eDirect User Guide

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Version 1

Contents

Key

> 💡 **Undergoing Transformation**
>
> There are some areas of eDirect which are currently being worked upon and improvements will be delivered soon. Look out for this icon across the document to highlight our areas under development.

The eDirect Supply Route

Over 650 customers order through the eDirect channel, and we successfully process in excess of a million individual orders per year, with around 650 of our customer bases. This is a successful channel offering flexible solutions required by certain product categories.

eDirect 🅔 products are ordered from NHS Supply Chain but are delivered directly to you by the supplier, or their courier, subject to the confirmed lead time.

By providing this route we can offer customers:
- 24 hour or next working day lead time, where a supplier offers this lead time.
- The procurement and transacting of products with complex logistics requirements. For example, temperature controlled storage.
- Access to a wider range of products that traditionally the NHS Supply Chain network could not accommodate.
- Access to the benefits of NHS Supply Chain without losing the service received when ordering directly with suppliers.
  This includes:
    o Deliveries
    o Reporting
    o Systems and tools.
- Full access to increased ranges and sizes where there is a warranted variation and a genuine requirement.

Other NHS Supply Chain Supply Routes

When an order is placed via NHS Supply Chain, in addition to eDirect, there are three other possible routes for order fulfilment:
- **Stocked** – These products are stocked in our national and regional warehouses. We are able to deliver within a standard 48 hours lead time for all products, subject to preferred delivery days.

- **Blue Diamond** – These products are not stocked in our warehouses. They are delivered to us, consolidated with the rest of your order and then delivered to you. Some products have lead times longer than our standard 48 hours so will be delivered subject to your preferred delivery days and confirmed lead time.
- **Direct** – The order is placed directly with a supplier (not transacted) and delivered by the supplier. The NHS Supply Chain framework reference is cited on orders to provide OJEU compliance.

For more information please see our Guide to NHS Supply Chain Product Supply Routes and Lead Times on our user guides page https://www.supplychain.nhs.uk/userguides

Our website also contains full user guides relating to our ecommerce systems, reports and services: https://www.supplychain.nhs.uk/userguides

Guides available include:
- Online Catalogue and Ordering
- eDC and eDC Gold
- Billing
- Home Delivery Service.

eDirect Customer Types

eDC and eDC Gold customers

eDC offers smart stock management for high volume, low value goods and is in use across 140 NHS Trusts.

eDC Gold is an extension to the eDC system offering an inventory management platform for high value, critical care products delivering improved track and traceability, enriched management data functionality and procurement savings. eDC Gold is currently the most prevalent Inventory and Materials Management system in use across the NHS.

Both systems can work with the same barcode scanning device and are implemented free of charge to the NHS. For more information please visit our eDC and eDC Gold webpage: https://www.supplychain.nhs.uk/edc-gold/

NHS Supply Chain online ordering only customers

NHS Supply Chain Online Catalogue and Ordering enables you to browse the catalogue of items available to you and to create an order by adding items to your shopping trolley.

As well as adding items from the Catalogue, you can request products using their unique National Product Code (NPC). For frequently ordered products, you can:
- Save NPC's as favourites to find them again quickly
- Create standing orders to simplify the order process.

Online Ordering allows a customer to place a single order for all their needs, which may include items from Stocked, Blue Diamond and eDirect orders. See the 'eDirect Supply Route' and 'Other NHS Supply Chain Supply Routes' sections above for further information.

Third party Procure to Pay or Source to Pay systems customers

These customers have selected to use their own inventory management system to either send orders direct or route them via specific Procure to Pay (P2P) or Source to Pay (S2P) systems. These systems have been coded or configured to work with our customer's own financial and procurement systems. NHS Supply Chain do not have any control over third party system functioning which are managed by our customer's IT, Finance and Procurement teams.

Common problems occur with order processing depending upon how these systems have been configured to operate. Some problems are a result of:

- How the orders are transmitted to us
- Order reference fields that are used for dual purposes
- The frequency we are sent orders from the customer system
- An out of date catalogue displaying incorrect lead times, a delisted product or incorrect product cost
- Not enabling our 'Online Ordering' system to run in parallel to the third party P2P or S2P system.

