

Supplier Request Process Changes

April 13, 2021

Total Supplier Manager

- New supplier registration and maintenance module within Mountaineer Marketplace
- Suppliers will register through online supplier portal
 - Upload W9 directly online
 - Submit supporting documentation online for ACH setup (RC)
 - Communicate directly with WVU Supplier Registration and Payment Services teams
 - Submit PO invoices directly into Mountaineer Marketplace
 - See registration and payment statuses

What changed?

Old Process

- Department submits Supplier Request form in Marketplace
- If department has W9 from supplier already, PCPS sends them a link to share via Filelocker.
- PCPS reviews W9 to see if it matches the information provided at Secretary of State, contract, invoice, etc.
- PCPS contacts supplier with any questions.
- PCPS enters the supplier record into wvOasis and waits for the state to approve (if state funded).
- PCPS enters the supplier record into MAP, which then feeds into Marketplace.
- PCPS approves supplier request in Marketplace which notifies department.

New Process

- Department submits Supplier Request form in Marketplace
- **PCPS sends email invite to supplier. Department is notified of update to their request.**
- **Supplier creates profile in the system, uploads W9, adds contact information, and payment information.**
- PCPS reviews W9 to see if it matches the information provided at Secretary of State, contract, invoice, etc.
- PCPS contacts supplier with any questions.
- PCPS enters the supplier record into wvOasis and waits for the state to approve (if state funded).
- **PCPS approves the registration in Marketplace, which then feeds into MAP. Department is notified.**

What hasn't changed?

- The information the Supplier Registration team needs/reviews has not changed.
 - W9/W8 is still required
 - Registration information must still match the Secretary of State's information

Submitting supplier requests

1. Look to see if your supplier is already registered. There are two ways to search:

- Using one of the automated forms
- Using the Manage Suppliers screen

2. If the supplier's name does not appear, submit a request form.

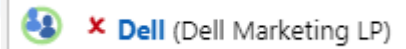
3. If the supplier's name comes up and it has a green check mark beside the name, the supplier is already active in Marketplace.



- Check the Contracts and Location -> Addresses section to see if the address on your quote/invoice is listed. If not, submit an Update Existing Supplier request.

Submitting supplier requests

4. If the supplier's name comes up, but with a red X in front of the name, the supplier is in the Jaggaer network but is not yet set up to do business with WVU. There will also not be a supplier number under the name. Submit a New Supplier – Non WVU Employee form.
5. If the supplier's name comes up with a red X in front of the name and a supplier number is displayed under the name, this supplier has been inactivated in MAP. Submit an Update Existing Supplier request.



Which form to submit?

Form	When to use
New Supplier – Non Employee	<ul style="list-style-type: none">• To register a new supplier that is not set up to do business with WVU.• Includes all supplier types except for WVU employee.• Includes RC/Hospital employees.
New Supplier – WVU Employee	<ul style="list-style-type: none">• To register a WVU employee to pay them for a service.• No action is needed to set a WVU employee up for reimbursements.
Update Existing Supplier	<ul style="list-style-type: none">• To update the information for an existing supplier.• To reactivate a supplier.• Used for all supplier types except for WVU employees.• Use the “Form Name” field to enter supplier’s name.

Notifications and Status Updates

The requestor will receive notifications as the request/registration makes its way through the process. Make sure to turn on those notifications in your profile in Marketplace.

Supplier Request has been Approved - The Registration Process Has Begun

Dear **User Full Name**,

Supplier request for **Supplier Legal Name** has been approved in form request workflow.

The supplier has now been invited to fill out necessary registration information.

You can expect to receive email alerts as the [WVU Supplier Registration](#) team reviews and approves the information submitted by the supplier.

