



Supplier Portal (CSP) guide

September 2023



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Registering as a supplier with Alberta Blue Cross



Introduction

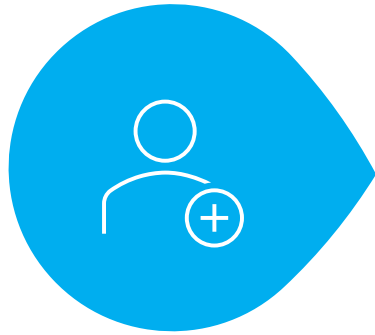
Alberta Blue Cross utilizes Coupa to create and manage contracts, assess risk and manage supplier information management.

When you register as a supplier at Alberta Blue Cross, you can expect an easy process for

- Negotiating future contracts with Alberta Blue Cross,
- Assessing risk and controlling information, and
- Keeping your banking details up to date to ensure fast payment, through the CSP.



Supplier onboarding process



New request

Your Alberta Blue Cross contact will submit an internal request to register you as a new supplier.



Approvals

Once approved internally, you will be set up in the Alberta Blue Cross procurement system, Coupa.



Communication

You will receive an automatic notification via email, inviting you to complete the supplier onboarding form.



Onboarded

Once you have submitted the supplier onboarding form and it has been approved, you are ready to do business with Alberta Blue Cross.





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Getting started with the CSP



Getting started with the CSP

What is the CSP?

The Coupa Supplier Portal (CSP) is a free web-based platform for suppliers to easily do business with Alberta Blue Cross. It makes managing transactions easy and consolidates all relevant information in 1 simple-to-use location.

By joining the CSP you can

- Manage your company information and remittance information ensuring it is always up to date.
- View and manage POs received from Alberta Blue Cross.
- Invoice Alberta Blue Cross and view the status in real time.



Creating a CSP account

If your client has the correct email address, they will send you an invitation to your email to register on the CSP. From the email you receive, you will have 2 options.

1. Join and Respond, proceed to [slide 9](#).
2. Respond Without Joining, proceed to [slide 68](#).



Alberta Blue Cross strongly recommends joining the CSP in order to create a reusable profile and better track your interactions.

ALBERTA BLUE CROSS

Alberta Blue Cross Profile Information Request - Action Required

Dear valued supplier,

Alberta Blue Cross® would like to onboard your company through Coupa, our online procurement system.

The Coupa Supplier Portal makes it easy to provide and update your company information, manage POs, submit invoices, and track approval statuses. Coupa offers a wide range of benefits, including those listed below and more:

- **It's free.** You will not be charged for hosting or accessing the Coupa Supplier Portal. You can network with other vendors and electronically manage orders without any fees.
- **Get paid quicker.** By joining the Coupa Supplier Portal, you'll be part of our standard procurement process. This means you'll receive purchase orders sooner, invoice authorizations will happen faster, and you'll get paid quicker.
- **Expediate contracting.** Submit and update all necessary questionnaires to help expedite the contracting process.
- **Save time, money, and the environment.** The Coupa Supplier Portal eliminates paper purchase orders and the printing and mailing of paper invoices. This results in fewer manual steps for your employees, faster turn-around times, and more time for your employees to focus on strategic work. You'll also use less paper, creating a smaller ecological footprint and helping to keep our planet green.
- **Quick to set up and easy to use.** No technology installations or additional software are required to access the Coupa Supplier Portal. All you need is internet access and an email account.
- **Stay updated.** Joining the Coupa Supplier Portal allows you to manage your information with Alberta Blue Cross, such as your address, banking, and remit to address. You can update any changes to your company and banking details to ensure further swift payment.

To get started with the Coupa Supplier Portal, select the Join and Respond button below. You can also send your information to Alberta Blue Cross without joining the Coupa Supplier Portal by selecting Respond Without Joining. However, if you respond without joining, you cannot update your company information through the Coupa Supplier Portal. Any future updates will be done manually and could potentially add time to contracting and payment.

1 Join and Respond **2** Respond Without Joining



Creating a CSP account

When you click on the **Join and Respond** button, you will be redirected to the activation page of your CSP account.

3. Complete the required fields.
4. Review the Coupa Privacy Policy and Terms of Use documents. Once reviewed, select the **check box**.
5. Click **Create an Account**.



It is recommended that you use Google Chrome or Microsoft Edge when using the CSP.

coupa supplier portal

Create an Account

Alberta Blue Cross is using Coupa to transact electronically and communicate with you. We'll walk you through a quick and easy setup of your account with Alberta Blue Cross so you're ready to do business together.

3 * Business Name
AN test 6_20
Your legal business name (or legal personal name if an individual)

* Email
uat.abc.23+12@gmail.com

* First Name
Anna

* Last Name
Smith

* Password
.....

* Confirm Password
.....
Use at least 8 characters and include a number and a letter.

I accept the [Privacy Policy](#) and the [Terms of Use](#)

4

5 **Create an Account**

Already have an account? [LOG IN](#)
[Forward this to someone](#)



Creating a CSP account

6. Complete the required fields. Some fields may have been pre-populated by Alberta Blue Cross—you can make changes to the fields as required.
7. Click **Next**.
8. In the *Action Needed: Update Customer Information* window, click **Open**. Proceed to [slide 13](#).

ALBERTA BLUE CROSS **Your Contact Information**

* First Name: Anna * Last Name: Smith

* Phone Number: 9193896309

* Country/Region: United States

* Address: 33 IRVING PL FL 10

* City: NEW YORK State: New York * Postal Code: 10003

Next Skip for Now

Action Needed: Update Customer Information

You have 1 new or existing information request. This request must be sent to your customer in order for them to have your updated information:

Alberta Blue Cross	✓ Can be submitted for approval	Open
--------------------	---------------------------------	------

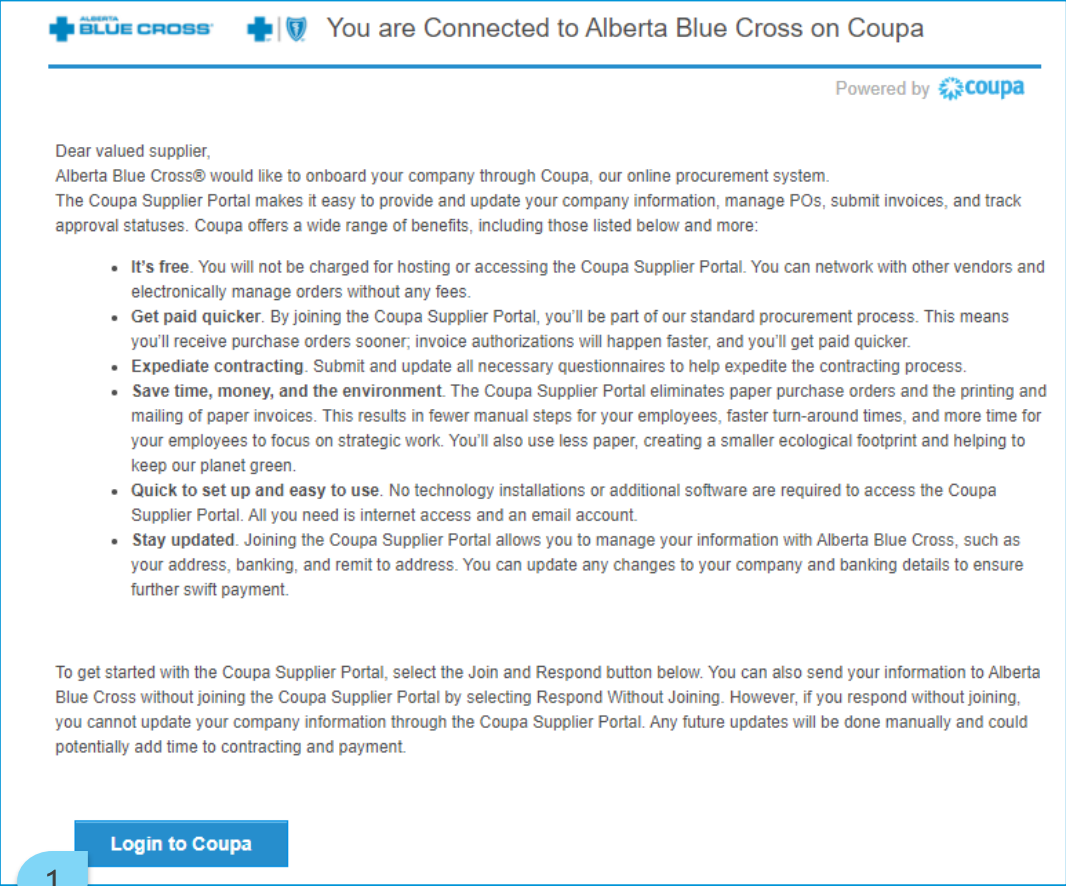
Close



Existing CSP account

If you already have an account on the CSP, the primary contact will receive the following email to register:

1. Click **Login to Coupa**. Proceed to [slide 12](#).



The screenshot shows an email header with the Alberta Blue Cross logo and the text "You are Connected to Alberta Blue Cross on Coupa". Below the header, it says "Powered by Coupa". The main body of the email addresses a "valued supplier" and explains the benefits of joining the Coupa Supplier Portal. A list of benefits includes: it's free, faster payment, expedited contracting, time and environmental savings, ease of use, and staying updated. At the bottom, there is a "Login to Coupa" button and a blue circle with the number "1" next to it.

ALBERTA BLUE CROSS + You are Connected to Alberta Blue Cross on Coupa

Powered by Coupa

Dear valued supplier,
Alberta Blue Cross® would like to onboard your company through Coupa, our online procurement system.
The Coupa Supplier Portal makes it easy to provide and update your company information, manage POs, submit invoices, and track approval statuses. Coupa offers a wide range of benefits, including those listed below and more:

- **It's free.** You will not be charged for hosting or accessing the Coupa Supplier Portal. You can network with other vendors and electronically manage orders without any fees.
- **Get paid quicker.** By joining the Coupa Supplier Portal, you'll be part of our standard procurement process. This means you'll receive purchase orders sooner; invoice authorizations will happen faster, and you'll get paid quicker.
- **Expediate contracting.** Submit and update all necessary questionnaires to help expedite the contracting process.
- **Save time, money, and the environment.** The Coupa Supplier Portal eliminates paper purchase orders and the printing and mailing of paper invoices. This results in fewer manual steps for your employees, faster turn-around times, and more time for your employees to focus on strategic work. You'll also use less paper, creating a smaller ecological footprint and helping to keep our planet green.
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- **Stay updated.** Joining the Coupa Supplier Portal allows you to manage your information with Alberta Blue Cross, such as your address, banking, and remit to address. You can update any changes to your company and banking details to ensure further swift payment.

To get started with the Coupa Supplier Portal, select the Join and Respond button below. You can also send your information to Alberta Blue Cross without joining the Coupa Supplier Portal by selecting Respond Without Joining. However, if you respond without joining, you cannot update your company information through the Coupa Supplier Portal. Any future updates will be done manually and could potentially add time to contracting and payment.

Login to Coupa

1



Getting started with the CSP

Logging in to your CSP account

1. Go to supplier.coupahost.com.
2. Enter your credentials and click **Login**.

coupa supplier portal Secure

Login

* Email

* Password

[Forgot your password?](#)

Login

New to Coupa? [CREATE AN ACCOUNT](#)





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Completing the registration form



Filling out the supplier registration form

Once you have completed the CSP requirements, it is possible to access your profile to complete the Alberta Blue Cross form.

1. Find the form on the CSP, click **Profile** and then on **Information Request**. The form will be displayed.
2. Complete the required fields, the mandatory fields marked with a **red asterisk (*)**.



If you already have a CSP profile, some information might already be filled out based on the information already added to the CSP profile.

