

# Constellia Service Provider Onboarding Guide

## OVERVIEW

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When working with us you will benefit from a quick, easy and compliant route to market, with access to opportunities across the public and private sector.

This Guide is designed to help you become part of the Constellia service provider chain which is a two-stage process.

1. **Onboarding** - mandatory stage which allows service providers to begin receiving tendering opportunities.
2. **Accreditation** - optional stage which allows service providers to develop their profile on the system with details of case studies and references.

The Guide explains the initial Onboarding process. You can request the Accreditation Guide by emailing [info@constellia.com](mailto:info@constellia.com)

## HOW IT WORKS

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There is no charge to become a Constellia service provider or to bid for opportunities. A management fee is only applied to any successful projects you win. Clients can access your services via a mini competition or a direct award process which Constellia will manage.

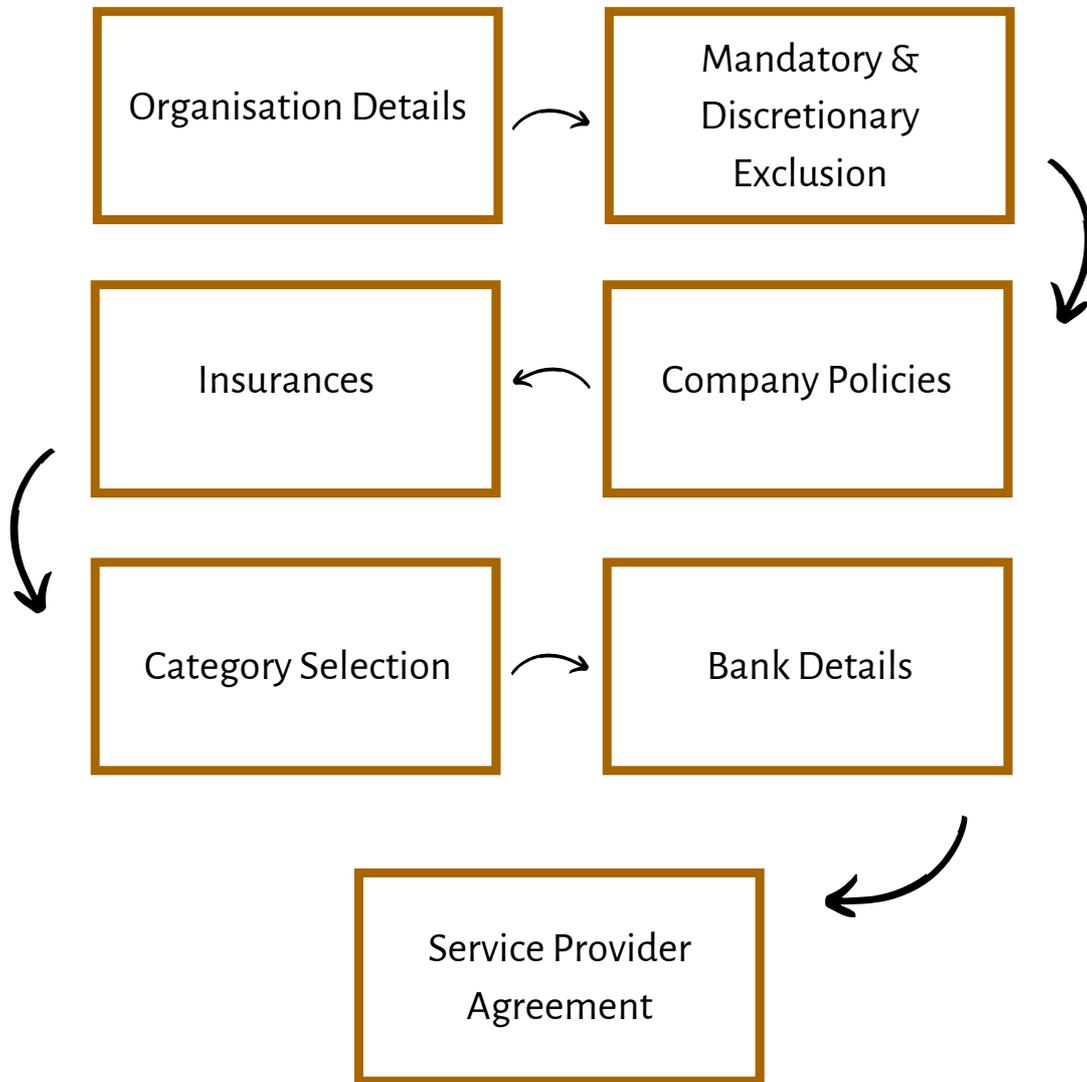
Service provider benefits:

- Access to bid for exclusive contracts that are otherwise unavailable to the greater market;
- Ability to promote your capabilities to our client base via your page;
- Build relationships with public sector clients and allows for direct awards;
- Mitigates IR35 risk;
- Accreditation badge enables service providers to market themselves as an approved and compliant service provider of Constellia.

