

### OVERVIEW

Audience: External Suppliers

Puget Sound Energy (PSE) uses SAP Ariba to manage its sourcing and procurement activities and to collaborate with suppliers. The purpose of this Quick Reference Guide (QRG) is to demonstrate how to access and complete the Supplier Registration Questionnaire that PSE requires suppliers to complete and submit online in order to do business together.

#### Quick Steps

1. Log into Ariba Network (AN) to access the PSE Registration Questionnaire
2. Complete the Supplier Registration Questionnaire
3. Submit the Supplier Registration Questionnaire
4. Monitor status of registration approval (as needed)

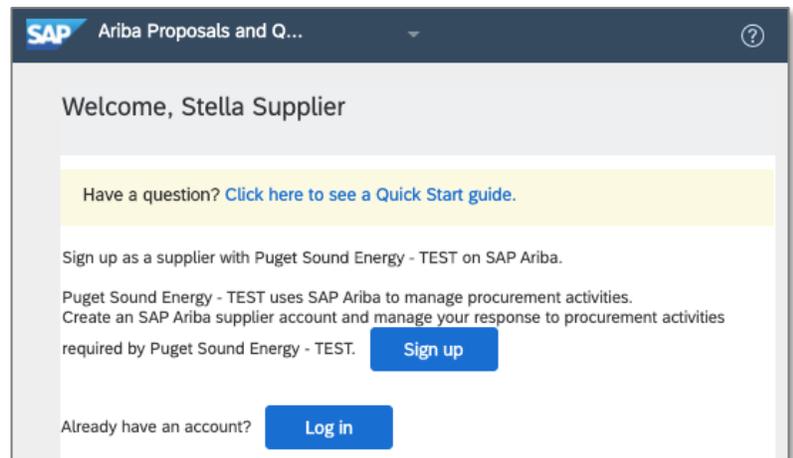
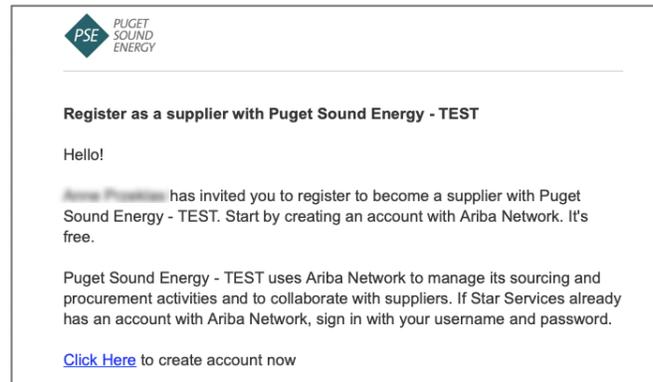
### Step 1: Log into AN to access the PSE Registration Questionnaire

When invited to register on the Ariba Network as a Supplier of PSE, you will receive an automated email notification to initiate the registration process in Ariba.

- A. From the email notification, click the hyperlink provided to open the online Ariba Network
  - This will open the Ariba Welcome page, where you can either choose to sign in to an existing Ariba Network account or create a new one.
- B. If you have an active Ariba Network account, click “**Log In**” on the Welcome page.
  - Upon logging in to your account, the PSE Questionnaire will automatically appear on your dashboard.

If you do NOT have an account and need to create one, click “**Sign Up.**”

- This will open the standard form Ariba requires all new suppliers to complete with basic company and user information.
- Once this is complete, you will be able to log in and access PSE questionnaire.



