

COVID-19 Supplier Support Portal

User guide

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Introduction

Welcome to the Supplier Support Portal!

This portal has been created to unify the PPE procurement processes from the point at which they offer support through to closure and procurement of Personal Protective Equipment (PPE).

What is this system for?

- Tracking of PPE procurement workflow from Opportunity through to POs being raised
- For evidencing approvals
- To improve security, and ensure there is appropriate segregation of duties across the procurement process.
- To improve the efficiency of handover across teams
- To improve the speed and accuracy of reporting.

The system is not:

- A full replacement for all of our current processes.
- A fully fledged documentation tool.

Please note that the information contained within the screen captures in this document is fictitious.

Access to the system

Requesting access

- To request access to the system please send an email to covid19mendixsupport@cabinetoffice.gov.uk
- The email must be sent from a government email address rather than a personal email address
- State the role you are performing (Opportunity team, Technical team, Closing Team or Due Diligence) in the subject
- Copy your team lead/manager in the email
- No further information is required in the body of the email

Logging in

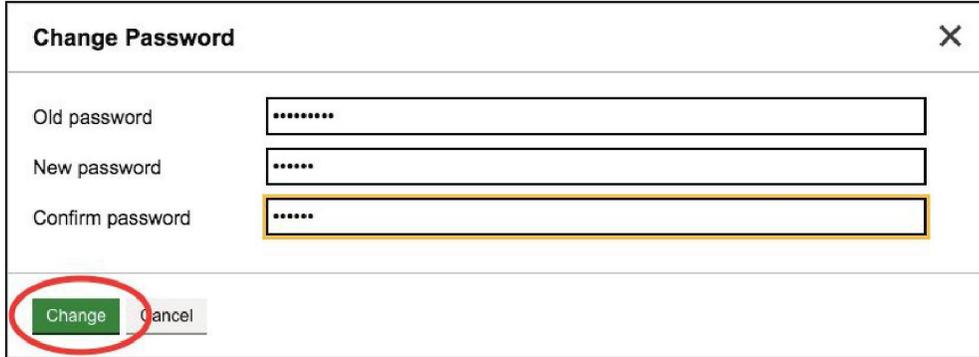
- You can access the portal through the following URL:
<https://pocabinetoffice.mendixcloud.com>
- Save this link as a bookmark
- Note that it is recommended to use Chrome or Edge browsers where possible
- Upon logging in it is suggested you change your password. To change your password select “My Account” at the top of the screen.



- Then click on the change password button.

A screenshot of the 'My Account' form. The form has a title bar with 'My Account' and a close button (X). It contains several fields: 'Full name' with the value 'Liz Larke', 'User name' with the value 'Liz', and 'Language' with a dropdown menu showing 'English, United Kingdom'. At the bottom of the form, there is a 'Change password' button, which is circled in red. Below this button are 'Save' and 'Cancel' buttons.

- Enter your existing password. Then enter the new password you wish to use and re-confirm it in the third text box. To complete the process click “Change”.



The image shows a 'Change Password' dialog box with a close button (X) in the top right corner. It contains three text input fields: 'Old password' (filled with seven asterisks), 'New password' (filled with six asterisks), and 'Confirm password' (filled with six asterisks). The 'Confirm password' field is highlighted with a yellow border. At the bottom left, there are two buttons: a green 'Change' button and a grey 'Cancel' button. The 'Change' button is circled in red.

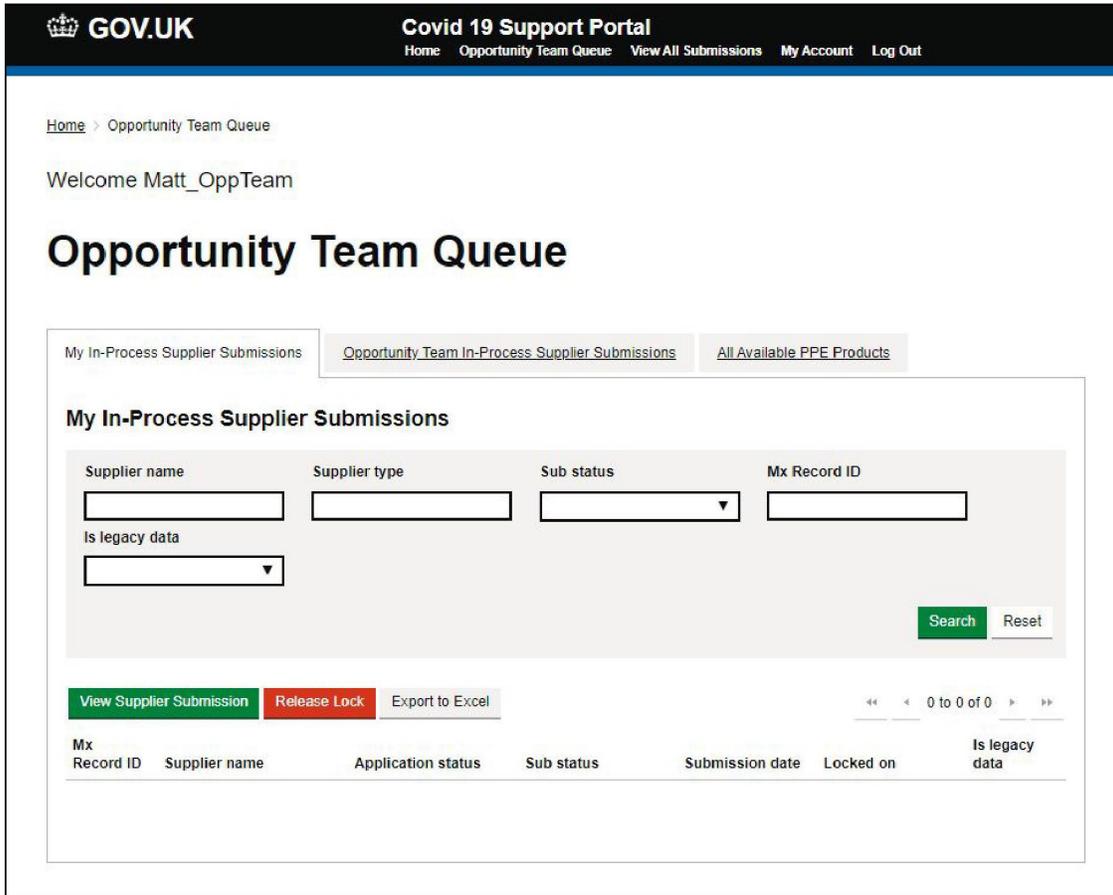
Password resets

If you have forgotten your password please email covid19mendixsupport@cabinetoffice.gov.uk to request a password reset.

Opportunity team

Navigating

After logging in, you will be presented with a tailored view to support your role.



The screenshot shows the 'Opportunity Team Queue' page in the COVID-19 Supplier Support Portal. The page header includes the GOV.UK logo and navigation links: Home, Opportunity Team Queue, View All Submissions, My Account, and Log Out. The breadcrumb trail is 'Home > Opportunity Team Queue'. A welcome message reads 'Welcome Matt_OppTeam'. The main heading is 'Opportunity Team Queue'. Below this, there are three tabs: 'My In-Process Supplier Submissions' (selected), 'Opportunity Team In-Process Supplier Submissions', and 'All Available PPE Products'. The 'My In-Process Supplier Submissions' section contains a search form with fields for 'Supplier name', 'Supplier type', 'Sub status' (a dropdown menu), and 'Mx Record ID'. There is also a checkbox for 'Is legacy data'. Search and Reset buttons are located to the right of the form. Below the search form are three buttons: 'View Supplier Submission' (green), 'Release Lock' (red), and 'Export to Excel' (grey). A pagination control shows '0 to 0 of 0'. Below the buttons is a table with the following columns: 'Mx Record ID', 'Supplier name', 'Application status', 'Sub status', 'Submission date', 'Locked on', and 'Is legacy data'. The table body is currently empty.

At the top of the page you will be able to navigate between two lists of cases:

- **Home / Opportunity Team Queue:** Cases that are being reviewed or waiting to be reviewed by the Opportunity Team
- **View All Submissions:** All cases regardless where they are in the workflow

Under **Opportunity Team Queue**, you will be able to use the following tab headings to navigate across the different work queues:

- **My In-Process Supplier Submissions:** Active cases that you are currently reviewing
- **Opportunity Team In-Process Supplier Submissions:** All cases that are currently being processed by the whole Opportunity team
- **All Available PPE Products:** All cases which are currently unassigned to caseworkers

Under **View All Submissions**, you will be able to view where each cases is in the entire workflow under the column **Application Status**

All Supplier Submissions

Supplier name Supplier type Sub status Mx Record ID

Is legacy data

[Search](#) [Reset](#)

[View Submission Audit Trail](#) [Export to Excel](#)

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Mx Record ID	Supplier name	Application status	Procurement sub status	Final due date	Locked by	Locked on
3077		Procurement	Order Placed			

In both lists, you can search for specific cases using the below criteria. You can search using some or all of the criteria, depending on what you are looking for.

