

# iDOT Manual: Supplier



# IDOT MANUAL: SUPPLIER

## Purpose of iDOT Manual

The manual simplifies Supplier onboarding and ensures users understand essential system components.

## Role of Supplier

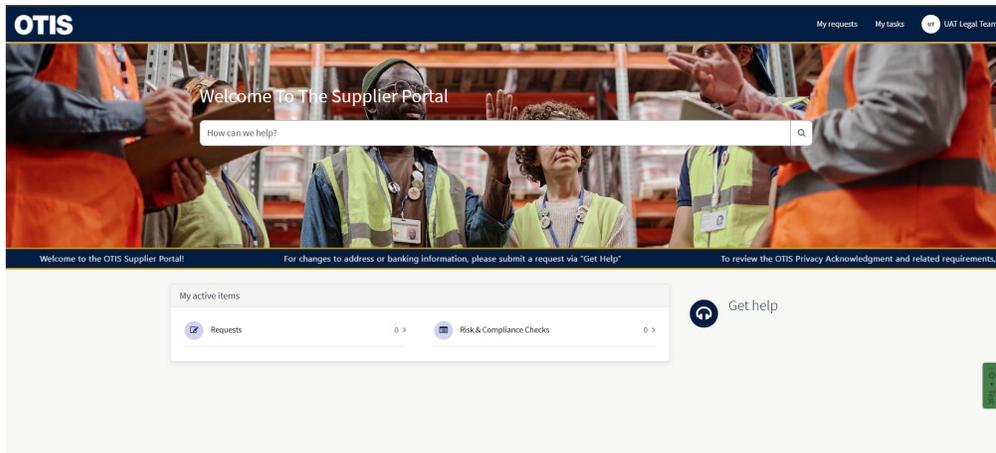
Supplier is requested to complete the Supplier onboarding along with All the associated Risk Assessments. iDOT Vendor Portal also allows the Supplier to request for Bank Details Update and Address Update

## Professional Usage Guidelines

Emphasizes record accuracy, information validation, and adherence to compliance protocols.

## Standardized Approach Benefits

Standardization across BU teams reduces miscommunication and improves operational efficiency.



# IDOT MANUAL: SUPPLIER

**Otis looks forward to working with you!** As part of our onboarding process, we utilize two digital tools, iDOT and ProcessUnity, to gain a better understanding of your company.

On the righthand side is an overview of the process Otis uses to add suppliers to our purchase order and payment processing systems.

Following, are **instructions on how to use the iDOT system.**

If you have questions or need assistance at any point during this process, you can **contact the Vendor Onboarding & Maintenance Team at [OtisSupplierDataAmericas@otis.com](mailto:OtisSupplierDataAmericas@otis.com) or your Otis representative.**

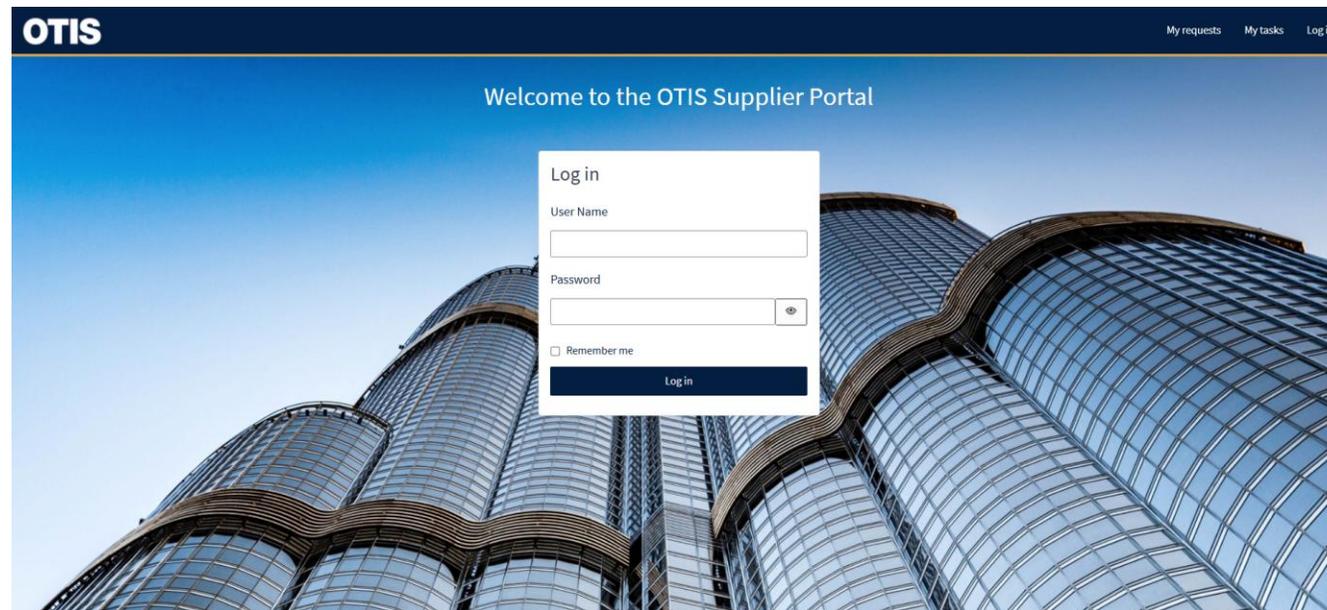
	Supplier Onboarding Process Step	Description	Digital Tool
1	<b>Request Initiated</b>	An Otis colleague (Business Requestor) submits a request to add a supplier to the Otis purchasing systems.	iDOT
2	<b>Request Approved to Proceed</b>	An Otis Supply Chain Category Manager reviews and approves the request.	iDOT
3	<b>Supplier Provides Information (You are here)</b>	The supplier provides the initial foundational information.	iDOT
4	<b>Information Reviewed</b>	Otis colleagues review the information.	iDOT
5	<b>Supplier Provides Additional Information</b>	In some instances, Otis colleagues will need additional information regarding the supplier's cybersecurity &/or quality programs.	ProcessUnity
6	<b>Additional Information Reviewed</b>	Otis colleagues review the additional information provided.	ProcessUnity
7	<b>Supplier Provides Clarification</b>	In some instances, Otis colleagues will need clarification on the additional information provided by the supplier.	ProcessUnity
8	<b>Supplier Added to Otis purchase order systems</b>	After approval by the required Otis colleagues, the supplier will be added to Otis' purchase order processing systems. <b>The supplier should not begin any work until an authorized purchase order has been issued.</b>	Otis purchasing systems
	<b>9. Bank Account Verification</b>	Authorized Otis personnel may contact the supplier to confirm information regarding banking details and payment methods.	Email or phone

# LOGIN TO IDOT VENDOR PORTAL

## Secure Login Process

User can login using UserID and Password which are shared to Supplier via Email.

**Requestor Instance URL:** [https://genpactotitest.service-now.com/vp?id=vp\\_login](https://genpactotitest.service-now.com/vp?id=vp_login)



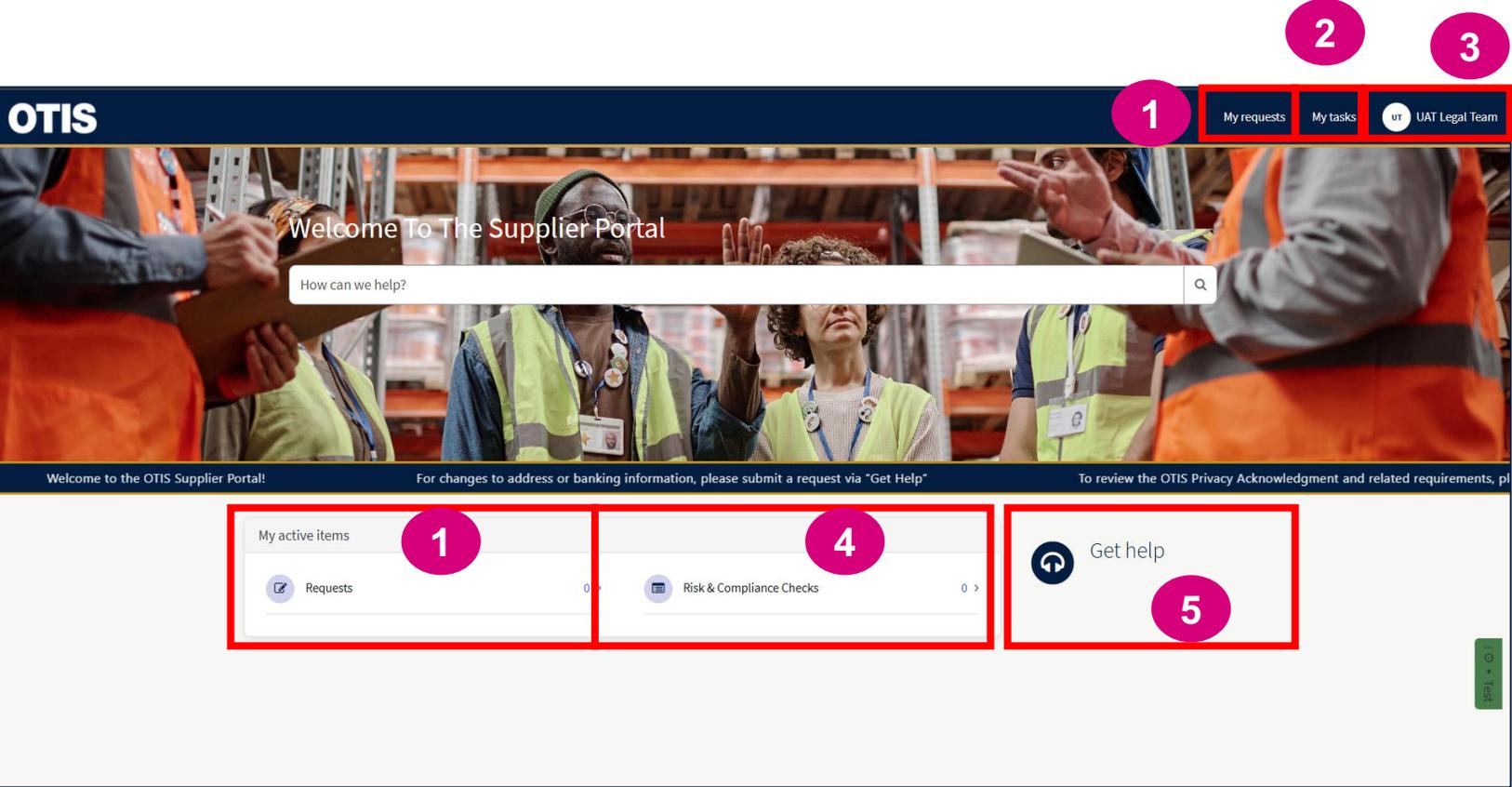
## Organizational Security Goals

Secure login supports supplier management by protecting sensitive data and aligning with compliance standards.

