

**DSA QAG**  
**Standard Quote Template**  
**Guidance Notes**

**The following guidance notes relate to the Standard Quote Template to be used by assessors and suppliers when submitting recommendation for supply of equipment and services to the funding bodies.**

**The template consists of four documents which require to be used in conjunction with one another, as follows:**

**Quotation Document 1: Assessors Requirements**

Assessors should use this document to specify all of the equipment and IT setup and awareness training required by the student, before submitting it to three suppliers, to obtain quotes for the items.

**Quotation Document 2: Suppliers Quotation**

Using the information submitted by Assessors on Quotation Document 1, suppliers should either:

- a) Complete Quotation Document 2: Suppliers Quotation and return to the assessment centre.

N.B DSA-QAG Suppliers, if requested by an Assessor to quote for Non Medical Help Training (via Quotation Document 4 below) can use section 1.13 of Quotation Document 2 to respond to any NMH requests

OR

- b) Use their own electronic quotation systems to produce an output similar in format and list items in the same logical format as the template and return to the assessment centre.

**Quotation Document 3: Specialist Suppliers Quotation**

Where a specialist piece of equipment is required for a student which can only be sourced from a limited number of specialist suppliers, it may be that it is not practical to obtain a quote from three suppliers. In such circumstances, assessors can use Quotation Document 3: Specialist Suppliers Quotation to obtain a specialist supplier quote. The assessor can source the quote and complete Document 3.

#### Quotation Document 4: Non Medical Helper Training

Where as part of a Needs Assessment Report there is a requirement identified for the provision of Non Medical Help Training, the Assessor should complete Template 4 and send to the appropriate organisations e.g. DSA-QAG Suppliers, Higher Education Institutes, and Specialist Non Medical Help Training Providers.

*It is the responsibility of the Assessor to assimilate Documents 1 and 2 in all cases and Documents 3& 4 if appropriate, and submit to the funding body.*

**There is one other document which has been issued for use as a guidance / reference document and that is the Specification matrix.**

#### Specification Matrix

To assist Assessor's with completing the new standard quote Assessor's Document 1, a Specification Matrix for Laptop and Desktop selection accompanies the Standard Quote Process. The Specification Matrix was compiled by the Suppliers Working Group Representatives who attended the Standard Quote Workstream, in liaison with all DSA-QAG the Suppliers. It was proposed by the Standard Quote Workstream which involved your representatives taken from the Assessment Centre Working group and SFE that the matrix was a useful tool.

The purpose of the Specification Matrix is to act as a guidance tool for Assessors who may wish to use the matrix as a guide to determine the specification of computer equipment to be requested in student quotes. A process is currently being put in place to maintain and update this matrix on a regular basis, details on the membership of this group and frequency will follow.

For clarification, for those Assessors who prefer no to use the 'model' of equipment as per the Specification Matrix (A,B or C), the 'model' is not the name of a manufacturer (Toshiba, Dell etc) which may have led to some confusion. As we all know, DSA-QAG suppliers carry different 'manufacturer' model of equipment, none the less all QAG Suppliers can supply equipment as requested in student quotes.

## Guidance Notes

### Quotation Document 1: Assessors Requirements

This document is to be used by assessors to specify equipment and training requirements. It should be submitted to three suppliers to obtain quotes.

Suppliers should respond to the specification detailed in Quotation Document 1 by completing Quotation Document 2.

It is acceptable (and Optional) for the Assessor to delete any unused sections within the Assessors: Document 1 reducing the size of the quote document to be inserted or appended in the NAR.

The document is broken down into the following sections:

#### 1.1 Background Information

- The Assessment centre information section should be completed with the background details of the assessment centre, assessor, student and funding body. If the assessment centre uses a reference number for each student, enter under student assessment centre reference number (optional).
- The total maintenance and support period should cover the length of course remaining as specified.
- Suppliers should take the standard one year manufacturers' warranty into consideration when quoting for this cover.
- The insurance period should cover the remaining duration of the course as specified.

