

EFM Minor Works – User Guide for Estate Managers

1. Introduction

The estates manager's journey into the EFM Minor Works portal begins after they are contacted by EFM with an email inviting them to register. This email contains a link to our portal where the [Estates Manager Registration Form](#) can be found. Users should save the link to this page or add as a bookmark in their browser for easy access in the future.

2. Estate Manager Registration & Supplier Onboards with EFM

The estates manager will need to forward the link they have received to any suppliers that will be required to onboard with EFM. Once the estates manager has directed the supplier to our portal, the supplier will be asked to complete the [Supplier Registration Form](#). This form will provide EFM with the information needed to onboard the supplier into the framework. The supplier will also upload insurance documents which will be checked by EFM to ensure compliance.

After final checks are complete, the supplier will be notified via email that they have been successfully onboarded. The supplier should then notify the relevant estates manager that they are onboarded to EFM framework.

In the meantime, estate managers will follow the link provided by EFM and will be asked to complete the [Estates Manager Registration Form](#). This form will ask for minimal contact information and users will need to accept Call-Off terms and conditions. The steps to correctly fill out the form are outlined below:

Filling out the Estate Manager Registration Form:

- The estates manager is asked to fill in **contact details** including their first name, last name, email address, job title and phone number.
- There is then an option to select the **NHS hospital** they work for. This comes in the form of a drop-down box and the chosen NHS should be the one needing minor works.
- Before submitting the form, the estates manager must tick a box by which they confirm they have read and understood the **Terms and Conditions** of the portal. A copy of this document can be accessed by clicking the available hyperlink within the form. This is also the case for the **Privacy Policy**.

3. Estates Manager Confirmation Email with Portal Login

Once the [Estates Manager Registration Form](#) has been submitted, the estates manager will receive a confirmation email from EFM (check any junk/spam folders). This email will contain a link which directs the user to the portal where the [Works Booking Form](#) can be found.

A follow up email will then be sent within 3 working days containing a username & password that is specific to the estates manager. This will be used to access the [Works Booking Form](#).

If you have any further queries, please get in touch via email at minorworks@everythingfm.org

(Note: The portal is not password protected, the password is purely to access the *Works Booking Form* within the portal.)

4. Estates Manager Contacts Supplier

The next steps for the estates manager after receiving the above confirmation is to contact their preferred supplier to discuss a minor works contract. Once the scope and budget are agreed, the estates manager can use our portal to book the minor works.

(Note: The EFM self-serve portal will not be used for issuing quotes, only to award a contract to the preferred supplier.)

5. Estates Manager Books Minor Works through EFM

After being notified by the supplier that they are onboarded with EFM, the estates manager needs to use the portal to book the minor works. Estates managers can use the link from the confirmation email in **step 3** to access our portal and find the *Works Booking Form*. The steps to completing this form are outlined below:

- After selecting the *Works Booking Form* from our portal, the estates manager will be prompted to enter a username & password. This information was provided in the confirmation email received.
- Once logged in the estates manager will be presented with the *Works Booking Form*.

Filling out the Works Booking Form:

- The estates manager is asked to fill in **contact details** including their first name, last name, NHS Hospital and **NEL Site Name**. This is to confirm which building from the NHS hospital will be undergoing the minor works.
- The estates manager will also be asked to provide the **NHS Trust Procurement Manager & Supplier Contract Email**. These email addresses will be for the personnel who need to receive a copy of the final contract to sign (via eSign) so please make sure it is entered correctly.
- There is then an option to select the **Chosen Supplier**. This comes in the form of a drop-down box containing a list of the suppliers that have successfully onboarded with EFM for the NEL Procurement Collaborative. The estates manager will select the supplier that they have been discussing a minor works contract with.
- There is then an option to select the **Type of Minor Works** which are to be undertaken. This comes in the form of a tick box (where multiple options can be selected) and includes an option named *Other* for more specific jobs than the ones shown initially.
- The estates manager will then provide a **Brief Description of Minor Works** and inform us whether they are going to upload a **Purchase Order or Requisition** document. Once selected, the user will need to provide the document number and an upload of their selected document. **Note:** If the estate manager uploads a requisition, EFM must receive a PO via email within 5 working days. These must be sent to **minorworks@everythingfm.org**

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- They will also need to provide an **Expected Start & End Date** for the Minor Works they have discussed with the supplier; these are simple date fields.

6. EFM Contract and Signatures

After the *Works Booking Form* has been submitted, EFM will review the Purchase Order/Requisition and a contract will be created and emailed for signature (via eSign). This contract will be sent to the NHS Trust Procurement Manager and supplier to sign and will also be counter-signed by EFM.

Once all 3 parties have signed the document, the relevant parties will be notified, and the contract can commence. Using this process means minor works have been procured compliantly and efficiently. (**Note:** Any changes to the contract scope, value, or duration after being signed by all 3 parties must be recorded and emailed to: **minorworks@everythingfm.org**).

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