

Powering K-C’s digital future



How to Complete a Periodic Recertification Request for Suppliers

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| Warning outline | **Your screen in the Coupa Supply Portal may differ slightly from this training, but the steps to complete the activity will be the same.** |
| Warning outline | **Your screen in the Coupa Supply Portal may differ slightly from this training, but the steps to complete the activity will be the same.** |



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|  | **This icon indicates there are further policy or business process details relating to a step. Click on the provided link(s) placed throughout the QRC for more information.** |

## Purpose

This Quick Reference Card (QRC) explains the process for responding to and completing a periodic recertification request.

* **Task 1:** Responding to and Completing a Periodic Recertification Questionnaire
* **Task 2:** Delegating a Response to a Periodic Recertification Questionnaire
* **Task 3:** Submitting Responses to a Periodic Recertification Questionnaire

## Key Terms

* + **Coupa Risk Assess (CRA)** is asystem that connects all parties involved in risk management to collaborate on reducing the cost of compliance, minimizing risk and maximizing the value of their relationships.
  + **Coupa Supplier Portal (CSP)** is a web portal designed to assist suppliers in managing their business transactions with Kimberly-Clark
  + **Due Diligence Questionnaires (DDQ)** are forms used both internally and externally to assist in evaluating retained information on a potential supplier’s data security, legal, financial, and other aspects of their organization to help identify and mitigate risk.
  + **Recertification** is the process of periodically reassessing the level of risk for suppliers via due diligence questionnaires.
  + **Risk Domains** are identified areas used to frame the types of controls that should be evaluated during supplier risk assessment to help guide risk management.

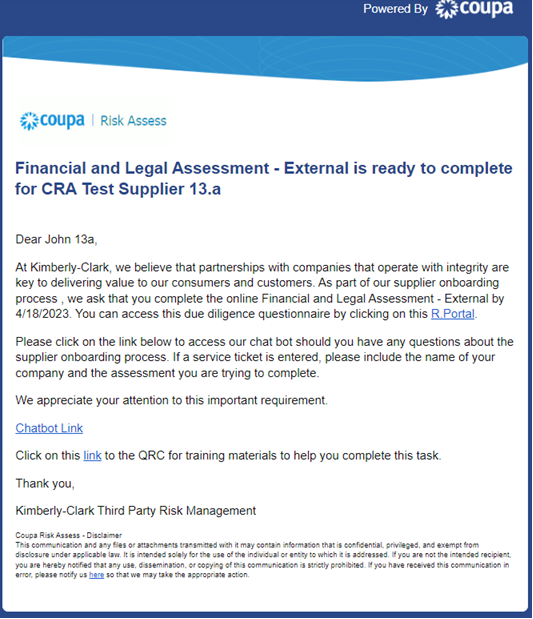
## Responding to and Completing a Periodic Recertification

Kimberly-Clark has varying Due Diligence Questionnaires to support its risk programs. Periodically, information gathering for recertification for in-scope areas of risk will be required. The completion of recertification questionnaires is an automated process that adheres to the predetermined recertification criteria from Kimberly-Clark.

Please follow the steps below to respond to and submit a periodic recertification questionnaire.

The individual designated as the CSP primary contact will receive an email notification from Kimberly-Clark with instructions.

1. Click the **R. Portal** linkto access the questionnaire.
   1. Suppliers can also access the Chatbot Link to communicate with Kimberly-Clark if further assistance is needed.
   2. Suppliers can also access additional training resources from Kimberly-Clark if further assistance is needed.