- **Supplier name:** this allows you to filter cases by any particular supplier.
- **Supplier type:** whether a supplier is a manufacturer, agent, distributor etc.
- **Sub status:** this shows the status of the current cases
- **Mx Record ID:** unique identifier for that particular submission within the system.
- **Is legacy data:** this refers to old cases, prior to the system being implemented.
- **Locked by:** person that case is assigned to.

Viewing and Assigning cases

To view all cases, first navigate to the **All Available PPE Products** tab.

You can search for products of interest using the following criteria:

- **Supplier name:** name of supplier
- **Equipment type:** the main type of equipment on offer
- **Product name:** the product category
- **Product type:** the specific product being offered
- **Certification:** any information on product certification
- **Product location:** where the product is located
- **High Priority NHS:** a high priority flag used to triage cases
- **Donation:** a flag to show whether it appears that the product is a donation
- **VIP:** the offer is linked to a senior leader

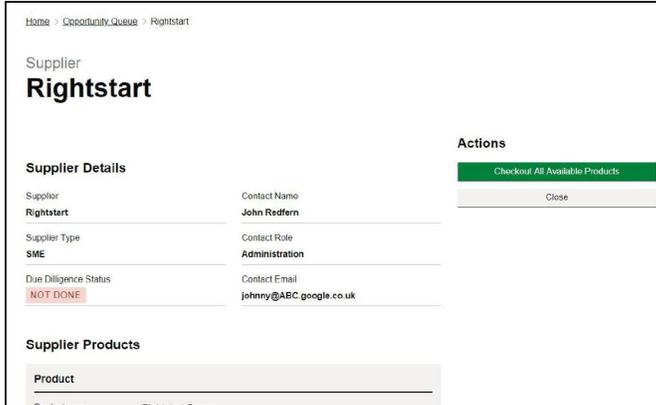
All Available PPE Products

Supplier name <input type="text"/>	Equipment type <input type="text"/>	Product name <input type="text"/>	Product type <input type="text"/>
Certification <input type="text"/>	Product location <input type="text"/>	High Priority NHS <input type="text"/>	Donation <input type="text"/>
VIP <input type="text"/>			

To select a case for further review, either double click on the case interest or click on the case and click the **View Supplier of Product** button to see this in more detail

View Supplier of Product							
Supplier name	Equipment type	Product name ▲	Product type	is donation	Certification	Product location	High priority NHS
Rightstart	Surgical Gowns	Rightstart Gowns	Gowns	No	GGE18ANO	Leeds	Yes

This will take you to the supplier page relating to the item you selected. This page provides details of the supplier and related products

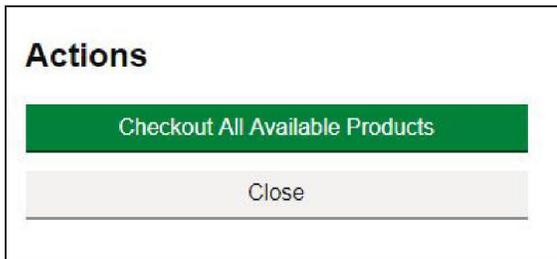


The screenshot shows a web page for a supplier named 'Rightstart'. The breadcrumb trail is 'Home > Opportunity Queue > Rightstart'. The page title is 'Supplier Rightstart'. There are three main sections: 'Supplier Details', 'Actions', and 'Supplier Products'. The 'Supplier Details' section contains a table with the following information:

Supplier	Contact Name
Rightstart	John Redfern
Supplier Type	Contact Role
SME	Administration
Due Diligence Status	Contact Email
NOT DONE	johnny@ABC.google.co.uk

The 'Actions' section contains two buttons: 'Checkout All Available Products' (highlighted in green) and 'Close'. The 'Supplier Products' section has a 'Product' label and a text input field.

In order to work on a given case, click the **Checkout All Available Products** button:



The image shows a close-up of the 'Actions' section. It contains two buttons: a green button labeled 'Checkout All Available Products' and a grey button labeled 'Close'.

After clicking this the case will be assigned to you. This will prevent others from being able to edit it. This will also add the supplier and its associated products to your work queue.

To view cases currently assigned to all Opportunity Team caseworkers but not yet completed, navigate to the **Opportunity Team In-Process Supplier Submissions** tab. If a case is currently being reviewed by a caseworker, this will be reflected under the **Locked by** and **Locked on** columns.

- **Locked by:** Name of caseworker reviewing that specific case
- **Locked on:** Date on which the case was assigned to the caseworker

Reviewing a Case

To review a case, either double click on the case of interest or click on the case and click the **View Supplier Submission** button to see this in more detail. Do note that if you click on **View Supplier Submissions** without selecting a particular submission, an error message will appear.

Mx Record ID	Supplier name	Sub status	Submission date	Locked on	Is legacy data	Case worker
3123	Trade Markets Direct		20/03/2020	09/04/2020	Yes	

As you engage with a supplier on a particular case, it is important that you update the system regularly.

Submission Decision

Sub Status

Case Worker **Matt_OppTeam**

Case Worker Notes

Supplier Products Add Product

Product	
Product name	<input type="text" value="N/A"/>
Equipment type	Other
Product type	<input type="text" value="Personal protection equipment"/>
Quantity	<input type="text" value="0"/>
Cost per unit (£)	<input type="text" value=""/>
Lead time (days)	<input type="text" value="0"/>

Approval

Decision

Comments

This involves setting the status of where the case is, adjusting values, volumes and lead times of products as required and also rejecting and approving products as needed prior to sending onto the technical assurance team.

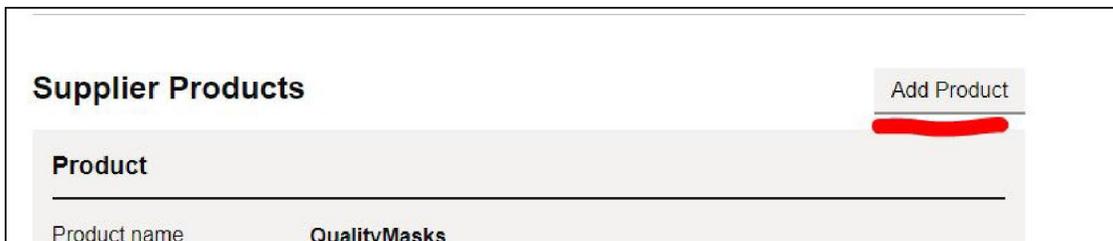
- **Sub Status:** Status as to your review such as whether you have contacted the supplier, if you are waiting for supplier's feedback or any other information. You can then click on **Save & Close** to review other opportunities while waiting for further information.
- **Case Worker Notes:** Any additional notes you have about the supplier
- **Product name:** Name of product as provided by the supplier; you may edit this field as required
- **Product type:** Type of product as provided by the supplier; you may edit this field as required
- **Quantity:** Estimated total volume of a potential order (what is our best guess at what the product volume would be if we were to place an order with the supplier)
- **Cost per unit (£):** Estimated value per item in pound sterling, excluding VAT, but including shipping and other overheads if known
- **Lead time (days):** Estimated lead time in days until the stock arrives in the UK

In the **Decision** field, select **Approve** or **Decline** accordingly. It is important to also add relevant information as attachments and comments which will then be passed onto the following teams as well as documents to support your decision.

Where a supplier is offering more than one product, you are able to approve specific products while rejecting others.

Adding a new product

Once further conversations have occurred with a supplier, it may be necessary to add an additional product. This can be achieved by clicking the **Add Product** button.



The screenshot shows a web interface titled "Supplier Products". In the top right corner, there is a button labeled "Add Product" which is highlighted with a red underline. Below the title, there is a table with a header row containing the text "Product". The table has two columns: "Product name" and "QualityMasks".

Sending to the Technical Assurance team

Once the case is ready to be handed over to the Technical Assurance team, click on the **Progress to Technical Approval / CaPa** button. If the supplier has offered more than one product and you wish to progress at least one of the products (even if you have declined any

other products offered by the supplier), click on the **Progress to Technical Approval / CaPa** button.

Actions

Progress to Technical Approval / CaPa

Decline and Do Not Proceed

Save & Close

Whether you progress the case or decline the case, you will be asked to provide further comment.

Where you have selected to progress the case, **you should provide a summary of information that would be useful for colleagues further down the process such as why you support progressing this case and more crucially, any risks or issues that you wish to flag.**

Click on **Confirm Progress to Technical Approval / CaPa** to confirm, or click on the **Cancel** button to go back to the Submission Details page.

If you have declined the submission, you will need to select a reason from the drop down and add any relevant information in the comments box. Once complete, click on the **Decline** button.

