PUGET SOUND ENERGY

Contingent Staffing in Beeline

Supplier Job Aid

Version 1.0

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Program Overview & Getting Started

Who is Beeline?

- The leading vendor management system (VMS) provider.
- Specializes in contingent workforce management.
- Trusted by Fortune 500 companies, globally.
- Has a proven track record in utility industry implementations.

Beeline Benefits for PSE

- Enhances contactor selection process.
- Streamlined and centralized onboarding workflow minimizes manual mistakes and processing delays.
- Seamless and systematic off-boarding procedures decrease administrative workload and associated expenses.
- Live tracking and monitoring of contractor onboarding and off-boarding progress
- Links contractors directly to their corresponding contract agreements
- Integration with other business systems, improved data accuracy, and reduced manual data entry.
- Coordinated integration with comprehensive contractor off-boarding workflows.

What is Changing vs. What is NOT Changing?

<u>Changing</u>

- Contingent Contract Request submission will transition from Ariba to Beeline and Beeline will replace the BCAF (Begin Contractor Assignment Form) – CWAO Request and BCAF are now merged into one Request within Beeline.
- Functions formally managed by HR will now be administered through Beeline.
- Off-boarding procedures will now be automatic via Beeline.
- Rate negotiations eliminated: Standardized Rate Card Implementation

<u>NOT Changing</u>

- Timesheet/ expense entry process, including any timesheet/ expense modification.
- Financial authorization remains in Ariba.
- Existing Supplier and Hiring Manager relationships can be maintained.

Access to the Beeline Tool

The Beeline tool can be accessed with a username and password. Login information will be delivered in a Welcome Email from Beeline.

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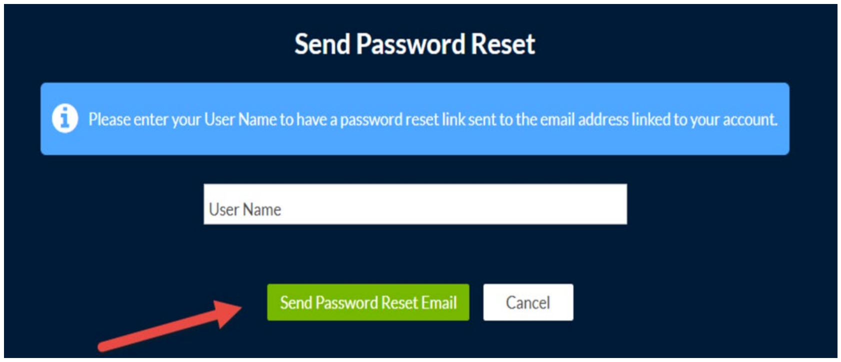
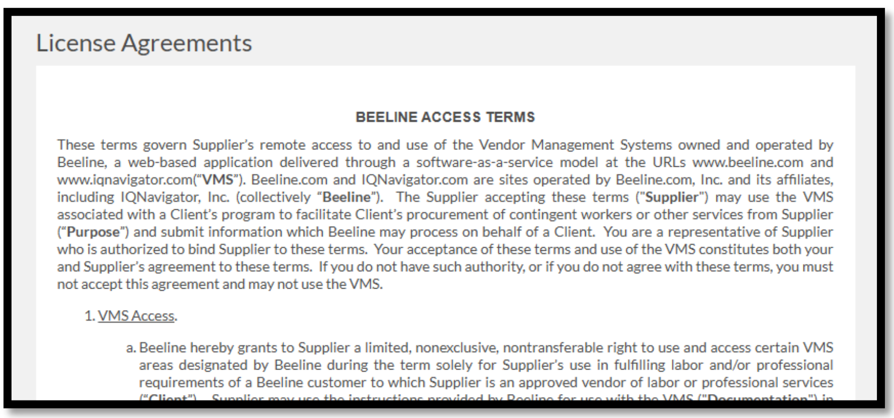
Beeline Notification: donotreply@BEELINENOTIFY.COM
Production Site: https://prod.beeline.com/PSE

You will need to follow the prompts to reset your password when first login in to Beeline. Once the password has been reset navigate back to Beeline to formally login using username and new password.



Upon logging into the tool, you will need to review and accept a Beeline license agreement.


License Agreements

BEELINE ACCESS TERMS

These terms govern Supplier's remote access to and use of the Vendor Management Systems owned and operated by Beeline, a web-based application delivered through a software-as-a-service model at the URLs www.beeline.com and www.iqnavigator.com("**VMS**"). Beeline.com and IQNavigator.com are sites operated by Beeline.com, Inc. and its affiliates, including IQNavigator, Inc. (collectively "**Beeline**"). The Supplier accepting these terms ("**Supplier**") may use the VMS associated with a Client's program to facilitate Client's procurement of contingent workers or other services from Supplier ("**Purpose**") and submit information which Beeline may process on behalf of a Client. You are a representative of Supplier who is authorized to bind Supplier to these terms. Your acceptance of these terms and use of the VMS constitutes both your and Supplier's agreement to these terms. If you do not have such authority, or if you do not agree with these terms, you must not accept this agreement and may not use the VMS.

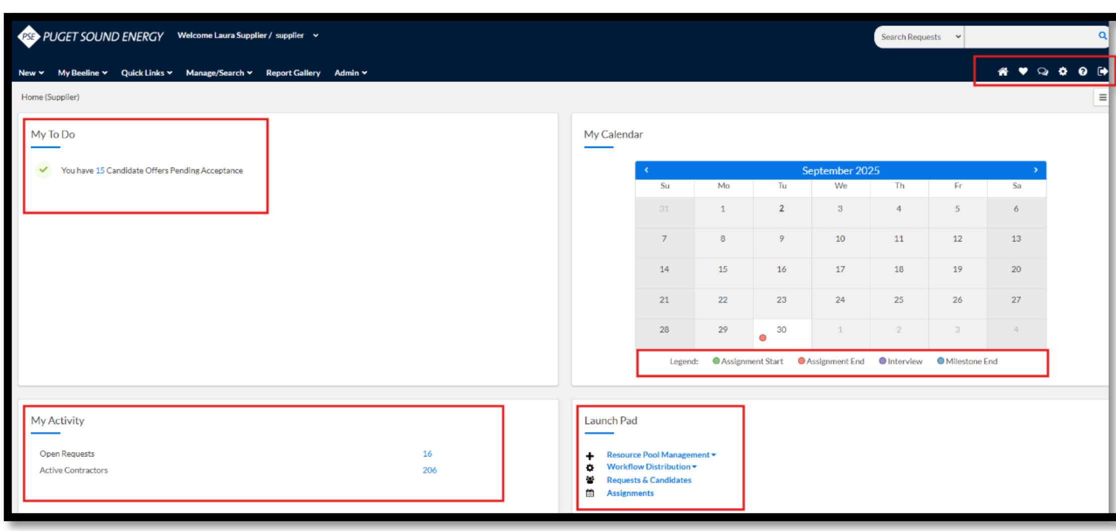
1. VMS Access.

a. Beeline hereby grants to Supplier a limited, nonexclusive, nontransferable right to use and access certain VMS areas designated by Beeline during the term solely for Supplier's use in fulfilling labor and/or professional requirements of a Beeline customer to which Supplier is an approved vendor of labor or professional services

Navigating your Home Screen

Broken into four quadrants (My To Do, My Calendar, My Activity and Quink Links).

My To Do: Provides you with alerts and links right on the home page so you can easily take action and manage items pending your review.



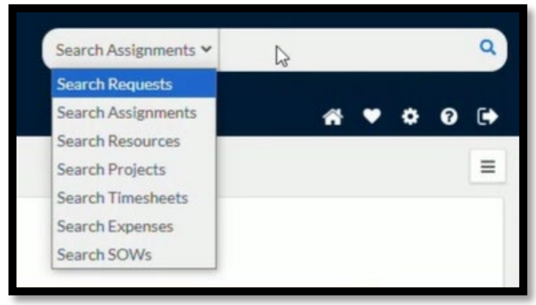
My Calendar: Provides a monthly view of important dates. To view additional information, you can click directly on a specific date.

My Activity: Provides you a place to get an overview of your Supplier organization's overview activities as well as a place to track candidate information.

Launch Pad: Here you have quick access to your Resource Pool Management, Workflow Distribution, Requests and Candidates and Assignments.

PSE Logo: You can find this in the top left-hand corner or your screen. The logo acts as a Home button to get you back to your main dashboard at any time.

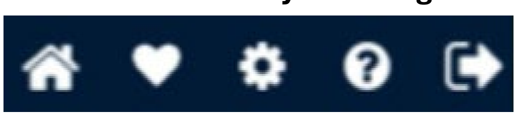
Simple Search: You can find this in the upper right-hand corner of your screen. You can quickly search for a variety of things.



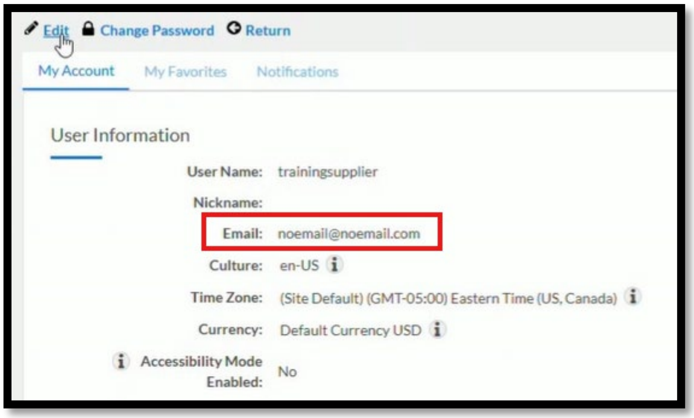
Header Bar:

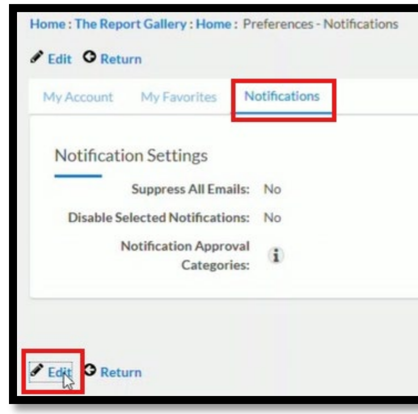
- **My Beeline**: Allows you to access any scheduled reports.
- **Quick Links:** Provides you with access to email support along with any other help links loaded into the tool by PSE.
- **Manage/Search**: This drop-down allows you to find all *Assignments, Candidates, Requests* and your *Resource Pool.*
- **Report Gallery**: Provides you with access to all reports that you can create or customize.
- **Admin**: Allows you to complete administrative actions

Additional Icons in your Navigation Bar:



- **Home Icon**: Will bring you back to your home page if you have navigated away.
- **Heart/Favorites Icon**: Will bring you to all favorites you have saved in the report gallery.
- **Gear Icon**: This is your *preferences* and by clicking it, you can view and edit your *Account, My Favorites* and edit *Notifications.* Be sure that the email address is accurate as this is where you will receive all notifications.