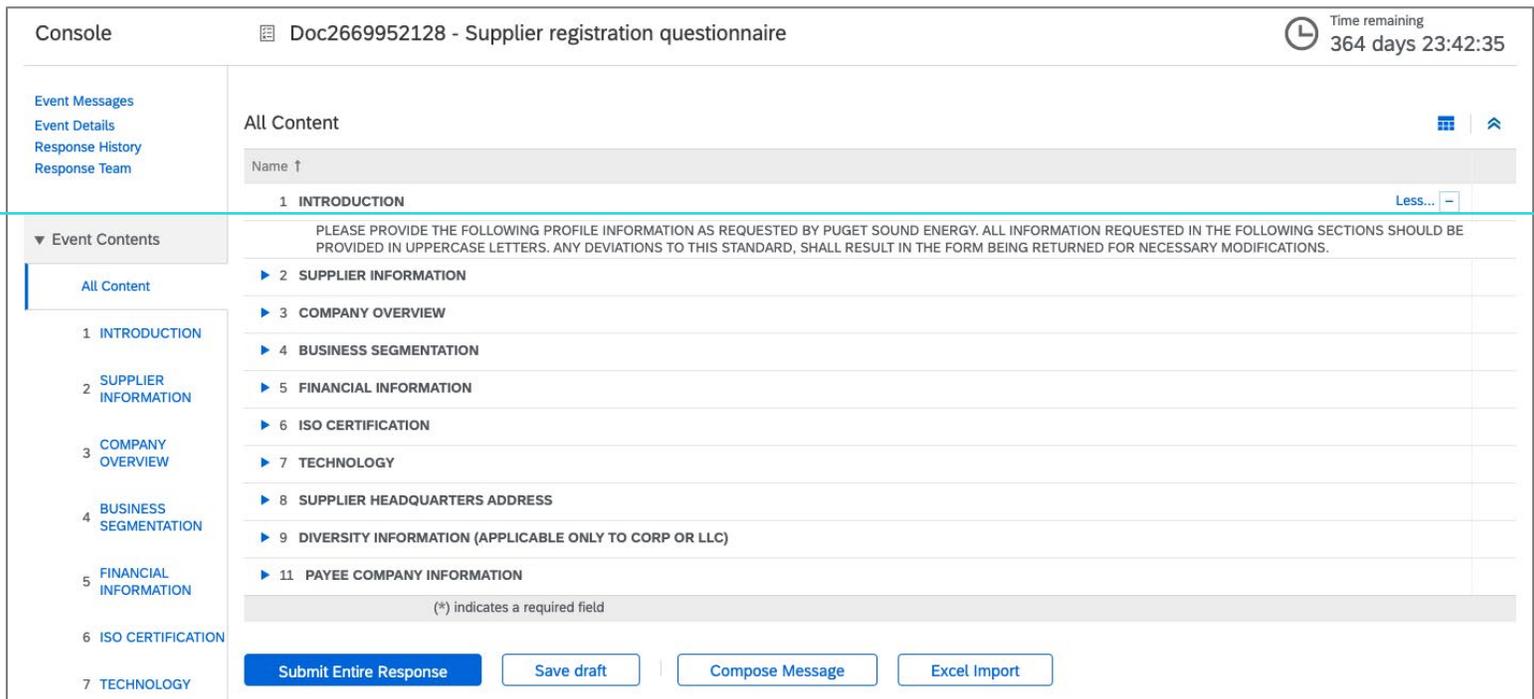
### Step 2: Complete the Supplier Registration Questionnaire

#### A. Open the PSE Supplier Registration Questionnaire (can be accessed from your Ariba dashboard)

- This will open the blank registration questionnaire form to be completed.

The **Supplier Registration Questionnaire** collects all information required for doing business with PSE. The questionnaire is organized into sections; you can save your progress at any point.

- ❖ Questionnaire response types include open text fields/boxes, multiple choice drop downs and Yes/No selections, among others. Some fields require attachments to be uploaded.
- ❖ Your responses may trigger additional questions to appear in the form that require additional information and/or attachments to be submitted.
- ❖ All fields marked with an asterisk (\*) are required to be completed before submitting.
- ❖ It is recommended to collect all relevant documentation before starting your response to ensure the necessary information is readily available for timely and efficient completion of the questionnaire.



#### B. Complete all required fields within each section of the questionnaire

- By default, the contents table will display “All Contents,” which shows all questionnaire sections consecutively to allow for continuous scrolling between sections and fields. The **Event Contents** menu on the left can be utilized to display one section at a time or to jump between sections.
- Response progress can be saved as needed by clicking “**Save draft**” under the questionnaire table. Given the larger extent of information to fill-in, it is recommended to **save** responses often to help prevent potential data loss while completing each section. *Please note, saved responses will NOT be visible to PSE until the entire response officially submitted.*

**The following pages provide key notes to be aware of as you complete each section of the questionnaire.**

### Step 2: Complete the Supplier Registration Questionnaire (Notes by Section)

#### Section 2 – Supplier Information

<ul style="list-style-type: none"> <li>6 ISO CERTIFICATION</li> <li>7 TECHNOLOGY</li> <li>8 SUPPLIER HEADQUARTER...</li> <li>9 DIVERSITY INFORMATIO...</li> <li>10 INSURANCE CERTIFICAT...</li> </ul>	<p>2.2 COMPANY TAX OVERVIEW</p> <p>2.2.1 WILL YOU PROVIDE A TAX IDENTIFICATION NUMBER OR SOCIAL SECURITY NUMBER ?</p> <p>2.2.2 PROVIDE TAX IDENTIFICATION NUMBER.</p> <p>2.2.4 ARE WASHINGTON SALES TAXES COLLECTED?</p> <p>2.2.5 W-8 NUMBER (IF APPLICABLE, FOREIGN SUPPLIER) OR W-9:</p> <p>2.2.7 W-9 ATTACHMENT:  <a href="https://www.irs.gov/pub/irs-pdf/fw9.pdf">https://www.irs.gov/pub/irs-pdf/fw9.pdf</a></p> <p><small>(*) indicates a required field</small></p>	<p>* TAX IDENTIFICATION NUMBER ▾</p> <p>* 123456789</p> <p>* Yes ▾</p> <p>* W-9 ▾</p> <p>* <a href="#">W9 Document.pdf</a> ▾ Update file Delete file</p>
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- You can provide either Tax ID or SSN.
- You can provide either W8 or W9.

