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## Providing and Updating a Certificate of Insurance in Ariba

10/2021



- WR Grace uses the Supplier Management module within Ariba to engage with suppliers on multiple levels. We gather profile information, send questionnaires, and invite suppliers to participate in sourcing events.
- This module also allows us to request certificates from suppliers and automatically send notifications when those certificates are about to expire.
- If Grace determines that the goods or services your organization provides require insurance coverage we will reach out via an email invitation through Ariba to provide a Certificate of Insurance (COI).
- The below screenshot from the questionnaire outlines Grace's requirements:

Downlo	ad Content	Print Event Information	Review Response	Download Bid Cha	nge Report	
All Content						
Name †						
1 Introduction					Less	
Commencing completely pe • Worke minim • Comm Dama	with the effective date of arformed, or until such lat rs' Compensation Insural um limit of \$1,000,000. ercial General Liability In- so Licbility with minimum	Grace issued Purchase Orders or Ag er time as set forth herein, VENDOR/ nce for statutory limits in compliance of surance including Owners Protective, limits of \$1,000,000,amp concurrence.	greements executed and on file CONTRACTOR shall maintain with the applicable state and fer , Products/Completed Operation	and continuing until all servic standard insurance policies a leral laws and Employer's Lia is, and Contractual coverage	es hereunder have b s follows: ability insurance with and Broad Form Pro	een a operty

You will receive a system generated invitation email with the subject "Action Needed: Complete questionnaire from WR Grace".

- The email will have the Questionnaire Name and the deadline for responding.
- Click "See
   Questionnaire"
- You will be directed to log in to your Ariba account and then the questionnaire will open.

WR Grace
Hello Joe Hickman,
WR Grace has invited you to complete a questionnaire. This is required so Joe's Testing can do business with WR Grace.
Questionnaire Overview Questionnaire name: Indirect Certificate of Insurance Respond by: Mon, 06 Jul, 2020
See questionnaire
Best,
SAP Ariba team
You are receiving this email because your customer, WR Grace, has identified you as the appropriate contact for this correspondence. If you are not the correct contact, please contact WR Grace.
Offices   Data Policy   Contact Us   Customer Support

- Review the Introduction Section with Grace's requirements. Feel free to send this information to your insurance provider when you request the COI.
- Please make sure that effective and expiration dates on COI are actual and certificate holder is: W.R. Grace & Co, - Conn., 7500 Grace Drive Columbia, MD 21044
- Once you have obtained a COI, change the answer to Question 2 to "YES". After you make that change, the word "Details" will appear.
- Click "Details"

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	<ul> <li>Automobile Liability Instant one occurrence, a</li> </ul>	iern. surance including owned, no nd Bodily Injury Liability mini	n-owned and hired automobiles imum limits of S 1,000,000 each	, with Property Damage Liability person, \$1,000,000 each accide	minimum limits of \$1,000,000 ent.	
1	he foregoing insurance shal urnished to GRACE. Such c	I be maintained with carriers ertificates:	satisfactory to GRACE, and the	terms of coverage shall be as e	videnced by certificates to be	
	Shall include waiver of Shall provide that ten ( Shall show Certificate	Insurance clauses contained subrogation in favor of work (10) days written notice be gi Holder as W. R. Grace & Co	d in GRACE's Purchase Order o ers compensation policy. iven to GRACE prior to cancellat Conn., 7500 Grace Drive, Colu	tion of any policy. umbia, MD 21044.	иен ине аррисарие	
2 Wh organi after u	en you have obtained a Certi ation's Certificate of Insuran odating your response	ce form by clicking the "Detai	hark the response as "Yes" and the ils" link that will appear to the rig	ght of your answer	* Yes 🗸 Details	•
2 Wh organi after u	en you have obtained a Certri cation's Certificate of Insuran odating your response. (*) indicates a r	ce form by clicking the "Detai required field	aark the response as "Yes" and tr ils" link that will appear to the rig	ght of your answer	* Yes V Details	<b>*</b>

## **Responding to the COI Questionnaire in Ariba**

- A pop-up window will appear where you will need to provide the certificate details in the fields with the red stars.
- In the attachment field upload your certificate.
- You can add any additional comments in the Description box.
- Click OK.