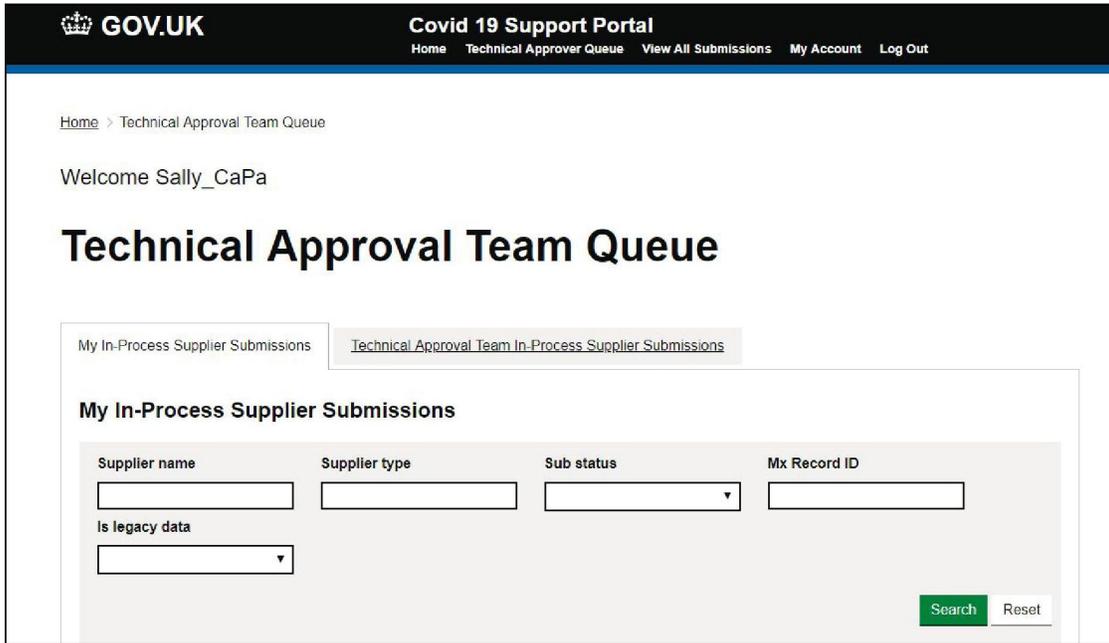
Once you have confirmed your decision, a pop up box will appear informing you that the case has been progressed. Click **OK**.

This item will no longer appear in the lists under the **My In-Process Supplier Submissions** or the **Opportunities Team In-Process Supplier Submissions** tabs as it will have gone through to the Technical Assurance team.

Technical Assurance (CaPa)

Navigating

After logging in, you will be presented with a tailored view to support your role.



The screenshot shows the 'Covid 19 Support Portal' interface. At the top, there is a navigation bar with 'GOV.UK' on the left and 'Covid 19 Support Portal' on the right, with links for 'Home', 'Technical Approver Queue', 'View All Submissions', 'My Account', and 'Log Out'. Below the navigation bar, the breadcrumb 'Home > Technical Approval Team Queue' is visible. A welcome message 'Welcome Sally_CaPa' is displayed. The main heading is 'Technical Approval Team Queue'. There are two tabs: 'My In-Process Supplier Submissions' and 'Technical Approval Team In-Process Supplier Submissions'. The 'My In-Process Supplier Submissions' tab is active. Below the tabs, there is a search form with the following fields: 'Supplier name', 'Supplier type', 'Sub status' (a dropdown menu), 'Mx Record ID', and 'Is legacy data' (a dropdown menu). There are 'Search' and 'Reset' buttons at the bottom right of the form.

At the top of the page you will be able to navigate between two lists of cases:

- **Home / Technical Approver Queue:** Cases that are being reviewed or waiting to be reviewed by the Technical Assurance team
- **View All Submissions:** All cases regardless where they are in the workflow



This screenshot shows the top navigation bar of the 'Covid 19 Support Portal'. It features the 'GOV.UK' logo on the left and the 'Covid 19 Support Portal' title on the right. Below the title, there are navigation links for 'Home', 'Technical Approver Queue', 'View All Submissions', 'My Account', and 'Log Out'.

Under **Technical Approver Queue**, you will be able to use the following tab headings to navigate across the different work queues:

- **My In-Process Supplier Submissions:** Active cases that you are currently reviewing
- **Technical Approval Team In-Process Supplier Submissions:** All cases that are currently being processed by the whole Technical Assurance team

Under **View All Submissions**, you will be able to view where each cases is in the entire workflow under the column **Application Status**

All Supplier Submissions

Supplier name Supplier type Sub status Mx Record ID

Is legacy data

[Search](#) [Reset](#)

[View Submission Audit Trail](#) [Export to Excel](#)

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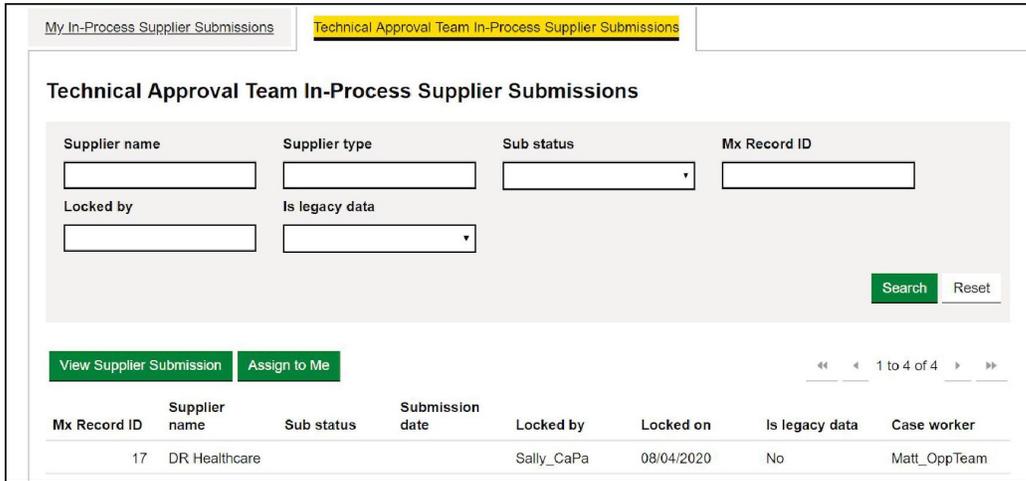
Mx Record ID	Supplier name	Application status	Procurement sub status	Final due date	Locked by	Locked on
3077		Procurement	Order Placed			

In both lists, you can search for specific cases using the below criteria. You can search using some or all of the criteria, depending on what you are looking for.

- **Supplier name:** this allows you to filter cases by any particular supplier.
- **Supplier type:** whether a supplier is a manufacturer, agent, distributor etc.
- **Sub status:** this shows the status of the current cases
- **Mx Record ID:** unique identifier for that particular submission within the system.
- **Is legacy data:** this refers to old cases, prior to the system being implemented.
- **Locked by:** person that case is assigned to.

Viewing and Assigning Cases

In order to view all cases that are currently being reviewed or are waiting to be reviewed by the Technical Assurance team, click on the **Technical Approval Team In-Process Supplier Submissions** tab.



My In-Process Supplier Submissions | **Technical Approval Team In-Process Supplier Submissions**

Technical Approval Team In-Process Supplier Submissions

Supplier name: Supplier type: Sub status: Mx Record ID:
 Locked by: Is legacy data:

Mx Record ID	Supplier name	Sub status	Submission date	Locked by	Locked on	Is legacy data	Case worker
17	DR Healthcare			Sally_CaPa	08/04/2020	No	Matt_OppTeam

If a case is currently being reviewed by a caseworker, this will be reflected under the **Locked by** and **Locked on** columns.

- **Locked by:** Name of caseworker reviewing that specific case
- **Locked on:** Date on which the case was assigned to the caseworker

To select a case for further review, either double click on the case interest or click on the case and click the **View Supplier Submission** button to see this in more detail.



Mx Record ID	Supplier name	Sub status	Submission date	Locked by	Locked on	Is legacy data	Case worker
3205	Asos/ Sinosky					Yes	
3206			19/03/2020			Yes	
3221	Tomato Source Limited		22/03/2020			Yes	
3227	MMD		09/03/2020			Yes	

To assign a case to yourself, click on the relevant row and then click on **Assign to Me**. The case will now move into the **My In-Process Supplier Submissions** tab, which is your personal working space.

To unassign a case from yourself, go to the **My In-Process Supplier Submissions** tab. Click on case of interest and click **Release Lock**.

View Supplier Submission Release Lock Export to Excel						
Mx Record ID	Supplier name	Sub status	Submission date	Locked on	Is legacy data	Case worker
1687	Omni-ID Limited		19/03/2020	08/04/2020	Yes	
1693	Vanguard Air Services LTD		21/03/2020	08/04/2020	Yes	
1707	Brand Avenue Ltd		23/03/2020	08/04/2020	Yes	
2309	ACP Export Ltd		08/04/2020	08/04/2020	No	Matt_OppTeam

Reviewing a Case

To review a case, either double click on the case of interest or click on the case and click the **View Supplier Submission** button to see this in more detail. Do note that if you click on **View Supplier Submissions** without selecting a particular submission, an error message will appear.

View Supplier Submission Release Lock Export to Excel						
Mx Record ID	Supplier name	Sub status	Submission date	Locked on	Is legacy data	Case worker
3123	Trade Markets Direct		20/03/2020	09/04/2020	Yes	

As you review a particular case, it is important that you update the system regularly.

This involves setting the status of where the case is, adjusting lead times of products as required and also rejecting and approving products as needed prior to sending it onto the Closing team.

- **Sub Status:** Where you are not yet able to make a decision, select **Escalation for further approval** then click on **Save & Close** to move onto other cases while you wait for further information.
- **Lead time (days):** Update the estimated lead time in days until the stock arrives in the UK as required.

