Source-to-Pay (S2P) Coupa Supplier Portal Informational Session

June 4, 2024

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Cynthia Haug

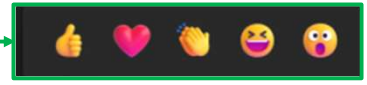
Executive Director – Buy-to-Pay Pay Operations

1 Introduction

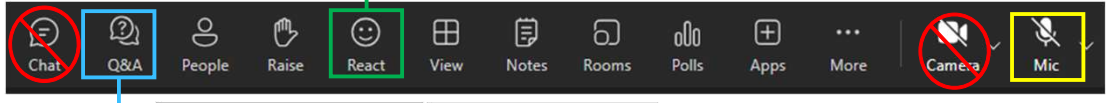
Scott Whitacre
Sr Dir - Indirect Spend, Category Mgmt, HW and SW

Using Teams

Due to the large number of participants, Chat & Video has been disabled for this meeting.



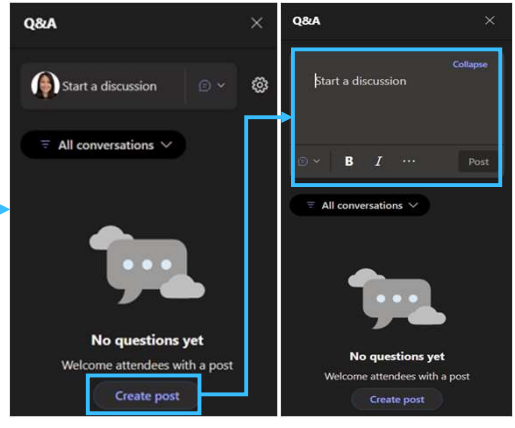
Participants can share reactions by selecting the emoji after clicking the React button



All participants will be muted at the beginning of the call; if needed, click on the Mic button to unmute

The Q&A function will be used for questions.

- Please post your question(s) by clicking on Q&A and Create post.
- Type your question into the dialogue box when it appears.



Overview of Today's Session

TODAY'S OBJECTIVES

Understand the Source-to-Pay (S2P) Transformation Program
Learn about KP's investment in transforming the way we source, buy, receive, and pay for goods and services.

Key information for the upcoming June 12th go-live
Learn about new requirements for doing business with Kaiser Permanente.

Preview Supplier resources
Discuss how Suppliers are being engaged and supported in preparation for go-live and discuss key actions for Suppliers to take in advance.

Discuss your questions
Dedicate time to answer your initial questions about the upcoming CSP launch.

2 Source-to-Pay (S2P) Transformation Overview

Scott Whitacre

Source-to-Pay Transformation Program- Supplier Impacts

The S2P Program is a **strategic initiative** aimed at transforming and **enhancing Kaiser Permanente's (KP) supply chain operations**. The program seeks to implement KP SMARTsupply, **incorporating best-in-class technologies**, streamlined processes, and **an enhanced supplier experience.**

01 Simplified sourcing and contracting process for suppliers to bid on goods and services and contract.

02 Launch of new supplier portal to improve supplier experience.

03 Faster payments to suppliers with better data accuracy and streamlined procure to pay cycles.

04 Improved accuracy of KP's master data including supplier and product information

05 Enhanced electronic invoicing and messaging for digital business-to-business (B2B) communications.

06 Utilization of artificial intelligence (AI) technology to expand digital invoices processing.

Vendors can stay connected and access resources: https://tinyurl.com/kpS2Pvendor

3 Key Information for the June 12th Go Live

Sandra Diaz

Dir – Accounts Payable

The Source-to-Pay Technology Platform (SMARTsupply)

Our new enterprise supply chain technology platform, KP **SMARTsupply,** incorporates best-in-class technologies that include new tools like Coupa Supplier Portal (CSP).

coupa

What is it?

The Coupa Supplier Portal (CSP) is a free tool for suppliers to easily do business with their customers who use Coupa

What can Suppliers do?

View purchase orders, set up delivery methods, create catalogs, and send invoices, check the status of transactions, and more

Register for CSP Today!

Suppliers attending this session will be going live on the CSP on June 12th, 2024. You must accept the CSP invitation and complete the required registration steps on the CSP in preparation for the June 12th launch.