**1**

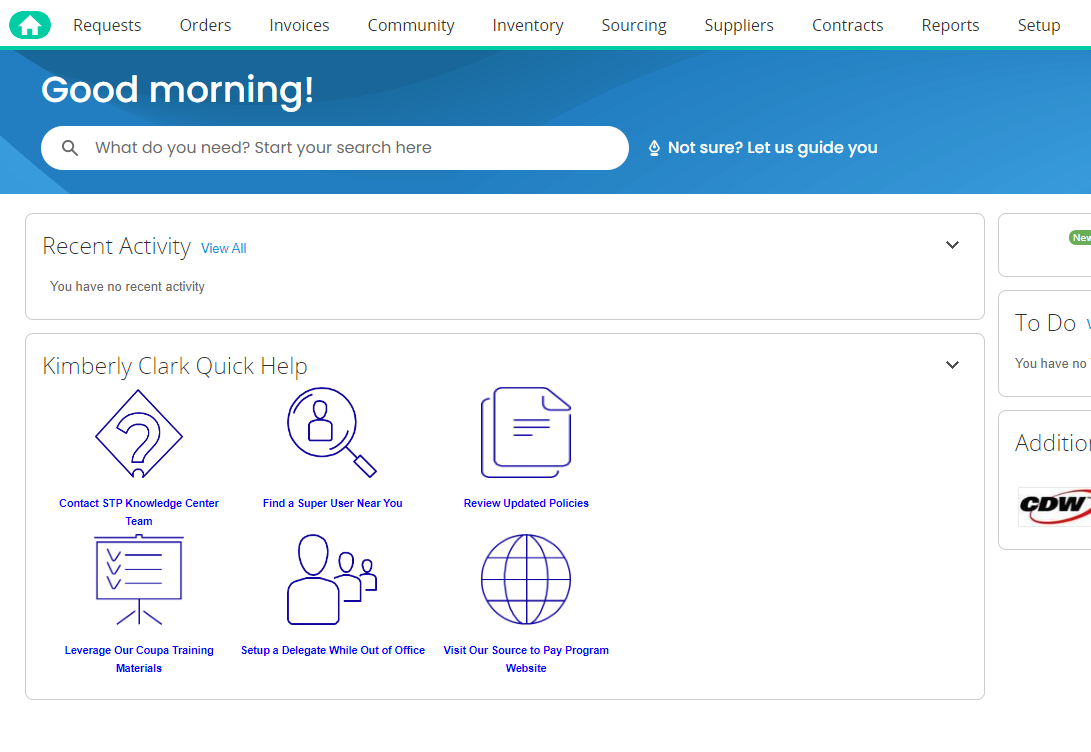
**1a**

**1b**

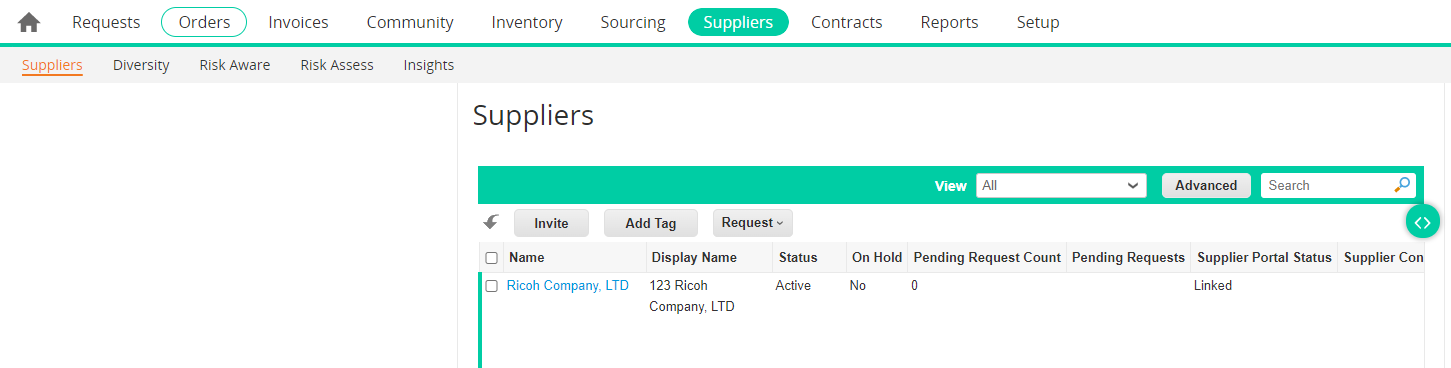
The **Coupa home screen** appears.

1. Click the **Suppliers** tab.

**2**



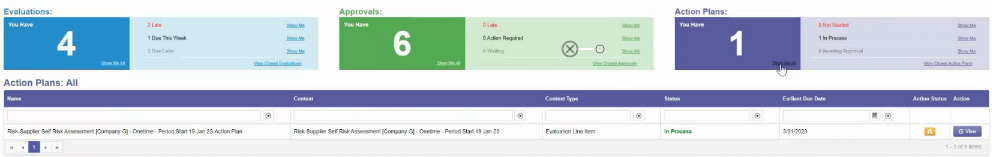
1. Click the **Risk Assess** subtab.