Submission Decision

Sub Status

Case Worker **Matt_OppTeam**

Supplier Products

Product	
Product name	Rightstart Gowns
Equipment type	Surgical Gowns
Product type	Gowns
Quantity	100
Cost per unit (£)	1.40
Lead time (days)	<input type="text" value="8"/>

In the **Decision** field, select **Approve** or **Decline** accordingly. It is important to also add relevant information as attachments and comments which will then be passed onto the following teams as well as documents to support your decision.

Where a supplier is offering more than one product, you are able to approve specific products while rejecting others.

You will also be able to view comments from the Opportunities team caseworker who reviewed the case.

Approval

Decision

Comments

Submission Comments

Comment	
Comments	best gowns. buy them all
Actioned by	Date submitted
Matt_OppTeam	07/04/2020

Submission Attachments

No items found

Sending to the Closing team

Once the case is ready to be handed over to the Closing team, click on the **Progress to Closing Team** button. If the supplier has offered more than one product and you wish to progress at least one of the products (even if you have declined any other products offered by the supplier), click on the **Progress to Closing Team** button.

Actions

Progress to Closing Team

Decline and Do Not Proceed

Save & Close

Whether you progress the case or decline the case, you will be asked to provide further comment.

Where you have selected to progress the case, **you should provide a summary of information that would be useful for colleagues further down the process such as why you support progressing this case and more crucially, any risks or issues that you wish to flag.** Click on **Confirm Progress to Closing Team** to confirm, or click on the **Cancel** button to go back to the Submission Details page.

Supplier Submission Decision

By clicking on 'Confirm Progress to Closing Team', you acknowledge that that you have completed all the required actions.

Comments

Confirm Progress to Closing Team Cancel

If you have declined the submission, you will need to select a reason from the drop down and add any relevant information in the comments box. Once complete, click on the **Decline** button.

Supplier Submission Decision ✕

By clicking on 'Confirm Do Not Proceed', all Products within this Supplier Submission will be rejected and the workflow process ceased.

Reason for Do Not Proceed

Comments

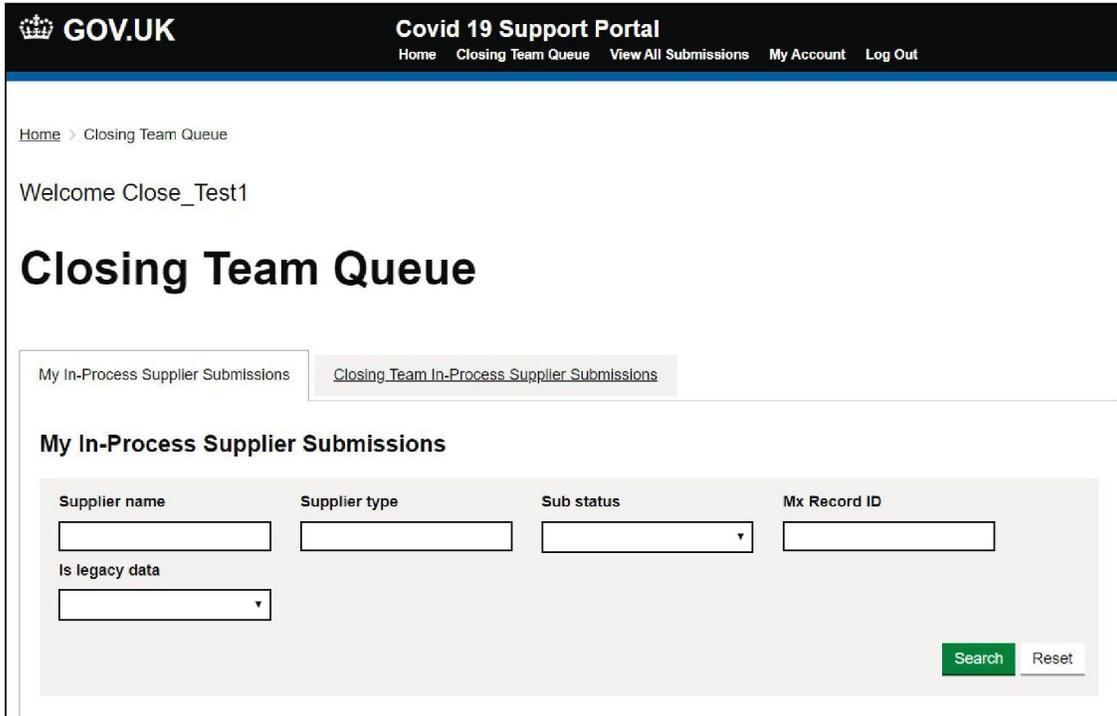
Once you have confirmed your decision, a pop up box will appear informing you that the case has been progressed. Click **OK**.

This item will no longer appear in the lists under the **My In-Process Supplier Submissions** or the **Technical Assurance Team In-Process Supplier Submissions** tabs as it will have gone through to the Closing team.

Closing team

Navigating

After logging in, you will be presented with a tailored view to support your role.



The screenshot shows the 'Covid 19 Support Portal' interface. At the top, there is a navigation bar with 'GOV.UK' on the left and 'Covid 19 Support Portal' in the center, with links for 'Home', 'Closing Team Queue', 'View All Submissions', 'My Account', and 'Log Out'. Below the navigation bar, the breadcrumb 'Home > Closing Team Queue' is visible. A welcome message 'Welcome Close_Test1' is displayed. The main heading is 'Closing Team Queue'. Below this, there are two tabs: 'My In-Process Supplier Submissions' (active) and 'Closing Team In-Process Supplier Submissions'. Under the active tab, there is a search form with the following fields: 'Supplier name', 'Supplier type', 'Sub status' (a dropdown menu), 'Mx Record ID', and 'Is legacy data' (a dropdown menu). A green 'Search' button and a 'Reset' button are located at the bottom right of the search form.

At the top of the page you will be able to navigate between two lists of cases:

- **Home / Closing Team Queue:** Cases that are being reviewed or waiting to be reviewed by the Closing team
- **View All Submissions:** All cases regardless where they are in the workflow



This screenshot shows the navigation bar of the 'Covid 19 Support Portal'. It features the 'GOV.UK' logo on the left and the portal title 'Covid 19 Support Portal' in the center. To the right of the title are navigation links: 'Home', 'Closing Team Queue', 'View All Submissions', 'My Account', and 'Log Out'.

Under **Closing Team Queue**, you will be able to use the following tab headings to navigate across the different work queues:

- **My In-Process Supplier Submissions:** Active cases that you are currently reviewing
- **Closing Team In-Process Supplier Submissions:** All cases that are currently being processed by the whole Closing team

Under **View All Submissions**, you will be able to view where each cases is in the entire workflow under the column **Application Status**

All Supplier Submissions

Supplier name

Supplier type

Sub status

Mx Record ID

Is legacy data

Search
Reset

View Submission Audit Trail
Export to Excel

« ‹ 1 to 10 of 767 › »

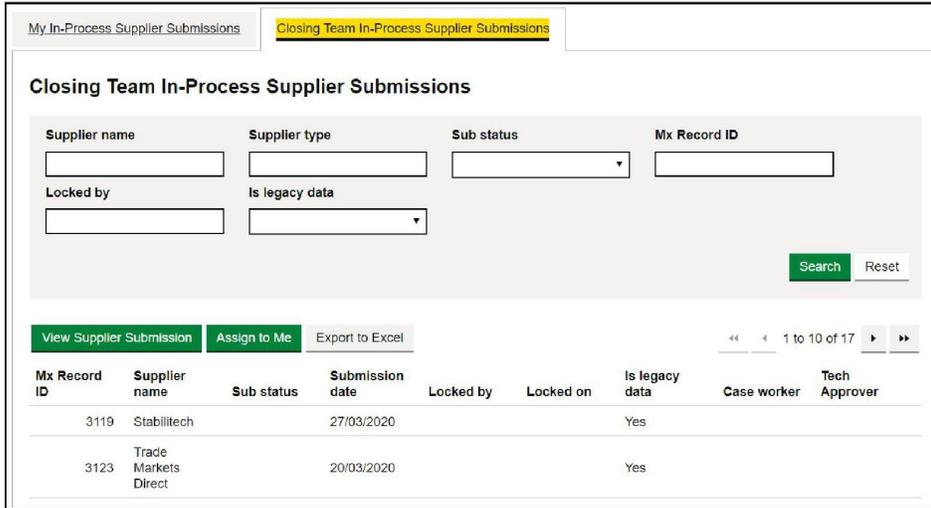
Mx Record ID	Supplier name	Application status	Procurement sub status	Final due date	Locked by	Locked on
3077		Procurement	Order Placed			

In both lists, you can search for specific cases using the below criteria. You can search using some or all of the criteria, depending on what you are looking for.

- **Supplier name:** this allows you to filter cases by any particular supplier.
- **Supplier type:** whether a supplier is a manufacturer, agent, distributor etc.
- **Sub status:** this shows the status of the current cases
- **Mx Record ID:** unique identifier for that particular submission within the system.
- **Is legacy data:** this refers to old cases, prior to the system being implemented.
- **Locked by:** person that case is assigned to.

