

## **PROCESS FOR PROVIDING PAPERWORK FOR FUNDING OF APPROVED CPD (LBR) COURSES TO BE PUT IN PLACE**

Once you have received official notification from your operational lead/line manager that funding for your course has been approved, the following process to provide the correct paperwork to [bchc.lbr@nhs.net](mailto:bchc.lbr@nhs.net) for the funding to be put in place with the course provider **MUST** be followed.

1. You are responsible for completing the course providers' booking/application process for the specified course funding has been approved for.

(LBR DO NOT DO THIS FOR YOU)

### **2. Applying for the course:-**

- Complete course providers application/booking form. Save a copy or screenshot and email to [bchc.lbr@nhs.net](mailto:bchc.lbr@nhs.net) along with all details of the company providing the training, i.e. name, address, email, contact name, telephone number, finance contacts, the training course name and link to supplier website if appropriate. Send any email correspondence relating to the course i.e. offer of place and/or confirmed place on course and any pro forma invoice received.
- If a Purchase Order (PO) number has been requested send all above details to [bchc.lbr@nhs.net](mailto:bchc.lbr@nhs.net) A purchase order can then be raised and provided to complete the application form and submit to the course provider.

### **3. Changes original requests i.e. cost, dates, etc**

- If any details of the course change in particular the cost, supplier, date which affects the approved amount/details you must email [bchc.lbr@nhs.net](mailto:bchc.lbr@nhs.net) before completing the booking to ensure the revised details are re-assessed and approved.

### **4. Invoice Payments:-**

The preferred method of payment is via invoice with a Purchase Order. Tick this option when booking your place. Email LBR for finance details if required.

### **5. Payments on line:-**

LBR **do not** hold a credit or purchasing card, therefore no payments can be made this way via LBR.

If the division have a card and are able to book the course online, LBR can transfer the cost, via finance, back to the division on production of copies of all paperwork, confirmation of place on course and receipt of payment. LBR will require the budget holder name and budget code to action this.

## **6. Paid Directly by Individual – THIS IS NOT ADVISABLE METHOD OF PAYMENT**

It is preferred that individuals do not pay directly for courses themselves, as the only way to refund is via expenses when tax will most likely be deducted. If this has however been the way the course has been paid for, the same process as above providing a copy of all paperwork and receipt of payment along with manager/division budget holder name and budget code expenses are paid from, then the division will then be reimbursed the cost to enable the individual to claim back via expenses route.

**Failure to follow process and provide all the required details may result in you being invoiced directly.**

**Your patience is appreciated while the process for the Purchase Order is taking place as this may take a while to come through dependant on various factors.**

**Providing all the correct details in the first instance will ensure a smoother process for all parties involved.**

**The LBR inbox gets extremely busy – your email will be dealt with as quickly as possible. Please refrain from sending multiple emails as this will delay responses.**

Should you have any queries please email [bchc.lbr@nhs.net](mailto:bchc.lbr@nhs.net)