

# Basic Introduction to Procurement Guidance, Support & Regulations



Presented by: Keir Warner, Suzyann Pritchard, Lesley Cook, Shannon Mason, Paul Buckingham

# Procurement Services Frontline team

## Procurement Business Partners



### **Non Medical – Facilities, Estates, ICT, Finance, WF&OD**

Suzyann Pritchard, Shannon Mason  
Janet Isaac, Philip Jenkins, Jessie Beavan



### **Omnicell Procurement management and administration**

Sarah McCarthy  
Madison Davies



### **Medical – ACT, Acute Medicine, Insourcing/Outsourcing, Medical Workforce, Pathology, Radiology**

Paul Buckingham, Jack Richardson-Croad  
Derry Scott, Stuart Ubsdell, Danielle Radford



### **Procurement Nurse**

Lesley Cook



### **Primary Care, CHC, Mental Health**

Nicola Craven, Julie Williams  
Andrew Morgan, Angela Tully



### **Logistics and Materials management business partner including Scan4 Safety**

Rhys Davies



### **Senior Management team**

Keir Warner  
Richard Clayfield

# NHS Wales Procurement Services

**National Sourcing (NOM)**

**Scan4Safety**

**Supply Chain & Health Courier Services**

Barcoding, Distribution warehouses, Receipt & Distribution local sites

**Health Courier Services (HCS)**

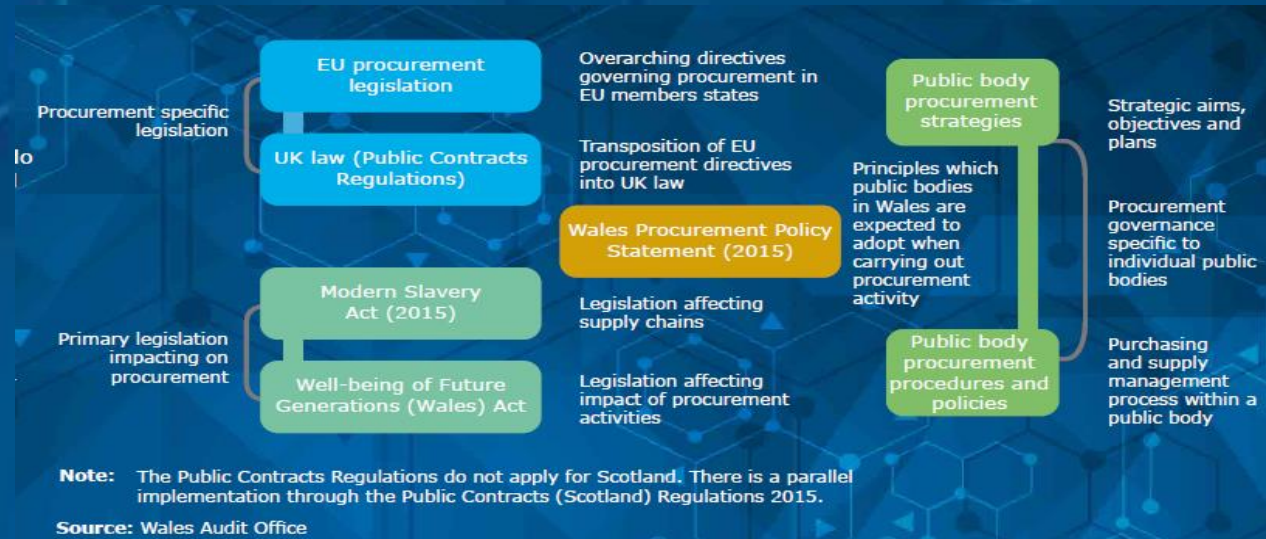
Clinical Logistical support for Primary & unscheduled Care in hospitals, clinical surgeries, GP practices, Pharmacies, schools (immunisation programmes)

**Surgical Materials Testing Laboratory (SMTL)**



# Compliance, Roles and Responsibilities

## Legal & Compliance Framework



## Roles and Responsibilities



**End User** – Speak to your procurement Team and inform them of the following:  
Describe what you need, confirm you have the money, advise when you need it by and any known potential suppliers.



**Procurement:** Discuss options and best approach to buy, support you through the tender documentation, advise of how to compare offers, discuss options of how to get best value for money, run the procurement, award the business.



