

UVM New Supplier Request

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Background and Overview

The New Supplier Request form allows users to submit a request within PeopleSoft for a new supplier, when needed to create a requisition or submit a check request.

Note: Users should thoroughly review the list of existing suppliers prior to submitting a New Supplier Request form. You can use the query UV_SUPPLIER_LOOKUP to look up existing suppliers. When using the UV_SUPPLIER_LOOKUP, you should use a wildcard (%) on either end of the search criteria. Also, to maximize your search, use minimal criteria. For example, when searching for Black Mountain Mechanical enter %Black% in the Supplier Name prompt field.

- Departments or agencies of the State of Vermont are listed part of the State of Vermont supplier (supplier #0000000700).
- Departments or centers of the University of Vermont Medical Center (UVM MC) are listed as part of that supplier (supplier #000000697).

Required Fields

There is a set of data that is necessary to create a new supplier in PeopleSoft. The following fields are required to complete the New Supplier Request Form:

Requestor Information:

- * Net ID
- * Preferred name
- * Phone Number
- * Email Address

Supplier Information:

- * Supplier Name
- * EIN Type
- * EIN
- Contact Name
- * Contact Phone Number
- * Address Line 1
- * Country
- * City
- * Postal Code

If you are only collecting an IRS W9, you will also need to collect the Contact Name and Contact Phone Number. **The form cannot be submitted without this information**.

Access the New Supplier Request

Access to the New Supplier Request form in the **eProcurement Homepage** tile or in the UVM Business Manager WorkCenter tile under Links, Purchasing & Accounts Payable. Access is granted to those individuals who create requisitions.

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New Supplier Request Instructions

Create a New Supplier Request

- Log in to <u>PeopleSoft Financials</u>
- On the **UVM Employee** Homepage click the **eProcurement** tile



Click the UVM New Supplier Request



Other navigation option:

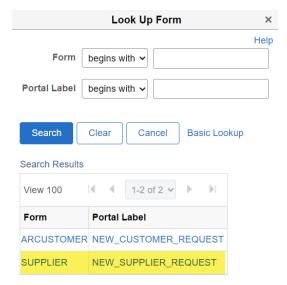
- UVM Business Manager WorkCenter, Purchasing & Accounts Payable, New Supplier Request Form.
- NavBar Menu: Employee Self-Service, Procurement, New_Supplier_Request
- Click the Add a New Value Tab
- Use the Lookup to select SUPPLIER. Press the magnifying glass to search for the New Supplier Request.

Search/Fill a Form



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Select Supplier – New Supplier Request



If a user has access to only one of the forms, the selection screen will not appear.

Instructions tab contains a variety of information regarding the New Supplier Form, searching for suppliers, using international suppliers, and required attachments.



NEW_SUPPLIER_REQUEST

Before using this form ensure that the supplier you are requesting does not already exist. Use the <u>Supplier Lookup query</u> to look up suppliers by name or address. In some cases, suppliers are inactivated due to outdated information. You can contact <u>supplier@uvm.edu</u> with questions.

Payments to international suppliers:

Supplier setup can be requested through the New Supplier Request Form.

- If purchasing supplies / materials/ or tangible assets, a Requisition can be processed.
- If purchasing services, a Check Request Form must be processed through Tax Services (<u>taxadmin@uvm.edu</u>).

Please review the following documents regarding payments to international suppliers.

- Payments to Foreign Nationals and Entities: https://www.uvm.edu/sites/default/files/UVM-Policies/policies/nonresidentaliens.pdf
- Paying Foreign Nationals & Entities flowchart & checklist: https://legacy.drup2.uvm.edu/sites/default/files/Division-of-Finance/tax/paying_foreign_nationals.pdf
- IRS Form W-8Ben for individuals: https://www.irs.gov/pub/irs-pdf/fw8ben.pdf
- IRS Form W-8Ben-E companies and organizations: https://www.irs.gov/pub/irs-pdf/fw8bene.pdf

Form tab: Enter all of the information requested

- Required fields have an asterisk
- . *Subject box: input new supplier name and your netID
- Priority / Due Date: The Disbursement Center processes the requests in the order we receive them.
- Supplier Name type: first name last name. Example: Charles Catamount
- Choose EIN Type from drop down list either Social Security Number or Employer Identification number
- No dashes in the Supplier EIN
- Spell out all information for address, city names.

