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Coupa Reimbursement Instructions

Thank you for your participation in STEAM Ahead.

The MEDC partners with OpTech as a third-party payment vendor to manage reimbursements for all participating employers. To accomplish this, OpTech utilizes the Coupa Portal.

This document will cover the following processes:

- **PART I – COUPA REGISTRATION**
- **PART II – REIMBURSEMENT REQUEST**
- **PART III – VIEW REMAINING GRANT FUNDING IN COUPA PORTAL**

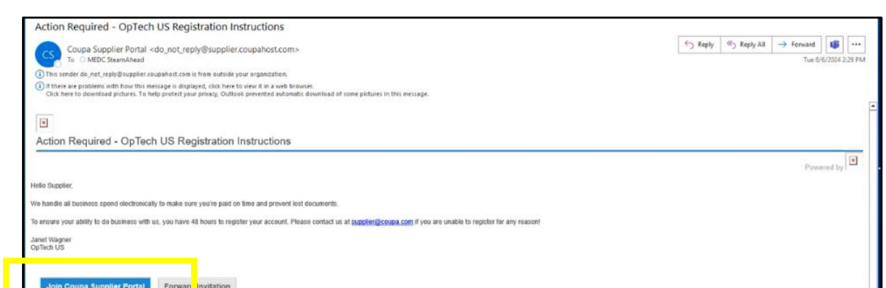
Please note – as part of your welcome e-mail from OpTech, you will receive a request to complete and return the attached ACH form, as well as to provide your company's W9. These are required documents for us to have on record for tax purposes. **If you do not return them to us, we will be unable to issue your refund until we receive them.**

PART I - COUPA REGISTRATION

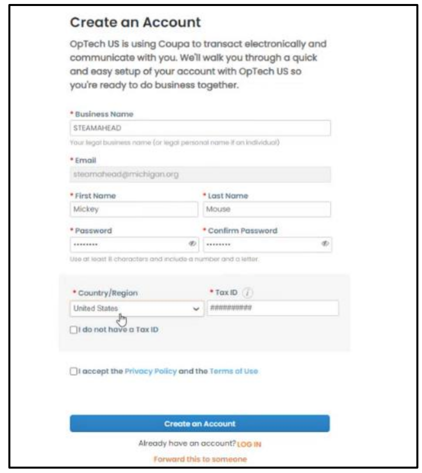
All employers who have had interns **approved** for STEAM Ahead will receive an e-mail from the Coupa Supplier Portal. These e-mails will be sent on the Monday **after** you have received your intern approval notice from the MEDC and will be sent on behalf of OpTech, who manages the supplier portal. The subject line will be "Action Required – OpTech US Registration Instructions." Please note, this e-mail contains a link that is only good for 48 hours. If the link should happen to expire prior to you getting a chance to open it, please contact the OpTech STEAM Ahead e-mail address (steamahead.pay@optechus.com).

You only need to register in Coupa **once.** If you have already registered, please jump to Part II.

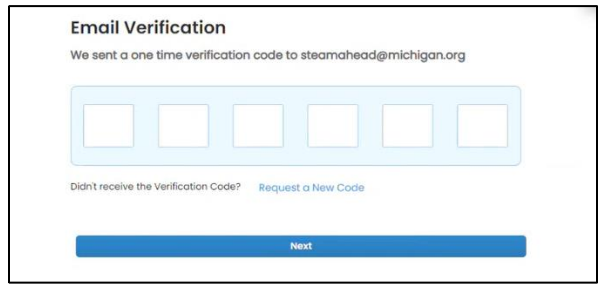
1) Open the e-mail and click on the button that reads "Join Coupa Supplier Portal".



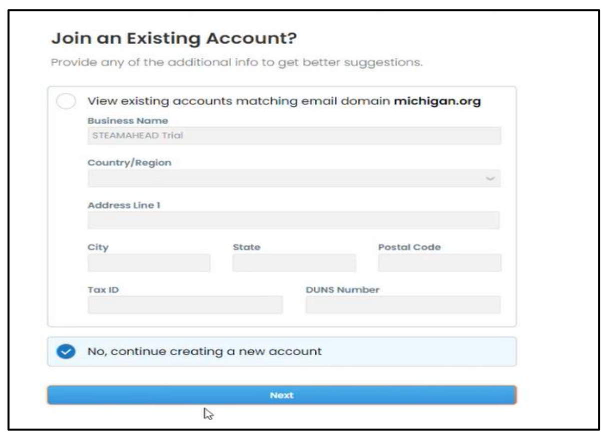
2) On the web page that pops up, fill in the fields, then click "Create an Account".
    a. Please note, if you already have an account, you can click the "log in" option instead.
    b. You are not required to enter a tax ID if you do not have one / do not wish to provide one. To skip this step, click the "do not have a Tax ID" box.