# PORTAL NAVIGATION

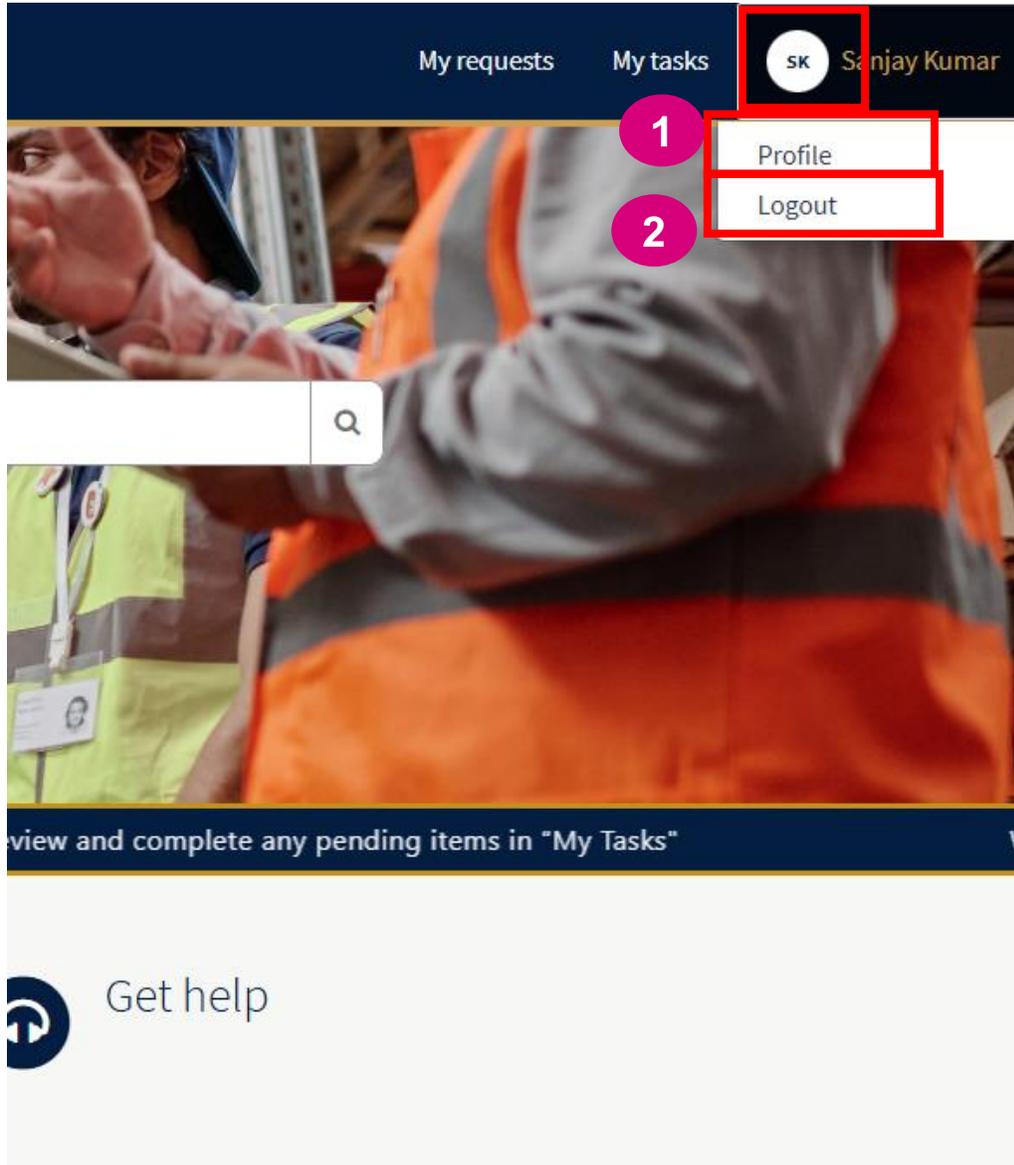
- **Portal Layout and Structure**
  - The portal features top-level menus and an interface hierarchy to organize information and tools efficiently.
- **Global Navigation Elements**
  - Key navigation components include home dashboard, quick action panels, search bar, and profile options for easy access.
- **Best Navigation Practices**
  - Bookmarking pages, monitoring alerts, and reviewing requests help streamline onboarding and maintain consistency.

# IDOT SUPPLIER PORTAL - HOME SCREEN



1. Select **My Requests** to view all previously submitted requests and saved drafts.
2. Select **My Tasks** to view all pending tasks related to vendor onboarding or updates.
3. Select the **Profile** icon to update system settings and User Details
4. Select **Risk and Compliance Checks** to complete any pending Risk Assessment which is Crucial for supplier Onboarding and Update.
5. Select **Get Help** to request for Address or Bank Information Update

# IDOT SUPPLIER PORTAL - MY PROFILE



1. Select "Profile" to update your personal information, language preferences, time zone,
2. Select "Logout" to securely sign out of your account.

# IDOT SUPPLIER PORTAL - MY REQUESTS

The screenshot shows the 'My Requests' page in the IDOT Supplier Portal. The page has a dark blue header with the 'OTIS' logo on the left and a user profile on the right. The user profile includes a red box with a '1' callout, containing the text 'My requests' and 'My asks', and a circular profile picture with the initials 'SK' and the name 'Sanjay'. Below the header, there is a breadcrumb trail 'Home > Requests'. The main content area features a 'My requests' section with two tabs: 'Submitted requests' (highlighted with a red box and a '2' callout) and 'Drafts' (highlighted with a red box and a '3' callout). Below the tabs is a 'View' dropdown menu set to 'Open requests' (highlighted with a red box and a '4' callout) and a search input field labeled 'Search open requests'. The main content is a table with the following columns: 'Request', 'State', and 'Updated'. The table contains eight rows of request data.

Request	State	Updated
VENC0001543 New Vendor Onboarding Request - Vendor_02_05_2026	On-Hold	7d ago
VENC0001542 Vendor Identification - Sanjay Kumar	Work in Progress	9d ago
VENC0001330 New Vendor Onboarding Request - Vendor For Rekha	On-Hold	about a month ago
VENC0001534 Address Update Request - Kathy Vendor 2-05_12_2025	Work in Progress	2mo ago
VENC0001526 Vendor Identification - Sanjay Kumar	Work in Progress	2mo ago
VENC0001505 New Vendor Onboarding Request - IDOT Support Team	Work in Progress	2mo ago
VENC0001461 New Vendor Onboarding Request - Blue Ridge Industrial Supplies LLC	On-Hold	2mo ago
VENC0001478	On-Hold	3mo ago

1. Select **My Requests** in the top-left section of the screen to view all requests and drafts.
2. Select the **Submitted Requests** tab to view all submitted vendor requests. Each request displays the **Request ID, Request Type, and Vendor Name**.
3. Select the **Drafts** tab to view unsubmitted requests. Only requests saved as drafts will appear in this tab.
4. Use **filters** to display Open or Closed requests or use the **Search function** to locate specific requests.

# IDOT SUPPLIER PORTAL - MY PROFILE SETTINGS

Home > User Profile

Search

My Support Profile

Vendor Contact\_22\_01\_2026

Title (Empty)

Upload Picture

About

First name

Last name  
Vendor\_Contact\_22\_01\_2026

Email  
vc@january.com

Business phone

Mobile phone  
8209919600

Notification  
Enable

Fields marked 1, 2, and 3 are non-mandatory. You may bypass these sections at your discretion.

1. Select the Upload **Picture icon** to add a profile picture to your account. (optional)
2. Select the **Title** field (below your account name) to add personal details.(optional)
3. Select fields from About Section to update First Name, Last Name, Phone Number, Email etc (optional)

# IDOT SUPPLIER PORTAL - MY PROFILE SETTINGS

Home > User Profile Search

Business phone

Mobile phone  
8209919600

Notification  
Enable

User ID  
vc@january.com

**4** User preferences

Accessibility enabled  
 Off

Language  
English

[Configure Multi-Factor Authentication](#)

**5** Security

Password  
Change Password

**4. Select Language as per your preference:** German, English, Spanish, France, Italian, Portuguese, Japanese, Chinese, Korean.

