

Supplier Onboarding for Purchase Orders

Use this guide to onboard suppliers for Academic and Miller School of Medicine Purchase Orders.
<https://workday.miami.edu>

Contents

Before Requesting a New Supplier

Requesting a New Supplier

Checking the Status

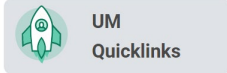
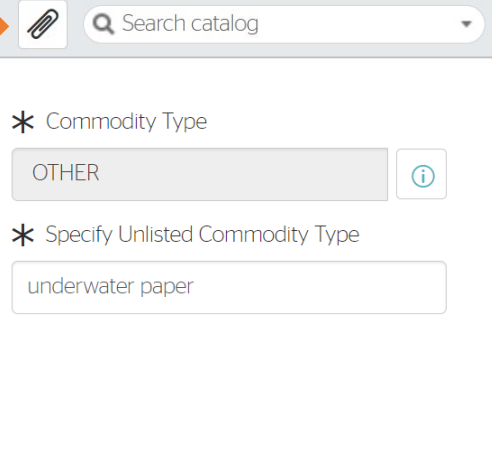

Before Requesting a New Supplier

1. **Payment Matrix** – Review the [Payment Matrix](#) to confirm a purchase order is required.
2. **Search for the Supplier** – If a purchase order is required, [search for the supplier](#) in UMarketplace to confirm if the supplier is already onboarded for Purchase Orders, with the correct address, Active status, and a supplier ID beginning with "P."
Important: Consider using a [diverse supplier](#) or a [frequently used supplier](#) that is already onboarded into Workday. This is the quickest PO process. Be aware, it may take suppliers weeks to gather and submit their documentation. On average, the Purchasing Department can process their part of the request in 2-3 business days. There are rare occasions when a supplier declines to onboard.
3. **Purchasing Buyers** – Reach out to the Purchasing Buyers for recommendations of active suppliers that are already in Workday for purchase orders.
TIP: If an alternate supplier does not exist, begin the onboarding process as soon as possible.
TIP: If the department does not believe the supplier is required to provide insurance, have the supplier email the scope of work to [UM Risk Management](#) to request a waiver. Then attach the waiver when completing the New Supplier Request form.

Supplier Onboarding for Purchase Orders

Use this guide to onboard suppliers for Academic and Miller School of Medicine Purchase Orders.
<https://workday.miami.edu>

Requesting a New Supplier

<p>1. Before completing the <i>New Supplier Request</i> form, contact the supplier first to gather the following information:</p> <ul style="list-style-type: none"> • Their W-9, the exact name, email, and phone number of the employee that will be completing the supplier's application. Important: If this step is skipped, the invitation that UM sends to the supplier can become invalid. If the supplier's general customer service email is used and the invitation is forwarded from the general email to the UM sales rep, the onboarding link becomes invalid, and the rep cannot complete the application. This is an important security feature, but it can unknowingly stop the onboarding process. • Has anyone at the requested company been an employee of the UM in the last 12 months? • Is this supplier owned directly or indirectly by a UM physician or an immediate family member of a UM physician? 	
<p>2. Log into Workday.</p>	<p>https://workday.miami.edu</p>
<p>3. Click the <i>UM Quicklinks</i> app. TIP: If the app doesn't appear click <i>View All Apps</i>.</p>	
<p>4. Click <i>New Supplier Request for Purchase Order</i>.</p>	
<p>5. Complete all fields:</p> <ul style="list-style-type: none"> • Attach the supplier's W-9 + supporting documents. • <i>Commodity Type</i> – Click the magnifying glass to search. If the commodity does not appear select "Other" and specify what is being purchased. • Type the <i>Contact Name, Phone, Email,</i> and <i>physician/family status</i> of the person that will be completing the Supplier's profile. • <i>Add Supplier to the Meperia System?</i> – (uncheck) • <i>Will this vendor be a UHealth Vendor?</i> – (uncheck) • <i>Business Reason</i> – (Describe what is being purchased and who it is for. E.g., underwater paper for scuba classes.) 	
<p>6. Click <i>Submit Order</i> to being processing.</p>	
<p>TIP: An RITM number will appear. Save this since it may be required to track the onboarding status. TIP: Email the supplier contact to let them know the invitation will come from UMiami@sciquest.com</p>	

Supplier Onboarding for Purchase Orders

Use this guide to onboard suppliers for Academic and Miller School of Medicine Purchase Orders.
<https://workday.miami.edu>

Checking the Status

Supplier Step TIPS:

- Suppliers can view examples of the [registration process](#).
- If the supplier's status is *Invited*, and the invitation needs to be resent do not submit another New Supplier Request form. Instead, send to a new email address, contact Supplychain.supplierapp@miami.edu.
- If a supplier has only partially completed the onboarding registration, please follow up with the supplier. For assistance, they can contact [Jagger Support](#).
- If the UService appears as Closed with "The request has been cancelled because it was rejected by one of the approvers with the following comment, please follow up with the vendor and contact supplychain.supplierapp@miami.edu with questions.

"W9 REQUESTED WAS NEVER RECEIVED – PLEASE RESUBMIT REQUEST AND UPLOAD W9 WITH THE NEW SUPPLIER REQUEST. THANKS."

7. Once the supplier has been onboarded the requestor will receive an email notification. Then a purchase requisition can be submitted.

Cancellation Tip: The requestor may receive an email notification that the request has been cancelled. This message is autogenerated if the supplier does not complete their profile within a certain time frame. Be aware, the onboarding process can still be completed, but an email notification will not be sent when the supplier becomes active in Workday for purchase requisitions.

8. [Search for the supplier](#) in UMarketplace and review the supplier's information.


Supplier Onboarding for Purchase Orders

Use this guide to onboard suppliers for Academic and Miller School of Medicine Purchase Orders.
<https://workday.miami.edu>

9. Review the Supplier Registration Information:

- **Registration Status:**
 - *Invited* - The supplier has not opened the invitation. Find the Invitation Sent to field and contact the representative to see if they need the invitation re-sent. If so, email supplychain.supplierapp@miami.edu with the RITM number to request a resend. Provide the supplier with the [Supplier Registration steps](#) and let them know the email invitation will come from UMiami@sciquest.com and that it cannot be forwarded to another employee.

AA SUBWAY, INC.



Supplier Number	p15307363
Registration Status	Profile Complete
Registration Type	Complete Supplier Application

Supplier Registration Information

Date Registered	4/22/2017 5:27 PM
Invitation Sent to	anwermys@ on 4/11/2017 9:45 PM
Invitation Sent by	Boyd Neal Barton on 4/11/2017 9:45 PM
Stakeholder	-
Last Updated	11/4/2021 9:54 AM
Profile Last Updated by Supplier	11/30/2017 10:38 AM
Registration Method	Solicited
Registration Status	Profile Complete

For assistance, contact PurchasingHelpDesk@miami.edu