#### Section 3 – Company Overview

<p>Event Contents</p> <ul style="list-style-type: none"> <li>All Content</li> <li>1 INTRODUCTION</li> <li>2 SUPPLIER INFORMATION</li> </ul>	<p>3 COMPANY OVERVIEW</p> <p>3.1 HOW MANY YEARS IN BUSINESS SINCE FORMATION?</p> <p>3.2 PLEASE PROVIDE A BRIEF OVERVIEW OF THE COMPANY.</p> <p>3.3 HOW MANY PERMANENT EMPLOYEES DOES THE COMPANY HAVE?</p>	<p>* 15</p> <p>* We are a professional services company specializing in business management and corporate advisory services.</p> <p>* 50</p>
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- You can add attachment(s) to help further explain the company overview (Optional).

#### Section 4 – Business Segmentation

<p>Event Contents</p> <ul style="list-style-type: none"> <li>All Content</li> <li>1 INTRODUCTION</li> <li>2 SUPPLIER INFORMATION</li> <li>3 COMPANY OVERVIEW</li> <li>4 BUSINESS SEGMENTATION</li> <li>5 FINANCIAL INFORMATION</li> <li>6 ISO CERTIFICATION</li> <li>7 TECHNOLOGY</li> <li>8 SUPPLIER HEADQUARTER...</li> </ul>	<p>4 BUSINESS SEGMENTATION</p> <p>4.1 DOES THE COMPANY PROVIDE MATERIALS AND / OR SERVICES?</p> <p>4.2 WHAT WASHINGTON COUNTIES DOES THE COMPANY PROVIDE MATERIAL AND / OR SERVICES TO? SELECT ALL THAT APPLY.</p> <p>4.3 PLEASE SELECT CATEGORIES BY EXPANDING OPTIONS AND SELECTING ALL APPLICABLE CATEGORIES AT THE LOWEST LEVEL.</p> <p>4.4 PLEASE PROVIDE BRIEF SUMMARY OF THE COMPANY COMPETITIVE ADVANTAGE(S).</p>	<p>* BOTH ▾</p> <p>* <input type="checkbox"/> ISLAND</p> <p><input type="checkbox"/> KING</p> <p><input type="checkbox"/> KITSAP</p> <p><input type="checkbox"/> KITTITAS</p> <p><input type="checkbox"/> LEWIS</p> <p><input type="checkbox"/> PIERCE</p> <p><input type="checkbox"/> SKAGIT</p> <p><input type="checkbox"/> SNOHOMISH</p> <p><input type="checkbox"/> THURSTON</p> <p><input type="checkbox"/> WHATCOM</p> <p><input checked="" type="checkbox"/> ALL WASHINGTON STATE</p> <p>* Management And Business Professionals An... [ select ]</p> <p>* Highly experienced and professional employees with specialized skill sets to fit needs.</p>
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- 4.1 – This selection will determine the Insurance Certification requirements (Section 10).**
  - If “Both” or “Services” is selected, Section 10 will be required.
  - If “Materials” is selected, Section 10 will no longer appear.

### Step 2: Complete the Supplier Registration Questionnaire (Notes by Section)

#### Section 5 – Financial Information

Event Contents All Content 1 INTRODUCTION 2 SUPPLIER	5 FINANCIAL INFORMATION	
	5.1 PUBLIC OR PRIVATE?	<input type="text" value="PRIVATE"/>
	5.3 PLEASE PROVIDE LATEST FINANCIAL REPORT (10K, 10Q, OR COMPARABLE INFORMATION).	<a href="#">10K Document.pdf</a> <a href="#">Update file</a> <a href="#">Delete file</a>
	5.4 IS THE COMPANY CURRENTLY IN ANY DISCUSSIONS ABOUT BEING ACQUIRED?	<input type="text" value="No"/>
	5.5 DOES THE COMPANY HAVE ANY PENDING LITIGATION?	<input type="text" value="No"/>