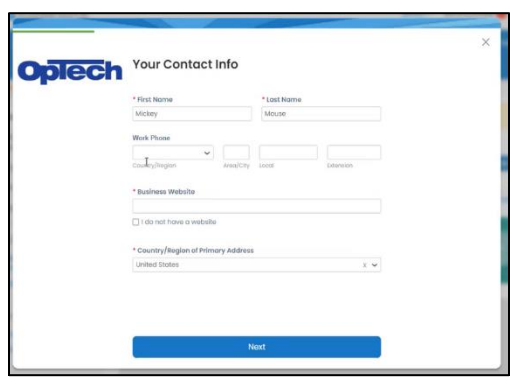
3) You will receive a one-time verification code through your e-mail, which you will then type in when prompted.



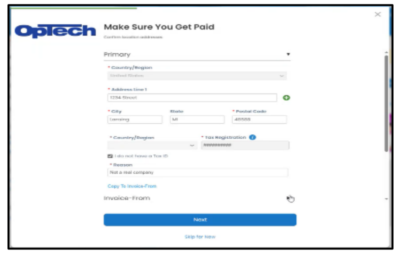
4) If you have a previous account, you will be prompted to select if you wish to continue to create a new account.
    a. If you wish to join up with a previous account, select that option and follow steps.



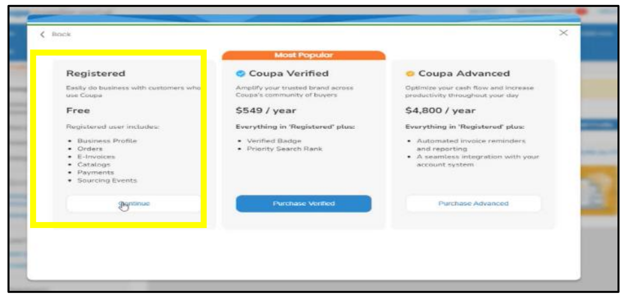
5) Continue filling in the relevant fields.
    a. When entering your work phone #, be sure to use a cell phone and not a landline, because your multifactor authentication will be tied to this phone #.
    b. Click "NEXT" once all fields are complete.



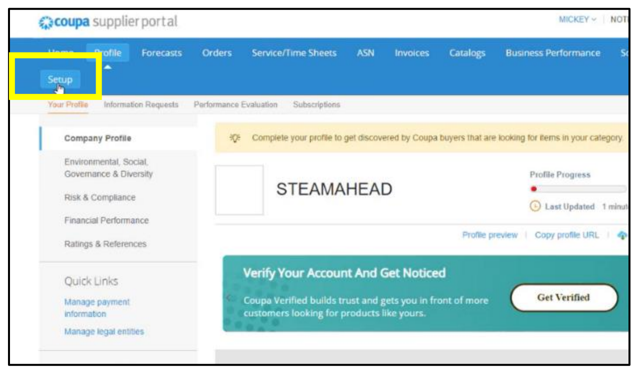
6) Complete all fields and click “NEXT”, or you can click “Skip for now” and fill this information in later.



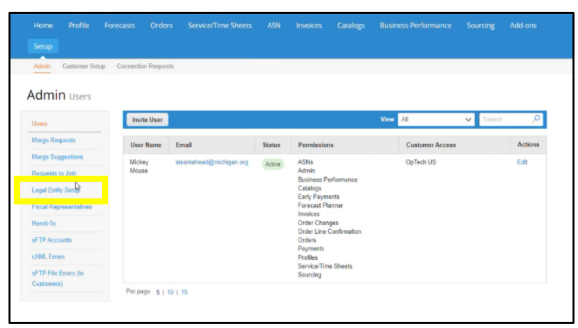
7) You may receive a prompt asking you to sign up for “Coupa Verified” - **this is not required.** You can simply click “Continue” under the “Registered” column to access the Coupa Supplier portal without accruing any charges or fees.



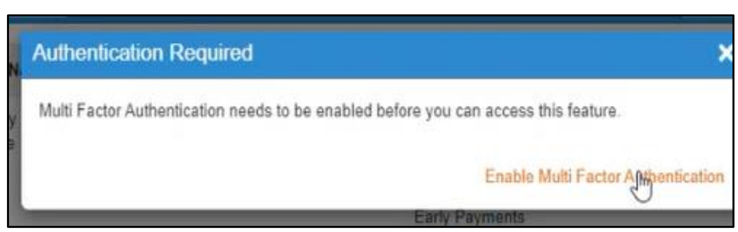
8) Once logged in, click on the link for “SET UP”.



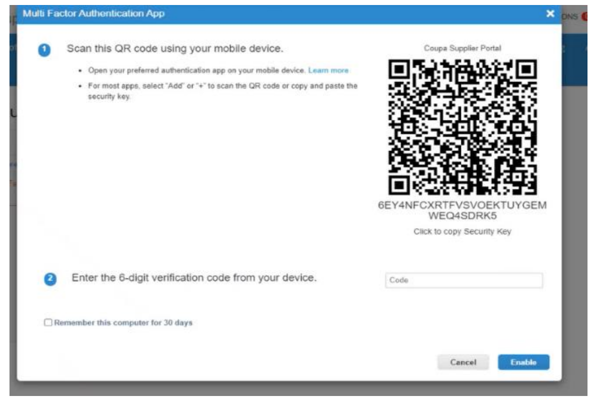
9) Click “Legal Entity Setup”.



