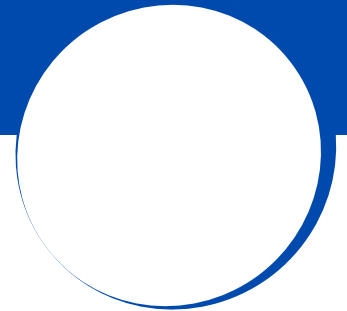


LIFESPACE
COMMUNITIES®



Completing New Supplier Onboarding

For brand new suppliers, interested in doing business with Lifespace.



Completing New Supplier Onboarding

➔ Lifespace Completes New Supplier Request

STEP #1: Lifespace Team Member submits a New Supplier Request

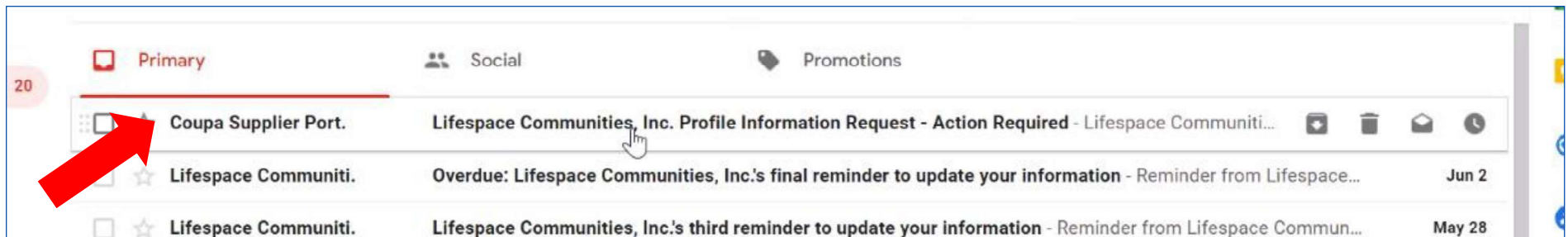
- Information Entered:
 - Full name, email address, and phone number
- Once submitted, and approved internally, you as the supplier will receive an email.

REMINDER: Supplier Requirements to Do Business with Lifespace:

- Be willing to interact via email
- Be willing to be paid by virtual credit card, ACH, or digital check.
- **If you're willing to use the Coupa Supplier Portal (CSP) that is a bonus.