Monitor Your Inbox

Look for an email invitation coming directly from Coupa as **do_not_reply@supplier.coupahost.com**

Monitor your junk box in case the message goes to spam.

Accept the CSP Invite

When you receive the email, please accept the CSP invitation and complete the required registration steps on the CSP by May 24th in preparation for the June 12th Go Live.

Use CSP

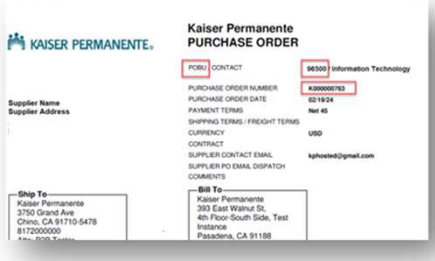
You will use CSP to submit invoices for payment, resolve invoice discrepancies (also known as disputed invoices) that Kaiser Permanente has identified, and to view your transaction history for Coupa related POs and invoices.

Key purchase order details for the Coupa Supplier Portal launch

With the Coupa Supplier Portal (CSP) launch, Kaiser Permanente will utilize two formats for Purchase Order (PO) numbers. See below for details to help you prepare.

Coupa POs

- POs generated from Coupa are prefixed with a 'K' followed by a 9-digit number (e.g. K000000000).
- **There is a five-digit Purchasing Order Business Unit number (POBU#) appearing on PO documents that must be placed in front of the PO #. (e.g., 02501K000000000) on the shipping documents**


KAISER PERMANENTE®

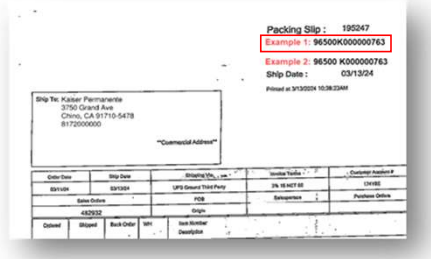
Kaiser Permanente
PURCHASE ORDER

POBU CONTACT 96500 Information Technology
PURCHASE ORDER NUMBER K000000763
PURCHASE ORDER DATE 02/19/24
PAYMENT TERMS Net 45
SHIPPING TERMS / FREIGHT TERMS
CURRENCY USD
CONTRACT
SUPPLIER CONTACT EMAIL kphosted@gmail.com
SUPPLIER PO EMAIL DISPATCH
COMMENTS

Supplier Name
Supplier Address

Ship To
Kaiser Permanente
3750 Grand Ave
Chino, CA 91710-5478
8172000000

Bill To
Kaiser Permanente
393 East Walnut St,
4th Floor-South Side, Test Instance
Pasadena, CA 91188


Packing Slip : 195247
Example 1: 96500K000000763
Example 2: 96500 K000000763
Ship Date : 03/13/24

Ship To: Kaiser Permanente
3750 Grand Ave
Chino, CA 91710-5478
8172000000

"Commercial Address"

- The POBU number is required to be included on your **shipping documents in front of the PO#. If the POBU followed by the PO# are missing from the shipping documents, it will result in NON-PAYMENT due to inadequate proof of delivery.**

OneLink POs

- You will continue to receive existing OneLink 15-digit PO # scheme (e.g., 11111-1111111111). Please process them as usual.
- If you receive a PO from OneLink, continue submitting OneLink invoices through your current invoicing channel.
- You will not be able to view any non-Coupa documents via the CSP

Please Note:
Suppliers that will be receiving POs via GHX and submitting invoices via GHX will not experience any system or process related changes because of POBU location on shipping documents.

Invoicing Requirements for the Coupa Supplier Portal launch

The Kaiser Permanente Coupa Supplier Portal (CSP) launch will introduce an additional format for Purchase Order (PO) numbers and different invoice submission requirements. See below for details to help you prepare.