## 1.2 Laptop

- This section of the template should be completed if a laptop is required by the student.
- Assessors should specify whether a laptop or specific Apple laptop is being recommended.
- The model of the laptop or Apple laptop should then be specified.
  - When specifying the Apple model, assessors should state whether dual boot or parallels are required.
- The latest version of the appropriate operating system will be supplied, unless stated otherwise.
  - Where a different operating system is required, assessors should specify this under operating system.
- The standard screen size of 15"-15.6" should be provided unless stated otherwise.
  - Alternatives include, 12"-13" and 17" and if one of these options is required, assessors should specify alternative size, if appropriate.
- When a laptop is selected for a student, a package of standard items will be provided. (Package includes: External Keyboard, External Mouse, Laptop Stand, Surge Protector 4 Way, 4 Way USB Hub Powered).
- If a specific type/brand of any of the package items is required, assessors should specify this in the column next to the item.
- There are also additional items to accompany a laptop which do not come as standard and assessors should specify if these are required.
  - The specific type of carry case if required should be detailed e.g. rucksack or brief case style.
- The Additional Special Requirements line allows assessors' to specify any variances relating to the students' needs.
  - Examples of such requirements might include: lightweight laptop, laptop with 4 USB hubs.

### 1.3 Desktop

- If a desktop is required by the student, this section of the template should be completed.
- Assessors should specify whether a PC or Apple desktop is being recommended.
- The model of the desktop should then be specified.
  - When specifying the Apple model, assessors should state whether dual boot or parallels are required.
- The latest version of the appropriate operating system should be supplied unless stated otherwise.
  - Where a different operating system is required assessors should specify this under operating system.
- The monitor size required for the desktop should be specified in the corresponding line of the template.
- A package of standard items to accompany a desktop has been included in the template. (Package includes: Keyboard, Mouse, Surge Protector 4 way, Speakers).
- If a specific type of these items is required, this should be specified in the column next to the item.
  - Speakers are included as part of the package, but should the desktop come with built in speakers, these will not be provided.
- Any additional items, which are not included in the package, should be requested in the Additional Items to Package section.
- If there are any Additional Specialist Requirements these should be specified in the space provided at the end of the desktop section.

### 1.4 Software

- The rows in the Software section have been left blank to allow assessors to list the pieces of software required.
  - Any particular versions of the software required should be specified. The latest version of the software will be provided unless stated otherwise.

### **1.5 Printer/Scanner**

- Assessors should specify which type of printer and/or scanner is required and also if the outputs should be black and white or colour.
- A USB cable and a starter pack of paper will be provided as standard. If these items are not required or another item is required in its place, assessors should specify this in the column next to the item.
- Any additional items to accompany the printer/scanner should be specified under the Additional Items to Package.

### **1.6 Digital Recorder**

- Assessors should specify which type of digital recorder is required.
- A package of standard items to accompany the digital recorder has been included and if a specific type of these items is required this should be specified in the line next to the item.
- If any additional items are required for the digital recorder these should be specified in the Additional Items to Package line.

### **1.7 Ergonomic Equipment and Input Devices**

- The rows in the Ergonomic Equipment and Input Devices section of the template have been left blank for assessors to list their requirements.

### **1.8 Equipment for Hearing Impaired Clients**

- Specialist pieces of equipment that are required for hearing impaired clients should be listed in this section of the template. The rows have been left blank for assessors to specify what is required.

### **1.9 Equipment for Visually Impaired Clients**

- Assessors should specify any pieces of equipment that are required for clients with a visual impairment in this section of the template. The rows have been left blank to allow assessors to specify what is required.

### 1.10 Additional Items

- Any additional items required, which are not covered by the categories provided, should be requested in this section of the template.

### 1.11 Delivery, Set Up and Familiarisation

- The assessor should choose the type of delivery, set up and familiarisation most appropriate for the student's needs. Standard delivery and on site assembly lasts up to 1.5 hours and extended delivery lasts up to 2 hours.
- In certain circumstances, a time period in excess of 2 hours may be required for delivery and on site set up. In such cases this should be requested as a training requirement in the training section of the template (**section 1.12**).
- Where the student is using their own equipment, the assessor has the option to request a "Health Check" to ensure that the existing equipment is fit for purpose and compatible with any additional equipment requested.

## Quotation Document 2: Suppliers Quotation

Suppliers must use this document to quote for the items requested by the assessor in Quotation Document 1: Assessors Requirements, before returning it to the assessor. Suppliers who wish to use their own internal systems to produce the quote must ensure that the quote is produced in the order laid out in Quotation Document 2.

Please note: If Suppliers have been asked to quote for NMH by an assessor (via Quote Document 4) for a student they are providing an equipment quote, the supplier can combine the quote in this Document.

