

New Product Request Form

Issue Date	Review Date	Version
September 2020	September 2025	1

Purpose

Provide a method and process for end users to raise requests to add new products into the online catalogue in a timely and robust manner

Who should read this document?

End Users, Service Line leads, Procurement team

Key Messages

The SOP is designed to give a written guide for each of the 3 departments involved in the New Product Request (NPR) process.

Please ensure you have Macro's enabled, or select enable if prompted to allow this form to work effectively

This SOP details how the automation side works, and who owns which stage of the process flow.

Core accountabilities		
Owner	Senior Data Analyst Procurement	
Review	Head of Supply Chain and e-Procurement	
Ratification	Director of Finance & Finance Senior Management Team Meeting	
Dissemination (Raising Awareness)	Head of Supply Chain and e-Procurement	
Compliance	Head of Supply Chain and e-Procurement	
Links to other policies and procedures		
Version History		
1	September 2020	Ratified by Head of Supply Chain on behalf of Director of Finance and published Trust-wide

The Trust is committed to creating a fully inclusive and accessible service. Making equality and diversity an integral part of the business will enable us to enhance the services we deliver and better meet the needs of patients and staff. We will treat people with dignity and respect, promote equality and diversity and eliminate all forms of discrimination, regardless of (but not limited to) age, disability, gender reassignment, race, religion or belief, sex, sexual orientation, marriage/civil partnership and pregnancy/maternity.

**An electronic version of this document is available on Trust Documents.
Larger text, Braille and Audio versions can be made available upon request.**

Standard Operating Procedures are designed to promote consistency in delivery, to the required quality standards, across the Trust. They should be regarded as a key element of the training provision for staff to help them to deliver their roles and responsibilities.

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Standard Operating Procedure (SOP)

New Product Request Form

1 Introduction

The SOP is designed to enable any end user within the trust to raise a request for a new product with approval of their service line manager.

2 Definitions

- NPRF – New Product request Form

3 Regulatory Background

4 Key Duties

- End User – The raising of the form, ensuring the form is complete before sending through to the helpdesk. This is now visibly flagged allowing the user to know when they have fully completed the form. The end user should also ensure they are selecting the correct category and sub category of the product to ensure the correct buyer is assigned to the product
- Buyer – Approval of the request, completion of section C of the NPRF and updating of the master log when approved / rejected. Contacting end user / Service Line authoriser regarding approval or rejection
- Helpdesk – Save a copy of the original email into the “In process” folder, using the form assign a log number and process emails to end user and buyer (automated process). File email into completed section of inbox. Once buyer approval has been given, enter item into online catalogue system and email confirmation to end user.

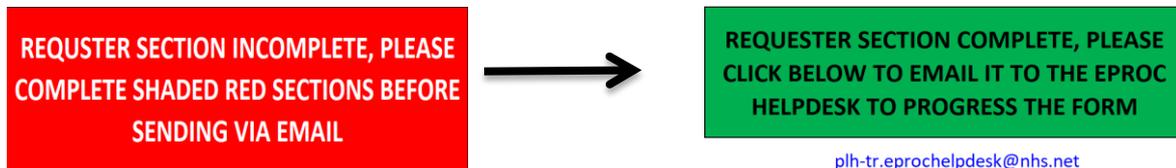
5 Procedure to Follow

Stage 1: End User

The End User should complete the NPRF using the dropdown and free-type fields highlighted pink where they want to request the setting up of an item that is currently not available to order. The end user should ensure Macro's are enabled – or select “Enable” when prompted within Excel to allow this form to work correctly.

The End User needs to complete Section A of the form as mandatory, and Section B of the form only where the new product being requested is NOT a previously ordered item (including Non Catalogue orders), or an addition to an existing range.

Once the user has satisfactorily completed the fields they need to complete, the instruction box on the right hand side will turn from red to green (as shown below), giving the user the email address of whom they need to send the form to. They should save the form and attach it to the email along with any other relevant correspondence they feel may be useful (quotations etc).



Stage 2: eProc Helpdesk

Any incomplete forms, or forms relating to items already on the system, will be returned to the End User by the eProc Helpdesk as un-processable and filed in the “Rejected” folder.

They will then assign the new item an item reference ID number and add the item to the master log. This is an automated process and can be done by clicking the “Add item to Master and Send email” button contained within the “Eproc Use Only” tab. As stated this tab should **ONLY** be used by a member of the Eproc Team.

Clicking this button will save the file name as the ID number automatically in the “In process folder” and will also send an automated email to the automatically assigned Buyer, advising them that a new item has been added to the Master List and the assigned ID number. The form will also be attached to the email. This will alert the buyer to look at this request for approval.

There will also be an automated email created simultaneously which will be sent back to the End User advising them of the ID number assigned to their new product request – and the Buyer who is handling the approval/rejection of their NPR.

*Please note, the eProc team member must have their outlook email application open for this to work, the email will be sent from their personal address.

Once a completed form has been received, the eProc Helpdesk team will manually save the email from the End User containing the attachment(s) into the “In process” folder on the G:drive and use the ID number to help the Buyer to identify the relevant NPR and its attachments (if applicable) by saving it like the below:

📧 FW Scan-to-Me (Sent to KH - 2483) 07/05/2020 18:37 Outlook Item 709 KB

The original email from the End User can be filed as completed within the eProc Inbox under the NPRF Folder.