Viewing and Assigning Cases

In order to view all cases that are currently being reviewed or are waiting to be reviewed by the Closing team, click on **Closing Team In-Process Supplier Submissions** tab.



My In-Process Supplier Submissions | **Closing Team In-Process Supplier Submissions**

Closing Team In-Process Supplier Submissions

Supplier name: Supplier type: Sub status: Mx Record ID:
 Locked by: Is legacy data:

[Search](#) [Reset](#)

[View Supplier Submission](#) [Assign to Me](#) [Export to Excel](#)

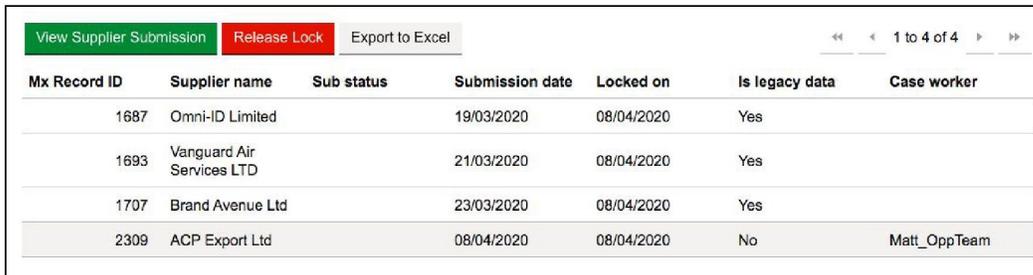
Mx Record ID	Supplier name	Sub status	Submission date	Locked by	Locked on	Is legacy data	Case worker	Tech Approver
3119	Stabilitech		27/03/2020			Yes		
3123	Trade Markets Direct		20/03/2020			Yes		

If a case is currently being reviewed by a caseworker, this will be reflected under the **Locked by** and **Locked on** columns.

- **Locked by:** Name of caseworker reviewing that specific case
- **Locked on:** Date on which the case was assigned to the caseworker

To assign a case to yourself, click on the relevant row and then click on **Assign to Me**. The case will now move into the **My In-Process Supplier Submissions** tab, which is your personal working space.

To unassign a case from yourself, go to the **My In-Process Supplier Submissions** tab. Click on case of interest and click **Release Lock**.



[View Supplier Submission](#) [Release Lock](#) [Export to Excel](#)

Mx Record ID	Supplier name	Sub status	Submission date	Locked on	Is legacy data	Case worker
1687	Omni-ID Limited		19/03/2020	08/04/2020	Yes	
1693	Vanguard Air Services LTD		21/03/2020	08/04/2020	Yes	
1707	Brand Avenue Ltd		23/03/2020	08/04/2020	Yes	
2309	ACP Export Ltd		08/04/2020	08/04/2020	No	Matt_OppTeam

Processing a Case

To review a case, either double click on the case of interest or click on the case and click the **View Supplier Submission** button to see this in more detail. Do note that if you click on **View Supplier Submissions** without selecting a particular submission, an error message will appear.

Mx Record ID	Supplier name	Sub status	Submission date	Locked on	Is legacy data	Case worker
3123	Trade Markets Direct		20/03/2020	09/04/2020	Yes	

As you review a particular case, it is important that you update the system regularly.

This involves setting the status of where the case is, adjusting product information as required and also rejecting and approving products as needed prior to sending onto the Procurement Team.

- **Sub Status:** Status as to your review such as whether you are in negotiations with supplier or requiring further approval. You can then click on **Save & Close** to review other cases while waiting for further information.
- **Quantity:** Estimated total volume of a potential order (what is our best guess at what the product volume would be if we were to place an order with the supplier)
- **Cost per unit (£):** Estimated value per item in pound sterling, excluding VAT, but including shipping and other overheads if known
- **Lead time (days):** Estimated lead time in days until the stock arrives in the UK

Submission Decision

Sub Status:

Case Worker:

Technical Approver:

Case Worker Notes

Supplier Products

Product

Product name:

Equipment type:

Product type:

Quantity:

Cost per unit (£):

Lead time (days):

In the **Decision** field, select **Approve** or **Decline** accordingly. It is important to also add relevant information as attachments and comments which will then be passed onto the following teams as well as documents to support your decision.

Where a supplier is offering more than one product, you are able to approve specific products while rejecting others.

Approval

Decision

Comments

Submission Attachments [Add Attachment](#)

No items found

[Progress to Procurement](#) [Decline and Do Not Proceed](#) [Save & Close](#)

You are able to view comments from previous caseworkers who have reviewed this case.

Submission Comments

Comment

Comments

Actioned by Date submitted

Comment

Comments

Actioned by Date submitted

Sending to the Procurement team

Once the case is ready to be handed over to the Closing team, click on the **Progress to Procurement** button. If the supplier has offered more than one product and you wish to progress at least one of the products (even if you have declined any other products offered by the supplier), click on the **Progress to Procurement** button.



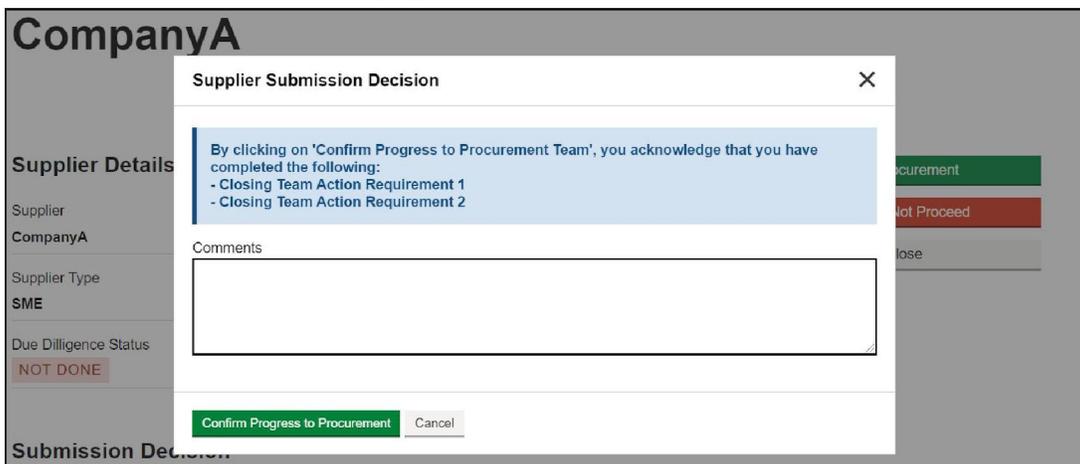
Actions

- Progress to Procurement
- Decline and Do Not Proceed
- Save & Close

Whether you progress the case or decline the case, you will be asked to provide further comment.

Where you have selected to progress the case, **you should provide a summary of information that would be useful for colleagues further down the process chain such as why you support progressing this case and more crucially, any risks or issues that you wish to flag.**

Click on **Confirm Progress to Procurement** to confirm, or click on the **Cancel** button to go back to the Submission Details page.



CompanyA

Supplier Submission Decision [X]

By clicking on 'Confirm Progress to Procurement Team', you acknowledge that you have completed the following:

- Closing Team Action Requirement 1
- Closing Team Action Requirement 2

Comments

Confirm Progress to Procurement Cancel

If you have declined the submission, you will need to select a reason from the drop down and add any relevant information in the comments box. Once complete, click on the **Decline** button.

The screenshot shows a modal window titled "Supplier Submission Decision" with a close button (X). A red warning banner at the top states: "By clicking on 'Confirm Do Not Proceed', all Products within this Supplier Submission will be rejected and the workflow process ceased." Below this, there is a "Reason for Do Not Proceed" dropdown menu and a "Comments" text area. At the bottom left of the modal is a "Cancel" button. The background shows a sidebar with "Supplier Details" for "CompanyA" (Supplier Type: SME, Due Diligence Status: NOT DONE) and a "Submission Decision" section with buttons for "Procurement", "Do Not Proceed", and "Close".

Once you have confirmed your decision, a pop up box will appear informing you that the case has been progressed. Click **OK**.