- **Help Icon**: Provides additional resources for help within the tool including Beeline help, Contact Us link.
- **Sign-out Icon**: Signs you out of the application.

Accessibility Mode

In the bottom right-hand corner of your screen, you will see the below icon which will allow you to make edits to your Accessibility Mode. Once you click on the icon, you can make edits to your widgets throughout your Beeline experience.

Contingent Staffing Overview

What is Contingent Staffing?

Contingent Workers employed by a temporary staffing agency that PSE has contracted with to augment PSE staff job functions or roles from time to time. Temporary workers are not employees of PSE. These workers are evaluated and selected for their individual experience and capabilities. Their day-to-day work is directed by PSE and they perform activities in roles that are typically performed by PSE employees.

Examples: IT Project Managers, Engineering Specialists, Administrative Specialists

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Your Role as the Supplier

Supplier Role & Responsibilities

Primary Responsibilities in Contingent Staffing

Review and submit candidate to request created by Hiring Manager contingent staffing

Maintain up to date Resource Pool

Validate completion of required background checks and candidate documentation

Manage ongoing assignment support included amendments, extensions and termination coordination

Maintain accurate candidate and assignment information throughout the lifecycle

Decision-Making Authority

Accept or reject candidate offers based on supplier capacity, candidate availability and business requirements

Validate and confirm completion of required background screenings before assignment commencement

Initiate and approve/reject specific assignment amendments

Process various termination scenarios including no-shows, cancellations and early terminations

Collaboration with Suppliers & Procurement

Work closely with Hiring Manager on candidate selection, assignment modification and contract timelines.

Partner with Supplier ESG for resource matching and escalation support

Coordinate with Procurement teams during approval workflows and compliance reviews

Maintain proactive communication regarding assignment status, changes and potential issues

Compliance Requirements

Respond to system notification and complete required tasks within established timeframes

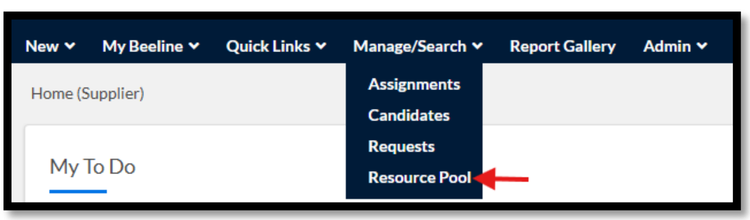
Ensure all candidate documentation is complete, accurate and meets PSE requirements

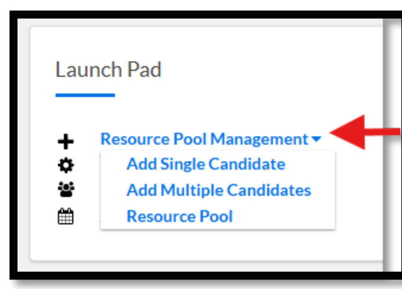
Adhere to PSE contractor management policies and established workflow procedures

Resource Pool Management

Follow the steps below to add new resources to the Beeline tool as a part of your Resource Pool. When a Request is open for your candidate, you will then easily be able to add a Resource from your Resource Pool.

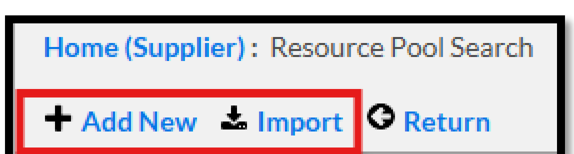
1. Navigate to Resource Pool section from the Navigation Bar at the top of your Home screen OR use the Launch Pad and Add from the Resource Pool Management.





2. Create new resource profile

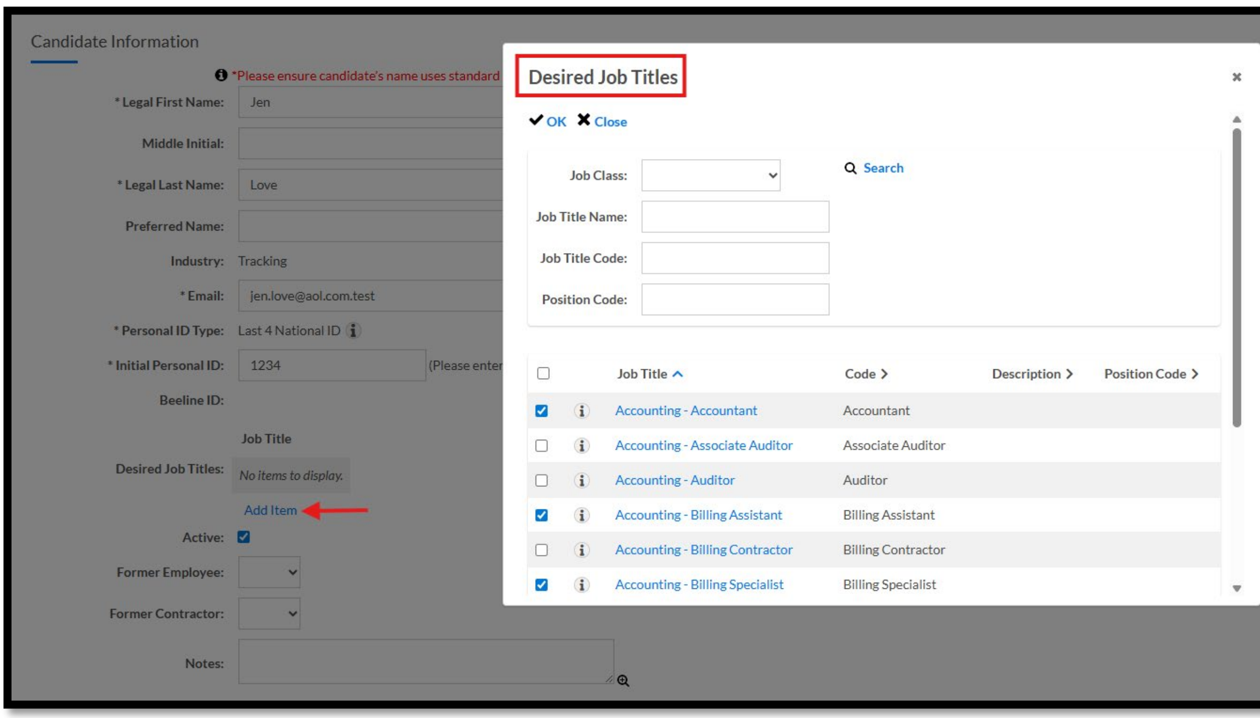
   - ***Add New*** for a single resource or ***Import*** to create a larger quantity of resources.



3. **Select Candidate Industry**: *Tracking, Contingent* or *Contingent-Preidentified*

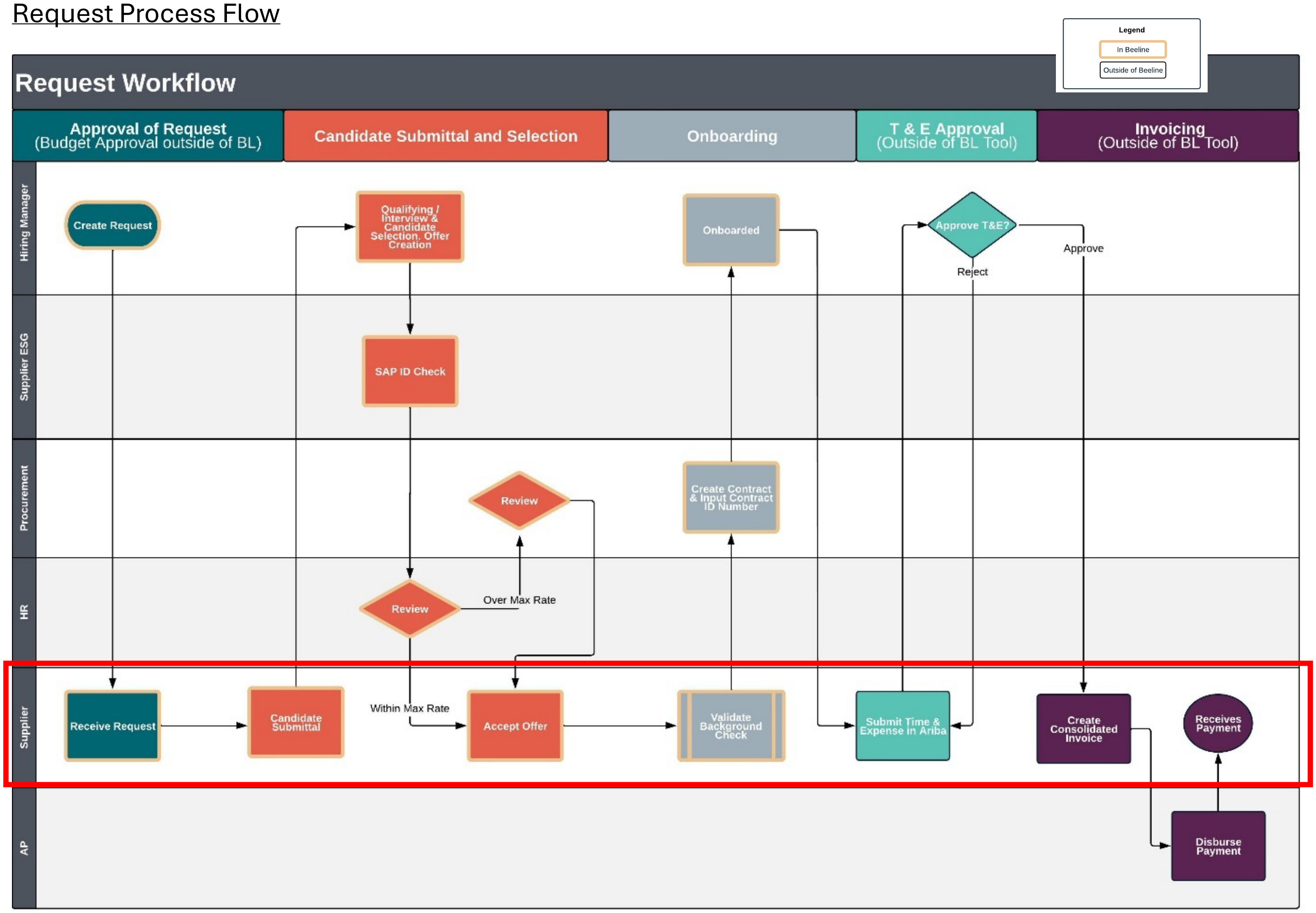
- For Contingent you should see the candidate industry “Contingent – Candidate Selection”, “Contingent – Preidentified”, and “Tracking” available. If these options are not visible, contact Supplier ESG.