Invoicing

- ❑ To ensure proper invoice matching and payments related to shipping or miscellaneous fees/charges, these fees/charges must be billed at the header level.
- ❑ Any line level shipping or miscellaneous fees/charges will be disputed and returned to Supplier for correction.
- ❑ Please review and evaluate any system changes you may need to make to enable proper billing for these shipping or miscellaneous fees/charges at the header level.
- ❑ Invoices for all non-Coupa POs should be submitted through current invoicing channels
- ❑ Invoices for Coupa POs must be submitted electronically through CSP to prevent payment delays.
- ❑ When you log into CSP, you will see the Coupa PO# starting with 'K' followed by the 9-digits (K000000000).
- ❑ To facilitate prompt processing of invoice payments for invoices through the CSP, shipping costs and miscellaneous charges must be **incorporated at the invoice header level and not the line level on invoices**.
- ❑ cXML/EDI transmission is available through GHX.

Please Note:
You are required to comply with invoice and accounts payable requirements when submitting an invoice for payment. **Failure to follow requirements will result in invoices not being processed, paid, and returned to you.** Please review Kaiser Permanente's invoice and payment requirements for suppliers

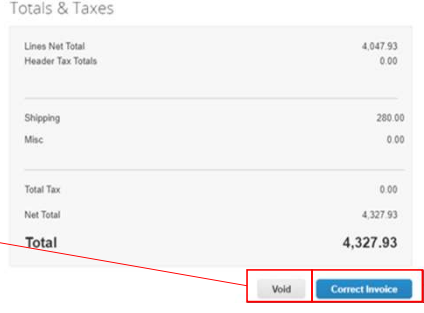
Disputed Invoices for Coupa POs

Disputed invoices will appear in CSP. Suppliers are required to use CSP to resolve disputed invoices for Coupa POs to ensure timely payment.

HOW TO RESOLVE DISPUTED INVOICES

- Suppliers can view their disputed invoices in CSP and resolve them in the following ways:

Void the invoice and submit a new and corrected invoice as needed



Correct the invoice and resubmit it

- After the invoice is corrected in CSP, it is routed back to the approval chain in Coupa. Once an invoice is Approved in Coupa, you can view the status under the Invoices tab in CSP.

WHERE TO GO FOR MORE INFORMATION

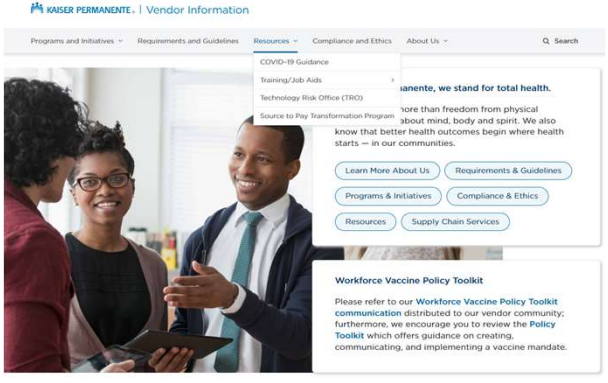
- Refer to this quick reference guide for additional information on how to handle disputed invoices in CSP
- Email any questions related to handling invoice disputes to S2P-Transformation-Info@kp.org.

4 Supplier Resources

Scott Whitacre

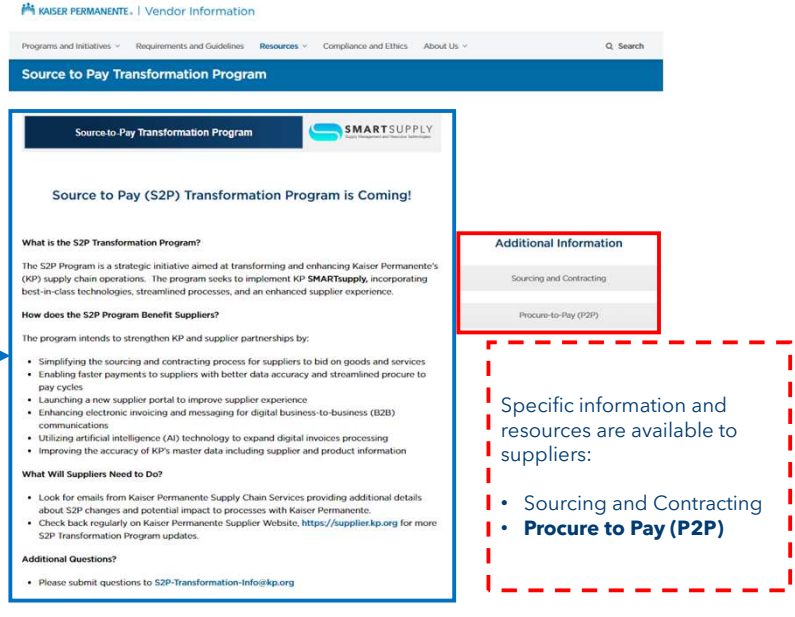
KP Vendor Information Website

The KP Vendor Information website has been updated to provide information to suppliers about the S2P Transformation Program. Content and resources will be updated as more information becomes available.