We recommend all customers operating a third party P2P or S2P system to work with NHS Supply Chain to review, configure and enable your systems to achieve the best and most efficient results.

Order Transmission Routes

NHS Supply Chain is set up to receive orders using modern technology and transmission methods. Some third party systems transmit orders through such routes, others are yet to configure their systems to do so.

This has an impact on how the order is received, read and processed. The most common use of these notes is for the passing of batch, lot or serial number data for the management of vendor consigned stock.

We advise discussing this with your IT team to ensure that the selected system is indeed transmitting as expected.

Order notes are particularly impacted by the order transmission route and can be missed / lost during transmission. To maintain order notes, there are four preferable ways in which to transmit an order using NHS Supply Chain systems:

1. **PEPPOL** – This is an established transmission route. It is important to be aware that while some system suppliers claim to meet PEPPOL 'compliance', this may not correlate to how they are currently transmitting orders and it is worth exploring.
2. **cXML format**
3. **NHS Supply Chain Online Ordering system**
4. **EDI email** – This is a temporary solution as EDI email is not a guaranteed delivery method and does not adhere to modern security requirements.

If the transmission method does not conform to any of these methods, then we would advise that this is reviewed with your third party P2P or S2P system provider as soon as possible.

For further information please contact our NetEDI PEPPOL Onboarding Team either by phone to 0800 319 6134 or email to nhssupplychain@netedi.co.uk

Order References

The eDirect order references are:

- **Local reference or customer to NHS Supply Chain order reference** – created when a customer uses a third party P2P or S2P system to place an order
- **Purchase Order Number** – NHS Supply Chain order system sends this to our supplier via our EDI gateway (initial to represent supply chain depot reference, six numbers, ending "D" or "X" if order is imported to us from a third-party ordering system). This is an NHS Supply Chain sales reference
- **Requisition number** – Six characters ending in "X", unless is eDC which ends in "M" or Online Ordering which ends in "W"
- **Requisition point** – the department identifier code and description. It is crucial to allow customers to identify the department who placed the order.

Third party system configurations

A customers third party P2P or S2P system must be configured to capture and send the above order references to NHS Supply Chain. When they do, all orders we send to the eDirect suppliers will have all four of the above references on them. All four of the above references should be supplied with the delivery paperwork.

In order to receipt the order, the delivery paperwork must include the local reference or customer to NHS Supply Chain order reference.

There are two common third party issues that prevent order references being transmitted:

1. **Some of our customer's own third part P2P systems do not send orders via the standard PEPPOL route.** This leads to issues on eDirect order referencing when we receive the order. These customers may not be aware that their P2P is not sending via PEPPOL. While the provider claims to be PEPPOL compliant, some are still sending orders in legacy formats. It is important to clarify this with your third-party P2P provider. NHS Supply Chain would be happy to assist our customers in these conversations if required.
2. **Some third-party P2P systems append notes into the local reference field as they are unable to send as a note format.** This field is not designed to cater for a header and / or line notes and results in character loss. Depending on the method that the P2P systems send us the order, it can further reduce the character limit to between 17 and 50. If your current P2P system operates in this way, please contact your IT team to address this. Our technical resource is always ready and able to contribute should you need us to.

Local Reference field

Every order contains a field to allow our customers to populate the order with their own PO reference number, this field within NHS Supply Chain systems is called a 'Local Reference'. This field is not mandatory and can be left blank if necessary. The Local Reference field is recorded within the systems and is reportable on.

When it is included on an order it is always transferred out to the suppliers with the supplier outbound order for inclusion on the delivery paperwork.

Supplier obligations

Suppliers are contractually obliged to include four mandatory data fields on the delivery if they have received them:

- Requisition Point Code
- Requisition Point Description
- Requisition Number
- Local Reference.

For the suppliers who are electronically integrated with our systems this field is automatically transferred onto the delivery paperwork. Where suppliers are not electronically integrated there is a small risk of human error that the reference is missed when manually entering the field. In turn, the reference is then missing from the paperwork. A performance audit found that suppliers largely performed well in this area when the reference number is received. It is important to remember that the risk of missing eDirect order references is no greater than orders sent directly to suppliers.