The screenshot shows the COUPA Supplier Portal interface. The navigation bar at the top includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Business Performance', 'Sourcing', 'Add-ons', and 'Setup'. The 'Profile' tab is selected. Below the navigation bar, there are tabs for 'Your Profile', 'Information Requests', and 'Coupa Verified'. The 'Information Requests' tab is active, showing the 'Alberta Blue Cross' profile. A blue circle with the number '1' highlights the 'Profile' tab. The main content area displays 'Supplier Information' for 'AN test 6_20'. A blue circle with the number '2' highlights the 'Primary Address' section, which contains the following fields: 'Address Purpose' (Select Some Options), '* Region' (United States), 'Country/Region' (United States), 'State Region' (New York - NY), 'State ISO Code' (US-NY), 'Address Name', '* Street Address' (33 IRVING PL FL 10), and 'Street Address 2'.



Section 1—supplier information

1. **Primary Address** is a mandatory field. Note this is the business address and not payment address information.
2. **Industry** is a non-mandatory field; however, select the most fitting answer from the drop-down menu.

The screenshot shows a registration form titled '* Primary Address'. A blue circle with the number '1' points to the 'Address Purpose' field, which is set to 'Branch'. Another blue circle with the number '2' points to the 'Industry' dropdown menu at the bottom of the form, which is set to 'Accounting, bookkeeping and auditing activities; tax consultancy'. The form includes the following fields:

- Address Purpose:** Branch
- * Region:** United States
- Country/Region:** United States
- State Region:** New York - NY
- State ISO Code:** US-NY
- Address Name:** (empty)
- * Street Address:** 33 IRVING PL FL 10
- Street Address 2:** (empty)
- Street Address 3:** (empty)
- Street Address 4:** (empty)
- * City:** NEW YORK
- * Postal Code:** 10003
- Location Code:** (empty)
- Industry:** Accounting, bookkeeping and auditing activities; tax consultancy



Section 1—supplier information

Within the form some fields might have conditional functionality. Based on the answer provided, further details or attachments might be required.

- 3. GST Exception**—if the answer is **Yes**, a mandatory attachment field will be displayed.
- 4. Subject to Withholding Tax**—if the answer is **Yes**, a mandatory attachment field will be displayed.

* Preferred Currency

* GST/ Tax ID Number ⓘ

* GST Exemption ✕ ▾

* GST Exemption Letter No file chosen
If the vendor is exempted from GST, the GST exemption letter must be attached.

4 * Subject to Withholding Tax ✕ ▾

* Subject to Withholding Attachment No file chosen
If the vendor is exempted from withholding taxes, the tax exemption letter must be attached.



Section 2—legal form

Within the form some fields might have conditional functionality. Based on the answer provided further details or attachments might be required.

1. **Supplier legal form as individual**—if the supplier is an individual, the **SIN Number** is a required field.
2. **Supplier legal form not as individual**—if the supplier is not an individual a certificate of incorporation must be provided.

* Supplier Legal Form Individual

* Supplier Legal as Individual? Yes

1 * SIN Number

This screenshot shows the registration form for a supplier legal form as an individual. The 'Supplier Legal Form' dropdown is set to 'Individual'. The 'Supplier Legal as Individual?' dropdown is set to 'Yes'. A blue circle with the number '1' highlights the 'SIN Number' field, which is currently empty.

* Supplier Legal Form Corporation

* Supplier Legal as Individual? No

2 Certificate of Incorporation

Effective Date mm/dd/yy

* Expiration Date mm/dd/yy

* Attachments Add File

This screenshot shows the registration form for a supplier legal form not as an individual. The 'Supplier Legal Form' dropdown is set to 'Corporation'. The 'Supplier Legal as Individual?' dropdown is set to 'No'. A blue circle with the number '2' highlights the 'Certificate of Incorporation' section. This section includes 'Effective Date' and '* Expiration Date' fields, both with calendar icons. Below these fields is an '* Attachments' section with 'Add' and 'File' buttons.



Section 2—supplier certificates

A workers' compensation certificate is required; however, if no workers' compensation certificate is present, it is possible to provide an exemption letter.

1. **Workers' compensation certificate**—if the answer is **Yes**, then an attachment is mandatory.
2. **No workers' compensation certificate**—if the answer is **No**, then an exception field for further details is required. Note that an attachment is still mandatory.

* Do you have a Workers Compensation Certificate (WCB)? No

1 * Provide Exception Information

* Workers Compensation Insurance

2

Effective Date mm/dd/yy

* Expiration Date 06/20/23

* Attachments Add File

- 6V4A1973.jpg

Description

If no WCB, then provide a Letter of exception.





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Filling out remit-to information

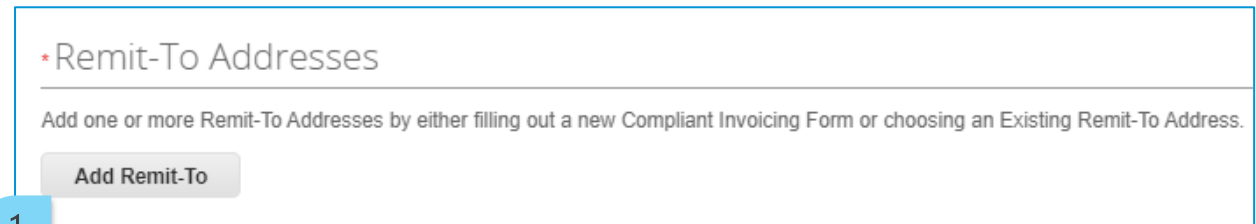


Adding remit-to information in the CSP

The **Remit-To Addresses** section ensures that Alberta Blue Cross has the essential banking and payment details to conduct business.

To update this information:

1. Within the form, click the **Add Remit-To** button.



*Remit-To Addresses

Add one or more Remit-To Addresses by either filling out a new Compliant Invoicing Form or choosing an Existing Remit-To Address.

Add Remit-To



Adding remit-to information in the CSP

A pop-up window will open to create the remit-to address.

2. If you already have a remit-to address registered in the CSP, select the remit-to address by clicking **Choose** and then complete the information required by Alberta Blue Cross in the main form.
3. If you do not have a remit-to address registered in the CSP, click the **Create New Remit-To Address** button.

Choose Remit-To Address

Choose a Remit-to Location below - Recommended
It's a few more fields, but provides compliance, verification, and re-usability. Otherwise, click 'Cancel' to add info to your customer's form manually.

Choose existing or create new Remit-To Address:

33 IRVING PL FL 10
NEW YORK, New York 10003
United States
United States

2 Choose

+ Create New Remit-To Address

3

Cancel



Adding remit-to information in the CSP

4. Complete the fields according to the instructions provided then click **Continue**.

Where's your business located?

Setting up your business details in Coupa will help you meet your customer's invoicing and payment requirements. For best results with current and future customers, complete as much information as possible.

* Legal Entity Name

* Country/Region

This is the official name of your business that is registered with the local government and the country/region where it is located.

4



Adding remit-to information in the CSP

5. Once all the CSP required steps are completed click the **Done** button.

Where do you ship goods from? ×

1 2 3 4

For many countries/regions including different shipping details on the invoice is required if they are different to where your legal entity is registered. Add Ship From

Title	Status	
33 IRVING PL FL 10 NEW YORK NY 10003 United States	Active	Manage

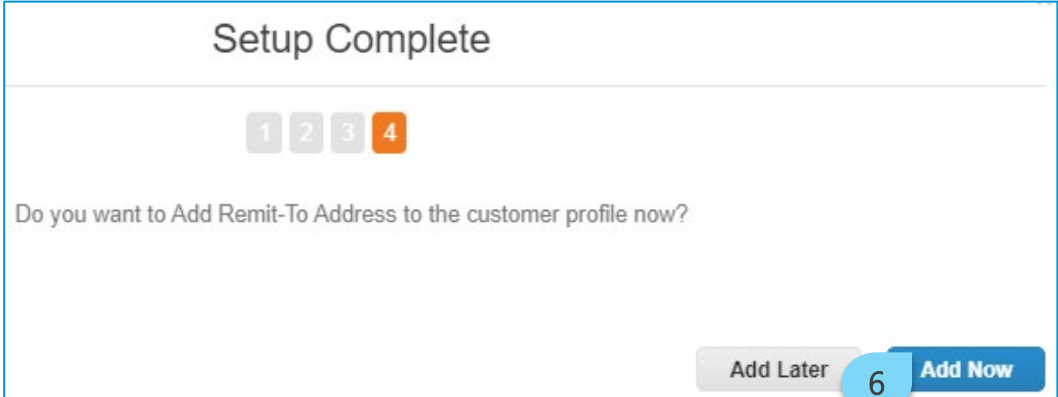
Deactivate Legal Entity Done

5



Adding remit-to information in the CSP

6. To add to the information completed to the Alberta Blue Cross form, click **Add Now** in the pop-up window. Once completed, you will be redirected to the Alberta Blue Cross form.



The screenshot shows a 'Setup Complete' dialog box. At the top, it says 'Setup Complete'. Below that is a progress indicator with four numbered steps: 1, 2, 3, and 4. Step 4 is highlighted in orange. Below the progress indicator is the question: 'Do you want to Add Remit-To Address to the customer profile now?'. At the bottom right, there are two buttons: 'Add Later' and 'Add Now'. The 'Add Now' button is highlighted with a blue circle containing the number 6, indicating the step to click.



Remit-to address information

1. Remit To Contact Email is a required field for remit-to information to be sent out to the supplier contact.
2. Remit To Address Information is added from the completed CSP profile.

* Remit-To Information

Remit To Address Information

1 * Remit To Contact Email

2 Country/ Province

Country/Region United States

State Region New York - NY

State ISO Code US-NY

Street Address 33 IRVING PL FL 10

Street Address 2

City NEW YORK

Postal Code/ Zip Code 10003



Remit-to account information

1. **Account type** is a non-required field to include account type information.
2. Select information from the drop-down menu for **Account Currency**.
3. Select information from the drop-down menu for **Payment Method**.



Based on the payment method selected, ensure to provide the required information to avoid rejections on your form.

The screenshot shows a form titled "Account Information" with three numbered callouts: 1 points to the "Account Type" text input field with a placeholder "Checking, Saving, etc."; 2 points to the "* Account Currency" dropdown menu which is set to "CAD"; 3 points to the "* Payment Method" dropdown menu which is open, showing options: "CAD EFT" (highlighted in orange), "Cheque", "USD ACH", and "Wire Transfer".

Please note for each Payment Method the following is required:

CAD EFT: Bank Name, Bank Number, Transit Number, Account Number, and Bank Letter (Attachment).

Cheque: Remit To Address Information.

USD ACH: Bank Name, Bank Address, Bank Routing/ABA Number, Account Number, and Bank Letter (attachment).

Wire: Bank Name, Bank Address, Bank Routing Number/ABA Number, Account Number, Swift Code, and Bank Letter (attachment).



Remit-to banking information

1. Based on the payment method selected, provide banking information.
2. If **CAD EFT** is selected as the payment method, then the **Transit Number** is a mandatory field.
3. If **Wire** is selected as the payment method, then **SWIFT Code (BIC)** is a mandatory field.
4. Based on the payment method selected, supporting banking documents might be required.