**5. Select **Change Password**** to reset your password at any point of time

# IDOT SUPPLIER PORTAL - MY TASKS

My requests My tasks

Home > Risk & Compliance Checks

Additional Vendor Information Form

Vendor\_22\_01\_2026  
VENC0001536

Risk & Compliance Checks

Engagement of Activities - Vendor 22\_01\_2026  
VENC0001536 • Due in 14d

Sustainability Risk Assessment - Vendor 22\_01\_2026  
VENC0001536 • Due in 14d

Code of Conduct - Vendor 22\_01\_2026  
VENC0001536 • Due in 14d

- 1. Click on My Tasks:**  
The Supplier is navigated to My Tasks Page where they are able to view all pending Forms/ Risk Assessment that are crucial to continue the process of Supplier onboarding/Update.
- 2. Supplier Onboarding Form:**  
The Supplier is requested to continue the form submitted by BU details like Bank Details, Address Verification, Sustainability Questions are answered by Supplier in this section.
- 3. Risk and Compliance Checks:**  
These are the risks assessments triggered to Supplier based on the services he intends to provide to OTIS, the Supplier is requested to answer all the Risk assessment with Honesty to avoid any delays during internal audit.

**Supplier Onboarding:  
Additional Supplier  
Information Questions**



# Supplier Onboarding Information

The next few slides provide an overview of the initial supplier onboarding questionnaire.

## Sections

- **Acknowledgement of the OTIS Privacy Policy**
- **Bank and Payment Information**
- **Addresses**
- **Company information**
- **Sustainability Information**

Payment Information

\*Supplier's Tax ID/Company Registration Number/TIN ⓘ **More information** Additional Supplier's Tax ID/Company Registration Number/TIN

123456765434567

\*Currency Code ⓘ USD x ▾ Supplier Duns # ⓘ 987654334

Bank Information

\*Bank Name

\*Bank Account Number

International Bank Account Number (IBAN) ⓘ

Bank Transit Number/Routing Number/ABA ⓘ

SWIFT/BIC Code ⓘ

Bank Country Code -- None -- ▾

When you log in to iDOT, you will find **additional help guidance** by clicking on the question mark (?) next to each question.

# Supplier Onboarding Information

Please complete all items in the My Requests and My Tasks sections. You will find tabs entitled Supplier Information and Risks & Compliance where information is required. Once all sections are completed, the information will be routed to the appropriate Otis contact for review and they will let you know if they have additional questions. If you would like to check the status of your onboarding or have any questions, please contact the Otis Supplier Onboarding Team at [OtisSupplierData@Otis.com](mailto:OtisSupplierData@Otis.com) or your Supply Chain Representative. Thank you for your prompt attention.

\* Indicates required

**Privacy Acknowledgment**

\* I acknowledge that I received and reviewed the Otis Privacy Notice (<https://www.otis.com/en/us/privacy-policy>)

**Supplier Onboarded**

\*Workflow ID:

\*Legal Name:

**Payment Information**

\*Supplier's Tax ID/Company Registration Number/TIN:

Additional Supplier's Tax ID/Company Registration Number/TIN:

\*Currency Code:

Supplier Duns #:

**Bank Information**

\*Bank Name:

\*Bank Account Number:

International Bank Account Number (IBAN):

Bank Transit Number/Routing Number/ABA:

SWIFT/BIC Code:

Bank Country Code:

**Required information**

I acknowledge that I received and reviewed the Otis Privacy Notice (<https://www.otis.com/en/us/privacy-policy>)

Bank Name

Bank Account Number

What is your company formation jurisdiction?

Is your company C-TPAT certified or a member of an equivalent cargo security program? (ex. Customs Trade Partnership Against Terrorism (C-TPAT), Partners in Protection (PIP), Authorized Economic Operator (AEO), etc.)

## Sections

- 1. Privacy Acknowledgment:** Review the OTIS Privacy Policy and select the **acknowledgment checkbox** to proceed.
- 2. Payment Information:** Enter the payment instrument, tax ID, any additional tax IDs, currency code, and DUNS number if applicable.
- 3. Bank Information:** Provide the banking details, including bank name, account number, IBAN, SWIFT code, bank transit number, and bank country code.

# Supplier Onboarding Information

Home > IDOT > Supplier Management > Supplier Onboarding Form

Search Catalog

**Please provide the legal location of your company. This address should match the address on your tax forms.**

**Vendor Address**

Address Line Details (Line 1)

Address Line Details (Line 2)

Address Line Details (Line 3)

Address Line Details (Line 4)

City

State Code

Country/Territory/Area

ZIP Code

County Code

**The Remit to address is the mailing location where you would like to receive payments. This can be different from the main office or shipping address. If using electronic forms of payment, Remit to should be the address associated with the electronic payment information.**

**Remit To Address**

Copy from Main Address

Address Line 1

Address Line 2

Address Line 3

Address Line 4

Save as Draft

Submit

Required information

- I acknowledge that I received and reviewed the Otis Privacy Notice (<https://www.otis.com/en/us/privacy-policy>)
- Currency Code
- Bank Name
- Bank Account Number
- What is your company formation jurisdiction?

iDOT allows the supplier to capture the following Supplier Address:

- 1. Vendor Address:** Enter the vendor’s country, state, city, postal code, and full address; include additional address lines and county code if required.
- 2. Remit To Address:** The address where the supplier would like to receive OTIS Invoice
- 3. Manufacturing Address:** If your company manufactures parts or components for Otis that are used in the elevator, escalator, moving walkway, or similar, please provide the address for each location where these goods for Otis are produced, assembled, or processed. For each location, provide the full address including street name, building number, city, state/province, postal code, and country. If multiple locations exist, please list each one separately. If you have locations that are not used for Otis goods content, please do not include them.

# Supplier Onboarding Information

**Additional Supplier Company Information**

\*What is your company formation jurisdiction? ?

\*Is your company traded on a public stock market? (For example, NYSE, NASDAQ, SSE, TSE, LSE)

\*Please confirm your licenses and permits to conduct work are current. We recognize that some permits are specific to a job, for instance, a building permit. You can exclude these from your response to this statement.

\*Please confirm you company is Active and in Good Standing withing the jurisdictions where you do business? ?

\*Is your company C-TPAT certified or a member of an equivalent cargo security program? (ex. Customs Trade Partnership Against Terrorism (C-TPAT), Partners in Protection (PIP), Authorized Economic Operator (AEO), etc.)

\*Please confirm your company is not in bankruptcy, insolvent, in receivership, or considered as high financial risk as assessed by your creditors or other third parties like DnB, RapidRatings, or similar.

**Sustainability Questions**

\*Do you measure your water usage?

\*Does your Company utilize metals like Tin, Tantalum, Tungsten, or Gold for the functionality of the product(s) manufactured for OTIS?

\*Does your Company make use of Natural Rubber?

\*Does your Company measure the Scope 1, 2, or 3 greenhouse gas emissions?

**Corporate Social Responsibility Score**

\*Have you participated in any of these assessments withing last 24 months?

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**Required information**

I acknowledge that I received and reviewed the Otis Privacy Notice (<https://www.otis.com/en/us/privacy-policy>)

Currency Code

Bank Name

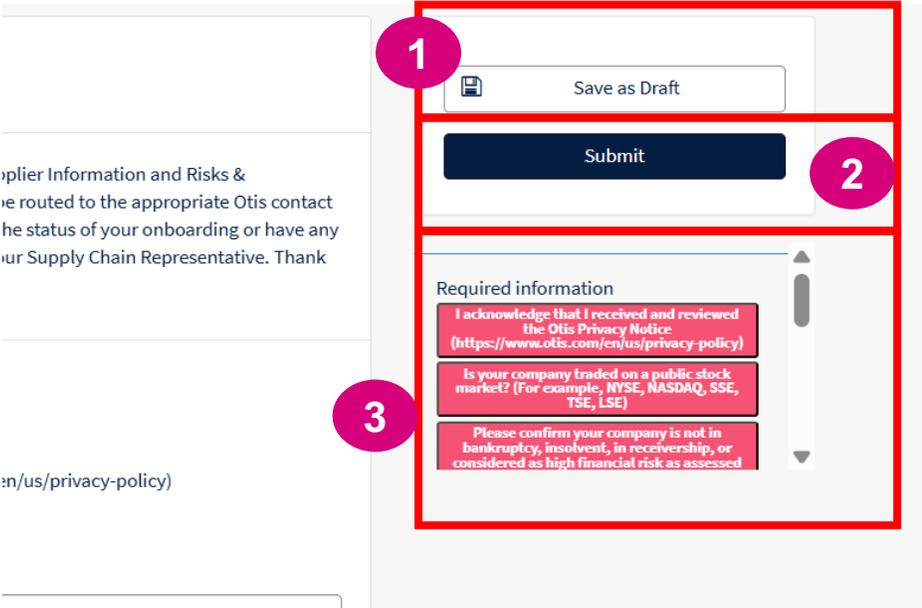
Bank Account Number

What is your company formation jurisdiction?

Sections:

1. **Additional Supplier Company Information:** Provide company formation jurisdiction, confirm stock-market status, and acknowledge the company’s good standing, licensing, and financial stability.
2. **Sustainability Questions:** Respond to sustainability-related questions, including greenhouse gas measurement, use of specific metals, natural vs. synthetic rubber usage, and the existence of responsible-sourcing policies.
3. **Corporate Social Responsibility Score:** The Supplier can select any CSR Certification from the Dropdown and attach the evidence of the rating.