4. **Required Fields**
    - Legal First Name (use standard capitalization and no special character or symbols)
    - Legal Last Name (use standard capitalization and no special character or symbols)
    - Preferred Name (not required but useful if candidate does not go by legal first name)
    - Email
    - Initial Personal ID (last 4 of Resource National ID, *example: SSN*)
    - Desired Job Title: not required but useful what adding resources to requests as it allows for a deeper filter functionality
    - Former Employee
    - Former Contractor

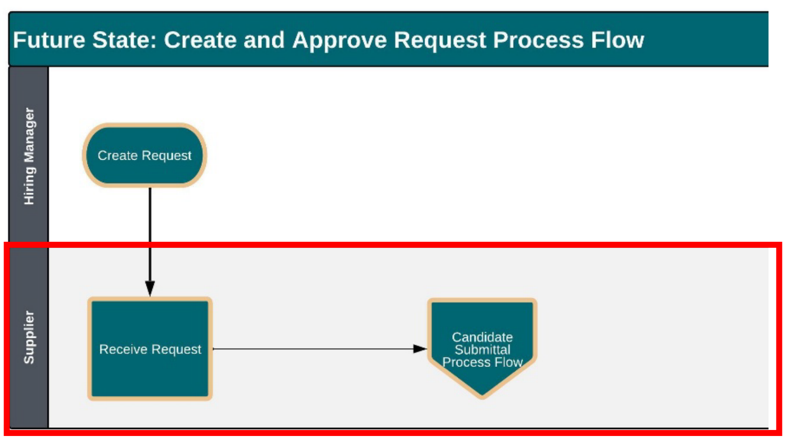


If you’ve loaded your Resource into your Resource Pool and you are looking to view the Resource or make edits to their profile, utilize the Search Options and filter by typing in any of the candidate’s information.

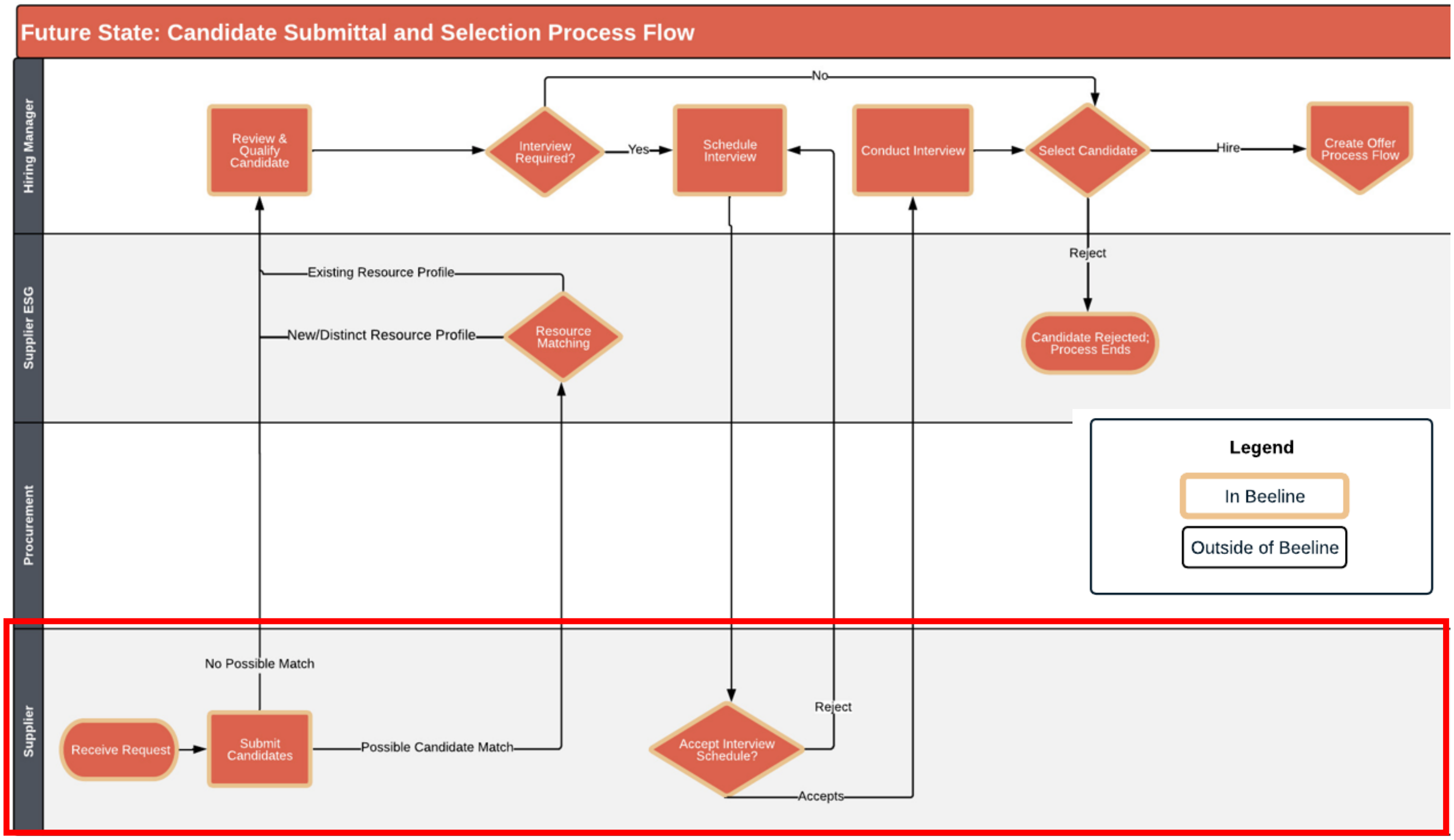
Request Process Flow



Receive Request Process Flow

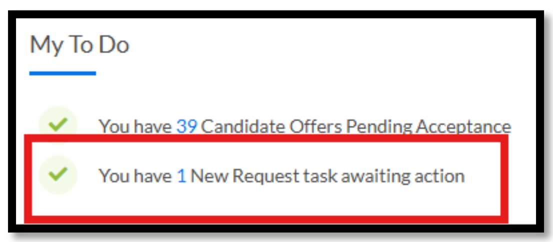


Candidate Submittal & Selection Process Flow



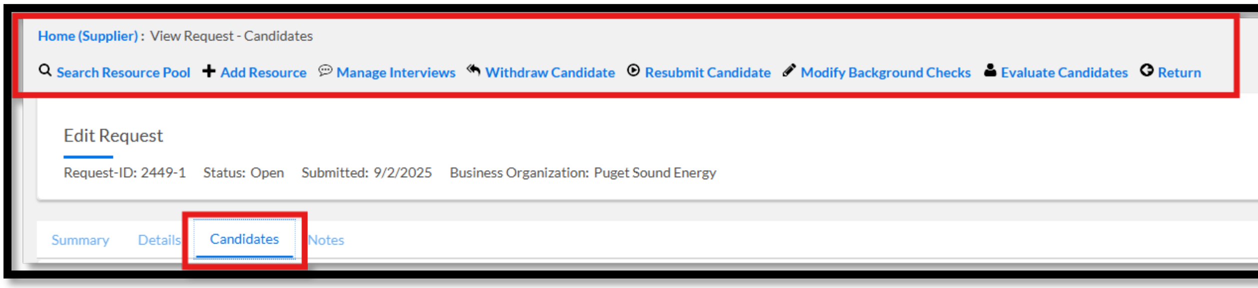
Candidate Submission

From your *Home* screen, you can view Requests pending your action from the *My To Do* quadrant.

