International Monetary Fund

Supplier Reference Guides

- Coupa Risk Assess (CRA)

- Coupa Interface Basics
- Completing Evaluations
- Completing Action Items

Coupa Interface Basics: Dashboard

Program Statuses

Type	Status	Meaning
Evaluation	Not Started	Evaluation has not been accessed (or not saved) by user
	In Process	Evaluation was saved but not submitted
	Completed	Evaluation has been submitted
	Rejected	Evaluation was rejected

The CRA Dashboard serves as your Home Page for CRA – you can view the status of each evaluation and approval here. Refer to the right sidebar on this slide for the explanation of each Status.

Evaluations: you are completing the program

Action items: related to findings identified during assessment of engagements you are involved with

Display Colors

Color	Status
Red	This step is past due and it is not completed or approved (or it is rejected)
Yellow	This step has not been completed or approved and is less than 10 days from the due date
Black	This step has not been completed or approved and is 10 or more days from the due date
Green	This step has been approved or completed

Coupa Interface Basics: Navigation

- The system only displays evaluations and approvals from a certain date range. Click ‘Show Me All’ to see all Evaluations and Approvals. Click ‘View Closed’ to see completed questionnaires

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- Save filters by clicking your name at the top right. You can check ‘Enable Sticky Grids’ in System Settings and update the maximum results per page to 100 in General Settings.

Completing Evaluations

1. Once the due diligence process begins, you will receive automated emails that link to each program.

2. You can view all programs they are assigned on their dashboard. Under evaluations you can click ‘Show Me All’ then click ‘View’ next to the appropriate evaluations.

Completing Evaluations

3. Questions are conditional, so answering the question a certain way could trigger additional questions. All Yes / No questions and ones with an asterisk are required. You can save the program, delegate (see next slide), or submit the form.

Item #	Description	Score	Actions
01.00	Is your firm a public company?	--	
02.00	Please attach OR provide a link to Financial Documents or Statements (e.g. Balance Sheet, Income Statement, Statement of Cash Flows, etc.)		
	Attach Financial Documents Upload		
	Response:		
03.00	Do you have any parent, subsidiary, related, or affiliated companies associated with your company?	--	
04.00	Has your company conducted operations by any other name in the past five (5) years?	--	
05.00	Please enter your firm's 9 Digit Data Universal Numbering System (DUNS) Number or Tax Identification Number		
	Please enter your response *		

Completing Evaluations

4. If you choose to delegate, you must search for a user assigned to that supplier or create a new user by clicking the '+' button next to User. If you create a new user, you will see a pop-up window requesting Email Address, First Name, and Last Name. After creating a user, you can then click 'Delegate'. This user will receive a notification to sign up for Coupa Risk Assess to complete the evaluation.

Completing Evaluations

5. After completing the program, you will click ‘Submit’ and accept that all information provided is valid. You can then complete all remaining programs assigned to you. Completed forms will be sent to the assessors to review and assess responses.

Completing Evaluations

Note: If you submit an evaluation but do not complete all required items, you will receive a pop-up indicating that the evaluation is not completed. You can click the links to the incomplete questions in order to answer them.

Returned Evaluations

1. Occasionally, the IMF will return an evaluation to the supplier for additional information. In these scenarios, the IMF will likely reach out to you with more information on why the evaluation was rejected. Regardless, you will receive an automated email notification with instructions on how to re-access the evaluations.

2. The top of the evaluation will have a comment from the IMF indicating why the evaluation was rejected. Please follow the instructions then re-submit the evaluation. You may consider communicating with your contact at the IMF that you re-submitted the evaluation, but they will receive an automated email from the system as well.

Completing Action Plans

Overview

- In situations where a particular action is required in order to remediate a certain risk, the IMF can create an action item / action plan.
- Reviewers will supplement these action plans in Coupa Risk Assess by contacting the supplier directly with the request.

Completing Action Plans

1. You will receive an automated email when an Action Plan is assigned to you. It will detail the action required as well as the risk assessment, the person who assigned the action plan, and a link to log in to access the Action Plan.

   Note: someone from the IMF should reach out to you regarding any action plan; if you have any questions, please reach out to your IMF contact.

2. The Action Plan will appear on your dashboard under 'Action Plans'. You can click 'Show Me All' under Action Plans to view the status.

3. After clicking 'View' you can click the link to the action item in order to view it then click 'Edit' to update it.

Completing Action Plans

4. If you are ready to complete the Action Plan, you can update the form by filling in the ‘Action Taken/Response’ as well as update the status to ‘Completed’. You can then click ‘Save.’

5. The Action Plan will be marked as completed. You may reach out to your contact at the IMF letting them know that the Action Plan has been completed.