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Supplier Management & SQM

For Current Suppliers _ 8.5.19

Respond to an Assessment as a Consultant

Procedure

This video will walk you through the process of responding to an assessment as a **Consultant** in ACCO Oracle Cloud.

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Step	Action
1.	Click the Tools tab.
2.	Click the Worklist menu icon.
	Worklist
3.	On the "Worklist: Notification and Approvals" screen, your most recent notifications appear.
	Click the You Are Invited to Respond to Questionnaire link.
	You Are Invited to Respond to Questionnaire UPK Assessment - Consultant (I1004)

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80	ron You Are Invited to Respond to Qu	uestionnaire UPK Assessment - Consultant (I10	04)			Dismiss	li v
Worklist	Details						
	Assignee	Lucy Danielian	Questionnaire Title	UPK Assessment - Consultant	Supplier Suntet Electric	I Company Inc	
My Tasks	From	Jethry Weaker	Procurement BU	ACCO Engineered Systems	Supplier Site		0
	Assigned Date	8/5/19 2:44 PM	Response Due Date		Supplier Contact Lucy Daniellan		
	Expiration Date	964/19 2:44 PM					
	Task Number	200065					
U 9							M
8	Recommended Actions						м
	 Respond to Questionnaire 						
	Instation						
	Invitation						
	Greetings,						
	You are receiving this notification from company ACC in the evaluation process.	CO Engineered Systems Enterprise because you are the contact for supplier Su	nbelt Electrical Company	inc. We have identified your company as one that our organization would like to furthe	r evaluate, and we hope you can provi	de us with information that will be useful	
	Access the questionnaire by following the recommen	ided actions. We look forward to receiving your response.					
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Step	Action
4.	Click the Respond to Questionnaire link.
	Respond to Questionnaire

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and engineered systems		n 🧐 💷 -
Respond to Questionnaire: UPK Assessment - Consultant		Save Save and Close Subgal Cancel
4 Questionnaire		Time Zone Pacific Standard Time
Title UPX Assessment - Consultant Procurrentent BU ACCO Engineered Systems Ranguested By Jeffrey Wooker	Supplier Stubet Electrical Company Inc Supplier Site Responder Lucy Danielium	Status Draft Dan Date Attachments None
Questions Acco. w.e		Progress Section (1.ACCO - W-9
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		6000 (1.000-00)
		B # 00 • A = 14 ¹⁰⁷⁰

Step	Action
5.	On the " Respond to Questionnaire " screen, you will see the intial questions available for your response.
	Under the first question regarding your W9, Click the Add (+) icon.
6.	Click the Add button.
	+



Step	Action
7.	Click in the *File Name or URL field.
	(To search and locate the W9 form/document saved on your local computer) Browse



Step	Action
8.	Navigate to the desired file on your local computer.
	Click the desired File.
	Sample W9
9.	Click the Open button.
	Open

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acco engineered systems			n 🦻	(L) ~
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Questions Accow.e			Progress Section + 1.AC00-W/B	*
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Step	Action
10.	Click in the Description field.
11.	Type in the desired Description of the document to be uploaded. Enter the desired information into the Description field. Enter " W9 ".
12.	Click the OK button.
13.	The second question asks if you are "an Individual, Sole Propietor, Partnership or a Single Member LLC"? Make your desired selection. Click the a. Yes option.
14.	A secondary question automatically expands, "Enter your 1099 Name" Click in the Response field.
15.	Enter your 1099 name. Please make sure this name matches the name on your W9. (In this example, we used the generic name "Sample 1099 Name")
16.	To view the next section of questions to respond to, Click the Section Name list. 1. ACCO - W-9
17.	Click the 2. ACCO - Certificate of Insurance - Exhibit P list item. 2. ACCO - Certificate of Insurance - Exhibit P



Step	Action
18.	On the ACCO - Certificate of Insurance section, under question #3 regarding the attachment of your Certificate of Insurace,
	Click the Add (+) icon.
19.	Click the Add button.
	+
20.	Click in the *File Name or URL field.
	(To search and locate the form/document saved on your local computer)
	Browse



Step	Action
21.	Navigate to the desired file on your local computer. Click the desired File.
22.	Click the Open button. Open

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4 Questionnaire												ant Saved D/6/19 1:58 PM
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Procurement BU	ACCO Engineered Systems			Supplier	Site				Due De	le .		
Requested By	Jeffrey Weakor			Respo	nder Lucy Daniellan				Attachmen	ts None		
Questions							Progr			Section 4	2. ACCO - Certificate of Ins	arance - Exhibit P 💌 👂
ACCO - Certificate of Insurance - Exhibit P												
3. Please attach a Certificate of Insur Attachments Exhibit P - Consultant	ance and set of Endorsements (6 Insuran	Response Attachn	ients						×			
* Response Attachments N002-		Actions v View v	+ ×									
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Step	Action
23.	Click in the Description field.
24.	Type in the desired Description of the document to be uploaded.Enter the desired information into the Description field. Enter "Cert of Insurance".
25.	Click the OK button.
26.	Click the Section drop-down link to ensure there aren't any additional sections requiring response. Click the Section Name list. 2. ACCO - Certificate of Insurance - Exhibit P
27.	Click the Submit button.
28.	Click the OK button.
29.	You have now completed the exercise. End of Procedure.