



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 #0000000697).

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.



New Supplier Request Instructions

Create a New Supplier Request

- Log in to [PeopleSoft Financials](#)
- 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

*Form



- Select Supplier – New_Supplier_Request

Look Up Form ×
Help

Form begins with ▼

Portal Label begins with ▼

Search
Clear
Cancel
Basic Lookup

Search Results

View 100
◀ ◀
1-2 of 2
▶ ▶

Form	Portal Label
ARCUSTOMER	NEW_CUSTOMER_REQUEST
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.

Form
Instructions
Attachments

NEW_SUPPLIER_REQUEST

Before using this form ensure that the supplier you are requesting does not already exist. Use the [Supplier Lookup query](#) to look up suppliers by name or address. In some cases, suppliers are inactivated due to outdated information. You can contact supplier@uvm.edu 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 (taxadmin@uvm.edu).

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.



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:

UV_SUPPLIER_LOOKUP - Lookup suppliers

Supplier Name (%Like%)

Address (%Like%)

City (%Like%)

[View Results](#)

Row	SetID	Supplier ID	Supplier Name	Additional	Status	Address Sequence Number	Eff Date
-----	-------	-------------	---------------	------------	--------	-------------------------	----------

UV_SUPPLIER_LOOKUP - Lookup suppliers

Supplier Name (%Like%)

Address (%Like%)

City (%Like%)

[View Results](#)

Download results in : [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (19 kb)

View All First **1-23 of 23** Last

Row	SetID	Supplier ID	Supplier Name	Additional	Status	Address Sequence Number	Eff Date	Cnty	Address 1	Address 2	Address 3	Address 4	City	St	Postal
1	SHARE	0000000324	Offset House Inc	dba Catamount Color	Approved	1	05/05/2006	USA	PO Box 8329				Essex	VT	05451-8329
2	SHARE	0000000324	Offset House Inc	dba Catamount Color	Approved	2	03/30/2012	USA	Catamount Color	P O Box 8329			Essex	VT	05451
3	SHARE	0000000686	Lockrows Inc	dba Catamount Office Technologies	Inactive	1	05/23/2006	USA	256 Margaret Street				Plattsburgh	NY	12901
4	SHARE	0000003911	Catamount Trail Association		Approved	1	09/13/2007	USA	1 Mill Street, Suite 350				Burlington	VT	05401-1512
5	SHARE	0000004710	Catamount Outdoor Family Center Inc		Approved	1	10/12/2006	USA	592 Governor Chittenden				Williston	VT	05495

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 [New Supplier W-9 Form](#) or an [IRS W-9](#) 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.



- 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.

Form	Instructions	Attachments
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Seq # 9 NEW_SUPPLIER_REQUEST

*Subject

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:

*Net ID	<input type="text" value="efitzger"/>
*Preferred Name	<input type="text" value="Erin Fitzgerald"/>
*Phone Number	<input type="text" value="656-1382"/>
*E-Mail	<input type="text" value="erin.fitzgerald@uvm.edu"/>

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. Db a – 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



- 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:

*Supplier Name

DBA (if applicable)

*EIN Type ▼

*EIN

*Contact Name

*Contact Phone Number

Contact E-Mail

*Address Line 1

Address Line 2

Address Line 3

*Country 🔍

State/Province (case sensitive) 🔍

*City

*Postal Code

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.
2. 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...**



File Attachment ×

Browse... No file selected.

Upload
Cancel

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

Name	Date modified	Type
Firefox	3/27/2024 12:13 PM	Shortcut
newsupplierW-9 (3).docx	3/1/2024 3:06 PM	Microsoft Word Doc...

File name: newsupplierW-9 (3).docx
All Files (*.*)

Open
Cancel

5. Click **Upload**

File Attachment ×

Browse... No file selected.

Upload
Cancel

6. To add additional attachments, click **the Add Icon** and repeat steps b through e above.

7. When you have completed your form click **Submit** on the Form tab.

Form

Instructions

Attachments

Seq # 20 NEW_SUPPLIER_REQUEST

*Subject Mary Poppins for req

Priority 3-Standard Due Date 📅

Status Initial Preview Approval Submit

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



NEW_SUPPLIER_REQUEST

Subject Mary Poppins for req

Review/Edit Approvers

Disbursement Approval

NEW_SUPPLIER_REQUEST: 20:Pending [View/Hide Comments](#) [+ Start New Path](#)

Disbursement Approval

Skipped

Erin Fitzgerald
Supplier WF Approver
11/18/22 - 10:23 AM

Pending

Multiple Approvers
Supplier WF Approver

Comments

OK

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.

