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

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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**.

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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 **<u>initial</u>** supplier set up and their questions

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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.

My System Profile – Business Email Check

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.

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New Supplier Registration Invitation Letter

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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

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.
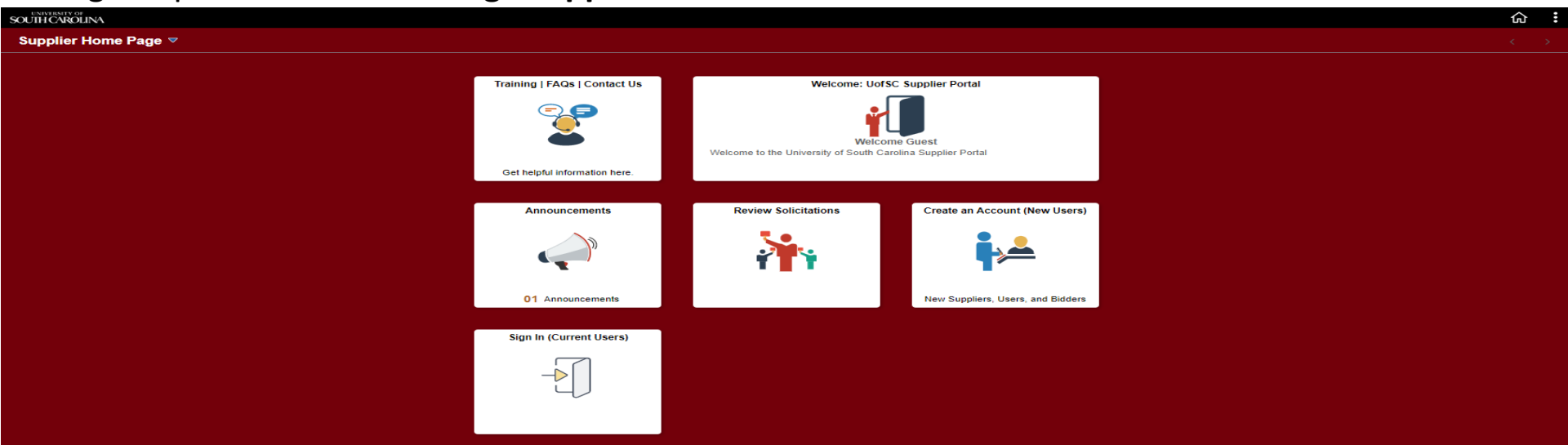
Supplier Registration Form

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**.

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

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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.

New User ID Request Invitation Letter

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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

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.**
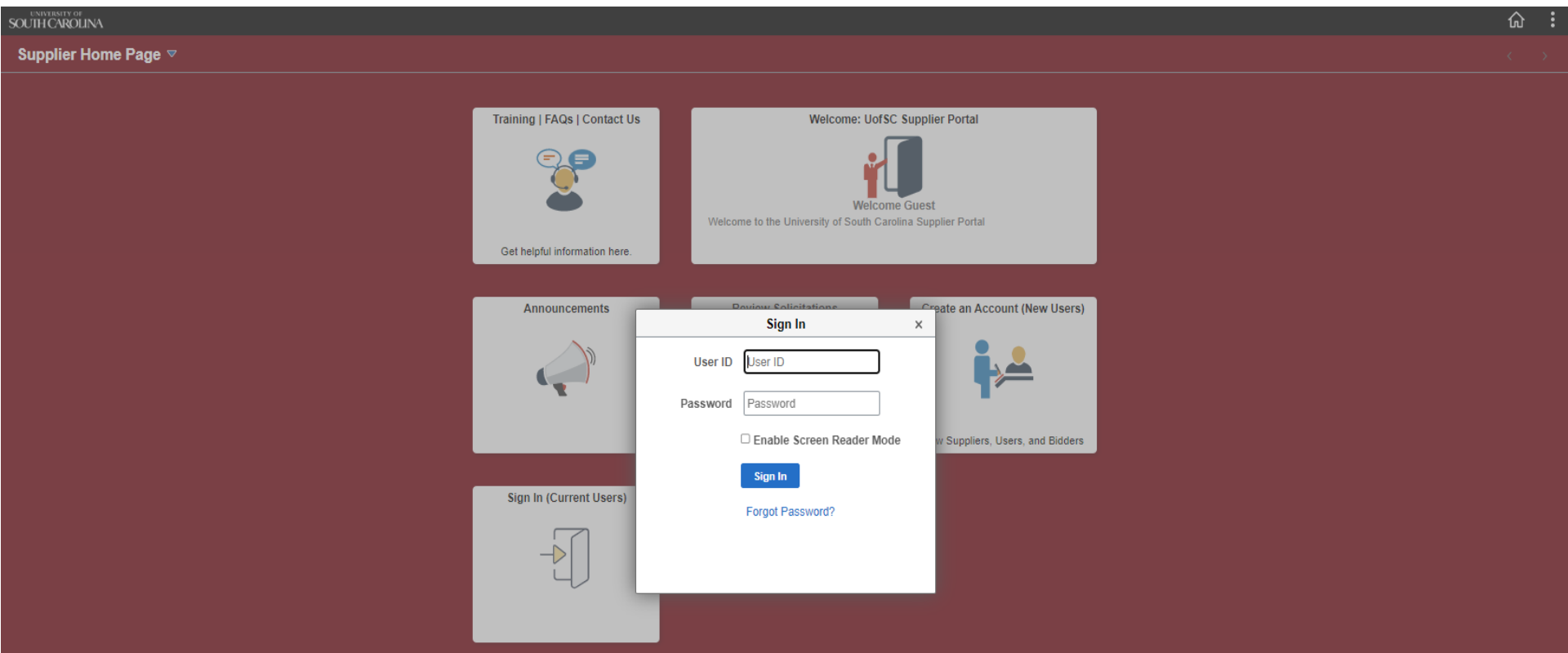
Supplier Change Request

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**.

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. 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.

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.

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Student Reimbursement Form

Controller's Office
Student Reimbursement Form

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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

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Where to Find Resources

Contacts

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

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Questions