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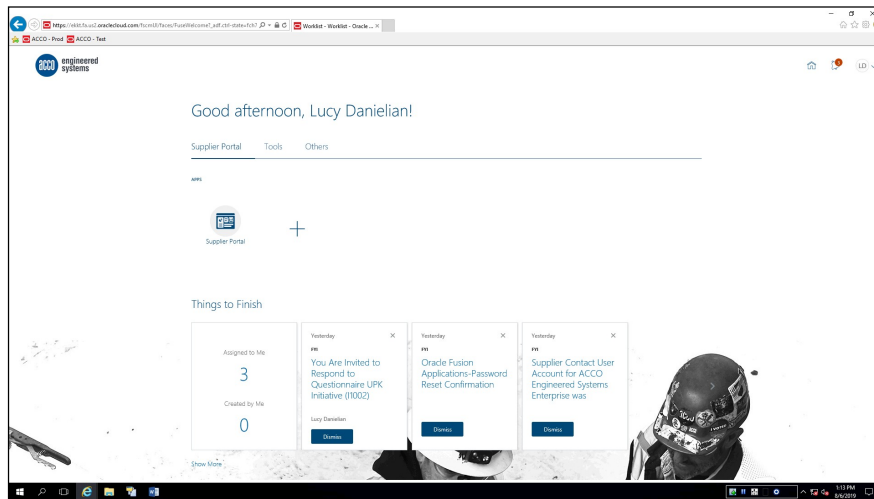
Supplier Management & SQM

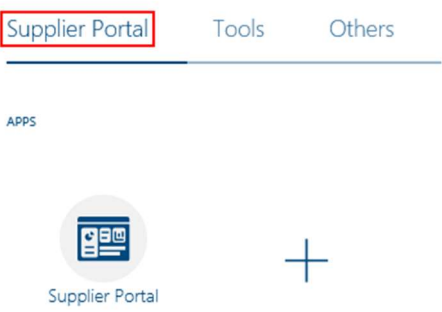
For Current Suppliers _ 9.16.19

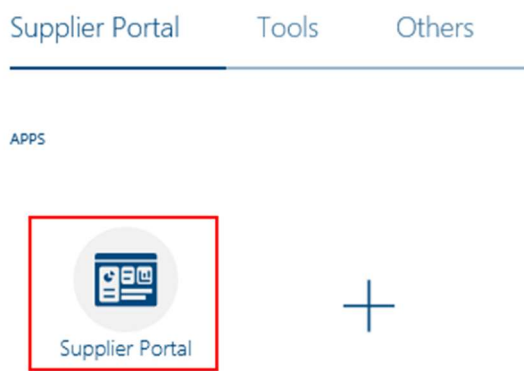
Respond to an Assessment as a Subcontractor

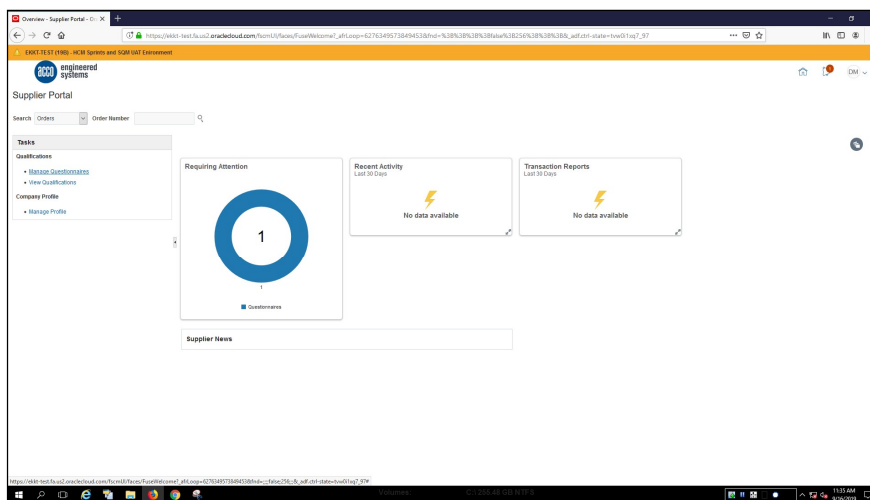
Procedure

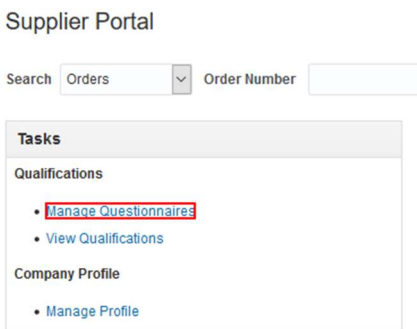
This video will walk you through the process of responding to an assessment as a **Subcontractor** in ACCO Oracle Cloud.