10) Click “Enable Multifactor Authentication”.



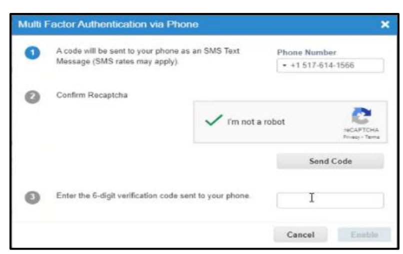
11) Have the Multi Factor Authentication App ready on your phone (Microsoft Authenticator app recommended; other authenticators might not work).
    a. Select “Add” or “+” to scan the QR code to attach the authenticator to this account.
    b. Once the accounts are linked, enter the 6-digit verification code provided on your device.
    c. Click “Enable”.
    d. You will see a pop-up screen that provides you with a list of security codes to recover your account. You have the option to download, copy, or print them, if desired, but it is not required.



12) Select “Via Text Message” as the default.

13) Enter the multifactor authentication code, then click “OK”.

14) Enter your phone number again, click the CAPTCHA box, then enter the 6-digit verification code sent to your phone, and click “Enable”.
    a. After you do this, it may provide another pop-up of security codes you can either print or download, but this is not required.



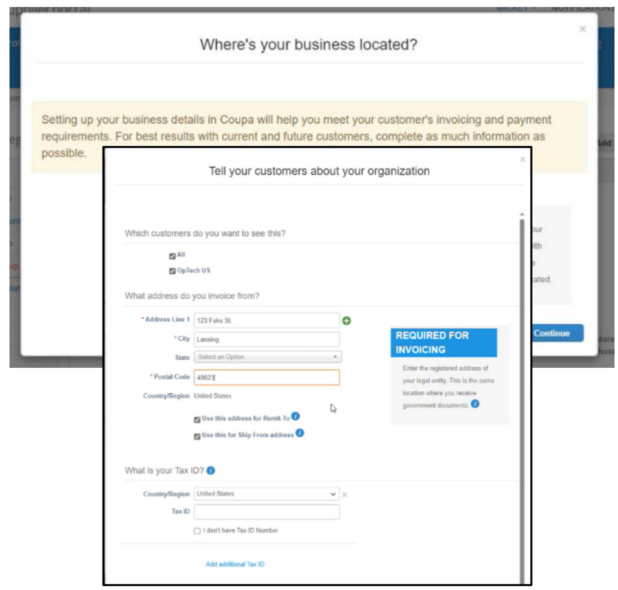
15) On the menu, return to "Setup."

16) Click "Legal Entity Setup" on the Admin Menu, then select "Add Legal Entity".

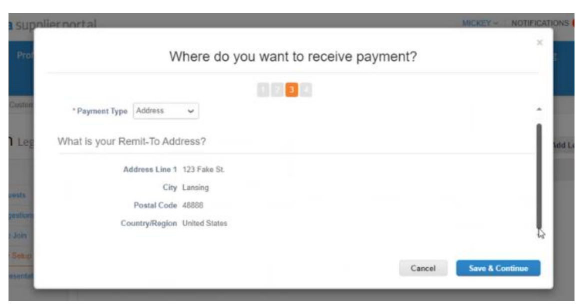
17) Enter company's legal name and the country/region, then click "Continue".

18) Complete all required fields. ==**Confirm that under the section reading "Which customers do you want to see this?" that OpTech is selected.**==

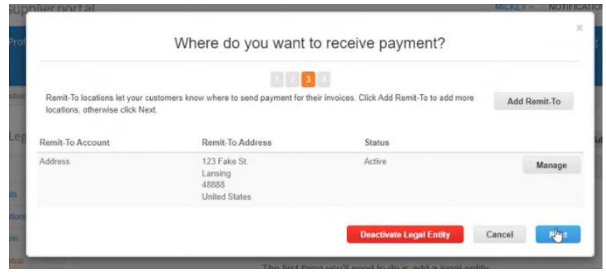
   a. If you do not have a tax ID, select the "I don't have a Tax ID Number" box.
   Note: *The Tax ID is not needed as you will not be receiving a 1099.*



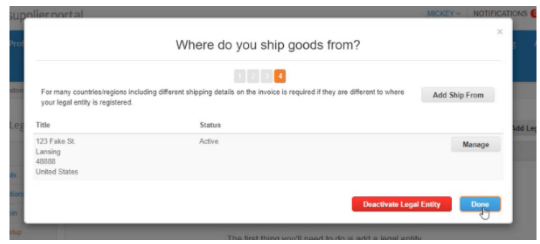
19) Verify the address is correct, and then click "Save & Continue".