Stage 3: Buyer

The Buyer should pick up this request from the automated Eproc email, locate the email and any attachments (including the form) from the “In process” folder and complete section C.

If the Buyer deems the product is to be rejected, they will email the End User with comments and update the Master File to state rejected.

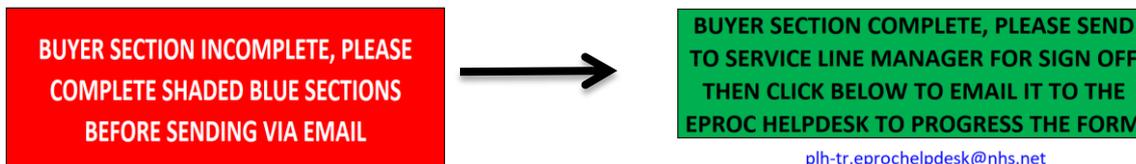
If the product is to be approved, and if the product is not contracted – the first 7 sections will be blanked out and do not need completing, otherwise these should be filled out.

The Buyer will be guided as to what they need to fill out by the shaded blue fields. Some of these will already be populated by the End User automatically, but the Buyer has the option to overwrite

these (Supplier Name, product code, product description, Item price and Eclass will auto populate once the End User successfully completes their part of the form).

The Buyer should complete all sections indicated - the only optional one is “Does (NEW) Supplier have insurance / IFA Number”, the rest are mandatory and similarly to above, once fully complete the message box will turn from Red to Green as shown below. The buyer should contact the Service Line Manager / Business Advisor and send to eProc for uploading into the system.

The Buyer should then amend the Master File to advise that the ID has been closed.



Stage 4: eProc Helpdesk

The eProc team will then copy the email(s) into the completed folder, enter the item into the system and manually email the End User to confirm the item is ready to order using the existing reference ID number.

Please see appendix for workflow.

6 Document Ratification Process

The design and process of review and revision of this procedural document will comply with The Development and Management of Formal Documents.

The review period for this document is set as default of five years from the date it was last ratified, or earlier if developments within or external to the Trust indicate the need for a significant revision to the procedures described.

This document will be reviewed by the Finance Senior Management Team Meeting and ratified by the Director of Finance.

Non-significant amendments to this document may be made, under delegated authority from the Director of Finance, by the nominated author. These must be ratified by the Director of Finance and should be reported, retrospectively, to the Finance Senior Management Team Meeting.

Significant reviews and revisions to this document will include a consultation with named groups, or grades across the Trust. For non-significant amendments, informal consultation will be restricted to named groups, or grades who are directly affected by the proposed changes.

7 Dissemination and Implementation

Following approval and ratification, this procedural document will be published in the Trust's formal documents library and all staff will be notified through the Trust's normal notification process.

Document control arrangements will be in accordance with The Development and Management of Formal Documents.

The document author(s) will be responsible for agreeing the training requirements associated with the newly ratified document with the Director of Finance and for

working with the Trust's training function, if required, to arrange for the required training to be delivered.

8 Monitoring and Assurance

- The form has been trialled, but will need constant monitoring and amending based on user feedback and improvement opportunities.
- Main responsibility for monitoring will lay with the Senior Data Analyst, and the Data Analyst within the procurement team
- Monitoring will be on going and ad hoc with collation of feedback from end users, eProc helpdesk team and buyers.
- The form or process will be checked and reviewed, any amendments will be made and a new issue of the form raised.
- A new form will be circulated with a new revision and explanation of changes
- Circulation of revised forms will be through daily email, and direct to line leaders.
- Learning will take place from feedback from users, after all it was their feedback that enabled us to create this improved version

9 Reference Material

<https://www.youtube.com/watch?v=d1gqIYC-kqQ>

G:\ContractInformation\NPR – Revenue

HELPDESK – NPRF



EMAIL RECEIVED TO THE HELPDESK INBOX



HELPDESK WILL SAVE A COPY OF THE EMAIL AND ATTACHMENT TO THE "IN PROCESS" FOLDER WITHIN THE ABOVE LINK, AN AUTOMATIC LOG WILL BE MADE ON THE MASTER FILE AND IDNUMBER ASSIGNED.

AN AUTOMATIC EMAIL IS SENT TO THE RELEVANT BUYER ADVISING TO CHECK THE MASTER FILE, AND AN AUTOMATED EMAIL SENT TO THE END USER ADVISING THE ID REF NUMBER



THE HELPDESK CAN THEN DRAG THE EMAIL TO THE COMPLETED FOLDER IN THE INBOX

BUYER - NPRF



CHECK NPRF MASTER FILE AND OPEN THE EMAIL FROM THE FOLDER ON THE G;DRIVE



ADDITION



CHECK WITH SLA/ BA FOR SIGN OFF,
EMAIL EPROC TO ADD PRODUCT TO



UPDATE SPREADSHEET TO CLOSE QUERY
QUERY



REJECTION



EMAIL END USER WITH COMMENTS
REJECT



UPDATE SPREADSHEET TO CLOSE

HELPDESK – NPRF



EMAIL RECEIVED FROM BUYER TO APPROVE ITEM



ENTER ITEM INTO ONLINE CATALOGUE SYSTEM



MANUALLY EMAIL END USER WITH ID REF TO ADVISE THE ITEM IS NOW LIVE AND AVAILABLE