

## SUPPLIER REQUEST FORM – NEW DOMESTIC ENTITY

### Objective

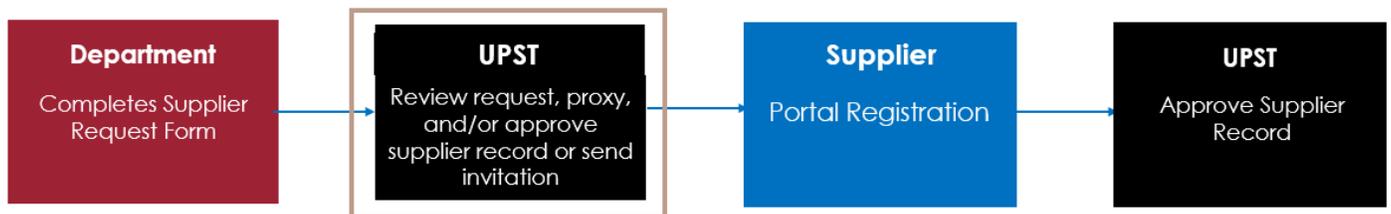
To conduct business with a supplier, the entity or individual must be onboarded and have an **“Enabled for Procurement”** status in BuyWays.

"Enabled for Procurement" in BuyWays signifies that a supplier has completed the necessary onboarding process and is now authorized to receive and fulfill purchase orders through the BuyWays system.

This job aid details how to use the BuyWays Supplier Request Form to onboard a **new domestic entity**.

After the Supplier Request Form is completed by the department and submitted, the UPST will vet the supplier request and invite, proxy, and/or update the information requested within the supplier record. [What happens after I submit my request?](#)

### Process Overview



### Additional Job Aids:

1. [Update an Existing Supplier Job Aid](#)
2. [Domestic Individual Job Aid](#)
3. [Foreign Entity & Individual Job Aid](#)
4. [BuyWays Notifications Job Aid](#)

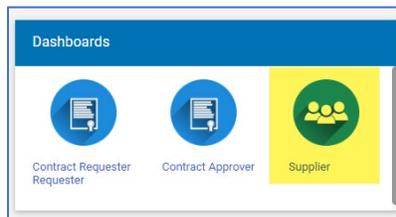
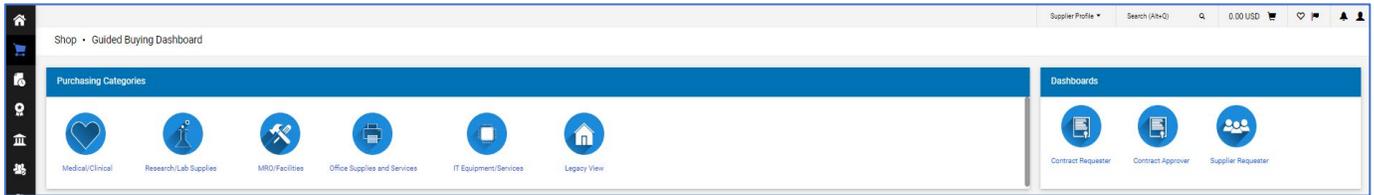
### Additional Resources

<a href="#">Supplier Request &amp; Registration Reference Guide</a>	<a href="#">Supplier Registration and Management FAQs</a>
<a href="#">Supplier Request &amp; Management Glossary</a>	<a href="#">Determination of Independent Contractor Status Questionnaire</a>

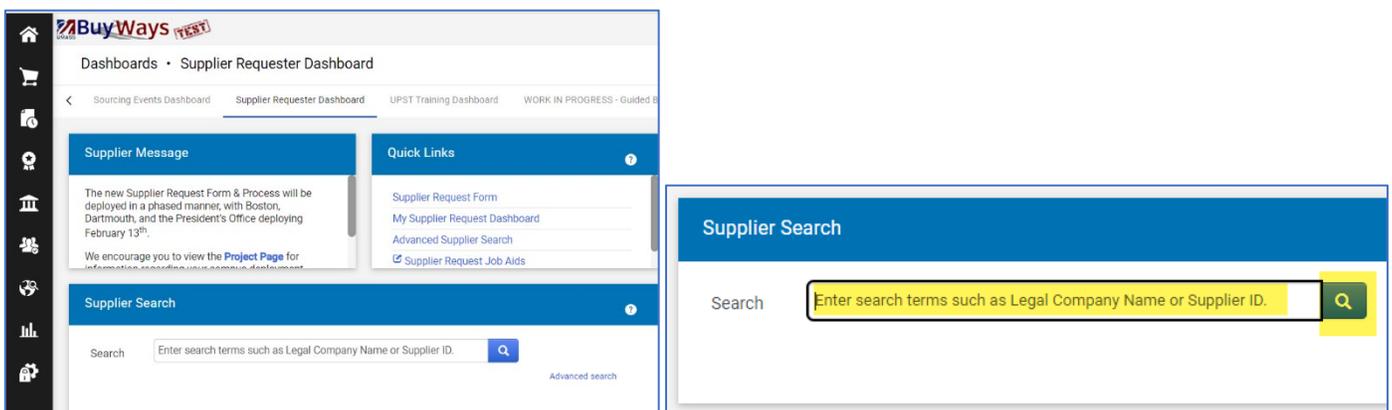
### Log Into BuyWays

[BuyWays Login \(A-B-D-L-P-M\)](#)

