

# Supplier Onboarding

PROCUREMENT SERVICES  
WEBCAST TRAINING SERIES - 3/16/2022

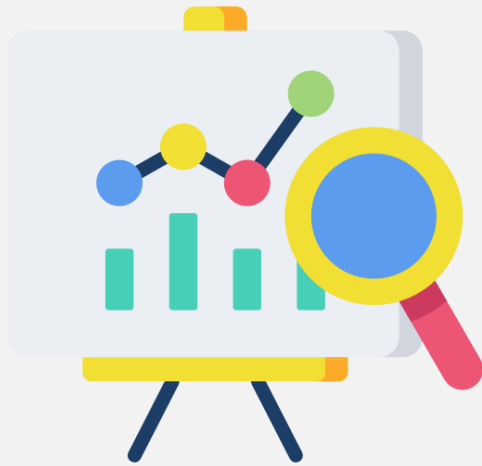
HEATHER NICHOLSON, JOHN WHITNEY, CHAD BRASURE

# What is Supplier Onboarding?

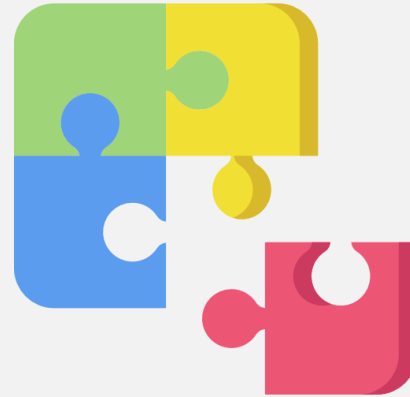
The process to have a new supplier added to the UW supplier database, to conduct business with a supplier via UW procurement systems.

Name	Number	IRS Entity Type	Date Added	TIN Verified	Available in Ariba	Status
SEATTLE CHILDRENS HOSPITAL	110557	Non-Profit	05-12-1985	Matches IRS EIN Records	Y	Active
	<b>Address Type</b>	<b>Seq #</b>	<b>Address</b>	<b>Status</b>	<b>Ready for BPO</b>	<b>Ariba Network</b>
	Order From	2	PO BOX 5371 SEATTLE, WA 98105	Active	Y	Y
	<b>Address Type</b>	<b>Seq #</b>	<b>Address</b>	<b>Status</b>	<b>Payment Method</b>	
	Remit To	21	MEDICAL STAFF SERVICES 4800 SAND POINT WAY NE PO BOX 5371 M/S RC-405 SEATTLE, WA 98145	Active	Check	

## What to Know Before You Begin



## Onboarding Steps



## Best Practices



# Onboarding is a Multi-Team Effort:

Supplier

Central  
Office

Campus  
Department

**The fastest supplier onboarding is the one you don't need!**

Before using a new supplier, try checking:

- Ariba Catalogs (many manufacturers' are included)
- UW Contracts Search
- With our Subject Matter Experts for a potential contract
- The active supplier list in the Supplier Search
- ProCard for low dollar purchases when allowable

# When Suppliers Should Submit a Supplier Registration Form (SRF):

- New suppliers receiving first payment from UW
- Suppliers previously registered with UW but have had their information deleted due to lack of business for two years or more
- Suppliers with a change in business name, ownership or taxpayer ID number