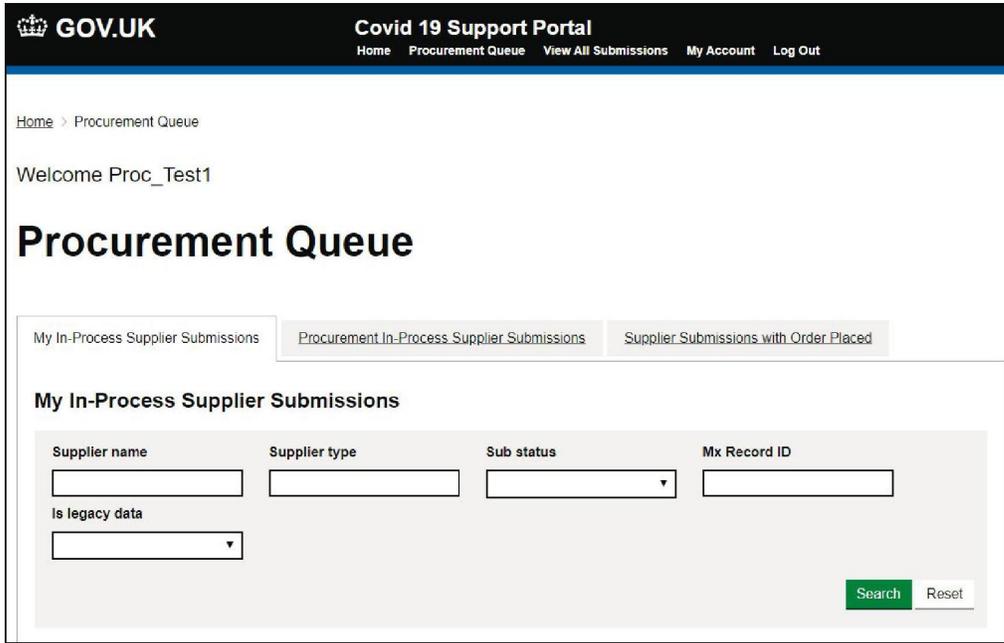
The screenshot shows the "Closing Team" page with a breadcrumb "Home > Closing Team Queue". An "Information" pop-up box is centered, displaying the message: "Supplier Submission MxID 8 successfully progressed to Procurement." with an "OK" button. Below the pop-up, the "My In-Process Supplier Submissions" section is visible, featuring a table with columns: "Sub status", "Submission date", "Supplier key", and "Is legacy data". Each column has a corresponding input field. At the bottom right of this section are "Search" and "Reset" buttons.

This item will no longer appear in the lists under the **My In-Process Supplier Submissions** or the **Closing Team In-Process Supplier Submissions** tabs as it will have gone through to the Procurement team.

Procurement team

Navigating

After logging in, you will be presented with a tailored view to support your role.



The screenshot shows the 'Procurement Queue' page in the COVID-19 Support Portal. At the top, there is a navigation bar with the GOV.UK logo, the portal title 'Covid 19 Support Portal', and links for Home, Procurement Queue, View All Submissions, My Account, and Log Out. Below the navigation bar, the breadcrumb 'Home > Procurement Queue' is visible. A welcome message 'Welcome Proc_Test1' is displayed. The main heading is 'Procurement Queue'. There are three tabs: 'My In-Process Supplier Submissions' (active), 'Procurement In-Process Supplier Submissions', and 'Supplier Submissions with Order Placed'. Under the active tab, there is a section titled 'My In-Process Supplier Submissions' containing a search form with fields for 'Supplier name', 'Supplier type', 'Sub status', 'Mx Record ID', and 'Is legacy data'. A green 'Search' button and a 'Reset' button are located at the bottom right of the search form.

At the top of the page you will be able to navigate between two lists of cases:

- **Home / Procurement Queue:** Cases that are being reviewed or waiting to be reviewed by the Procurement team
- **View All Submissions:** All cases regardless where they are in the workflow



The screenshot shows the navigation bar of the COVID-19 Support Portal. It features the GOV.UK logo on the left, the portal title 'Covid 19 Support Portal' in the center, and navigation links for Home, Procurement Queue, View All Submissions, My Account, and Log Out on the right.

Under **Closing Team Queue**, you will be able to use the following tab headings to navigate across the different work queues:

- **My In-Process Supplier Submissions:** Active cases that you are currently reviewing
- **Procurement In-Process Supplier Submissions:** All cases that are currently being reviewed or are waiting to be reviewed by the whole Procurement team
- **Supplier Submissions with Order Placed:** All cases where orders have been placed

Under **View All Submissions**, you will be able to view where each cases is in the entire workflow under the column **Application Status**

All Supplier Submissions

Supplier name Supplier type Sub status Mx Record ID

Is legacy data

[Search](#) [Reset](#)

[View Submission Audit Trail](#) [Export to Excel](#)

 « < 1 to 10 of 767 > »

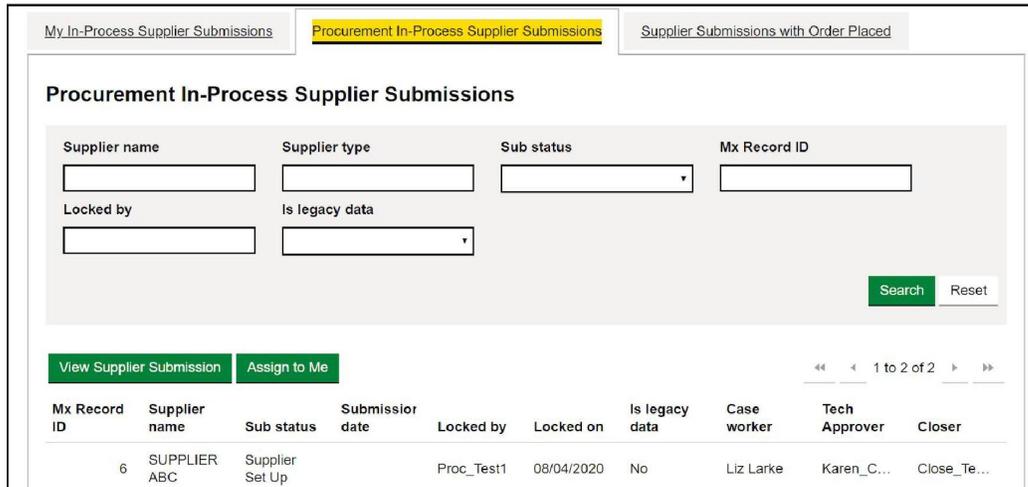
Mx Record ID	Supplier name	Application status	Procurement sub status	Final due date	Locked by	Locked on
3077		Procurement	Order Placed			

In both lists, you can search for specific cases using the below criteria. You can search using some or all of the criteria, depending on what you are looking for.

- **Supplier name:** this allows you to filter cases by any particular supplier.
- **Supplier type:** whether a supplier is a manufacturer, agent, distributor etc.
- **Sub status:** this shows the status of the current cases
- **Mx Record ID:** unique identifier for that particular submission within the system.
- **Is legacy data:** this refers to old cases, prior to the system being implemented.
- **Locked by:** person that case is assigned to.

Viewing and Assigning Cases

In order to view all cases that are currently being processed or are waiting to be processed by the Procurement team, click on **Procurement In-Process Supplier Submissions** tab.



My In-Process Supplier Submissions | **Procurement In-Process Supplier Submissions** | Supplier Submissions with Order Placed

Procurement In-Process Supplier Submissions

Supplier name: Supplier type: Sub status: Mx Record ID:

Locked by: Is legacy data:

[Search](#) [Reset](#)

[View Supplier Submission](#) [Assign to Me](#)

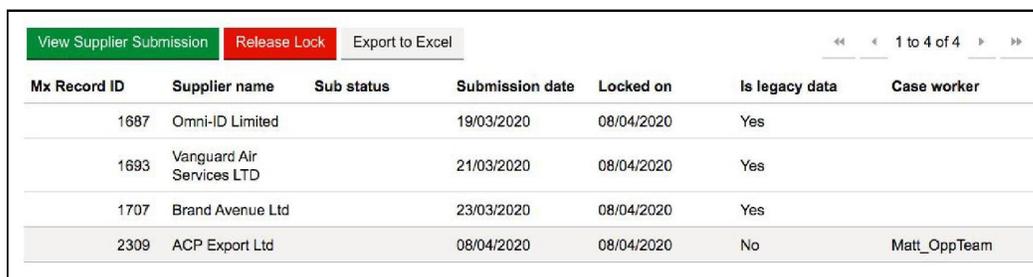
Mx Record ID	Supplier name	Sub status	Submission date	Locked by	Locked on	Is legacy data	Case worker	Tech Approver	Closer
6	SUPPLIER ABC	Supplier Set Up		Proc_Test1	08/04/2020	No	Liz Larke	Karen_C...	Close_Te...

If a case is currently being reviewed by a caseworker, this will be reflected under the **Locked by** and **Locked on** columns.

- **Locked by:** Name of caseworker reviewing that specific case
- **Locked on:** Date on which the case was assigned to the caseworker

To assign a case to yourself, click on the item one you want to assign and then click on **Assign to me**. The case will now move into the **My In-Process Supplier Submissions** tab, which is your personal working space.

To unassign a case from yourself, go to the **My In-Process Supplier Submissions** tab. Click on case of interest and click **Release Lock**.



[View Supplier Submission](#) [Release Lock](#) [Export to Excel](#)

Mx Record ID	Supplier name	Sub status	Submission date	Locked on	Is legacy data	Case worker
1687	Omni-ID Limited		19/03/2020	08/04/2020	Yes	
1693	Vanguard Air Services LTD		21/03/2020	08/04/2020	Yes	
1707	Brand Avenue Ltd		23/03/2020	08/04/2020	Yes	
2309	ACP Export Ltd		08/04/2020	08/04/2020	No	Matt_OppTeam

Processing a Case

To process a case, either double click on the case of interest or click on the case and click the **View Supplier Submission** button to see this in more detail. Do note that if you click on **View Supplier Submissions** without selecting a particular case, an error message will appear.

View Supplier Submission							
Mx Record ID	Supplier name	Application status	Sub status	Submission date	Locked on	Is legacy data	Case worker
6	SUPPLIER ABC	Technical Approval / CaPa			0 07/04/2020	No	Liz Larke

As you process a particular case, it is important that you update the system regularly.