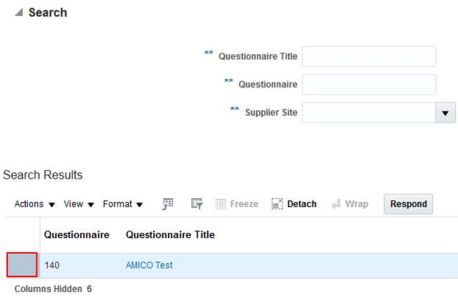



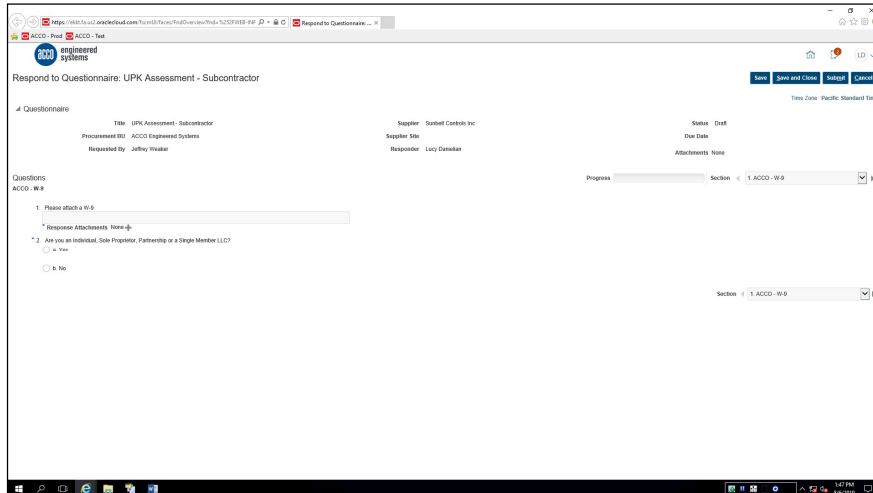
| Step | Action |
|------|--|
| 1. | <p>On the Home Page, click the Supplier Portal menu tab.</p>  |

| Step | Action |
|------|--|
| 2. | <p>Under the Supplier Portal tab, click the Supplier Portal menu icon.</p>  |



| Step | Action |
|------|---|
| 3. | <p>On the Supplier Portal screen, Click the Manage Questionnaires link.</p>  |

| Step | Action |
|------|--|
| 4. | <p>On the Manage Questionnaires screen, select the row you wish to respond to.</p> <p>Click the Row.</p>  |
| 5. | <p>With the row selected, click the Respond button.</p>  |



Respond to Questionnaire: UPK Assessment - Subcontractor

Questionnaire Title: UPK Assessment - Subcontractor
Procurement ID: ACCO Engineered Systems
Requested By: Jeffrey Wislaker

Supplier: Sunbelt Controls Inc.
Supplier Site:
Responder: Lucy Davidson

Status: Draft
Due Date:
Attachments: None

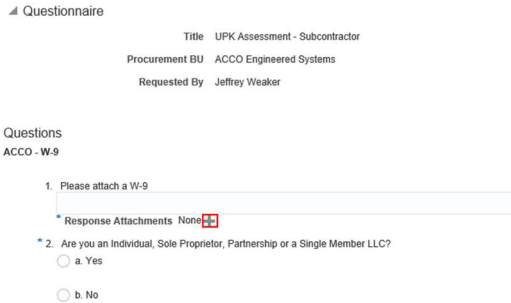
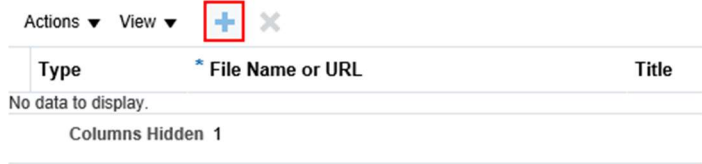
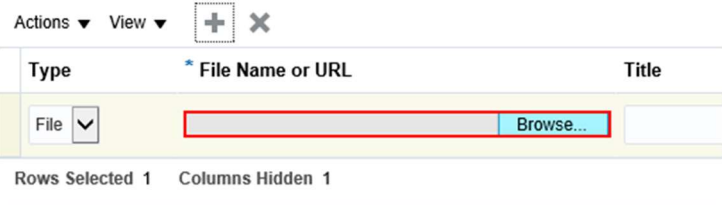
Questions: ACCO - W-9