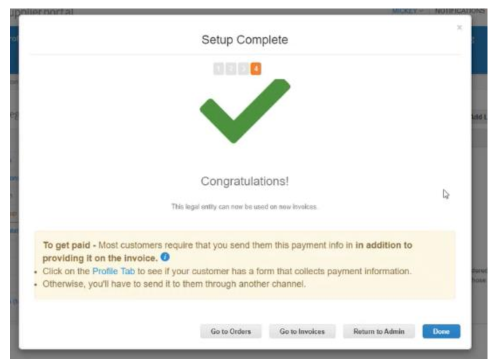
20) Confirm Remit To Address is accurate. If yes, click "Next".



21) If it asks you about where to ship goods from, click "Done" because we are not shipping anything.



22) Click "Done" when the Set Up Complete window pops up.



You will now be registered in Coupa and able to submit reimbursements. This is a one-time process, meaning you will not have to repeat it. If you have any difficulties registering your employer account in Coupa, please contact OpTech at steamahead.pay@optechus.com.

- Invoices should be submitted per the MEDC payment schedule to ensure prompt payment of funds.
- This training manual provides information for how to create invoices in the Coupa Portal and view submitted, approved invoices and grant balances.
- MEDC SteamAhead Email: steamahead@michigan.org – use to contact Crystal and Ava at MEDC.
- Optech MEDC Email: steamahead.pay@optechus.com – use to contact Optech - for any inquiries regarding invoices, the Coupa Portal or payments.

PART II - REIMBURSEMENT REQUEST PROCESS

Prior to the start of the intern(s) reimbursement period, OpTech will enter all approved interns in Coupa. This will include :

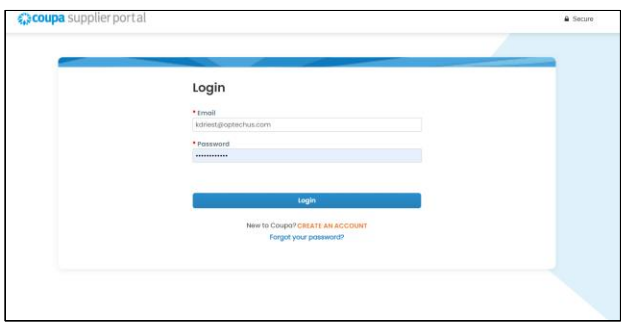
- The intern's first and last name
- Their total number of approved hours per semester
- Their total number of approved reimbursement per semester

As interns are registered by OpTech, Coupa will automatically generate a PO, which it will send to employers. ***There is nothing to do with this PO***. It is only to show your total reimbursement value available to you for that intern, for that semester.

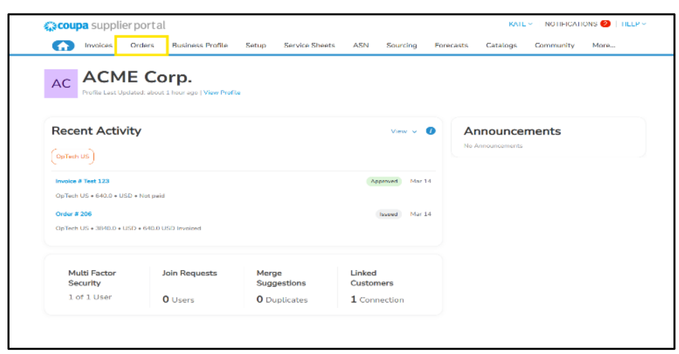
Employers are asked to be mindful of the payment schedule, which is located in the Employer Handbook.

Additionally, only the primary and secondary payroll contacts listed on the Intern Submission Form will be registered in Coupa, and will also be the only ones to receive communications regarding payment / reimbursement.

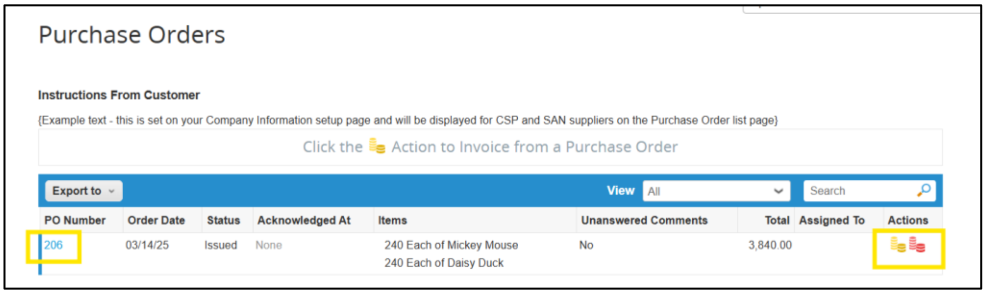
1) Log into Coupa



2) On the Coupa Portal home page, click "Orders" on the menu bar.