This involves setting the status of where the case is, adjusting product information as required and also rejecting and approving products as needed so that accurate data can be reported and sent to the logistics partners.

- **Sub Status:** Status as to your progress such as whether the supplier has been set up. You can then click on **Save & Close** to process other cases while waiting for further information.
- **Quantity:** Estimated total volume of a potential order (what is our best guess at what the product volume would be if we were to place an order with the supplier)
- **Cost per unit (£):** Estimated value per item in pound sterling, excluding VAT, but including shipping and other overheads if known
- **Lead time (days):** Estimated lead time in days until the stock arrives in the UK

Submission Decision

Sub Status

Case Worker **Matt_OppTeam**

Supplier Products

Product	
Product name	Rightstart Gowns
Equipment type	Surgical Gowns
Product type	Gowns
Quantity	100
Cost per unit (£)	1.40
Lead time (days)	<input type="text" value="8"/>

In the **Decision** field, select **Approve** or **Decline** accordingly. It is important to also add relevant information as attachments and comments which will then be passed onto the following teams as well as documents to support your decision.

Where a supplier is offering more than one product, you are able to approve specific products while rejecting others.

Approval

Decision

Comments

Submission Attachments

[Add Attachment](#)

No items found

[Progress to Procurement](#) [Decline and Do Not Proceed](#) [Save & Close](#)

You are able to view comments from previous caseworkers who have reviewed this submission.

Submission Comments

Comment

Comments

Actioned by Date submitted

Comment

Comments

Actioned by Date submitted

Placing Order

Once the order has been placed, click on the **Mark as Order Placed** button. If the supplier has offered more than one product and you wish to progress at least one of the products (even if you have declined any other products offered by the supplier), click on the **Mark as Order Placed** button.

Actions

Mark as Order Placed

Decline and Do Not Proceed

Save & Close

Whether you confirm or decline the order, you will be asked to provide further comment.

Where you have placed an order, **you should provide a summary of information that would be useful for an audit trail**. Click on **Confirm Order Placed** to confirm, or click on the **Cancel** button to go back to the Submission Details page.

Supplier Submission Decision ✕

By clicking on 'Confirm Order Placed', you acknowledge that you have completed the following:

- Procurement Team Action Requirement 1
- ProcurementTeam Action Requirement 2

Comments

Confirm Order Placed
Cancel

If you have declined the case you will need to select a reason from the drop down and add any relevant information in the comments box. Once complete, click on the **Decline** button.

Once you confirm the order and update your comments, this will then move to the **Supplier Submissions with Order Placed** tab.

My In-Process Supplier Submissions
Procurement In-Process Supplier Submissions
Supplier Submissions with Order Placed

Supplier Submissions with Order Placed

Supplier name

Supplier type

Sub status

Mx Record ID

Is legacy data

Search
Reset

View Supplier Submission

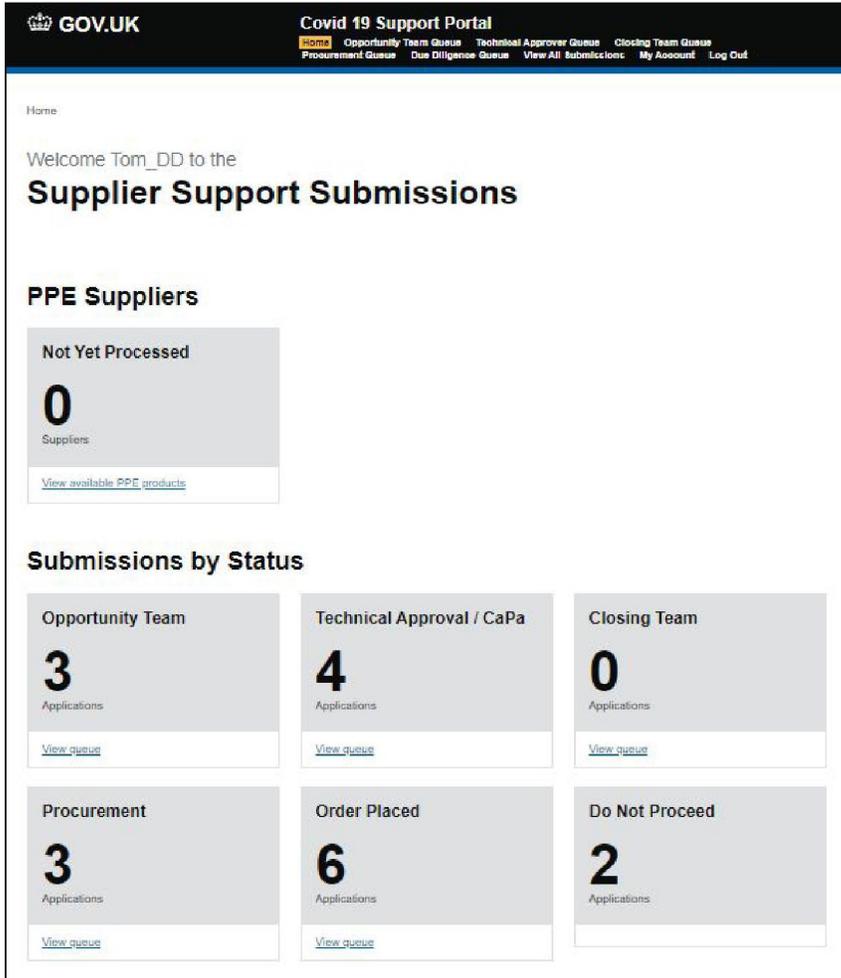
 << < 1 to 6 of 6 > >>

Mx Record ID	Supplier name	Final due date	Locked by	Locked on	Is legacy data	Case worker	Tech Approver	Closer	Procurement
8	CompanyA	15/04/2020			No	Liz Larke	Stephanie Petrakis	Close_Te...	Proc_Test1

Supplier Due Diligence team

Navigating

After logging in, you will be presented with a view of all the supplier submissions that are in queues across all teams.



The screenshot shows the 'Covid 19 Support Portal' dashboard. At the top, there is a navigation bar with 'Home' highlighted and other links: 'Opportunity Team Queue', 'Technical Approver Queue', 'Closing Team Queue', 'Procurement Queue', 'Due Diligence Queue', 'View All Submissions', 'My Account', and 'Log Out'. The main content area starts with a 'Home' link and a welcome message: 'Welcome Tom_DD to the Supplier Support Submissions'. Below this is a section for 'PPE Suppliers' with a card showing 'Not Yet Processed' and '0 Suppliers', with a link to 'View available PPE products'. The 'Submissions by Status' section contains six cards: 'Opportunity Team' (3 Applications), 'Technical Approval / CaPa' (4 Applications), 'Closing Team' (0 Applications), 'Procurement' (3 Applications), 'Order Placed' (6 Applications), and 'Do Not Proceed' (2 Applications). Each card has a 'View queue' link.

Status	Count	Unit
Not Yet Processed	0	Suppliers
Opportunity Team	3	Applications
Technical Approval / CaPa	4	Applications
Closing Team	0	Applications
Procurement	3	Applications
Order Placed	6	Applications
Do Not Proceed	2	Applications

At the top of the page you will be able to navigate between the **Home** page (above screen), each team's queue of cases as well as a list of all cases.

- **Due Diligence Queue:** Cases that are being reviewed or waiting to be reviewed by the Due Diligence team
- **View All Submissions:** All cases regardless where they are in the workflow

To view cases being reviewed and to be reviewed by the Due Diligence team, go to **Due Diligence Queue**. You will be able to use the following tab headings to navigate across the different work queues:

- **My In-Process Supplier:** Active cases that you are currently reviewing
- **Unverified Suppliers:** All suppliers that require due diligence and are not yet assigned to any member of the Due Diligence team
- **All In-Progress Suppliers:** All suppliers currently being reviewed by the whole Due Diligence team
- **Verified Suppliers:** Suppliers that have been verified by the Due Diligence team

Supplier Due Diligence

My In-Progress Suppliers
Unverified Suppliers
All In-Progress Suppliers
Verified Suppliers

Verified Suppliers

Supplier name

Supplier type

Search Reset

Details
« < 1 to 20 of 74 > »

Supplier key	Supplier name	Supplier type	DD Status	DD Outcome
22118	Bailey Instruments Ltd	Agent & Distributor	COMPLETE	PROCEED
22130	Banton Frameworks LTD	Manufacturer	COMPLETE	REJECT
22140	Baytun Online Limited		COMPLETE	REJECT

You can search for specific suppliers **Supplier name** and/or **Supplier type**. You are also able to search by partial text.

Viewing and Assigning Suppliers for Verification

Navigate to the **Unverified Suppliers** tab to view a list of suppliers awaiting verification.