Completing New Supplier Onboarding

➔ Step 1: Supplier Receives Email Invitation

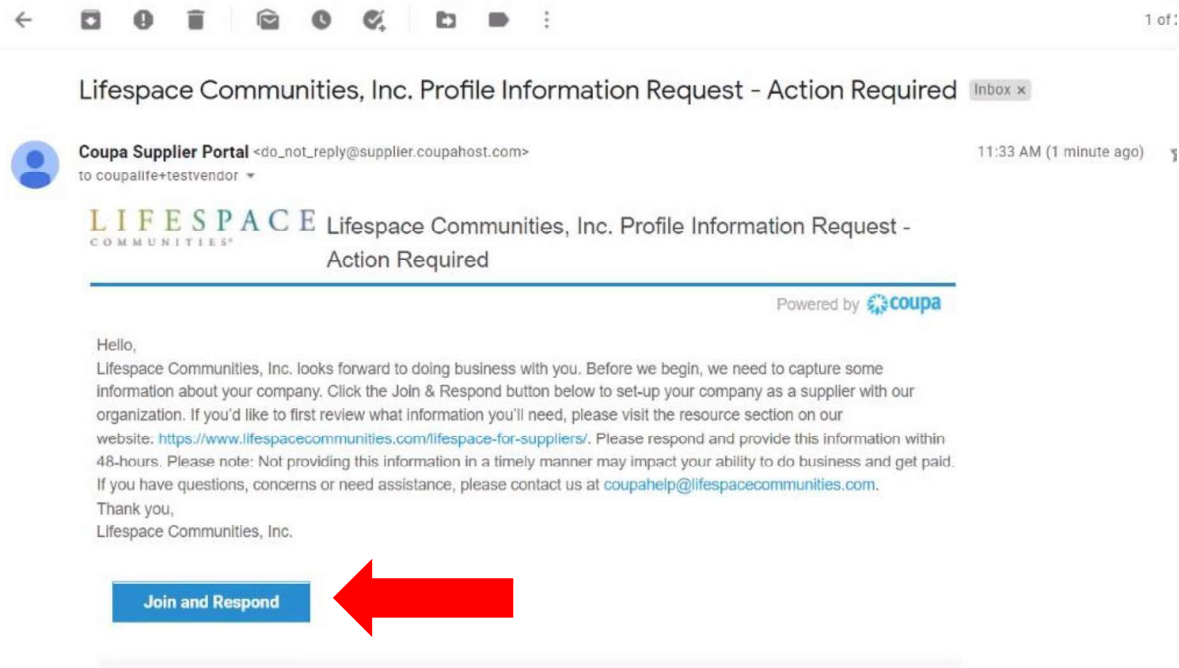


STEP #2: You will receive an email from Coupa Supplier Portal

Please note, you will receive this email after all internal approvals have gone through. Typical 48 business hours after the Lifespace team member submits Step 1.

Completing New Supplier Onboarding

➔ Step 1: Supplier Receives Email Invitation



This is what the email will look like when you open it up. You will need to click on the “Join and Respond” button to begin completing the onboarding forms.

Completing New Supplier Onboarding

➔ Step 2: Activate Your Coupa Account

The screenshot shows a web form titled "Activate your Coupa account" for the email address "coupalife+testvendor@gmail.com". The form contains the following sections:

- Company name:** A text input field containing "Test Vendor DBA Name". A red arrow points to this field.
- Your name:** Two text input fields, one for "Test first name" and one for "Vendor last name". Red arrows point to both fields.
- What's your role at your business?:** Three radio button options: "Customer Success Manager" (selected), "Accountant", and "Something else". A red arrow points to the "Customer Success Manager" option.
- Create a password:** Two password input fields. The first field is empty, and the second field contains a cursor. A red arrow points to the first field. Below the fields is a note: "- Use at least 8 characters and include a number and a letter."

- After clicking “Join and Respond”, your browser will open another tab and you’ll be prompted to “Activate your Coupa account”
 - In order to complete the Supplier Onboarding forms, you **must** activate your account, even if you do not plan on using the Coupa Supplier Portal to interact with Lifespace.
- Starting here, enter your Supplier Information (NOTE: Do not enter the same information seen in screenshots)

Completing New Supplier Onboarding

➔ Step 4: Legal Name, Display Name & Contact Info

The screenshot shows a web form for supplier onboarding. It is divided into two main sections: 'Legal Name of Supplier' and 'Primary Contact'.
The 'Legal Name of Supplier' section has a text input field containing 'Test Vendor DBA Name' and a note: 'Please be sure this matches your W9'.
The 'Display Name' section has a text input field also containing 'Test Vendor DBA Name' and a note: 'Doing Business As or Trade Name'.
The 'Primary Contact' section is titled 'Supplier Contact Information' and contains several fields:
- 'First Name' with 'Test first name'
- 'Last Name' with 'Vendor last name'
- 'Email address' with 'coupallife+testvendor@gmail' and a help icon.
- 'Work Phone' with a dropdown set to 'US/Canada', a phone number '+1 (515) 288-5805', and a small '650-555-1212' below it.
- 'Mobile Phone' with a dropdown set to 'US/Canada' and a small '650-555-1212' below it.
- 'Fax' with a dropdown set to 'US/Canada' and a small '650-555-1212' below it.
Red arrows point from text boxes to the 'Legal Name of Supplier' and 'Display Name' fields. A red bracket highlights the 'Supplier Contact Information' section, with an arrow pointing to a text box on the right.

Enter your legal business name

Display name can be a DBA if you have one. If you enter nothing, this will be auto-filled with your legal name.

The contact information field may already be pre-filled. Double check that information is correct and/or fill in any missing information.

Completing New Supplier Onboarding

➔ Step 5: Primary Address & PO Email

* Supplier Primary Address

Address Purpose ⓘ

* Region

Country/Region ▼

State Region ▼

Address Name

* Street Address

Street Address 2

* City

* Postal Code

Location Code

This address is your primary business address. You will be asked to also create a REMIT address later in this form. When you create the REMIT address later, you will also setup your digital payment account.

