Save**' to complete.

5.

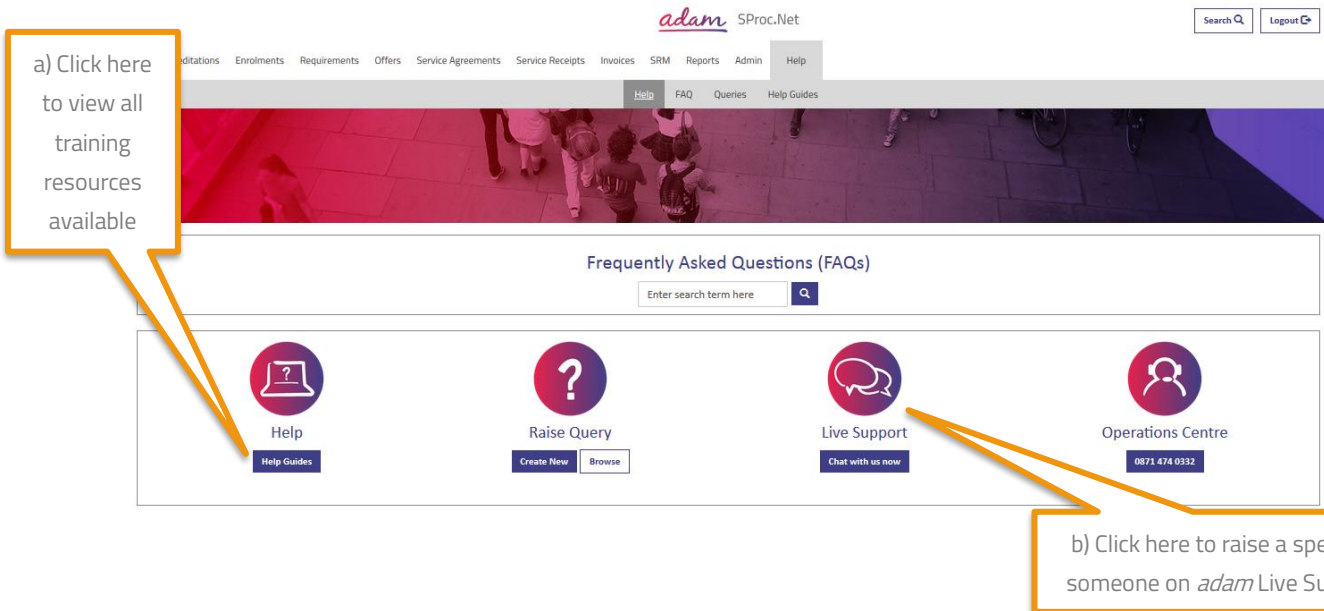See Table 1.0 on page 27 for User Role explanations

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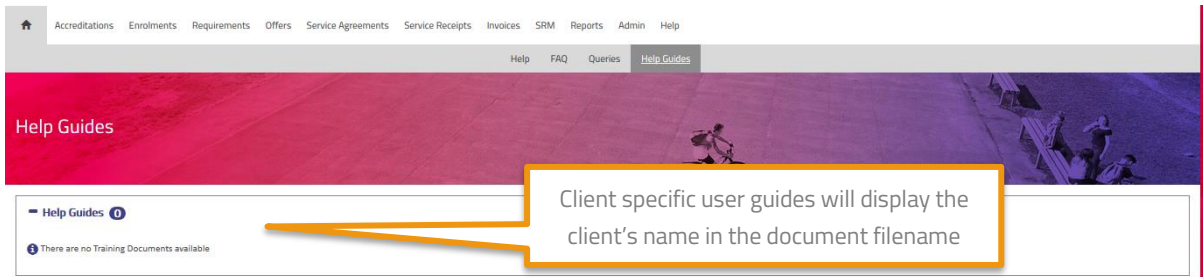
Need More Support?

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

Click into the '**Help**' icon on your homepage to access your system help and support.
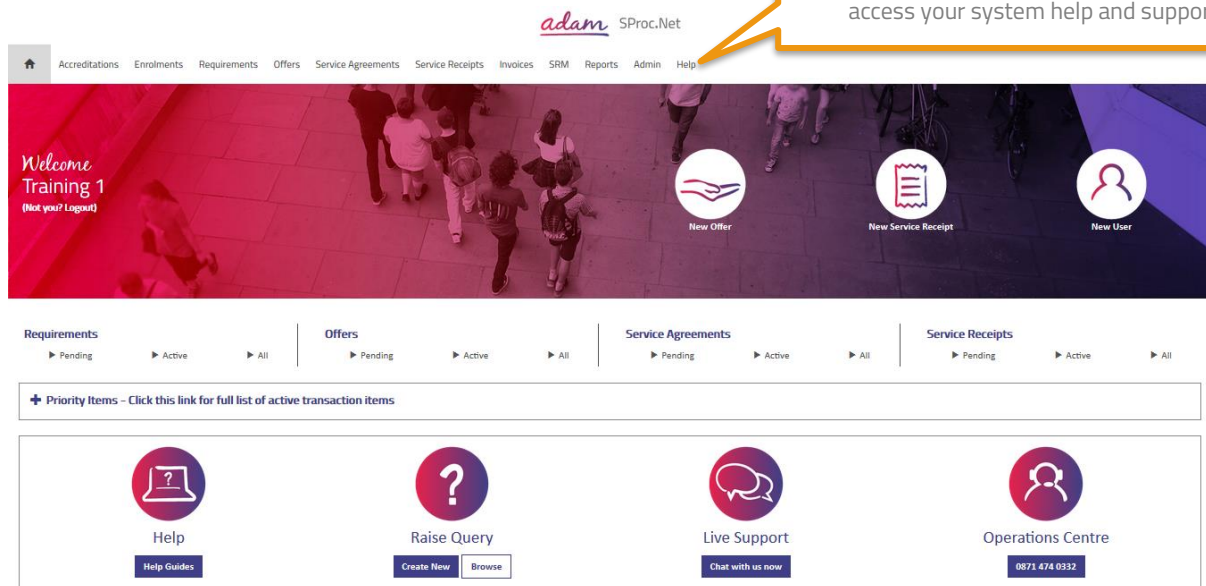
You will be taken to our Help Library where you have a number of different ways of finding the answer to any questions you may have:

a) Click here to view all training resources available

b) Click here to raise a speak to someone on *adam* Live Support

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

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

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

Click '**Chat with us now**' to open the conversation window