Details
Mark In Progress
« < 1 to 20 of 5190 > »

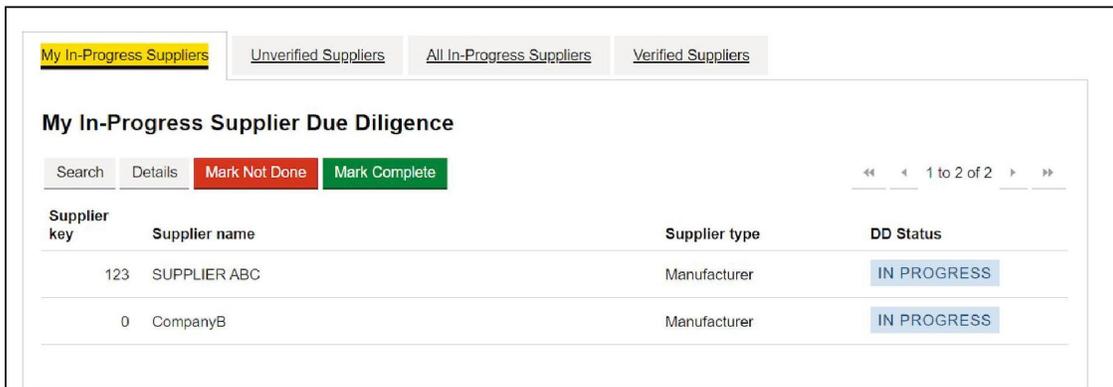
Supplier key	Supplier name	Supplier type	DD Status
21777			
21778			
21780			

To see further details on a supplier before assigning to yourself, either double click on the relevant row in the list, or click on the row and click the **Details** button.

To assign a supplier to yourself, click on the relevant row and click on the **Mark In-Progress** button. This supplier will then move to the **My In-Progress Suppliers** tab.

Please note that this action will not automatically take you to the **My In-Progress Suppliers** tab, it will take you back to the list of suppliers requiring due diligence in the **Unverified Suppliers** tab.

To unassign a supplier from yourself, go to the **My In-Progress Suppliers** tab and click on the relevant supplier row, then click on the **Mark Not Done** button. This supplier record will move back into the list in the **Unverified Suppliers** tab.



My In-Progress Suppliers | Unverified Suppliers | All In-Progress Suppliers | Verified Suppliers

My In-Progress Supplier Due Diligence

Search | Details | **Mark Not Done** | **Mark Complete**

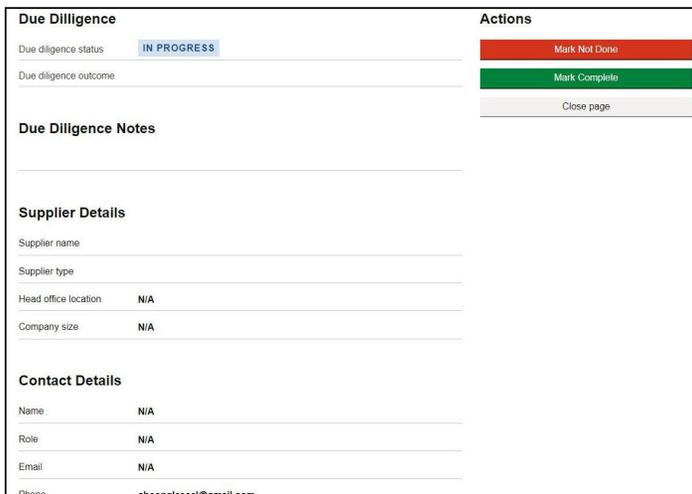
<< < 1 to 2 of 2 > >>

Supplier key	Supplier name	Supplier type	DD Status
123	SUPPLIER ABC	Manufacturer	IN PROGRESS
0	CompanyB	Manufacturer	IN PROGRESS

Reviewing a Supplier

Navigate to the **My In-Progress Suppliers** tab.

To see further details on a supplier before assigning to yourself, either double click on the relevant row in the list, or click on the row and click the **Details** button.



Due Diligence

Due diligence status: **IN PROGRESS**
 Due diligence outcome:

Due Diligence Notes

Supplier Details

Supplier name: _____
 Supplier type: _____
 Head office location: **N/A**
 Company size: **N/A**

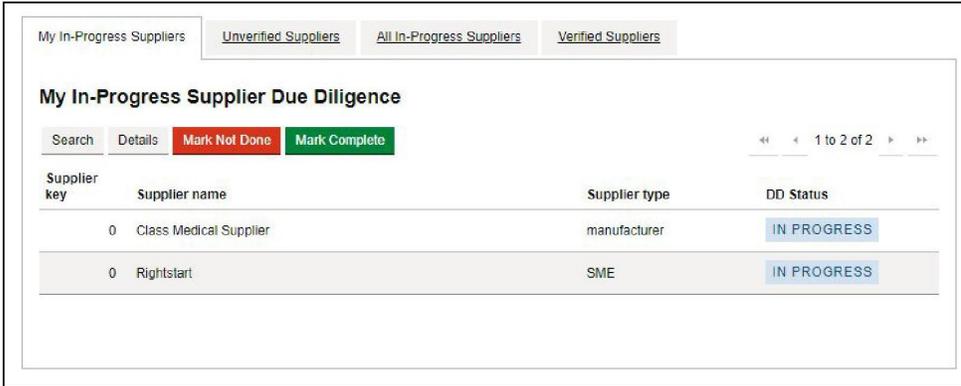
Contact Details

Name: **N/A**
 Role: **N/A**
 Email: **N/A**
 Phone: **chopantsecd@gmail.com**

Actions

Mark Not Done
Mark Complete
 Close page

Once due diligence is completed on a supplier assigned to you, click on the supplier row and select the **Mark Complete** button.



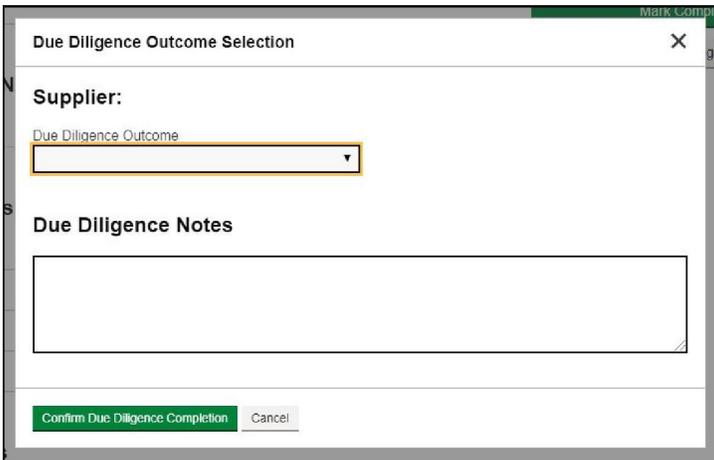
My In-Progress Suppliers Unverified Suppliers All In-Progress Suppliers Verified Suppliers

My In-Progress Supplier Due Diligence

Search Details **Mark Not Done** **Mark Complete** << < 1 to 2 of 2 > >>

Supplier key	Supplier name	Supplier type	DD Status
0	Class Medical Supplier	manufacturer	IN PROGRESS
0	Rightstart	SME	IN PROGRESS

A pop up box will appear requiring you to select an outcome from the drop down menu and provide any notes you wish to record such as information to support your decision as well as any risks or issues you would like to highlight to other colleagues in the workflow. Click on the **Confirm Due Diligence Completion** button if you would like to proceed. Click on the **Cancel** button to exit the screen if you do not wish to select an outcome.



Due Diligence Outcome Selection

Supplier:

Due Diligence Outcome

Due Diligence Notes

Confirm Due Diligence Completion Cancel

Once you have clicked on the **Confirm Due Diligence Completion** button, the supplier will disappear from your queue and move to the **Verified Suppliers** tab. You will be able to see a list of all verified suppliers and their outcomes on the **Verified Suppliers** tab.

Viewing supplier records in progress across the DD team

The list of all suppliers that are currently being reviewed by the DD team will be shown on the **All In-Progress Suppliers** tab.

My In-Progress Suppliers					Unverified Suppliers					All In-Progress Suppliers					Verified Suppliers				
All In-Progress Supplier Due Diligence										<input type="text"/> <input type="button" value="Details"/> 1 to 2 of 2									
Supplier key	Supplier name	Supplier type	DD Status	Locked by															
	SUPPLIER 123	Distributor	IN PROGRESS	Ashley_DD															
0	CompanyB	Manufacturer	IN PROGRESS	Tom_DD															

On this list you will be able to view what supplier record is being reviewed by which team member in the **Locked by** column.

If you need to unassign a team member to a supplier, double click on the relevant record or click on the supplier record and click on the **Details** button. On the Details page click the **Mark Not Done** button. Once done, this record will be placed back on the list under the **Unverified Suppliers** tab.

Supplier

SUPPLIER 123

Supplier Details

Supplier	SUPPLIER 123	Contact Name	Supplier 123 Contat
Supplier Type	Distributor	Contact Role	Warehouse Supervisor
Due Diligence Status	IN PROGRESS	Contact Email	supplier123@test.com

Actions

Mark Not Done

Close page

Mark Not Done

Close page

Verified Suppliers and Outcomes

To see a list of all suppliers that have been verified and completed by the DD team, click on the **Verified Suppliers** tab. Here you will also be able to view the outcome of the suppliers that have undergone due diligence. To view further details double click on the relevant supplier row, or click on the row and click the **Details** button.

You can also search for a particular supplier by using the **Search** function.