Form Instructions Attachments

Seq # 20

NEW_SUPPLIER_REQUEST

*Subject Mary Poppins for req

Priority 3-Standard

Due Date

Status Pending

Approver Status

Cancel Approval



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.

Search/Fill a Form
Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value | Add a New Value

Search Criteria

Sequence Number =

Subject begins with

Form begins with

Document Key String begins with

Priority =

Due Date =

Approval Status =

Case Sensitive

Search | Clear | Basic Search | Save Search Criteria

This screenshot displays pending supplier requests.

Search Results

View All 1-2 of 2

Sequence Number	Subject	Form	Document Key String	Priority	Due Date	Approval Status	Created Date/time
52	T Selleck efitzger	SUPPLIER	(blank)	3-Standard	(blank)	Pending	04/21/2023 2:54PM
53	Mary Poppins efitzger	SUPPLIER	(blank)	3-Standard	(blank)	Pending	04/21/2023 3:44PM

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.



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.

Search Results

View All 1-8 of 8

Sequence Number	Subject	Form	Document Key String	Priority	Due Date	Approval Status	Created Date/time
5	testing testing 1 2 3	SUPPLIER	SHARE/0000057473	3-Standard	(blank)	Approved	10/11/2022 1:39PM
6	testing testing 234	SUPPLIER	SHARE/0000057474	3-Standard	(blank)	Approved	10/11/2022 2:12PM

Sequence Number	Subject	Form	Document Key String	Priority	Due Date	Approval Status	Created Date/time
3	Donald Duck efitzger	SUPPLIER	(blank)	3-Standard	11/10/2023	Denied	11/09/2023 10:17AM

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.



Number	Subject	Status	Submit By	Submitted Date	Last Upd User	Last Upd DtTm	Supplier ID	Supplier Status
14	TEST New email	Approved	tjbarker	2024-03-22-13:33:07.000000				
15	Blue Man Group, tjbarker	Pending Approval	tjbarker	2024-03-22-15:52:46.000000				
4	INITIAL TEST	Approved	tjbarker	2024-02-23-11:29:51.000000	lboomhov	2024-02-23-11:31:17.000000	0000060014	Unapproved

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



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.

Search Results

View All 1-8 of 8

Sequence Number	Subject	Form	Document Key String	Priority	Due Date	Approval Status	Created Date/time
5	testing testing 1 2 3	SUPPLIER	SHARE/0000057473	3-Standard	(blank)	Approved	10/11/2022 1:39PM
6	testing testing 234	SUPPLIER	SHARE/0000057474	3-Standard	(blank)	Approved	10/11/2022 2:12PM

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.
 - 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 [IRS W9](#) or [UVM New Supplier W-9 Form](#) attached).
- Supplier already exists.
- There is no contact information.

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



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.

The screenshot shows the 'Form' tab selected in a navigation bar. Below the navigation bar, the form details are visible: Seq # 3, Subject: Donald Duck efitzger, Priority: 3-Standard, and Status: Denied. The 'Approver Status' button is highlighted in yellow, along with the 'Preview Approval' and 'Submit' buttons. A 'Due Date' field is also present but empty.

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 screenshot shows the 'Review/Edit Approvers' section. Under the heading 'Supplier Approval Workflow', there is a dropdown menu showing 'NEW_SUPPLIER_REQUEST: 3:Denied'. To the right of this dropdown is a yellow 'View/Hide Comments' button. Below this, the 'AP Vendor Specialist Approval' section shows a 'Denied' status with a red 'X' icon. The approver is identified as Kandi Chastaine, Supplier Approver, with a timestamp of 11/09/23 - 11:16 AM.

The message is displayed.



Denied
Kandi Chastaine
Inserted Approver
11/09/23 - 11:16 AM

Comments
Kandi Chastaine at 11/09/23 - 11:16 AM
W9 does not have a real footprint for a signature :)

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 [Footprints](#).

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 PS9-1Upgrade@uvm.edu