Attachment tab: Attach all supporting documentation such as:

- New Supplier W-9
- ACH Enrollment Form

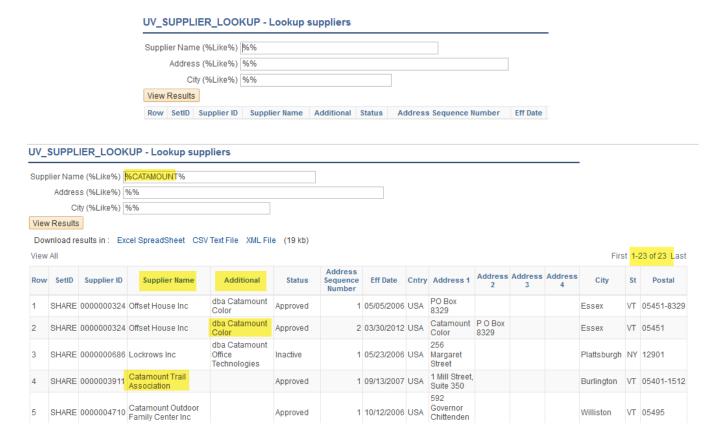
An attachment of a UVM New Supplier Form or IRS W-9 is required. The UVM New Supplier Form is preferred, as it collects contact information that is absent from the IRS W-9.

The attachments must be saved to a secure location before it can be uploaded to the New Supplier Form.

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1. A link to the Supplier Lookup query to search for existing suppliers. Make sure to thoroughly check that the supplier being requested does not already exist. If it does exist but the status is inactive, contact supplier@uvm.edu to determine what additional information may be required to reactivate the supplier.

Below is a screen shot of the query, search fields, and sample results:



Note that using the percent sign before and after a key word provides a list of the suppliers with that word anywhere in the Supplier Name or Additional Information (generally DBA doing business as).

If you find the desired vendor in the query output, note the supplier number. You do not need to proceed with the new supplier request. You can use that supplier number on a requisition or check request. If the supplier is inactive, do not use the New Supplier Request Form. Email supplier@uvm.edu with a request to re-activate the supplier along with a new Supplier Form / W-9.

2. Links to some of the required forms. If you currently do not have a <u>New Supplier W-9 Form</u> or an <u>IRS W-9</u> for the supplier, then you can save your PeopleSoft Supplier form and submit once the completed New Supplier form is received and attached. All suppliers require a W-9. These forms are also included as downloadable templates on the Attachments tab.

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- A UVM New Supplier W-9 Form will provide all information required by this form. An IRS W-9 will not, and you will need to gather additional information to complete the entry.
- 3. Contact link for supplier@uvm.edu. If you have any questions, you can contact the supplier email and they will be able to assist you.

Form tab is used to enter the UVM contact and supplier information. Note: any field with an asterisk (*) is required.

1. Subject – Enter the name of the supplier (first name last name) and your netID. This is how you will differentiate between your requests and search for them in the future.



- 2. Requester's Info this is required so the Disbursement Center will know who to contact.
 - i. *Net ID –Net ID of the person requesting the new supplier, this should be a UVM employee who can provide additional information regarding the supplier.
 - ii. *Name Name of the person requesting the supplier.
 - iii. *Phone Number Preferred contact phone number for the person requesting the supplier.
 - iv. *E-mail Address UVM e-mail address of the person requesting the supplier.