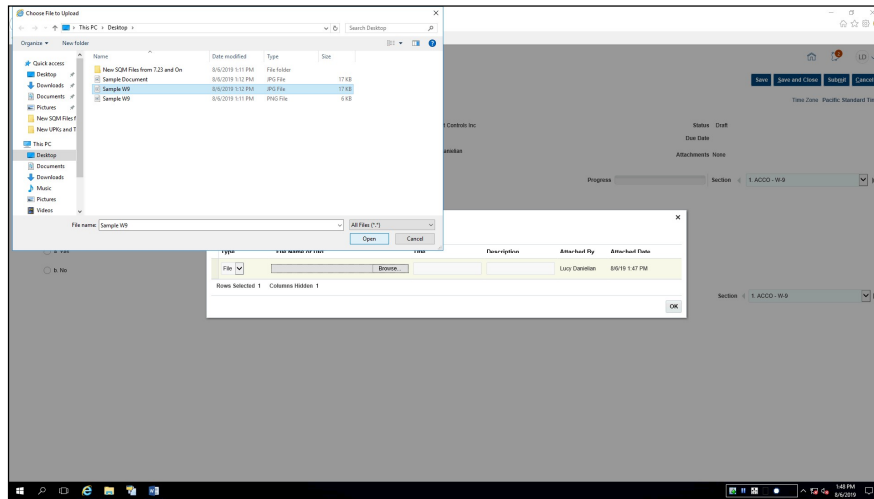
1. Please attach a W-9
Response Attachments: None

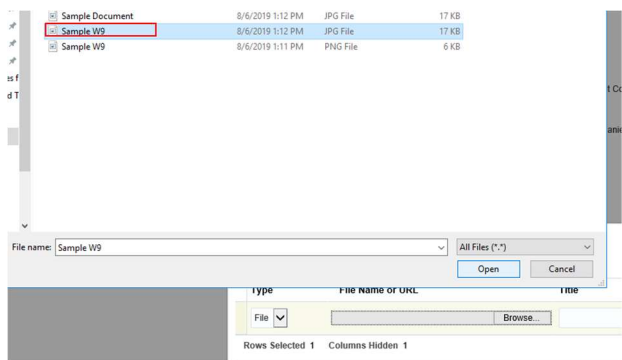
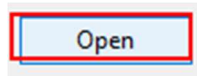
2. Are you an individual, Sole Proprietor, Partnership or a Single Member LLC?
Yes
No