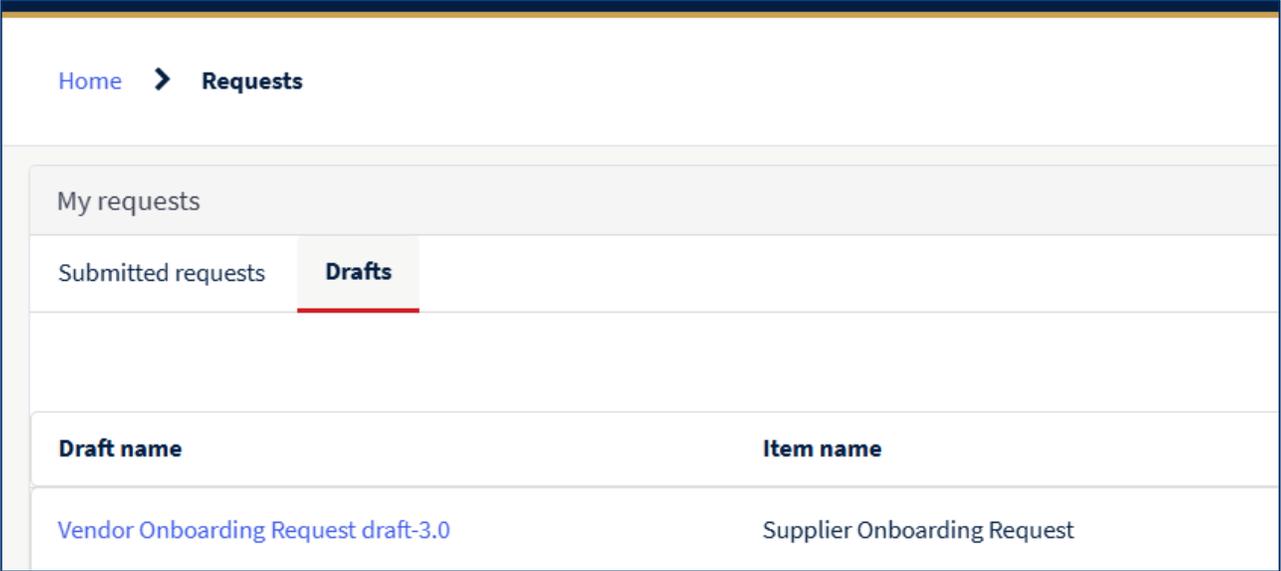
# Supplier Onboarding Information



3. **Required Information:** This Section helps the user understand and quickly navigate to fields which are mandatory are a response is required from supplier.

### Sections:

- 1. **Save As Draft:** This feature allows users to save the form with partial information. Once saved, the Supplier Onboarding Form can be resumed at any time by navigating to the **My Request > Draft** section. This ensures suppliers can complete the process at their own pace.
- 2. **Submit Button:** Once the user has successfully completed the supplier onboarding Form, the user can click Submit Button to submit information into System. Post Submission user would be redirected to the submitted form view.



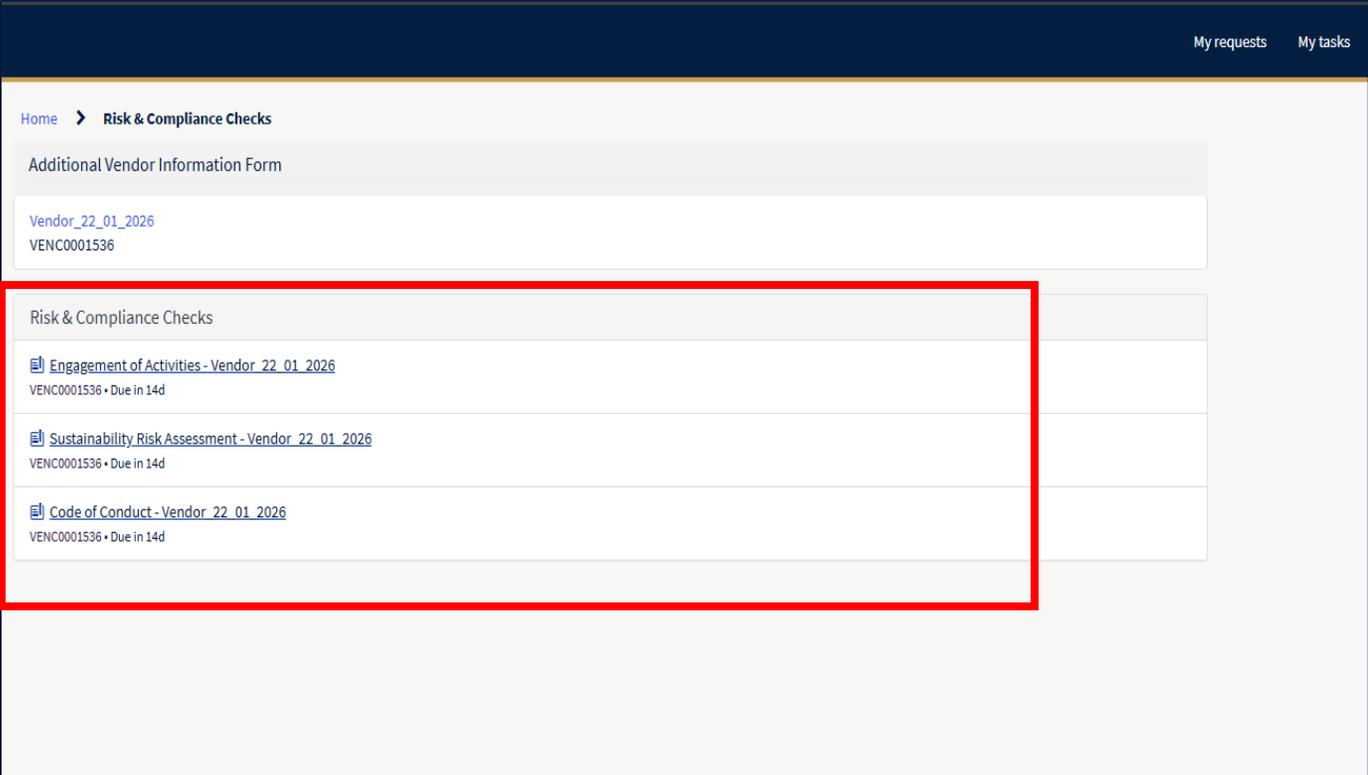
A man in a dark suit stands with his back to the camera inside a futuristic, cylindrical glass elevator. The elevator has a glowing circular light fixture at the top and a glowing base. Outside the elevator, a modern city skyline with various skyscrapers is visible under a clear sky. The scene is set in a high-rise building with a glass railing and a polished floor. The overall aesthetic is clean, modern, and futuristic.

# Supplier Onboarding: Risk & Compliance Checks

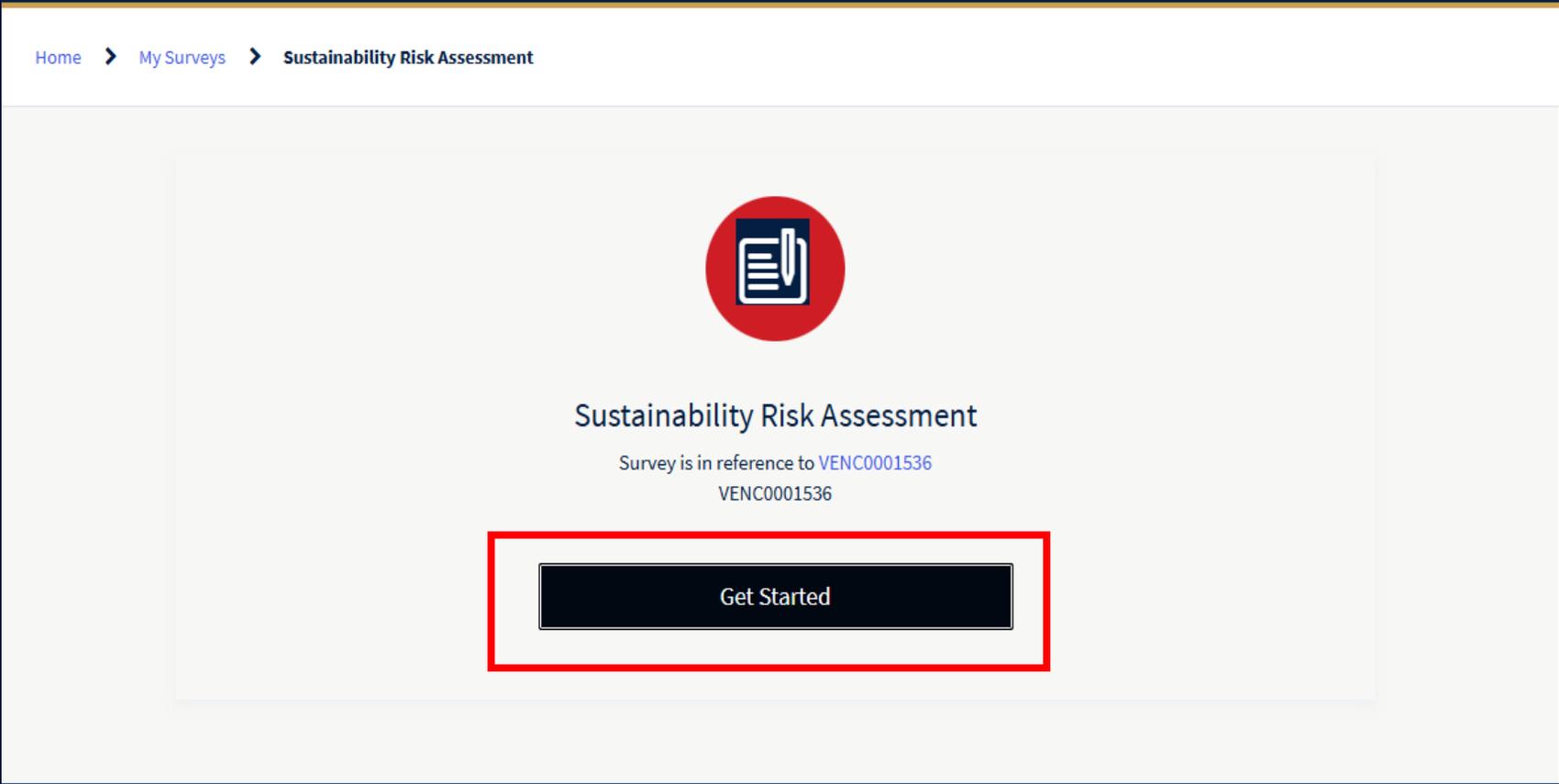
# Risk & Compliance Questionnaires

The question sets you will see in the section titled “Risk & Compliance Checks” will vary based on the type of goods or services you will be providing to Otis. The topics are related to **Safety, Ethics, and Sustainability**.

