



UNIVERSITY OF  
**SOUTH CAROLINA**

**Controller's Office  
Supplier Onboarding  
Refresher Training  
March 2023**

# Today's Agenda

- Supplier Onboarding Updates
- What is Supplier Onboarding
- Supplier Liaisons
- Searching for a Supplier in PeopleSoft
- Invitation Letters
- My System Profile – Business Email Check
- 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
- Student Reimbursement Process
- Resources
- Contacts



# Supplier Onboarding Updates

- Went live with “Forgot My Password” functionality on July 21, 2022.
- Suppliers can now reset password through self-service portal.
- Supplier Team will no longer reset passwords.
- For suppliers with a user ID prior to July 21, 2022, that has forgotten password will need to request a new user ID and set password questions at that time.



# What is Supplier Onboarding

- An online supplier registration system that gives potential suppliers access to self-service registration and change requests through a supplier portal in Finance PeopleSoft.
- **The self-service portal allows:**
  - 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 includes email notifications and approvals at the department and Supplier Team levels.
- Go live date was Monday **July 27, 2020**.



# Supplier Liaisons

## Supplier Liaisons are 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.

**Review Suppliers**

Search Criteria

\*SetID: USC01

Name: Contains foods

Supplier ID: [ ]

Withholding Name: Equal to [ ]

Supplier Status: [ ]

Sanctions Status: [ ]

Short Name: Equal to [ ]

Classification: [ ]

Type: [ ]

Persistence: [ ]

Address: Equal to [ ]

Customer Number: [ ]

City: [ ]

ID Type: U.S. Tax Identification Number

Country: [ ]

State: [ ]

VAT Registration ID: [ ]

Postal: [ ]

Withholding Tax ID: [ ]

Bank Account #: [ ]

Max Rows: 300

Search Clear Add Supplier

**Search Results**

1-10 of 31 View All

Actions	SetID	Supplier ID	Supplier Name	Supplier Status	Address	City	State	Postal Code	Country	Address_Status
▼ Actions	USC01	000000989	PERFORMANCE FOODSERVICE IFH	Approved	PO Box 933580	Atlanta	GA	31193-3580	USA	Active
▼ Actions	USC01	000000989	PERFORMANCE FOODSERVICE IFH	Approved	2801 Alex Lee Boulevard	Florence	SC	29508-8260	USA	Active
▼ Actions	USC01	000000989	PERFORMANCE FOODSERVICE IFH	Approved	PO Box 741580	Atlanta	GA	30374-1580	USA	Active
▼ Actions	USC01	0000001288	FEASTERS FOODS	Inactive	111 Marlboro Street NE	Aiken	SC	29801-4570	USA	Active
▼ Actions	USC01	0000001288	FEASTERS FOODS	Inactive	111 Marlboro Street NE	Aiken	SC	29801-4570	USA	Active
▼ Actions	USC01	0000001288	FEASTERS FOODS	Inactive	PO Box 842	Aiken	SC	29802-0842	USA	Active
▼ Actions	USC01	0000003473	US FOODS INC	Approved	8399 West Higgins Road Ste 500	Rosemont	IL	60018-4992	USA	Active

**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](mailto: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](#).



# My System Profile – Business Email Check

**Navigation:** Main Menu > My System Profile

**Alternate User**

If you will be temporarily unavailable, you can select an alternate user to receive your routings.

Alternate User ID

From Date  (example:12/31/2000)

To Date  (example:12/31/2000)

**Workflow Attributes**

Email User  Worklist User

**Email**

Primary Email Account	Email Type	Email Address		
<input checked="" type="checkbox"/>	Business	JOANNEC@mailbox.sc.edu	+	-

**IM Information**

Protocol	XMPP Domain	UserID	Password		
XMPP	<input type="text"/>	<input type="text"/>	<input type="text"/>	+	-

**Save**

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 UofSC 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 UofSC
- Manage supplier information, such as addresses, contacts, and payment information

To register with UofSC to become a new supplier, please click [here](#).