**3**

The **Coupa Risk Assess Dashboard** appears.

1. Locate the **Evaluations** tile and click the **Show Me All** link.
   * Review the list for open evaluations.
2. Click the **View** button to open the appropriate (pending) questionnaire.



**4**

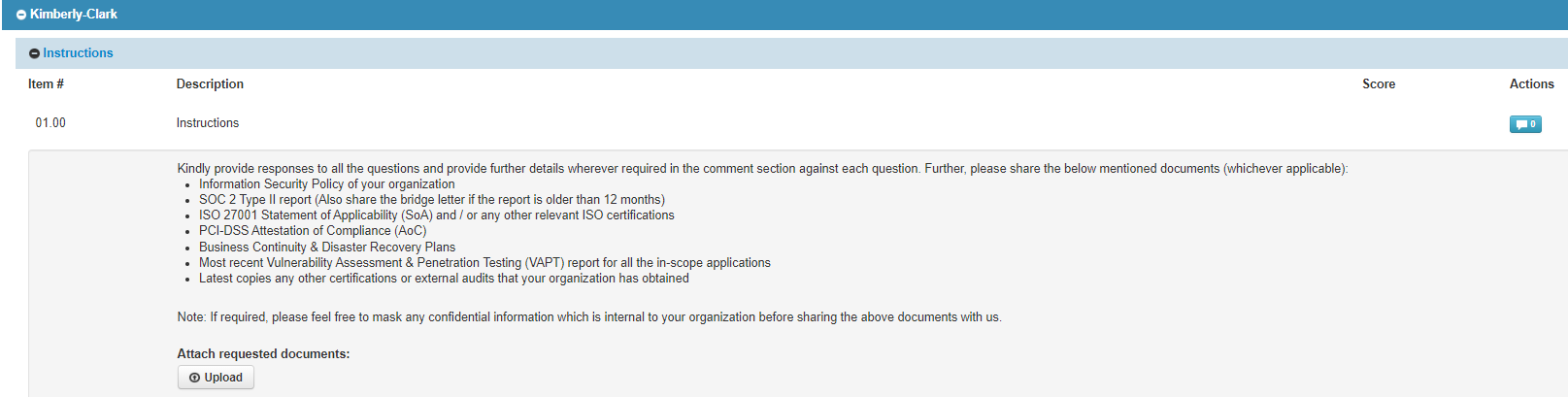
**5**

The Recertification form will load with prepopulated data that was provided at the initial form completion.

1. Click the **Instructions** link (if available) to expand the questionnaire’s instructions.

|  |  |
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|  | **Note:** Suppliers will only edit information on the form that needs to be updated and/or upload any supporting documentation.  Please provide those requested documents via upload where applicable. |

