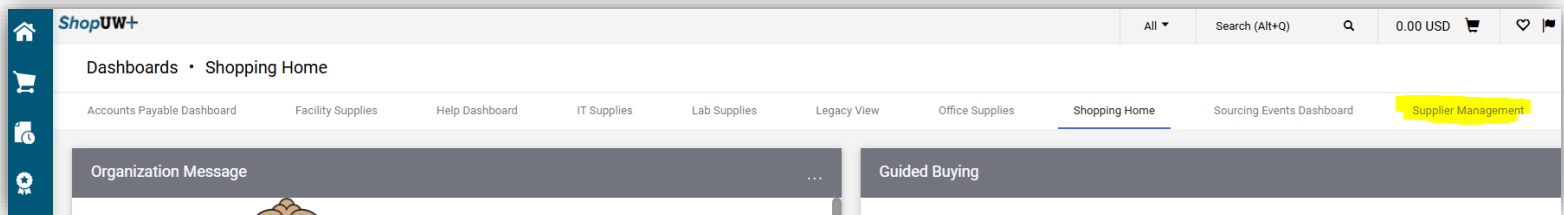


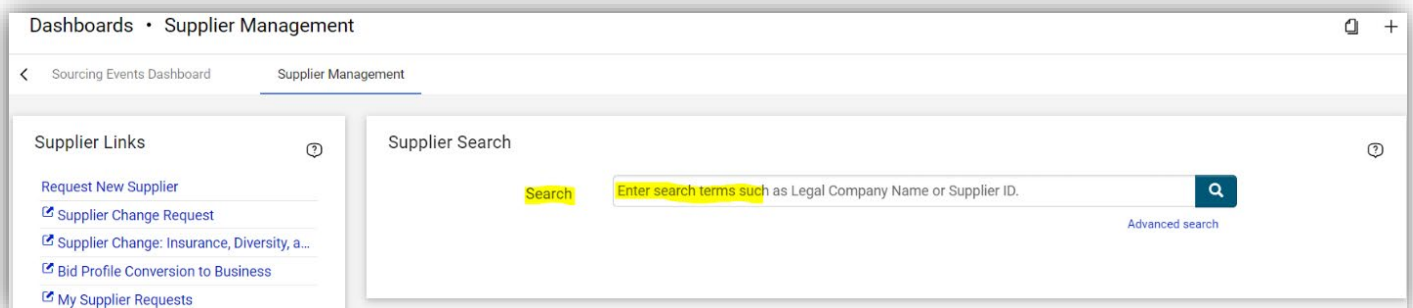
Setting Up a New Supplier in ShopUW+

A supplier can be either an individual or a business; the set-up process is listed below

1. Check to see if the individual is employed in HRS (skip this step if setting up a business) and therefore should be paid on payroll (use the Legacy Person Search in case they are employed at one of the other UW System campuses.) Your supplier request will be returned with a comment if the supplier meets either a or b requirements listed below.
 - a. If they are an active employee, pay through HRS/payroll. Non-service related appointments¹ can be paid in ShopUW+
 - b. If they have been terminated but received a paycheck within the same calendar year as the year in which you are making the payment, re-hire them into HRS and pay through payroll
 - c. If they have been terminated and received a paycheck the previous calendar year, set them up as a supplier in ShopUW+²
2. Log into ShopUW+ and navigate to the **Supplier Management** module. This is a one-stop shop where you can search for existing suppliers, create new ones, and request changes/updates to existing suppliers.



3. Search for the supplier to see if they are already registered in ShopUW+; this prevents duplicate account creation.
 - a. If they are set up as an active supplier, you will see a green check mark and the words “Enabled for Procurement.” They will also have a Supplier Number listed.
 - b. In the Contacts and Location section, under addresses, you will also be able to see the type of payment(s) the supplier is set up to receive (check vs. ACH). Please note that some suppliers have multiple payment methods (remittance) which you will be able to choose when creating the PIR/DP or PO.



NINJAS FOR HEALTH

Supplier Number 0001042785
 Registration Status None
 Registration Type Bid Profile

About
 Supplier 360
 Summary
 General
 Contacts and Locations
 Workflow and Review
 View History

Supplier 360

Supplier Details

In Network
 Enabled for Procurement
 Non-Catalog

NINJAS FOR HEALTH

Legal Name NINJAS FOR HEALTH
 DBA NINJAS FOR HEALTH
 Aliases
 Supplier No. 0001042785
 3rd Party Ref No. 0001042785 | WH=N
 MBU IDs
 Date of Last Order -
 Registration Status None

Business Description

Internal Notes
 There are no Internal Notes to display.