**WEB BROWSER TIP:** Approved browsers include 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 **Create an Account (New Users) Tile** and select a **New Supplier 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 UofSC Supplier Liaison,

Add your name here



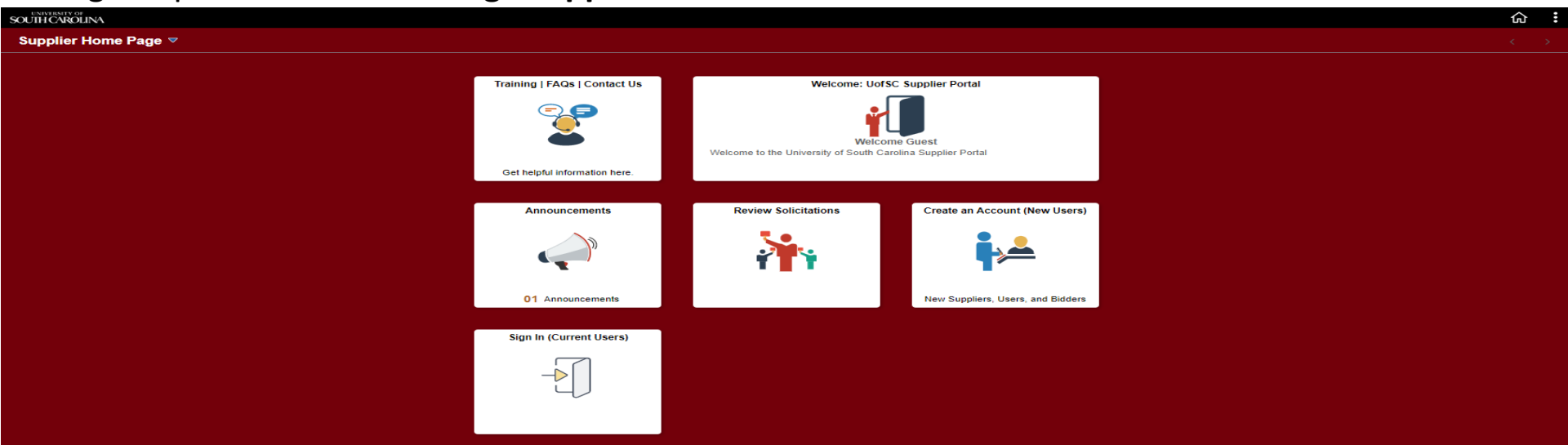
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# Supplier Onboarding Self-Service Portal

**Potential Suppliers** that are not currently in the system will use the applicable invitation letter sent to them by the Supplier Liaison to enter the self-service portal where they will **Create an Account** and complete a **New Supplier** form. **\*NOTE ABOUT REQUEST MORE INFO\***

**Current Suppliers** that are in the system but do not have sign in credentials will use the applicable invitation letter sent to them by the Supplier Liaison to enter the self-service portal where they will **Create an Account** and complete a **Get User ID** form.

Once a **Potential Supplier** or **Current Supplier** has sign in credentials, they will **Sign In** and complete a change request from the **Manage Supplier Information** tile.



# Supplier Registration Form

**Navigation:** [Supplier Home Page](#) > [Create an Account \(New Users\)](#) > [New U.S./International Supplier Request](#)

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**.

[Supplier Home Page](#)

User Registration



## New U.S. Supplier



Have you been invited by a UofSC contact to complete a new supplier registration? Use this registration if you are a domestic (U.S.) corporation or individual and your company is not already registered as a Bidder/Offeror.

[More...](#)

[Register now](#)

## New International Supplier



Have you been invited by a UofSC contact to complete a new supplier registration? Use this registration if you are a non-US corporation or individual.

[More...](#)

[Register now](#)



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# Which tax form should my supplier use?

