Today’s Agenda

• What is Supplier Onboarding
• Supplier Liaisons
• Searching for a Supplier in PeopleSoft
• Invitation Letters
• My System Profile – Business Email Check
• User ID and Password Update
• New Supplier Registration Template Letter
• Self-Service Portal
  – Supplier Onboarding Form
  – Registration/ Approval Workflow
  – New User ID Request Template Letter
  – User ID Request
  – Change Request
• Cash Custodians
• New Student Reimbursement Process
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What is Supplier Onboarding

- An online supplier registration system that will give potential suppliers access to self-service registration and change requests through a supplier portal in Finance PeopleSoft.

- **This new self-service portal will allow:**
  - Potential suppliers to register
  - Current suppliers to request a User ID
  - Registered suppliers to complete a change request

- Provides specific forms for domestic (business/individual) and international (business/individual) suppliers

- The system will include email notifications and approvals at the department and Supplier Team levels.

- Go live date was Monday **July 27, 2020**.
Supplier Liaisons

Supplier Liaisons will be responsible for:
• Determining if a supplier is already in our system
• Sending the link to the Supplier Portal in an email invitation to potential and current suppliers
• Approval of Supplier Registration at department level
• Being familiar with the Registration and Change Request forms
• First level of contact for all initial supplier set up and their questions
Searching for a Supplier in Peoplesoft

**Navigation:** Main Menu > Suppliers > Supplier Information > Add/Update > Review Suppliers

**Step 1:** Navigate to the Review Suppliers Page in Peoplesoft and search to determine if your supplier is in the system.

**HELPFUL TIP** – The most efficient way to search is by ID Type if you have the SSN or FEIN. If you do not have this, search by Name and Change Name “Equals” to “Contains” and search by a portion of the name.

**Step 2:** If necessary, click View All to see all results.
There are 2 invitation letters. Which one should I send?

**Step 3:** If supplier is found, follow step 3a below.
If supplier is not found, follow step 3b below.

**Step 3a:** View supplier status. If it’s **Approved:** Send the Supplier ID and the User Account Request Letter **ONLY** to the supplier if they need to make an update to their profile. If they do not need to make an update to their profile, proceed to enter the payment request or purchase requisition.

If it’s **Inactive:** Request that the supplier send an updated W9 (for U.S. suppliers), W-8BEN-E (for foreign business/entity suppliers), or W-8BEN or 8233 (for foreign individuals) to APSupplr@mailbox.sc.edu. Once the profile is approved by the Supplier Team, follow the *If it’s Approved* procedure above.

**Step 3b:** Send the New Supplier Registration Letter **ONLY** and your Peoplesoft email address to the supplier so that the submitted registration can be routed to you for approval. Click [HERE](#) to view instructions on how to ensure your email address is set up in Peoplesoft so that registrations can be routed to you for approval.

**HELPFUL TIP** – The link to the portal is in the User Account Request Letter as well as the New Supplier Registration Letter. If the link does not launch in the supplier’s default browser, please instruct them to use one of the following: *Microsoft Edge, Internet Explorer, Safari, or Firefox*. If the link still does not launch, please instruct them to close all browsers, clear cache, and relaunch the portal from the link above in this letter. For instructions on how they can clear cache for any browser, please click [here](#).
Navigation: Main Menu > My System Profile

1. **Workflow Attributes** – check both Email User and Worklist User, giving you the option to approve Supplier registrations both ways.

2. **Business Email** – Be sure to have your **business** email populated here as the primary email account. All supplier related emails will go to this specific email.

3. **Save Changes** – Click the Save button to save all changes made on this page.
New Supplier Registration Invitation Letter

Dear Valued Supplier,

The University of South Carolina is inviting you to register to become a supplier!

You are receiving this email because you have been identified as a potential supplier by me, your UCSC Supplier Liaison.

We have implemented an online Supplier Portal in PeopleSoft providing potential suppliers access to a secure self-service system where they can:

- Register online to become a supplier with UCSC
- Manage supplier information, such as addresses, contacts, and payment information

To register with UCSC to become a new supplier, please click here.

WEB BROWSER TIP: If the link does not launch in your default browser, please try using one of the following browsers: Microsoft Edge, Internet Explorer, Safari, or Firefox. If the link still does not launch, please close all browsers, clear cache, and relaunch the portal from the link above in this letter. For instructions on how to clear cache for any browser, please click here.