The screenshot shows a form titled "Banking Information" with the following fields and callouts:

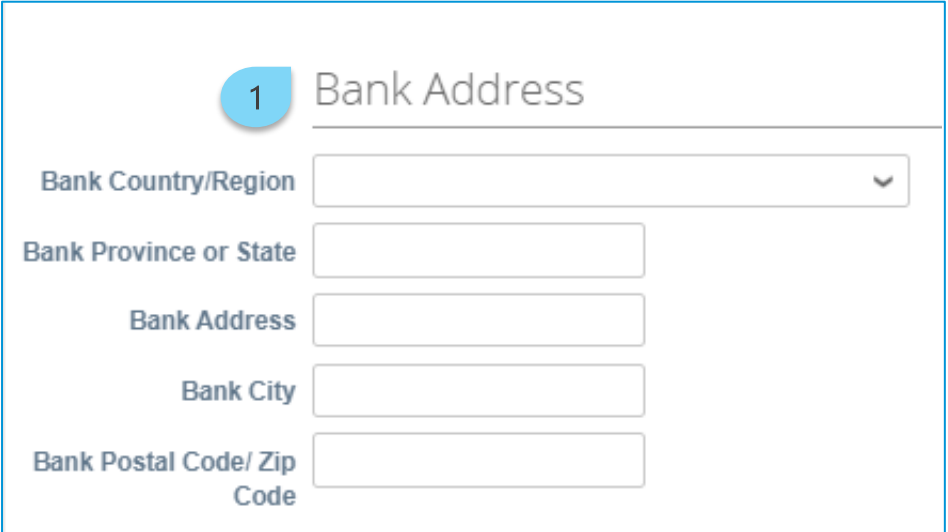
- 1** Banking Information
- Bank Name**
- 2** * **Transit Number** *i*
- Bank Number/Routing/ABA** *i*
- Bank Account Number** *i*
- 3** * **SWIFT Code (BIC)** *i*
- 4** Banking Supporting Document (Void Check or Bank Letter)
 Attachments Add [File](#)

Required for CAD EFT, USD ACH, and Wire Transfer



Remit-to banking address

1. **Bank Address** is a non-mandatory field for banking address information. However, it is required for USD ACH and Wire payment method.



The screenshot shows a form titled "1 Bank Address" with a blue circle containing the number "1" next to the title. The form contains five input fields:

- Bank Country/Region**: A dropdown menu with a downward arrow.
- Bank Province or State**: A text input field.
- Bank Address**: A text input field.
- Bank City**: A text input field.
- Bank Postal Code/ Zip Code**: A text input field.





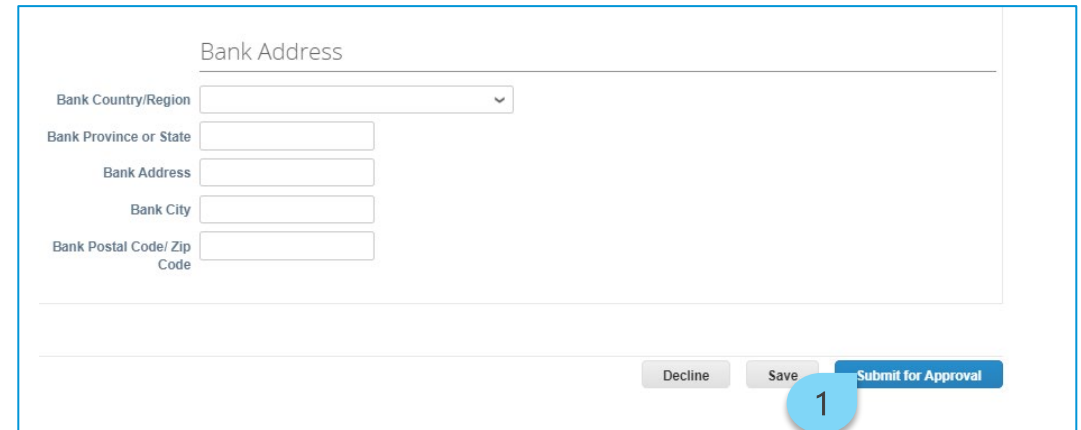
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Submitting the supplier registration form



Submit the registration form

1. Once all the supplier information and remit-to information is completed, at the end of the form, click **Submit for Approval** to send the form to Alberta Blue Cross for review and approval.



The screenshot shows a form section titled "Bank Address". It contains the following fields:

- Bank Country/Region: A dropdown menu.
- Bank Province or State: A text input field.
- Bank Address: A text input field.
- Bank City: A text input field.
- Bank Postal Code/ Zip Code: A text input field.

At the bottom right of the form, there are three buttons: "Decline", "Save", and "Submit for Approval". A blue circle with the number "1" is overlaid on the "Submit for Approval" button, indicating the step to be taken.



Notification of approval

After Alberta Blue Cross has verified the data provided in the form and all elements have been validated, an email notification will be received.



The same notification will be received once an update form has been approved.

The screenshot shows an email notification from Alberta Blue Cross. At the top left, there are two logos: the Alberta Blue Cross logo (a blue cross with 'ALBERTA BLUE CROSS' text) and the Alberta Health Services logo (a blue cross with a shield). Below the logos, the subject line reads 'Profile Info submitted to Alberta Blue Cross was Approved'. The main body of the email starts with 'Hi Supplier,' followed by a paragraph: 'The company profile information that you submitted to your customer, Alberta Blue Cross was recently approved.' This is followed by another paragraph: 'This usually means that the information was correct and they will activate your new information so you can start transacting soon (or continue transacting with the new information).' The final paragraph states: 'No further action is required but you can click below to view additional details.' At the bottom of the email, there is a light blue background with a dark orange rounded rectangular button that says 'View Profile Info' in white text.

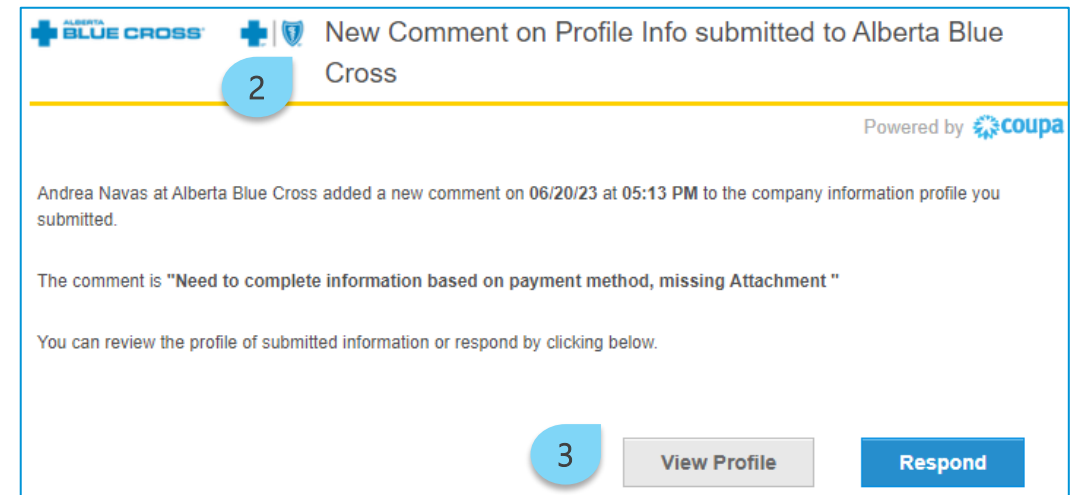
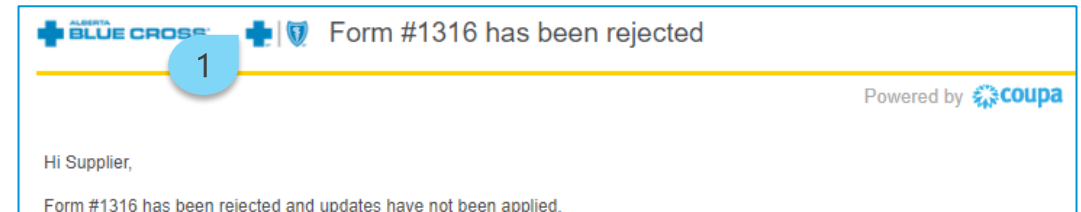


Notification of refusal

1. If the form is rejected after Alberta Blue Cross has verified the data provided in the form, the supplier will receive an email notification.
2. You will receive a second notification with the comments from Alberta Blue Cross.
3. Click **Respond** or **View Profile** to review the form and resubmit.



The same notification will be received once an update form has been rejected.



Review refusal in the CSP profile

You will receive an email notification if the form is rejected after Alberta Blue Cross has verified the data provided in the form.



The same notification will be received once an update form has been approved.

The screenshot shows an email notification from Alberta Blue Cross. At the top left, there is the Alberta Blue Cross logo, which includes the text "ALBERTA BLUE CROSS" and a blue cross icon. To the right of the logo is a shield icon. Below the logo, the subject line of the email is "Profile Info submitted to Alberta Blue Cross was Approved". The body of the email starts with "Hi Supplier," followed by a paragraph: "The company profile information that you submitted to your customer, Alberta Blue Cross was recently approved." This is followed by another paragraph: "This usually means that the information was correct and they will activate your new information so you can start transacting soon (or continue transacting with the new information)." The final paragraph states: "No further action is required but you can click below to view additional details." At the bottom of the email content, there is a blue button with the text "View Profile Info".





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Updating your information



Updating your information

You can communicate changes to Alberta Blue Cross, by updating information in the CSP.

1. Click **Profile** and then on **Information Requests**.
2. Scroll to the bottom of the page and click the **Update Info** button.



Updates are only allowed for suppliers with access to the CSP.

The screenshot shows the top navigation bar with the following items: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, Sourcing, Add-ons, and Setup. Below the navigation bar, there are three tabs: Your Profile, Information Requests (highlighted with a red underline), and Coupa Verified. A blue circle with the number '1' is positioned over the 'Profile' tab. Below the tabs, the text 'Alberta Blue Cross' is displayed. To the right, there is a dropdown menu labeled 'Profile' with 'Alberta Blue Cross' selected.

The screenshot shows a form titled 'Bank Address' with the following fields: Bank Country/Region (United States), Bank Province or State, Bank Address, Bank City, and Bank Postal Code/ Zip Code. A blue circle with the number '2' is positioned over the 'Update Info' button at the bottom right of the form.



Updating your information

1. The form fields are now editable. Make the necessary updates.
2. Click the **Submit for Approval** button to send the update to Alberta Blue Cross.

Supplier Information AN test 6_20

Supplier Information

1 * Primary Address

Address Purpose ⓘ

* Region

Country/Region

State Region

State ISO Code

Address Name

* Street Address

Decline Save **Submit for Approval** 2



Notification for update to supplier form

You will receive a notification once the update information has been sent out to Alberta Blue Cross for review.



Profile Info Recently Updated for Alberta Blue Cross on Coupa

Hi Anna,

Your company's profile information was recently updated and sent to Alberta Blue Cross on Coupa. This information is important and can contain pay-to information, tax registration, compliance certification information, and more.

Please help us ensure security by notifying your customer if this change is inaccurate or unexpected. If the change is expected you can ignore this message.

Thanks!





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CSP administration





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Managing users



Inviting users to the CSP

As CSP admin, you can invite users within your organization to be part of the CSP. This will help if you need other users in your organization to manage the company's CSP profile.

1. To access the admin page, click **Setup**.
2. Click **Invite User**.

The screenshot shows the Coupa Supplier Portal interface. At the top, the user is logged in as ANDREA with 6 notifications. The navigation bar includes Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, and Sourcing. A 'Setup' button is highlighted with a red circle and the number 1. Below the navigation bar, the 'Admin Users' section is visible. A red circle with the number 2 highlights the 'Invite User' button. The 'Users' table contains the following data:

User Name	Email	Status	Permissions	Customer Access	Actions
Andrea Navas	andrea.navas11@gmail.com	Active	ASNs, Admin, Business Performance, Catalogs, Early	Alberta Blue Cross - AN test 4_12_1, Alberta Blue Cross - An test 4_19 4, Alberta Blue	Edit



Send invitation

1. A pop-up window is displayed. Fill out the contact information.
2. Select the permissions and customers you would like the new user to have access to.
3. Click **Send Invitation**.

