



Buy Smart

Beeline Supplier Toolkit

McKesson uses a single system – Beeline® – to manage all engagements with Outside Services Workers (OSWs). This helps ensure our hiring managers follow our policies by planning ahead and only using approved suppliers.

We look forward to partnering with you as an approved McKesson supplier.

This guide provides onboarding instructions to help you get started.

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Beeline Enablement



Supplier Onboarding Process to Beeline

Pontoon is McKesson's managed services provider (MSP) that facilitates the engagement of all in-scope Outside Services Workers for McKesson (contractors and professional services consultants and project workers).

McKesson's S&P will engage Pontoon when new professional services supplier will be utilizing OSW Program/Beeline VMS (vendor management system) to initiate supplier onboarding process.

Please contact Pontoon at beeline@mckesson.com if you need assistance.

The following is a summary that outlines the process of getting setup as a supplier in Beeline:

Action	What You Need to Know
Engage McKesson	Supplier will engage with McKesson Sourcing & Procurement to finalize the Master Service Agreement (MSA).
Engage Pontoon	McKesson's S&P will engage Pontoon when new professional services supplier will be utilizing OSW Program/Beeline VMS (vendor management system) to initiate supplier onboarding process. Pontoon is McKesson's managed services provider (MSP) that facilitates the engagement of all in-scope Outside Services Workers for McKesson (contractors and professional services consultants and project workers).
Introduction	Pontoon's MSP onsite team will reach out to new supplier for introduction.
Paperwork	<p>Pontoon's Supplier Partnership team will reach out to new supplier via email to begin paperwork and onboarding process.</p> <ul style="list-style-type: none"> Supplier will receive a Pontoon Services Agreement for participation in the program and use of the Beeline VMS tool. This agreement does not override McKesson's MSA but does outline the terms for participation in the Pontoon program including Pontoon's payment responsibilities that do not override McKesson's payment terms. Language is flow down from Pontoon's agreement with McKesson so significant material redlines will not be accepted. Pontoon will complete a credit check for supplier and will collect information needed for VMS setup as well as any supplier diversity certifications. Supplier will receive request for financial forms (W9, CA590, EFT and bank account info).
Request Access to VMS	When all paperwork is finalized, Pontoon will submit a request for supplier set up in the VMS tool. (Can take 5-7 business days but usually occurs sooner).
Login Information	Supplier will receive system login information directly from Beeline.

Beeline Enablement



Supplier Onboarding Process to Beeline (cont.)

Action	What You Need to Know
Training	Pontoon will schedule training session with supplier to address OSW process and system usage.
SOW Set Up	<p>Supplier will be required to do their part of new SOW set up in Beeline each time there is a new SOW/project engagement.</p> <ul style="list-style-type: none"> • Supplier will work with McKesson S&P to finalize SOW. • The business will submit the SOW request in Beeline (to get the budget approved). • After the budget is approved, the supplier will set-up their billing (T&M, fixed fee, combination of both) in Beeline for that specific SOW. • Once the SOW is finalized into a Project (in Beeline), the supplier will add their resources in the tool (billable & non-billable) • Supplier will be responsible for moving resources between SOWs in Beeline, if need arises.
Invoicing	<p>All supplier invoicing for a project will be done through Beeline, whether that be for T&M or for fixed fees and deliverables. Time, expense, and milestone payment requests will be submitted in Beeline and routed to Hiring Manager or Timecard Approver (for temp labor)/Project Manager (for SOW) or delegate approver for approval in Beeline. Once approved, they will be picked up in McKesson's next weekly invoice cycle (runs Weds night/Thurs morning) and will be considered "processed" at that time. Supplier net terms begin on processed date.</p> <ul style="list-style-type: none"> • Supplier/billable resource is responsible for submitting weekly timesheets in Beeline, to bill MCK for the hours worked • Supplier is responsible for submitting milestone payment requests (for fixed fee) in Beeline, to bill MCK for their services
Monitor Beeline	Supplier will be responsible for monitoring status of pending timesheets and milestones in Beeline to ensure they are being approved. Should notify Pontoon if assistance obtaining approvals is needed.
Update	Supplier will be responsible for notifying Pontoon if information in Beeline is inaccurate or changes occur during the project requiring update of information in Beeline.
Communication	Supplier should reach out to Pontoon throughout the process when they need assistance with set up, billing, payment, etc.

FAQs



How does an invoice get paid?

After you submit an invoice or timesheet in Beeline, your customer receives the invoice and will review it for accuracy. If the invoice does not have any errors, your customer approves the invoice for payment, which changes the invoice status to Approved. A weekly invoice run will occur on Thursdays to pick up any approved timesheets, expenses, and SOW payment requests. Once the invoice process runs, the supplier's net terms will begin. Typically, payment should be received based on the set Net Payment Terms provided in the order succeeding the date the invoice was approved.

Where is my purchase order?

There is no purchase order in Beeline. For temp labor and Time & Materials (T&M) billable based SOW projects, each of your workers will have a unique assignment number in Beeline. For SOW/professional services, you will have an SOW # and Project # in Beeline.

How do I create an invoice?

- On the project page, select Milestones tab.
- Check the box for milestone to schedule payment on and click "Schedule Payment"
- Fill out the form (scheduled date, gross amount, name, upload attachment if needed, enter submitted comments) and click OK.
Note: For scheduled date, select a date that reflects the time period, for which you are submitting payment request. For e.g. if the services were performed in January 2017, you may select a date from January, as the "scheduled date" for that payment request.
- Review the information on Milestone Payment page and click Submit

Why was my invoice or service entry sheet been rejected and how can I correct it?