**Joint Responsibilities:** Market Research, Evaluate offers, Manage the contract Throughout (Cradle to Grave process)



# What to consider when a purchase is required?

## Planning Checklist

- Is this a priority for your organisation?
- Considered the Wellbeing and Future Generations 7 Objectives.
- Checked if there are Welsh Language Implications.
- Who should be involved internally.
- Are there any external influences.
- Check resources are available to support the preferred timescales.
- Consulted with your Finance Business Partner.
- Checked if a Business Case is required.
- Consulted with Procurement Service.

▪ Refer to Page 20 - 34 of the Procurement Manual for further information.

## Competition requirements

Goods / Services / Works – Whole Life Cost Contract Value (Excluding VAT)	Minimum Competition (Subject to the existence of suitable suppliers)	Timescales (Excluding planning, preparation, and implementation)	Contract Form
➤ <b>£5,000</b>	Evidence of value for money	1-5 Working Days	Purchase Order
➤ <b>£5,000 to £25,000</b>	Quotation exercise Through Procurement	1-4 Weeks	Simple form of contract / purchase order
➤ <b>£25,001 – OJEU Threshold</b>	Openly advertised call for competition through Procurement	Minimum 4 weeks, maximum 6 Months	Formal contract and Purchase order
➤ <b>Above OJEU Threshold</b>	Openly advertised call for competition through Procurement	Minimum 4 months, maximum 12-18 Months	Formal contract and Purchase order

# Procure to Pay Process (P2P)

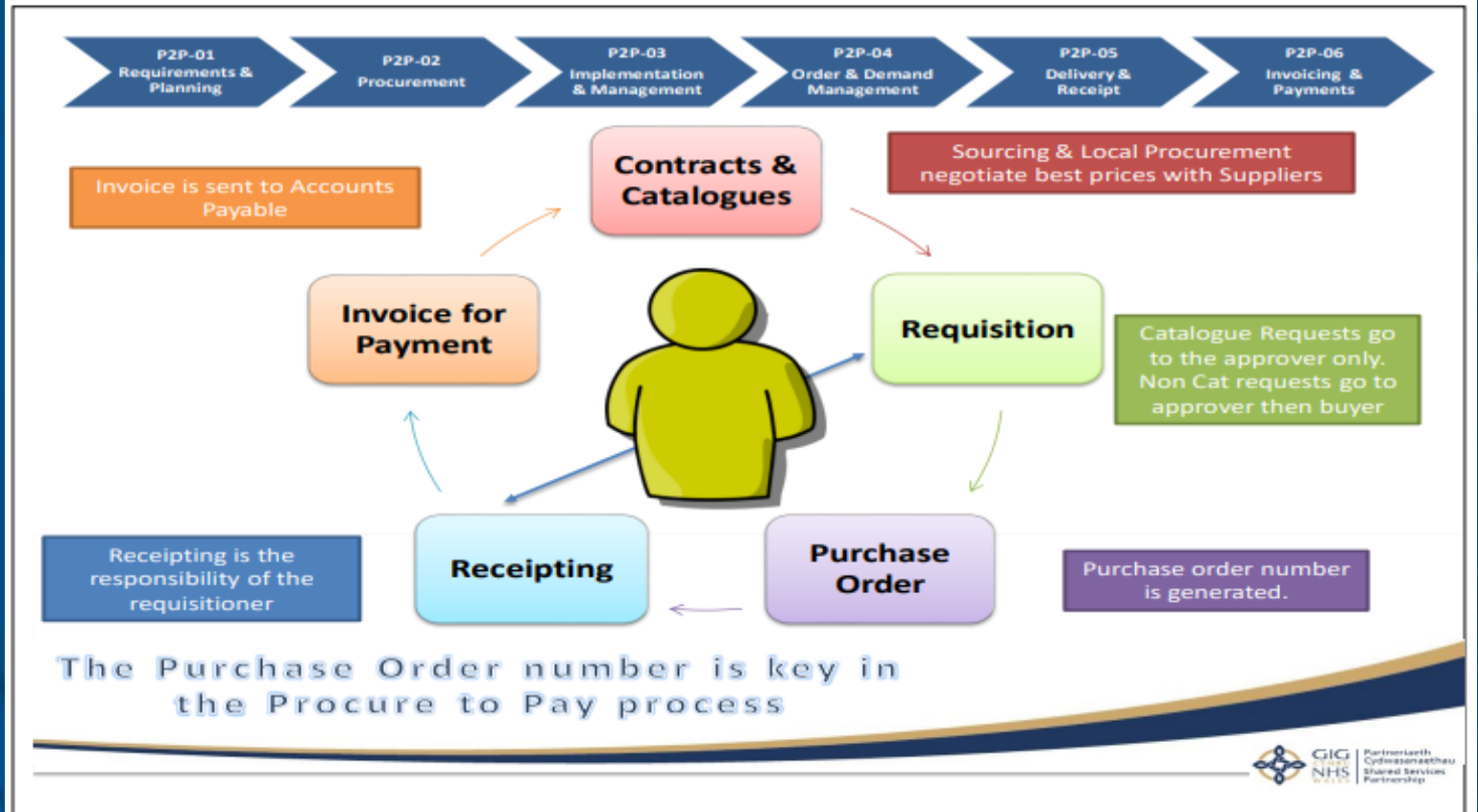
The P2P - the Procure to Pay process – encompasses the end to end process from sourcing goods and services through to delivery and receipt of goods and payment to the supplier