The screenshot shows a 'Invite User' pop-up window. At the top, there are three input fields for 'First Name', 'Last Name', and 'Email'. A blue circle with the number '1' is positioned to the left of these fields. Below the input fields, there are two columns of checkboxes. The left column is titled 'Permissions' and the right column is titled 'Customers'. A blue circle with the number '2' is positioned to the left of the 'Permissions' section. The 'Permissions' section includes options for 'All', 'Admin', 'Orders', 'Restricted Access to Orders', 'Invoices', 'Catalogs', 'Profiles', 'ASNs', 'Service/Time Sheets', 'Restricted Access to Service/Time Sheets', 'Payments', 'Order Changes', 'Early Payments', 'Business Performance', 'Sourcing', and 'Order Line Confirmation'. The 'Customers' section includes options for 'All' and several 'Alberta Blue Cross - AN test' entries with dates. A blue circle with the number '3' is positioned to the left of the 'Send Invitation' button at the bottom right of the window.





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Updating a remit-to record



Adding a remit-to record

To add a remit-to record through the *Admin* tab:

1. Click **Setup**.
2. Click **Remit-To**.
3. Click **Add Remit-To**.

The screenshot shows the 'Admin Remit-To' page in the Coupa Supplier Portal. The top navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Business Performance', and 'Sourcing'. Below this, there are 'Add-ons' and 'Setup' buttons. A blue circle with the number '1' is placed over the 'Setup' button. The main content area has a sub-header 'Admin Remit-To' and a left sidebar with various menu items. A blue circle with the number '2' is placed over the 'Remit-To' menu item. The main table displays a list of remit-to records with columns: 'Remit-To Account', 'Remit-To Address', 'Payment Type', 'Legal Entity', 'Customers', and 'Actions'. A blue circle with the number '3' is placed over the 'Add Remit-To' button in the top right corner of the table area.

Remit-To Account	Remit-To Address	Payment Type	Legal Entity	Customers	Actions
None	33 IRVING PL FL 10 NEW YORK NY 10003 United States Preferred Language: English (US)	Address	Test remit address	✓ Alberta Blue Cross - AN test 4_12_1 ✓ Alberta Blue Cross - An test 4_19_4 ✓ Alberta Blue Cross - AN test 4_20_5 ✓ Alberta Blue Cross - AN test 05_22_1 ✓ Alberta Blue Cross - An test 05_22_2	



Adding a remit-to record

4. A pop-up window is displayed.
Select **Legal Entity** to apply the remit-to record. This record is previously created.
5. Click **Next**.

Add Remit-To

4 Legal Entity Test remit address

Invoice From Address 33 IRVING PL FL 10
NEW YORK, NY, 10003
United States

Back 5 Next



Adding a remit-to record

6. Fill in the fields.
7. Select the customer that the account can be used by.
8. Click **Save & Continue**.

Add a new Remit-To account

6 * Payment Type Bank Account

What are your Bank Account Details? ⓘ

Bank Account Country/Region: United States

State: Select an Option

Which customers can use this account?

7

- All
- Alberta Blue Cross - AN test 4_12_1
- Alberta Blue Cross - An test 4_19 4
- Alberta Blue Cross - AN test 4_20_5
- Alberta Blue Cross - AN test 05_22 1
- Alberta Blue Cross - An test 05_22 2

Cancel Save & Continue 8



Adding a remit-to record

9. The new remit-to address is added to the list of remit-to records.



To include a new remit-to record to the Alberta Blue Cross profile, ensure to follow the [update profile](#) steps.

Remit-To Account	Remit-To Address	Payment Type	Legal Entity	Customers	Actions
None	33 IRVING PL FL 10 NEW YORK NY 10003 United States Preferred Language: English (US)	Address	Test remit address	✓ Alberta Blue Cross - AN test 4_12_1 ✓ Alberta Blue Cross - An test 4_19_4 ✓ Alberta Blue Cross - AN test 4_20_5 ✓ Alberta Blue Cross - AN test 05_22_1 ✓ Alberta Blue Cross - An test 05_22_2	



Adding customers to a remit-to record

It is possible to add customers to an already created remit-to record through the *Admin* tab.

1. Click **Setup**.
2. Click **Remit-To**.
3. Click on the **Leave** icon under **Actions**.

The screenshot displays the 'Admin Remit-To' page in the Coupa Supplier Portal. The top navigation bar includes 'Home', 'Profile', 'Orders', 'Service/Time Sheets', 'ASN', 'Invoices', 'Catalogs', 'Business Performance', and 'Sourcing'. A 'Setup' button is highlighted with a blue circle and the number '1'. Below the navigation bar, the 'Admin' tab is selected, and the 'Remit-To' option in the left sidebar is highlighted with a blue circle and the number '2'. The main content area shows a table with the following data:

Remit-To Account	Remit-To Address	Payment Type	Legal Entity	Customers	Actions
None	33 IRVING PL FL 10 NEW YORK NY 10003 United States Preferred Language: English (US)	Address	Test remit address	✓ Alberta Blue Cross - An test 4_12_1 ✓ Alberta Blue Cross - An test 4_19_4 ✓ Alberta Blue Cross - AN test 4_20_5 ✓ Alberta Blue Cross - AN test 05_22_1 ✓ Alberta Blue Cross - An test 05_22_2	⚙️

A blue circle with the number '3' highlights the 'Leave' icon in the Actions column of the table. An 'Add Remit-To' button is located in the top right corner of the table area.



Adding customers to a remit-to record

4. A pop-up window is displayed. Under **Add Additional Customers**, click the drop-down menu and select the customer.
5. Click **Add Selected**.
6. Click **Next**.

The screenshot shows the 'Edit Remit-To Usage' window. At the top, it displays 'Legal Entity Test remit address' and 'Remit-To 33 IRVING PL FL 10, NEW YORK, NY, 10003, United States'. Below this, it asks 'Which customers can use this account?'. A search bar is present with a dropdown menu open, showing 'Alberta Blue Cross' as a selected option. A blue circle with the number '4' is next to the search bar, and a blue circle with the number '5' is next to the 'Add Selected' button. Below the search bar, there is a table with columns 'Customer', 'Status', and 'Date added'. The table contains two rows, both for 'Alberta Blue Cross' with status 'Active and Validated' and date '08/11/23'. A blue circle with the number '6' is next to the 'Next' button at the bottom right.

Legal Entity Test remit address
Remit-To 33 IRVING PL FL 10, NEW YORK, NY, 10003, United States
33 IRVING PL FL 10
NEW YORK, NY, 10003
United States

Which customers can use this account?

4 Add Additional Customers

5 Add Selected

Pay. Remit-to
e customer when
if the customer
use account types
through Coupa Pay.

Customer	Status	Date added
Alberta Blue Cross	Active and Validated	08/11/23
Alberta Blue Cross	Active and Validated	08/11/23

6 Next



Adding customers to a remit-to record

7. The new added customer is displayed in the remit-to record.

Remit-To Account	Remit-To Address	Payment Type	Legal Entity	Customers	Actions
None	33 IRVING PL FL 10 NEW YORK NY 10003 United States Preferred Language: English (US)	Address	Test remit address	<ul style="list-style-type: none">✓ Alberta Blue Cross - AN test 4_12_1✓ Alberta Blue Cross - An test 4_19_4✓ Alberta Blue Cross - AN test 4_20_5✓ Alberta Blue Cross - AN test 05_22_17 ✓ Alberta Blue Cross - An test 05_22_2	 





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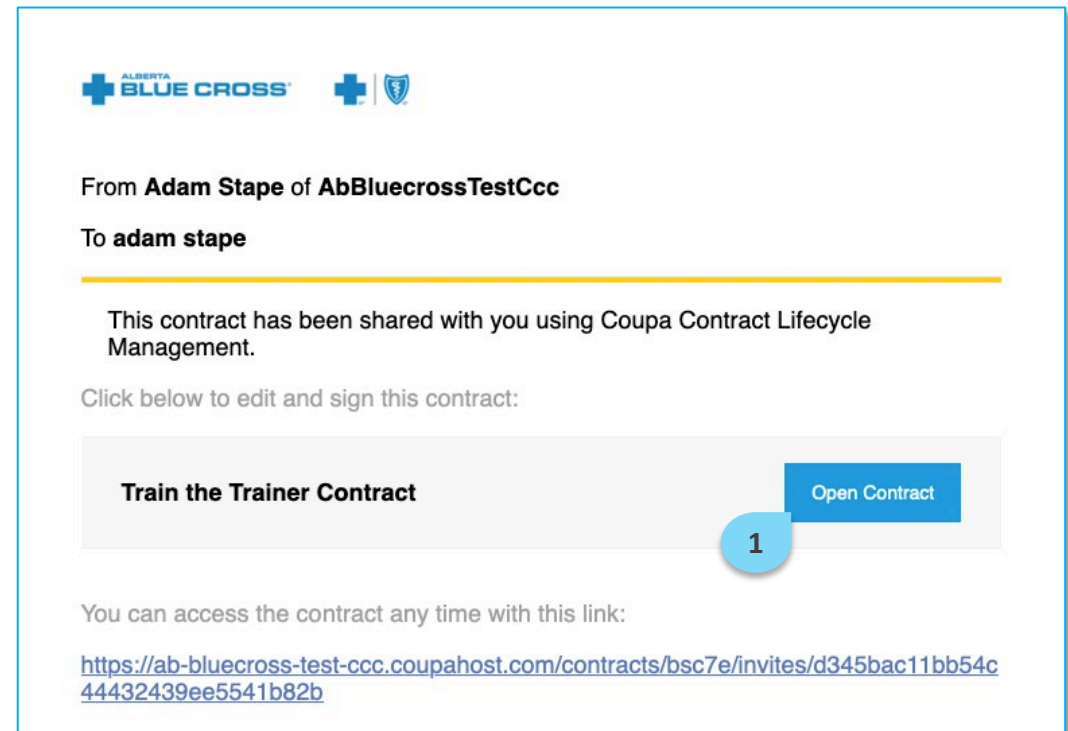
Negotiating contracts through the CSP



Notification to negotiate

You will receive an email from Coupa when it is time to negotiate terms and conditions of a contract.

1. Access the email from `do_not_reply@ab-bluecross-ccc.coupahost.com` and click **Open Contract**.



Download or upload the contract

2. Click **Edit Document** and select **Download for Edit**.
3. Review the document and provide any redlines or comments in Microsoft Word.
4. Upload the reviewed document by clicking **Upload**.
5. When you are ready to send the contract back to Alberta Blue Cross, click **Send to Counterparty**.



Coupa will provide a quick 4-step tour guide to support contract negotiation for first time collaborators.

The screenshot displays the Coupa Supplier Portal interface for a contract titled "Train the Trainer Contract". The document is a "Services Agreement" from Alberta Blue Cross, dated June 8, 2023. The document text includes the Alberta Blue Cross logo, the title "Services Agreement", and the beginning of the agreement text: "This Services Agreement (this 'Agreement'), dated as of June 8, 2023 (the 'Effective Date'), is by and between: Company A, a JURISDICTION corporation, with offices located at Supplier Primary Address Street1, Supplier Primary Address City, Supplier Primary Address State, Supplier Primary Address Country/Region, Supplier Primary Address Postal Code ('Service Provider') and ABC BENEFITS CORPORATION, an Alberta corporation, with offices located at 10009 108 Street NW, Edmonton, Alberta ('ABC' and together with Service Provider, the 'Parties', and each a 'Party')." The interface includes a top navigation bar with "BLUE CROSS" and "OPTIS CONSULTING NETWORK INC | HELP". On the right side, there is a "Draft" status indicator and a "Send to Counterparty" button. Below this, there is an "Additional Actions" section with buttons for "Compare Versions", "Fields", "Messages", and "Full History". At the bottom, there is a "Counterparties" section with a dropdown menu showing "AbBluecrossTestCcc" and "OPTIS CONSULTING NETWORK INC". Three numbered callouts are present: '2' points to the "Edit Document" button, '4' points to the "Send to Counterparty" button, and '5' points to the "Additional Actions" section.