The following slides show an overview of all the question sets. Please keep in mind these may not all be applicable to you.



# Get Started with Risk Assessments



Once User selects any Risk Assessment the following page is displayed to the supplier where the supplier CAN PROCEED to submit the risk assessments by clicking **Get Started**

# Code of Conduct

The screenshot shows a web form titled "Code of Conduct" with a breadcrumb trail: Home > My Surveys > Code of Conduct. The date "August 13, 2024" is displayed at the top. A pink circle with the number "1" points to a "Show less" link. Below this is a radio button selection area with two options: "Do NOT Agree" (selected) and "Agree". A pink circle with the number "2" points to the text: "\*I acknowledge that I have read the Code of Conduct and agree to abide by its terms." Below this is a text input field for "Comments" with a pink circle "3" pointing to it. At the bottom left is an "Attachment" section with an "Upload" button. At the bottom right are "Cancel", "Save", and "Submit" buttons. A "1/1" page indicator is also present.

At Otis, our Absolutes - Safety, Ethics, and Quality - define how we think, how we make decisions, and how we take action.

Our suppliers are critical to our success. To provide superior Otis products and services in a responsible manner, we require you, our suppliers, and everyone you work with, to share our commitment to meeting these Absolutes.

1. **Code of Conduct:** Expand and review the OTIS Supplier Code of Conduct in full before proceeding.
2. **Acknowledgment:** Confirm that you have read, understood, and agree to comply with the OTIS Code of Conduct.
3. **Comments & Attachment:** Enter any required comments and upload the signed Code of Conduct document where applicable.

# Sustainability Form

This Risk Assessments has two sections: One collecting information about **Your Company** and **Your Suppliers**.

**Sustainability Risk Assessment** \*Indicates required

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Question 1

Have any of your employees or third parties claimed YOUR COMPANY has ever been engaged in these activities?

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	No	Yes
<p>* No child labor or presence of situations where children are subjected to slavery or similar practices or engaged in hazardous work. Note: UN Convention n° 138 on child labor defines a child as a person under the age of 18, but applicable national laws always prevail.</p>	<input type="radio"/>	<input type="radio"/>
<p>* No forced labor by means of violence, threats or illegal restrictions on personal freedom. No use of other prohibited forms of labor including trafficking of persons, bonded labor, recruiting for labor or services by means of fraud, trickery, threat, or by taking advantage of another person's difficulties or vulnerabilities.</p>	<input type="radio"/>	<input type="radio"/>

### Sections

- 1. **Question 1 (No Child Labor):** Review the child labor statement and indicate whether your company and its suppliers have policies or codes of conduct requiring compliance with this standard.
- 2. **Question 2 (No Forced Labor):** Review the forced labor statement and select whether your company and its suppliers maintain policies or authoritative documents that ensure adherence to this requirement.

# Sustainability Form

<p>* Assure a safe and healthy work environment for your workers, including reasonable work hours and conditions.</p>	<input type="radio"/>	<input type="radio"/>
<p>* Respect worker rights to freely associate and bargain collectively as they exist under applicable laws in the countries where you operate.</p>	<input type="radio"/>	<input type="radio"/>
<p>* Provide all employees, contractors, temporary workers, business partners, jobseekers and potential business partners with equal opportunity without discrimination and free of discriminatory selection criteria. For instance, no discrimination based on gender, age, race, ethnicity or any other protected status.</p>	<input type="radio"/>	<input type="radio"/>
<p>* Pay all workers a living wage and benefits which meets or exceeds the applicable minimum wage and provide equal pay for equal work.</p>	<input type="radio"/>	<input type="radio"/>
<p>* Ensure that work hours are reasonable and do not exceed the maximum work hours established by law.</p>	<input type="radio"/>	<input type="radio"/>

### Sections

**Question 3 (Safe Working Conditions):** Review the statement on safe and healthy working conditions and confirm whether your company and its suppliers have documented policies mandating compliance.

**Question 4 (Freedom of Association):** Review the statement on worker rights to freely associate and bargain collectively and indicate whether your company and its suppliers have policies that require alignment with this principle.

**Question 5 (Non-Discrimination):** Review the statement on providing equal opportunity without discrimination and indicate whether your company and its suppliers have policies requiring compliance with this standard.

**Question 6 (Living Wage & Equal Pay):** Review the requirement to pay a living wage and ensure equal pay for equal work, then select whether your company and its suppliers maintain policies enforcing this practice.

# Sustainability Form

<p>* Employers and agents may not hold or otherwise destroy, conceal, or confiscate identity or immigration documents, such as government-issued identification, passports, or work permits unless required by law. In this case, at no time should workers be denied access to their documents.</p>	<input type="radio"/>	<input type="radio"/>
<p>* Workers shall not be required to pay employers' agents recruitment fees or other related fees for their employment.</p>	<input type="radio"/>	<input type="radio"/>
<p>* Have mechanisms for workers to anonymously raise concerns related to working conditions or workplace grievances and have access appropriate remedy.</p>	<input type="radio"/>	<input type="radio"/>
<p>* Have processes in place to identify, assess, and mitigate risks specific to human rights including but not limited to human trafficking in its supply chain.</p>	<input type="radio"/>	<input type="radio"/>
<p>* Provide training to your workers on human rights and risks to human rights.</p>	<input type="radio"/>	<input type="radio"/>
<p>* Regularly assess the potential risk for human rights violations and negative environmental impact in your supply chain. Take corrective actions to mitigate these risks and impacts.</p>	<input type="radio"/>	<input type="radio"/>

## Sections

**Question 7 (Reasonable Working Hours):** Review the statement on maintaining reasonable work hours and confirm whether your company and its suppliers have documented policies that enforce compliance with this requirement.

**Question 8 (No Confiscation of Documents):** Review the restriction on withholding or confiscating worker identity or immigration documents and indicate whether your company and its suppliers have policies preventing this practice.

**Question 9 (No Recruitment Fees):** Review the prohibition on charging workers recruitment or related employment fees and select whether your company and its suppliers have policies that ensure compliance.

**Question 10 (Workplace Grievance Mechanisms):** Review the requirement for confidential grievance mechanisms and indicate whether your company and its suppliers have processes allowing workers to raise concerns anonymously.

CPM 17- EH&S \*Indicates required

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Company Information

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\*What type of work will you perform for OTIS?

---

\*Number of Employees who will work on OTIS Project/Contracts

Range: 1 - 10000

---

Safety

---

\*Over the last 2 years, did you experience fatalities ?

Yes  
 No

---

\*Over the last 2 years, experience serious injuries incidents?

Yes  
 No

---

\*Over the last 2 years, did you experience other work-related incidents ?

Yes  
 No

---

\*Over the last 2 years, receive government agency enforcement actions?

Yes  
 No

The questions in this section help us understand more about your Environmental, Health, & Safety program and performance.

\*Do you have a PPE management to assure the proper/certified PPE to all workers according to the type of risks in enough amount as well provide training and inspection to assure the proper use?

Yes  
 No

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\*Do you have processes to support Otis-lead inspections and audits, including Fatality Prevention Audits, Pre-start Inspections, In-process Management Audits, and other jobsite safety inspections/audits, and to ensure that all noted gaps are promptly and effectively corrected?

Yes  
 No

---

\*Do you have processes to manage Hazardous materials?

Yes  
 No

---

\*Do you have processes to ensure that Otis is promptly notified of fatalities and serious injuries involving subcontractor personnel, serious environmental incidents, and serious environmental near miss incidents involving work being performed for Otis?

Yes  
 No

# CPM-17 GS- 110

This section shares the safety related fundamentals that Otis expects of its suppliers.

## CPM 17-GS-110

Please read the GS-110 Contractor EH&S Management Program requirements before proceeding by clicking Show More.