1. Click the **Upload** button to attach supporting documents (if applicable).

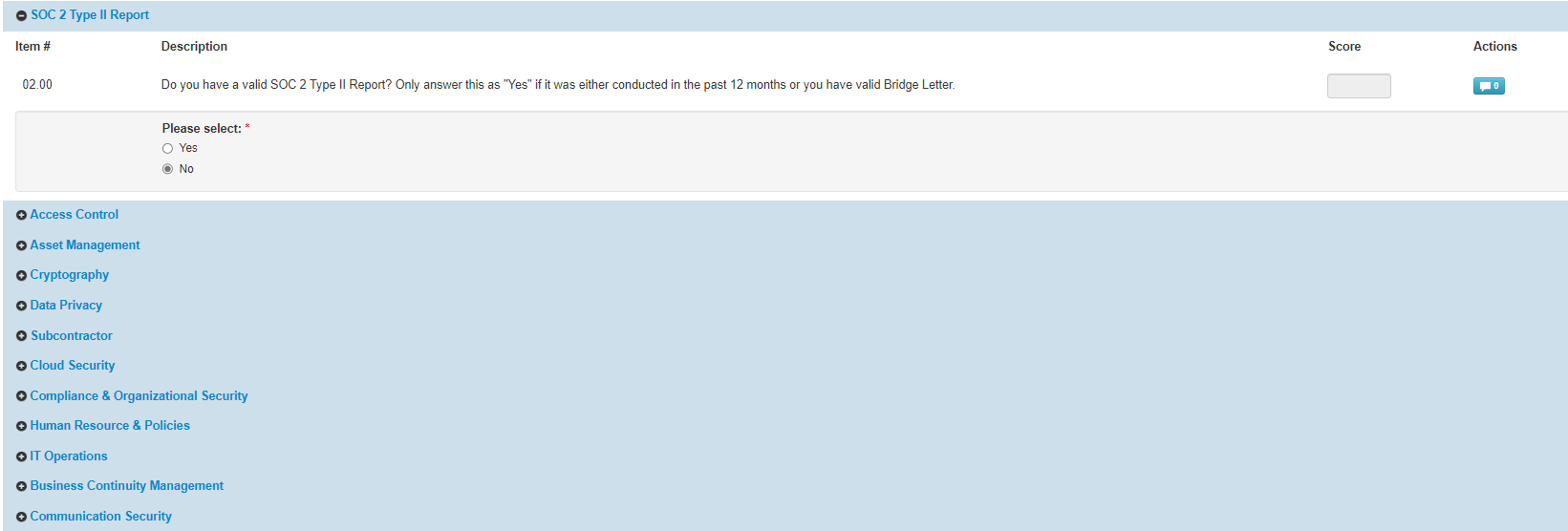


**6**

**7**

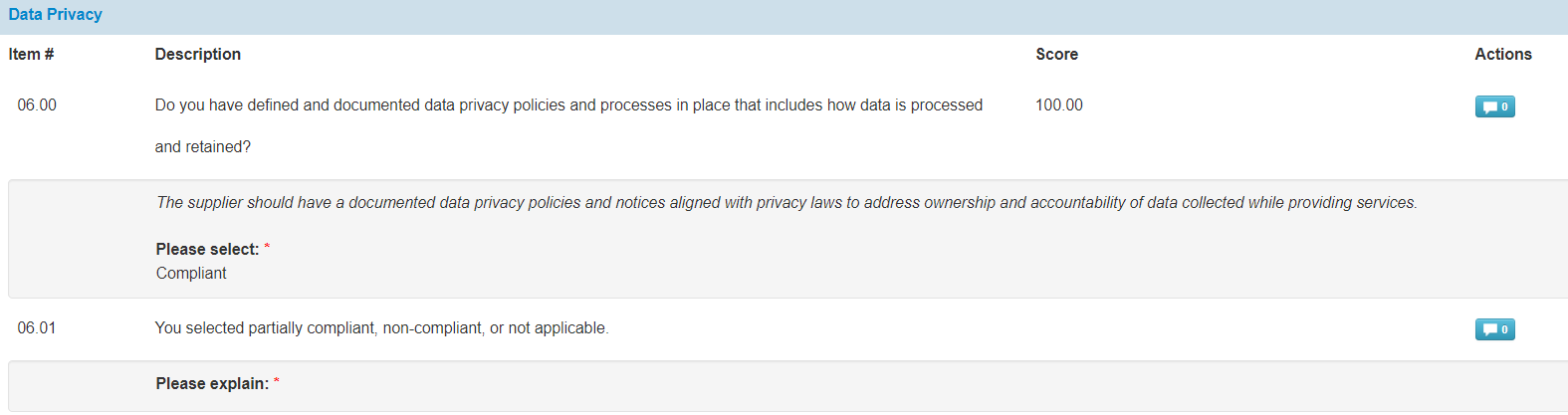