Additional actions

The *Additional Actions* section houses the following options:

- **Compare Versions**—see who checked in a particular version and at what time. Deleted text is shown in red, and additions are shown in green.
- **Fields**—list all fields built into the contract that can be changed (e.g., Effective Date, Supplier Name, etc.). Fields can be populated here to quickly update the contract.
- **Messages**—use the message board to communicate and track messages internally and externally.
- **Full History**—a log of all actions taken on the agreement including the name of the user who took the action and the date and time it was taken. Actions that are logged include changes to and comments on the agreement, invitation of reviewers and their acceptance to review.

The screenshot displays the COUPA Supplier Portal interface for a contract titled "Train the Trainer Contract". The document is a "Services Agreement" between Alberta Blue Cross and ABC Benefits Corporation. The "Additional Actions" sidebar on the right is highlighted with a red box and contains the following options: Compare Versions, Fields (9), Messages, and Full History. Below the sidebar, the "Counterparties" section lists "AbBluecrossTestCcc" and "OPTIS CONSULTING NETWORK INC". The top right of the interface shows "OPTIS CONSULTING NETWORK INC" and "HELP".





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Completing risk questionnaires



Completing risk questionnaires

Access the risk questionnaire

Depending on the nature of the goods and/or services, you may be required to complete 1 or more risk assessments prior to receiving a signed contract or approved purchase order.

1. Access the email from noreply@ab-bluecross.risk-mail.coupahost.com and click the **R.Portal** link.
2. Enter your CSP credentials and click **Sign In**.

The top screenshot shows an email notification from Coupa Risk Assess. The header reads "coupa | Risk Assess". The main heading is "Business Continuity Control is ready to complete". The body text says "Hello Maddie," followed by a paragraph: "Thank you for your interest in providing services to Alberta Blue Cross. We require all our third-party representatives, suppliers and partners to complete a due diligence screening process prior to executing an agreement and periodically while providing services. As such, we kindly ask that you complete the online Business Continuity Control by 7/16/2023. You can access this by clicking on the [R.Portal](#)." A blue callout bubble with the number "1" points to the "R.Portal" link. Below this is another paragraph: "Please do not hesitate to contact your Alberta Blue Cross contact should you have any questions about the due diligence process." and a "Thank you for your cooperation in this important process." footer. A disclaimer is visible at the bottom.

The bottom screenshot shows the "Sign In" page of the Coupa Risk Assess portal. The header says "Welcome to Coupa Risk Assess, your solution for third-party management." The "Sign In" section has fields for "User name" and "Password", with "Forgot username?" and "Forgot password?" links. A blue "Sign In" button is at the bottom left. A blue callout bubble with the number "2" points to the "Sign In" button. To the right, there are sections for "COUPA BUSINESS SPEND MANAGEMENT" and "RESOURCES".



Access the risk questionnaire

3. Access risk assess and open the evaluations by clicking **Show Me All**.
4. Search for the applicable questionnaire and click **View**.

The screenshot displays the 'Action Items' section for a 'Personal' user. It features three summary cards: 'Evaluations' (2 items, 0 late, 1 due this week, 1 due later), 'Approvals' (2 items, 0 late, 0 action required, 2 waiting), and 'Action Plans' (0 items, 0 not started, 0 in process, 0 awaiting approval). Below these is a table titled 'Evaluations: All' with columns for Name, Periodicity, Start Date, Context, Status, Due Date, Action Status, and Action. Two items are listed: 'Risk Summary Approval' and 'Inherent Risk Questionnaire'. The 'Inherent Risk Questionnaire' item has a blue circle with the number '4' overlaid on its 'View' button. A pagination bar at the bottom shows '1 - 2 of 2 items'.

Name	Periodicity	Start Date	Context	Status	Due Date	Action Status	Action
Risk Summary Approval	One Time	6/7/2023	NS Test CLMCRA (2306071002 CRA Script Development-221)	Not Started	6/17/2023	A	View
Inherent Risk Questionnaire	One Time	6/11/2023	NS Test CLMCRA (2306120959 TTT-227)	Not Started	6/21/2023		View



Respond to a risk questionnaire

5. Respond to the questions.
6. Click **Submit**.

Alberta Blue Cross will review your submission and contact you if any next steps are required.

Evaluation Delegate Recalc Save Cancel Submit

Risk-Inherent Risk Questionnaire [NS Test CLMCRA (2306120959 TTT-227)] - Onetime - Period Start 12 Jun 23

6

Export Import

Risk

Information Gathering

Item #	Description	Score	Actions
1.0	BEFORE YOU BEGIN: Please review the instructions below.		0
<p><i>As part of our ongoing efforts to ensure the security and resilience of our organization, we are conducting a comprehensive Third-Party Risk Assessment. Your valuable input is vital to this process, and we kindly request your assistance in completing the assessment.</i></p> <p><i>At Alberta Blue Cross, we recognize the importance of effectively managing risks associated with our third-party relationships. This assessment aims to evaluate and mitigate any potential risks posed by our external vendors, suppliers, or service providers.</i></p> <p><i>Should you have any questions or require further clarification, please do not hesitate to contact Procurement. We are here to assist you throughout the process and address any concerns you may have.</i></p>			
1.1	Would it be likely that the outsourced product or service to a third party provider expand more than three (3) years OR have an annual spend greater or equal than \$500,000 CAD?	--	0
1.2	Would it be likely that the outsourced product or service to a third party provider process, transmit, store and/or have direct or indirect access to company data?	--	0

5





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Managing purchase orders (POs) and invoices



View and manage POs

To view your POs from Alberta Blue Cross

1. Click the **Orders** tab.
2. Orders will be visible in the table. Click the **PO Number** to see more details.

The screenshot shows the Coupa Supplier Portal interface. At the top, the user is logged in as 'MADDIE' with 5 notifications. The navigation menu includes Home, Profile, Orders (highlighted with a blue circle and '1'), Service/Time Sheets, ASN, Invoices, Catalogs, Business Performance, Sourcing, Add-ons, and Setup. Below the navigation, there are sub-tabs for Orders, Order Changes, Order Line Changes, Order Confirmations, Order Confirmation Lines, Promised Deliveries, and Shipments. The 'Orders' sub-tab is selected. A 'Select Customer' dropdown menu is set to 'Alberta Blue Cross'. The main heading is 'Purchase Orders'. Below this, there are instructions from the customer: 'Please acknowledge all Purchase Orders coming from ABC. This is located as a checkbox inside of the PO.' A call to action says 'Click the [icon] Action to Accept the Purchase Order and Create an Invoice using its data'. Below this is a table with columns: PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, Assigned To, and Actions. The table contains two rows of data. A blue circle with '2' is placed over the first row's PO Number (690). The table also has an 'Export to' dropdown, a 'View' dropdown set to 'All', and a search bar.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Assigned To	Actions
690	08/02/23	Issued	None	Maintenance	No	35,000.00 CAD		[icon]
689	08/02/23	Issued	None	400 Each of Widgit 400 Each of Service	No	196,000.00 CAD		[icon]



Acknowledge POs

Alberta Blue Cross requires you to acknowledge receipt of the purchase order.

1. Within the purchase order, click the **Acknowledged** checkbox.



The purchase order table in the *Orders* tab identifies which purchase orders have been acknowledged in the *Acknowledged At* column.

Purchase Order #689

Order marked as sent manually and acknowledged

General Info

Status Issued - Pending Manual
Order Date 08/02/23
Revision Date 08/02/23
Requester Sam Bowyer
Email sbowyer@ab.bluecross.ca
Payment Term NET 30
Attachments None
Acknowledged
Assigned 1

Shipping

Ship-To Address 715 5 Avenue SW
Calgary, AB T2P 2X6
Canada
Location Code: ABCcalgary
Attn: Sam Bowyer
Terms None

Shipment Tracking

No shipment tracking. [+ Add](#)



Create an invoice/credit note from a PO

1. Click the **Orders** tab.
2. Click on the **Create Invoice** icon (📄) or **Credit Note** icon (📄) for the PO in the *Purchase Orders* table to flip the PO into an invoice.
 - Alternatively, to create an invoice, click the **PO Number** link to open the purchase order and click **Create Invoice**.



By 'flipping' the PO to an invoice or credit note directly, the CSP will pre-populate most of the fields, making it easy and accurate.

The screenshot shows the Coupa Supplier Portal interface. At the top, there are navigation tabs: Home, Profile, Orders, Service/Time Sheets, ASN, Invoices, Catalogs, Add-ons, and Admin. The 'Orders' tab is selected and highlighted with a blue circle containing the number '1'. Below the navigation, there is a section titled 'Purchase Orders' with 'Instructions From Customer' and a table of purchase orders. The table has columns for PO Number, Order Date, Status, Acknowledged At, Items, Unanswered Comments, Total, and Actions. The first row is highlighted with a blue circle containing the number '2'.

PO Number	Order Date	Status	Acknowledged At	Items	Unanswered Comments	Total	Actions
09902000000240	06/26/19	Issued	None	1 Each of Test PO Item2	No	100.00 CAD	📄📄
09902000000239	06/26/19	Issued	None	2 Each of Test PO Item	No	200.00 CAD	📄📄
09902000000168	01/15/19	Issued	None	3 Each of Test	No	30.00 CAD	📄📄



Create an invoice/credit note from a PO

3. Populate the *General Info* section.
4. Update the Quantity (*Qty*) or *Price*.
5. Update the *Taxes* field.
6. Click **Calculate** to update the invoice or credit note total.
7. Click **Submit**.

You will be directed to the *Invoices* screen with a message stating your invoice or credit note is in pending approval status.

The screenshots illustrate the 'Create Invoice' process in the Coupa Supplier Portal. The first screenshot shows the 'General Info' section with a '3' in a blue circle. The second screenshot shows the 'Lines' section with a '4' in a blue circle. The third screenshot shows the 'Totals & Taxes' section with a '5' in a blue circle. At the bottom right, there are two blue circles with '6' and '7' inside them.