Requester Information:



- 3. New Supplier Info *Do not use any abbreviations in the address information*. All information can be found on the New Supplier. If you use the IRS W-9 Form you will need to collect additional information, as outlined on page 2.
 - i. *Supplier Name the supplier's legal name. (30 character limit)
 - ii. Dba the business name that the supplier uses if different from their legal name.
 - iii. *EIN Type Employer Identification Number Select:
 - EIN employer identification number (for businesses or companies)
 - SSN social security number for an individual
 - Tax Identification Number (provided by the IRS to nonresident aliens)

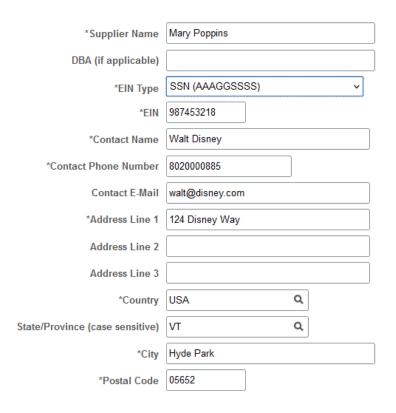
iv. EIN – enter number with no spaces or dashes

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- v. *Contact Name the name of the primary contact for the supplier
- vi. *Contact Phone # the primary contact's phone number
- vii. Contact E-mail the primary contact's email address
- viii. *Address Line 1 address for the supplier (number, street, and apt/suite)
 - ix. Address Line 2 additional address line as needed
 - x. Address Line 3 additional address line as needed
- xi. *Country use capital letters
- xii. *State/Provinces use capital letters
- xiii. *City
- xiv. *Postal code

Supplier Information:



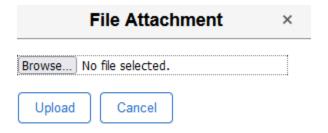
Scroll to the bottom of the page and press the Save button. You must save the form before attaching supporting documentation.

Attachments Tab

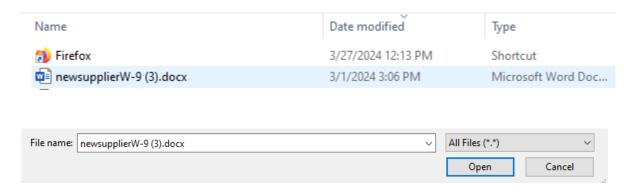
New Supplier Form or W-9 MUST be attached to process request.

- 1. Includes downloadable templates for the required and suggested forms.
- Click the Attach button to attach your supporting documentation.
 Note: If the button is greyed out then you must save your form before proceeding. Click on the Form tab to return to the form then click Save.
- 3. Click Browse...

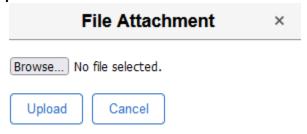
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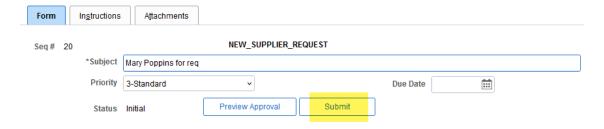
4. Choose the file from your computer to be attached. Then click **Open.**



5. Click Upload

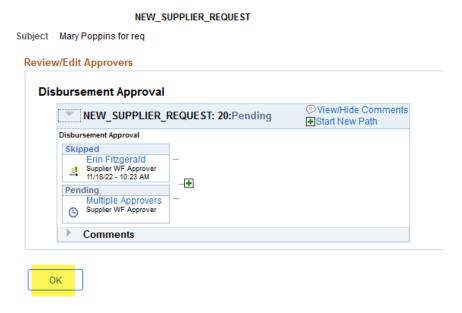


- 6. To add additional attachments, click **the Add Icon** $\stackrel{+}{-}$ and repeat steps b through e above.
- 7. When you have completed your form click **Submit** on the Form tab.



The next screen will display the approval routing. Press the OK button.

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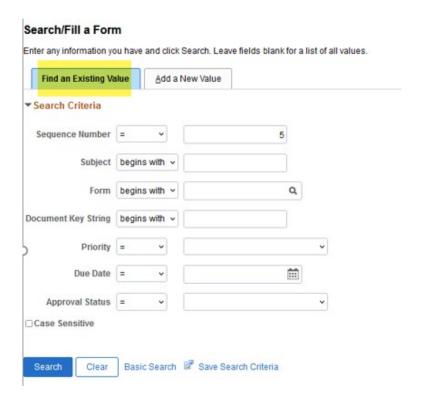
On the Form tab, there is the option to Cancel the Approval (for example, an attachment needs to be added). You can also check on the Approver Status.