An example of an NHS Supply Chain to supplier order
The four order references are highlighted below.

Status: Authorised and written to supplier file (*Written to 13406300-9200.CSV status changed by OutputAuthOrders at 22-Apr-2020 10:16:29*)

Supplier: 13406300 [0827002100183]   Deliver To: 907GS9841

Purchase Order Number: M1008391D   Order Date: 22-Apr-2020   Delivery Date: 27-Apr-2020

eDirect Customer Order Details *(to be printed on delivery paperwork)*:

| Requisition Number | 46274X | Local Reference | 9995~CPC2137373 |
| Requisition Point | CA02B4 | GUTANMAIN (MM) | |

Line	NPC	Description	EAN/GTIN	MPC	Unit of purchase	Quantity	Price	Value
1	FDG1317	AIRWAY EXCHANGE CATHETR 14FR 83CM G07873	00827002078734	G07873	Each	1		

Lines ordered: 1   Order Value (excl VAT):

What to do if you cannot find a reference
Contact your NHS Supply Chain Customer Services Advisor, who can raise this with the supplier and escalate the issue to the relevant procurement team.

Catalogue Refresh Requirements

NHS Supply Chain are continually making changes and updates to product information. It is therefore critical that the most recent product information is available to you.

There are two ways that a customer's third party system or catalogue intermediary can do this:

1. **Punching out:** Using this method, the system will 'punch out' to our Online Ordering system to create a basket, which is then exported back in their own system to process an order

2. **Catalogue download:** This method will require a customer third-party system to load a version of the NHS Supply Chain catalogue. We currently offer an integrated service to "push" catalogue updates to P2P systems to assist them with passing on the most current product information.

Examples of third-party systems include Edge4Health, Virtual Stock, @UK and GHX.

If the third-party system is unable to make use of this service, customers need to perform manual catalogue updates. Manual processing relies on someone checking daily to see if an update is required and actioning that update. As such, there are instances where these updates can be missed for a period of time. This can result in a number of common customer problems.

Common catalogue refresh problems:

- Products and pricing in the third-party system can be out of date, resulting in price discrepancies between the price seen at point of order and the price charged by suppliers.
- The NCP codes sent with an order may have been delisted since the last catalogue update was done, resulting in rejected orders post checkout.
- Lead times shown at point of ordering can be out of date, leading to your delivery expectations not being met.

The pushed catalogues can be tailored to meet needs (different transmission periods, national and regional and full or delta feeds).

If third parties require assistance with moving to the API update service, we are happy to help. Please do get in touch with our Customer Service Helpdesk if there is something you wish to discuss further.

Our Customer Service Helpdesk is available by phone via 0845 680 4357 or email to cshelpdesk@supplychain.nhs.uk

Customer Contact Details

When an order is placed, we use the customer contact details set up in our Online Ordering system as the first point of contact to send any relevant order. This can include order receipts, management of minimum order thresholds, delivery estimates, and order cancellations.

Supply Chain Coordination Limited (NHS SUPPLY CHAIN) is the Management Function of NHS Supply Chain

Registered in England No: 10881715. VAT No: 290 8858 54 Registered Office: Skipton House, 80 London Road, London, United Kingdom, SE1 6LH

If the customer contact detail held in the Online Ordering system is missing or is invalid, we revert to the regional contact details held in another database. This results in all communications being sent to the 'regional primary contact'. In most cases this will be a central inbox and will be different from the person who placed the order.

It highly beneficial that you maintain your own contact details through the NHS Supply Chain Online Ordering system, whether you use the service or not.

For more information on our online ordering system, please contact our Customer Service Helpdesk by phone via 0845 680 4357 or email to cshelpdesk@supplychain.nhs.uk

Order Tracking

The NHS Supply Chain Online Ordering system can be enabled to run in parallel to any third-party procurement system you have configured. Order progress and status can be tracked via the Online Ordering System. It can only track an eDirect order progress up to the point the supplier informs us that the order has been dispatched.

If an eDirect order is being delivered by a courier and tracking information is available, a link is shown below the order reference number and above the order details in the list of orders. You can use this link to go to the courier's website and see tracking details.

If you have recorded a batch or serial number for the order or for selected products, these are displayed as shown below.