Type	Description	Qty	UOM	Price
PO Line 689-1	Wogl	400	Each	215.00
PO Line 689-2	Service	400	Each	275.00

Tax Description	Tax Rate	Tax Amount	Tax Reference
	0.000	0.00	

Tax Description	Tax Rate	Tax Amount	Tax Reference
	0.000	0.00	



Tax Description	Tax Rate	Tax Amount	Tax Reference
	0.000	0.00	

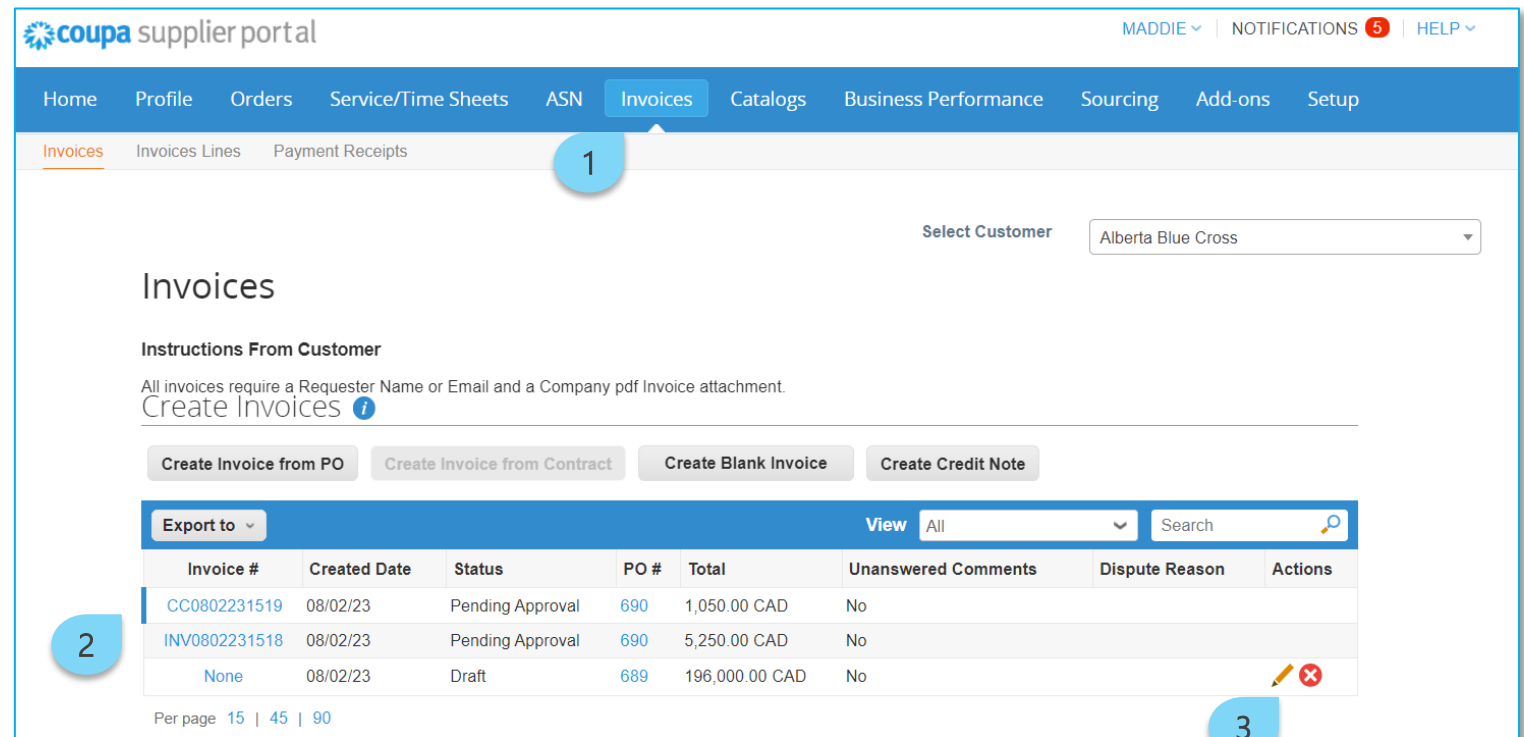
Totals & Taxes	
Lines Net Total	196,000.00
Lines Tax Totals	0.00
Shipping	
Tax	
Tax Reference	Enter a tax reason description.
Handling	
Tax	
Tax Reference	Enter a tax reason description.
Misc	
Tax	
Tax Reference	Enter a tax reason description.
Total Tax	0.00
Net Total	196,000.00
Total	196,000.00

Buttons: Delete, Cancel, Save as Draft, Calculate, Submit



Viewing and editing an invoice

1. Click the **Invoices** tab.
2. Invoices and their status will be visible in the table. Click the **Invoice #** to see more details.
3. Click  to edit or  to delete a draft invoice.



coupa supplier portal MADDIE ▾ | NOTIFICATIONS 5 | HELP ▾

Home Profile Orders Service/Time Sheets ASN **Invoices** Catalogs Business Performance Sourcing Add-ons Setup

Invoices Invoices Lines Payment Receipts



Select Customer

Invoices

Instructions From Customer
All invoices require a Requester Name or Email and a Company pdf Invoice attachment.
Create Invoices ⓘ

Create Invoice from PO Create Invoice from Contract Create Blank Invoice Create Credit Note

Export to ▾ View All ▾ Search 🔍

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
CC0802231519	08/02/23	Pending Approval	690	1,050.00 CAD	No		
INV0802231518	08/02/23	Pending Approval	690	5,250.00 CAD	No		
None	08/02/23	Draft	689	196,000.00 CAD	No		 

Per page 15 | 45 | 90



Create a non-backed invoice/credit note

If Alberta Blue Cross allows you, you can create a non-backed (no PO or contract) invoice by doing the following:

1. Click the Invoices tab.
2. Click Create Blank Invoice or Create Credit Note.

The screenshot shows the Coupa Supplier Portal interface. At the top, the user is logged in as MADDIE with 5 notifications. The navigation bar includes Home, Profile, Orders, Service/Time Sheets, ASN, Invoices (highlighted with a blue circle and '1'), Catalogs, Business Performance, Sourcing, Add-ons, and Setup. Below the navigation bar, there are sub-tabs for Invoices, Invoices Lines, and Payment Receipts. A 'Select Customer' dropdown menu is set to 'Alberta Blue Cross'. The main heading is 'Invoices'. Underneath, there are 'Instructions From Customer' and a note that all invoices require a Requester Name or Email and a Company pdf Invoice attachment. Below this, there are four buttons: 'Create Invoice from PO', 'Create Invoice from Contract', 'Create Blank Invoice' (highlighted with a blue circle and '2'), and 'Create Credit Note'. A table below shows a list of invoices with columns for Invoice #, Created Date, Status, PO #, Total, Unanswered Comments, Dispute Reason, and Actions. The table contains three rows: one for invoice CC0802231519 (Pending Approval, PO # 690, Total 1,050.00 CAD), one for invoice INV0802231518 (Pending Approval, PO # 690, Total 5,250.00 CAD), and one for a draft invoice (Draft, PO # 689, Total 196,000.00 CAD). The bottom of the page shows 'Per page 15 | 45 | 90'.



Creating a contract invoice

Some contracts with Alberta Blue Cross may allow you to invoice the contract directly without a PO (e.g., statements of work or mobility plans). You can invoice a contract directly by doing the following:

1. Click the **Invoices** tab.
2. Click **Create Invoice from Contract**.

coupa supplier portal MADDIE ▾ | NOTIFICATIONS 5 | HELP ▾

Home Profile Orders Service/Time Sheets ASN **Invoices** Catalogs Business Performance Sourcing Add-ons Setup

Invoices Invoices Lines Payment Receipts



Select Customer

Invoices

Instructions From Customer
All invoices require a Requester Name or Email and a Company pdf Invoice attachment.
Create Invoices ⓘ

Create Invoice from PO **Create Invoice from Contract** **Create Blank Invoice** **Create Credit Note**

Export to ▾ **2** View All

Invoice #	Created Date	Status	PO #	Total	Unanswered Comments	Dispute Reason	Actions
CC0802231519	08/02/23	Pending Approval	690	1,050.00 CAD	No		
INV0802231518	08/02/23	Pending Approval	690	5,250.00 CAD	No		
None	08/02/23	Draft	689	196,000.00 CAD	No		 

Per page 15 | 45 | 90



PO and invoice statuses

PO statuses

Status	Description
Buyer hold	The PO is approved but requires Alberta Blue Cross to review it.
Cancelled	The PO is cancelled and does not need to be fulfilled.
Closed	The issued PO was received and then closed either manually or automatically within Coupa.
Currency hold	The PO is on hold due to a currency exchange rate issue.
Error	Something is wrong with the PO. Contact Alberta Blue Cross to get the PO back on track.
Issued	The PO was approved and sent to you.
Soft closed	The PO is closed but can be reopened. You cannot invoice against a PO in this status.
Supplier window hold	The PO was approved outside of the order window schedule under contract terms.

Invoice statuses

Status	Description
Abandoned	The disputed invoice has been abandoned.
Approved	The invoice has been accepted for payment by Alberta Blue Cross.
Disputed	The invoice has been disputed.
Draft	The invoice has been created, but it has not been submitted to Alberta Blue Cross yet.
Pending approval	The invoice is currently under review by Alberta Blue Cross.
Processing	The invoice is being processed by the Accounts Payable department and should be paid soon.
Voided	Something is wrong with the invoice. Contact Alberta Blue Cross to get the invoice back on track.





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Conducting business without joining the CSP



Utilizing Supplier Actionable Notification

SAN stands for **S**upplier **A**ctionable **N**otification. SAN will allow you to act on items processed by Alberta Blue Cross out of Coupa directly.

SAN features the following:

- You can control everything via your email inbox by action buttons.
- The service is free but has limited functionality.
- You can register for the CSP at any point later if you wish to no longer use SAN.

With SAN you can



Fill in onboarding forms.



Receive POs.



Act on received POs.

With SAN you *cannot*



Update your company information.



Respond to rejected forms.



Efficiently track your POs and Invoices.





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Registering as a supplier without joining the CSP



Notification of information request

If you decide not to join the CSP, it is possible to complete the form directly in your browser.

1. When you receive the email invitation, click the **Respond Without Joining** button, and you will be redirected to the form page.



Alberta Blue Cross strongly recommends creating a CSP profile in order to better track your interactions with Alberta Blue Cross. Note that without a CSP profile it is not possible to update your company information without external support from Alberta Blue Cross.

ALBERTA BLUE CROSS

Alberta Blue Cross Profile Information Request - Action Required

Dear valued supplier,

Alberta Blue Cross® would like to onboard your company through Coupa, our online procurement system.

The Coupa Supplier Portal makes it easy to provide and update your company information, manage POs, submit invoices, and track approval statuses. Coupa offers a wide range of benefits, including those listed below and more:

- **It's free.** You will not be charged for hosting or accessing the Coupa Supplier Portal. You can network with other vendors and electronically manage orders without any fees.
- **Get paid quicker.** By joining the Coupa Supplier Portal, you'll be part of our standard procurement process. This means you'll receive purchase orders sooner, invoice authorizations will happen faster, and you'll get paid quicker.
- **Expediate contracting.** Submit and update all necessary questionnaires to help expedite the contracting process.
- **Save time, money, and the environment.** The Coupa Supplier Portal eliminates paper purchase orders and the printing and mailing of paper invoices. This results in fewer manual steps for your employees, faster turn-around times, and more time for your employees to focus on strategic work. You'll also use less paper, creating a smaller ecological footprint and helping to keep our planet green.
- **Quick to set up and easy to use.** No technology installations or additional software are required to access the Coupa Supplier Portal. All you need is internet access and an email account.
- **Stay updated.** Joining the Coupa Supplier Portal allows you to manage your information with Alberta Blue Cross, such as your address, banking, and remit to address. You can update any changes to your company and banking details to ensure further swift payment.

To get started with the Coupa Supplier Portal, select the Join and Respond button below. You can also send your information to Alberta Blue Cross without joining the Coupa Supplier Portal by selecting Respond Without Joining. However, if you respond without joining, you cannot update your company information through the Coupa Supplier Portal. Any future updates will be done manually and could potentially add time to contracting and payment.

[Join and Respond](#) **1** [Respond Without Joining](#)



Filling out the form via SAN

When you click the **Respond Without Joining** button, you will be redirected to the form page.

1. Complete the required fields as explained in the section [completing the registration form](#).

ALBERTA BLUE CROSS

Supplier Information AN test 6_20

Supplier Information

1 * Primary Address

Address Purpose

* Region

Country/Region

State Region

State ISO Code

Address Name

* Street Address

Street Address 2

Street Address 3

Street Address 4

* City

* Postal Code

Location Code

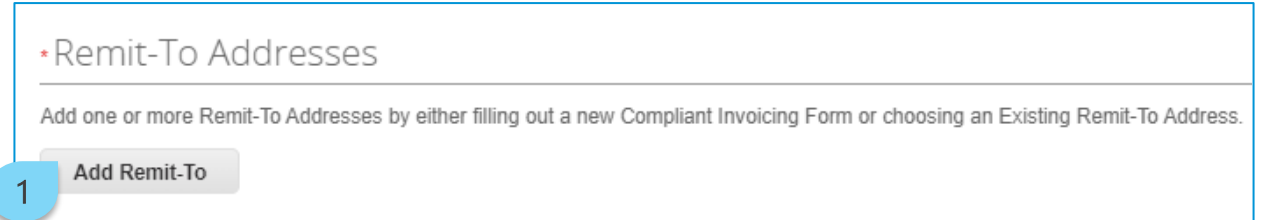
Decline Submit



Remit-to from SAN

The *Remit-To Addresses* section ensures that Alberta Blue Cross has the essential banking and payment details to conduct business.