Vendors can stay connected and access resources:

https://tinyurl.com/kpS2Pvendor



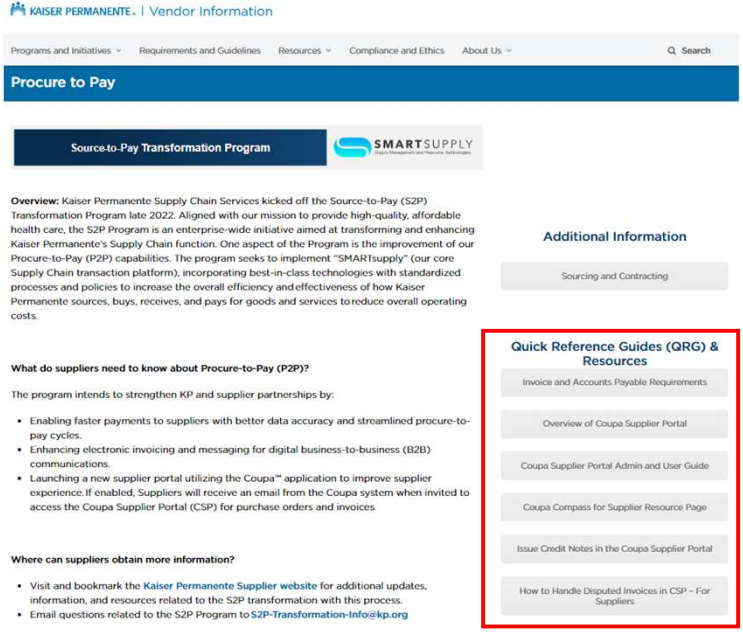
Specific information and resources are available to suppliers:

- Sourcing and Contracting
- **Procure to Pay (P2P)**

Procure-to-Pay Supplier Resources

Procure-to-Pay (P2P) specific information can be found on the P2P subpage linked on the homepage. Quick reference guides and additional information related to the P2P processes within CSP are available from this page.

Procure to Pay (P2P) Resource page for Suppliers



Quick Reference Guides and Resources for suppliers

- Invoice and Accounts Payable Requirements
- Overview of Coupa Supplier Portal
- CSP Admin and User Guide
- Coupa Compass for Suppliers Resource page
- Issue Credit Notes in the Coupa CSP
- How to Handle Disputed Invoices in CSP

Additional resources will be available

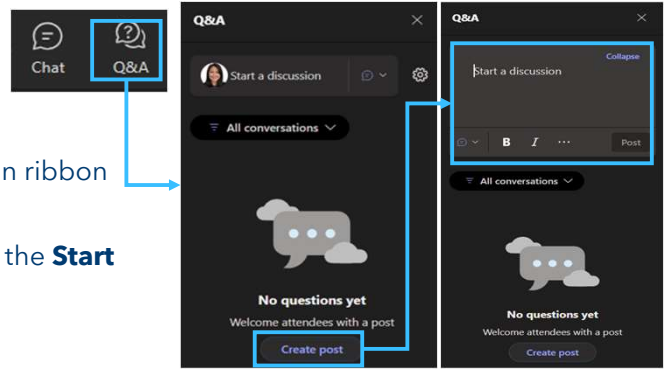
5

Q&A

Sandra Diaz and Scott Whitacre

Discussion

What questions do you have?



Please post your question(s)

- Click on **Q&A** in the Teams navigation ribbon
- Click on **Create post**
- Type your question or comment into the **Start a discussion** dialogue box
- Click **Post**

Complete the post meeting survey

Complete the Post Meeting Survey today!

