

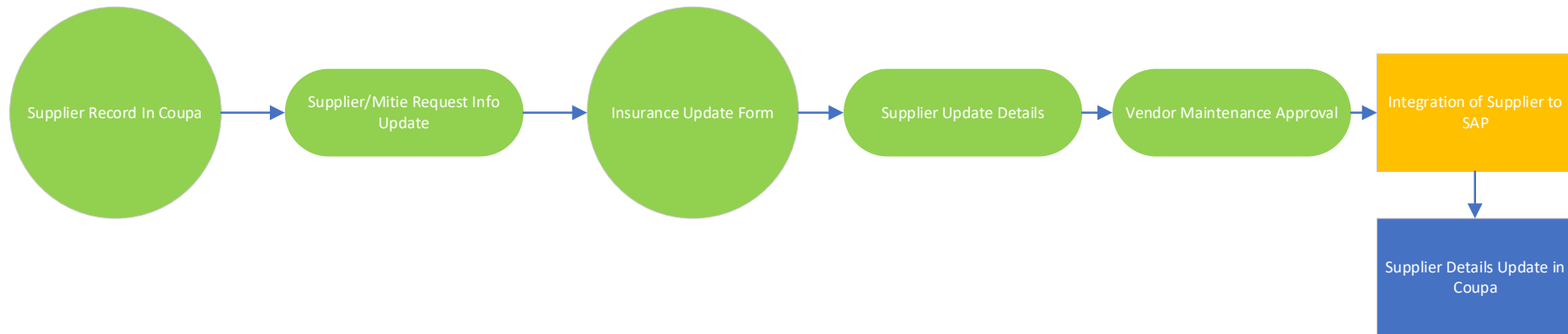


DSP – Supplier Onboarding

How to update insurance details as a supplier

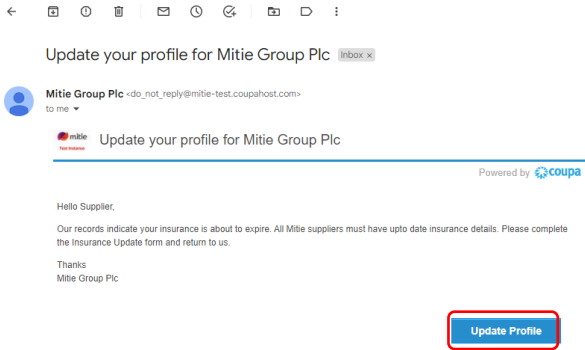
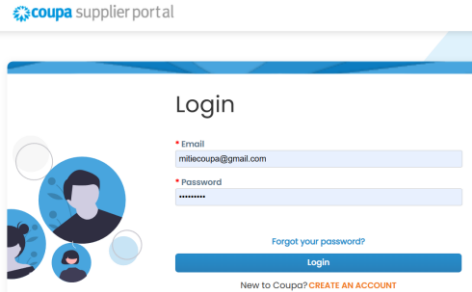
This tutorial will help you to update your insurance details using the insurance Update form:

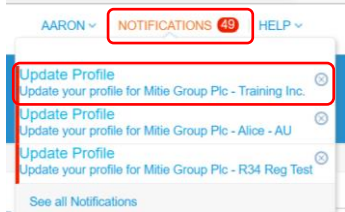
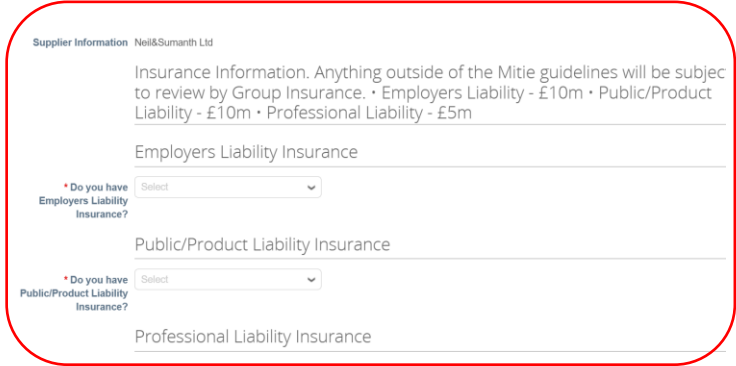
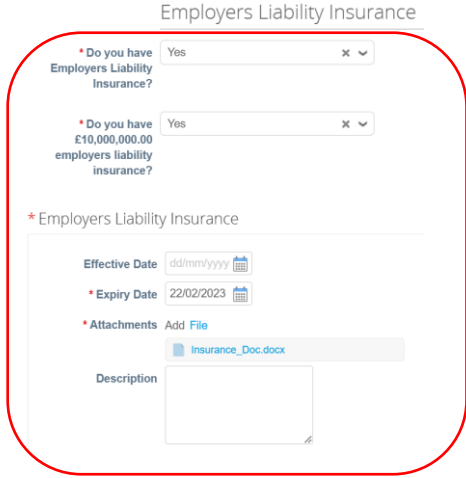
1. How to request insurance details update
2. How you will know you have received the insurance update form
3. Completing the insurance update form and submitting.
4. How you know your insurance details have been updated.