- **5.1 – If “Public” is selected, an additional field will appear to provide the Stock Ticker Symbol.**

#### Section 6 – ISO Certification

Event Contents All Content 1 INTRODUCTION 2 SUPPLIER INFORMATION 3 COMPANY OVERVIEW 4 BUSINESS REGISTRATION	6 ISO CERTIFICATION	
	6.1 IS THE COMPANY ISO 9001 CERTIFIED (QUALITY MANAGEMENT)?	<input type="text" value="YES"/>
	6.2 IS THE COMPANY TS 16949 CERTIFIED (QUALITY SPECIFICATION AUTOMOTIVE INDUSTRY)?	<input type="text" value="NO"/>
	6.3 IS THE COMPANY ISO 14001 CERTIFIED (ENVIRONMENTAL MANAGEMENT)?	<input type="text" value="NO"/>
	6.4 IS THE COMPANY ISO 26000 CERTIFIED (SOCIAL RESPONSIBILITY)?	<input type="text" value="NO"/>
	6.5 IS THE COMPANY ISO 31000 CERTIFIED (RISK MANAGEMENT)?	<input type="text" value="NO"/>
	6.6 IS THE COMPANY ISO 50001 CERTIFIED (ENERGY MANAGEMENT)?	<input type="text" value="IN PROGRESS"/>
	6.7 IS THE COMPANY ISO 9001 COMPLIANT (OTHER)?	<input type="text" value="NO"/>

- **“YES”** = Supplier is actively certified. *Please attach valid certificate showing effective & expiration dates.*
- **“NO”** = Supplier is NOT actively certified.
- **“IN PROGRESS”** = Supplier is NOT certified but is actively working to obtain the certification. *Please provide comments on current status and anticipated effective date.*

#### Section 7 – Technology

Event Contents All Content 1 INTRODUCTION 2 SUPPLIER INFORMATION	7 TECHNOLOGY	
	7.1 WILL THE COMPANY AGREE TO TRANACT THROUGH THE ARIBA NETWORK?	<input type="text" value="Yes"/>
	7.2 DOES THE COMPANY HAVE THE CAPABILITY TO UTILIZE ELECTRONIC DATA INTERCHANGE (EDI) FOR ORDER ENTRY?	<input type="text" value="Yes"/>
	7.3 IS YOUR ARIBA ACCOUNT ENTERPRISE OR STANDARD ?	<input type="text" value="ENTERPRISE"/>
	7.4 ARIBA NETWORK ID:	<input type="text" value="12345678"/>

- If you are unsure which type of Ariba Network account you have, you can return to the homepage in Ariba (recommend saving questionnaire progress first!) and view your account settings. *Standard accounts are free to suppliers. Enterprise accounts do have fees involved with transacting over AN.*

#### Section 8 – Supplier Headquarters Address

Event Contents All Content	8 SUPPLIER HEADQUARTERS ADDRESS	
	<a href="#">Show More</a> Street: <input type="text" value="1300 University Drive"/> House Number: <input type="text"/>	
	Street 2: <input type="text"/>	

- You are asked to provide address details for three key locations in this section: *Company Headquarters, Nearest Office to Kent, Washington and Nearest Location of Salesperson.*

### Step 2: Complete the Supplier Registration Questionnaire (Notes by Section)

#### Section 10 – Insurance Certificate Information (IF APPLICABLE)

<ul style="list-style-type: none"> <li>Event Contents</li> <li>All Content</li> <li>1 INTRODUCTION</li> <li>2 SUPPLIER INFORMATION</li> <li>3 COMPANY OVERVIEW</li> </ul>	<p>▼ 10 INSURANCE CERTIFICATE INFORMATION</p> <p>10.1 INSURANCE AGENT COMPANY NAME: * A1 Insurance</p> <p>10.2 INSURANCE AGENT PHONE NUMBER: * 8884006767</p> <p>10.3 EXTENSION:</p> <p>10.4 INSURANCE AGENT EMAIL ADDRESS: * sam@a1insurance.com</p> <p>10.5 ATTACH INSURANCE CERTIFICATE(S): * <a href="#">COI Document.pdf</a> Update file Delete file</p> <p>10.6 INSURANCE EXPIRATION DATE: * Fri, 3 Sep, 2021</p>
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- **NOTE:** This entire section will ONLY appear if you will provide services to PSE, as specified in Section 4 of the Registration Questionnaire.