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Find An Existing Value

You can research the status of the New Supplier Requests by using the Find an Existing Value tab. Press the Search button and your New Supplier Requests will be displayed and show the approval status.



This screenshot displays pending supplier requests.



You will receive a PeopleSoft system generated email for that form has been processed and the supplier is pending final approval. Disbursement will proceed with the completion of the request.

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This screenshot displays approved supplier requests, with the new PeopleSoft supplier number. Use this supplier number on your requisitions and check requests.

You will receive a PeopleSoft system generated email for either an approval or denial of the request. If the request is denied, it can be corrected and resubmitted.



Supplier Status – Another way to check on new supplier requests is to utilize the New Supplier Request pivot grid. Navigation in the Business Managers Workcenter, Queries, PurCard & Purchasing Queries, click Supplier Status. This opens the pivot grid and displays both summary and detail information.



Instructions to add this tile to one of your pages are in the video at 9 minutes.

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Frequently Asked Questions

I received a notification about my supplier. Now what?

The first email you would receive is a system generated message stating that the supplier is being processed and is pending final approval. You can find the new supplier number in PeopleSoft on the New Supplier Request Form page, Find an Existing Value tab. Also, there is be a supplier pivot grid where you can check for more information.

How will I know when the new supplier has been approved?

You will receive an automated email notification when the request is pending approval. This is the first step in creating the supplier. Disbursement needs to complete additional steps to set up the supplier. You can find the new supplier number in PeopleSoft on the New Supplier Request Form page, Find an Existing Value tab.

How do I find the new supplier number?

Once Disbursement has completed the supplier approval process, you can see the new supplier number in the Find an Existing Value, Document Key String. The numeric value is the new supplier number. For example, 0000057473 is the new supplier number in Sequence Number 5.



Why did my new supplier request get denied?

Reasons for denying or sending back include:

- Failed TIN match the Disbursement Center confirms with the IRS that a name (personal or business) matches the EIN / SSN / TIN given.
 - o The individual's name and social security number don't match the IRS.
 - The company's name and TIN don't match the IRS.
- No attachment (all new supplier requests must have a current <u>IRS W9</u> or <u>UVM New Supplier W-9 Form</u> attached).
- Supplier already exists.
- There is no contact information.

If the request is denied, it can be corrected and resubmitted.

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My new supplier request was denied. What do I do now?

Instructions for correction will be included in the email that you receive. Steps may include:

- Obtain a new W-9 / New Supplier Form with a valid TIN / SSN
- Attach a missing New Supplier Form
- Use the existing vendor number which was supplied in the email.
- If the request is denied, it can be corrected and resubmitted.

What are the statuses that a Supplier Request can have?

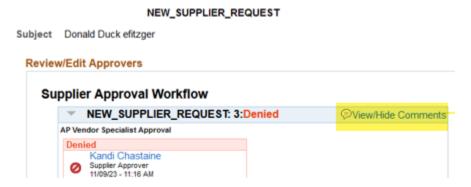
- Initial form is initiated
- Pending after form submission
- Approved supplier has been created in PeopleSoft and has a new supplier number assigned.
- Denied form sent back for stated reasons.

Finding Approver Comments

On the Form tab of your completed request, Click the Approver Status button.



This example shows that the request was denied, and the View / Hide Comments bubble shows lines, which means there is a comment. Click on the View / Hide Comments link.



The message is displayed.

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Resources/Help

Help/Footprints

If you have questions about information in this document, or, if after reading it, you cannot find the information you need, please submit a PeopleSoft help desk ticket in <u>Footprints</u>.

Relevant UVM Policies and Procedures

- University Procurement Policy
- University Policies and Operating Procedures

Training

- Supplier Form training video 10 minutes
- UFS Roadshow Training Topics (PDF)
- Professional Development & Training Classes

Relevant UVM Departments

- Disbursement Center
- Purchasing Services
- University Financial Services

Suggestions? Updates?

Send an email to <u>PS9-1Upgrade@uvm.edu</u>

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