NINJAS FOR HEALTH

Supplier Number 0001042785
 Registration Status None
 Registration Type Bid Profile

About
 Supplier 360
 Summary
 General
 Contacts and Locations
 Contacts
 Addresses
 Locations
 Workflow and Review

Addresses

Show Inactive Addresses

Select an Address

2139 N 55TH ST (Primary Fulfillment)
 ACH-PO BOX 44963 (Primary Physical)
 ACH-PO BOX 44963 (Primary Remittance)
 ACH-PO BOX 44963 (Fulfillment)
 CHK-2566 S BRISBANE AVE (Fulfillment)
 2139 N 55TH ST (Remittance)
 9319 W RYAN CT (Remittance)
 CHK-2566 S BRISBANE AVE (Remittance)

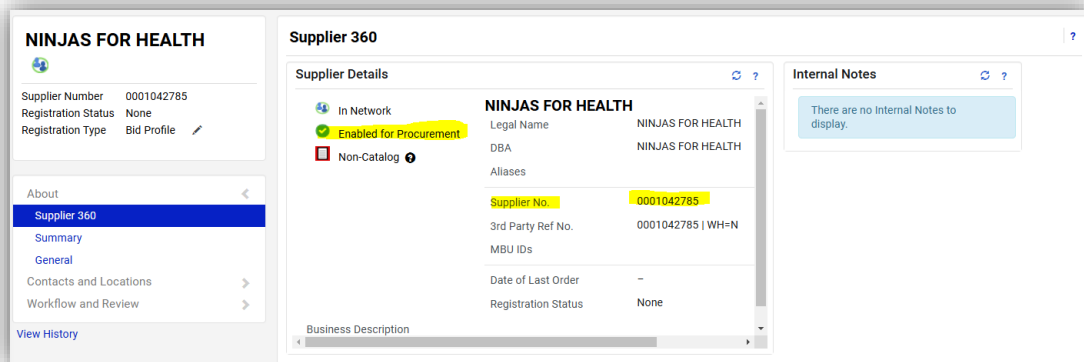
4. Submit a New Supplier Request³ from the Supplier Management module by selection “Request New Supplier.” In the first drop down “Select a supplier request form” you will see 3 options:
 - a. [New Supplier Request](#) – the supplier will receive an email invitation to register in the Jaggaer Supplier portal. They will need to provide their contact information, payment method (check or ACH), and upload W-9/W-8 tax forms.
 - b. [New Supplier Request - Long Form](#) request – if the supplier you are working with lacks access to technology or if you want to set up the supplier via proxy (meaning they would NOT have to registered through the Jaggaer portal) use this option. This is also a good option for a supplier who may have a hard time with technology. You will need to collect their completed/signed W-9 in order to complete the request.⁴ Make sure you select “No” for the invitation to register.

Do you want this supplier to receive an invitation to register in our Supplier Portal? ★

Yes No

Email Address

- c. [Supplier Request Emergency](#) - used if a PO or payment needs to be processed very quickly. If all data is provided and valid tax documentation is attached, the Supplier will be created within 1 business day.
- 5. Provide Supplier Information. Required information fields are marked with an asterisk.
- 6. Supplier Registration⁵
 - a. After you submit a new supplier request, the Shared Supplier File Administration (SSFA) team will email an invitation to the supplier to register in the Jaggaer Supplier Portal (unless you are using the Long Form request in which case they will not receive an invitation). They will be required to complete information such as address, payment method, and upload a current [W-9](#) or [W-8 BEN](#) (used for foreign individuals).
- 7. Approval Process
 - a. Once the supplier has completed their registration, the Shared Supplier Team reviews all information and if approved, the supplier will be enabled for procurement.
 - b. The supplier will be issued a supplier number and their status will say “Enabled for Procurement.” The supplier number is necessary for initiating the PIR (payment to individual request), DP (direct payment, used for businesses) or a requisition for a PO.



- c. You will receive a confirmation email once the supplier is fully set up and ready to do business with UW-Madison

If you encounter issues, contact the UW System Shared Supplier File Administration Team at SupplierFile@busssvc.wisc.edu or (608) 262-5748

¹The below are [Non-Service Related Appointments](#) so you can pay them in ShopUW+ even if they are in HRS (just make sure they don't have an additional appointment that would make them an employee). Student Hourlies (SH) are considered employees and so are employees of other UW-System campuses

- Advanced Opportunity Fellow (SA001)
- Fellow (SA002)
- Trainee (SA013)
- Postdoctoral Fellow (PD003)
- Postdoctoral Trainee (PD004)
- Grad Intern/Trainee (PD001)
- Scholar (SA010)
- Any zero dollar appointment

²Note that you cannot use a UW email address for a supplier.