- U.S. Citizen: W-9.
- International individual providing service OUTSIDE the U.S.: W-8BEN
- International Individual Providing Service INSIDE the U.S.: Form 8233
- International Business Entity: W-8BEN-E



# Approval Workflow

- All new **Supplier Registrations will be approved first 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 by the Supplier Team only.** These are current UofSC suppliers that need access to their profile on 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 you aren't logged into HCM as you cannot access both Finance PeopleSoft and HCM simultaneously)

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

**Manage Request Approval**

[Registration Details](#)

Registration ID:	REG0000061	Entered on:	07/02/2020
Company Name:	Big Solutions LLC	Approval Status:	Pending Approval
Email ID:	Baileydk@mailbox.sc.edu	SetID:	USC01
Country:	USA United States	OFAC Checking:	OFAC checked
Address:	1400 Nix Road	Duplicates Supplier:	Not Found
City:	Columbia	Postal:	29208
State:	SC		

**Identification & Classification**

U.S. Tax Identification Number 600000000

► **Profile Questions**

**Self Categorization**

► **Review / Edit Approvers**

# New User ID Request Invitation Letter

**\*NOTE ABOUT SUPPLIER ID\***



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:** Approved browsers include 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 **Create an Account (New Users) Tile** and select **Get User ID** 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 UofSC Supplier Liaison,

Add your name here



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# Supplier User ID Request

**Navigation:** Supplier Home Page > Create an Account (New Users) > Get User ID – Active Supplier / Current Int.

Use the **Get User ID** form to request a 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 request a User ID. Select a form based on whether the supplier is **Domestic** or **International**.

[Supplier Home Page](#)

User Registration



## Get User ID - Active Supplier



Are you already an active UofSC Supplier? You can obtain a User ID here as a domestic (U.S.) supplier.

[More...](#)

Register now

## Get User ID - Current Intl. A



Are you already an international UofSC Supplier with a foreign tax ID number? Use this registration to get a User ID.

[More...](#)

Register now

## Get User ID - Current Intl. B



Are you already an international UofSC Supplier with a U.S. Tax ID? Use this registration to get a User ID.

[More...](#)

Register now



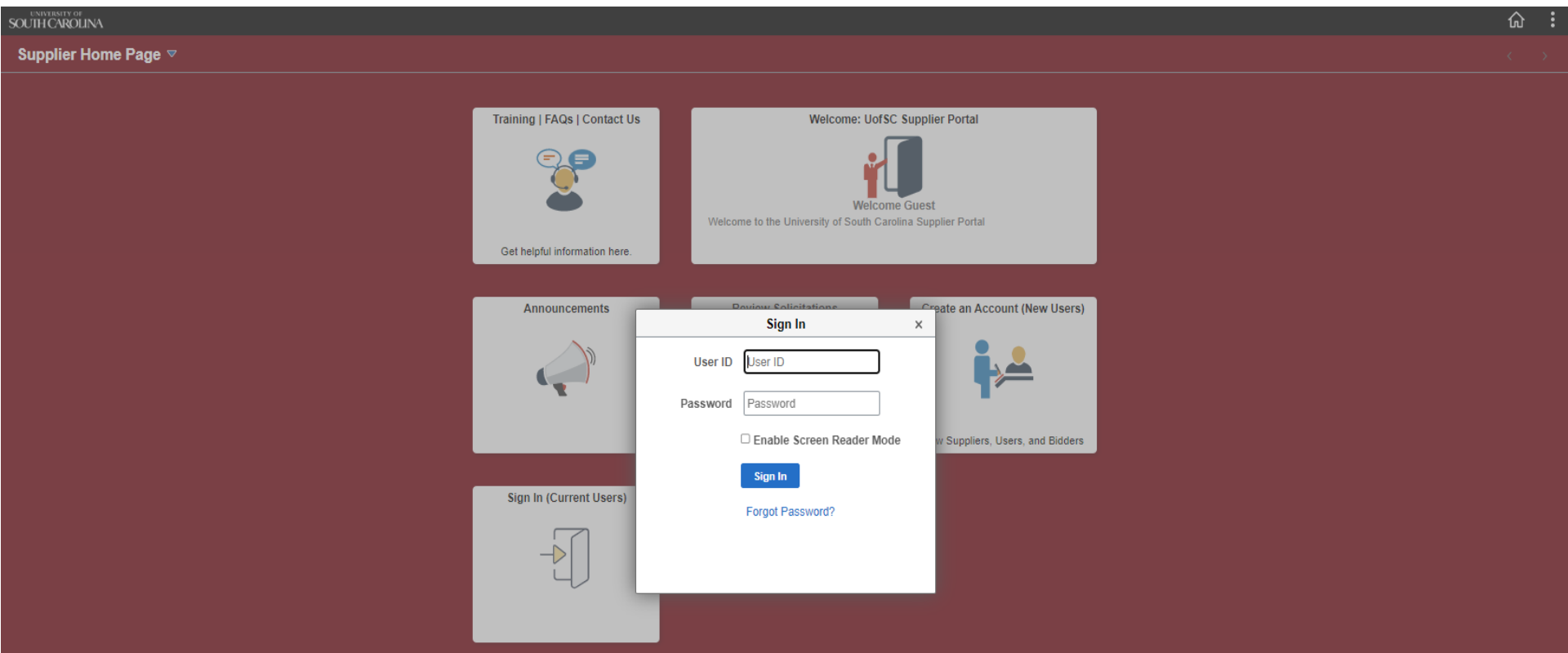
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# Supplier Change Request