<b>Local EH&amp;S laws &amp; regulations</b>	<ul style="list-style-type: none"> <li>Comply with all applicable laws, codes and regulations on environment, health and safety.</li> <li>Obtain all licenses and qualifications necessary to carry out the tasks (including business license, permits for special equipment, special operation certificates and workers certificates).</li> </ul>
<b>OTIS safety requirements</b>	<ul style="list-style-type: none"> <li>Adhere to all Otis safety requirements and instructions, including, without limitation:             <ul style="list-style-type: none"> <li>Basic EH&amp;S rules and regulations (*) and Otis global safety standards.</li> <li>All relevant field methods (e.g., field installation manual, repair manual); and</li> <li>The Otis relevant fatality prevention and jobsite safety procedures.</li> </ul> </li> <li><b>Basic EH&amp;S Rules and Regulations – The following EH&amp;S programs and local regulations related it:</b> <ul style="list-style-type: none"> <li>Otis Cardinal Rules</li> <li>Energy Isolation (LOTO)</li> <li>Electrical safety</li> <li>Confined space entry</li> <li>Fall protection</li> <li>Scaffolding requirements</li> <li>Personal Protective Equipment (PPE)</li> <li>Walking &amp; working surfaces (to include ladders)</li> <li>Local environmental</li> <li>Stop work authority</li> <li>Hot work permits</li> <li>Compressed gases</li> <li>Powered industrial vehicles</li> <li>Machine guarding</li> <li>Local asbestos regulations (if applicable)</li> <li>Spill and emergency response</li> </ul> </li> </ul>

	unsafe, immoral or destructive act, breaches this Safety Protocol, or demonstrates any potential risk of committing the aforesaid acts.
<b>Inspections &amp; Audits</b>	<ul style="list-style-type: none"> <li>Regularly conduct safety inspections of its workers on jobsites</li> <li>Take corrective and preventive actions based on its own investigation process and identified deviations from root causes.</li> </ul>
<b>Incident Reporting</b>	<ul style="list-style-type: none"> <li>Report all fatal and serious injuries, lost time cases, medical treatment cases, potential serious injuries, near misses, environmental leakages, spills to the soil, air or water, involving contractor's workers, to an Otis supervisor, manager or local EH&amp;S officer.</li> <li>Investigate any fatal or serious injury case within 30 days. Submit all findings to, and review the investigation outcome (including root causes and corrective/preventive plan) with local Otis operation's management.</li> <li>Cooperate with any Otis investigation in all aspects, including but not limited to making its workers available for interviews, producing relevant documentation, and determining root cause and corrective actions.</li> </ul>

Show less

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\*Acknowledgement

I have read and understand the GS-110 Contractor EH&S Management Program requirements. I attest our company will comply with the requirements and we will report any suspected or actual violations.

I have questions regarding the GS110 GS-110 Contractor EH&S Management Program requirements and/or I cannot attest that our company will follow the requirements.

---

Cancel
1/1
Save
Submit

# CPM17 – Compliance Form

**CPM-17 Compliance** \*Indicates required

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Post or current relationship with OTIS

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Please briefly describe all past or current business relationships with OTIS (period, location, primary contact person for the business relationship, type of business relationships)

If there were no past business relationship, how did your company come to learn of OTIS? Please list your employee(s)

---

Please indicate if individuals of your company mentioned above were:

---

Previously or current employed by OTIS

If so, provide names, contact, address and details

---

are any way related to anyone previously or currently employed by OTIS,

If so, please provide the names, contact, address and details

The CPM17 – Compliance Form survey, covered on the next few slides, helps Otis understand more about your organization and its anti-bribery and anti-corruption practices.

## Sections

✓ **Criteria:** High / Field Vendors

- 1. Past or Current Relationship with OTIS:** Describe any past or current business relationships with OTIS, including the period, location, primary contacts, and type of business performed; if none, indicate how your company became aware of OTIS.
- 2. Former or Current OTIS Employment:** Indicate whether any individuals from your company were previously or are currently employed by OTIS, and provide their names, contact information, and relevant details if applicable.
- 3. Personal Relationships with OTIS Employees:** Confirm whether any individuals from your company are related to current or former OTIS employees and—if applicable—provide names, contact details, and relationship details.

# CPM17 – Compliance Form

Ethics & Compliance		
	No	Yes
Does your company have a written document (for instance code, policy or communication) that requires compliance with laws regarding anti-bribery, corruption and anti-trust?	<input type="radio"/>	<input type="radio"/>
Does your company provide training for its employees on anti-corruption, anti-bribery or anti-trust ?	<input type="radio"/>	<input type="radio"/>
Does your company have an internal procedure, process, guideline or instruction (e.g. approval, record keeping, restrictions, other) on gift giving (*) to customers and suppliers (or their representatives), Governments Officials, architects, design bureau or similar type of intermediaries?	<input type="radio"/>	<input type="radio"/>

### Sections

- 1. Anti-Bribery & Anti-Corruption Policy:** Indicate whether your company has a written policy, code of conduct, or communication that requires compliance with anti-bribery, anti-corruption, and anti-trust laws.
- 2. Employee Training:** Confirm whether your company provides training to employees on anti-corruption, anti-bribery, or anti-trust requirements.
- 3. Gifts & Hospitality Procedure:** Indicate whether your company has internal procedures or guidelines governing gifts or benefits offered to customers, suppliers, government officials, architects, or similar intermediaries.

# CPM17 – Compliance Form

Does your company have an internal procedure, process, guidelines or instructions (e.g. approval, record keeping, restriction, other) on making contributions to charity?	<input type="radio"/>	<input type="radio"/>
	No	Yes
Clarify if it deals with charity made at the direction of customers and suppliers (or their representatives), Governments Officials, architects, design bureau or similar type of intermediaries, or to organizations owned to such parties:	<input type="radio"/>	<input type="radio"/>
	No	Yes
Does your company understand and agree that, if approved to act as service vendor, it is not allowed to make improper payments or pay bribes, in any shape, form or value, to anyone	<input type="radio"/>	<input type="radio"/>
	No	Yes
Is your company confident that it can effectively act as service vendor without resorting to such improper payments or bribes, in any shape, form or value?	<input type="radio"/>	<input type="radio"/>
	No	Yes
Has any of your company's licenses, permits, or other authorizations ever been suspended or revoked by a governmental agency?	<input type="radio"/>	<input type="radio"/>
Has your company, its owners, directors or key individuals listed in Section "Company Information", and, to your best knowledge, any of your company's employees ever been the subject of an investigation by law enforcement or government agencies?	<input type="radio"/>	<input type="radio"/>

## Sections

- Charitable Contributions Procedure:** Indicate whether your company has internal procedures or guidelines governing charitable contributions, including approval, record-keeping, and restrictions.
- Charity Directed by External Parties:** Confirm whether your company's charitable contributions ever occur at the direction of customers, suppliers, government officials, architects, or similar intermediaries.
- Improper Payments & Bribery Compliance:** Confirm that your company understands it cannot make improper payments or bribes in any form if approved as a service vendor.
- Ability to Operate Without Improper Payments:** Indicate whether your company is confident it can perform services for OTIS without relying on improper payments, bribes, or benefits of any kind.
- Licenses or Permits Suspended:** Indicate whether any company licenses, permits, or authorizations have ever been suspended or revoked by a governmental authority.
- Investigations of Key Individuals:** Confirm whether your company, its owners, directors, key individuals, or employees have ever been subject to an investigation by law enforcement or government agencies.

# CPM17 – Compliance Form

	No	Yes
Has your company, its owners, directors or key individuals listed in Section "Company Information", and, to your best knowledge, any of your company's employees ever been: (b) suspended from doing business, detained by law enforcement for over 24 hours, been convicted of having engaged in fraud, bribery, misrepresentation, and/or any other criminal act, or currently have criminal charges pending against them alleging such conduct?	<input type="radio"/>	<input type="radio"/>
<b>References</b> Please Provide 2 business references that can confirm the information provided in this Questionnaire		
* First Contact Person Name		
<input type="text"/>		
* Company		
<input type="text"/>		
* Address (Street, Number, City, Country)		
<input type="text"/>		
* Telephone		
<input type="text"/>		

## Sections

- 1. **Government Relationships:** Indicate whether your company—or any of its owners, directors, key individuals, or employees—has any current or past connection with government officials or government entities, including family or business relationships, ownership interests, representation or consulting roles, compensation received, or any involvement that could create a government-related conflict of interest.
- 2. **Customer Relationships:** Indicate whether your company—or its employees—has any personal, ownership, representation, or consulting relationships with customers or potential customers, including situations where a customer could personally benefit, hold ownership in your company, or provide compensation related to current or upcoming projects.

Second Contact Person Name		
<input type="text"/>		
Company		
<input type="text"/>		
Address (Street, Number, City, Country)		
<input type="text"/>		
Phone 2		
<input type="text"/>		
Cancel	1/2	Next

# CPM17 – Compliance Form

	No	Yes
Would any customer (or its employees) have a personal interest, or personally benefit in any way, as a result of the business relationship with Otis ?	<input type="radio"/>	<input type="radio"/>
Relationship with government organizations or officials		
	No	Yes
Is (or was) any owner, director or key individual listed by in Section "Company Information" previously or currently a Government Official or in any way related to a Government Official (by family, marriage or through business association)?	<input type="radio"/>	<input type="radio"/>
	No	Yes
Is your company currently an agent, any other type representative or consultant of a Government or any Government Official? Has or will your company receive any form of compensation from any Government or any Government Official?	<input type="radio"/>	<input type="radio"/>
	No	Yes
Is your company owned (even partially) by any Government or any Government Official? Is your company related to an entity owned (even partially) by any Government Official or any	<input type="radio"/>	<input type="radio"/>

## Sections

- 1. Relationship with Customers:** Indicate whether there is any relationship with a customer. If applicable, describe the nature of the relationship, the individuals involved, and how they would benefit from the relationship with OTIS.
- 2. Relationship with Government:** Indicate whether there is any relationship with a government entity. If applicable, describe the nature of the relationship, the individuals involved, and how they would benefit from the relationship.