## Purpose

All non-pay expenditure incurred by SBU is appropriately authorised in advance of the goods/services being received.

The National NHS Wales policy of 'No Purchase Order/No Pay' ensures that NHS Wales only pays for goods and services which have been properly ordered and authorised in accordance with the NHS Wales Procurement rules and SBU Standing Financial Instructions.

## Procure to Pay Process

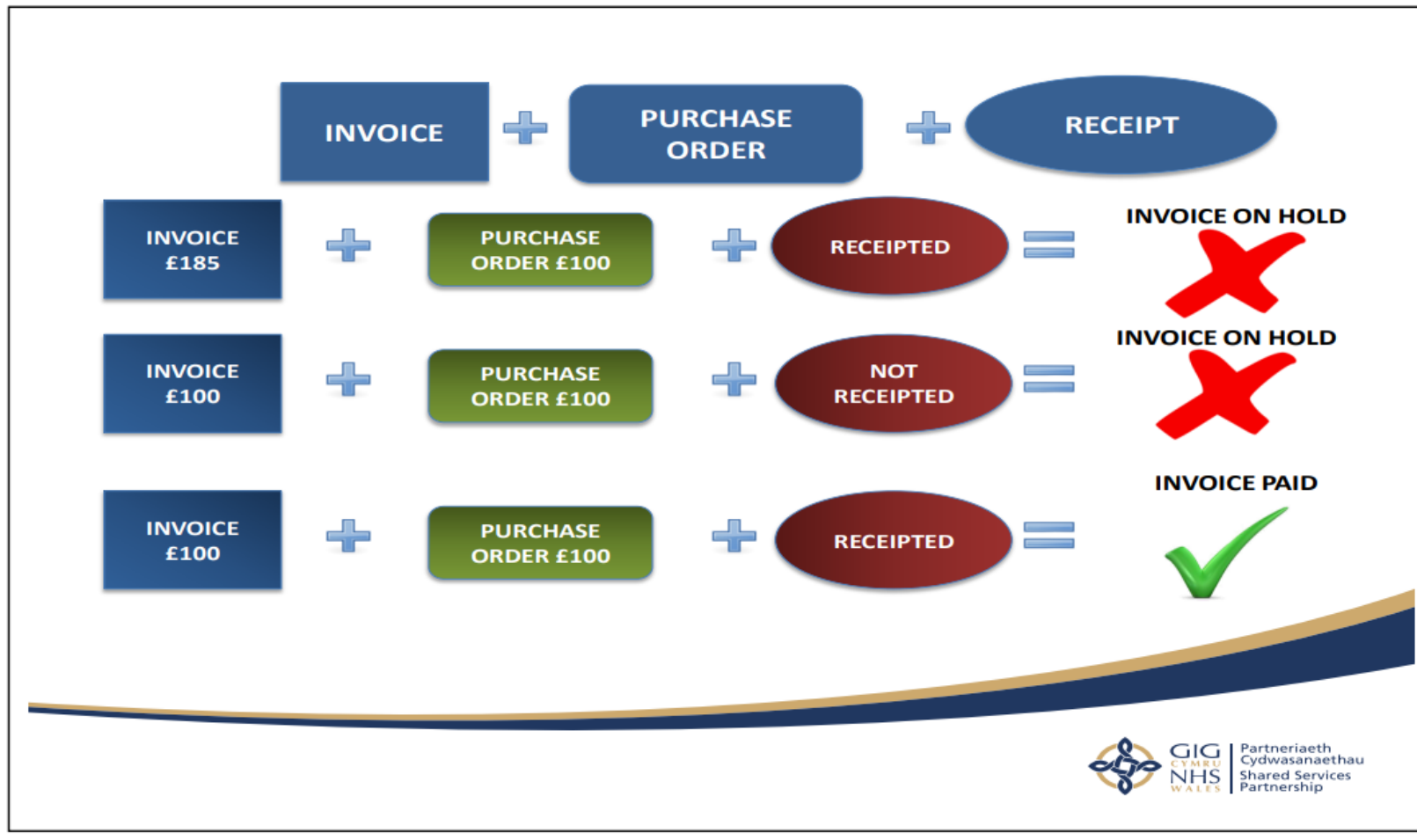




# Procure to Pay Process (P2P)

All staff that work in receipting and distribution points and local departments where goods or services are delivered too are responsible to receipt as soon as possible within the Oracle system but no later than within 2 working days of the delivery of goods or provision of the service

## 3 Way Match



# Key Issues and Consequences

- Correct route to procurement
- Delays in approval of requisitions
- Goods & Services being asked for outside Oracle – without a Purchase Order
- Invoices being sent directly to end user not to Accounts Payable
- No PO on Invoices
- Duplicate Invoices
- Goods & Services not receipted



- Quotations & Tenders or STA & SQA
- Delays in ordering goods & services
- Issue with invoice payment, budgets not accounted
- NO Payment
- NO Supply – supplier not providing goods
- Impact on service delivery and other departments
- Retrospective action

## Governance & Reporting



Public Sector Prompt Payment – Target 95% of Invoices paid within 30 days



Audit Committee



# What further guidance and training is available?



NHS Wales Procurement Services in conjunction with NHS Wales Finance Academy developed the All Wales Procure to Pay e-manual. A practical step by step guidance document on securing goods/services/works on behalf of their organisation



Embedded within the Document is the Purchasing compliant guide taking you through the transactional P2P process