Thank You,

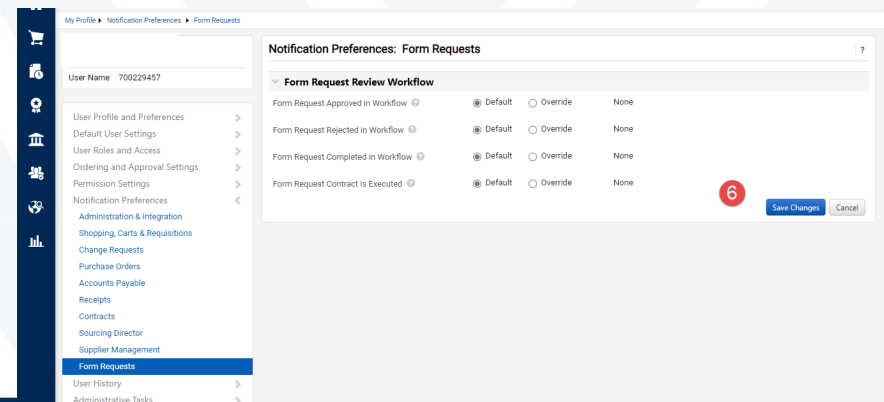
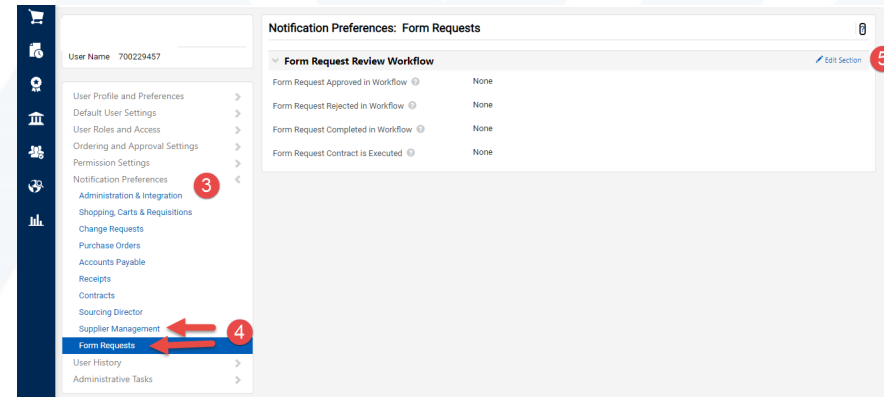
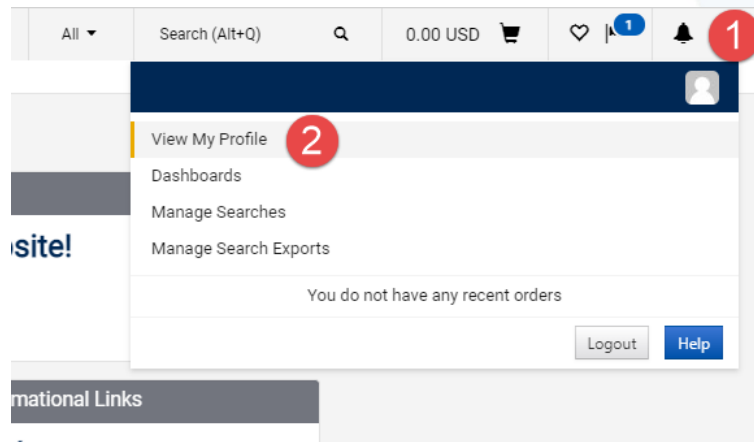
Your organization's name

Support Team Contact Information:

My Organization's support email address

Notifications and Status Updates

Follow the below instructions to update your notification preferences.



Notifications and Status Updates

The requestor will receive notifications as the request/registration makes its way through the process. Make sure to turn on those notifications in your profile in Marketplace.

- For new supplier requests:
 - Invited = WVU Supplier Registration Team has contacted the supplier to submit required information.
 - In Progress = The supplier has started to fill out the required registration information.
 - Profile Complete = The supplier has completed and submitted the required information to WVU for review.
 - Approved = The supplier will be available for use in Mountaineer Marketplace within the next hour.

Notifications and Status Updates

The requestor will receive notifications as the request/registration makes its way through the process. Make sure to turn on those notifications in your profile in Marketplace.

- For updates to existing suppliers or new supplier WVU employee:
 - You will receive a 'Workflow Approved' notification for each approval step of the workflow, as required.
 - You will receive a 'Completed Workflow' when the Supplier change has been made or the WVU Employee has been added to Marketplace.

Finding your requests

- For new supplier requests:
 - Suppliers icon on the left of your screen. Then click Requests -> My Supplier Requests. You can then filter based on the request status or supplier name.
- For Updates to existing suppliers or new supplier WVU employee:
 - Orders ->Procurement Requests -> and search.

Frequently Asked Questions

- Do I need to get the W9/W8 from the supplier? **No – the supplier must submit this online through the portal by using link emailed to them by PCPS.**
- What if I don't have contact information for the supplier? **Provide the information you have for the supplier, including how it was determined this supplier needed to be registered.**
- Is this required – **Yes, this is now the supplier registration process.**
- How do I know if my purchase/payment will be WVU or RC funded? **If the fund being used starts with a 7 or the award ends in R, that means it is RC funded. Any other funding will be WVU.**