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

**Reminder:** To receive a User ID and Password, a potential supplier will need to register as a **New Supplier** while a current supplier will need to **Get 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**.

The screenshot shows a web application interface for managing supplier profiles. The top navigation bar includes a back button labeled 'Supplier Home Page', the title 'Manage Profile', and utility icons for home, flags, and a menu. On the right side of the header, there are links for 'New Window', 'Help', and 'Personalize Page'. The left sidebar contains two menu items: 'Domestic Change Request' (highlighted in green) and 'International Change Request'. The main content area is titled 'Supplier Change Request Selection'. It features a 'Select Supplier' section with a dropdown menu currently showing 'GRAND VALLEY STATE UNIVERSITY'. Below this is a green 'Create New Request' button. A section titled 'Pending Change Requests' contains a table with the following data:

Supplier ID	Name	Request ID	Change Status	Date
0000040290	GRAND VALLEY STATE UNIVERSITY	CHG0000001	Pending Approval	07/10/2020

A blue pause button is visible on the left side of the table.



# Cash Custodians

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](mailto:apsupplr@mailbox.sc.edu). Be sure to include support documentation.

**Controller's Office  
Cash Custodian Supplier Form**

This form is to be used only for student travel advance, cash advance, petty cash or change fund custodian supplier setup.  
\*\*Changes in petty cash & change fund custodians require approval from the Controller's Office\*\*

Legal Name: \_\_\_\_\_

USC Mailing Address Line 1: \_\_\_\_\_

USC Mailing Address Line 2: \_\_\_\_\_

City, State & Postal Code: \_\_\_\_\_

USC ID (Do not use SSN): \_\_\_\_\_

Email Address: \_\_\_\_\_

Telephone: \_\_\_\_\_

Employee/Student Signature: \_\_\_\_\_

Student Travel Advance     Cash Advance     Petty Cash     Change Fund

For changes in Petty Cash & Change Fund Custodians only:  
Petty Cash or Change Fund Balance on General Ledger: \_\_\_\_\_ (Must attach current reconciliation)

Chartfields							
Operating Unit	Department	Fund	Account	Class	PC Business Unit	Project	Activity

Department: \_\_\_\_\_

Department Contact (Name, Email, Phone): \_\_\_\_\_

Departmental Approval: \_\_\_\_\_ Date: \_\_\_\_\_

Please email this Supplier Form to [APSupplr@mailbox.sc.edu](mailto:APSupplr@mailbox.sc.edu)

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Controller's Office Use Only:

Petty Cash/Change Fund Approval: \_\_\_\_\_ Date: \_\_\_\_\_

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.