If a timesheet, expense sheet, or milestone payment request is rejected by the manager, you will receive a notification from the system. You will need to correct the issue and resubmit the transaction. Please contact Pontoon at beeline@mckesson.com if you need assistance.

How do I add other users as a McKesson supplier if I already have an account with Beeline?

- From the Home Page, navigate to Admin > User Administration
- Enter information for user and select the specific roles that user should have.
- A supplier administrator will be set up at time of onboarding and that person will be responsible for setting up other supplier administrators and users.

Supplier Setup with EFT



EFT Enrollment Request Process

Follow these steps to get setup to receive electronic payments:

1. Review the [EFT Enrollment Form](#) and have it signed by your controller or another executive in your company. A signature by anyone other than the appropriate signer will be rejected.
2. Email EFT Enrollment Form, and all other requested paperwork, to Beeline@McKesson.com.

NOTE: Avoid these common mistakes so your agreement does not get rejected:

- Signer of the EFT Enrollment Form must be a controller or other executive.
- Accounts receivable employees do not have authorization to sign.
- Sign the form with a digital signature. Wet ink signature will not be approved.

Important Payment Information:

Payments are issued once the net terms are met and will be in your bank account the following business day. Your net terms start from the invoiced date in Beeline. (This is the date that Beeline systematically processes all approved time and payments in a weekly invoice to McKesson, not the date that you submit the time or schedule the payment request).

If the due date falls on a weekend or holiday, the payment will issue the first business day after the weekend or holiday and in your account the following business day.

Payments are sent in a CTX file format that includes the remittance advice. You will need to check with your bank to see what options they have to translate the CTX file and forward to your AR for cash application. We do not send the remittance separately in any other format.

When you return the signed EFT agreement, you are agreeing to receive the remittance from your bank.

Required Documentation



- [Electronic Payment Agreement](#)
- [W-9 Form - Request for Taxpayer Identification Number and Certification](#)
- [Supplier Self-Certification of Size & Ownership](#)
- Copy of sample invoice that includes supplier remittance address
- Certificate of Insurance (COI) (see [example](#))

Certificate of Insurance (COI)



Obtain a Certificate of Insurance (COI) from your insurance provider and submit to McKesson.



Distribution/Pharma Products Supplier

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Issuing Broker's Name & Address	CONTACT NAME:		
	PHONE (A/C, No, Ext):	FAX (A/C, No):	
	E-MAIL ADDRESS:		
	INSURER(S) AFFORDING COVERAGE		NAIC #
INSURED The insured name should match the name from the STC	INSURER A:		
	INSURER B:		
	INSURER C:		
	INSURER D:		
	INSURER E:		
	INSURER F:		

COVERAGES CERTIFICATE NUMBER: SEA-003596643-05 REVISION NUMBER: 5

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL SUBR INSD WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	COMMERCIAL GENERAL LIABILITY					EACH OCCURRENCE \$ 3,000,000
	CLAIMS-MADE <input checked="" type="checkbox"/>					DAMAGE TO PREMISES (per occurrence) \$
	Contractual Liability <input checked="" type="checkbox"/>					MED EXP (per person) \$
						PERSONAL AND ADVERTISING INJURY \$ 3,000,000
	GEN'L AGGREGATE LIMIT APPL					GENERAL AGGREGATE \$ 10,000,000
	POLICY PROJECT <input type="checkbox"/>					AGG \$ Blank or Excluded
	OTHER:					
	AUTOMOBILE LIABILITY					COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000
	<input checked="" type="checkbox"/> ANY AUTO		Policy # Required			BODILY INJURY (Per person) \$
	<input type="checkbox"/> OWNED AUTOS ONLY					BODILY INJURY (Per accident) \$
	<input type="checkbox"/> HIRED AUTOS ONLY					PROPERTY DAMAGE (Per accident) \$
	<input type="checkbox"/> NON-OWNED AUTOS ONLY					SIR \$
	UMBRELLA LIAB <input checked="" type="checkbox"/>					EACH OCCURRENCE \$ 5,000,000
	EXCESS LIAB <input type="checkbox"/>		Policy # Required			AGGREGATE \$ 5,000,000
	DED <input type="checkbox"/> RETENTION \$					\$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY					PER STATUTE <input type="checkbox"/> OTHER <input type="checkbox"/>
	ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)	Y/N <input type="checkbox"/>	Policy # Required			E.L. EACH ACCIDENT \$ 1,000,000
	If yes, describe under DESCRIPTION OF OPERATIONS below					E.L. DISEASE - EA EMPLOYEE \$ 1,000,000
	Products Liability	X	Policy # Required			E.L. DISEASE - POLICY LIMIT \$ 1,000,000
	Crime, Employee Dishonesty & Computer Fraud		Policy # Required			EACH OCCURRENCE \$ 10,000,000
						AGGREGATE \$ 10,000,000
						\$ 1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

McKesson Corporation and its subsidiaries and affiliates are additional insured

Notes: Products Liability policy can be part of the General Liability Policy or a separate Products Liability policy as listed in the above example. The policy "types" must agree if the Primary Policy is combined with an Umbrella to satisfy the total limits.

CERTIFICATE HOLDER	CANCELLATION
McKesson Corporation and all its subsidiaries 6555 State Highway 161 Irving, TX 75039	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE of Marsh Risk & Insurance Services Issuing Broker Signature Required

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