Supplier Onboarding Registration
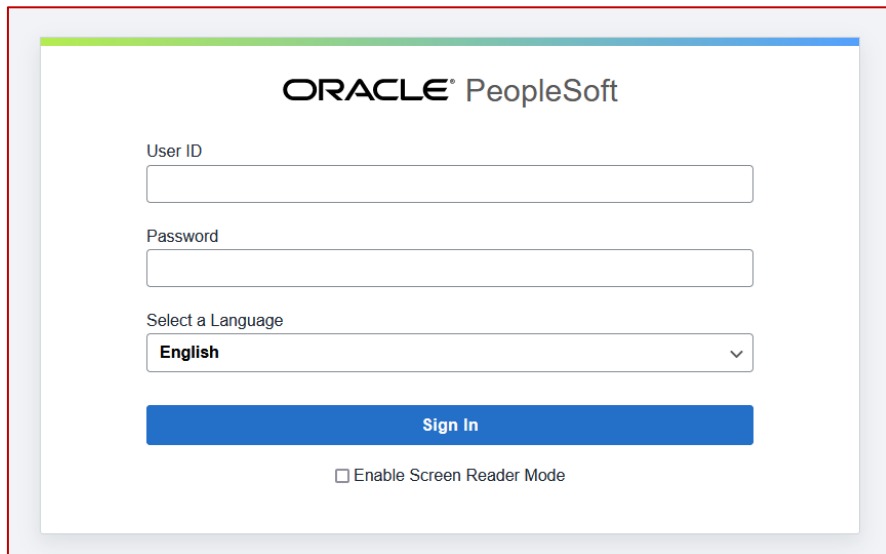
Quick Reference Guide

Please follow the directions, step by step. If you receive an error message, please read the message closely and go back through the steps to make sure you are not missing something.

It is recommended that you use Microsoft Edge or Google Chrome. If you are having an issue with logging in, please try a different type of browser, you may need to clear your cache.

1. ## NOTIFICATION

   - You will receive an email from acctspay@louisville.edu with a guest login, a link to the Supplier Onboarding Portal and instructions.

   - Sign into portal with User ID and Password provided from email.

STEP 1 – WELCOME

1. Make sure you have all the documentation required for onboarding.
   ➢ Completed an electronic W-9 form, a blank copy can be found [here](#).
   ➢ Banking information for direct deposit/electronic payments.

2. **SELECT AN ACTIVITY:**
   - Start a new registration form and select what entity you are representing:
     ➢ Business
     ➢ Individual
   - Continue from where you left
     ➢ Enter Registration ID
   - All fields that have asterisks (*) are required fields or will be noted on this guide.

3. Click on *Next*.

STEP 2 – IDENTIFYING INFORMATION

1. **UNIQUE ID & COMPANY PROFILE**

   - **Tax Identification Number:** Enter your Federal Tax Identification Number or Social Security Number (No spaces or dashes.)

   - **Entity Name:** Business Name or Name of Individual (Name should be same as W-9 and should match the name on file with the IRS.)

   - **W-9 Form:** A W-9 form is the IRS's Request for Taxpayer Identification Number and Certification. This document provides us with your formal, legal name, your taxpayer number and your classification. This information is used to determine taxability and reportability of payments per the IRS's 1099-Misc. guidelines. You can find a fillable W-9 on the IRS website.

2. Fill out *Tax Identification Number* and *Entity Name*, then attach and upload W-9 by clicking on *Add W-9 Attachment*.

3. Select **Upload**.

4. Click *Choose File* and locate where you have your document saved on computer.

5. Click *Upload* – you should see your file selected (*example: W-9_Company XYZ.pdf*).
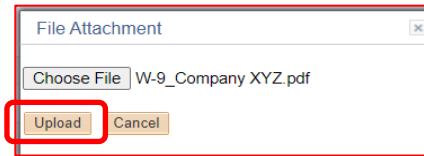
6. Click *View* to verify you have uploaded the proper document and then *Return* after verifying.