### 1.1 Background Information

- The assessment centre background information section should be completed with the background details of the assessment centre, assessor, student and the optional assessment centre reference number (if supplied by the assessment centre).
- The supplier information section should be completed with the details of the supplier company, company address, contact name and the supplier quote ID number as generated by the supplier (if applicable).
- The supplier's DSA QAG Accreditation Certificate Number should be provided, this number can be found on the certificate and will confirm to SFE/funding body that the supplier is QAG accredited. The date the quote is submitted to the assessment centre should also be provided.
- Length of course remaining must correspond to the information detailed in Section 1.1 of Quotation Document 1, received from the assessor.
- Total maintenance and support period should cover the length of course remaining. The standard one year manufacturers' warranty should be taken into consideration when quoting a price for this cover.
- Insurance period should cover the duration of the course remaining.
- The cost of maintenance and insurance should be quoted both excluding and including VAT.

## Sections 1.2 – 1.11

- The description column of the above sections should be completed by specifying exactly which piece of equipment the supplier would recommend to match the assessor's request, detailed in the corresponding section of Quotation Document 1.
- The cost of each item excluding and including VAT should be provided.

### 1.12 Total Cost of Equipment Quote

- The total cost of the equipment quote, including the warranty and insurance required should be provided in this section. Costs should be provided both excluding and including VAT.

### 1.13 Training Description

- If the supplier of the equipment has been asked to submit a quote for Non Medical Help (NMH) training via Quotation Document 4: NMH Training, this section of the template should be completed.
- The training that the supplier recommends and the related timings should be specified in this section and should be consistent with the requests made by the assessor in section 1.12 of Quotation Document 1.

### 1.14 Total Cost of Training Quote

- The costs related to training should be kept separate from the costs of the equipment and should be detailed in this section of the template.
- The cost of training should be provided both excluding and including VAT.

## Quotation Document 3: Specialist Supplier Quote

Where a specialist piece of equipment is required for a student which is only available from a limited number of suppliers, it may not be necessary to obtain three quotes.

In such circumstances, assessors should use Quotation Document 3 to obtain a specialist supplier quote. The assessor can source the quote and complete the document.

### 1.1 Background Information

- This section of the template should be completed with the name and contact details of the specialist supplier.
- The assessment centre background information section should be completed with the background details of the assessment centre, assessor, student and the optional assessment centre reference number.
- The supplier information section should be completed with the details of the supplier company, company address, contact name, the supplier quote ID number as generated by the supplier (if applicable) and the date the quote is prepared by the assessment centre.

### 1.2 Specialist Items

- The assessor should detail which specialist items are required in this section of the template.
- Any additional information provided by the supplier should be detailed in the suppliers description column.
- The cost of the item, provided by the supplier, should be detailed, both excluding and including VAT.

### 1.3 Total Cost of Specialist Quote

- The assessor should provide the total cost, excluding and including VAT, in this section of the template.

## Quotation Document 4: Non Medical Helper Training

Where there is a requirement to provide Non Medical help to the student, the assessor should complete this document and sent it out to the appropriate organisations e.g. DSA-QAG Suppliers, HEI or specialist Non Medial Help Training Providers. A minimum of 2 quotes are required unless the HEI has an existing contract / partnership in place (and has informed SFE about this) whereby only one quote is required.

### 1.1 Background Information

- The assessment centre background information section should be completed with the background details of the assessment centre, assessor, student and the optional assessment centre reference number.
- The supplier information section should be completed with the details of the supplier company, company address, contact name, the supplier quote ID number as generated by the supplier (if applicable) and the date the quote is prepared by the assessor.

### 1.2 NMH Training Required

- The type of training required by the student should be specified in this section of the template and the number of hours required.
- The cost of the item, provided by the supplier / HEI / Other Trainer, should be detailed, both excluding and including VAT.

### 1.3 Total Cost of NMH Training Quote

- The assessor should provide the total cost, excluding and including VAT, in this section of the template.

*Assessors should check supplier quotations against the specifications detailed in Document 1.*

*The following should be forwarded to the funding body for approval:*

*Quotation Document 1: Assessors Requirements;*

*Quotation Document 2: Suppliers Quotation;*

*Quotation Document 3: Specialist Supplier Quote (where applicable).*

*Quotation Document 4: Non Medical Helper Training*