* PO Email ⓘ

Our preferred method to send purchase orders to suppliers is via email. If you aren't willing to receive POs via email, please call 888-668-6686 or AP@Lifespacecommunities.com

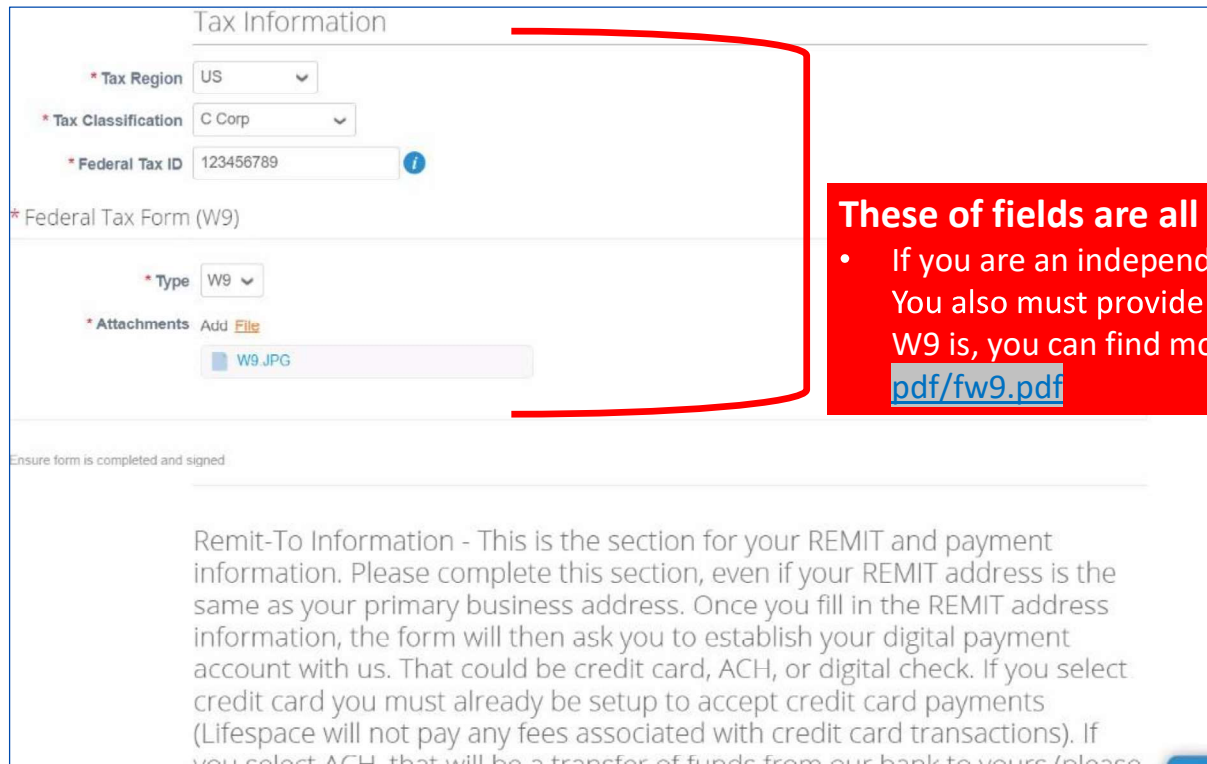
Continue scrolling and enter the primary address for your business.

- *Please be sure to complete every field with a star.*

You'll also fill in the email address for us to transmit Purchase Orders (PO) to. This is necessary for us to do business with you. We will need to email you the PO, so you know you have a real commitment from us for your goods or services. This will be pre-filled with the contact email from the form. Change it if you want POs going to a different email address.

Completing New Supplier Onboarding

➔ Step 6: Tax Information



The screenshot shows a 'Tax Information' form with the following fields:

- * Tax Region: US (dropdown)
- * Tax Classification: C Corp (dropdown)
- * Federal Tax ID: 123456789 (text input)
- * Federal Tax Form (W9)
 - * Type: W9 (dropdown)
 - * Attachments: Add File (button), W9.JPG (file upload)

A red box highlights the Tax Region, Tax Classification, Federal Tax ID, and the W9 section. Below the form, there is a section for 'Remit-To Information' with explanatory text.