- If the View button is grayed out, then your W-9 did not upload. Please view *Common Issues* below.
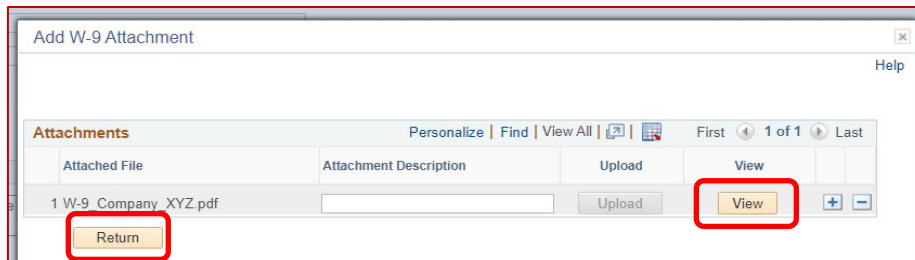

- **Common issues with W-9 Forms**
  - ➢ File size is too big. Try reducing the size (should be 2MB or less.)
    - • Reducing Adobe files: Document > Reduce File Size.
    - • Reducing picture: Make sure your resolution is 150 dpi or smaller.
  - ➢ W-9 not completely filled out:
    - • Entity Name not provided or incorrect.
    - • Tax Identification Number not provided.
    - • Section 3 is not complete

7. After clicking *Return*, it will bring you back to STEP 2.
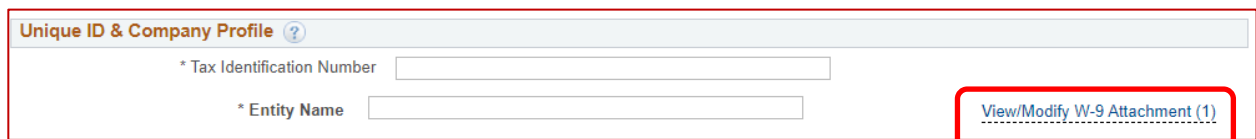
8. **PROFILE QUESTIONS**

- Providing this information will help determine eligibility for approval of your registration. All questions must be answered to proceed to next step. To expand the question window, select the small arrow in the upper right corner. **Again, any question with an asterisk (*) is required.**
  - ➢ Please note, the questions may vary depending on Entity selected (Business vs. Individual) in *Step 1 - Welcome*.

Profile Questions (?)

Please provide the name and contact information (email or phone number) of the person who referred you to the Supplier Registration site.

* How do you prefer to receive purchase orders from the University of Louisville? Please provide email or physical mailing address.

* Do you accept credit card payments?

* What type of product or service are you providing to the University of Louisville?

* Is your organization required by law, in the state of Kentucky, to hold specific licenses and/or qualifications?

If yes have these requirements been met and are they up-to-date?

* Have you ever been or are you currently excluded, suspended, debarred or otherwise deemed ineligible to participate in government healthcare, procurement, or other programs?

If yes to the above question, list all such exclusions, suspensions, or debarments, including applicable governmental agency, action date, and your address at the time of the action.

* Have you ever been charged with or been convicted of a criminal offense related to the provision of government healthcare, procurement, or other programs and have not been reinstated in such programs after a period of exclusion, suspension, debarment, or ineligibility?

If yes to the above question, please explain.

* Are you, your spouse or dependent children employed by the University of Louisville or any of its affiliates?

If yes, please give the name of the individual, their area of employment and your relationship/connection to this person.

ATTACH CERTIFICATES HERE: If choosing Small Disadvantaged Business or Other Preference Programs (see Additional Reporting Elements section), you must attach certificate validating your status. If choosing Minority, Women-Owned, Veteran Or Disabled, please attach any certificates that you have.   Attachment

9. ADDITIONAL REPORTING ELEMENTS

- Please review fields below and enter where applicable.

- If **NONE** apply below, you must select **None of the Above** or you will receive an error message.


- Pop-up error message if at least **ONE** item is not checked (*Minority, Women-Owned Business, Veteran, Disabled, None of the Above*).

- Error message will appear at top with issue in red verbiage.

OR

10. Another error could be **duplicate TIN**. This happens when a supplier has previously registered with the University but needs to re-register as they have become inactive after 12-18 months of no payments through AP system.

- Click on the blue *Return* arrow, which will take you back to where you entered your TIN.

- A pop-up message will appear: *Please enter a valid Standard ID Number or choose Next to proceed further with duplicate ID number*. Click **OK**.

