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 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?

<table>
<thead>
<tr>
<th>Form</th>
<th>When to use</th>
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| New Supplier – Non Employee  | • 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  | • 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     | • 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.