You only need to onboard with us once to gain access to all Constellia clients. Your details are saved on our portal and you will be contacted once a suitable bidding opportunity arises. You can also update and amend your profile at any time.

# ONBOARDING PROCESS FLOW

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## HOW TO BECOME A SERVICE PROVIDER

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You will need to complete a profile by using the following link:

<https://www.constellia.net>

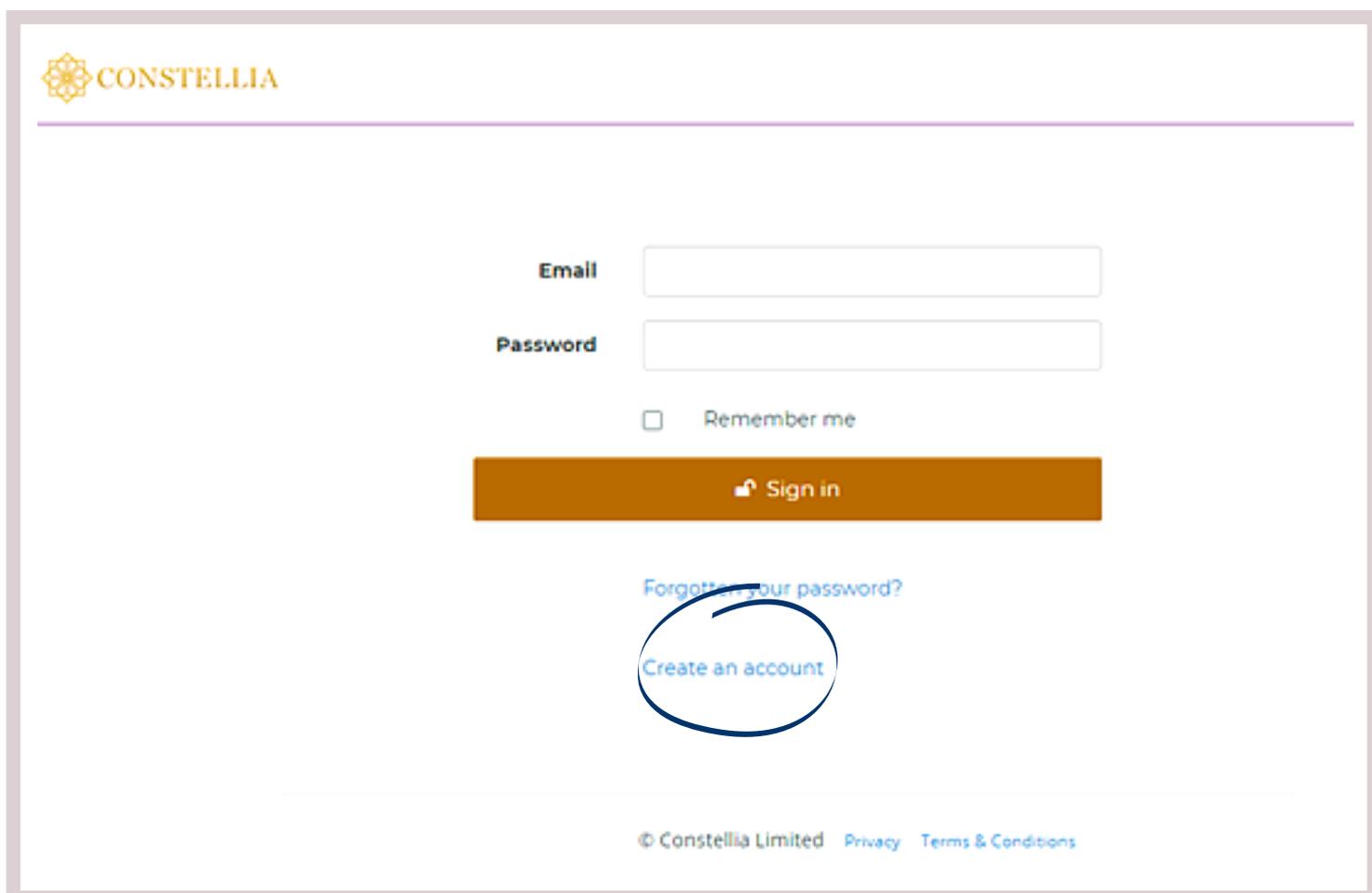
Information required before getting started:

- Full company details
- VAT number
- Insurance details
- Self-Certification regarding policies
- Answers to mandatory and discretionary grounds for exclusion questions
- Bank Details