Oracle training is also available via <http://www.sharedservicespartnership.wales.nhs.uk/training-oracle-iprocurement>

Guidance documents available via <http://www.sharedservicespartnership.wales.nhs.uk/sitesplus/documents/955/Procurement%20Manual%202021%20v15.pdf>  
<http://www.fsd.wales.nhs.uk/sitesplus/documents/1084/Purchasing%20Compliance%20Guide.pdf>

For any specific training requirements on the key components of the Procurement Cycle contact your Procurement Business Partners in the first instance.

# Role and responsibilities of the procurement nurse

The role is varied and I am heavily involved in attending All Wales contract meetings for a whole host of consumable items, from surgeons gloves to IV cannula to pulp products. That makes up only part of my role however...

- I work closely with colleagues at the Supply Chain (Bridgend Stores) and undertake ward stock review to ensure the wards have the required consumables to provide safe care to the patients and have been working on a S4S project for some time now
- I am used as a clinical resource by my colleagues in the frontline procurement team
- I am used as a resource by HB and procurement sourcing colleagues requiring product advice

# Role and responsibilities of the procurement nurse

- I was heavily involved with PPE during Covid and deputised for Mark Parsons in the HB wide bronze PPE meetings
- I am committed to working towards achieving value based procurement, so that the patient has the best treatment/product possible for them at the time
- I am the first point of contact for medical reps trying to influence the HB to purchase their products
- I represent frontline procurement at a variety of HB meetings, such as Safer Sharps Group, Medical Devices Committee and Emergency Planning Resilience and Response to name a few.
- I am the Defect Reporting Officer (DRO) for the HB.
- I receive Datix email alerts if an incident is reported which has involves a consumable item or equipment.



# Q&A