# 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](mailto: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.



# 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.

Operating Unit	Department	Fund	Expense Account	Class	PC Business Unit	Project	Activity	Amount

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](mailto:APUpload@mailbox.sc.edu)



# Where to Find Resources

GATEWAYS FOR: STUDENTS FACULTY & STAFF ALUMNI PARENTS CALENDAR MAP DIRECTORY GIVE

 **South Carolina**

SEARCH SC.EDU 

## Office of the Controller


- Office of the Controller
- General Accounting
- Grants and Funds Management
- Supplier and Tax Management
  - Supplier Management**
  - Tax Management
  - Webinars and Training
- Cash and Treasury Management
- Financial Reports and Transparency
- Chart of Accounts
- Policies and Procedures
- Contact Us





### 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.

Expand all 

- Supplier Onboarding** 
- Supplier Types** 
- Supplier Forms and Instructions** 
- Supplier Liaison FAQs** 

### Contact Supplier Management

To inquire via email:  
[APSUPPLR@mailbox.sc.edu](mailto:APSUPPLR@mailbox.sc.edu)

To inquire via mail:  
1600 Hampton Street  
6th Floor, Controller's Office  
Columbia, SC 29208

Office of the Controller

Location Contact Calendar



# Contacts

## Contact Us

<b>General Accounting (JEs, JVs, Apex, GL issues/questions)</b>	<a href="mailto:genacctg@mailbox.sc.edu">genacctg@mailbox.sc.edu</a>
Cash Advance Settlement	<a href="mailto:cashadvc@mailbox.sc.edu">cashadvc@mailbox.sc.edu</a>
Payroll Retro Journal Entries	<a href="mailto:retroje@mailbox.sc.edu">retroje@mailbox.sc.edu</a>
Chartfield Maintenance	<a href="mailto:cfmaint@mailbox.sc.edu">cfmaint@mailbox.sc.edu</a>
Moving Mailbox	<a href="mailto:moving@mailbox.sc.edu">moving@mailbox.sc.edu</a>
PeopleSoft Finance Security Requests	<a href="mailto:pssecure@mailbox.sc.edu">pssecure@mailbox.sc.edu</a>
<b>Accounts Payable</b>	<a href="mailto:ap@mailbox.sc.edu">ap@mailbox.sc.edu</a>
AP Uploads	<a href="mailto:apupload@mailbox.sc.edu">apupload@mailbox.sc.edu</a>
Supplier Maintenance	<a href="mailto:apsupplr@mailbox.sc.edu">apsupplr@mailbox.sc.edu</a>
<b>Travel Office</b>	<a href="mailto:teoffice@mailbox.sc.edu">teoffice@mailbox.sc.edu</a>
Student/Non-employee Travel Authorizations and Travel Reimbursement Vouchers	<a href="mailto:tesubmit@mailbox.sc.edu">tesubmit@mailbox.sc.edu</a>
<b>Capital Asset Team</b>	
Physical Inventory	<a href="mailto:physinv@mailbox.sc.edu">physinv@mailbox.sc.edu</a>
<b>Treasury</b>	<a href="mailto:treasury@mailbox.sc.edu">treasury@mailbox.sc.edu</a>
Business Expense/Participant Card	<a href="mailto:cards@mailbox.sc.edu">cards@mailbox.sc.edu</a>
Team Card	<a href="mailto:teamcard@mailbox.sc.edu">teamcard@mailbox.sc.edu</a>
Travel Card	<a href="mailto:trvcard@mailbox.sc.edu">trvcard@mailbox.sc.edu</a>
<b>Tax Office</b>	<a href="mailto:tax@mailbox.sc.edu">tax@mailbox.sc.edu</a>
Research/Development Sales/Use Tax Exemptions	<a href="mailto:rdequip@mailbox.sc.edu">rdequip@mailbox.sc.edu</a>
<b>Payroll</b>	<a href="mailto:payroll@mailbox.sc.edu">payroll@mailbox.sc.edu</a>
<b>Controller's Compliance Office</b>	<a href="mailto:concppl@mailbox.sc.edu">concppl@mailbox.sc.edu</a>
<b>Controller's Office</b>	<a href="mailto:controller@sc.edu">controller@sc.edu</a>



# Questions







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