

NHS Supply2Health: Contributor Summary

To sign in to NHS Supply2Health	To draft contract award details or AWPP designations
<ol style="list-style-type: none"> 1. Either access the website at: www.supply2health.nhs.uk or via the link in the email notification from the approver informing you that an advertisement or award notice has been rejected. 2. Sign in by entering your user name and password (these will have been provided to you by either your lead user or Supply2Health administrators) and clicking the Sign in button. 3. If this is the first time you have signed in: the NHS Supply2Health terms & conditions must be accepted before you can continue. Click the check box at the bottom of the screen. You may have to scroll down to see it. 4. Click on My Home on the left hand side of the screen to go to your home page 5. If you have access to more than 1 commissioner site (because you work in a collaborative organisation, for example), click on All Available Sites on the left hand side of the screen and select the relevant site from the list provided on the main part of the screen 	<ol style="list-style-type: none"> 1. Sign in (see section 'To sign in to NHS Supply2Health') 2. On the Lists menu, select Contract award details or AWPP designation (as appropriate) and click New 3. Enter the information in the various fields. Mandatory fields must be completed, including Related advertisement/notice– to create either of these you must first have placed an advertisement on NHS Supply2Health 4. Click OK to save 5. To submit for approval, click Send for approval at the top of the page. The item will now have its approval status (bottom of page) shown as Pending. 6. You will receive an email from the approver notifying you if the award is approved or rejected. 7. To log out of the website, click on welcome box at top RH corner of screen and click Sign out
To draft contract award details or AWPP designations	To edit an existing form
<ol style="list-style-type: none"> 1. Sign in (see section 'To sign in to NHS Supply2Health') 2. On the Lists menu, select Contract award details or AWPP designation (as appropriate) and click New 3. Enter the information in the various fields. Mandatory fields must be completed, including Related advertisement/notice– to create either of these you must first have placed an advertisement on NHS Supply2Health 4. Click OK to save 5. To submit for approval, click Send for approval at the top of the page. The item will now have its approval status (bottom of page) shown as Pending. 6. You will receive an email from the approver notifying you if the award is approved or rejected. 7. To log out of the website, click on welcome box at top RH corner of screen and click Sign out 	<ol style="list-style-type: none"> 1. Sign in (see section 'To sign in to NHS Supply2Health') 2. On the Lists menu, select the appropriate item 3. Select the item you wish to edit. 4. Select Edit item from the menu at the top of the page 5. Make the required changes and click OK to save 6. To submit for approval, click Send for approval at the top of the page. The item will now have its approval status (bottom of page) shown as Pending. You will receive an email confirming that approval has been sought. 7. To log out of the website, click on welcome box at top RH corner of screen and click Sign out

NHS Supply2Health: Lead User Summary

To create a new user	To remove user(s) from a group
<ol style="list-style-type: none"> Sign in (see section 'To sign in to NHS Supply2Health') On the Manage Security menu, select Create user Enter name, user name, password and email address of the new user Check the relevant box according to whether you are setting the new user up as a: <ul style="list-style-type: none"> Lead user contributor approver The message "Account has been successfully created" appears To log out of the website, click on welcome box at top RH corner of screen and click Sign out 	<ol style="list-style-type: none"> Sign in (see section 'To sign in to NHS Supply2Health') On the Manage Security menu, select the category of the user that you wish to remove (eg Contributor) Check the box(es) against the name of the person(s) you wish to remove and click actions Click Remove user from group Click OK To log out of the website, click on welcome box at top RH corner of screen and click sign out <p>Note: users cannot be deleted from Supply2Health; their user rights are simply removed. Remember to do this if a user leaves your PCT.</p>
To add a user to a group (where person is an existing user ie already on NHS Supply2Health)	To change a user's role
<ol style="list-style-type: none"> Sign in (see section 'To sign in to NHS Supply2Health') On the Manage Security menu, select the category of the user(s) that you wish to add to a group (eg Contributor) Click New and enter name (as it already appears on the system – either actual name or user name) in the Users/Groups box. Click on the Check names icon at bottom RHS of the users/groups box. The name should now appear underlined. (If it appears with a red wavy underline, and the message no exact match found this indicates that the system does not recognise the name – right click on it and a list of possible options will appear.) The Send email option allows you to send a message to the new user(s) Click OK To log out of the website, click on welcome box at top RH corner of screen and click Sign out 	<p>To do this, first (i) remove the user from the group s/he is in and then (ii) add the user to another group</p>
	Status of Documents
	<p>If a document is shown in the tasks list as pending, this means that it awaiting something to happen to it. This could be because:</p> <ul style="list-style-type: none"> It has been saved, but not yet sent for approval It has not yet been approved or rejected by an approver <p>Changing advertisement status:</p> <ul style="list-style-type: none"> Once the reply by date is exceeded, status will change automatically to closed If the procurement has not been completed, contributors should edit document to change its status to "not awarded", and send it for approval. Once approved, the status will be updated on www.supply2health.nhs.uk