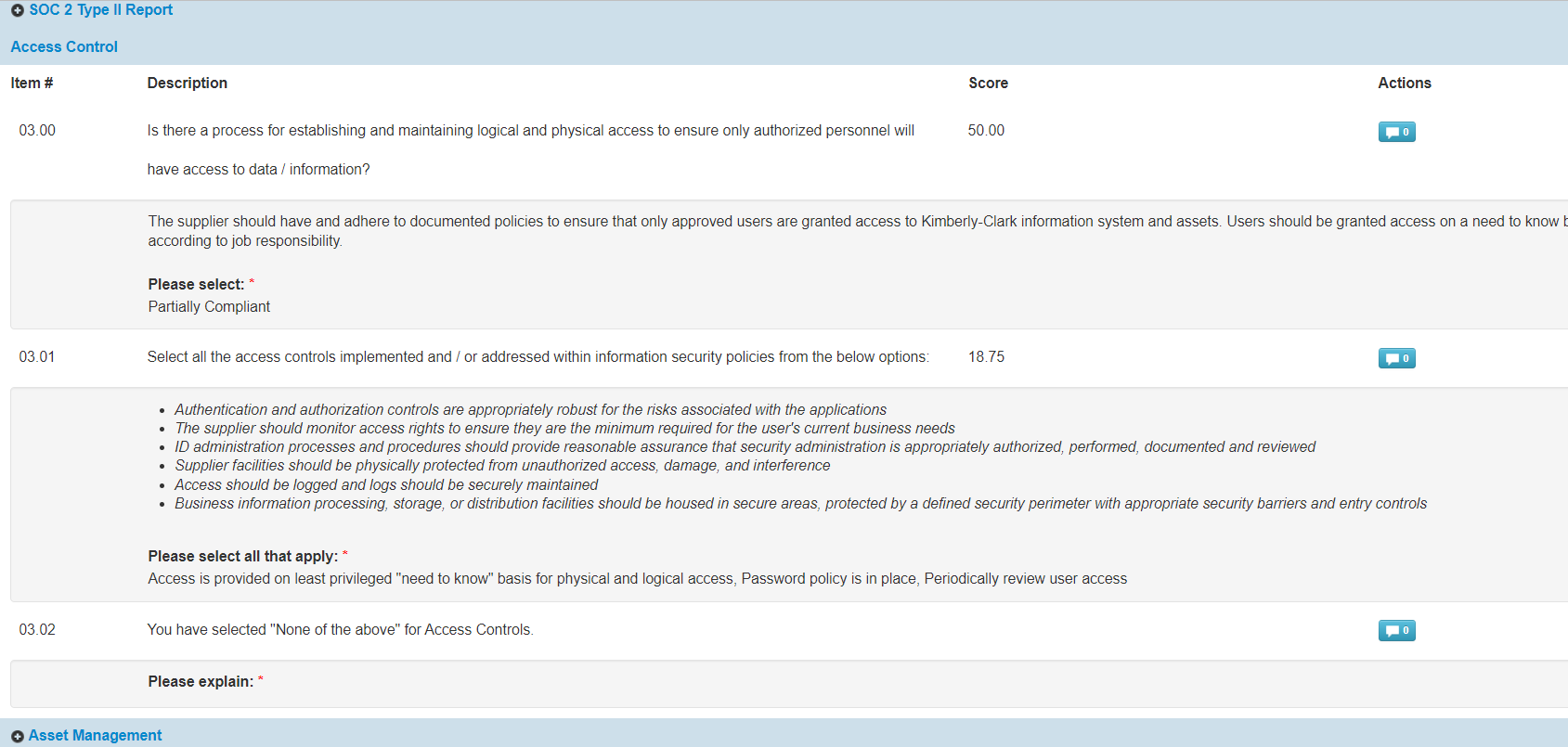
**3a**

Questions are organized by section title. Be sure to expand each section to review responses. A section may contain either one (1) or a grouping of several questions.