\*We will focus on new suppliers for this presentation

# Who Should NOT Submit an SRF

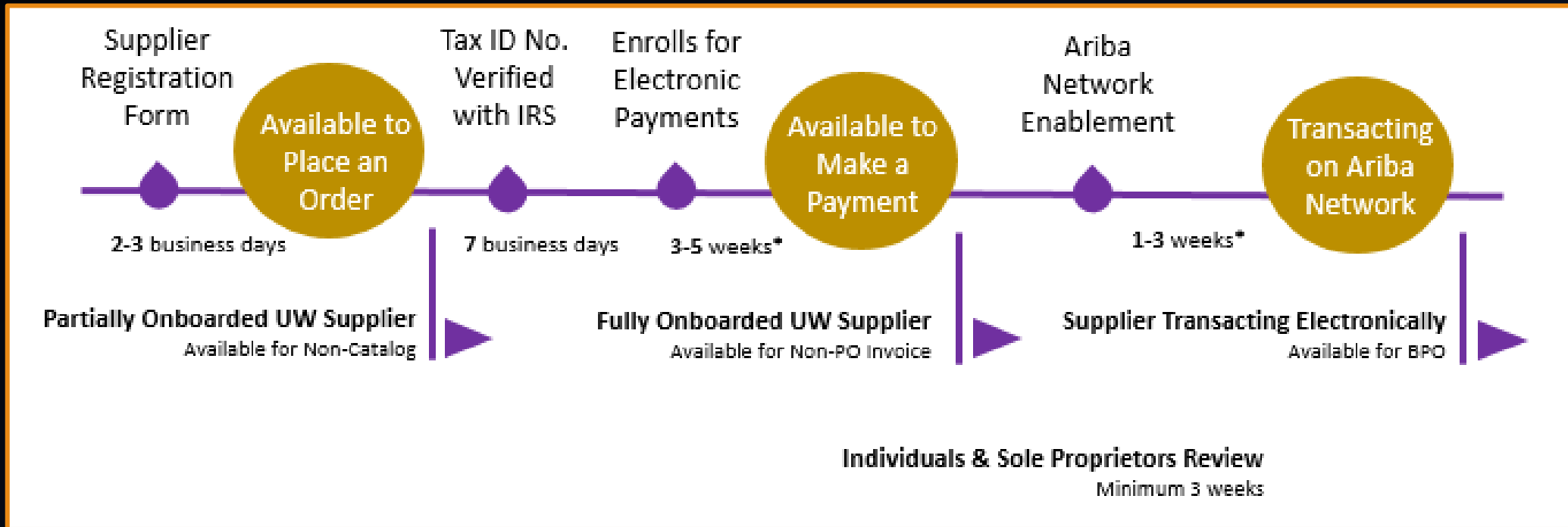
- Address Changes
- Current Employees\*
- Former employees\*
- One time payment to an individual (P2I)

\*Current and Former Employees are generally excluded from becoming a UW supplier.

# Terms

- **Supplier Onboarding** - the steps a supplier must complete in order to do business with UW
- **Supplier Registration** - UWs online IRS Substitute W-9 that suppliers complete to become a supplier for UW
- **TIN Matching** – UW's process to verify the Taxpayer ID number with the IRS
- **Order address** - Address order is sent to
- **Remit address** – Address payment is sent to
- **Ariba Network** – a software platform suppliers use to electronically transact with UW and other customers

# Process Timeline



\*Get the supplier engaged with the registration process early!



# How to Start:

- ✓ Check the supplier search report to see if your supplier is registered and active.

The screenshot shows the 'Supplier Search' report in the University of Washington Enterprise Reporting & Analytics system. The report is for supplier number 110557, identified as SEATTLE CHILDRENS HOSPITAL. The report is dated 3/6/20 at 11:05 AM. The status is 'Active'.

**Executive Summary**  
The Supplier Search report provides a list of registered UW suppliers that have completed the initial Supplier Registration Form (SRF). The report provides the supplier's status as of the previous day and will indicate whether the supplier is active and able to receive orders and payments or whether the supplier is on hold / deleted which will prevent orders and payments from being transmitted to the supplier.

Name	Number	IRS Entity Type	Date Added	TIN Verified	Available in Ariba	Status
SEATTLE CHILDRENS HOSPITAL	110557	Non-Profit	05-12-1985	Matches IRS EIN Records	Y	Active

- ASTRA authorization to EDW is required to access the Business Intelligence Portal (B.I. Portal)
- ASTRA role for EDW - Administrator/Manager/FiscalTech

# Step 1: Supplier Registration Form (SRF)

UW's online IRS Substitute W-9:

- 10 steps to complete
- Confirmation code provided at the end
- Supplier will receive follow-up email with next steps