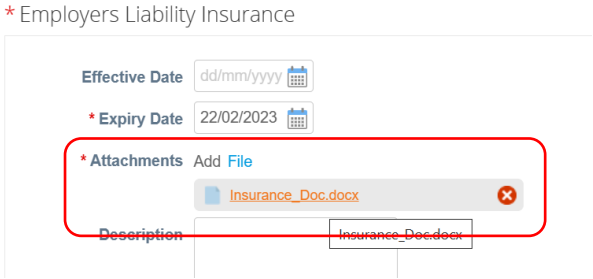



How to update your insurance details using the Insurance Update form in the Coupa Supplier Portal (CSP)

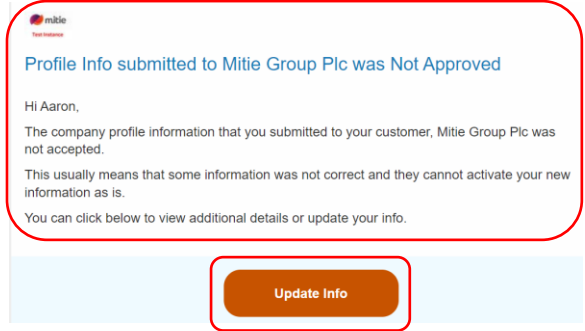
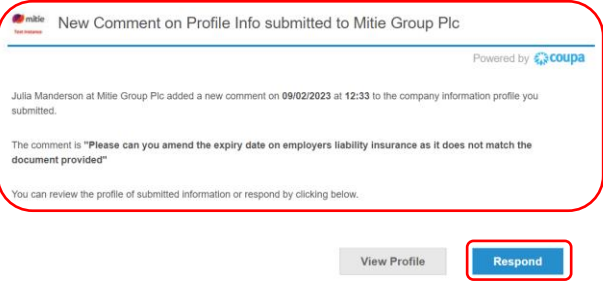
Mitie use Coupa to onboard new suppliers as well as to maintain and amend existing Supplier details. This training script assumes the supplier is already onboarded and Mitie have a record of the insurance details.

<p>1.</p>	<p>Insurance Updates</p> <p>All suppliers onboarded to Mitie must provide insurance details. There are Employers Liability, Public/Product Liability and Professional Liability. Mitie keep a record of these insurance and expiry dates. If one of your insurances is about to lapse, Mitie will send a request asking for updated details.</p> <p>Alternatively, if you wish to contact Mitie so request an update your insurances, please email supplier maintenance (supplier.maintenance@mitie.com) requesting they send an insurance update form. Supplier Maintenance will respond to your email confirming.</p> <p>Only suppliers who are fully onboarded can update their insurance details.</p> <p>If the supplier is in progress or not onboarded to Coupa, this must take place first. This training material assumes the supplier is fully onboarded and available in Coupa</p>	
<p>2.</p>	<p>You will receive an email requesting you to update your insurance details which will prompt you to login to the Coupa Supplier Portal (CSP)</p> <p>Click on the Update Profile button to be re-directed to the CSP to login.</p>	
<p>3.</p>	<p>Login to the Coupa Supplier Portal</p> <p>The login details will be the details you used when you originally logged in to the CSP.</p>	

<p>4.</p>	<p>Under the Notifications section, a notification will be visible requesting an update to your profile. Click on the notification.</p>	 <p>A screenshot of a user profile page. At the top, there is a navigation bar with 'AARON', 'NOTIFICATIONS 49', and 'HELP'. Below this, a notification is displayed with the text 'Update Profile' and 'Update your profile for Mitie Group Plc - Training Inc.'. There are three other similar notifications listed below it, and a 'See all Notifications' link at the bottom.</p>
<p>5.</p>	<p>The Insurance update form will be displayed for you to change your details.</p>	 <p>A screenshot of the 'Supplier Information' page for 'NeilSumanth Ltd'. It shows the 'Insurance Information' section with a warning: 'Insurance Information. Anything outside of the Mitie guidelines will be subject to review by Group Insurance. • Employers Liability - £10m • Public/Product Liability - £10m • Professional Liability - £5m'. Below this, there are three sections: 'Employers Liability Insurance', 'Public/Product Liability Insurance', and 'Professional Liability Insurance'. Each section has a dropdown menu for 'Do you have' insurance, currently set to 'Select'.</p>
<p>6.</p>	<p>Some of the previous information you have supplied to Mitie will be defaulted in the Insurance Form.</p> <p>For example if you answer yes to Do you have Employer Liability Insurance, the end date and document you originally supplied will be visible.</p>	 <p>A screenshot of the 'Employers Liability Insurance' form. The 'Do you have Employers Liability Insurance?' question is set to 'Yes'. Below this, the 'Do you have £10,000,000.00 employers liability insurance?' question is also set to 'Yes'. The 'Employers Liability Insurance' section is expanded, showing 'Effective Date' as 'dd/mm/yyyy', 'Expiry Date' as '22/02/2023', and an attachment named 'Insurance_Doc.docx'. There is also a 'Description' field.</p>