## CREATING AN ACCOUNT

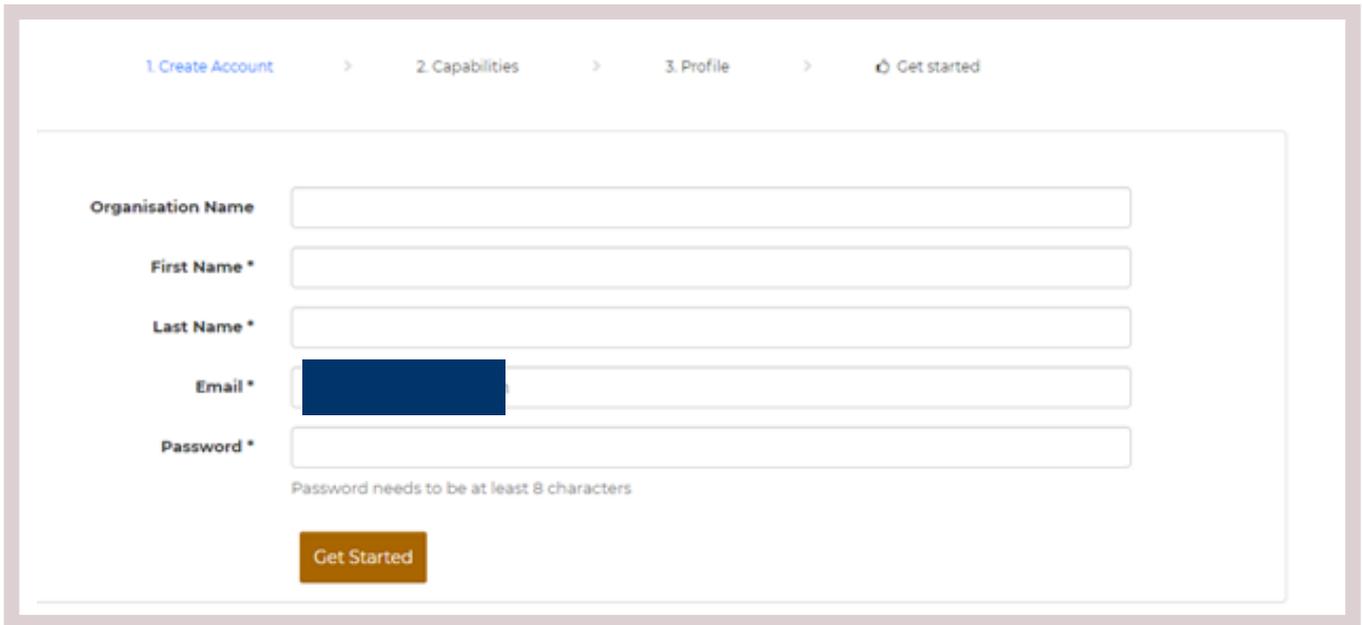
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1. Visit <https://www.constellia.net>
2. From the log in page, select 'Create an account.'



The screenshot shows the Constellia login page. At the top left is the Constellia logo. Below it are two input fields for 'Email' and 'Password'. Under the password field is a checkbox labeled 'Remember me'. A large orange button with a white arrow icon and the text 'Sign in' is centered below the inputs. Below the 'Sign in' button are two links: 'Forgotten your password?' and 'Create an account'. The 'Create an account' link is circled in blue. At the bottom of the page, there is a footer with the text '© Constellia Limited Privacy Terms & Conditions'.

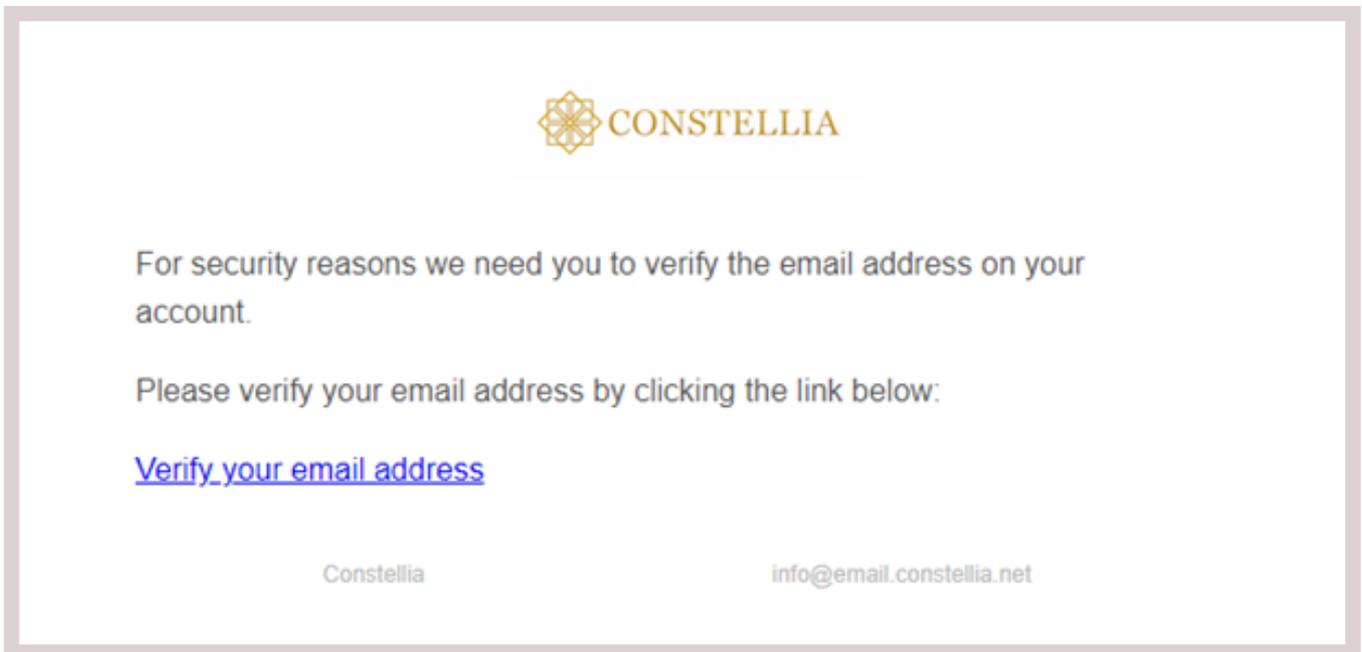
3. Complete all required fields (marked \*) then press 'Get Started'.