View order

Local reference	Local reference notes show here		Notes	eDirect header notes show here
Requisition point	DZ6055 CATHETER LAB - CARDIOLOGY			
Delivery address				
Created by	Julie Pettit 08/04/2021 08:14:31			
Checked out by	Julie Pettit 08/04/2021 08:14:31			
Authorised by	Julie Pettit 08/04/2021 08:14:31			

Order reference number	17954W	Earliest delivery date		Order type	e-Direct

NPC	GTIN	Description	Qty	Qty sent	Delivery date	Trust status	Supply chain status	Purchase order number	Comment	Line value
AAR503		Frappe Mocha frappe mix 2kg Notes: eDirect line notes show here	1	0		ORDER SENT	FINANCIAL CODED			

Total

[Print] [Export] [Create new order from this order] [Create favourite from this order]

For further information, see our Online Ordering Guide at: https://www.supplychain.nhs.uk/userguides

eDirect Suppliers with a Minimum Order Value

Some suppliers have a Minimum Order Value (MOV) in place. NHS Supply Chain agree to these as they provide our customers with lower unit costs. In order to maintain the great deals, we negotiate, our suppliers need to operate on supply at larger scales. This means that they can lower operational costs which reflect in a lower unit cost rate.

If while entering an order, the value of the products in a customer order does not equal or exceed this minimum threshold, the products for that supplier will be cancelled from the order. A cancellation email is sent to the contact on the Online Ordering account.

If using a third-party ordering system (such as a P2P or S2P system) and have not enabled NHS Supply Chain's Online Ordering system in parallel, the email will be sent to the regional primary contact point. See the 'Customer Contact Details' section for more information.

We work to reduce and challenge MOV's wherever possible. For some suppliers it is not financially viable for them to process very low value orders without an increase in operational cost. This cost would then be passed on to our customers. As such, it is likely that MOV's will always have a place when ordering.

Some data shows that many cancelled orders relate to extremely small value order attempts e.g. under £5. Where possible, we would encourage processes, training and understanding of Minimum Order Values to those raising orders within the trust.

A current list of suppliers with MOV thresholds is available on our website. All orders need to meet or exceed the stated amount. Please note, you will need a website login to access the list online here:
https://www.supplychain.nhs.uk/programmes/service-improvements/edirect-in-focus-a-project-designed-to-enhance-capability/edirect-minimum-order-values/

Order Cut Off Times

As part of the process of becoming an NHS Supply Chain provider, Service Level Agreements are agreed when signing procurement contracts. These include agreements on delivery lead time performance to our customers. NHS Supply Chain monitor service levels to ensure that our customers are receiving the optimal service.

Suppliers require a deadline, or 'cut off' time, to receive the final orders. These orders cut off times provide suppliers with adequate time to process the orders in the most cost efficient manner and meet the agreed service levels.

NHS Supply Chain systems are therefore configured to ensure that orders are sent to suppliers in order to meet their required order 'cut off'.

Most suppliers need to receive the order by 4.30pm for next day deliveries, however transferring the order to us by 1pm will hit all eDirect order cut off times. We advise requisitioners to time any eDirect orders send or batch to at least 15 minutes before the cut off.

Please note that this is depending on the internal P2P system configuration. For example, some P2P systems are configured to batch send customer's orders to NHS Supply Chain at a specific frequency, or once per day. This internal batching process can delay eDirect

orders processing. Sometimes customers assume that NHS Supply Chain has delayed eDirect order when their own system delayed the send to us.

Speak with your IT team and check that your P2P system is correctly configured to batch send your orders at the appropriate time.

Returns

Any eDirect returns will need to be sent back to the supplier and not NHS Supply Chain. While we cannot accept or process these stock returns, your NHS Supply Chain Customer Services Advisor will be happy to assist you when dealing with eDirect product returns.

Please be aware that eDirect suppliers may levy a charge for the return or restocking of an item. Any additional costs that would be incurred will be discussed and advised prior to collection being made.

There are some products that are non-returnable:

- **Licensed Medicinal Products (LMP)** – We cannot accept returns for resale of products classed as LMP due to the restrictions placed on us by the MHRA and EU regulations for the Wholesale Distribution of Medicines for Human Use.
- **Non-returnable product** – We have a number of products which are non-returnable. These include some consumable items, including paper and some high value products.