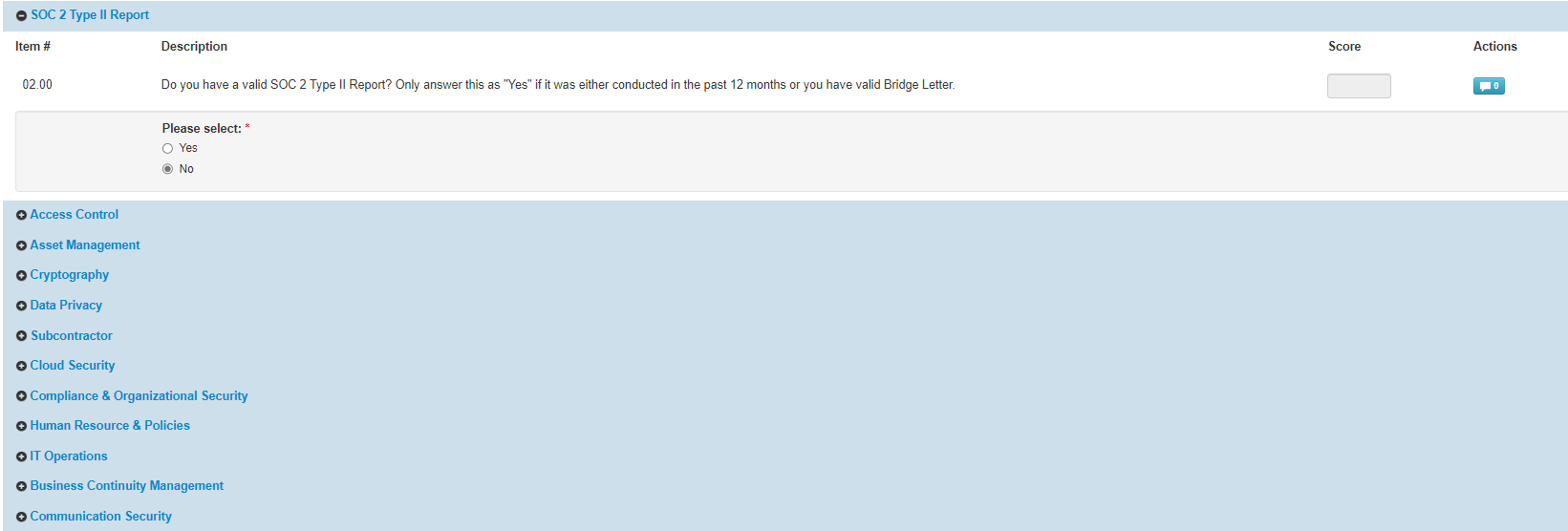
1. Click the **(+)** icon to expand the question sections’ details.

**7a**



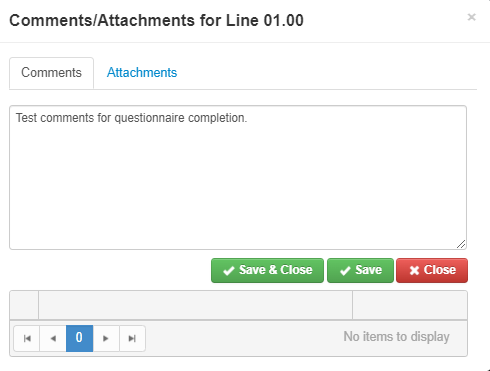
For those question sections that do not feature an upload button, comments and documentation can still be provided by clicking the **Actions** button.

1. Click the **Actions** button to add any comments to the questionnaire for Kimberly-Clark to receive.



**8**

1. Enter a comment in the **Comments** field to add additional information regarding attached information, ask questions, or to provide more detail about responses to action item(s) indicated in the plan.
2. Click the **Attachments** tab to add supporting attachments (if applicable).
3. Click the **Save & Close** button when complete.