<p>7. If you are to add new insurance details you must attach a new document and change the expiry date. These must match the insurance documents. If these dates don't math, Mite will reject and ask for an amendment.</p> <p>Mousing over the attachment section will display a red icon where you can delete the old document and add a new one. Please do not submit amended details with the old insurance documents.</p>	 <p>* Employers Liability Insurance</p> <p>Effective Date <input type="text" value="dd/mm/yyyy"/></p> <p>* Expiry Date <input type="text" value="22/02/2023"/></p> <p>* Attachments Add File</p> <p><input type="text" value="Insurance_Doc.docx"/></p> <p>Description <input type="text" value="Insurance_Doc.docx"/></p>
<p>8. Complete the rest of the insurance update document. All the questions are the same for the 3 insurance requirements. Note: If you are only updating one of your insurances, you do not need to attach new documentation or amend end dates on the insurances you are not updating. Simply answer the Yes/No questions and submit.</p>	
<p>9. If you have not previously supplied any insurance details to Mitie, you must complete the form for all 3 insurances. (Liability, Public/Product Liability and Professional Liability).</p> <p>If you have answered No to any of the insurances, you will be asked why. This will be subject to assessment by Mitie Group Insurance</p>	 <p>Employers Liability Insurance</p> <p>* Do you have Employers Liability Insurance? <input type="text" value="No"/></p> <p>* Why do you not have Employers Liability insurance? <input type="text"/></p>

<p>10. If you have answered No to any of the Mitie required insurance limits, you will be asked to state the value of the limit. You must add a numerical currency value. (example - £5,000,000.000). Not having the Mitie guidelines limit will result in assessment from Mitie Group Insurance.</p>	<div style="border: 1px solid red; border-radius: 15px; padding: 10px;"> <p>* Do you have £10,000,000.00 employers liability insurance? <input type="text" value="No"/></p> <p>* Please state the value of employers liability insurance <input type="text" value="£5,000,000.00"/></p> <p><small>This field must be populated with a numerical entry. Example: £5,000,000.00</small></p> </div>
<p>11. Proof of insurance must be attached. The expiry date must correspond with the attached document of the insurance for will be rejected.</p>	<div style="border: 1px solid red; border-radius: 15px; padding: 10px;"> <p>* Employers Liability Insurance</p> <p>Effective Date <input type="text" value="dd/mm/yyyy"/></p> <p>* Expiry Date <input type="text" value="22/02/2023"/></p> <p>* Attachments Add File</p> <p><input type="text" value="Insurance_Doc.docx"/></p> </div>
<p>12. You must state if any claims have been made against the policy. If the answer is Yes, this may be subject to further assessment from Mitie Group Insurance</p> <p>This process should be repeated for all the insurance details.</p>	<p>* Have there been any claims made against this policy? <input type="text" value="No"/></p>
<p>13. Once completed, click Submit for Approval. You can Save at any time and come back to the form. If you click Decline, Mitie will be informed, and you may be blocked as a supplier.</p>	<div style="text-align: center; margin-top: 20px;"> Decline Save Submit for Approval </div>
<p>14. Once submitted, the insurance form will be sent to Mitie for Review</p>	<div style="text-align: center; margin-top: 20px;"> <p><small>Supplier Information Neil&Sumanth Ltd</small></p> <p>Pending Approval</p> <p><small>Insurance Information. Anything outside of the Mitie guidelines will be subject to review by Group Insurance. • Employers Liability - £10m • Public/Product Liability - £10m • Professional Liability - £5m</small></p> </div>

<p>15. If the insurance update form is rejected by Mitie for any reason, you will receive two emails. 1st email informs you of the rejected.</p> <p>You can login to the CSP via the Update Info button</p>	
<p>16. The 2nd email will be to provide the comments as to why the insurance update form has been rejected.</p> <p>You can go back and forth with Mitie by clicking the Respond button</p> <p>You are also able to login to the CSP to make the required amendments and submit back to Mitie.</p>	
<p>17. Once Mitie approve your insurance updates, you will receive and email confirming the information you have submitted has been approved.</p>	