If you did not receive the Coupa invitation or need help – Let us know in the post meeting survey

https://forms.office.com/r/BBzswSx3wx

Survey will close 6/11/24

6 Wrap Up

Cynthia Haug

Follow Up Actions for Suppliers

1

Accept the invitation & complete the registration process

- When you receive the email, please accept the CSP invitation and complete the required registration steps on the CSP if you have not completed this step in preparation for the June 12th Go Live.
- Check your spam folder for emails from **do_not_reply@supplier.coupahost.com**

2

If you did not receive the Coupa invitation or need help – Let us know in the post meeting survey

3

Complete the Post Meeting Survey today!

Survey will close 6/11/24

Thank you for your partnership!

Coupa CSP Message Sample

Action Required - Kaiser Permanente Registration Instructions

KAISER PERMANENTE®

Kaiser Permanente (KP) has added you as a supplier on the Coupa Supplier Portal (CSP).

To avoid payment delays, for **all Purchase Orders (POs) received from Coupa** suppliers must submit invoices electronically through the proper platform. Suppliers utilizing GHX to receive POs should use GHX, while suppliers receiving POs via email from Coupa (do_not_reply@kp.coupahost.com) should use the Coupa Supplier Portal (CSP). You have already received a separate communication containing additional details.

If you receive a Purchase Order from OneLink, continue submitting OneLink invoices through your current invoicing channel. You **will not** be able to view any non-Coupa documents via the Coupa Supplier Portal (CSP).

Where to go for more information

- Visit and bookmark the Kaiser Permanente Supplier website and the P2P Supplier page for additional updates, information, and resources related to the S2P Transformation.
- Please do not reply to this email, as it is not monitored. For questions, email KP at S2P-Transformation-Info@kp.org.
- Once logged in to the Coupa Supplier Portal, navigate to the 'Help' button located at the top right of any CSP page to view supplier focused FAQs on a variety of subjects.

For next steps on joining and logging in if you do not already have a CSP account, see the buttons below.

Thank you,
Kaiser Permanente S2P Transformation Program Team

Join Coupa Supplier Portal | **Forward Invitation**

FAQ's for Suppliers

KP Supply Chain Services
Source-to-Pay Transformation Program

Question: We've been getting emails from S2P-Transformation-Info@kp.org asking us to respond to the Coupa Supplier Portal invitation by a certain date, but we haven't received the invitation. How can we get it?

- The Coupa Supplier Portal invite is sent only to the key account and registration contact in KPVM. If you are the key account and registration contact in KPVM, please check your spam folder. If you are still unable to locate the email, please reach out to (email).
- Once the Coupa Primary Contact has accepted and completed registration, s/he can invite others to join your company's Coupa account.

Question: I've received an invite to the Coupa Supplier Portal (CSP), but I'm not the right person. How can I get it to the correct individual at my company?

- The Coupa Supplier Portal invite is sent only to the key account and registration contact flagged in the KPVM portal. If the contact has changed, the supplier must update their KPVM profile details as this is the source data that Kaiser Supply Chain systems use for supplier information.
- The invitee may forward the CSP invite to an individual with the same email domain. For security reasons, Coupa doesn't allow the primary contact who received the invite to forward it to someone with a different domain.
- Regardless of whether the domain is the same or not, Suppliers should update their profile details in the KPVM portal every six months to ensure contact information is correct in KP systems

Question: I got a Coupa Supplier Portal invite from do_not_reply@supplier.coupahost.com. Is this from Kaiser Permanente or a scam?

- Suppliers may have missed initial awareness emails regarding the Coupa Supplier Portal thus leading them to question the legitimacy of the invitation link. The email from the email domain @supplier.coupahost.com is from the new Coupa system Kaiser Permanente will implement.

Question: I signed up on the Coupa Supplier Portal and forgot my password. When I use the 'Forgot Password' feature in Coupa, I don't receive an email to reset my password. What should I do?

- First, check your spam or junk mail folder for the password reset email.
  If the problem persists, reach out to Coupa support at Supplier@coupa.com.
  It's important to note that KP does not have access to reset or change the supplier's password. If the Coupa Password Reset functionality is not working, only Coupa support can help resolve this issue.

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