

Supplier Requests

Overview

Scenario: The school identify a supplier that they would like to use, which they are not able to find on the finance system.

Supplier verifications must be completed prior to placing a contract with the supplier.

Checks can take up to 5 working days, or longer if EFSA approval is required.

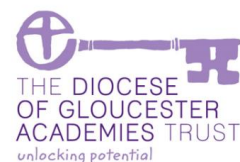
Please note the rules for related party suppliers have changed as EFSA now require notification of the intention to use a supplier for each new contract, regardless of the value.

The Process

Step	School	System	Central Finance Team
1	<ul style="list-style-type: none"> The need for a new supplier is identified at the school. 		
2	<ul style="list-style-type: none"> Enter the required supplier detail as a supplier request on the finance system. Add supporting documents for example quotations, links to web sites if available, information relating to related parties or IR35 assessment. Add details of whether supplier is a related party, for example family member of the Head Teacher. Add IR35 assessment if undertaken. Submit the request. 		
3		<ul style="list-style-type: none"> Automatic Notification of Request sent to finance system 	
4			<ul style="list-style-type: none"> Supplier request is received electronically. Supplier request is reviewed. Supplier verification checks are carried out, which include bank account verification.
5			<ul style="list-style-type: none"> Verified suppliers are marked as approved and the supplier is updated on the supplier database to be used.
6			<ul style="list-style-type: none"> Confirm supplier payment group is populated.
7		<ul style="list-style-type: none"> Automatic Notification of the results are sent to originator. 	
8	<ul style="list-style-type: none"> Email notification sent to originator that the supplier is available to be used on the finance system. Rejections are also notified, so the school can review/rectify. 		

Finance Handbook

Last Reviewed: 11 November 2023



Step	School	System	Central Finance Team
9	<ul style="list-style-type: none">School can enter the purchase request against the supplier.		