NHS Supply2Health: Approver Summary

To view, approve or reject a draft advertisement or contract details

1. **Sign in** (see section 'To sign in to NHS Supply2Health')
 2. If you have been set up on more than one site (eg if you work in a collaborative procurement organisation), select the site you wish to work on.
 3. On the **Lists** menu, select **Tasks**. A list of all the available tasks (ie the pending advertisements and awards) will come up.
 4. Click on the task that you wish to work on
 5. Check the **Claim task** box to let other users know that you are working on this task. This will "lock" the task.
- Note:** You only need to do this if you (i) do not intend to work on the task immediately and (ii) wish to prevent anyone else working on the task in the meantime. To release a task, click on the task and check the **Release task** box.
6. To view the form that has been sent to you for approval, click on the **contract title** in the workflow task box. The form opens in another window. You cannot save changes to this form and you should close this window to return to the task when you are finished.
 7. To approve the document for publication, click **Approve**. **Note:** This will immediately place the document on the world wide web and send an email notification to the contributor.
 8. When you have finished reviewing the document, you may either approve or reject it (you cannot edit it)
 9. To reject the document and send it back to the contributor for amendment, complete the **comment box** detailing the changes that you want made and click **Reject**. An email will then be sent to the contributor.

10. The status of the document will now be shown in the tasks list as **rejected**
11. To log out of the website, click on welcome box at top RH corner of screen and click **Sign out**

Editing published documents

To edit a published document, a contributor should make the required changes and re-send it for approval. Once approved, the existing document will be overwritten with the new version. **Fresh alerts will be generated.**

Note:

- A published document may be edited **only** if it is more than 14 days before the "reply by" date **and** if the OJEU reference field has been left blank
- Only contributors can edit documents

Deleting documents & version control

Once saved, **a document cannot be deleted** – but it can be edited/overwritten

Advertisements: Any changes made to an approved document must be

- done by a contributor
- saved
- sent for approval (and approved)

Award notices can only be linked to approved and closed advertisements (therefore, avoid changing/editing advertisements after they are closed).

Accessing NHS Supply2Health	Display names, Passwords & User names
<ul style="list-style-type: none"> Public site (internet): www.supply2health.nhs.uk Secure site (intranet): nww.supply2health.nhs.uk Can only access the secure site from an NHS email address 	<ol style="list-style-type: none"> To change a password or display name: log in, then click on account settings (LHS of screen). Click Change Display Name or Change Password and enter current and new password/display name. Click OK Forgotten passwords: sign in using user name, then use the forgotten password link to generate a new one (it will be emailed to the address the user has on the system) User name format: first name.lastname <p>Note:</p> <ul style="list-style-type: none"> Passwords and user names do not expire Only passwords are case sensitive User names cannot be changed <p>Passwords/user names on nww.supply2health.nhs.uk cannot be used on www.supply2health.nhs.uk and vice versa</p>

NHS Supply2Health Key Roles

Task	No*	Governance	Notes
Lead User Setting up and training users on the system	2	May carry out both lead user and contributor tasks	One of the Lead Users should have responsibility for the overall management of NHS Supply2Health locally. Need not be an IT person
Contributor Drafts text of the tender advertisement and/or notice of tender award Amends and re-submits text if rejected by Approver	2+	May not be an Approver	May carry out both lead user and creator tasks The number of contributors needed depends on the size and distribution of responsibilities within your organisation
Approver Authorises publication of the text drafted by the contributor (advertisement and/or tender award)	2+	Has necessary authority within PCT (as recognised in SFIs) to sign off tender advertisements and awards May not be a contributor	The number of approvers needed depends on the size and distribution of responsibilities within your organisation

Titles and Advertisements

Titles	Ad content
<p>Most providers sign up to receive e-mail alerts rather than search the site every day. Alerts show only brief details including the title and weblink so it is important that titles are succinct and clear otherwise your ad may be overlooked. A good title should:</p> <ul style="list-style-type: none"> be short provide a focussed description use keywords that will aid searches highlight the key service by putting it at the start avoid abbreviations or acronyms <p>Ideally:</p> <ul style="list-style-type: none"> avoid phrases such as using "Provision of" repeating items or aspects that are covered in detail elsewhere in the form 	<p>Feedback from providers indicates that it is important to make it easy for potential bidders to see what is being offered. Using the service description box to give a succinct description of the service being tendered is recommended. The type of information providers need to help them decide whether to look further includes:</p> <ul style="list-style-type: none"> Exactly what is being tendered By whom Population being served (size, type & geographical spread) Location of service and any specific premises requirements Start date, duration and details, of any roll-over clauses Other key factors – TUPE Further information Next Steps (with sufficient response times)

* this is minimum number needed to run NHS Supply2Health within a PCT/collaborative hub