The screenshot shows a registration form with the following fields and elements:

- Progress bar: 1. Create Account > 2. Capabilities > 3. Profile > **Get started**
- Organisation Name:
- First Name \*:
- Last Name \*:
- Email \*:  (partially obscured by a blue box)
- Password \*:
- Hint: Password needs to be at least 8 characters
- Get Started button

4. Once you have completed these fields and pressed on the 'Get Started' button, you will receive a verification notification email. Please click 'Verify your email address' once received. You may need to check your spam or junk folders.

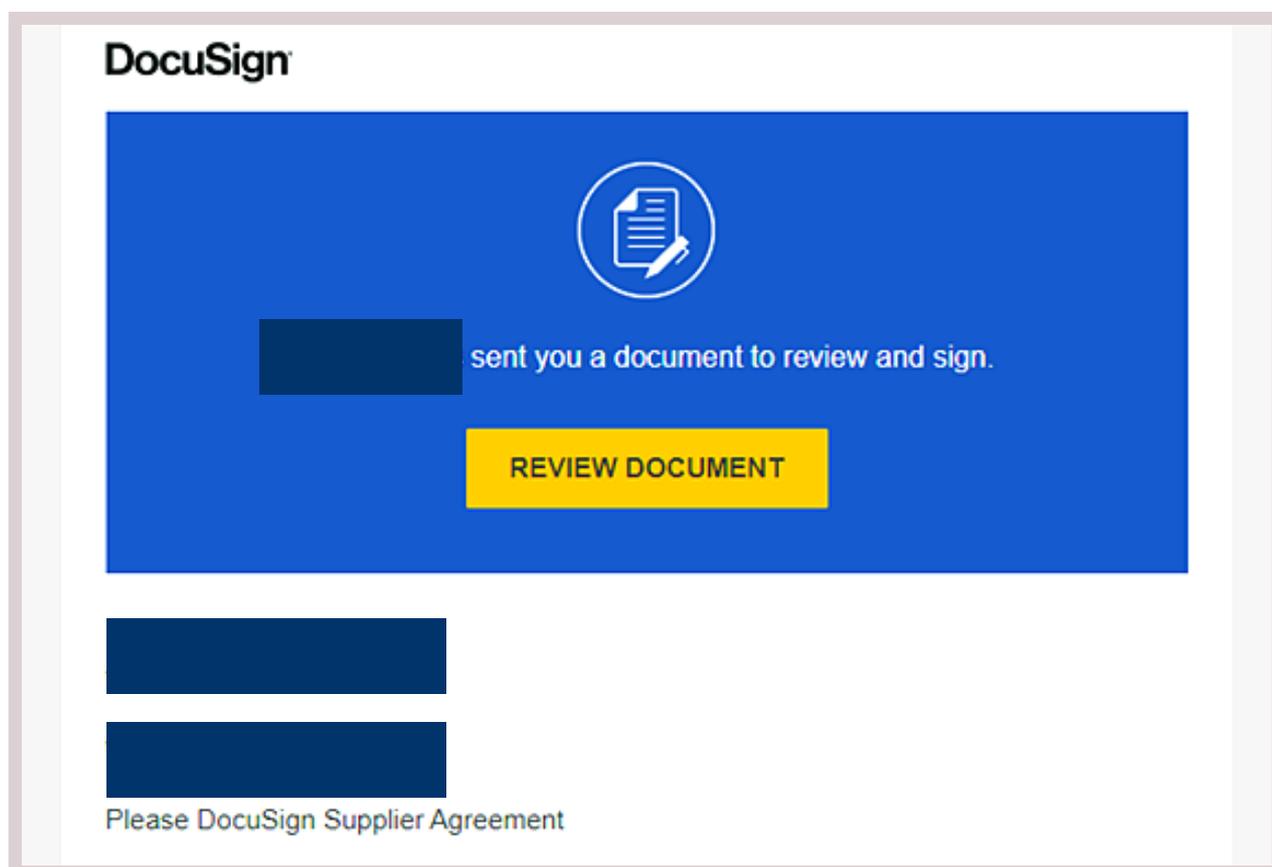


5. Shortly after this point, you will receive an email alert from DocuSign with a copy of the Service Provider Agreement. This agreement effectively allows service providers to enter a contract with Constellia and forms the overarching terms and conditions that will apply for any successful engagement. For individual projects, service providers will receive a statement of work (template provided within the agreement) where project specific clauses can be amended and/or included.