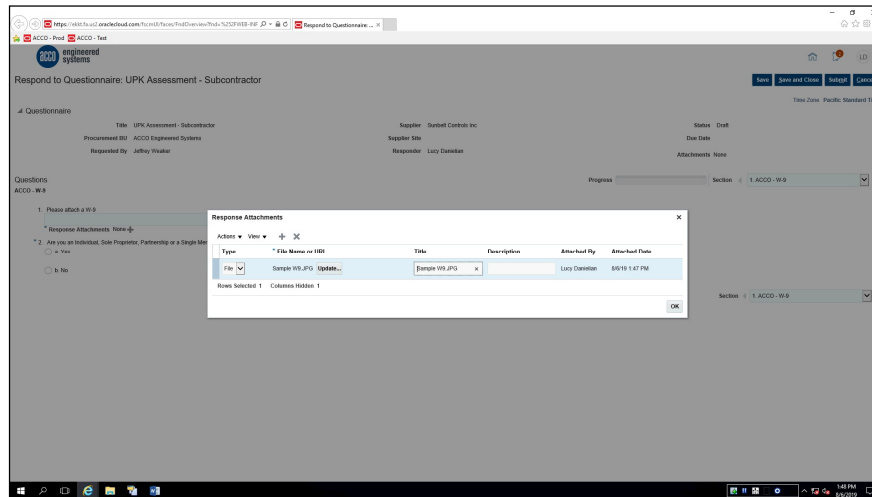
Progress: Section: 1. ACCO - W-9


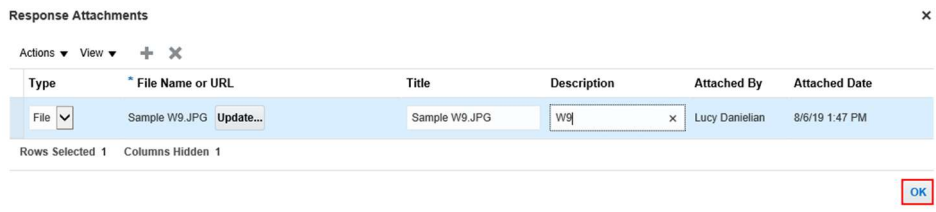
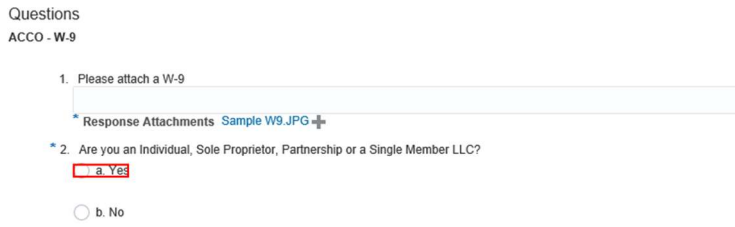
Section: 1. ACCO - W-9

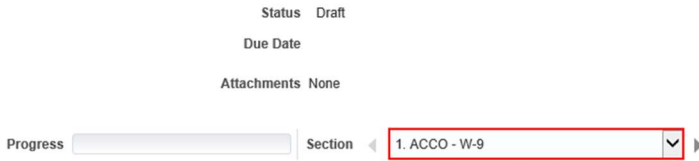
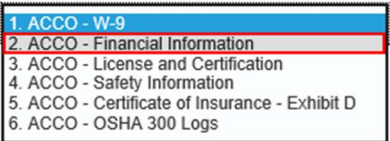
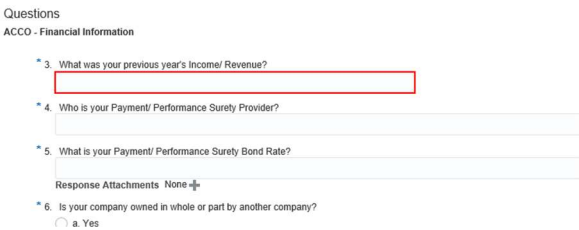
| Step | Action |
|------|---|
| 6. | <p>On the "Respond to Questionnaire" screen, you will see the initial questions available for your response.</p> <p>Under the first question regarding your W9, Click the Add (+) icon.</p> <p>Respond to Questionnaire: UPK Assessment - Subcontractor</p>  |
| 7. | <p>Click the Add button.</p> <p>Response Attachments</p>  |
| 8. | <p>Click in the *File Name or URL field.</p> <p>(To search and locate the W9 form/document saved on your local computer)</p>  |



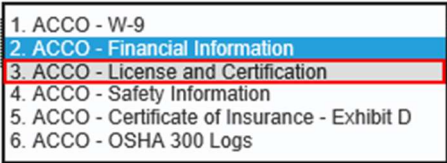









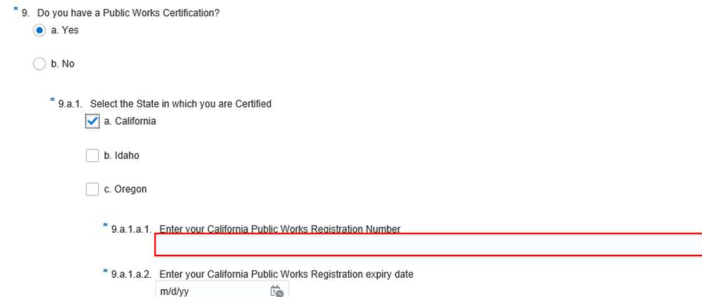
| Step | Action |
|------|--|
| 9. | <p>Navigate to the desired file on your local computer.</p> <p>Click the desired File.</p>  <p>The screenshot shows a file explorer window with a list of files. The file 'Sample W9' is selected. Below the list is a 'File name' field containing 'Sample W9' and a file type dropdown set to 'All Files (*.*)'. The 'Open' button is highlighted.</p> |
| 10. | <p>Click the Open button.</p>  <p>The screenshot shows the 'Open' button highlighted with a red rectangle.</p> |