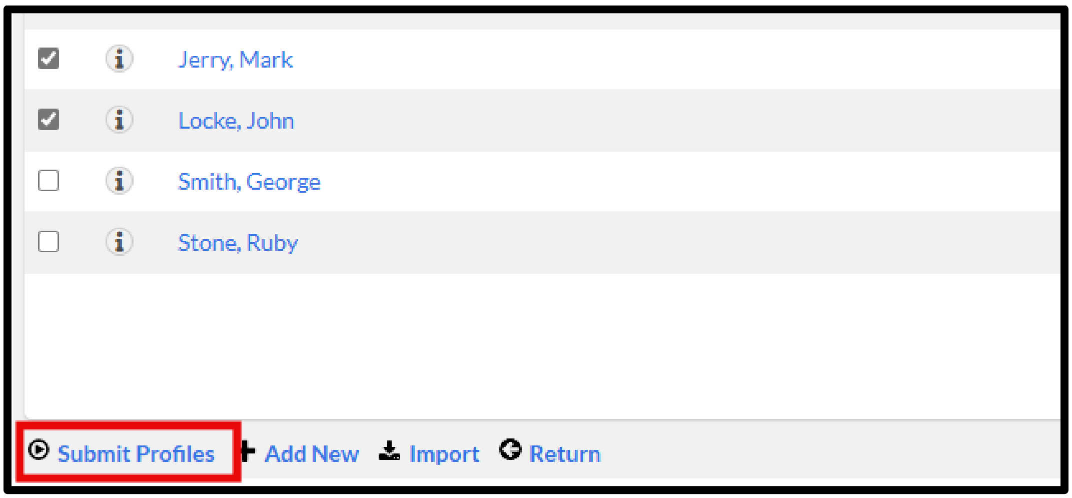


1. From the *New Request* tasks awaiting action, select *Action* and *View Details* next to the request.
    a. IF the Hiring Manager or SupplierESG has made an edit to the Request, it will NOT appear in the *My To Do* quadrant rather it has to be searched for in the *Launch Pad*.
2. Open the Candidate Submission Process by clicking on the *Candidates* tab.

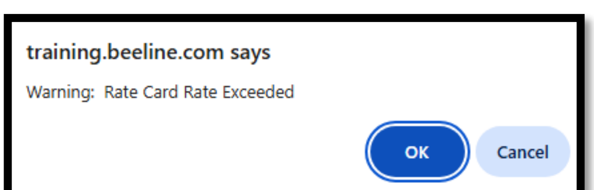
- Resource Pool Selection: Select candidates from the existing resource pool using *Search Resource Pool* or *Add Resource* functionality.

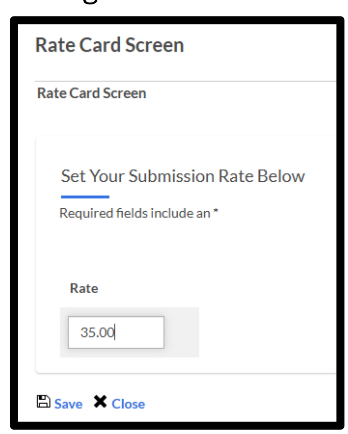


- Candidate Release: Select the check box next to the candidates you want to submit to the request. Release qualified candidate from resource pool by *Submit Profiles*.



- Submission Limit: Each job title has a defined number of candidates that can be submitted (the current default is three (3) candidates, subject to change).
- Required Information: Complete all mandatory fields including
  - Is Sub-Contracted: Indicate if candidate is sub-contracted and provide *Sub-Contractor Supplier Name* if applicable.
  - Former Employee/Contractor Status: Verify status for both fields.
  - *Rate Setting*: Use ***Click to Set Rates*** to enter candidate billing rates and save.
    - ❖ If you submit above the rate card, you will receive a warning, and the position will later route for additional approvals.



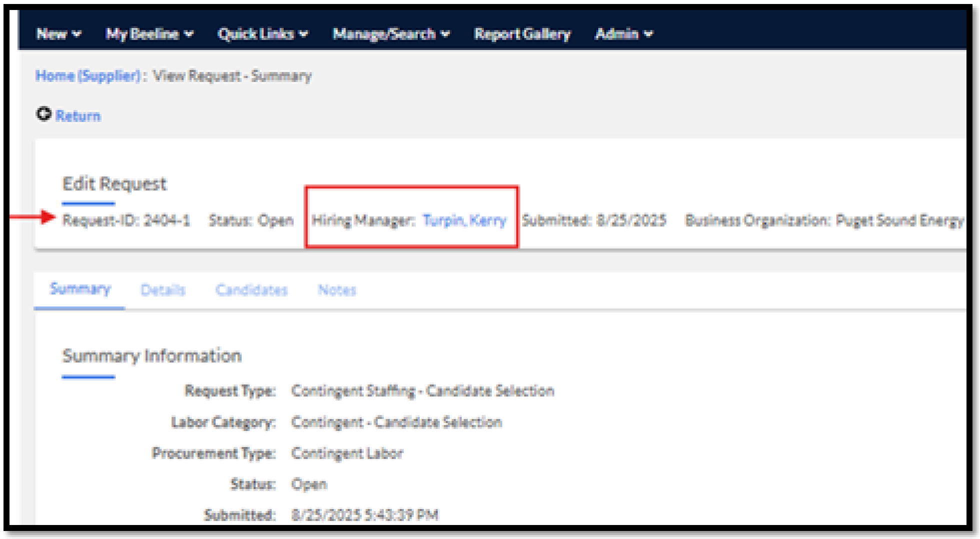


  - Skills & Resume: Load applicable skills and add resume by selecting, *Add Item*.
  - Final Submission: Click *Submit* to release candidate to Hiring Manager for review

Communication Protocol

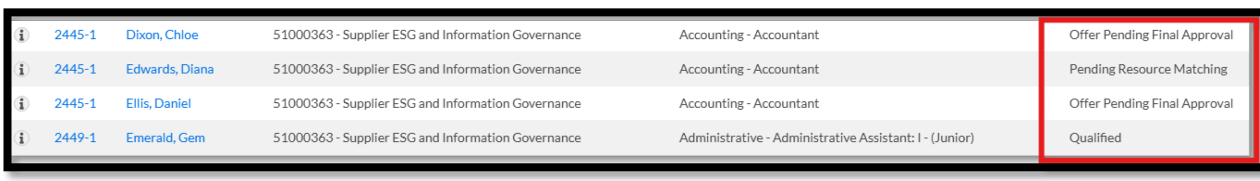
If any questions arise about the Request, you can email the Hiring Manager. The Hiring Manager's email alias is accessible via the Request.

Click on the Request from your Dashboard, *View Details* -> click on the Hiring Manager name which will then populate the email alias.



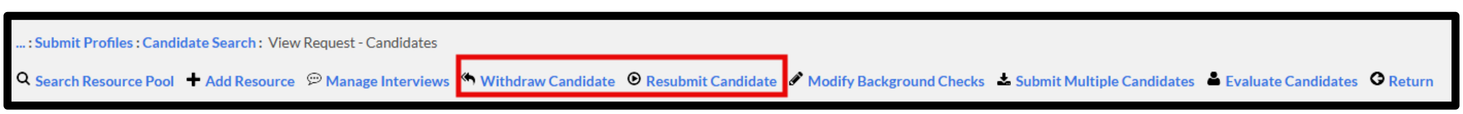
Post-Submission Management

- <u>Candidate Status Tracking:</u> Monitor candidate status changes from *Submitted* through qualification and selection phases.
    - From the Manage/Search drop down menu, choose Candidates and either filter by name or search the list at the bottom of the page. Here you will see varied statuses.



- <u>Resource Matching:</u> Coordinate with Supplier ESG team if system identifies potential duplicate profiles requiring resource matching.
    - Upon submission a status of *Resource Matching* will be displayed

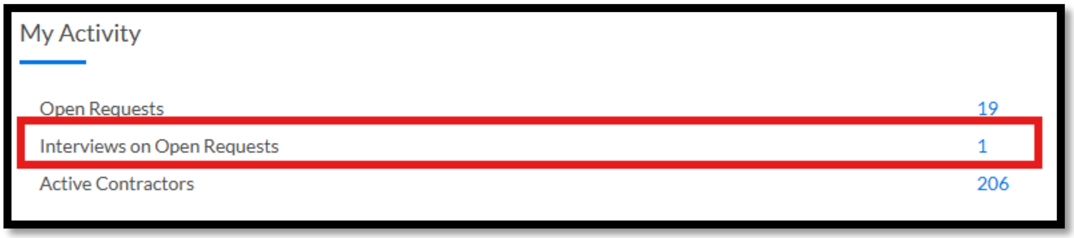
- <u>Candidate Modification:</u> Ability to withdraw and resubmit candidate with updates if needed before selection.



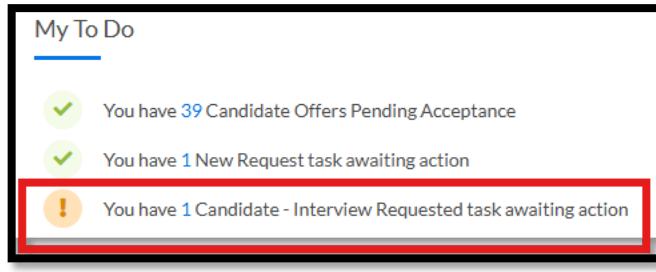
Candidate Interview Management

Interview Request Response

- <u>Notification Receipt</u>: *Candidate Interview* notification when the Hiring Manager requests interview will show in *My Activity*.

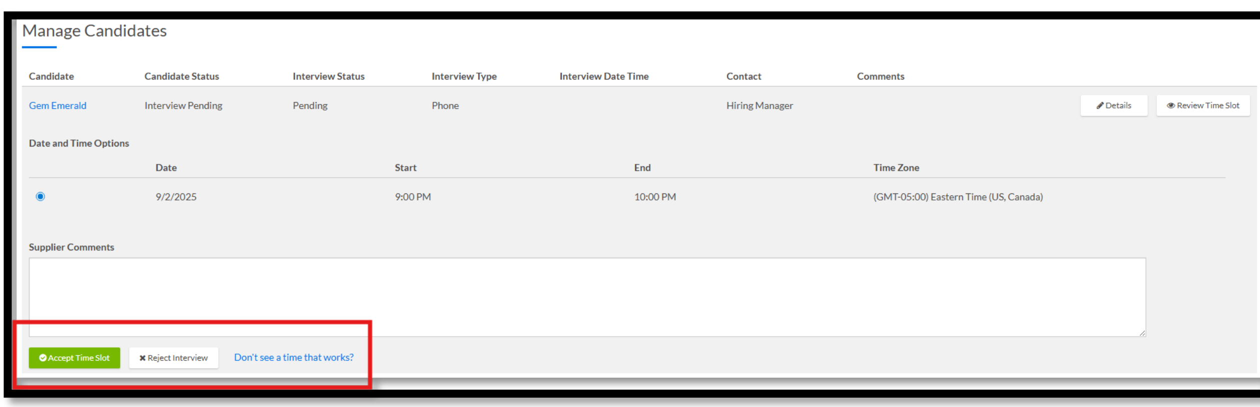


- Task Management: Navigate to *My To Do - Candidate Interview* request task awaiting action" to review pending interview requests.