**Important:** Step 2

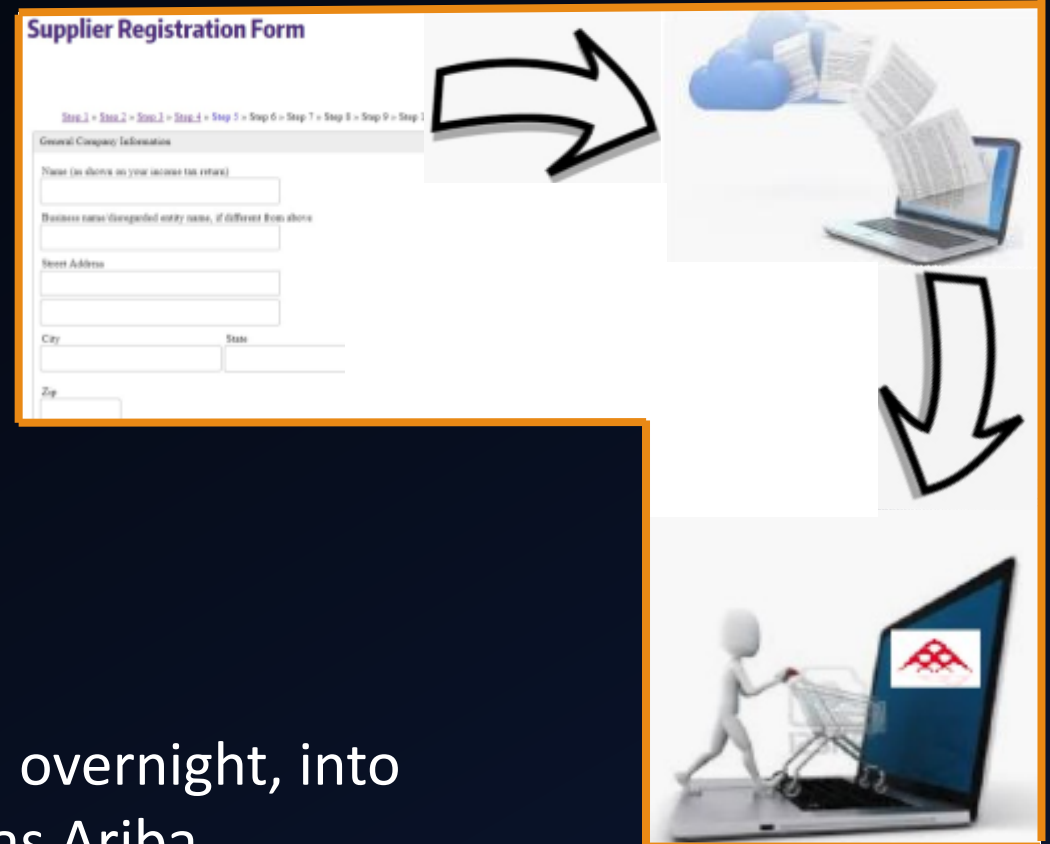
- Supplier should include a UW contact
- Option for onetime check payment

The screenshot shows the 'Preliminary Information' section of the UW Supplier Registration Form. At the top, there is a navigation bar with links for Step 1 through Step 10, where Step 1 is highlighted. The main content area contains three questions with radio button options:

- Question 1: "Are you currently doing business with the University of Washington, UW Medical Center, UW Physicians, UW Neighborhood Clinics, Harborview Medical Center or Airlift Northwest?" with options  Yes and  No.
- Question 2: "Do you have a current department contact at the university?" with options  Yes and  No.
- Field: "Department contact name and email" with an empty text input box.
- Question 3: "Are you requesting a single payment with no continued business?" with options  Yes and  No.

# Central Office Review

- Once the Supplier Registration Form is submitted, it is reviewed by Central Office.
- After review, the supplier's information is uploaded to the supplier database.
- The information is then uploaded, overnight, into other downstream systems, such as Ariba.



# Step 2: Tax ID Verification

UW verifies the supplier's Taxpayer ID Number (TIN) information (EIN or SSN) with the IRS database.

- UW must hold all payments until the correct TIN information is received and confirmed as matching IRS files without exception, as any inconsistencies may result in IRS penalties.
- TIN verification is completed weekly, typically by Thursday. Earliest payment can be issued is the following Monday.
- If a mismatch happens, it takes a minimum 1-2 weeks to resolve. No business can occur while a supplier is in a TIN mismatch status.

Name	Number	IRS Entity Type	Date Added	TIN Verified	Available in Ariba	Status
<input type="checkbox"/> UNIVERSITY OF COLORADO	133088	Governmental Agency	03-23-1987	Matches IRS EIN Records	Y	Active

# Step 3: Electronic Payment Method:

There are two different electronic payment methods available:

- The University of Washington's Terms and Conditions mention the preferred payment method is by bank payment card, also known as ePayables, through Bank of America.
- The alternative option is ACH direct deposit through Paymode-X

These options are identified in the registration form.

## ePayables Bank Card

A card payment program that uses a ghost card account to issue payments to suppliers (run like a credit card).

## ACH

Electronic payments made through Automated Clearing House (ACH) Network (like a direct deposit).

# Step 3: Electronic Payment Method

Address	Status	Ready for BPO	Ariba Network
4326 UNIV WAY NE SEATTLE, WA 98105	Active	Y	Y
Address	Status	Payment Method	
ACCOUNTS PAYABLE 4326 UNIVERSITY WAY NE SEATTLE, WA 98105	Active	TBD	

\*This step can take as few as 10 business days to complete, but can take longer as it is dependent on the supplier's response to registration instructions sent directly from Central Office.

\*Individuals or Sole Proprietors *without* a business name are not eligible for electronic payment.

# Step 4: Ariba Network

The Ariba Network (SAP Business Network) is a platform suppliers use to receive purchase orders and submit invoices electronically to their customers.