1. To add a new remit-to, click the **Add Remit-To** button.



Registering as a supplier without joining the CSP

Remit-to from SAN

A new section is displayed for the remit-to information to be added.

Complete the required fields as explained in the section [filling out remit-to information](#).

* Remit-To Information

Remit To Address Information ✕

* Remit To Contact Email ⓘ

Country/ Province

Country/Region

State Region

State ISO Code

Street Address

Street Address 2

City

Postal Code/ Zip Code

Account Information

Account Type

Checking, Saving, etc.

* Account Currency

* Payment Method

Please note for each Payment Method the following is required:

CAD EFT: Bank Name, Bank Number, Transit Number, Account Number, and Bank Letter (Attachment).
Cheque: Remit To Address Information.
USD ACH: Bank Name, Bank Address, Bank Routing/ABA Number, Account Number, and Bank Letter (attachment).



Submit the form

1. Once all information has been completed, click **Submit**.

ALBERTA BLUE CROSS

Supplier Information AN test 6_20

Supplier Information

* Primary Address

Address Purpose

* Region

Country/Region

State Region

State ISO Code

Address Name

* Street Address

Street Address 2

Street Address 3

Street Address 4

* City

* Postal Code

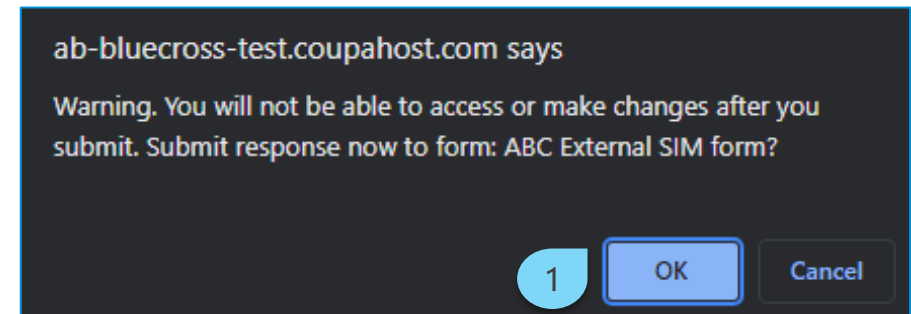
Location Code

1



Submit the form

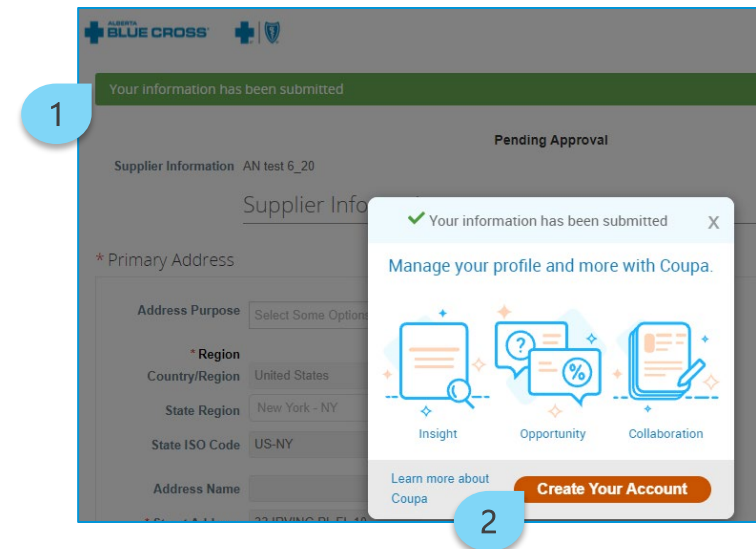
1. After clicking on **Submit**, a pop-up window will appear, informing the supplier that they will not be able to access the form or make any changes after submission. Click **OK** to submit the form.



Registering as a supplier without joining the CSP

Submit the form

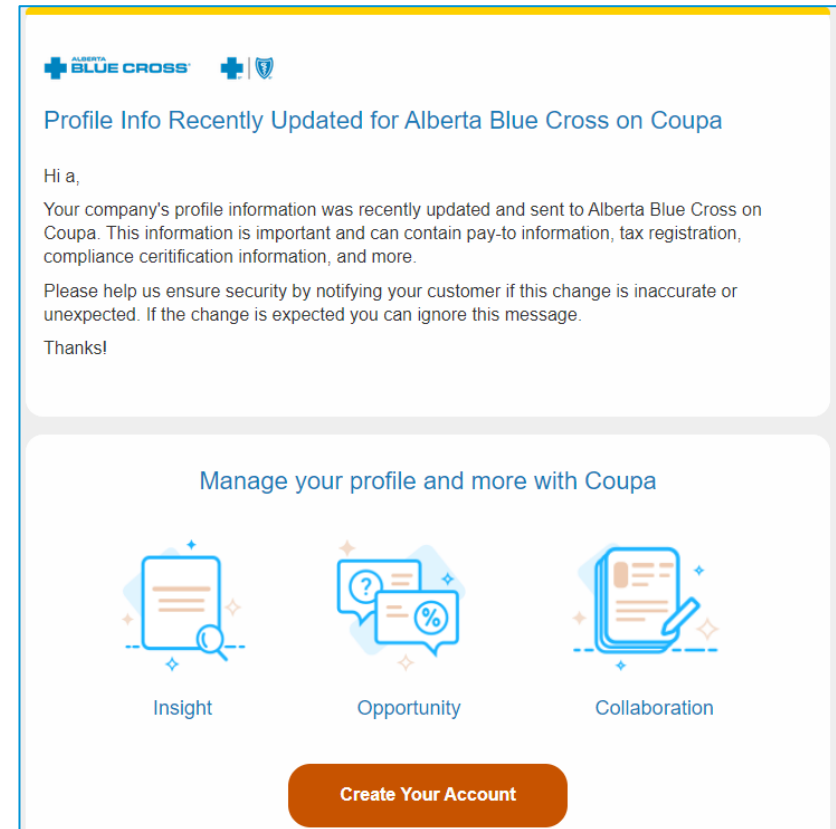
1. A message will be displayed confirming the submission of the form to Alberta Blue Cross.
2. A pop-up window is displayed with the possibility of creating a CSP profile. If you wish to create a profile, click **Create Your Account**. Otherwise, click the X on the top right of the window.



Registering as a supplier without joining the CSP

Form submission notification

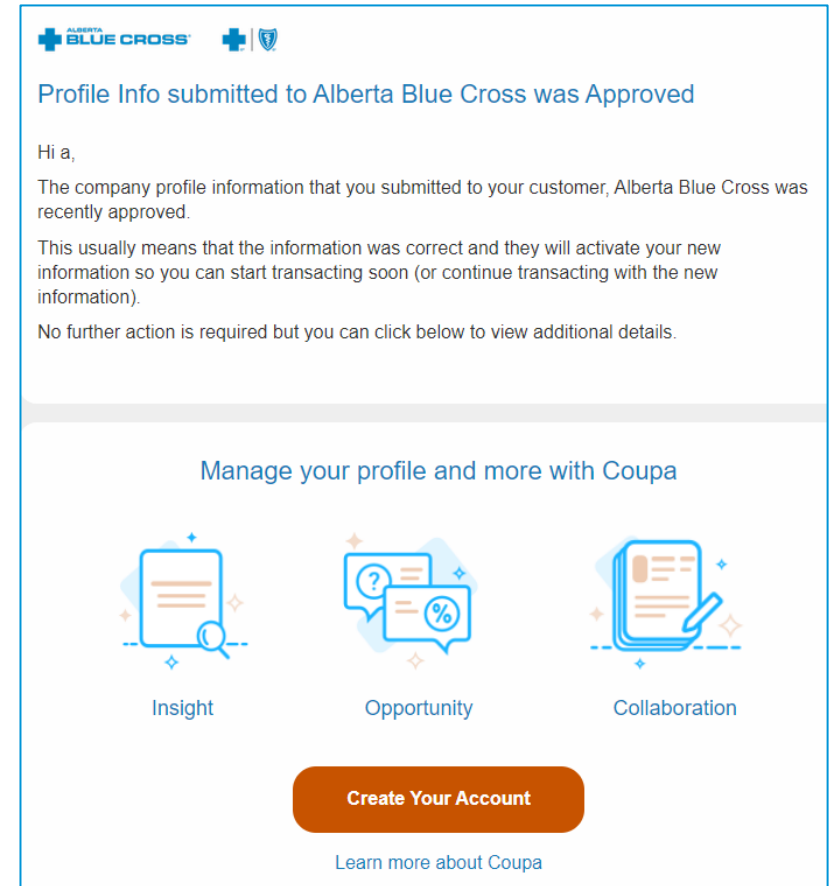
Once the form is submitted to Alberta Blue Cross, you will receive an automatic email confirming that information has recently been updated.



Registering as a supplier without joining the CSP

Form approval notification

Once the form is reviewed and approved by Alberta Blue Cross, you will be notified with an automatic email.



The screenshot shows an email notification from Alberta Blue Cross. At the top, the Alberta Blue Cross logo is displayed. The subject line reads "Profile Info submitted to Alberta Blue Cross was Approved". The body of the email starts with "Hi a," followed by a message stating that the company profile information submitted to the customer, Alberta Blue Cross, has been recently approved. It explains that this usually means the information was correct and that the user's new information will be activated soon, allowing them to start or continue transacting. It concludes by stating that no further action is required but provides a link to view additional details. Below the text is a section titled "Manage your profile and more with Coupa" which features three icons: "Insight" (a document with a magnifying glass), "Opportunity" (two speech bubbles with a question mark and a percentage sign), and "Collaboration" (a document with a pencil). At the bottom of this section is a prominent orange button labeled "Create Your Account" and a smaller link that says "Learn more about Coupa".



Form refusal notification

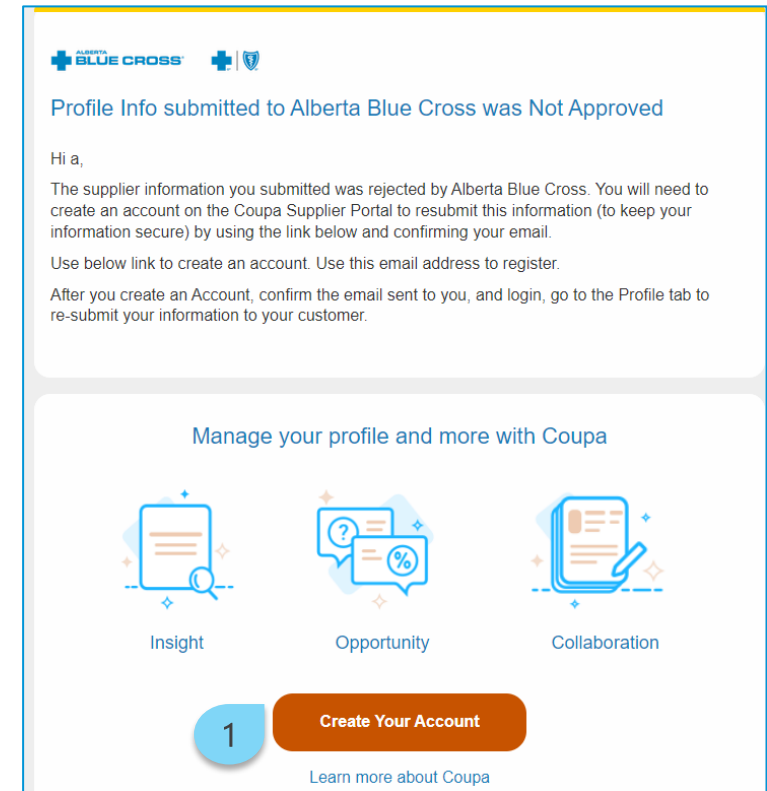
If the form is rejected, you will receive an email notification saying that the submission was not approved.

