Supplier Onboarding FAQs
Supply Chain Services

RESOURCES
Onboarding Tutorial  End User’s Process
Supplier Registration Steps  Supplier’s Process

PROCUREMENT TYPES – WHEN DO I INITIATE A PURCHASE REQUISITION VERSUS A CHECK REQUEST, PCARD, OR PAY OUT OF POCKET?
Check the Payment Matrix for the commodity and corresponding payment types. If your commodity isn’t listed contact Elsa Liauwapau at eliauwapau@miami.edu

NEW REQUESTS - HOW DO I ADD A SUPPLIER TO WORKDAY?
If the supplier does not appear in Workday or UMarketplace with a green checkmark and P-number, initiate a New Supplier Request in Workday. Contact the supplier for the information below. An email notification containing a RITM# will be sent to the UM employee that submitted the New Supplier Request. Keep this for reference.
• For the person that will complete the application, obtain their full name, phone number and email address. Note if this initial contact forwards the invite, the link will become invalid.
• Has anyone at the company has been an employee at the University of Miami in the last 12 months?
• Is the company a physician or immediate family member of a physician?

INACTIVE SUPPLIERS - WHAT IF THE SUPPLIER IS MARKED AS “INACTIVE”?
If a supplier is marked as “Inactive” check the Supplier Summary in UMarketplace under “Workflow and Review” “Internal Notes.” Contact supplychain.supplierapp@miami.edu for more information.

TIMEFRAME - HOW LONG DOES IT TAKE THE SUPPLIER TO APPEAR IN WORKDAY?
• Once the New Supplier Request form has been completely approved, the invitation to onboard is sent to the supplier. The invite can take 1-2 days of processing before being sent to the supplier.
• An email invite from umiami@sciquest.com is sent to the supplier for them to complete the online registration. The supplier can complete the application in as little as 15 minutes. Once the supplier completes all information correctly and the application is approved by UM, the upload can appear in Workday the same day.
• After the invite is sent to the supplier, the period for uploading as a valid UM supplier is completely dependent on the supplier completing application.

INSURANCE - DO ALL SUPPLIERS NEED INSURANCE?
• The supplier can contact Risk Management at (305) 284-3163, or email (riskmanagement@miami.edu) their questions regarding specific requirements. Otherwise, Risk Management has standard insurance requirements. To view the requirements, please visit http://business-services.miami.edu/departments/risk-management/vendor-insurance/index.html. The requirements are also posted on the application for the supplier to review.
• Once registration is completed, the Certificate of Insurance is approved or denied by Risk Management.
• If the supplier’s Certificate of Insurance has expired, invoices can still be paid.
Suppliers receive several notifications when their insurance is about to expire as well as when their insurance has expired. Specifically they are informed 90, 60, and 30 days before, on the date of expiration and several notifications after it expires.

**SUP# vs P# - WHAT IS THE DIFFERENCE BETWEEN A “SUP” VENDOR AND A “P” VENDOR?**
- “SUP” (i.e. sup-0123) vendors can only be used only for check requests.
- “P” (i.e. p1234567) vendors can be used for purchase orders and if authorized, check requisitions.

**REVIEW ONBOARDING STATUS - CAN I VIEW THE SUPPLIER ONBOARDING STATUS ON UMARKETPLACE?**
The end user can go out into UMarketplace via Workday. Once an end user is in UMarketplace, click the Suppliers icon in the left column. Choose Search for a Supplier. Type the supplier name and click GO. If the supplier name appears, use the chart below to determine your action. If the supplier does not appear, they may go by a different name or an invite was never sent to the supplier. Contact supplychain.supplierapp@miami.edu for more information.

<table>
<thead>
<tr>
<th>Green Check or Red X</th>
<th>P#</th>
<th>Example</th>
<th>End User Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>P #</td>
<td><img src="https://example.com" alt="Example" /></td>
<td>Create a requisition.</td>
</tr>
<tr>
<td><img src="https://example.com" alt="Green Check" /></td>
<td>P #</td>
<td><img src="https://example.com" alt="Example" /></td>
<td>Email <a href="mailto:supplychain.supplierapp@miami.edu">supplychain.supplierapp@miami.edu</a> for more information.</td>
</tr>
<tr>
<td><img src="https://example.com" alt="Red X" /></td>
<td>P #</td>
<td><img src="https://example.com" alt="Example" /></td>
<td>If “Dupl – Use P....” appears, the supplier has multiple names. Use the P# listed.</td>
</tr>
<tr>
<td><img src="https://example.com" alt="Red X" /></td>
<td>No P#</td>
<td><img src="https://example.com" alt="Example" /></td>
<td>If the Supplier Registration Workflow says “Submitted Future,” contact the supplier and tell them they need to Submit the application.</td>
</tr>
</tbody>
</table>
SUPPLIER TASKS - MY SUPPLIER CONTACT SAYS THEY SUBMITTED THE APPLICATION BUT THE SUPPLIER STILL DOES NOT APPEAR IN WORKDAY?

- If the UMarketplace Supplier Registration Workflow says “Submitted Future,” contact the supplier and tell them they still need to click “Submit.”

- If the Supplier Registration Workflow says “Submitted (date and time).” Check again in 24 hours. The supplier should be loaded into Workday with a green check and P#.

NOTIFICATIONS - WILL DEPARTMENTS RECEIVE NOTIFICATION ONCE SUPPLIER IS APPROVED?
The employee that submitted the New Supplier Request form will receive an email once the vendor is approved and loaded.

INVOICING AND PAYMENT

- Suppliers can submit invoices to the department or through UMarketplace. It is up to the department to work with the supplier to inform them of their preference. Some departments prefer to review the invoice before processing an Invoice Submission Form in Workday.

- Payment terms can be changed after a supplier is activated. An email request from either the department or the vendor requesting the term change needs to be submitted.
  - Send an email to supplychain.supplierapp@miami.edu
  - Boyd Bartow 305-284-5208 or bbartow@miami.edu
  - The request will be evaluated and appropriate party contacted.

ACH / WIRE TRANSFERS - HOW DO I REQUEST ACH AND WIRE TRANSFER?
Email the Accounts Payable Manager, Elsa Liauwapau at eliauwapau@miami.edu. Copy Boyd Bartow at bbartow@miami.edu with the Supplier number and an explanation as to why you are making the request along with the banking information. If the request is approved it will be enabled by the Supply Chain Data Team. NOTE: Foreign Suppliers can have Wire Transfers and domestic suppliers can have ACH if approved by Accounts Payable.
ONBOARDING CONTACTS - IF A SUPPLIER OR AN END USER HAS QUESTIONS REGARDING THE APPLICATION WHO CAN THEY CONTACT?

- Call Supply Chain at 305-284-5751
- Send an email to supplychain.supplierapp@miami.edu
- Boyd Bartow 305-284-5208 or bbartow@miami.edu