2 When you have obta	ined a Certificate of insurance, please mark the response as "Yes" and then attach
Enter details for Certificate. Ent	er the location of a file to add as an Attachment. To search for a More
Certificate Type:	Indirect Certificate of Insurance
Issuer: *	TEST Issuer
Year of Publication: *	2020
Certificate Number: *	123TEST
Certificate Location: *	USA
Effective Date: *	Mon, 6 Jul, 2020
Expiration Date: *	Tue, 6 Jul, 2021
Attachment: *	T TEST DOCUMENT_2.docx Delete
	Choose File No file chosen
	Or drop file here
	Description:
	OK Cancel

o back to WR Grace Dashbo	ard	
Console	E	- Indirect Certificate of Insurance
Event Messages Event Details Response History	All Content	
Response Team	Name †	
	1 Introduction	
<ul> <li>Event Contents</li> </ul>	2 When you have obtain Certificate of Insurance fo	ed a Certificate of insurance, please mark the response as "Yes" and then attac rm by clicking the details link that will appear after updating your response.
All Content	(*) i	ndicates a required field
1 Introduction	Submit Entire Respons	e Reload Last Bid Save draft C
	Submit Entire Respons	Save didit

- After you provide the certificate details, click "Submit Entire Response"
- You can also save a draft and come back to the questionnaire to make changes prior to submission

After you submit the questionnaire it will need approval from Grace before it can be posted to your Supplier Profile in the Supplier Management section of Grace's Ariba environment.

You can see the status of your questionnaire from the Proposals and Questionnaires section in Ariba, on the WR Grace page.

				No items				
Questionnaires								
Title			ID	End Time 4	Commodity	Region	Status	
▼ Status: Completed (1)								
Indirect Certificate of Insurance				7/1/2021 1:44 PM	(no value)	All All	Pending Approval	>
Certificates								=
Certificate Info	Effective	Expiration	Attachment				Questionnaire	Status

Once your questionnaire has been approved by Grace it will show up in the Certificates section below the Questionnaires and you will be able to access both the questionnaire and certificate from this page. If you need to make any changes to the certificate or the data you provided in the details pop-up you must do so by opening the Indirect Certificate of Insurance Questionnaire, **NOT** the certificate itself.

In the next slides we will provide instructions on updating an expired COI.



Two weeks before the expiration date of your certificate you will receive an email from Ariba Administration <u>no-reply@ansmtp.ariba.com</u> with the subject "**Your Indirect Certificate of Insurance with WR Grace Expires on** \**EXPIRATION DATE*\*"

- Use the "Click Here" link in the email to log into Ariba
- You can also log in from proposals.seller.ariba.com that will take you directly to the Proposals and Questionnaires page of Ariba, then open the WR Grace tab to locate the COI questionnaire.

WR Grace	
Hello Joe Hickman,	
Please upload a new Indirect Certificate of Insurance before the current certificate expires on Tue, 06 Jul, 2021.	
Click Here to upload the certificate in Indirect Certificate of Insurance.	
Best,	
SAP Ariba team	
You are receiving this email because your customer, WR Grace, has identified you as the appropriate contact this correspondence. If you are not the correct contact, please contact WR Grace.	or
Offices   Data Policy   Contact Us   Customer Support	

Locate and open your Indirect Certificate of Insurance Questionnaire

Questionnaires							
Title	ID		End Time 🕴	Commodity	Regions	Status	
▼ Status: Completed (2)							
Quality Questionnaire Test	Doc2592	2413609	9/2/2020 10:36 AM	(no value)	All All	Approved	
Payment Terms Offer	Doc2378	3262365	5/21/2020 3:10 PM	(no value)	(no value)	NotRespon	ded
▼ Status: Open (1)							
Indirect Certificate of Insurance	Doc2287	7061329	6/6/2022 3:44 AM	(no value)	All All	Expiring	
Certificates							=
Certificate Info	Effective	Expiration	Attachment	Questionna	ire		Status
Indirect Certificate of Insurance	7/6/2020	7/6/2021	TEST DOCUMENT_2.docx	Indirect Ce	rtificate of Insurance		Expiring

Ariba Sourc	sing	Company Settings - Joe Hickman - Help Center
Go back to WR Grace Dashbo	ard	Desktop File Sync
Console	Doc2287061329 - Indirect Certificate of Insurance	Time remaining 339 days 13:34:54
Event Messages Event Details Response History	If your customer has requested an update to this questionnaire, please click <b>Revise Response</b> and re-sub current answers, your customer cannot complete their evaluation until you re-submit the questionnaire.	mit your answers. Even if you do not need to change any of your
<ul> <li>Response leam</li> <li>▼ Event Contents</li> </ul>	Revise	Response
All Content	All Content	
1 Introduction	Name †	
	1 Introduction	Less
	Commencing with the effective date of Grace issued Purchase Orders or Agreements executed completely performed, or until such later time as set forth herein, VENDOR/CONTRACTOR shal	and on file and continuing until all services hereunder have been Il maintain standard insurance policies as follows:
	2 When you have obtained a Certificate of insurance, please mark the response as "Yes" and then atta Insurance form by clicking the details link that will appear after updating your response.	tch your organization's Certificate of Yes Details
	Compose Message	
SAP Ariba M		

- Click Revise Response, then click OK in the pop-up warning message.
- Update the Details screen with the data from the new COI.
- Delete the old attachment and upload the new COI document. Ensure effective and expiration dates on COI are actual and certificate holder is W.R. Grace & CO. – Conn. (see slide 4 for address).
  - Resubmit the Questionnaire.

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 Once approved the new COI will appear in your certificates.