After completing your primary address & entering your PO Email Address, you'll begin the Tax Information.

These of fields are all required for us to do business with you.

- If you are an independent contractor, your SSN# may be your tax-ID. You also must provide us with a W9. If you're not familiar with what a W9 is, you can find more info at <https://www.irs.gov/pub/irs-pdf/fw9.pdf>

Completing New Supplier Onboarding

➔ Step 7: Remit-To Address

Ensure form is completed and signed

Remit-To Information - This is the section for your REMIT and payment information. Please complete this section, even if your REMIT address is the same as your primary business address. Once you fill in the REMIT address information, the form will then ask you to establish your digital payment account with us. That could be credit card, ACH, or digital check. If you select credit card you must already be setup to accept credit card payments (Lifespace will not pay any fees associated with credit card transactions). If you select ACH, that will be a transfer of funds from our bank to yours (please be sure to fill in every field). If you select Digital Check, you must maintain and manage a Coupa Supplier Portal (CSP) account in order to receive the digital check. If this section is not completed, we will not be able to establish a business relationship with you.

• 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

Copy of voided check No file chosen

Remit-To Addresses:

This is an important step in the form and will affect our ability to pay you. Please click the “Add Remit To” button to add your business address and payment account.

DO NOT SKIP THIS STEP. If you do not complete this step, you will not be able to complete the form or do business with Lifespace.

Completing New Supplier Onboarding

➔ Step 7a – Remit-To: Entity Name & Country

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.

Where's your business located? (Required fields)

- Enter your legal entity name
- Enter your country
- Click continue


Completing New Supplier Onboarding

➔ Step 7b – Remit-To: Customer Set-Up & Invoices

Tell your customers about your organization

Which customers do you want to see this?

All

Lifespace Communities, Inc. 

What address do you invoice from?

* Address Line 1


Address Line 2


* City

State


* Postal Code

Country/Region

Use this address for Remit-To 

Use this for Ship From address 

REQUIRED FOR INVOICING

Enter the registered address of your legal entity. This is the same location where you receive government documents. 

Which customers do you want to see this (Required Field)

- Choose which customers of yours in Coupa that you want to use this Remit-To

What addresses do you invoice from? (Required Field)

- Fill in the address from which you will be sending invoices
- Check the appropriate boxes pertaining to this address.

Completing New Supplier Onboarding

➔ Step 7c – Remit-To: Tax ID & Miscellaneous

The screenshot shows a web form for supplier onboarding. At the top, there is a dropdown menu for 'Country/Region' set to 'United States'. Below it are two checked checkboxes: 'Use this address for Remit-To' and 'Use this for Ship From address'. A section titled 'What is your Tax ID?' contains another 'Country/Region' dropdown set to 'United States', a 'Tax ID' input field with the value '123456789', and an unchecked checkbox 'I don't have Tax ID Number'. Below this is a link 'Add additional Tax ID'. The 'Miscellaneous' section includes an 'Invoice From Code' input field and a 'Preferred Language' dropdown set to 'English (US)'. At the bottom right are 'Cancel' and 'Save & Continue' buttons.

After checking the appropriate boxes pertaining to the address...

What Is Your Tax ID (Required)