To resubmit your information

1. Click the **Create Your Account** button.



You must join the CSP first to re-submit your information.





[Go back home](#)

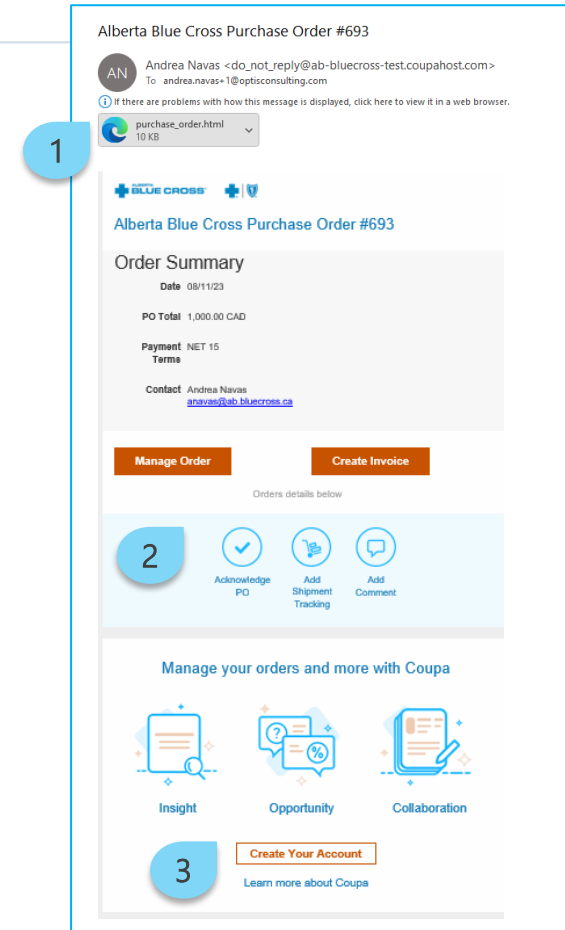
Managing POs and invoices without joining the CSP



Receiving POs

Once you open the email, a brief overview of the PO will become available.

1. PO number and attachment.
2. Actionable buttons
 - Acknowledge PO.
 - Add Shipment Tracking.
 - Add Comment.
3. The **Create Your Account** button is available if you want to create an account in the CSP, but it is not required for processing POs via SAN.



Manage order

It is possible to manage and review the PO from the email notification.

1. Click **Manage Order**.

The screenshot displays the 'Order Summary' for 'Alberta Blue Cross Purchase Order #693'. The summary includes the following details:

- Date:** 08/11/23
- PO Total:** 1,000.00 CAD
- Payment Terms:** NET 15
- Contact:** Andrea Navas, anavas@ab.bluecross.ca

Below the summary, there are two prominent orange buttons: 'Manage Order' and 'Create Invoice'. A blue circle with the number '1' is overlaid on the 'Manage Order' button, indicating the first step. Underneath these buttons, the text 'Orders details below' is centered. At the bottom of the interface, there are three circular icons with corresponding labels: a checkmark icon for 'Acknowledge PO', a shopping cart icon for 'Add Shipment Tracking', and a speech bubble icon for 'Add Comment'.



Manage order

2. Click the **Acknowledged** checkbox under the *General Info* section.
3. Review line information.
4. Create invoices by clicking **Create Invoice**.
5. Add comments by clicking **Add Comment**.

Purchase Order #693

General Info

Status: Issued - Sent via Email
Order Date: 08/11/23
Revision Date: 08/11/23
Requester: Andrea Navas
Email: anavas@ab.bluecross.ca
Payment Term: NET 15
Attachments: None
Acknowledged:
Assigned to:

Shipping

Ship-To Address: 10009 108 St NW
Blue Cross Place
Edmonton, AB T5J 3C5
Canada
Location Code: ABCHeadOffice
Attn: Andrea Navas
Terms: None
Shipment Tracking: [+](#)
No shipment tracking.

Lines

Type	Item	Qty	Unit	Price	Total	Invoiced
	Consulting service	10	Hours	100.00	1,000.00	0.00

Supplier Part Number: None | Manufacturer Name: None | Manufacturer Part Number: None

Total CAD: 1,000.00

Comments

Enter Comment:

Add Comment



Receiving POs—PO attachment

Once you receive the PO through email, the following is available attached on the email:

1. Supplier information.
2. Ship to information.
3. PO information and Alberta Blue Cross contact information.
4. Bill to information.
5. Line description.

ALBERTA BLUE CROSS

Alberta Blue Cross PURCHASE ORDER

1 Telephone company 8_11
1619 Crag Ln
Raleigh, california 27604
Attn: anna smith
andrea.navas+1@opticonsulting.com
Phone: +1 (818) 234-5689

2 Ship To
Alberta Blue Cross
10009 108 St NW
Blue Cross Place
Edmonton, AB T5J 3C5
Canada
ABCHeadOffice
Attn: Andrea Navas

3 PO NUMBER 693
DATE 08/11/23
PAYMENT TERMS NET 15
SHIPPING TERMS
CURRENCY CAD
CONTRACT 324
CONTACT Andrea Navas
anavas@ab.bluecross.ca

4 Bill To
Alberta Blue Cross
108 St NW
10009
Edmonton, AB T5J 3C5
Canada
Attn: Andrea Navas

Line	Description	Need By Date	Qty	Unit	Price	Total
1	Consulting service		10	Hours	100.00	1,000.00
						1,000.00 CAD



Acknowledge PO

Acknowledge PO allows you to directly acknowledge the PO and send the information back to Alberta Blue Cross.

1. Within the email received, click **Acknowledge PO**.

Alberta Blue Cross Purchase Order #693

Order Summary

Date 08/11/23

PO Total 1,000.00 CAD

Payment Terms NET 15

Contact Andrea Navas
anavas@ab.bluecross.ca

Manage Order **Create Invoice**

Orders details below

- 1 Acknowledge PO
- Add Shipment Tracking
- Add Comment



Acknowledge PO

2. A new browser window is displayed, and the order is automatically acknowledged.
3. The **Acknowledged** checkbox is automatically checked, and the Alberta Blue Cross buyer within Coupa will be able to see the date the PO was acknowledged.



If the PO needs to be un-acknowledgeable, click the checkbox again. However, ensure to inform the Alberta Blue Cross buyer.

Purchase Order #693

Order acknowledged

2

General Info

Status: Issued - Sent via Email
Order Date: 08/11/23
Revision Date: 08/11/23
Requester: Andrea Navas
Email: anavas@ab.bluecross.ca
Payment Term: NET 15
Attachments: None
Acknowledged:
Assigned to:

Shipping

Ship-To Address: 10009 108 St NW
Blue Cross Place
Edmonton, AB T5J 3C5
Canada
Location Code: ABCHeadOffice
Attn: Andrea Navas
Terms: None

3

Shipment Tracking

No shipment tracking.

Lines

Type	Item	Qty	Unit	Price	Total	Invoiced
	Consulting service	10	Hours	100.00	1,000.00	0.00

Supplier Part Number: None | Manufacturer Name: None | Manufacturer Part Number: None

Per page: 15 | 45 | 90

Total CAD **1,000.00**

Create Invoice Save Print View



Add shipment tracking

Adding shipping information can be used to enter detailed information about your delivery and tracking data.

1. Within the email received, click **Add Shipment Tracking**.

Alberta Blue Cross Purchase Order #693

Order Summary

Date 08/11/23



PO Total 1,000.00 CAD

Payment Terms NET 15


Contact Andrea Navas
anavas@ab.bluecross.ca

[Manage Order](#) [Create Invoice](#)

Orders details below

 **1** 

Acknowledge PO Add Shipment Tracking



Add Comment



Add shipment tracking

2. A new browser window is displayed.
3. Include the complete tracking number.
4. Select a carrier from the drop-down menu.
5. Click **Save**.



Note that only 1 tracking number can be added on a PO.

The screenshot shows a browser window titled "Create Shipment Tracker" with a close button in the top right corner. The window has a blue header with a truck icon and a star. Below the header, there is a text prompt: "Enter tracking number for entire PO. To ship PO partially, create ASN." The form contains three main input areas: a text field for the tracking number (callout 3), a dropdown menu for the carrier (callout 4), and a text area for a note. At the bottom right, there are two buttons: "Cancel" and "Save" (callout 5).



Add comments

Include any comments relevant to the PO that will provide additional information to Alberta Blue Cross.

1. Within the email received, click **Add Comment**.

The screenshot displays the 'Alberta Blue Cross Purchase Order #693' interface. At the top, the title 'Alberta Blue Cross Purchase Order #693' is shown in blue. Below this is a grey 'Order Summary' section containing the following details: 'Date 08/11/23', 'PO Total 1,000.00 CAD', 'Payment Terms NET 15', and 'Contact Andrea Navas' with the email address anavas@ab.bluecross.ca. Below the summary are two orange buttons: 'Manage Order' and 'Create Invoice'. Underneath these buttons, the text 'Orders details below' is centered. At the bottom of the interface is a light blue bar with three circular icons: a checkmark for 'Acknowledge PO', a shopping cart for 'Add Shipment Tracking', and a speech bubble for 'Add Comment'. A blue circle with the number '1' is overlaid on the 'Add Comment' icon, indicating the current step.



Acknowledge PO

2. Include the comments that will be visible to Alberta Blue Cross. Both ends will be notified when a new comment is added or if a response to one was created.
3. Click **Add Comment**.

Assigned to

Lines

Advanced Search Sort by Line Number: 0 → 9

1	Type	Item	Qty	Unit	Price	Total	Invoiced
		Consulting service	10	Hours	100.00	1,000.00	0.00

Supplier Part Number: None Manufacturer Name: None Manufacturer Part Number: None

Per page 15 | 45 | 90

Total CAD 1,000.00

Create Invoice Save Print View

Comments Mute Comments

Enter Comment

Enter your comment here.

Add File | URL

Send Comment notification to a user by typing @name (ex. @JohnSmith)

Add Comment



Create an invoice

Invoicing can be created directly from the email received.

1. Click **Create Invoice**.

Alberta Blue Cross Purchase Order #693

Order Summary

Date 08/11/23


PO Total 1,000.00 CAD


Payment Terms NET 15


Contact Andrea Navas
anavas@ab.bluecross.ca

Manage Order **1 Create Invoice**

Orders details below

 Acknowledge PO

 Add Shipment Tracking

 Add Comment



Create an invoice

2. Populate the *General Info* section.
3. Update the Quantity (*Qty*) or *Price*.
4. Update the *Taxes* field.
5. Click **Calculate** to update the invoice or credit note total.
6. Click **Submit**.

ALBERTA BLUE CROSS

Sign Out

Create Invoice

General Info

From

2

Lines

Type	Description	Qty	UOM
PO Line	Consulting service	10.0	Hours
693-1			

Service/Time Sheet Line
None

Credit Line
None

Supplier Part Number

Billing
108519-704040-1-00000-00000

Taxes

Tax Description	Tax Rate	Tax Amount
	0.000	0.00

Totals & Taxes

Lines Net Total	1,000.00
Lines Tax Totals	0.00

Shipping

Tax

Handling

Tax

Misc

Tax

Total Tax 0.00

Net Total 1,000.00

Total 1,000.00

Email me status updates for invoices I create this way

Delete Cancel Save as Draft Calculate Submit

4

5

6



Questions?

For more information regarding this supplier guide, review the frequently asked questions available on the supplier website or contact the Procurement team at PRC@ab.bluecross.ca.



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