**Important:** UW only requires this step when a Blanket Purchase Order (BPO) is necessary.

Registering for the ARIBA Network will allow suppliers to:

- Receive purchase orders electronically from the University
- Create and transmit invoices electronically to the University
- Do business through Blanket Purchase Orders (BPOs)

# Step 4: Ariba Network

Q: How do you know if you can create a Contract Request (CR)/ Blanket Purchase Order (BPO) for a supplier?

A: The Supplier Search Report says “Yes” in the “Ready for BPO” column for that supplier.

Address	Status	Ready for BPO	Ariba Network
4326 UNIV WAY NE SEATTLE, WA 98105	Active	Y	Y
Address	Status	Payment Method	
ACCOUNTS PAYABLE 4326 UNIVERSITY WAY NE SEATTLE, WA 98105	Active	ACH	



# Step 4: Ariba Network

Ready for BPO
Y

To have a supplier “Ready for BPO” in the Supplier Search Report:

- Departments submit the Ariba Network Registration Request form:  
<https://finance.uw.edu/ps/resources/forms/ariba-supplier-network-registration-request>
- Once processed, Central Office will reply to your department with a confirmation email containing next steps.
- UW Departments should contact Procurement Customer Service ([pcshelp@uw.edu](mailto:pcshelp@uw.edu)) if they need a status update or assistance with a supplier completing any necessary steps for the Ariba Network.

# Step 4: Ariba Network

**Important:** The supplier's Ariba Network account is linked to an Order From address visible in the Supplier Search report. Suppliers can have multiple Ariba network accounts. If a purchase order is sent to the wrong supplier account, the order may have to be cancelled/closed and recreated.

Name	Number	IRS Entity Type	Date Added	TIN Verified	Available in Ariba	Status
<input type="checkbox"/> UNIVERSITY OF COLORADO	133088	Governmental Agency	03-23-1987	Matches IRS EIN Records	Y	Active
Address Type	Seq #	Address	Status	Ready for BPO	Ariba Network	
Order From	42	OFFICE OF CONTRACTS AND GRANTS (BOULDER) 3100 MARINE ST 572 UCB BOULDER, CO 80309	Active	Y	Y	
Order From	43	GRANTS AND CONTRACTS (DENVER) F428 PO BOX 910238 DENVER, CO 80291	Active	Y	Y	
Order From	49	PHYSICAL MEDICINE & REHAB (DENVER) 12631 EAST 17TH AVE AURORA, CO 80045	Active	Y	Y	
Order From	59	CIRES (BOULDER) 216 UCB BOULDER, CO 80309	Active	Y	Y	
Order From	65	SKAGGS SCHOOL OF PHARMACY (DENVER) 12850 E MONTVIEW BLVD C238 AURORA, CO 80045	Active	Y	Y	

# Best Practices and Guidance

- “Available in Ariba” does not indicate the supplier is on the network. This only indicates the supplier file information is being updated in the UW side of the Ariba system nightly.

Name	Number	IRS Entity Type	Date Added	TIN Verified	Available in Ariba	Status
THE REGENTS OF THE UNIVERSITY OF COLORADO	133088	Governmental Agency	03-23-1987	Matches IRS EIN Records	Y	Active
Address Type	Seq #	Address	Status	Ready for BPO	Ariba Network	
Order From	4	CON RESEARCH & SCHOLARSHIP-ANSCHUTZ 13120 E 19TH AVE ED 2 NORTH C288-19 AURORA, CO 80045	Active	Y	Y	

- If a BPO is necessary and a supplier’s Order From address is “N” for “Ready for BPO,” UW Departments must submit an Ariba Network Registration Request webform.

# Best Practices and Guidance

- Check Ariba catalogs and UW Contracts search first!
- Check the Supplier Search report before asking a supplier to start the onboarding process
- Start the process early, the moment you engage a supplier and prior to goods/services being delivered
- Current and Former Employees are excluded from being UW suppliers (including companies they own)

# Best Practices and Guidance

- Procurement Customer Service (PCS: [pcshelp@uw.edu](mailto:pcshelp@uw.edu)) is the main contact for:
  - UW departments: questions about supplier status and the Ariba Network
  - Suppliers: needing assistance setting up an Ariba Network account
- Allow Central Office to control the Supplier Onboarding process to avoid confusion:
  - Avoid internally created templates to suppliers
  - Utilize the online resources created by Central Office

# Resources

(Some pages have how-to guides posted)

Supplier Search Report in the BI Portal:

<https://edw.washington.edu/Reports/report/Financial/Supplier%20Search>

Supplier Registration Page: <https://finance.uw.edu/ps/supplier-information/registration>

ePayables Page: <https://finance.uw.edu/ps/epayables>

ACH Page: <https://finance.uw.edu/ps/how-to-buy/procard/ach>

Ariba Network Page: <https://finance.uw.edu/ps/supplier-information/ariba-network>



**Questions?**