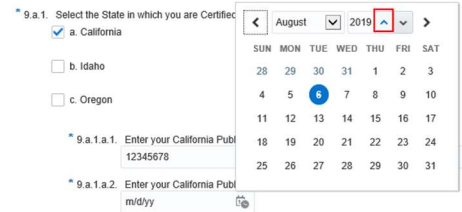


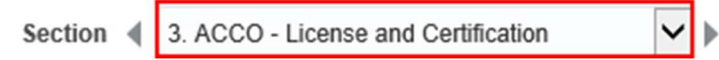
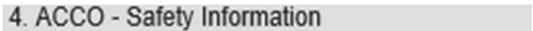




| Step | Action |
|------|---|
| 11. | Click in the Description field.  |
| 12. | Type in the desired Description of the document to be uploaded. Enter the desired information into the Description field. Enter " W9 ". |
| 13. | Click the OK button.  |
| 14. | The second question asks if you are " an Individual, Sole Proprietor, Partnership or a Single Member LLC "? Make your desired selection. Click the a. Yes option.  |
| 15. | A secondary question automatically expands, "Enter your 1099 Name" Click in the Response field. |

| Step | Action |
|------|---|
| 16. | <p>Enter your 1099 name. Please make sure this name matches the name on your W9.</p> <p>(In this example, we used the generic name "Sample 1099 Name")</p> |
| 17. | <p>To view the next section of questions to respond to, Click the Section Name list.</p>  |
| 18. | <p>Click the 2. ACCO - Financial Information list item.</p>  |
| 19. | <p>For question #3, fill in your "previous year's income/revenue"</p> <p>Click in the Response field.</p>  |
| 20. | Enter the desired information into the Response field. Enter " 1000000 ". |
| 21. | <p>For question #4, fill in your "Payment/performance Surety Provider".</p> <p>Click in the Response field.</p> |
| 22. | Enter the desired information into the Response field. Enter " Sample Provider ". |
| 23. | <p>For question #5, fill in your "Payment/Performance Surety Bond Rate."</p> <p>Click in the Response field.</p> |
| 24. | Enter the desired information into the Response field. Enter " Bond Rate Test ". |

| Step | Action |
|------|--|
| 25. | <p>For question #6, select whether your "company is owned in whole or part by another company."</p> <p>For this example, we will click No.</p> <p>Click the b. No option.</p>  |
| 26. | <p>For question #7, fill in "the total number of employees in your organization."</p> <p>Click in the Response field.</p> |
| 27. | <p>Enter the desired information into the Response field. Enter "50".</p> |
| 28. | <p>To view the next section of questions to respond to, Click the Section Name list.</p>  |
| 29. | <p>Click the 3. ACCO - License and Certification list item.</p>  |
| 30. | <p>For question #8, select if you have a "Contractor's License Number"</p> <p>Click the a. Yes option.</p> <p>Questions ACCO - License and Certification</p> <p>* 8. Do you have a Contractor's License Number?</p> <p><input checked="" type="radio"/> a. Yes</p> <p><input type="radio"/> b. No</p> <p>* 9. Do you have a Public Works Certification?</p> <p><input type="radio"/> a. Yes</p> <p><input type="radio"/> b. No</p> <p>* 10. Is your company affiliated with any of the following unions? Please check all that apply</p> <p><input type="checkbox"/> a. BOILER MAKERS (Int'l Brotherhood of Boilermakers, Iron Ship Builders, Blacksmiths, Folders & Helpers)</p> <p><input type="checkbox"/> b. CARPENTERS (Southwest Regional Council of Carpenters)</p> <p><input type="checkbox"/> c. HEAT & FROST (Int'l Assoc. of Heat & Frost Insulators & Asbestos Workers)</p> <p><input type="checkbox"/> d. HPIAW (Int'l Assoc. of Heat & Frost Insulators and Allied Workers)</p> |
| 31. | <p>Select the "state in which you are licensed"</p> <p>Click the b. California option.</p>  |