³You must have a requester role in ShopUW+ before you can submit requests for new suppliers or supplier edits.

⁴Suppliers entered via a long form request can only be paid via check or bank wire. ACH banking information is only collected through the Jaggaer Supplier portal. You can also add ACH information to the supplier after they are set up in the system by completing a [Supplier Change Request](#) form.

⁵Sometimes the invitation email will go to junk. It's a good idea to email the supplier before starting this process to let them know to be on the lookout for an invitation. The invitations are different depending on if they are a [business](#) or an [individual](#).

FAQs

What are the different types of Request Status?

- "Incomplete" means a requester started a New Supplier Request and either did not complete all the required fields or did not check the Certification box and click on Complete Request.
- "Under Review" means the SSFA team has the request for review but has not sent out an invitation yet.
- "Returned" means the SSFA team sent the request back to you to get more information or clarification.
- "Rejected" means the SSFA team returned the request back to you, most likely for a duplicate supplier in the system, and cannot be resubmitted.
- "Approved" means the SSFA team has sent an invitation to register to the supplier.

What does it mean if a supplier has a Registration Status of "none"?

Supplier status refers to the point in time progress of a supplier registration and profile set up. It helps you track what stage your submitted supplier requests are in. There are several statuses:

- **None:** Supplier has not been invited to register
- **Invited:** Supplier has been invited to register. However, the supplier has not yet responded to the invitation by activating their login
- **In Progress:** Supplier has been invited to register and has begun entering information into their registration profile but has not yet submitted the profile
- **Profile Complete:** Supplier has completed all required fields on registration and submitted. The registration is with the SSFA team for review and approval
- **Rejected:** SSFA team has rejected the supplier registration based on the information provided
- **Approved:** Supplier has completed registration and it has been approved by the SSFA team

What is the Jaggaer Supplier Portal and how does it work with ShopUW+?

New supplier will be invited to register through the Jaggaer supplier portal which feeds into ShopUW+. The portal is used by suppliers to provide and update information in a secured environment to help expedite their transaction and payment processing. The supplier portal saves information such as supplier contact information, payment addresses, and tax forms. The supplier portal is a secure, single point of entry for suppliers to review their record and update information. W-9/W-8 tax forms can be auto-populated and digitally signed via DocuSign in the portal. Additionally, it provides suppliers with the ability to securely provide banking information for Automated Clearing House (ACH) payments and to upload insurance certificates when required.

How do we pay a supplier who is unresponsive to the invitation to join our supplier portal?

This is a rare occasion; however, here are the proactive steps that SSFA performs: an invitation to register is sent to the supplier, after 5 days a reminder email is sent to the supplier, after another 5 days another reminder email is sent to the supplier. If the supplier has not registered after 14 days, the SSFA team will send an email to the supplier via DocuSign with information to complete so the supplier can be added to ShopUW+. If the supplier still does not reply, the SSFA team may contact the requester to see if they are able to engage the supplier and explain the importance of providing the information if the supplier wishes to do business with the University.

Is it mandatory for suppliers to register for ACH payments?

Automated Clearing House (ACH) payments allow funds to be directly deposited into supplier accounts, replacing paper checks that may require a trip to the bank to deposit or that may be lost in the mail. Although registering for ACH payments through our secure Supplier Portal is preferred, it is not mandatory. If they do not register for ACH payments, they will receive a paper check and it will take longer to process payments.

What should campus contacts do if a supplier sends them a new email address, a remittance address change, or a change to banking or other information?

Campus contacts should submit a [Supplier Change Request](#) form.

How do I get an inactive supplier reactivated in ShopUW+?

Submit a [Supplier Change Request](#) form. Select the Reactivate Supplier box and include the business purpose for reactivation

What is Out of Band Verification and how do I know if I need to attach it?

Out-of-band verification (OOBV) is a related [System policy](#) where validation of changes requires a secondary verification method through a separate, independent communication channel or network. If you submit a Supplier Change Request as a result of an email from the supplier, you *must* attach the email with your Supplier Change Request form. The SSFA will complete the OOBV step when making a proxy change to the supplier record. Or, if you have completed verification of the change request through an independent channel, please attach it to your request.

Additional Resources

Business Services Processing Payments to Employees

<https://businessservices.wisc.edu/accounting/tax-compliance-and-reporting/processing-payments-to-employees/>

ShopUW+ Supplier Manager User Resources

<https://shopuwplus.wisc.edu/supplier-manager/>

ShopUW+ Supplier Manager Video

<https://uwservice.wisconsin.edu/docs/pd/shopuw/shop-supplier-request-demo/index.html>

UW-Madison Policy Library Payments to Individuals

<https://policy.wisc.edu/library/UW-3003>