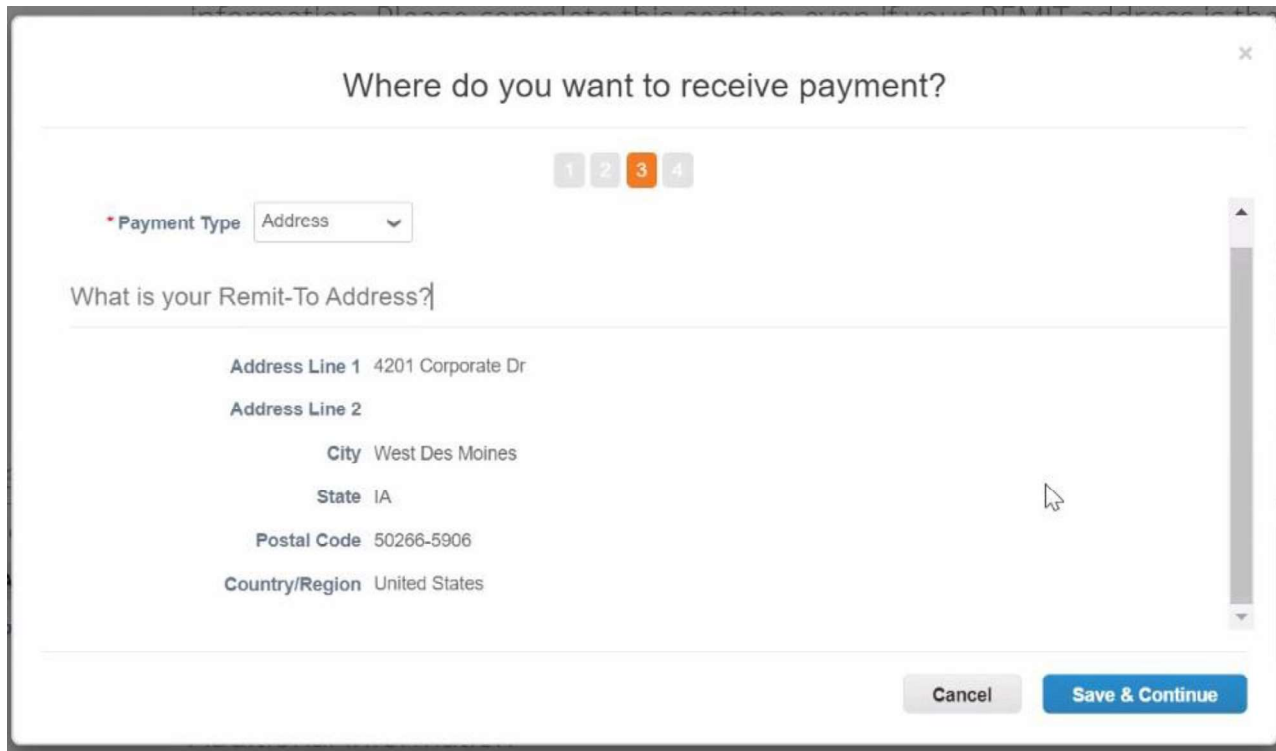
- Enter your country
- Enter your Tax-Id.

Miscellaneous (Optional Field):

- The invoice from code can be filled in if you normally use one. Click “Save & Continue” once all necessary information is filled in.

Completing New Supplier Onboarding

➔ Step 7d – Remit-To: Receive Payments Info



Where do you want to receive payment?

1 2 3 4

* Payment Type Address

What is your Remit-To Address?

Address Line 1 4201 Corporate Dr

Address Line 2

City West Des Moines

State IA

Postal Code 50266-5906

Country/Region United States

Cancel Save & Continue

Where do you want to receive payment? (Required field)

- Confirm information.
- Click “Save & Continue” once all necessary information is filled in.

Completing New Supplier Onboarding

➔ Step 7d – Remit-To: Receive Payments Info

Where do you want to receive payment?

1 2 3 4

Remit-To locations let your customers know where to send payment for their invoices. Click Add Remit-To to add more locations, otherwise click Next.

Add Remit-To

Remit-To Account	Remit-To Address	Status	
Address	4201 Corporate Dr West Des Moines IA 50266-5906 United States	Active	Manage

Deactivate Legal Entity Cancel Next

Where do you want to receive payment? (Required field)

- After clicking save and continue, again, confirm all information is correct. If all correct here, click the “Next” button.