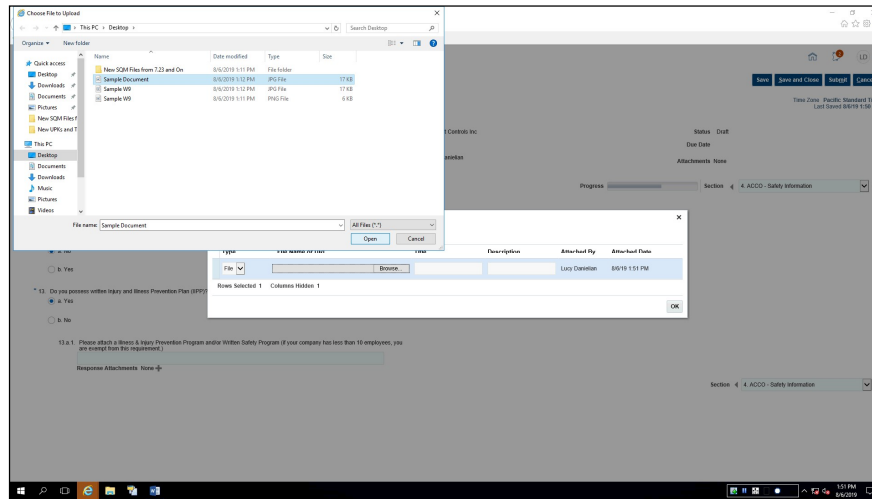
| Step | Action |
|------|--|
| 32. | <p>Under "What is your California Contractor's License Number", enter your contractors number.</p> <p>Enter the desired information into the Response field. Enter "1234567".</p> |
| 33. | <p>Then select the expiration date of your contractor's license.</p> <p>Click the Select Date button.</p>  |
| 34. | <p>Click the increment button.</p>  |
| 35. | <p>In the example we selected a date 1 year from today.</p> <p>Click the 6 cell.</p>  |
| 36. | <p>For question #9, select if you have a "Public Works Certification"</p> <p>Click the a. Yes option.</p>  |
| 37. | <p>Scroll the a. California object with the mouse wheel.</p>  |
| 38. | <p>Select the state in which you are certified,</p> <p>Click the a. California option.</p>  |
| 39. | <p>Enter your "Public Works Registration Number"</p> <p>Click in the Response field.</p>  |

| Step | Action |
|------|---|
| 40. | Enter the desired information into the Response field. Enter " 12345678 ". |
| 41. | Click the Select Date button.  |
| 42. | Click the increment button.  |
| 43. | Click the 6 cell.  |
| 44. | For question #10, select if your company is affiliated with any unions: Click the b. CARPENTERS (Southwest Regional Council of Carpenters) option.  |
| 45. | Enter the union number of your selection: Click in the Response field. |
| 46. | Enter the desired information into the Response field. Enter " 12345678 ". |
| 47. | To view the next section of questions to respond to, Click the Section Name list.  |
| 48. | Click the 4. ACCO - Safety Information list item.  |

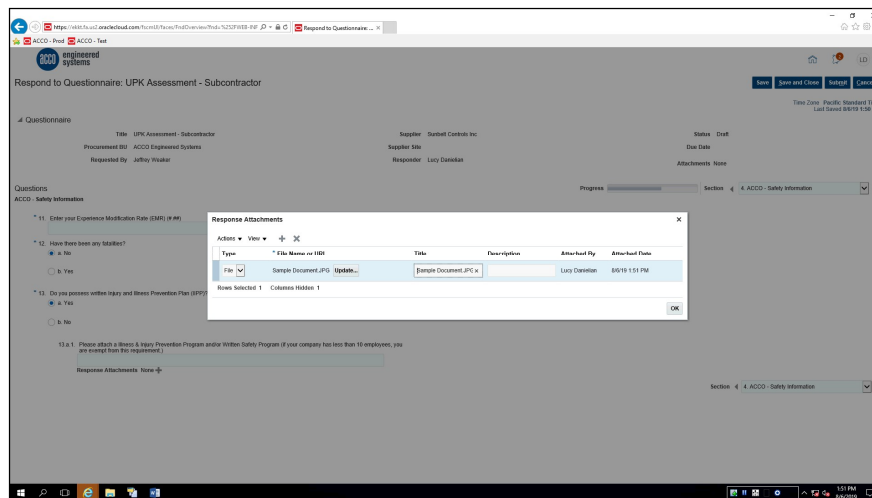
| Step | Action |
|------|---|
| 49. | <p>For question #11, fill in your EMR</p> <p>Click in the Response field.</p> <p>Questions ACCO - Safety Information</p> <p>* 11. Enter your Experience Modification Rate (EMR) (# ##)</p> <p><input type="text"/></p> <p>* 12. Have there been any fatalities?</p> <p><input type="radio"/> a. No</p> <p><input type="radio"/> b. Yes</p> <p>* 13. Do you possess written Injury and Illness Prevention Plan (IIPP)?</p> <p><input type="radio"/> a. Yes</p> <p><input type="radio"/> b. No</p> |
| 50. | Enter the desired information into the Response field. Enter " 1 ". |
| 51. | <p>For question #12, select if your company has had any fatalities</p> <p>Click the a. No option.</p> <p><input checked="" type="radio"/> a. No</p> |
| 52. | <p>For question #13, select if you possess an IIPP</p> <p>Click the a. Yes option.</p> <p><input checked="" type="radio"/> a. Yes</p> |
| 53. | <p>If yes, you will need to add an attachment.</p> <p>Click the Manage Attachments button.</p> <p></p> |
| 54. | <p>Click the Add button.</p> <p></p> |
| 55. | <p>Click in the *File Name or URL field.</p> <p><input type="text"/> <input type="button" value="Browse..."/></p> |

