Onboarding Tutorial

Summary of Steps

1. Check Workday to see if the supplier appears with the correct address and a current certificate of insurance.
2. Check UMarketplace to see if the supplier appears with a green checkmark and a P number. Supplier notes and contact information will also appear here.
3. If the supplier does not appear in either Workday or UMarketplace, submit a New Supplier Request Form.

Breakdown of Each Step

1. **Check Workday**
   - In Workday, check if the supplier already appears with the correct address and valid insurance.
   
   **STEPS:**
   a. In the search box, type **Find Suppliers**.
   b. Click **All of Workday**.
   c. Click **Find Suppliers**.
   d. In the **Supplier Name** field, type the supplier’s name. (ex “Subway”)
   e. Click **OK**.
      - If the supplier does not appear in Workday, skip to Step 2 below to check UMarketplace.
      - If the supplier appears, a requisition can be created.
   f. Find the corresponding supplier, and click the magnifying glass.
   g. To check the corresponding addresses, click the **Contact Information** tab.
   h. Scroll down and view the addresses. If the correct location appears, copy the P# listed at the top left corner of the screen. This can be used to ensure the correct supplier is used when creating a requisition. **Do not use the P# listed on the right.**
   i. To view the certificate of insurance, click the **Summary** tab and review the **Certificate of Insurance Date**. If the certificate of insurance is expired, a requisition can be created, but may be held up in the approval process. Contact Jude Chery from Risk Management.
2. **Check UMarketplace**
   If the supplier does not appear in Workday, check if the supplier appears in UMarketplace with a green checkmark and P number. Notes and contact information also appear here.

**STEPS:**
a. From the Workday dashboard, click **Purchases**.
b. Click **Connect to Supplier Website**.
c. Click **Connect**.
d. Click the **Suppliers** icon (green left hand column).
e. Click **Search for a Supplier**.
f. Type the supplier name (ex “Artstor”).
   - If the supplier does not appear in UMarketplace, skip to Step 3 below to complete a New Supplier Request Form.
   - If the supplier does appear, make sure it has a green checkmark and P number.
   - If the supplier appears and either the green checkmark or P number are missing contact supplychain.supplierapp@miami.edu

g. Review the **Registration Status** and take the corresponding action.
   - **Invited** – UM has sent the supplier an invite and they have not submitted the application. If the supplier says they did not receive the invite, confirm the contact information, let the supplier know they will receive a new email invite from UMiami@sciquest.com. Then contact supplychain.supplierapp@miami.edu to provide them with any updated contact information and request they send a new invite.

3. **Complete a New Supplier Request Form**
   If the supplier does not appear in either Workday or UMarketplace, complete a New Supplier Request Form.

**STEPS:**
Before completing the New Supplier Request Form, contact the supplier and obtain the following information:

a. Name, phone and email of the person that will be completing the supplier application. **If the application invite is forwarded to another employee, the link will become invalid.**
   b. Has anyone at the requested company been an employee of the University of Miami in the last 12 months?
c. Is this vendor owned directly or indirectly by a physician or immediate family member of a UM physician?
b. From the Workday dashboard, click UM Quicklinks.
c. Click New Supplier Request.
d. Commodity Type – click the magnifying glass and search for a corresponding commodity type. If the commodity does not appear, select “Other” and specify the commodity. Ex prescription drugs for human study.
e. Complete the form with the supplier’s contact information from step 3a.
f. Add Supplier to the Meperia System? - If the item is disposable and will be purchased with a non-UMMG hospital account, check Yes.
g. UM Hospital Vendor - If the item will be shipped to UHealth Tower (formerly UMH), check Yes.
h. Has anyone at the requested company been an employee of the University of Miami in the last 12 months? Check Yes or No
i. Is this vendor owned directly or indirectly by a physician or immediate family member of a UM physician? Check Yes or No
j. Click Order Now.
k. Check the status of the onboarding process using Steps 1 and 2 above.

Additional Resources

Supply Chain Services
- General Support Phone 305-284-5751
- General Support Email supplychain.supplierapp@miami.edu
- Onboarding FAQs
- Supplier Registration Steps (UMarketplace)
- Training Contact: Heidi Tyre htyre@miami.edu

Risk Management
- Certificate of Insurance (COI) Example
- Supplier Insurance Requirements