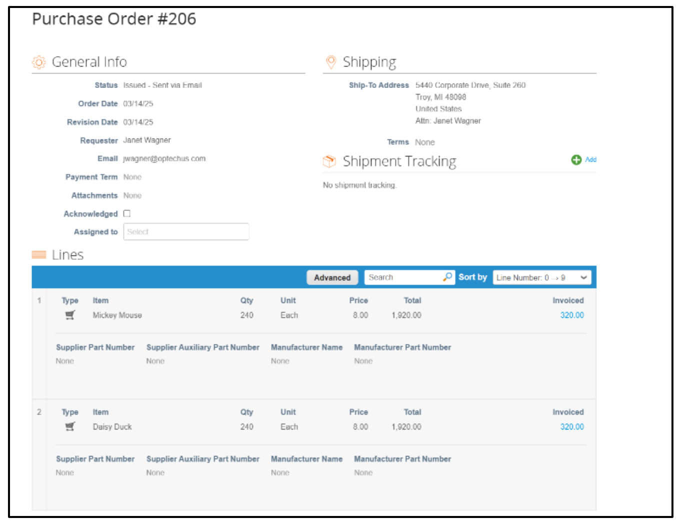


3) Click on either the PO Number or click the Gold Poker Chips (both will work).

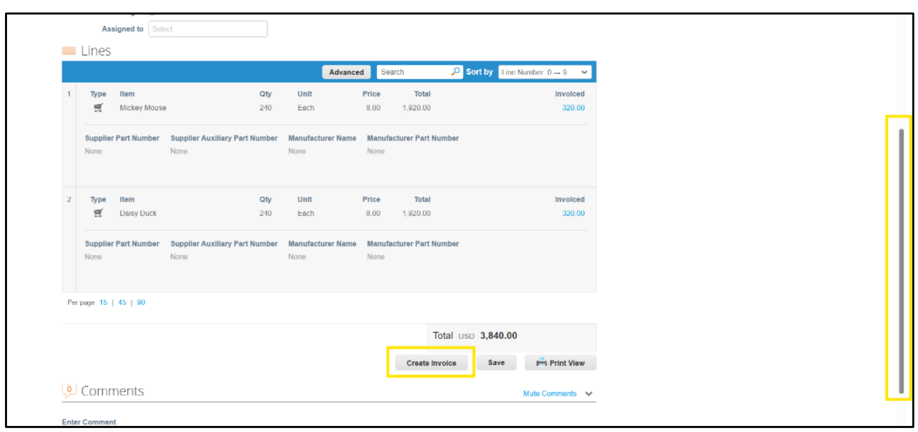


4) The Purchase Order screen is displayed and the purchase order line for each intern consists of:

   a. The name of the intern
   b. The total quantity of hours the intern may work based on the price
   c. The hourly price for reimbursement
   d. The total of the grant contribution (all displayed)
   e. **IMPORTANT -** If there is a PO line missing for an intern or the total amount for the intern is incorrect, please contact Optech by email: steamahead.pay@optechus.com to modify the purchase lines



5) To create an invoice, scroll down the webpage to select the “Create Invoice” button.



6) On the Create Invoice screen, you will be prompted to fill in the required fields:

   a. Invoice # - enter the invoice number using the first letter for the semester (W for Winter/Spring, S for Summer, F for Fall), followed by the year (e.g. 2025), followed by the 1 for the pay period

      i. E.g. W2025 1 for the first pay period of the Winter/Spring 2025 semester.

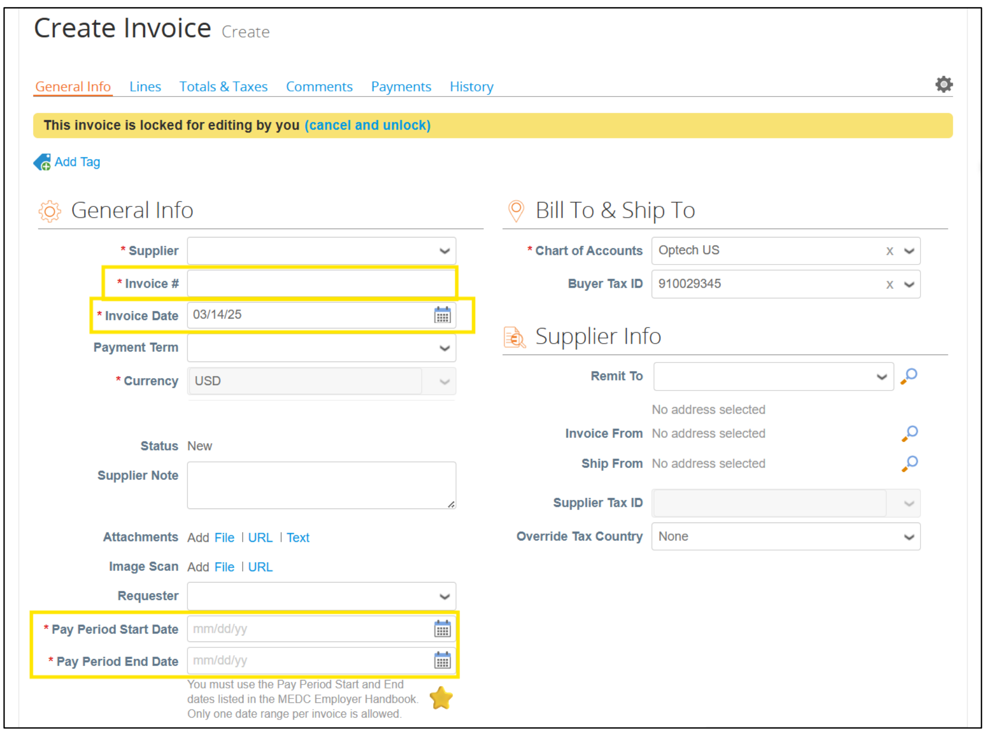
   b. Invoice Date – Date entering invoice in Coupa, any other date will not meet the "Net 10" terms