Training Guide

Supplier Management & SQM

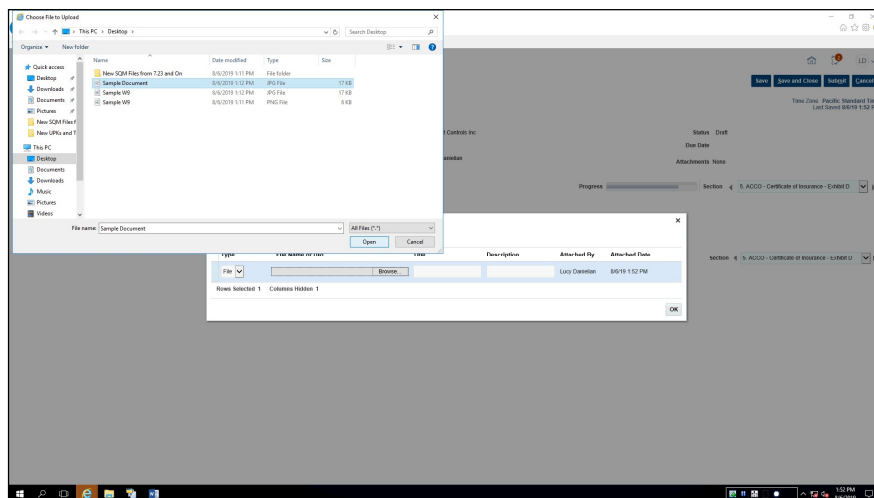


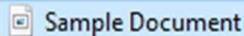
| Step | Action |
|------|--|
| 56. | Select the document from your local computer and click Open . |

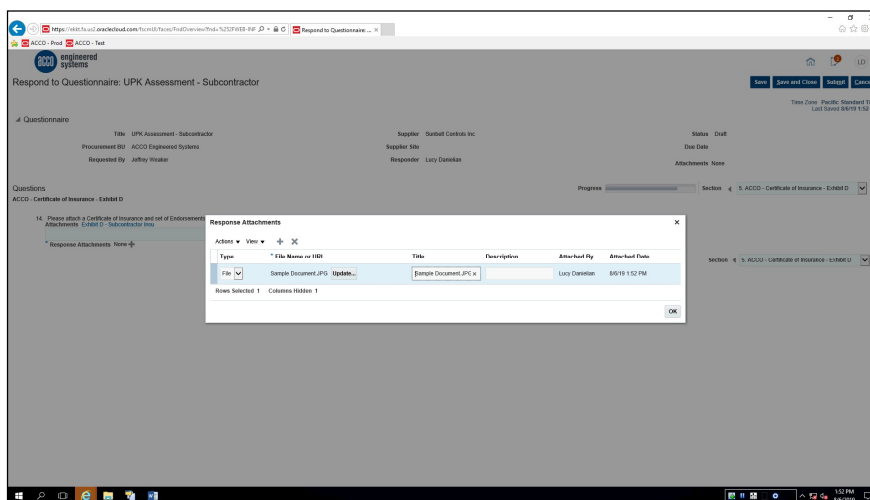




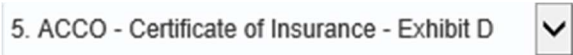
| Step | Action |
|------|---|
| 57. | Click in the Description field. |
| 58. | Enter the desired information into the Description field. Enter " Safety Program ". |
| 59. | Click the OK button. |



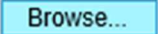
| Step | Action |
|------|---|
| 60. | To view the next section of questions to respond to, Click the Section Name list. <div> 4. ACCO - Safety Information </div> |
| 61. | Click the 5. ACCO - Certificate of Insurance - Exhibit D list item. <div> Section <div> 1. ACCO - W-9 2. ACCO - Financial Information (Completed) 3. ACCO - License and Certification (Completed) 4. ACCO - Safety Information 5. ACCO - Certificate of Insurance - Exhibit D 6. ACCO - OSHA 300 Logs </div> </div> |
| 62. | On the ACCO - Certificate of Insurance section, under question #14 regarding the attachment of your Certificate of Insurance, Click the Add (+) icon. <div>+</div> |
| 63. | Click the Add button. <div>+</div> |
| 64. | Click in the *File Name or URL field. (To search and locate the form/document saved on your local computer) <div> Browse... </div> |

