

**Standard Operating Procedures**

**Education and Development**

**Financial Procedures**

May 2025

**Document Profile**

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| **Author(s)** | Claire White |
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# Introduction

The following procedures have been developed to enable clear and transparent processes regarding financial transactions and information sharing between Family Nursing & Home Care (FNHC) Education & Development (E&D) and Finance Departments.

# SOP 1 External Course Bookings

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| ***Purpose*** |

This procedure will set out arrangements to ensure E&D and Finance are aware of expectations and responsibilities of the E&D team to ensure that payments for external training and courses are appropriately managed and recorded.

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| ***Scope*** |

This SOP refers to any course/training/conference provided by an external supplier which requires payment and may or may not require additional resources i.e. travel/accommodation costs etc.

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| ***Core Requirements/Procedure*** |

**Standard Process**

E&D ‘application for funding’ forms to be submitted and approved (as per E&D SOPs).

The completed and signed application form which details estimated costs will be sent to Finance.

E&D will keep a record of each application on Assure and a separate spreadsheet.

E&D will request invoices directly from suppliers where possible. Alternatively

E&D will request a Purchase Order form from Finance (upon request from the supplier). E&D will send Purchase Order (from Finance) to supplier where requested.

Invoices are usually sent directly to finance following receipt of Purchase Order. E&D will forward any directly received invoices to Finance for payment.

E&D will forward any further communication regarding invoicing/payment to Finance for their response (where Finance have previously been provided with approved funding form and invoice).

Finance will provide E&D with a list of transactions on a monthly basis which will be checked against E&D spreadsheet to reconcile (actual vs estimated costs)

**Credit Card Payments**

Where invoices cannot be provided or where only debit/credit card payments are accepted E&D will complete a Credit Card payment request.

As a last resort where there is a short notice/urgent need for credit/debit card payment that cannot be processed by Finance, the employee may be asked to complete the payment if possible and complete an Expenses form. This must be agreed in advance with E&D and must be in line with costs agreed on application for funding.

**Degree/longer term payment commitments**

The total or modular course fees will be provided on the ‘application for funding’ form and shared with Finance as above.

The approximate timeframe of completion of the course will be provided, however, this may vary depending upon the supplier/candidate. Part/whole payments requested through E&D will be shared with Finance as above (if requested through E&D).

Education progress will be monitored by line managers

E&D will update their spreadsheet when reviewing transactions shared by Finance on monthly basis.

# SOP 2 FNHC Education and training delivery booking and payment management

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| ***Purpose*** |

Eventbrite will be used to manage all E&D training provision. This will allow payment to be made upfront and supports booking management.

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| ***Scope*** |

All training and education delivered by FNHC will be managed through Eventbrite. This includes: the annual FNHC conference; all courses for both FNHC staff and external candidates; courses that do not attract a fee (i.e. internal courses only); and courses that require payment from external candidates.

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| ***Core Requirements/Procedure*** |

Eventbrite account linked to E&D email account.

Courses to be uploaded to Eventbrite by E&D.

E&D to set up courses where appropriate to enable:

* FNHC staff to access free of charge
* course fees to include Eventbrite admin fee (‘absorbed’) (Course prices agreed March 24)
* conference event and booking fee to be added separately

Hyperlinks for courses for FNHC staff will be uploaded to People First in the Learning Zone.

Hyperlinks for courses available to the public will be uploaded to FNHC website.

Refunds for courses will be available up to 7 days before the course date, if course cancelled within 48 hours an alternative date will be offered where available.

Payment is made directly into FNHC account one working day following the date of the course.

E&D will send Finance an Eventbrite finance report weekly.

All course payments should be made via Eventbrite. FNHC will no longer offer invoices for training and education.

# SOP 3 Purchases – Equipment/refreshments/etc.

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| ***Purpose*** |

There will be a clear process for the purchase of low-cost equipment/supplies/refreshments etc.

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| ***Scope*** |

This SOP applies to general supplies of office type equipment and supplies associated with the delivery of training and education. It does not apply to any medical device or clinical equipment requests which must follow the separate SOP.

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| ***Core Requirements/Procedure*** |

Requests for the following will be made via FNHC Stores for the sourcing and ordering of:

* dry goods
* fresh fruit
* office supplies
* stationary

Where lunch is provided for course attendees, sandwiches will be ordered through a local catering company and an invoice will be requested for payment (the cost of refreshments/lunch is factored into course costs agreed March 2024).