Supplier Onboarding for Purchase Orders

Use this guide to onboard suppliers for Academic and Miller School of Medicine Purchase Orders.

https://workday.miami.edu

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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.”
   
   **TIP:** On average, the Purchasing Department can process requests in 2-3 business days. It may take suppliers weeks to gather and submit their documentation. On rare occasions suppliers decline to onboard.

3. **Diverse Suppliers** - If the supplier does not appear and an alternate can be used look for diverse suppliers that are already Active in Workday

4. **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 should have to provide insurance, have the supplier email the scope of work to Jude Chery, from UM Risk Management to request a waiver. Then attach the waiver when completing the New Supplier Request form.

Requesting a New Supplier

1. Before completing the New Supplier Request form, contact the supplier first to gather the following information:
   
   - The exact name, email, and phone number of the employee that will be completing the supplier’s application.

   **TIP:** If this step is skipped, the invitation that UM sends to the supplier can become invalid. If the supplier’s general...
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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?

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2. Log into Workday.

3. Click the UM Quicklinks app. **TIP:** If the app doesn’t appear search or edit the home screen apps.

4. Click New Supplier Request for Purchase Order.

5. Complete all fields:
   - Attach any supporting documentation.
   - **Commodity Type** – Click the magnifying glass to search. If the commodity does not appear select “Other” and specify what is being purchased.
   - Type the **Contact Name, Phone, Email**, and **physician/family status** of the person that will be completing the Supplier’s profile.
   - **Add Supplier to the Meperia System?** – (uncheck)
   - **Will this vendor be a UHealth Vendor?** – (uncheck)
   - **Business Reason** – (Describe what is being purchased and who it is for. E.g., underwater paper for scuba classes.)

6. Click **Submit Order** to being processing.

**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
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Checking the Status

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.

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.

For assistance, contact PurchasingHelpDesk@miami.edu