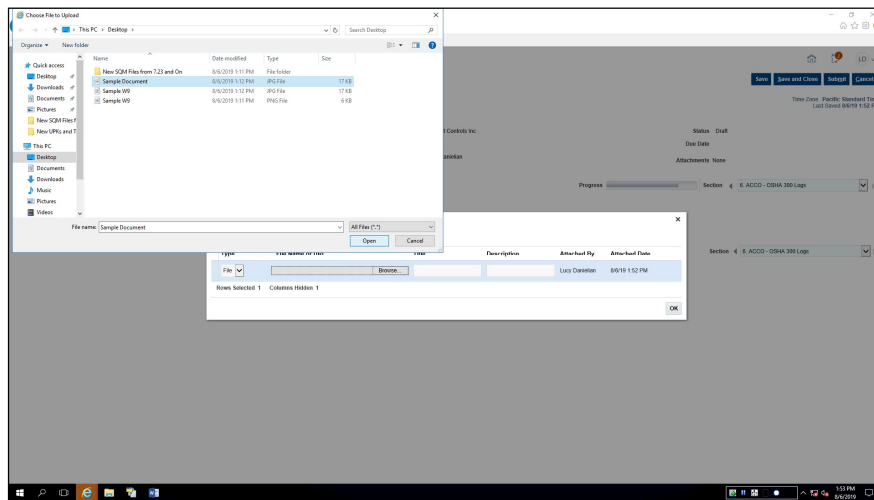


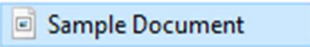
| Step | Action |
|------|---|
| 65. | <p>Navigate to the desired file on your local computer.</p> <p>Select the desired file and click Open.</p>  |

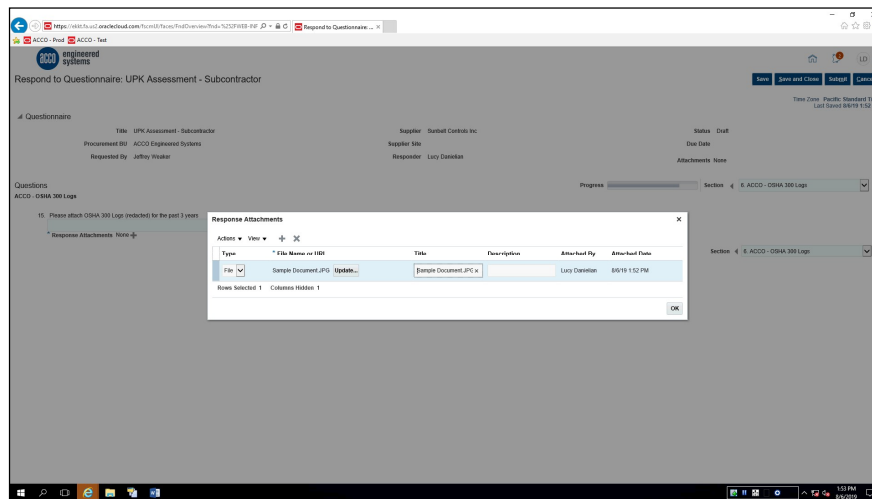






| Step | Action |
|------|--|
| 66. | <p>Click in the Description field.</p>  |
| 67. | <p>Type in the desired Description of the document to be uploaded.</p> <p>Enter the desired information into the Description field. Enter "Cert of Insurance".</p> |
| 68. | <p>Click the OK button.</p>  |
| 69. | <p>To view the next section of questions to respond to,</p> <p>Click the Section Name list.</p>  |

| Step | Action |
|------|--|
| 70. | Click the 6. ACCO - OSHA 300 Logs list item. <div> <div>Section</div> <div> 1. ACCO - W-9 2. ACCO - Financial Information (Completed) 3. ACCO - License and Certification (Completed) 4. ACCO - Safety Information (Completed) 5. ACCO - Certificate of Insurance - Exhibit D 6. ACCO - OSHA 300 Logs </div> </div> |
| 71. | To attach an OSHA 300 Log, click the Add (+) icon.  |
| 72. | Click the Add button.  |
| 73. | Click in the *File Name or URL field.  |



| Step | Action |
|------|---|
| 74. | Navigate to the desired file on your local computer. Select the desired file and click Open .  |



| Step | Action |
|------|---|
| 75. | Click in the Description field.  |
| 76. | Enter the desired information into the Description field. Enter " OSHA 300 ". |
| 77. | Click the OK button.  |
| 78. | Click the Submit button.  |
| 79. | Click the OK button.  |
| 80. | You have now completed the exercise. End of Procedure. |