**a**

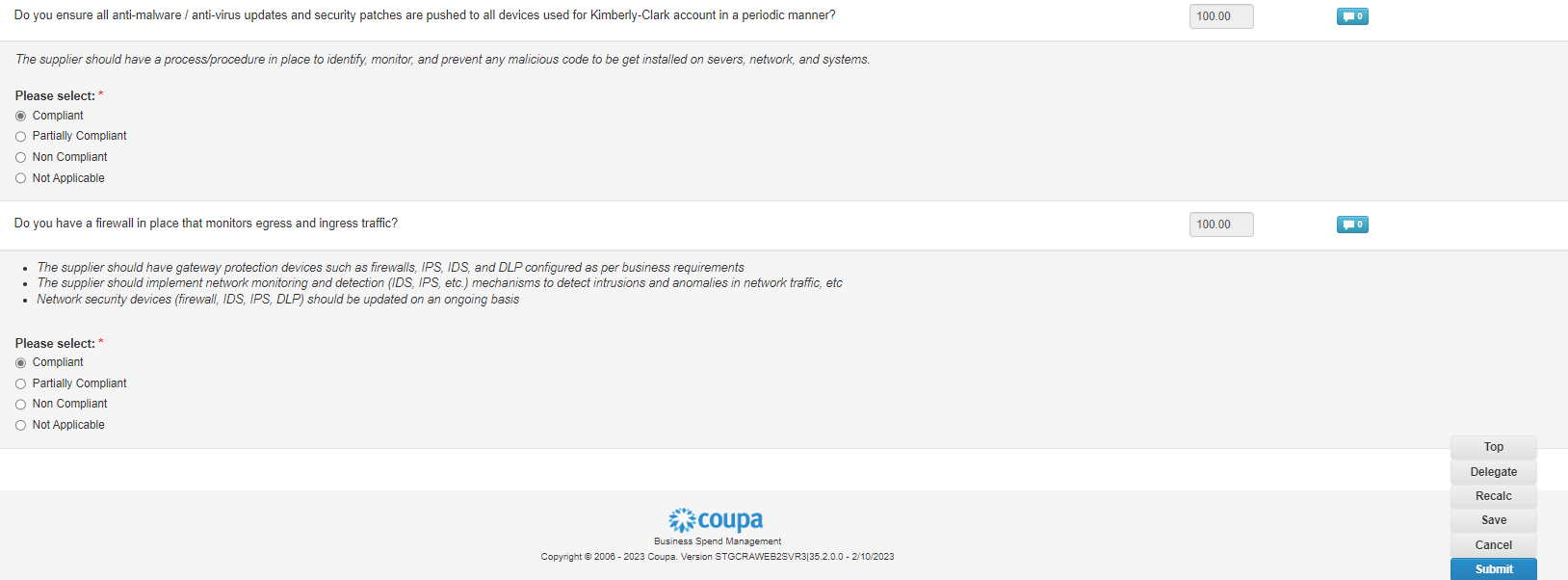
**9**

**b**

## Delegating Response to a Periodic Recertification

If a Periodic Recertification questionnaire needs to be reassigned, follow these steps.

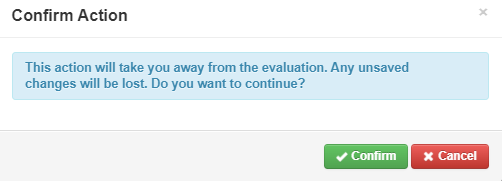
1. Click the **Delegate** button to assign the completion of the questionnaire to a designee.



**1**

The **Confirm Action** popup window appears.

1. Click the **Confirm** button.

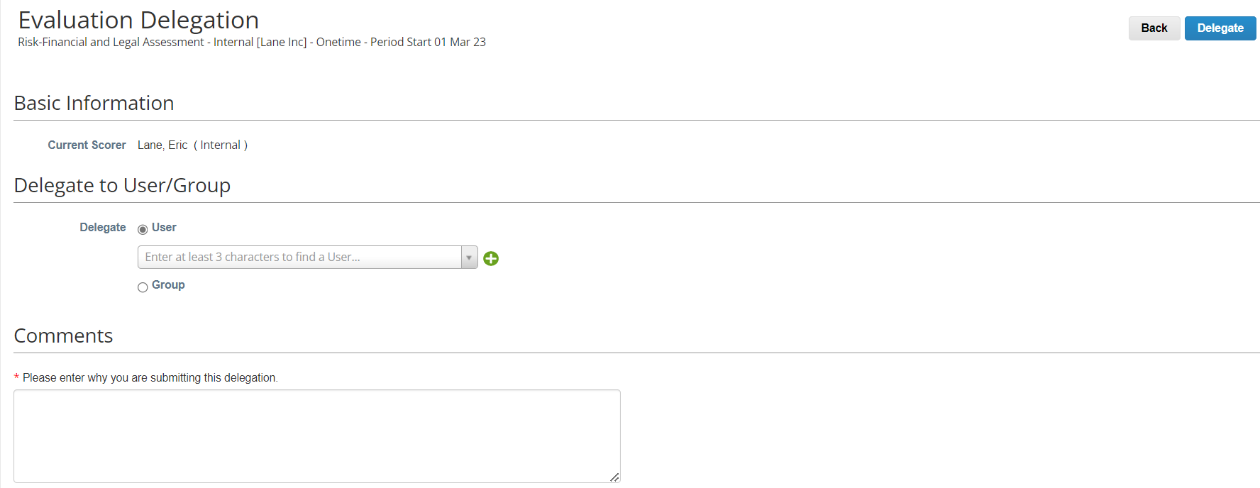


**2**

|  |  |
| --- | --- |
|  | **Note:** Confirming this action continues the process of reassigning your ability to submit responses to the questionnaire. |

1. In the **Delegate to User/Group** section select from either of the following radio button options:
   * **Delegate User** (assigns and delegates approval authority of this action to an individual)
2. Enter the **Name of the individual** in the field.
   1. If the individual’s name does not populate, click the green **(+)** icon to add the individual as user.