You will be required to your companies information in DocuSign to populate the contract. It is important that you enter this information accurately, and inform Constellia if any information provided changes.

You can sign the document by either uploading or drawing a signature. You are also able to delegate the signature process to another member within your organisation by clicking on the 'change signer' button in the top right-hand corner of the page.

If you have any questions relating to this contract, please contact [support@constellia.com](mailto:support@constellia.com). You are able to continue with other parts of the Onboarding process while this agreement is being reviewed.



# CAPABILITIES

6. The capabilities section asks you to highlight the service(s) your company specialises in. By selecting the capabilities tab, you will be able to see a pre-defined capability list. Your capabilities selection allows Constellia to contact you about suitable bidding opportunities. Once you are happy with your selection, please press 'Continue to Profile Setup at the bottom of the page'.

**Complete your registration to access project opportunities**

✓ Create Account > **2. Capabilities** > 3. Profile > 🏠 Get started

**Tag your capabilities**

[View possible capabilities ^](#)

We use a predefined classification scheme to help us group our service providers. If your expertise is not shown in this list then please contact your Constellia representative who will be able to add it to the classification scheme.

<b>Asset Management</b>	<b>Business Strategy</b>
<ul style="list-style-type: none"><li>• Asbestos (not removal)</li><li>• Asset Disposal</li><li>• Building Inspection</li><li>• Building Survey</li><li>• Chartered Surveyors</li><li>• Conservation and Preservation Consultancy</li><li>• Fire Inspection</li><li>• Health and Safety</li><li>• Property Consultancy</li><li>• Property Management Services</li><li>• Quantity Surveying</li><li>• Space Management</li><li>• Specialist Fire Consultancy</li><li>• Valuation</li><li>• Water Management</li><li>• Water Savings Survey</li></ul>	<ul style="list-style-type: none"><li>• Alliances/Mergers &amp; Disinvestment</li><li>• Business Planning</li><li>• Compliance</li><li>• Corporate Operational Planning</li><li>• Corporate Performance</li><li>• Corporate Service Delivery</li><li>• Corporate &amp; Service Grouping</li><li>• Data and Analytics</li><li>• Disaster Recovery</li><li>• GDPR</li><li>• KYC/AML</li><li>• New service development</li><li>• Operational Planning</li><li>• Options analysis</li><li>• Outsourcing</li><li>• Peer review</li><li>• Process Mapping</li><li>• Programme Management</li><li>• Risk</li><li>• Service Transformation</li><li>• Trading services</li></ul>

# PROFILE

7. The next sections allows you to complete a company profile which can be amended any time after the Onboarding process. Please press 'Continue Onboarding' once completed.