Completing New Supplier Onboarding

➔ Step 7e – Remit-To: Receive Payments Info

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

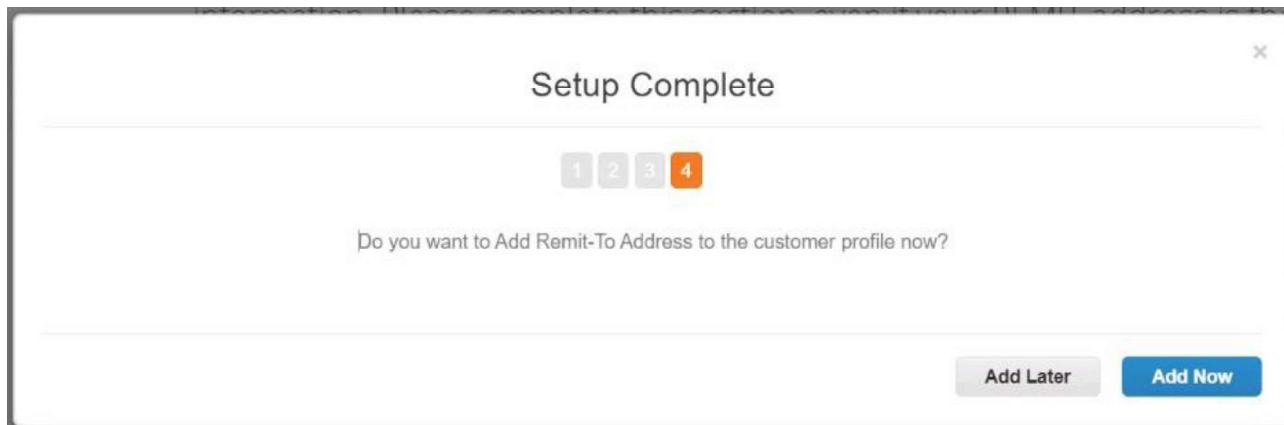
Title	Status	
4201 Corporate Dr West Des Moines IA 50266-5906 United States	Active	Manage

Deactivate Legal Entity Done

Where do you ship goods from? (Required fields)
If you need to create a “Ship From” address, please click that button and add it. Click “Done” button when all is complete.

Completing New Supplier Onboarding

➔ Step 7f – Remit-To: Set-Up Complete



Setup Complete:

Click the “Add Now” button. When you do, you’ll be returned to the new supplier form to finish it up.

Completing New Supplier Onboarding

➔ Step 4: Completing Your Forms (SIM Form 2)

Ensure form is completed and signed

Remit-To Information - This is the section for your REMIT and payment information. Please complete this section, even if your REMIT address is the same as your primary business address. Once you fill in the REMIT address information, the form will then ask you to establish your digital payment account with us. That could be credit card, ACH, or digital check. If you select credit card you must already be setup to accept credit card payments (Lifespace will not pay any fees associated with credit card transactions). If you select ACH, that will be a transfer of funds from our bank to yours (please be sure to fill in every field). If you select Digital Check, you must maintain and manage a Coupa Supplier Portal (CSP) account in order to receive the digital check. If this section is not completed, we will not be able to establish a business relationship with you.

• 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

Copy of voided check No file chosen



Voided Check:

If you are choosing to be paid via ACH, please upload a copy of your voided check.

Completing New Supplier Onboarding

➔ Step 8: Billing Address

* Remit-To Information

Billing Address

Address Name

* Street Address

Street Address 2

* City

* State

* Postal Code

* Country

Banking Information

* Confirm how you would like to be paid ACH Digital Check Virtual Credit Card

Once you've completed the Remit-To Information, you will return to the main form.

- Complete your billing address information. **Please be sure you fill in every block that is required – marked with an ***

Completing New Supplier Onboarding

➔ Step 9: Banking Information

Banking Information

* Confirm how you would like to be paid

- ACH
- Digital Check
- Virtual Credit Card

Select how you want us to pay you. Your options are:

- ACH, Virtual Credit Card, or Digital Check.

Each is explained on the following pages.