Your Customer Services Advisor will advise you if a product is not returnable and will help you to redistribute the product(s) within your trust.

Invoicing

NHS Supply Chain's pricing is fully inclusive of all costs; picking, packing, transhipment, containment, delivery and customer service. There are no hidden or additional charges. Prices also include VAT so the price you see in the catalogue is the same price you pay on your invoices.

Consolidated invoices

With eDirect, our suppliers will invoice NHS Supply Chain on confirmation of dispatch of the item. We will check the invoices for any unexpected charges that have inadvertently been included. If you see a delivery charge on an eDirect delivery note, please be assured that this **charge will not be passed on to you as a customer**. We have internal processes to identify and remove any invalid delivery charges.

NHS Supply Chain will then consolidate these costs with other orders, processing a consolidated invoice which is sent on to our customers. The consolidated invoice is then processed through by your finance team and systems as per agreements we have reached to manage this process. For further information on this, please reach out to your Finance Team.

Invoice Line Detail Report

You will have access to download the Line Detail Report, either from NHS Supply Chain's Billing website or from TR21 in report suite hosted on the NHS Supply Chain website and filter to display orders they wish to view the order level invoice details for.

The invoice can be viewed in two ways:

- A single page PDF invoice detailing the total sales values for the week
- An Excel Line Detail Report detailing every individual transaction within the week that makes up the consolidated invoice.

Back Order Management

What is Back Order Management?

Back Order Management, or Order Line Level Management, occurs if a supplier is unable to fulfil an order within the advertised delivery dates.

How will I know it my order is subject to Back Order Management?

- A supplier is unable to fulfil your order in full or within the advertised delivery dates.
- Supplier informs NHS Supply Chain which items need to go on back order and when the items are expected be back in stock.
- NHS Supply Chain Customer Services adjust your order for the items placed on back order.
- NHS Supply Chain Customer Services will advise you of this change via an email. It will be sent either to the user who placed the order through our online ordering system, or to the nominated contact on the account.
- NHS Supply Chain will retain your specific order references for items put on back order, based upon the information provided by the supplier. We will resend the order for the unavailable items on your behalf.

Three Way Matching

NHS Supply Chain standard invoice process is a single consolidated weekly invoice for all purchases. Therefore, a single individual invoice per order required to undertake a three way match is not currently available.

This issue links closely to the ability to receipt, as to undertake a financial three way match you will need to be able to receipt any order generated by either NHS Supply Chain ordering applications or Oracle based third-party purchase to pay (P2P) systems are not able to be receipted.

NHS Providers that use non-Oracle based P2P systems can receipt which provides a two way match between PO and GRN but are challenged with undertaking the final match from a single weekly consolidated invoice.

NHS Supply Chain can confirm that the systems are operating as designed. There are currently no plans to introduce individual invoicing at a category or device allocation level. The two solutions detailed below are the only options to provide individual invoicing for a complete financial three way match.

What you can do:

1. **Use the Invoice Line Detail Report** – This provides the invoice details for any order requiring a three way match and enables a user to check correct invoice details per order against a PO [and with a GRN] complete a three way match.

2. **Enable NHS Detailed Invoicing** – NHS Supply Chain can enable individual invoices per order as it provides this for certain customer types already (cross border NHS organisations (NHS Wales and NHS Supply Chain Scotland) and private sales accounts. This is known as NHS Detailed Invoicing. However, the individual order per invoice is only able to be enabled at a specific NHS Provider account level. This means that you would receive an individual invoice for every order you place with NHS Supply Chain and this could be thousands of orders per week across all products.

The setup of a secondary account (district) with NHS Supply Chain specifically for HCTED orders and having that operate with NHS detailed invoices allows the primary account to be set to remain a consolidated invoice and the secondary HCTED only account to be set for NHS Detailed Invoices. This has been deployed with some NHS Providers to date with varying levels of success.

Receipting

NHS Supply Chain, and our ordering applications, operate on a business to customer model. This is where all orders are presumed delivery and positively receipted (100% Goods Received Note / GRN). There is therefore no receipting functionality built into the applications.