- This will take you back to main screen and you would click on *Next*, which allows you to proceed with registration.
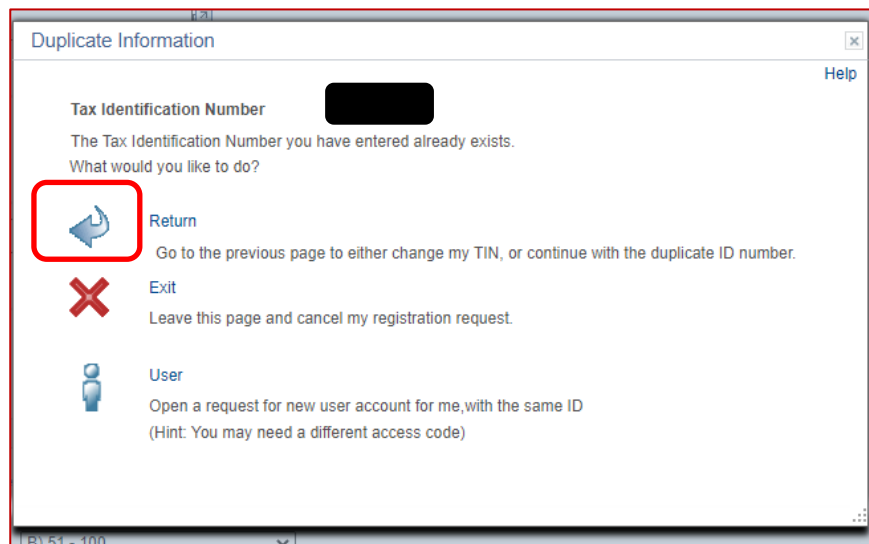
11. Correct any issues you might have from above and click *Next*.

STEP 3 – ADDRESSES

1. PRIMARY ADDRESS

- If you or the business you represent has only one address from which it conducts all procurement functions (ordering, invoicing, remitting, and returning), enter that address here.

- To enter different addresses for different procurement functions, add the information in the next section for Other Addresses.

2. OTHER ADDRESSES:

- Select all applicable address check boxes to add addresses that are different from your **Primary Address**.

STEP 4 – CONTACTS

1. COMPANY CONTACTS

- Use the Contacts page to add your contact information during new supplier registration. You can also delete or update your contact information on this page later.

- Click the **Add Contact** button to create a new user for this account, including all required contact information. You can edit contact information by clicking the appropriate Name link.

2. CONTACT INFORMATION

- Enter contact information, such as your name, telephone, and email address.

- Fields with an asterisk (*) are required.

- You can enter multiple email addresses, but they must be separated by a semicolon (;).

3. USER PROFILE INFORMATION

- Enter your preferred user ID or username. If the user ID you have requested already exists, you may receive a modified user ID by email when your registration is confirmed.

    ➢ Please do **NOT** use the **@** symbol in the creation of your UserID.

- You will use your user ID and password to log into the supplier portal, **_VIEW ONLY_** access. Please include your business/company or name if individual in the Description field.

    ➢ Please note, to make changes to your profile after you have received **Supplier ID**, please email acctspay@louisville.edu for updates.

4. After information has been reviewed, please proceed by clicking **Next**.

STEP 5 – PAYMENT INFORMATION

1. PAYMENT PREFERENCES

- The University of Louisville standard vendor payment is EFT/ACH. If you would like to be paid via credit card, please contact acctspay@louisville.edu after your application has been submitted. Someone from the University will contact you.

- Please enter a **VALID** email address – please double check that you have entered it correctly, otherwise you will not receive notifications regarding payments or other correspondence.

- Best practice is to use a general service account for Business Entities instead of an individual's email when possible.

2. SUPPLIER BANKING INFORMATION

- The banking information that you enter here includes high-level bank and account information that will be stored with your registration record.

- Please complete the **Bank Name**, **Account Type**, **Routing Number** and **Bank Account Number**. No other fields are required to be completed.

3. If no errors, please click **Next** to proceed to final step.

STEP 6 – SUBMIT

1. ## REVIEW:

   - Click the **Review** button to review your information.

   - Enter email address(es) that will require the communication regarding your registration. You may include the departmental contact email address at this time, so they are aware of the submitted registration.

2. ## TERMS AND CONDITIONS:

   - Review the **Terms of Agreement**.

   - Click on check box to accept the **Terms of Agreement**.

3. ## SUBMIT:

   - Click **Submit**.

   - A confirmation will be provided with your **Registration ID** number. Please note, the *Registration ID* number is **NOT** your Supplier ID. After Accounts Payable reviews your information and if no further action is required, you will receive an additional email from acctspay@louisville.edu with your Supplier ID and Supplier Name.