#### Section 11 – Payee Company Information

<ul style="list-style-type: none"> <li>Event Contents</li> <li>All Content</li> <li>1 INTRODUCTION</li> <li>2 SUPPLIER INFORMATION</li> <li>COMPANY</li> </ul>	<p>▼ 11 PAYEE COMPANY INFORMATION</p> <p>11.1 WOULD YOU LIKE TO BE PAID BY CREDIT CARD? * No</p> <p>11.4 WOULD YOU LIKE TO BE PAID BY ACH? * Yes</p> <p>11.6 REMITTANCE COMPANY NAME: * Money Managers Inc.</p> <p>Street: 123 Main Street</p> <p>City: * Bothell</p>
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- These selections will determine the payment information required to collect.
  - These selections will impact the fields appearing in this section.
  - If "Yes" is selected for being paid by ACH, Section 12 will appear to be completed.

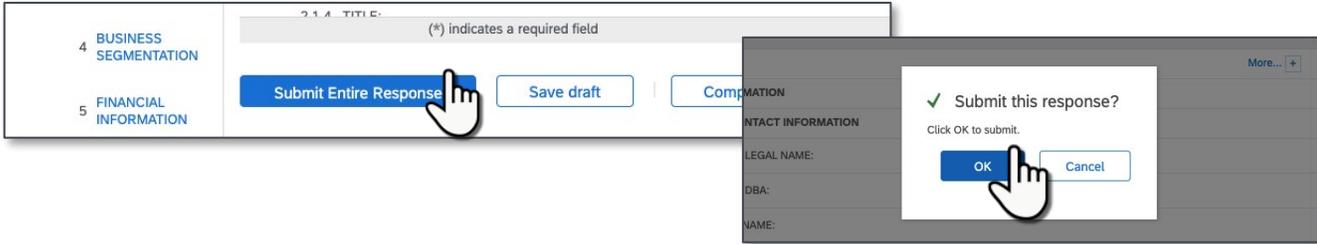
#### Section 12 – ACH Vendor Miscellaneous Enrollment (IF APPLICABLE)

<ul style="list-style-type: none"> <li>Event Contents</li> <li>All Content</li> <li>1 INTRODUCTION</li> <li>2 SUPPLIER INFORMATION</li> <li>3 COMPANY OVERVIEW</li> <li>4 BUSINESS SEGMENTATION</li> <li>FINANCIAL</li> </ul>	<p>▼ 12 ACH VENDOR MISCELLANEOUS PAYMENT ENROLLMENT <a href="#">Less...</a></p> <p>PRIVACY ACT STATEMENT : THE FOLLOWING INFORMATION IS PROVIDED TO COMPLY WITH THE PRIVACY ACT OF 1974 (P.L. 93-579). ALL INFORMATION COLLECTED ON THIS FORM IS REQUIRED UNDER THE PROVISIONS OF 31 U.S.C. 332 AND 31 CFR 210. THIS INFORMATION WILL BE USED BY THE TREASURY DEPARTMENT TO TRANSMIT PAYMENT DATA BY ELECTRONIC MEANS TO VENDOR'S FINANCIAL INSTITUTION. FAILURE TO PROVIDE THE REQUESTED INFORMATION MAY DELAY OR PREVENT THE RECEIPT OF PAYMENTS THROUGH THE AUTOMATED CLEARING HOUSE PAYMENT SYSTEM</p> <p>12.1 BANK LOCATION: * WITHIN US</p> <p>12.2 BANK NAME: * Bank of America</p> <p>Street: 900 Metropolitan Parkway</p> <p>City: * Bellevue</p> <p>State/Province/Region: * WA ⓘ</p> <p>Postal Code: * 98111</p>
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- **NOTE:** This entire section will ONLY appear if you will be paid by ACH, as specified in Section 11 of the Registration Questionnaire.

### Step 3: Submit the Supplier Registration Questionnaire

Once all required fields are complete and you are ready to submit for PSE review, **click “Submit Entire Response,”** then click **“OK”** to confirm submission.



### Step 4: Monitor status of registration approval (as needed)

When the questionnaire is submitted, it will appear on your home dashboard in “Pending Approval” status while PSE reviews your questionnaire responses for approval.

- If additional information is needed in order to approve, you will receive an email notification with the request details and a hyperlink to access the questionnaire to revise the response.

**Once your supplier registration is approved by PSE, you will receive an automated email notification.**

- Upon logging into the supplier portal, the questionnaire will appear on your home dashboard in “Registered” status.

Hello Sarah Supplier,

Congratulations! Your supplier registration was approved.

Log in to the supplier portal to see if you need to complete any tasks or qualifications before you can start doing business with Puget Sound Energy - TEST.

[Click Here](#)

- Submitted responses can be viewed for historical purposes or as needed by clicking on the appropriate title under the Registration Questionnaire section on the home dashboard