   c. Currency – auto populated by the Coupa system

   d. Pay Period Start Date – Refer to the ***MEDC Employer Handbook*** to select the Pay Period **start** date from the calendar drop-down (Bi-weekly; Sundays) that corresponds with the interns' hours for which you're requesting reimbursement

   e. Pay Period End Date: Refer to the ***MEDC Employer Handbook*** to select the Pay Period **end** date from the calendar drop-down (Bi-weekly; Saturdays) that corresponds with the interns' hours for which you're requesting reimbursement

*Note: Bulk invoices are *not* permitted – they must be separated by MEDC Pay Period*



7) Scroll down to view the Lines section of the invoice.

   a. Note the following:

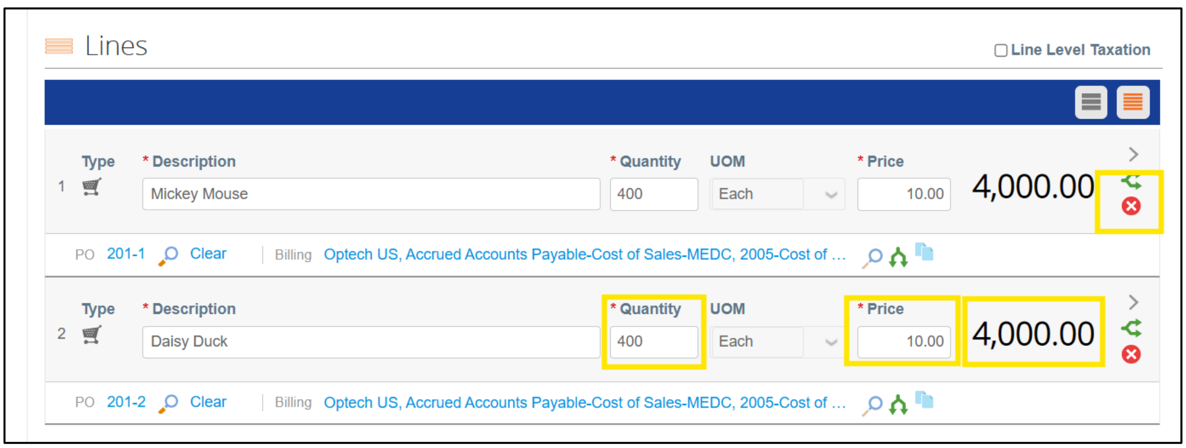
      i. Quantity – total # of hours the intern is authorized for throughout the semester (e.g. 400, etc.) This field is **pre-populated.**

      ii. Price (the reimbursable hourly wage – e.g. if an intern is going to earn $20.00 an hour, you can receive up to $10.00 back in the 1:1 wage match, so the price for the intern would read 10.00)

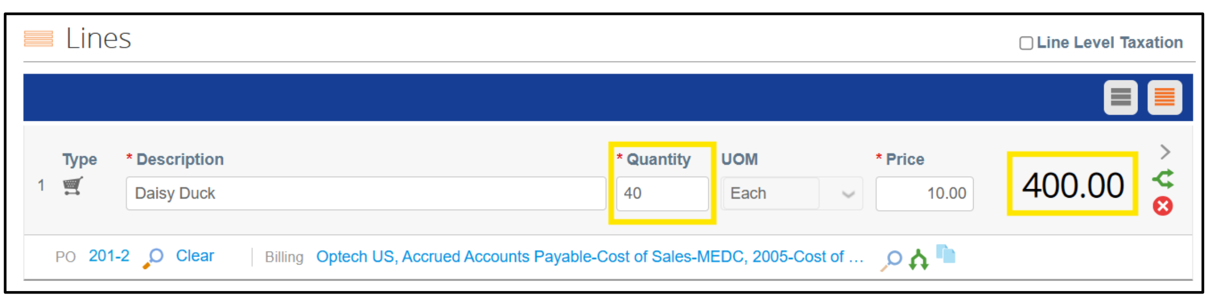
      iii. Total amount of the line for each intern (the total authorized reimbursement amount for the intern, per semester).
      Note: The Total Amount field is configured to accept a specific number of decimal points.