The exception to this is our eDC Gold inventory management system. This application has a receipting function used to adjust stock levels and improve stock management for clinical products.

Specific Oracle-based third-party systems were developed to replicate the NHS Supply Chain business to customer model. These systems include Shared Business Services (SBS), North East Patches (NEP), and Patech. These systems positively receipt all orders following transmission due to the .cXML order transmission type. This differs from direct to supplier ordering where PDF orders are not sent electronically via the .cXML format, and therefore remain open for receipting.

Unfortunately, this is not an issue NHS Supply Chain alone can resolve as these systems have been procured and are managed by our customers own Finance and IT teams. Also, this is how our P2P systems are built to operate.

We can confirm that our systems are operating as designed. We will continue to review the service and identify which technical, process or business transactional model developments we can make in the future.

How to improve current receipting
NHS Supply Chain applications
Implement a robust process for checking received deliveries and report any errors to NHS Supply Chain for rectification. This should be in place as a matter of best practice for NHS Supply Chain orders generated by online ordering or eDC.

Use an internal third-party P2P system to order via NHS Supply Chain which will provide receipting functionality. Please note, this is unless it is an Oracle-based application such as EROS, Powergate, Cedar eFinancials, etc. third-party Oracle systems:

1. **Request a development** from your contracted system provider **to enable configurable receipting** based on the product, category, flag, etc. This is different to the order transmission type which currently dictates logic in Oracle.
2. **Enable receipting for all orders and transmission types in your systems**. This will result in all orders from NHS Supply Chain requiring receipting and all payments being held until completed.
3. **Set up a secondary account (aka district) with NHS Supply Chain specifically for HCTED orders**. This allows the primary account to remain positively receipted for the bulk volume orders and the secondary account to be set for receipting NHS Supply Chain orders.

Additional Charges

On occasion, we may seek to recover any additional costs incurred via an exceptional delivery request or an eDirect product return to supplier. Examples of typical additional charges:

- Additional third-party delivery charges, such as to cover a courier cost.
  - For a standard delivery and lead time there should be no additional costs. The catalogue price is the price.
  - The only additional costs would be pertaining to a pre 12pm and pre 9am same day, or Saturday guaranteed delivery.
  - Some of these can be set up as a product to order through the catalogue, others need to be requested and individually priced via customer services request.
- Returns charge in relation to an eDirect product.

For occasions incurring a third-party charge, for example, the use of a courier company, we would look to recover the actual cost invoiced to us. This means that the cost will be directly passed on to you, we will not add any additional charge.

In any event, any additional charge arising will be advised and your approval sought prior to proceeding. Additional charges do not apply when responding to a major incident or critical clinical or medical requirement.

Issue Referral Process

Should you have any queries relating to your order, our Customer Services team are happy to help you. Please report delivery issues to Customer Services within the following timescales:

- **Error relating to the number of containers delivered** – At the point of delivery to the driver when signing the delivery documentation.
- **Order discrepancies** – At the earliest opportunity and within a maximum of three working days from the delivery being made.
- **Out of hours deliveries** – Where the delivery is made outside of normal working hours and there was nobody available to sign for it, the delivery must be checked at the earliest opportunity. Any errors relating to container quantities or quality must be reported by 10am the following morning to Customer Services.

When contacting our Customer Services Team, you will be asked to provide the following information to enable us to deal with your query promptly:

- **Requisition number** – This is your unique customer reference number allocated to you when you place each new order with us.
- **Requisition point** – This is your unique account number, specific to your department, which helps our team to identify the specific order point for each product.
- **Catalogue product codes** – These are unique codes allocated to each product within our catalogue. We often refer to these as National Product Codes (NPCs). Please ensure that you have each code and quantity to hand.

Our team will then issue you with a call log number. If your order was incomplete, missing items will be sent on the next available delivery day. A credit will be raised for the original items, pending the outcome of our investigations.

If you wish to follow up on a call logged with Customer Services, please quote the call log number to enable easy identification of the call details.

For further information on eDirect, including the transformation work and frequently asked questions, please visit:
https://www.supplychain.nhs.uk/programmes/service-improvements/edirect