Completing New Supplier Onboarding

➔ Step 9a: Banking Information | ACH

Banking Information EXAMPLE

* Confirm how you would like to be paid

ACH
 Digital Check
 Virtual Credit Card

Beneficiary Name

Bank Name

Bank Account Number ⓘ

Bank Routing Number ⓘ

Account Currency

Bank Address

Bank City

Bank State

Bank Postal Code

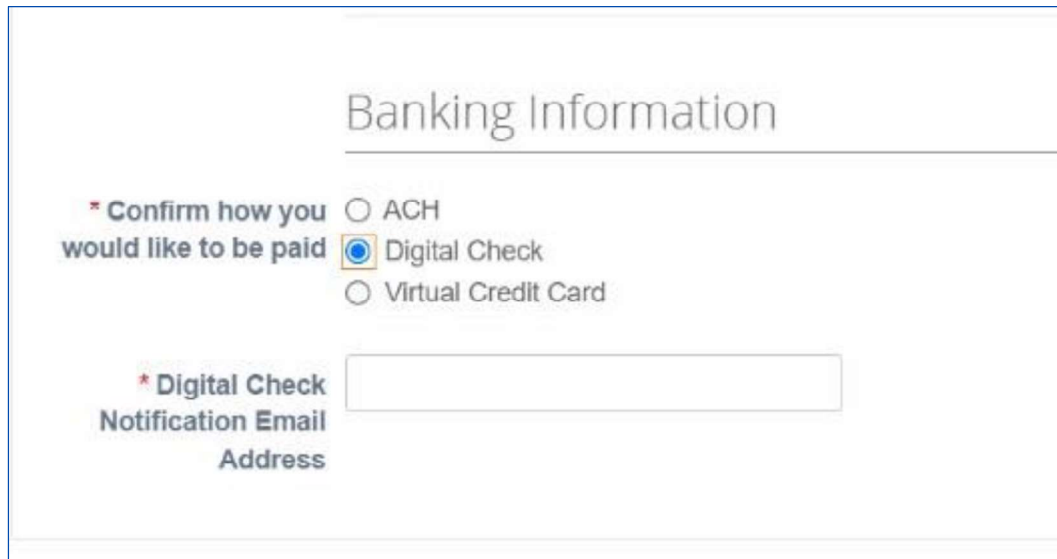
Bank Country

If you choose ACH, we'll pay you by bank transfer from our bank to your bank.

Should you choose this payment method, complete every field in this section even if an * does not appear.
DO NOT LEAVE ANY FIELD BLANK.

Completing New Supplier Onboarding

➔ Step 9b: Banking Information | Digital Check



Banking Information

* Confirm how you would like to be paid

ACH

Digital Check

Virtual Credit Card

* Digital Check Notification Email Address

- If you choose Digital Check, you must maintain a Coupa Supplier Portal (CSP) account. The CSP is the only location you can retrieve the check from.
- If this is what you desire, you must also provide an email address for us to send a notification when a digital check is available for you to retrieve from the CSP.

Completing New Supplier Onboarding

➔ Step 9c: Banking Information | Virtual Credit Card

Banking Information

* Confirm how you would like to be paid

ACH
 Digital Check
 Virtual Credit Card

* Virtual Card Email Address

If you choose Virtual Credit Card, you must have the ability to process a credit card as form of payment. You can't take this card and deposit it in your bank account and you can't use the card to purchase something from another business. If this is what you desire, you must also provide an email address for us to send the credit card credentials to.

Completing New Supplier Onboarding

➔ Step 10: ACH VOIDED CHECK

DID YOU CHOOSE ACH FOR PAYMENT?

- If you chose ACH – You must submit a voided check here.

Reminder, please be sure every field is completed.

Copy of voided check check request.pdf

Completing New Supplier Onboarding

➔ Step II: Payment Terms

Reminder, please be sure every field is completed.

Copy of voided check check request.pdf

Additional Information

Lifespace standard pay terms are Net 30 for virtual credit card and ACH. Lifespace standard pay terms are Net 45 for digital check. If you choose digital check, you must actively manage your Coupa Supplier Portal (CSP) account; the CSP is the only location that you can collect the digital check once paid. The above pay terms are negotiable if you are willing to provide an early pay discount. Please enter your desired pay terms and the early pay discount percent you're willing to offer in the text box below. If Lifespace chooses terms other than what you've requested, you will be notified.

* Requested Payment Terms

Payment Terms Documentation No file chosen

If you have a signed agreement with Lifespace that dictates a specific pay term, please upload it here.

We need your requested payment terms. If you already have a contract or agreement that dictates your particular payment terms, please upload it for the “Payment Terms Documentation.”