- Interview Review: *Select Action*, *View Details – Details* to review interview specifics including type, attendees and proposed time slots.

- Response Options: Accept available time slot, reject interview request or propose alternative times if none work for the candidate.
    - Accept Interview: Click *Accept Time Slot* to confirm one of the proposed interview times which removes the task from your *To Do* list and sends confirmation notifications to the Hiring Managers who are part of the interview.
    - Reject Interview: Select *Reject Interview* if candidate is unavailable which will captures a decline reason in audit trail and cancels interview in the system calendar.
    - Propose New Times: Use Propose New Times functionality when original slots don't work which allows you to suggest alternative interview times for Hiring Manager approval.
    - Interview Types: Support various interview formats including Phone, On Site, Microsoft Teams, and Other as specified by Hiring Manager



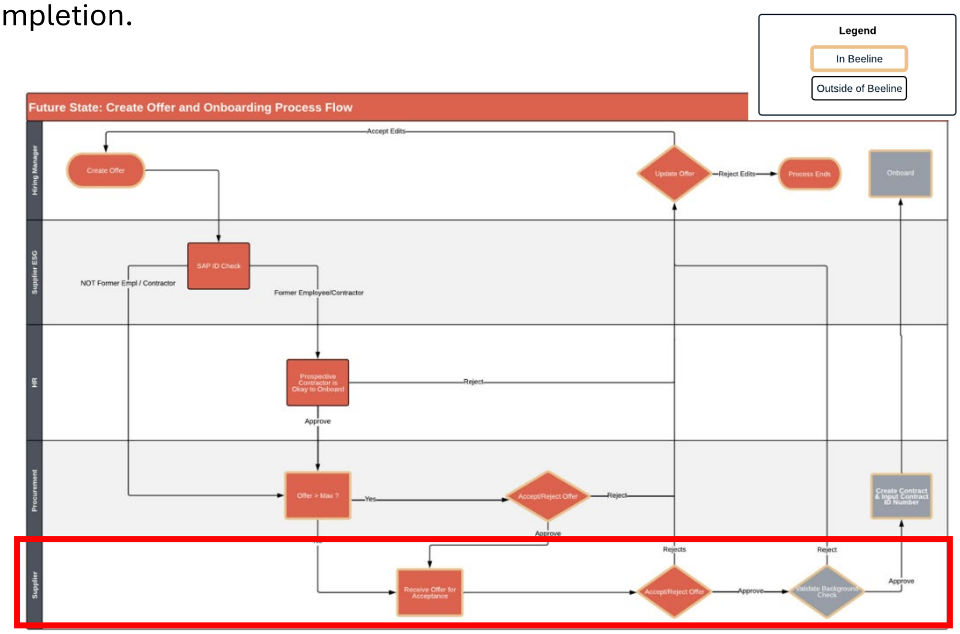
Post-Interview Management

- Interview Modifications: You will receive notifications if the Hiring Manager modifies the interview details after scheduling. This may require your approval depending on the changes made.
- Interview Reminders: You will receive system-generated *Candidate Interview Reminder* notifications at configured intervals before interview times.

- Interview Cancellation: You could cancel scheduled interviews, when necessary, which sends cancellation notifications to all participants and updates the system calendar.
- Status Tracking: You can monitor interview status changes from *Interview Pending* through *Interview Scheduled* to completion.

Offer & Onboarding Process

Offer & Onboarding Process Flow



Candidate Offer Receipt & Review

- Notification Receipt: You will receive a *Candidate Offer* notification when the Hiring Manager submits an offer to the candidate.
- Task Access: Navigate to *My To Do* to see any *Candidate Offers Pending Acceptance* and view pending offers requiring action.
- Offer Details Review: Select *Action*, *View Details* to review completed offer information including rates, start dates, assignment duration and terms. Please reference the ***Offer Rate*** vs the ***Submitted Rate*** as this is what the Hiring Manager has proposed.

Supplier Offer Acceptance

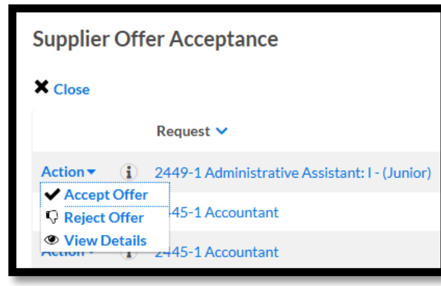
✖ Close

	Request	Candidate	Submitted Rate	Offer Rate	Start Date	End Date	Hiring Manager Work Location
Action ▾ ⓘ	2454-1 Administrative Assistant: IV - (Lead)	John Locke	$15.00	$12.00	9/23/2025	10/21/2025	Colstrip Montana

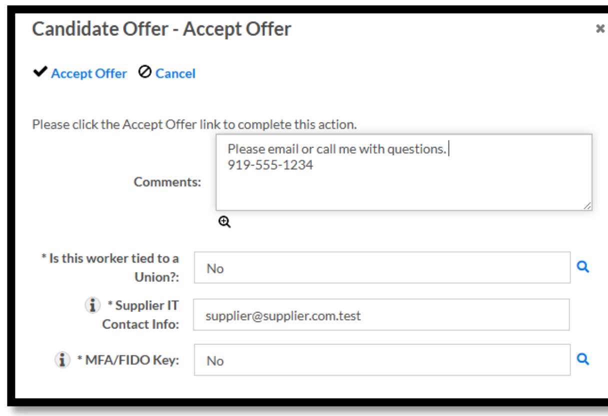
- Decision Timeline: Review and respond to offers within required timeframes to maintain workflow progression.

Candidate Offer Acceptance Process

If you have submitted your candidate over the bill rate, you will not see an offer right away as the candidate will route for additional approvals to Procurement Sourcing. You can however view where your candidate is from the *Open Requests*.



- Accept Offer Action: Select *Action → Accept Offer* to proceed with candidate placement.
- Required Information Completion:
  - Union Status: Indicate *Is this worker tied to a Union?* (Yes/No)
  - IT Contact Information: Provide Supplier IT Contact details for system access coordination.
  - MFA/FIDO Key: Supply Multi-Factor Authentication/FIDO key information for security setup.
  - Comments: Add any relevant notes or special instructions for onboarding

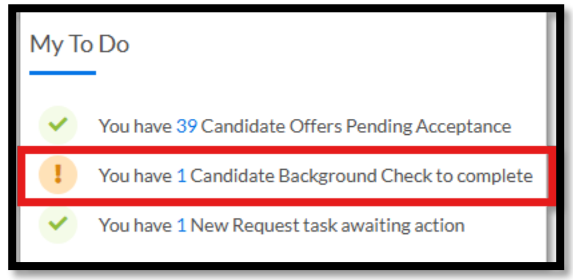


- Final Acceptance: Click *Accept Offer* to complete acceptance and move to background check stage.

Candidate Offer Rejection Process

- Reject Offer Option: Select *Reject* if unable to proceed with candidate placement.
- Rejection Justification: Provide detailed reasons for rejection to maintain audit trail and inform stakeholders.
- Notification Distribution: The system automatically sends rejection notifications to Hiring Manager, Supplier ESG, and other relevant parties.
- Candidate Status Update: Rejected offers update the candidate status and makes them available for other opportunities.

Background Check Coordination



- Post-Acceptance Responsibility: Upon offer acceptance, coordinate completion of required background checks.
- Background Validation Task: Receive *Candidate Offer* - Contingent - Background Checks - *Approve/Reject* task.
- Completion Verification: Validate that background check results meet PSE requirements before approving progression to onboarding.
- Issue Resolution: Address any background check concerns or failures with appropriate stakeholders.

Creating a Contingent Request (Steps Outside of Beeline)

Once Procurement Operations receives the Beeline Contingent Request for your contractor, the following steps will be completed outside of Beeline before the request is approved and onboarding can proceed:

- Ariba Contract Workspace (CW) Creation: Procurement will establish a contract workspace for your engagement
- Contract Execution: You will receive a Contingent Workforce Assignment Order (CWAO) via DocuSign for your signature
- Purchase Order Generation: An Ariba Blanket Purchase Order (BPO) will be created to enable electronic invoice submission for your services

These procurement steps must be completed before your contractor can begin the onboarding process.

Onboarding Process

Onboarding Notifications Only

- No Direct Onboarding Tasks: Suppliers do not have active onboarding responsibilities or approval tasks in the contingent staffing workflow.
- Onboarding Process Overview: After offer acceptance and background check completion, onboarding is managed by the Hiring Managers and internal PSE teams.
- Supplier Role: Monitor onboarding progress through system notifications rather than direct participation.

Onboarding Completion Notifications

- *Candidate Offer -* Approval Notification: You will receive a notification when the Hiring Manager successfully completes the onboarding process for your candidate.
- Assignment Creation Confirmation: A notification confirms that the Assignment has been created, and your candidate is officially onboarded.
- Status Update: Your candidate's status updates to *Onboarded* and the Assignment becomes active in the system.

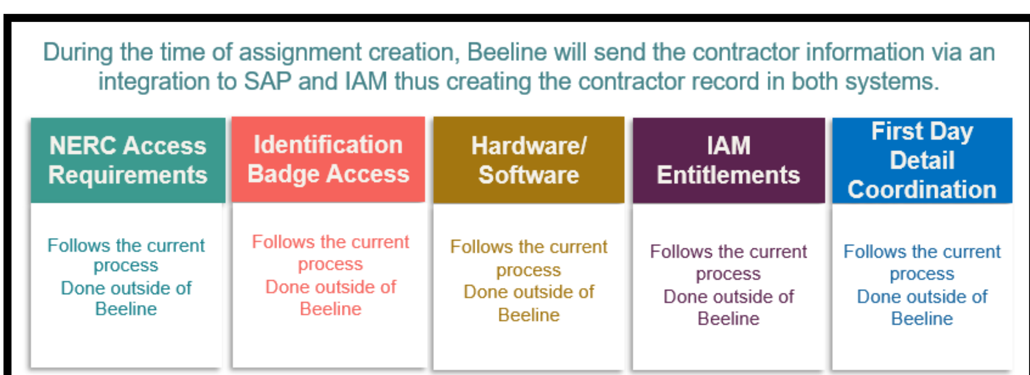
Request Filled Notifications

- *Request Filled -* Notification: You will receive a notification when the overall staffing request has been filled, regardless of whether your candidate was selected.
- Request Status Change: The system automatically marks request as *Filled* and removes it from active supplier queues.
- Multiple Supplier Impact: All suppliers who submitted candidates to the request receive this notification, not just with supplier whose candidate was chosen.