## Create Account

Complete your registration to access project opportunities

✓ Create Account > ✓ Capabilities > **3. Profile** > 🏠 Get started

**Logo**

- A square logo works best
- We'll use your Gravatar if available



No file chosen

**Location**  
Displayed in your profile and search results.

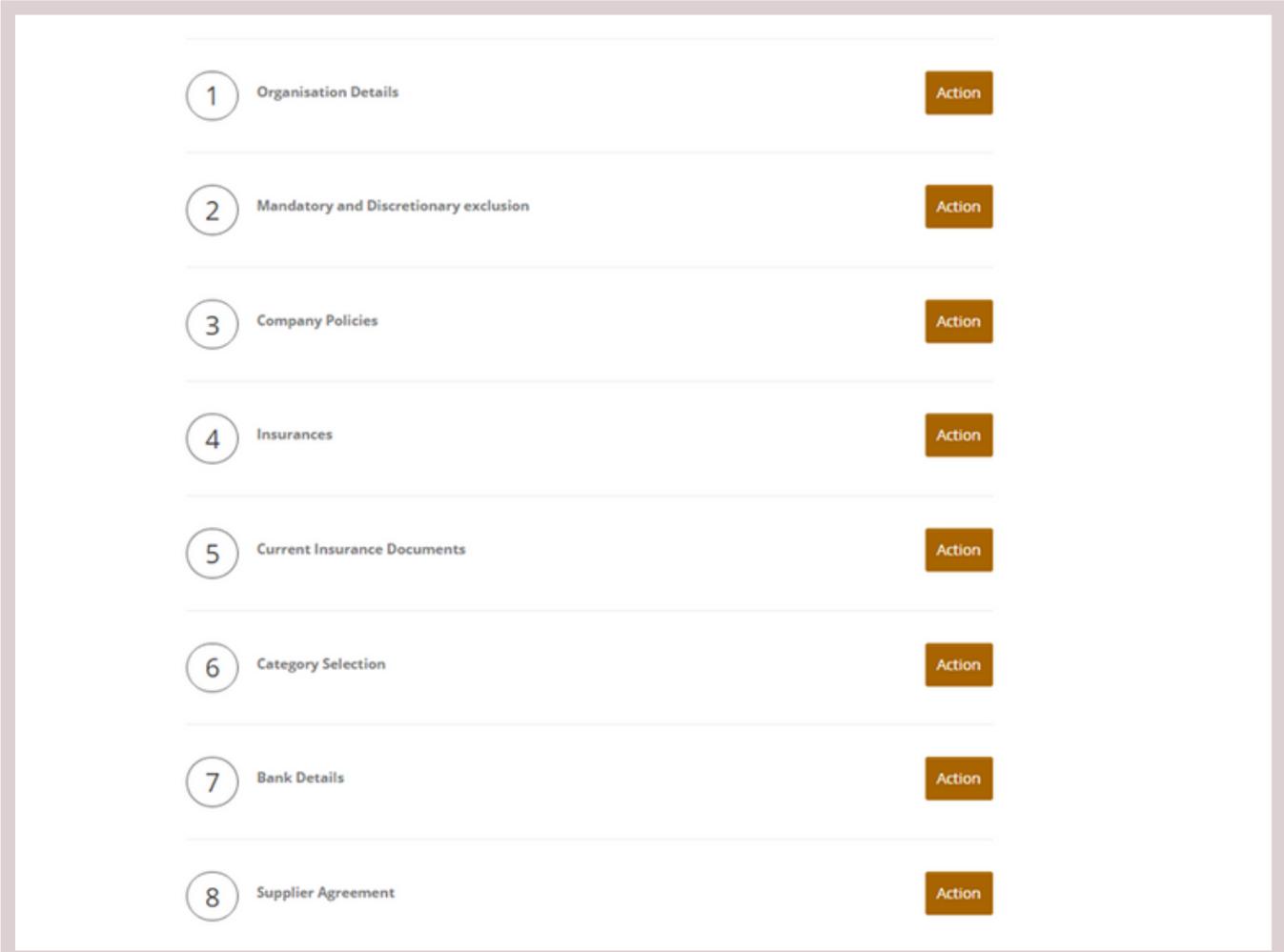
**Headline**  
Stand out with a compelling headline.

Max 120 characters

**Organisation Information**

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8. Once you have set up your account you will be taken to the Onboarding page that finalises your company information. Each section is checked by Constellia prior to Onboarding completion. Press the action button next to each section to submit the information:



The screenshot displays a vertical list of eight onboarding sections. Each section is numbered from 1 to 8 and includes an 'Action' button to the right. The sections are: 1. Organisation Details, 2. Mandatory and Discretionary exclusion, 3. Company Policies, 4. Insurances, 5. Current Insurance Documents, 6. Category Selection, 7. Bank Details, and 8. Supplier Agreement.

1	Organisation Details	Action
2	Mandatory and Discretionary exclusion	Action
3	Company Policies	Action
4	Insurances	Action
5	Current Insurance Documents	Action
6	Category Selection	Action
7	Bank Details	Action
8	Supplier Agreement	Action

9. Starting with Organisation Details' complete all mandatory and relevant fields.

Registered Company Name *:	<input type="text"/>
Registered Office Address	<input type="text" value="Start typing your address..."/>
	Or enter your address manually
Company *	<input type="text" value="ABC Limited"/>
Address line 1 *	<input type="text"/>
Address line 2	<input type="text"/>
City *	<input type="text"/>
Region / State	<input type="text"/>
Postcode *	<input type="text"/>
Country	<input type="text"/>
Trading Name:	<input type="text"/>
Trading Status *:	<input type="text"/>
Trading Status if Other:	<input type="text"/>
Date of registration in country of origin *:	<input type="text"/>
Company Registration Number *:	<input type="text"/>
Charity Registration Number:	<input type="text"/>
Duns number	<input type="text"/>

Company Size \*:

Contact number \*:

Website:

Tax Status \*:

Tax number \*:

Invoice Address:

Or enter your address manually

Company:

Address line 1:

Address line 2:

City:

Region / State:

Postcode:

Country:

Region \*:  Nationwide  
 South West England  
 South East England  
 East Midlands  
 West Midlands  
 North West  
 North East  
 Yorkshire and Humber  
 East of England  
 Greater London

10. You will be asked to complete a set of mandatory and discretionary questions. If the answer to any of these questions is 'yes' you may be asked for further details.

## Manadatory and Discretionary Exclusion

In line with Public Contract Regulations 2015 (PCR 2015) (Regulation 57) – the following questions are grounds for Mandatory and Discretionary exclusion of an organisation from participating in procurements via Constellia. These regulations are set out on the following webpage and should be referred to before continuing..