Completing New Supplier Onboarding

➔ Step II: Business Relationship Questions

* What is your company supplying Lifespace Communities? Services

* Types of Goods or Services being provided Entertainer

* Will your company be providing services on community premises? Yes No

* Does your company require a specialized license to provide services at the community? Yes No

* Does your company or any of your employees operate in Florida? Yes No
Is your company servicing any Florida Lifespace communities or are your company offices in Florida?

* Will you or your employees, as a service provider, have access to any protected health information of residents or team members of Lifespace Communities? Yes No

As you scroll down, we're asking a series of questions about our business relationship. Please answer every question, as they are all required.

If you select yes to any of these questions, there are additional steps outlined in the following slides:

- YES – Providing services on community premises
- YES – Operate in Florida
- YES – Access to Protected Health Information

Completing New Supplier Onboarding

➔ Step IIa: Operating in Florida

* Does your company or any of your employees operate in Florida?

Is your company servicing any Florida Lifespace communities or are your company offices in Florida?

Will your company or any of your employees be providing services on site at any Lifespace Community in Florida?

I agree to provide a notarized affidavit stating that my company does not employ, contract with, or subcontract with an unauthorized alien

FLORIDA SUBCONTRACTOR LEGAL EMPLOYEES AFFIDAVIT

Pursuant to Florida Statute § 448.095(2)(b) any contractor doing business with a Florida public employer that enters into an agreement with a subcontractor, must require the subcontractor to provide an affidavit stating that the subcontractor does not employ, contract with, or subcontract with an unauthorized alien. Furthermore, the contractor must maintain a copy of this affidavit on file for the duration of the agreement with the subcontractor.

In accordance with the requirement from Florida Statute § 448.095(2)(b) described above, by affixing your signature below, you hereby affirm that the subcontractor does not employ, contract with, or subcontract with any unauthorized alien.

If you are a supplier that **operates in Florida and operates on our community premises**, you will be required to complete a “Florida Subcontractor Legal Employees Affidavit.”

- You can find a link to this form on the new supplier form and on our [website](#).
- Submit form via upload button.

NOTE: This external form must be completed and uploaded to the Supplier Onboarding Form before submission if this applies to you or your organization.

Completing New Supplier Onboarding

➔ Step IIb: Operating with Protected Health Information

* Will you or your employees, as a service provider, have access to any protected health information of residents or team members of Lifespace Communities? Yes No

* By acknowledging that you will have access to PHI, you are required to complete a Lifespace Business Associate Agreement (BAA)

Choose File No file chosen

If you are a supplier that will have access to protected health information (PHI) of residents or team members, you will be required to complete a Lifespace Business Associate Agreement (BAA).


- You can access this directly from the form or on our website [here](#).
- This must be completed and uploaded to this form before submission if this applies to you or your organization.


Completing New Supplier Onboarding

➔ Step 12: Commercial General Liability Insurance

Insurance Information

Commercial General Liability Insurance

Effective Date 

Expiration Date 

Attachments [Add File](#)

Description

If you are only providing goods and not services, this is not required. If you are providing services of any kind, this is required.


If you are a supplier that will be completing significant work on our campuses, you may be required to provide your Commercial General Liability Insurance form. This is generally for contractors and subcontractors. Entertainers are not required to provide this.


Completing New Supplier Onboarding

➔ Step 13: Submitting

Insurance Information

Commercial General Liability Insurance

Effective Date 

Expiration Date 

Attachments [Add File](#)

Description

If you are only providing goods and not services, this is not required. If you are providing services of any kind, this is required.

Once you've completed all the steps for this form, please click the "Submit for Approval" button.

If there are errors, you will receive a notification on the screen. Please fix and submit again.

➔ Step 14: Approval – What happens now?

Once you receive an email telling you you've been approved as a supplier, this is when you can begin doing business with Lifespace.

Top 3 Reminders:

- 1) Business must be approved in Coupa before it can be done.
- 2) If you have a PO number, it must be on your invoice.
- 3) Every invoice must have a unique invoice number.

QUESTIONS?

Please reach out to Lifespace at
CoupaHelp@lifespacecommunities.com