Post Onboarding Supplier Actions

- Assignment Monitoring: If your candidate was selected, begin monitoring the active Assignment through your dashboard.
- Amendment Readiness: Prepare to manage any future Assignment amendments or modifications as needed.
- Relationship Management: Maintain on-going communication with the Hiring Manager for Assignment support and future opportunities.
- Unsuccessful Candidates: For candidates not selected, they remain available in your resource pool for future opportunities. You do have the option to make edits to those resources within your Resource Pool.

Onboarding Process (Steps Outside of Beeline)



Assignment Management

Active Assignment Oversight

- Monitor Assignment status and key dates in Beeline.
- Track Assignment progress against original timelines and end dates.

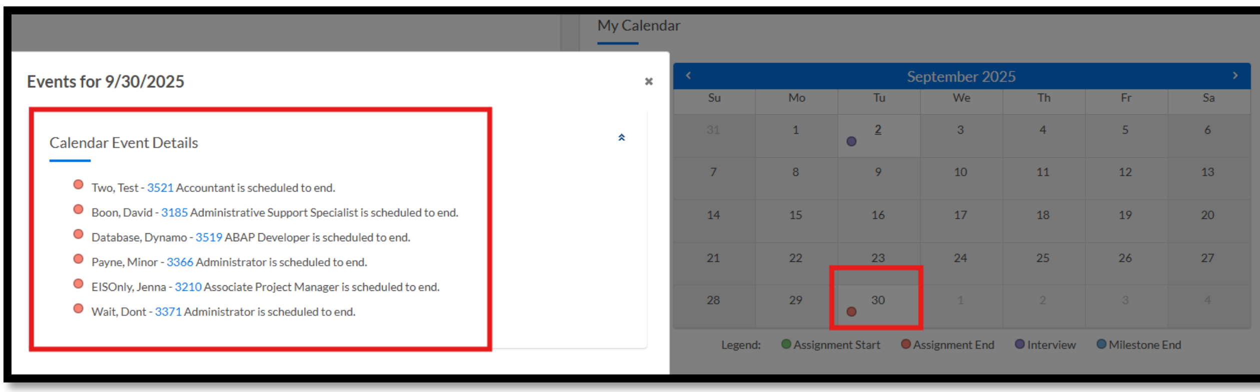
Ongoing Management Tasks

- Review and respond to system notifications.
- Process assignment modifications as business needs change.
- Maintain accurate assignment information and reporting relationships in the system.

End of Assignment Coordination

- Plan for Assignment renewals or terminations as end dates approach.
- Coordinate offboarding processes including badge return.
- Process final Assignment Amendments or early terminations as needed.

Utilize the calendar on your Home screen to help with ongoing maintenance and management.



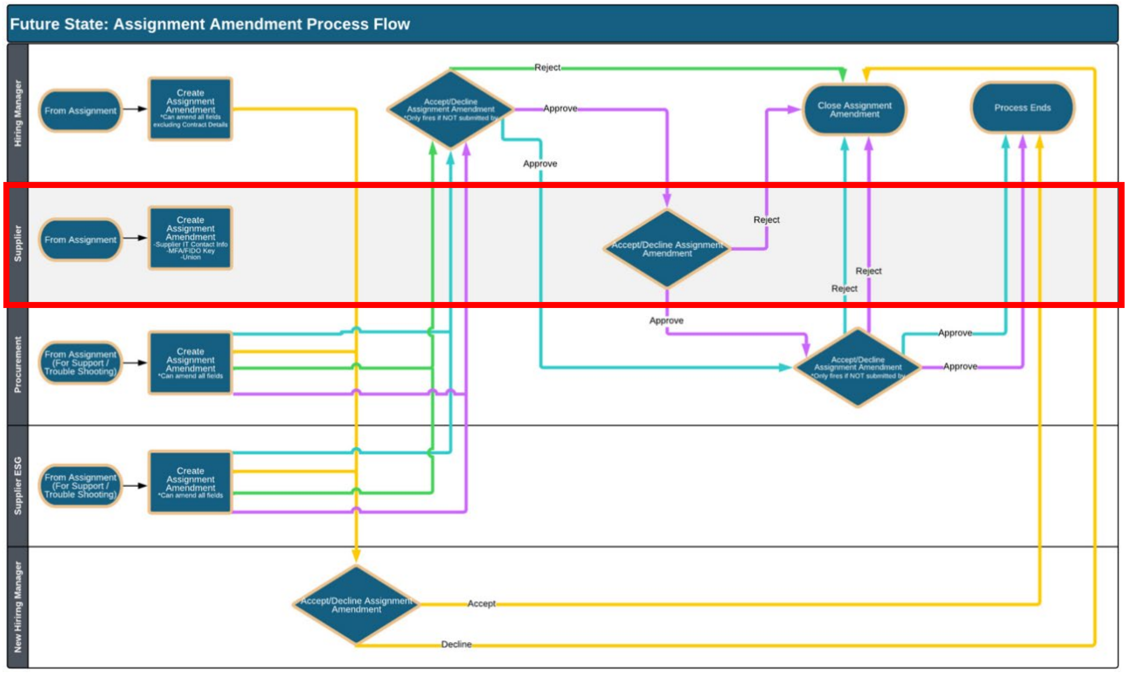
Amendments to your Assignment

Search for the Assignment in which you are looking to Amend/Extend.

Amendable Fields

- Supplier IT Contact Information
- MFA/FIDO Key
- Is this worker tied to a Union?

Mass Amendments: Only Supplier ESG can make mass amendments. Please reach out to SupplierESG@PSE.com for assistance.

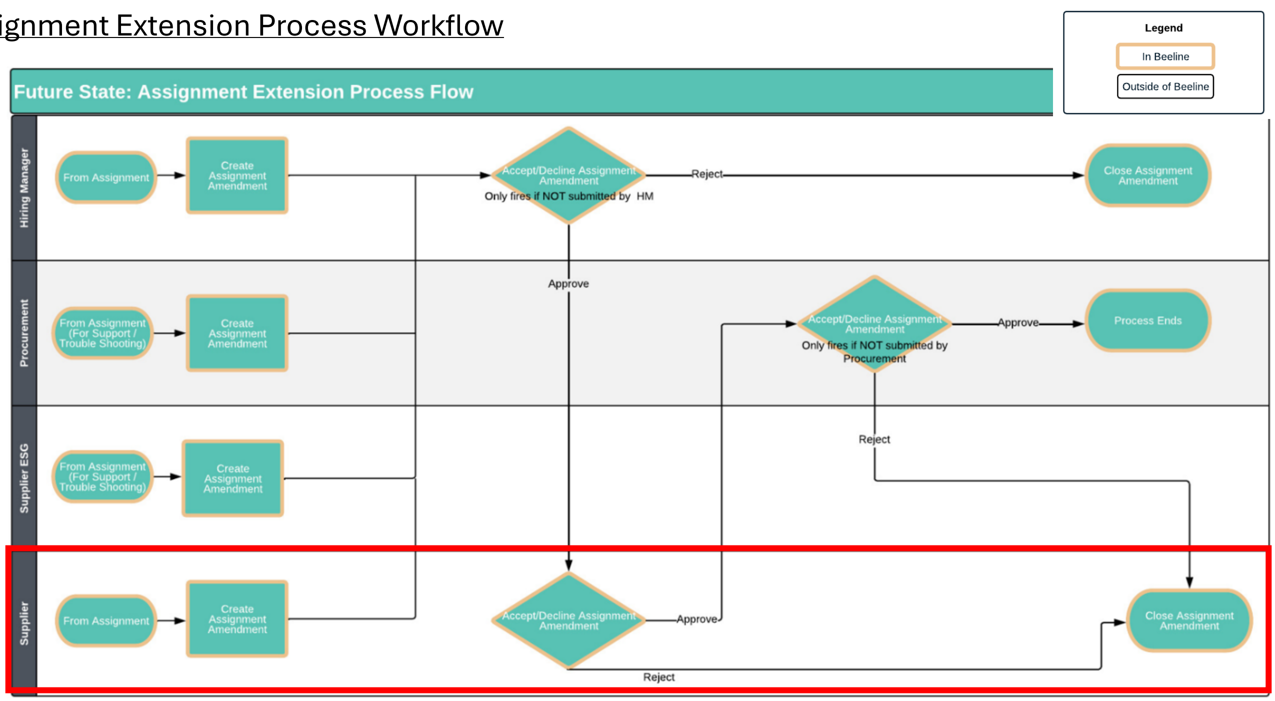


Extensions

When to submit an Extension? When the original work requires more time due to project scope changes, business continuity needs, replacement delay, all within the maximum two (2) year limit.