HOW TO GET STARTED: Once you have launched the link, on the Supplier Home Page, click the User Registration Tile and select a Supplier Request Form based on whether the supplier is Domestic (U.S.) or International (Non-U.S.). For step-by-step instructions on how to complete the registration, please see HELPFUL TIP on the welcome step of the registration. After the registration has been approved, you will receive two separate emails. One email will contain your user ID and the second email will contain your supplier ID. You will use the user ID along with your password created during the registration process to sign in and maintain your supplier information going forward.

VERY IMPORTANT: You will create your password during the registration process. You will need to make note as it will not be emailed to you for security reasons. The User ID will be emailed to you and will be required when signing in to update supplier information.

ACCESSING YOUR ACCOUNT: Upon approval of your registration, you will receive an email notifying you of such. In some cases, an additional approval is needed, and you may not be able to access your account until this is complete. This usually takes no more than 2 business days AFTER the registration is approved.

Thank you for your partnership and please contact me, your Supplier Liaison, if you have additional questions.

Your UCSC Supplier Liaison,

Add your name here
Supplier Onboarding Self-Service Portal

Potential Suppliers will use the URL sent to them by the Supplier Liaison to enter the self-service portal where they will complete a User Registration form.

Current Suppliers will use the self-service portal to request a User ID within the User Registration tile and/or Sign In to make a change request within the Manage Supplier Information tile.

Use the Supplier Homepage to access various pages on the portal, by clicking a tile.
Supplier Registration Form

Use the Supplier Registration Request form to enter the details to register as a Supplier. You will need your Tax Identification Number (US or Foreign) and electronic copies of a W-9, W-8BEN-E, W-8BEN, or 8233 in order to register. Select a form based on whether the supplier is Domestic or International.

Domestic Supplier Request

Are you a new supplier? Register here as a U.S. (Domestic) supplier.

Before you begin the domestic supplier registration process you will need the following:
- Electronic copy of current signed W-9
- Tax ID number (SSN or FEIN)
- ACH (Direct Deposit) bank routing and account number

Note: For suppliers that are Individuals/Sole Proprietors and operate under their own names, please include your middle initial after your first name as there can be many payees with the same first and last name. Example: John D Smith.

Register now

International Supplier Request

Are you a new supplier? Register here as a foreign (International) supplier.

Before you begin the international supplier registration process you will need the following:
- Electronic copy of current signed W-8BEN-E (entities) or W-8BEN or 8233 (individuals).
- If applicable, U.S. Tax ID number: FEIN (entities) and SSN or ITIN (individuals).
- Foreign Tax ID number

Register now
Approval Workflow

• All new Supplier Registrations will be approved at the Department level and then a final approval made at the Supplier Team level.
• Departments are responsible for denying the registration if they are not familiar with the supplier or do not intend to do business with the supplier.
• Departments will not request more information, only the Supplier Team will Request More Information.
• All new User ID Requests will be approved. These Suppliers are current UofSC suppliers that need access to the self-service portal to make changes to the information already in the system.
Supplier Approval - Department

**Navigation:** Main Menu > Worklist or Click the link in the email (Just be sure to log in to Finance PeopleSoft before clicking the link)

Use the **Manage Request Approval** page to manage approvals for registration of new suppliers.
Dear Valued Supplier,

You are receiving this email because you requested to make updates or changes to supplier information currently in our system, such as addresses, contacts, and/or payment information. To make these changes, you will need to request a User ID.

To request a User ID, please click here.

**WEB BROWSER TIP:** If the link does not launch in your default browser, please try using one of the following browsers: Microsoft Edge, Internet Explorer, Safari, or Firefox. If the link still does not launch, please close all browsers, clear cache, and relaunch the portal from the link above in this letter. For instructions on how to clear cache for any browser, please click here.

**HOW TO GET STARTED:** Once you have launched the link, on the Supplier Home Page, click the User Registration Tile and select a User ID Form based on whether the supplier is Domestic (U.S.) or International (Non U.S.). To request a User ID, you will need your Supplier ID and Tax Identification Number. Once you have successfully submitted your user ID request, you will receive an email providing your user ID. You will use this with your password created during the user ID request process to sign-in and maintain your supplier information going forward. Once you have your login credentials, click on the Sign In Tile from the Supplier Home Page. After signing in, click on the Manage Profile Tile and select the Change Request Form based on whether the supplier is Domestic (U.S.) or International (Non-U.S.). For step-by-step instructions on how to complete the change request, please see HELPFUL TIP on the welcome step of the change request.