**3**

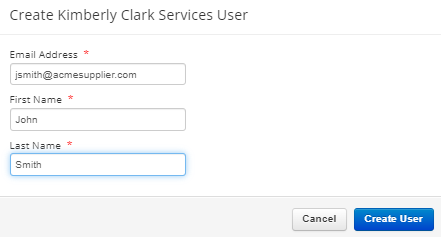


**4**

**a**

* 1. Complete the following fields to add a user:
     + **Email Address**
     + **First Name**
     + **Last Name**

1. Click the **Create User** button when complete.

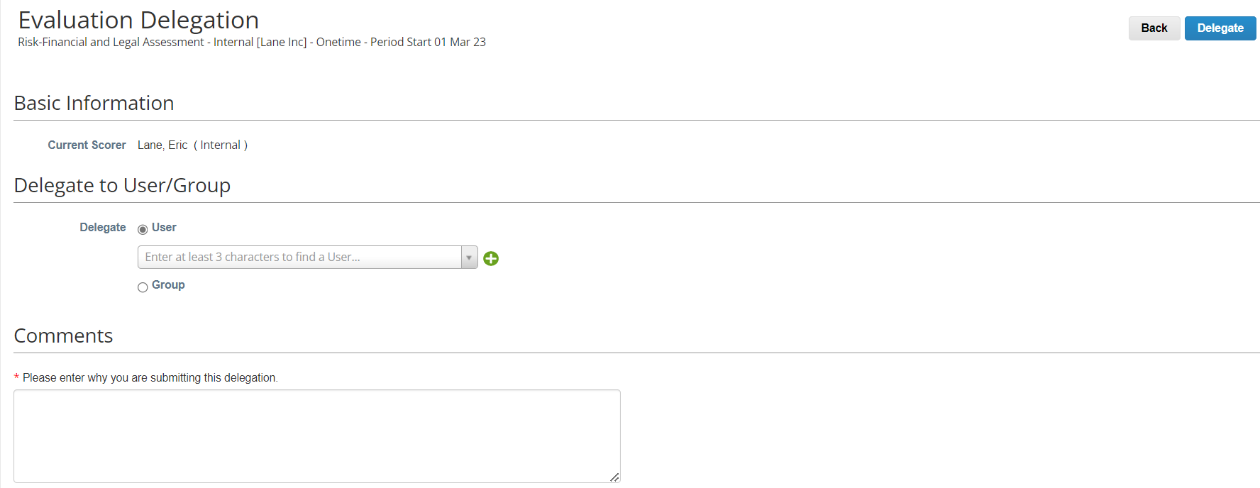


**b**

**c**

1. Enter an **Explanation** for submitting the delegation in the comments field (\*required).
2. Click the **Delegate** button when complete.

**6**



**5**

|  |  |
| --- | --- |
|  | **Note:** The delegated individual receives an email notification of their newly assigned action. |

## Submitting Response to a Periodic Recertification

If delegation is not needed, and after reviewing and/or providing updated responses and attachments (if applicable) to the questionnaire:

1. Click the **Save** button to save all submitted responses.
2. Click the **Submit** button to submit the responses.

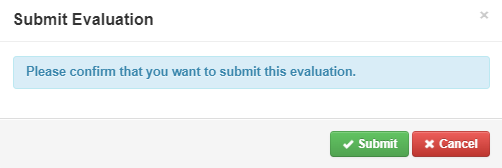


**1**

**2**

The **Submit Evaluation** popup window appears

1. Click the **Submit** button to validate and submit the responses to Kimberly-Clark.



**3**

|  |  |
| --- | --- |
|  | **Note:** Submitted questionnaires route via CRA for review and approval processes within Kimberly-Clark. The designated individual submitting the form will be notified via email of the evaluation outcome. |

**8**

**6**

## Additional Resources

* N/A