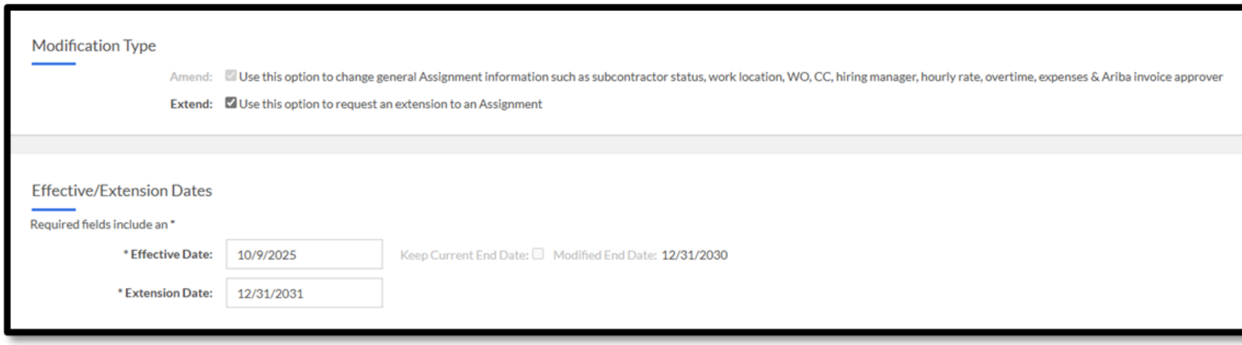
When submitting an Extension, an Amendment can also be initiated during the Extend event.

<u>Assignment Extension Process Workflow</u>

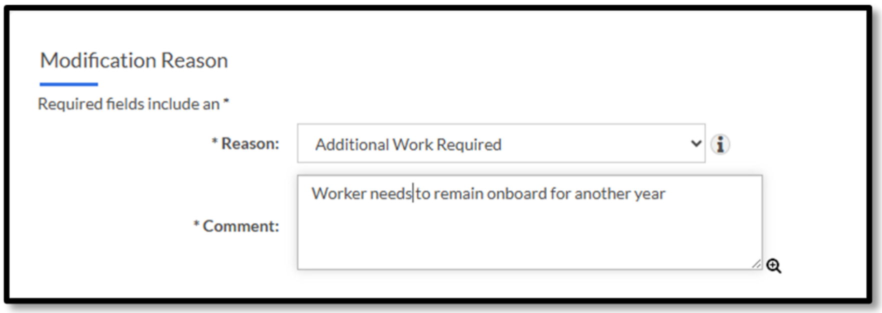


1. Choose the Active Assignment in which you would like to "Extend". Fill in the necessary fields. **NEVER** change the "Effective Date" as it always needs to be the date the Request is submitted. The "Extension Date" will be the new end date requested for the Assignment. Select ***Next.***

If the end date extends past the contractor's two (2) year time frame, the Extension will be denied.



2. Select a *Modification Reason* and click ***Next***.



Be mindful of the multi-approvals that will take place depending on the given Amendment

3. Click *Next* and the following screen will show the *Approver Selection* to provide visibility to the Hiring Manager specific to the next steps.
4. Upon submitting your Amendment, it will route to the Hiring Manager and then to Procurement Ops to review and approve.

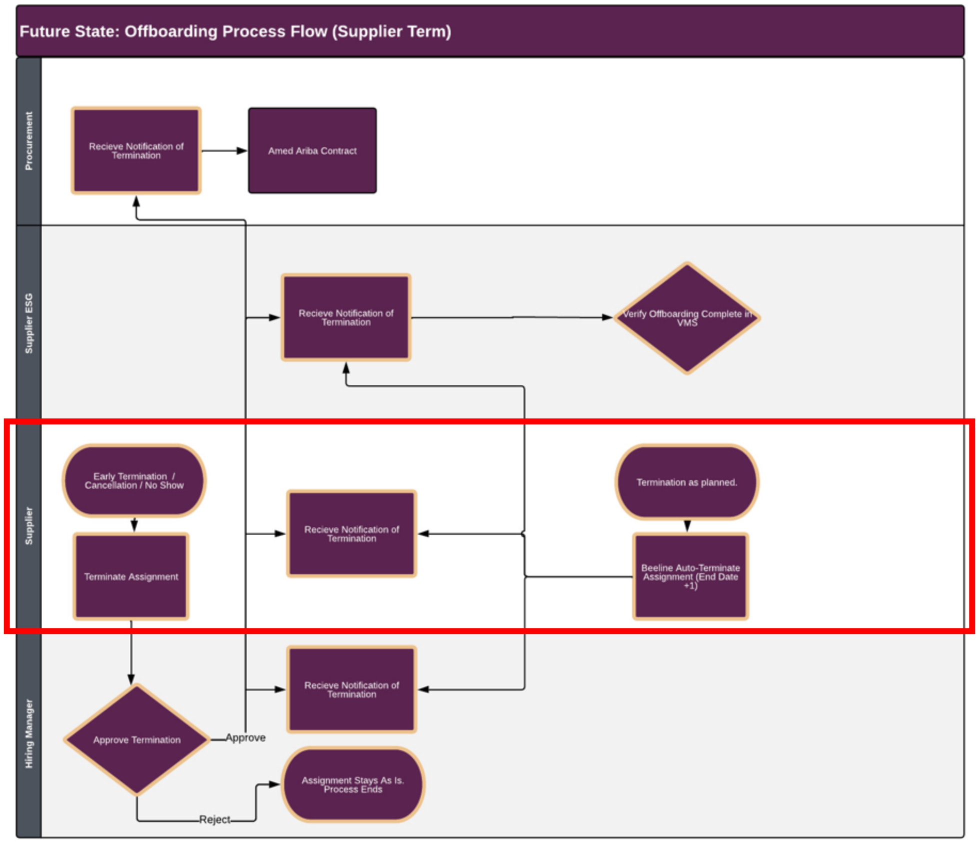
Assignment Terminations

Your contractor will naturally expire in Beeline based on the end date on their Assignment. If no action is taken to extend the Assignment, the contractor record will be deactivated on that Assignment end date.

Termination Procedures

- **No Show**: If the contractor did not show up for their first day.
- **Cancellation**: If the project has been cancelled, thus the contractor would be terminated.
- **Early Termination**: Several reasons exist (main examples; project ended early, contractor was converted to a PSE employee, contractor took a different position)

Beeline will trigger an off-boarding notification alerting you of the termination. In addition, please assist the Hiring Manager in a badge return if A1 or B1 profiles are selected.

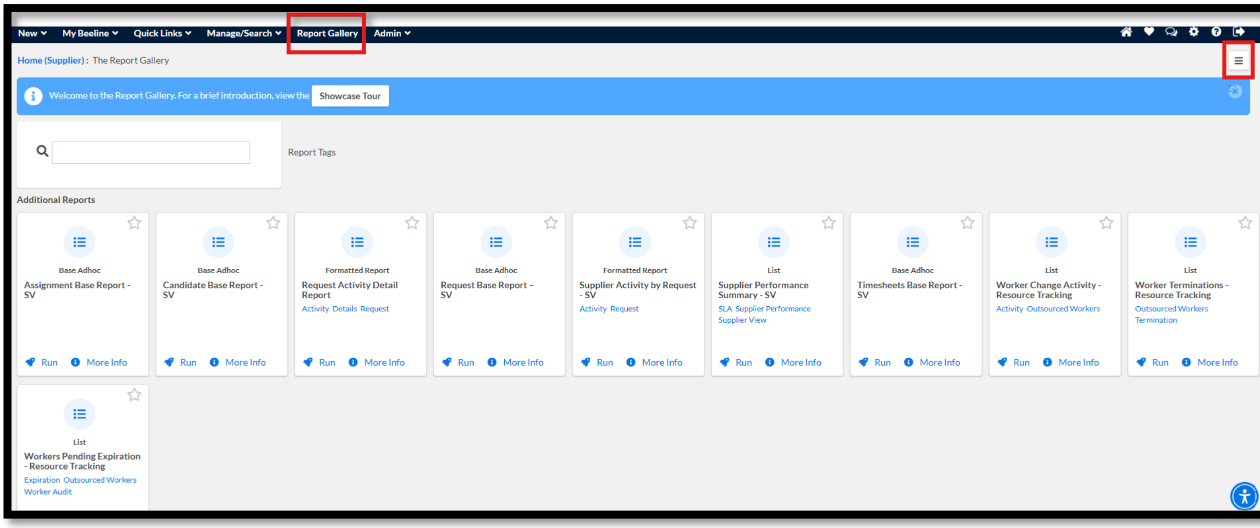


Notifications & Tasks

- Email notifications are automatically sent to Suppliers in two situations:
  - When they have a pending action item
  - When they need to be notified of an activity on requests or assignments under their ownership
- Email notification will provide links to the task that is needed the Supplier review
- Tasks can also be found on the *Dashboard* or the *My To Do* quadrant.

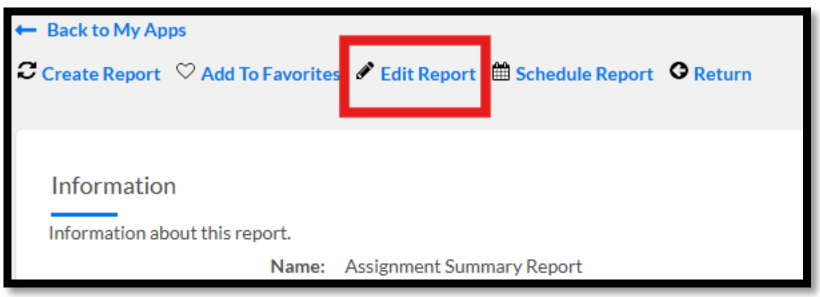
Reporting & Tools

You can access Reports from the Report Gallery, on your Home screen. Simply click on the report name to open it up to view, edit, run, send or schedule. You can also click the three dots next to the report name to add the report to your Favorites.