You need to review the below and complete the yes / no answers, provide a self-clean declaration where required, then click "submit".

- Click "submit" if the answers are correct.
- Or change an answer(s) and provide a self-clean declaration where required.

Please Note:

- By clicking submit you are declaring, on behalf of your organisation, that the answers submitted are correct and accurate. If any factual information is misrepresented, your organisation may be excluded from any current, live procurement procedures and from accessing opportunities via Constellia indefinitely. So please check your answers before submitting.

### Grounds for mandatory exclusion pass/fail

**1. \* Have you, your organisation or any other person with powers of representation, decision or control, been convicted (anywhere in the world) for any of the offences listed below within the past five years?**

	Yes	No
Participation in a criminal organisation	<input type="radio"/>	<input type="radio"/>
Corruption	<input type="radio"/>	<input type="radio"/>
Fraud	<input type="radio"/>	<input type="radio"/>
Terrorist offences or offences linked to terrorist activities	<input type="radio"/>	<input type="radio"/>
Money laundering or terrorist financing	<input type="radio"/>	<input type="radio"/>
Child labour and other forms of trafficking in human beings	<input type="radio"/>	<input type="radio"/>

If you have answered yes to any of the offenses listed above, please provide further details.

- Grounds listed for the conviction
- Date of conviction
- Name of individual who has been convicted (if applicable)
- Background / Description
- Resolution / Outcome
- Measures taken to ensure this does not happen again

**2. Has your organisation been found to be in breach of obligations related to the payment of tax or social security contributions by a judicial or administrative decision? (In accordance with the legal provisions of the UK or the country in the organisation is established (if outside the UK)).**

- Yes  
 No

If you have answered yes to the above, please provide further details including:

Confirmation that payment has been made

Or

- Confirm that a binding arrangement has been entered into with a view to paying the outstanding sum

### Ground for Discretionary Exclusion

3. \* In the past three years, have any of the following situations applied to you, your organisation or any other person who has powers of representation, decision or control in the organisation?

	Yes	No
Breach of environmental obligations	<input type="radio"/>	<input checked="" type="radio"/>
Breach of social obligations	<input type="radio"/>	<input checked="" type="radio"/>
Breach of labour law obligations	<input type="radio"/>	<input type="radio"/>
Bankrupt or is the subject of insolvency or winding-up proceedings	<input type="radio"/>	<input checked="" type="radio"/>
Guilty of grave professional misconduct	<input type="radio"/>	<input checked="" type="radio"/>
Entered into agreements with other economic operators aimed at distorting competition	<input type="radio"/>	<input checked="" type="radio"/>
Shown significant or persistent deficiencies in the performance of a substantive requirement, which led to early termination of that prior contract, damages or other comparable sanctions?	<input type="radio"/>	<input checked="" type="radio"/>

### Modern Slavery Act 2015: Requirements under Modern Slavery Act 2015

4. Are you a relevant commercial organisation as defined by section 54 ("Transparency in supply chains etc.") of the Modern Slavery Act 2015 ("the Act")?

- Yes
- No

5. \* Are you compliant with the annual reporting requirements contained within Section 54 of the Act 2015?

- Yes
- No
- N/A

11. You will be asked to self-certify that your organisation has plans and policies in place and/or can commit to obtaining them if requested prior to the submission of a tender response to any given procurement.

### Company Policies

1. \* Please self-certify that your organisation has the following plans and policies in place and/or can commit to obtaining them if requested prior to the submission of your tender response to any given procurement via Constellia.

	Yes	No
Business Continuity	<input type="radio"/>	<input type="radio"/>
Equal Opportunities	<input type="radio"/>	<input type="radio"/>
Health and Safety	<input type="radio"/>	<input type="radio"/>
Quality Assurance	<input type="radio"/>	<input type="radio"/>

Complete

12. You will be required to self-certify that your organisation can commit to obtaining specific insurances if requested prior to the submission of a tender response to any given procurement.

## Insurances

**1. \* Please self-certify that your organisation can commit to obtaining the following insurances if requested prior to the submission of your tender response to any given procurement via Constellia**

	Yes	No
Employer's Liability	<input type="radio"/>	<input type="radio"/>
Public Liability Insurance	<input type="radio"/>	<input type="radio"/>
Professional Indemnity	<input type="radio"/>	<input type="radio"/>

Please note - Insurance levels are set by the Contracting Authority (CA) and / or Framework Agreement. These will relate to the services being delivered and may therefore differ for each opportunity.

Insurances required for each procurement will be set out in the project pack you receive from Constellia. Valid insurance certificates must be uploaded as part your tender submission. These certificates will be verified as part of the evaluation process.

It is a legal requirement for all companies to hold minimum levels of Employer's Liability and Professional Indemnity Insurances. This includes individual contractors working through their own Limited Companies but does not include Sole Traders.

Failure to provide the required insurances may result in disqualification for a live tendering opportunity.