<b>Relationship</b>		
Relationships with customers		
	No	Yes
Is your company owned (even partially) by a customer of your company (or by a potential customer related to projects in the pipeline)?	<input type="radio"/>	<input type="radio"/>
	No	Yes
Is your company currently an agent, any other type representative or consultant of a customer? Has (or will) your company receive any form of compensation from any customer related to projects in the pipeline?	<input type="radio"/>	<input type="radio"/>

# CPM17 – Compliance Form

	No	Yes
Does any Government Official currently personally benefit in any way as a result of your company conducting its business?	<input type="radio"/>	<input type="radio"/>
Would any Government Official have an interest, or personally benefit in any way, as a result of the business relationship between our companies?	<input type="radio"/>	<input type="radio"/>
<b>Other Relationships/Affiliations</b>		
If your company acts as service vendor for OTIS, would that be contrary to any contractual relationship that your company, its owners, directors or key individual have with any third party?	<input type="radio"/>	<input type="radio"/>
Did your company have at any time in the past, or do you now have, a business relationship with a company that provided in the past or now provides products or services which compete with the OTIS products or services?	<input type="radio"/>	<input type="radio"/>
<b>Acknowledgment</b>		
Authorizes and hereby gives consent to OTIS, for the sole purpose of : - Conducting a background analysis of your company; -Evaluating its suitability to represent OTIS, or act as OTIS's service vendor to process and use the data and documents provided in this questionnaire, share such data or documents with OTIS's employees, affiliates, and agents who are bound by a confidentiality; agreement to protect such data, conduct any and all reviews, checks, analysis, and screening of your company and its directors, officers, employees, business practices, etc.		
<a href="#">Show more</a>		
<input type="button" value="Previous"/>	2/2	<input type="button" value="Save"/> <input type="button" value="Submit"/>

### Sections

- 1. **Government Official Personal Benefit:** Indicate whether any government official could personally benefit in any way from your company conducting business with OTIS.
  - 2. **Government Official Interest in the Relationship:** Confirm whether any government official may hold an interest or personally benefit from the business relationship between your company and OTIS
  - 3. **Other Relationships & Affiliations:** Indicate whether acting as an OTIS service vendor would conflict with any existing third-party contractual obligations and whether your company has had, or currently has, any business relationships with organizations that provide products or services competing with OTIS.
- ✓ **Note:** User responses might trigger an additional approval

# Engagement of Activities

**Engagement of Activities** \*Indicates required

---

**1** Question 1:

Have any of your employees or third parties claimed YOUR COMPANY has ever been engaged in these activities?

	No	Yes
* Disregard for occupational health and safety	<input type="radio"/>	<input type="radio"/>
* Violations of the prohibition on withholding reasonable wages	<input type="radio"/>	<input type="radio"/>
* Violations of the prohibition of unequal treatment in employment	<input type="radio"/>	<input type="radio"/>
* Violations of Child labor laws	<input type="radio"/>	<input type="radio"/>
* Violations of laws and legal requirements regarding forced labor	<input type="radio"/>	<input type="radio"/>
* Disregard for freedom of association	<input type="radio"/>	<input type="radio"/>
* Unnecessary use of force by private or public security forces directed by your company	<input type="radio"/>	<input type="radio"/>
* Destruction the environment due to pollution, deforestation or other unsustainable practices	<input type="radio"/>	<input type="radio"/>
* Illegal violation of land rights	<input type="radio"/>	<input type="radio"/>
* Impairment of other human rights	<input type="radio"/>	<input type="radio"/>

If you would like to share comments regarding any of your responses in this section, please enter them here:

**2**

The Engagement of Activities survey, helps Otis understand more about your organization and your company's expectations of its suppliers.

## Sections

- 1. Engagement of Activities:** Indicate whether your company has ever been accused by employees or third parties of engaging in prohibited practices such as safety violations, wage withholding, unequal treatment, child or forced labor, environmental harm, or other human rights violations.
- 2. Comments:** If you select **Yes** for any item, provide additional details or clarification in the comments field.

# Engagement of Activities

3

Question 2:

Are you aware of any of YOUR SUPPLIERS being engaged in these activities?

	No	Yes
* Disregard for occupational health and safety	<input type="radio"/>	<input type="radio"/>
* Violations of the prohibition on withholding reasonable wages	<input type="radio"/>	<input type="radio"/>
* Violations of the prohibition of unequal treatment in employment	<input type="radio"/>	<input type="radio"/>
* Violations of Child labor laws	<input type="radio"/>	<input type="radio"/>
* Violations of laws and legal requirements regarding forced labor	<input type="radio"/>	<input type="radio"/>
* Disregard for freedom of association	<input type="radio"/>	<input type="radio"/>
* Unnecessary use of force by private or public security forces directed by your company	<input type="radio"/>	<input type="radio"/>
* Destruction the environment due to pollution, deforestation or other unsustainable practices	<input type="radio"/>	<input type="radio"/>
* Illegal violation of land rights	<input type="radio"/>	<input type="radio"/>
* Impairment of other human rights	<input type="radio"/>	<input type="radio"/>

4

If you would like to share comments regarding any of your responses in this section, please enter them here:

Cancel

1/1

Save

Submit

## Sections

- 3. Supplier Engagement of Activities:** Indicate whether you are aware of any suppliers engaging in prohibited practices such as safety violations, wage withholding, unequal treatment, child or forced labor, environmental harm, or other human rights violations.
- 4. Comments:** If you select **Yes** for any item, provide additional details or clarification in the comments field.

# CPM17 – Additional Company Information

2

Who is your legal representative or agency that handles your legal affairs?

For instance, the name of the person within your company who handles the legal affairs or the external law firm who manages this for your company.

Who is the Senior Manager in charge of the relationship with OTIS?

Name

Title

Email

This section helps Otis understand more about your organization.

## Sections

- 1. Company Details:** Enter your company's legal and operational information, including legal name, website, office phone, billing address, public trading status, and the company's formation date and jurisdiction.
- 2. Compliance & Legal Status:** Provide the company's registered business scope, confirm good standing and valid licenses, indicate financial stability (not bankrupt or high risk), and list the legal representative or agency responsible for managing your company's legal affairs.

### CPM 17- Additional Company Information

Full legal name

1

Website

Office Phone

Billing Address

# CPM17 – Additional Company Information

## 4 Ethics and Compliance

Your company will act as an Otis supplier and will not make improper payments, nor pay bribes, in any shape, form or value

If any statement in this section on Ethics & Compliance is not correct or not applicable for your company , please explain:

## 5 Company Owners

Company Owner 1 Name, Address and Ownership Percentage

Company Owner 2 Name, Address and Ownership Percentage

Company Owner 3 Name, Address and Ownership Percentage

Please confirm that the ownership of your company is made up of LESS THAN 50% of members who's most recent citizenship or permanent residency is in Crimea, Cuba, Iran, Libya, North Korea, Russia, South Sudan, Syria, or Venezuela.

## Sections

- 3. Senior Manager Relationship:** Provide the name, title, email, and phone number of the OTIS Senior Manager responsible for the vendor relationship.
- 4. Ethics & Compliance:** Confirm your company's commitment to operating without improper payments or bribery and provide clarification if any statement in this section does not apply.
- 5. Company Owners:** Enter the names, addresses, and ownership percentages of company owners and confirm that less than 50% of ownership is held by individuals from restricted regions.

Who is the Senior Manager in charge of the relationship with OTIS?

Name

Title

Email

Telephone Number

A man in a dark suit stands with his back to the camera inside a futuristic, cylindrical glass elevator. The elevator has a glowing circular light fixture at the top and a glowing base. The background shows a modern city skyline with various skyscrapers and a body of water. The scene is lit with cool blue and white tones, creating a high-tech, futuristic atmosphere. A large, dark blue geometric shape is overlaid on the left side of the image, containing the text.

**Existing Supplier: Update your name,  
address, or banking information**

# Update Company Name, Address, or Banking Information

After your company information is added to Otis' purchasing systems, your company will be assigned a Supplier Number. You can find your Supplier Number on your Purchase Orders, or you can contact your Otis representative.

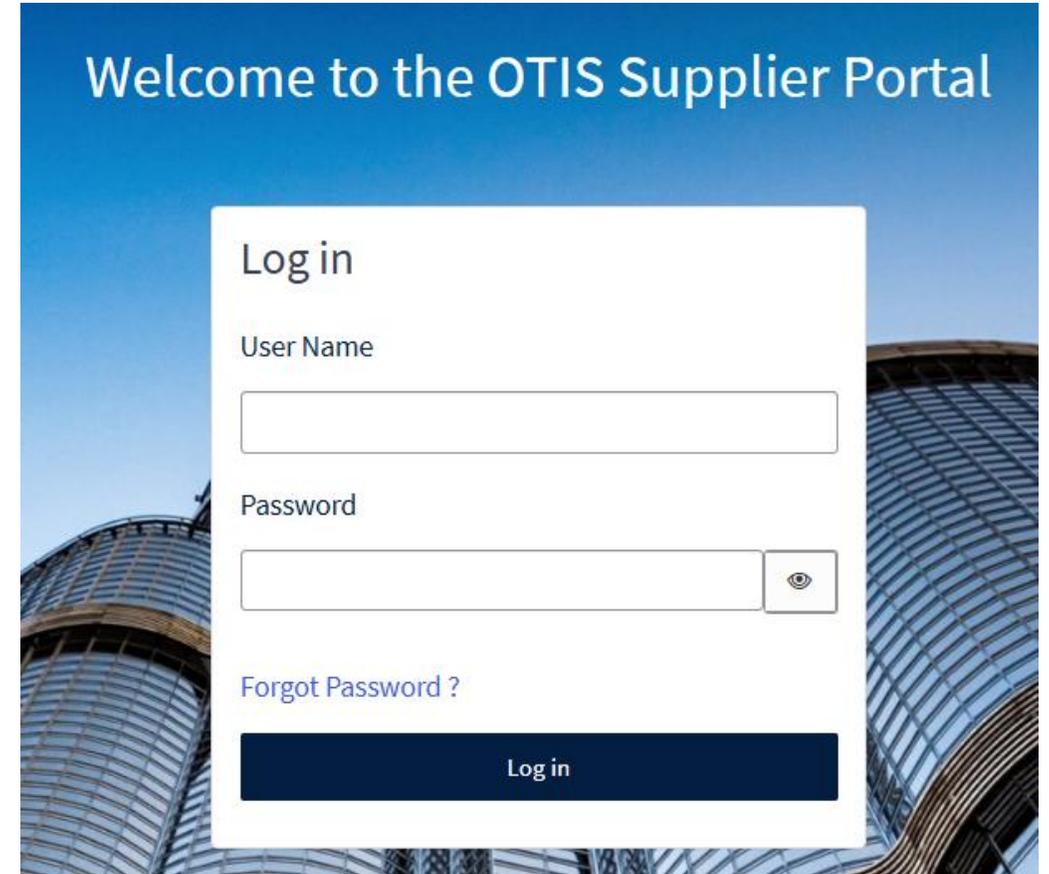
## Information you will need:

- Otis assigned Supplier Number
- Government issued Tax ID/Company Registration Number

**Sign in to iDOT Supplier Portal** (instructions are provided earlier in this presentation)

- **If you don't have a login ID, contact your Otis representative or [OtisSupplierDataAmericas@otis.com](mailto:OtisSupplierDataAmericas@otis.com).**

URL: [https://genpactotitest.service-now.com/vp?id=vp\\_login](https://genpactotitest.service-now.com/vp?id=vp_login)



Welcome to the OTIS Supplier Portal

Log in

User Name

Password

[Forgot Password ?](#)

Log in

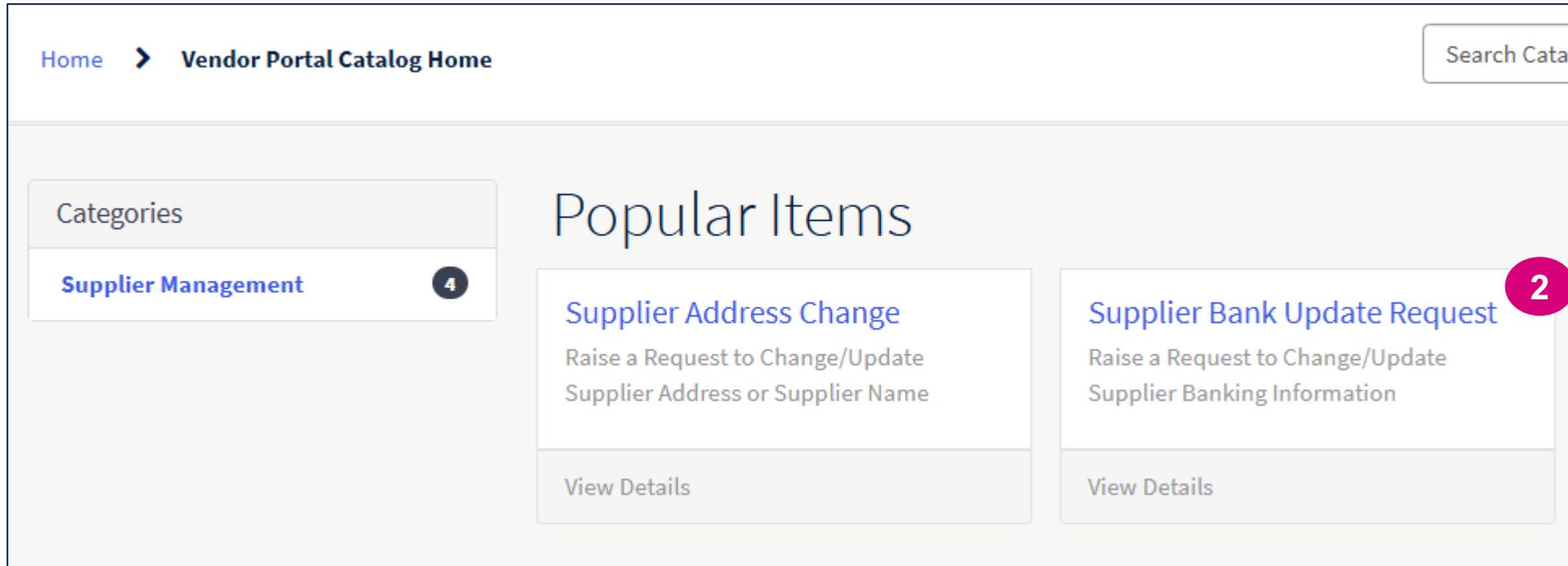
# Update Company Name, Address, or Banking Information

The screenshot displays the OTIS user interface. At the top left is the OTIS logo. On the top right, there are links for "My requests" and "My tasks". Below the header is a large banner image of workers in a warehouse with the text "How can we help?". A search bar is overlaid on the banner. Below the banner, a dark blue bar contains instructions: "For changes to address or banking information, please submit a request via 'Get Help'" and "To view the status of your existing request please navigate to 'My Requests'". Below this is a "My active items" section with two items: "Requests" with a count of 2 and "Risk & Compliance Checks" with a count of 0. To the right of this section is a "Get help" button with a circular icon and a pink notification badge containing the number 1.

## Sections

1. **Get help:** Click on the Get Help icon.

# Update Company Name, Address, or Banking Information



## Sections

- 2. Supplier Bank Update Request or Supplier Address Change:** Click on tile that aligns with the information you would like to update. For this example, we'll follow the Supplier Bank Update Request

# Update Company Name, Address, or Banking Information

## Supplier Bank Update Request

Raise a Request to Change/Update Supplier Banking Information

**Please Note:**

1. If Supplier has **more than one Banking Information** on JDE, Please reach out to Vendor Admin Team at [OtisSupplierDataAmericas@otis.com](mailto:OtisSupplierDataAmericas@otis.com)
2. To help ensure transparency and to maintain sound control practices, you'll need to **attach evidence of the change** from an independent third party. This helps us maintain the integrity and security of your financial information.
3. If this request is raised by **Business Requestor** Please attach a **written communication** from the Supplier for Updating Banking Information. Once a Request is created by Business Requestor, Supplier is requested to login on the Vendor Portal to Submit the Updated Banking Information.
4. If this request is being raised by **Supplier, Please attach documentation** using the **Paper Clip Icon** at the bottom of this form; Please attach documentation from a third-party verifying your Updated Bank Account Details. For instance, an **Official Bank Letter** or **Bank Statement**. This cannot be a document created by Supplier Company. This request will be rejected if the evidence does not come from an independent third-party source. This helps us maintain the integrity and security of your information.

**Thank you for your cooperation!**

\* Indicates required

Requestor Information

\* Requestor's Name

\* Requestor's Email

Basic Supplier Information

\* Supplier ID with OTIS

\* Supplier's Tax ID/Company Registration Number/TIN

\* OTIS Entity Region  5

Fetch Existing Details 6

Please fill in ERP ID,Tax ID and OTIS Entry Region

## Sections

3. **Supplier ID with Otis:** Enter the supplier ID assigned to you by Otis. If you aren't sure, contact your Otis representative.
4. **Tax ID/Company Registration :** Enter your government issued tax ID or company registration number.
5. **Otis Entity Region :** Select the region of the Otis entity that issues your purchase orders. For instance, if you work with an Otis field office in the United State, you would select North America.
6. **Fetch Existing Details:** Click on the check box next to Fetch Existing Details. This will take a minute to process – move to the next slide for next steps.

# Update Company Name, Address, or Banking Information

Search Supplier ID  
Select Supplier ID  
53599173 | NAA | JDE:AM

Status  
In-Progress **7**

**Please wait until the "Status" field value changes to "Completed".**

**Banking Information** **8**

Bank Transit Number/Routing Number/ABA  
Your information will be here

\* Bank Account Number  
Your information will be here

International Bank Account Number (IBAN)  
Your information will be here

\* Bank Name  
Your information will be here

SWIFT Code/BIC Code/Sort Code  
Your information will be here

Bank Country Code  
Your information will be here

## Sections

- 7. Status:** Wait until the status changes to Completed
- 8. Bank information:** If the information you provided directly matches the information in Otis' systems, your banking information will be populated. You can type over the existing information to reflect the update you would like to make.
  - If there is not a direct match, your information will not be populated. You will need to contact [OtisSupplierDataAmericas@otis.com](mailto:OtisSupplierDataAmericas@otis.com) for assistance.

# Update Company Name, Address, or Banking Information

**Banking Information**

Bank Transit Number/Routing Number/ABA

International Bank Account Number (IBAN)

SWIFT Code/BIC Code/Sort Code

\* Bank Account Number

\* Bank Name

Bank Country Code

**9**  \* Add attachments

**9. Sections Attachments:** To help ensure transparency and to maintain sound control practices, you'll need to **attach evidence of the change** from an independent third party. For instance, an **Official Bank Letter** or **Bank Statement**. This cannot be a document created by your company. This helps Otis maintain the integrity and security of your financial information.

# Update Company Name, Address, or Banking Information

Home > IDOT > Supplier Management > **Supplier Bank Update Request**

Search Catalog

## Supplier Bank Update Request

Raise a Request to Change/Update Supplier Banking Information

**Please Note:**

 Save as Draft

**10**

## 10. Sections

**Submit:** Click on Submit. Your request will be routed to Otis for processing.

If you have any questions throughout the process, you can contact:

[OtisSupplierDataAmericas@otis.com](mailto:OtisSupplierDataAmericas@otis.com)

**Thank You**