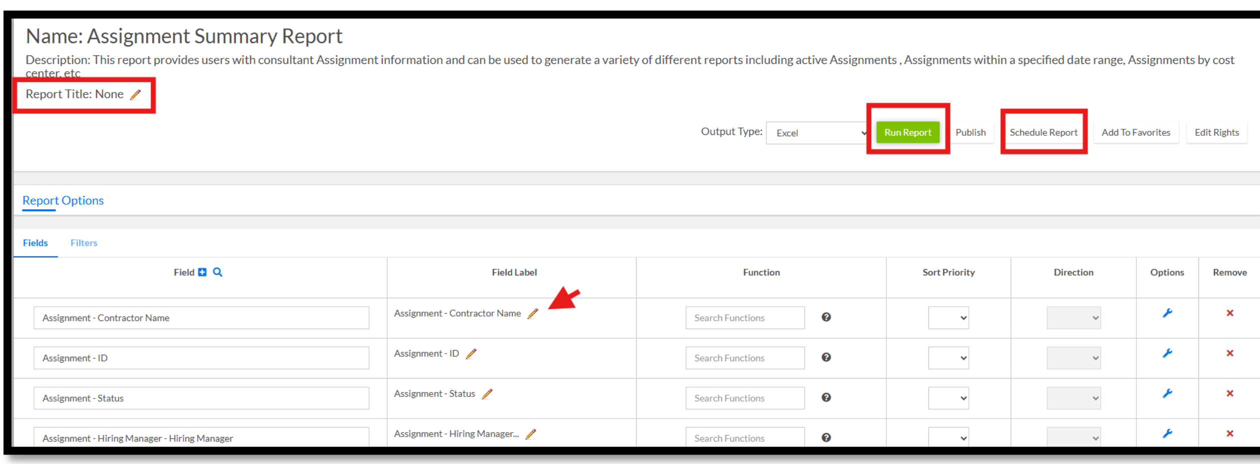


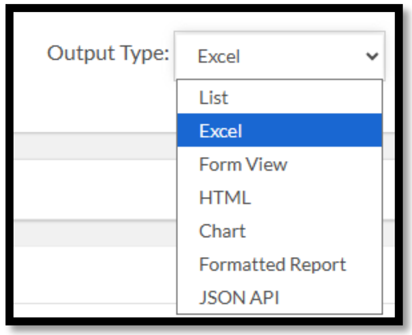
Viewing and Running your Report

1. Use the search functionality to find the desired report you are looking for. After clicking on the report, you will want to choose *Edit Report* at the top of your screen.



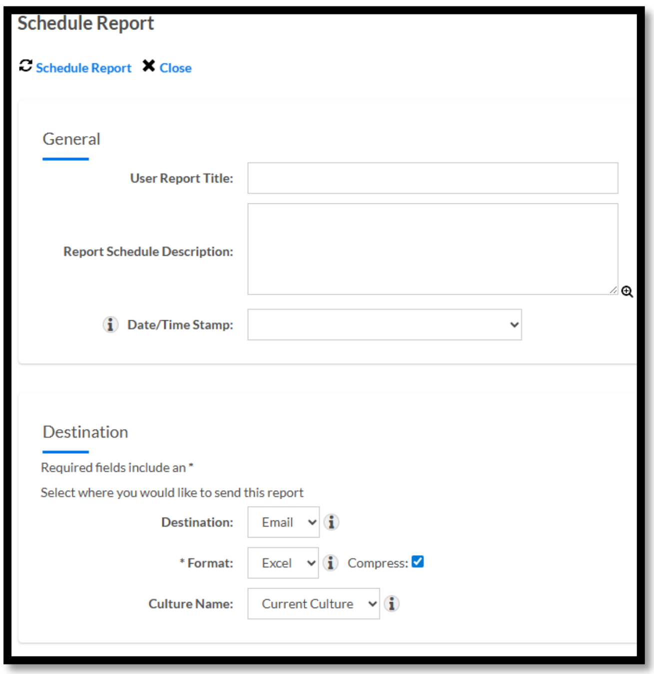
2. You can run the report as is or make edits via pencil icons.

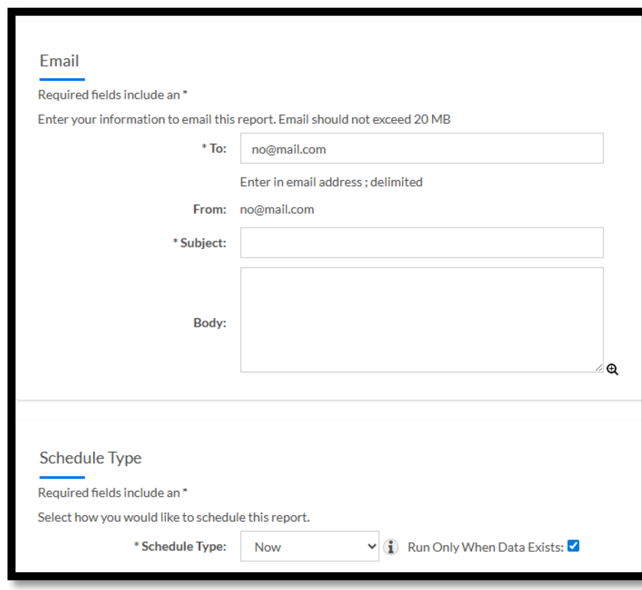




Favorites: When adding a report to your Favorites, you will have the option to edit it, remove parameters, rename it and even schedule it.

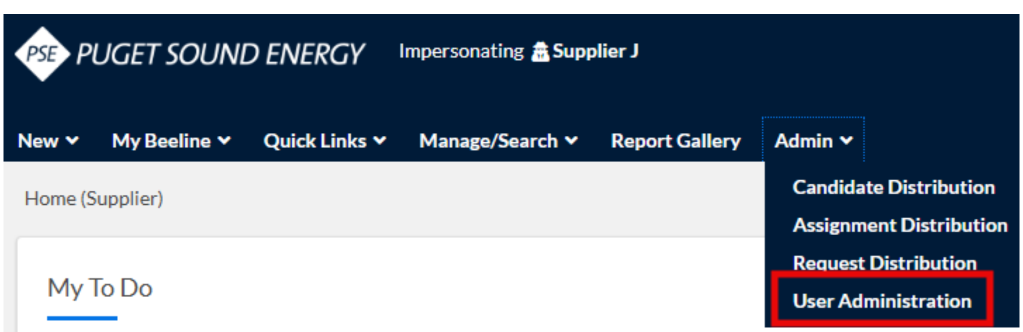
Schedule a Report: After choosing the report that you want to schedule, make edits as needed and fil in the required information to schedule it.



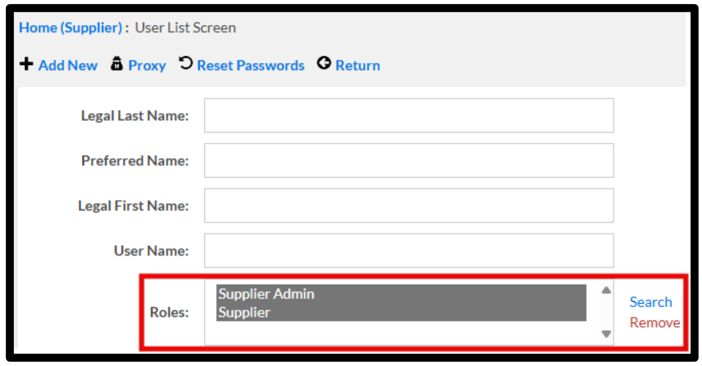


Supplier User Maintenance

To add or maintain your Supplier User profiles navigate to ***Admin*** and ***User Administration***.



1. Find the ***Roles*** filter box and click ***Search*** button next to it.

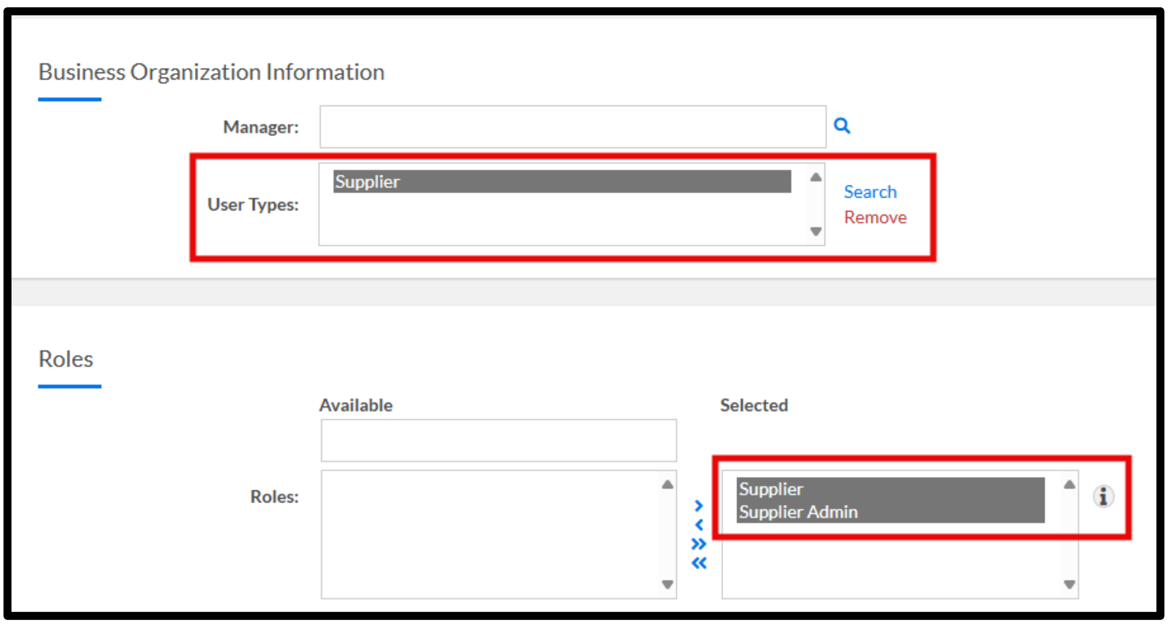


2. From the list that appears, select ***Supplier Admin*** and ***Supplier*** roles, then click ***OK.***

3. Click the main ***Search*** button located in the top right of the filter section. This will show all the current Supplier Users. To edit an existing user, click on their name, or select ***Add New*** to create a new user.

4. When adding a new Supplier user, ensure that:

   - ***User Types*** under Business Organization Information section is ***Supplier***
   - The Roles section includes either ***Supplier***, ***Supplier Admin*** or ***both.***



Resources

For all questions, please email Supplier ESG at SupplierESG@PSE.com.

Resource Links

- Supplier Contingent Staffing FAQ: PSE | Beeline
- Supplier Contingent Staffing Training Presentation (includes demos): PSE | Beeline
- Beeline Specific Supplier Training: Course | Supplier Training