   b. To begin, click on the "QTY" field and type in the # of hours worked during that pay period (e.g if an intern worked 40 hours during the pay period, type 40). Please note, the field is **pre-populated** with the total remaining # of hours the intern is authorized for the semester. **You must delete this pre-populated number and type in the # of hours worked during that pay period.**

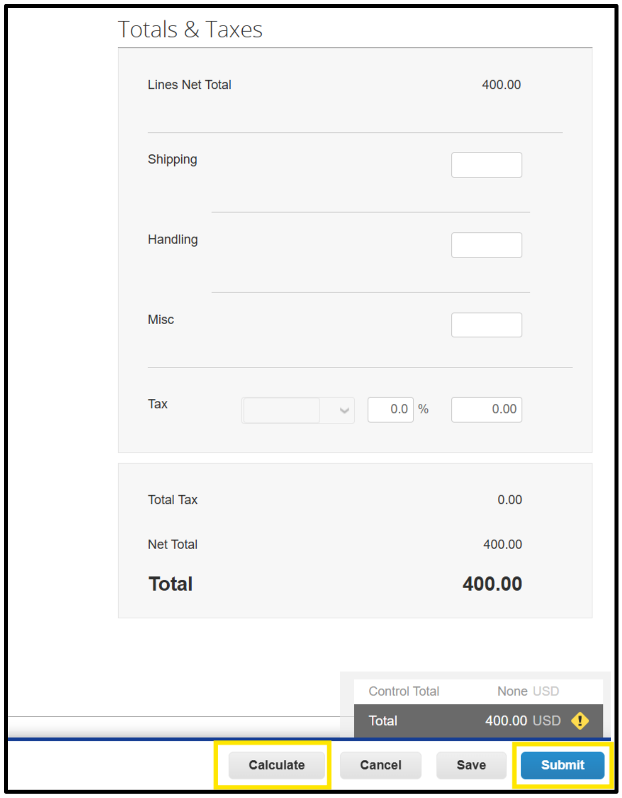
   c. If there is an intern who did *not* work during a pay period, click the red "X" next to that intern's total.



8) Notice when you enter the correct # of hours worked during the pay period, you will see the line amount for the invoice change (in this example, it went from 4000.00 to 400.00)



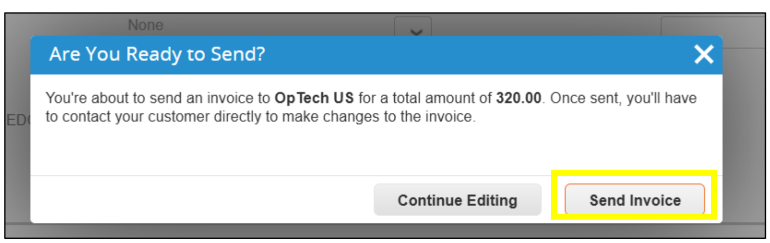
9) Scroll down and click the “Calculate” button to ensure the invoice total is the correct amount that you wish to submit. Once you confirm the total is correct, click “Submit."



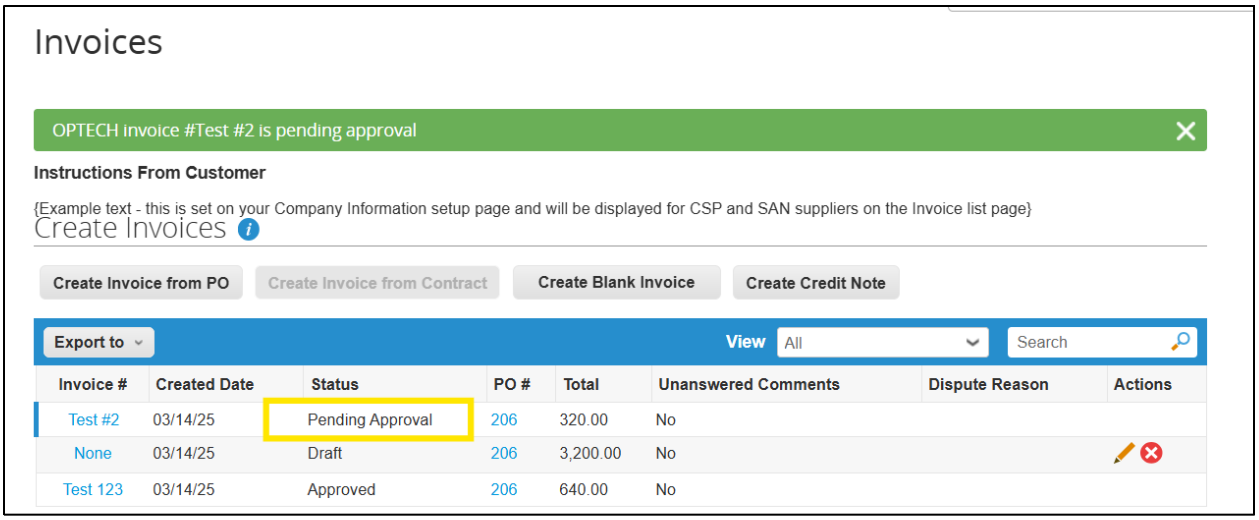
10) A notification box will appear, stating that you are going to submit an invoice to OpTech with the total amount of the invoice.

a. If the total is incorrect, click “Continue Editing” to correct and recalculate the invoice.

b. If the invoice and the total is correct, click “Send Invoice”.