[Complete](#)

13. Please also upload copies of current insurances held by your organisation.

### Professional Indemnity Insurance (minimum £1million) \*

[Upload Document](#)

### Public Liability Insurance (minimum £5million) \*

[Upload Document](#)

### Employers Liability Insurance

[Upload Document](#)

14. Please indicate the category or categories that your organisation intends to deliver against.

### Category Selection

Submitted: 19/01/2021

**1. \* Please select which categories your organisation intends to deliver against:**

- Asset Management
- Business strategy
- Change Management
- Construction, Design & Engineering
- Cyber Security
- Education, Learning and Curriculum
- Environmental Health and Consumer Protection
- Environment, Sustainability and Waste
- Facilities Management and Catering
- Finance, Audit and Accounting
- Health & Wellbeing
- Highways & Transport
- Housing and Community
- Law Enforcement Services
- Legal
- Leisure, Culture and Heritage
- Marketing, Media and Communications
- Organisational Support
- Planning and Development Control
- Procurement
- Safeguarding
- Social Care (Adults & Children)
- Social Value and Regeneration
- Technology

15. Please input your organisations bank details.

**1. \* Account Number**

**2. \* Sort code**

**3. \* Account Type**

**4. \* Exact name as it appears on your account**

## ONBOARDING FEEDBACK

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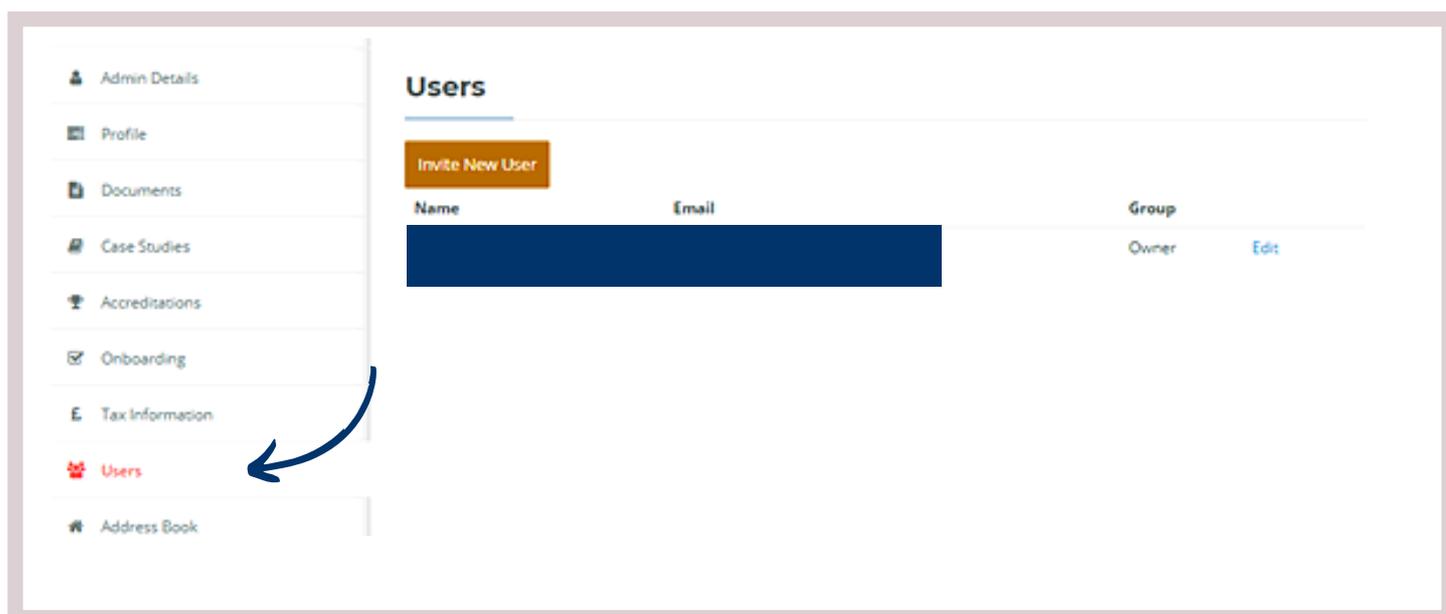
16. Once all stages are completed, Constellia will review the information and approve or provide feedback accordingly. The Service Provider Agreement will be approved as the final stage of your onboarding once all other steps are approved and complete. You will also receive a countersigned copy of the Service Provider Agreement. If Constellia require further information, Service Providers will be notified via email and you can re-submit any information as required.

**Service providers will need to be fully onboarded before they can start to receive tendering opportunities via the system.**

## ADDITIONAL USERS

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17. Service providers can have multiple user profiles attached to their account. The user/email address that is used to onboard as a Constellia service provider will be the 'owner' who will then be able to invite additional users. To do this click on the 'Account' button in the top right-hand corner, then select the 'Users' tab and 'Invite New User'. Owners can also remove users as appropriate.



For further advice and support you can contact a member of the Constellia team by pressing the help button and then contact us. You can also email us at [support@constellia.com](mailto:support@constellia.com)