**VERY IMPORTANT:** You will create your password during the registration process. You will need to make note as it will not be emailed to you for security reasons. The User ID will be emailed to you and will be required when signing in to update supplier information.

Thank you for your partnership and please contact me, your Supplier Liaison, if you have additional questions.

Your USC Supplier Liaison,

Add your name here
Supplier User ID Request

Navigation: Supplier Home Page > User Registration > Domestic/International User ID Request

Use the USER ACCOUNT Request for Current Suppliers form to receive a new user ID and/or request additional user IDs for individuals in your organization. You will need your Supplier ID and Tax Identification Number in order to create a new User Account. Select a form based on whether the supplier is Domestic or International.
Supplier Change Request

To create a **Supplier Change Request**, all registered Suppliers will be required to **Sign In**.

To receive a User ID and Password, a potential supplier will need to register while a current supplier will need to request a User ID.
Supplier Change Request

Navigation: Supplier Home Page > Manage Supplier Information > Domestic/International Change Request

Use the **Supplier Change Request** form to start a new supplier change request or select an existing request to continue the request process. Select a form based on whether the supplier is **Domestic** or **International**.

![Supplier Change Request Form](image_url)
A **Cash Custodian Supplier** is any employee that needs a cash advance or is a custodian for a petty cash and/or change fund. This form is also to be used for students needing a travel advance.

The current process is still in effect. Complete the form and email to apsupplr@mailbox.sc.edu. Be sure to include support documentation.

- **Employee or Student Information** – Ensure this is a UofSC mailing address.
- **Select the type of custodian.**
- **Complete only for petty cash and change fund custodians.**
- **Department Information** – Department Contact, Department Approval and date.
New Student Reimbursement Process

Student Non-employees
• Student non-employees will no longer be setup up as a supplier in PeopleSoft. Instead, departments will use a new Student Reimbursement form for any reimbursements to student non-employees and send these forms to Accounts Payable using the AP Upload mailbox, apupload@mailbox.sc.edu. Accounts Payable will then enter these reimbursements into PeopleSoft as a single pay supplier.
• For reportable expenses such as stipends and fellowships, students will be required to use the new Supplier Onboarding self-service portal to register as a supplier to receive a supplier ID. The department will then use Payment Request for payment.

Student Employees
• For all non-travel expenses, use the Travel and Expense module to reimburse student employees for expenses related to the work they do at the University.
**New Student Reimbursement Form**

**Controller's Office**
Student Reimbursement Form

**Date:**

**Legal Name:**

**USC ID:**

**Mailing Address Line 1:**

**Mailing Address Line 2:**

**City, State & Postal Code:**

**Amount**

**PART I: Description of Reimbursement**

**PART II: Summary of Receipts/USC Chartfield**

Attach all itemized receipts associated with this request. Food memo required for charges to 53005.

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Total Charges: 0

**PART III: AP Upload Approval:**

Department Contact (Name, Email, Phone):

Department Approval and Date:

Please email the completed Student Reimbursement Form and supporting documentation to: APUpload@mailbox.sc.edu
Where to Find Resources

Supplier Management
Supplier Management is a unit of the Controller's Office that manages supplier setup in accordance with university policies and procedures.

Supplier Management Services
Our team facilitates supplier setup and management of all university suppliers.

Supplier Onboarding
As of July 27, 2020, the University of South Carolina implemented a supplier self-service onboarding portal. Please use the job aids below to assist in navigating the portal.

- Introduction to the Supplier Self-Service Portal [pdf]

Domestic Supplier Job Aids and Demo Videos
- Registering as a Domestic Business Supplier [pdf]
- Registering as a Domestic Business Supplier Demo Video
- Registering as a Domestic Individual Supplier [pdf]
- Registering as a Domestic Individual Supplier Demo Video
- Requesting a New User ID [pdf]
- Requesting a Change for a Domestic Business/Individual Supplier [pdf]

International Supplier Job Aids and Demo Videos
- Registering as an International Business Supplier [pdf]
- Registering as an International Business Supplier Demo Video
- Registering as an International Individual Supplier [pdf]
- Registering as an International Individual Supplier Demo Video
- Requesting a New User ID [pdf]
- Requesting a Change for an International Business/Individual Supplier [pdf]

Supplier Types

Supplier Forms and Instructions

Supplier Liaison FAQs
Contact Information

If you have questions or concerns, please reach out to apsuppllr@mailbox.sc.edu.
Questions