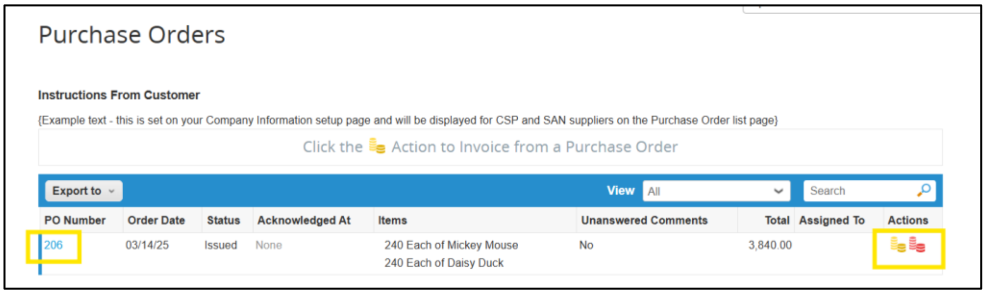
11) Once submitted, you will see a list of all invoices (pending, approved, disputed, etc.). The invoice you submitted will be listed as “Pending Approval”.
    a. Once approved, the status will read “Approved”.
    b. If disputed, the invoice will say “disputed” along with a comment explaining why it was disputed and instructions on how to resolve it. Please correct your errors and resubmit the invoices before the Invoicing Deadline so as not to delay your reimbursement.



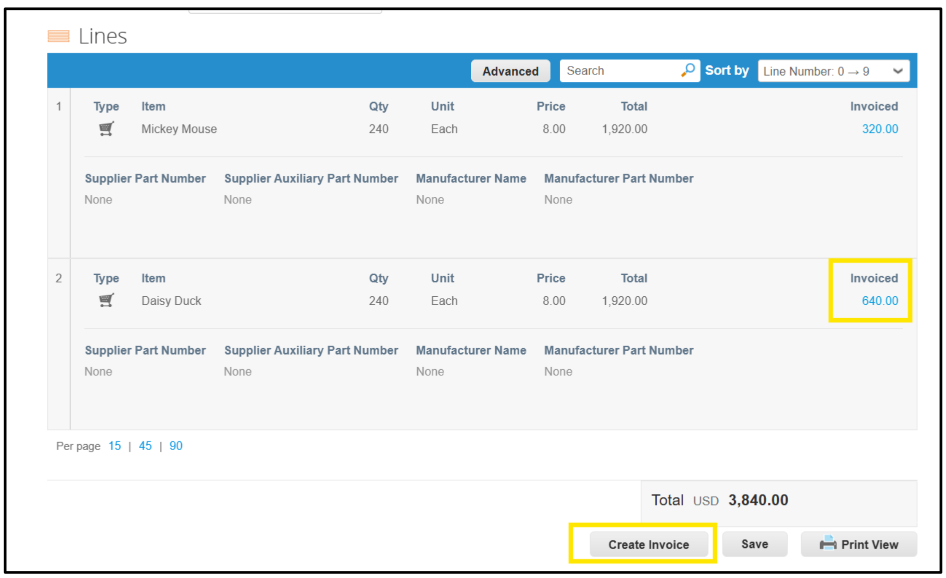
PART III – VIEW REMAINING GRANT FUNDING IN COUPA PORTAL

To view the remaining balance of grant funding per intern, a new invoice is created, and the balance of the grant funding is available to view.

1) Navigate back to the Purchase Order in the Coupa Portal, and click back on the PO # or click on the Gold Poker Chips.



2) The screen will display the amount invoiced against the purchase order line (e.g. Showing here that $640 has been invoiced). Click "Create Invoice".



3) The Lines section of the Invoice displays in the Qty field the remaining hours and the Balance displays the total dollars of the grant funding remaining that may be used.

Note: Future invoices will continue to reduce the hours available in the Qty field and the Balance total for each Purchase Order line. If you submit an invoice for more hours than are availabe or the total dollars remaining, you will receive notification there are not enough hours or availabe funds for the invoice. Optech will reject the invoices.

Example: an Intern worked 15 hours and the Purchase Order line displays a quantity total of 3 hours in the QTY field. Only 3 hours may be used for the invoice.