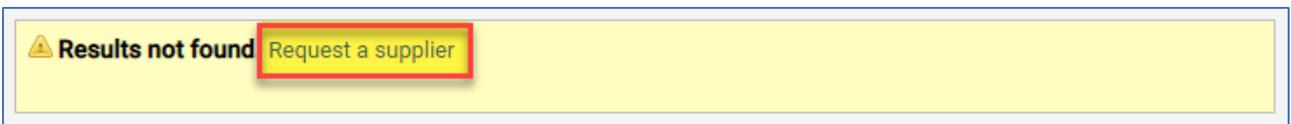
1. **Access Supplier Requester Dashboard:** From the BuyWays homepage, on the righthand side select the **Supplier Requester** Dashboard.



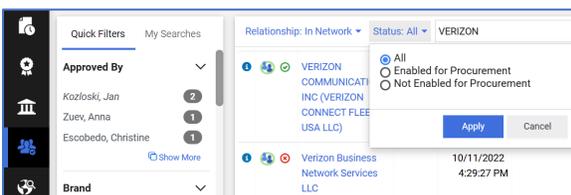
2. **Conduct a Supplier Search:** Search for the Supplier to determine if the Supplier already exists in the Supplier Database.



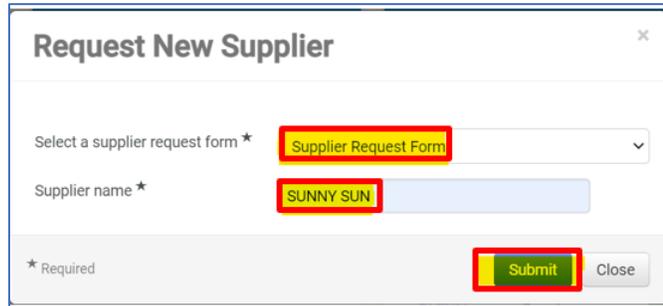
If the supplier is not found, select the **Request a Supplier** link.



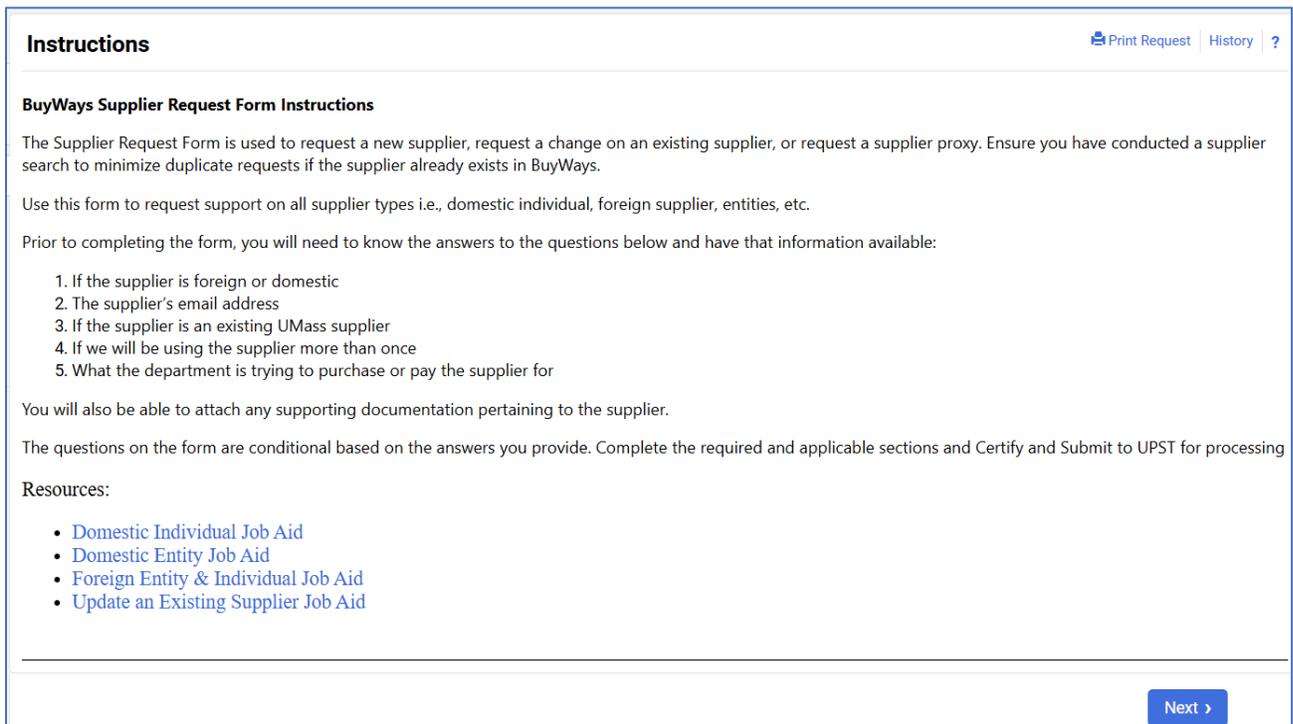
**Note:** Search results may be filtered by default. Some show "All"(Enabled and Not Enabled), while others default to 'Enabled'. To see all possibilities, select the 'All' option.



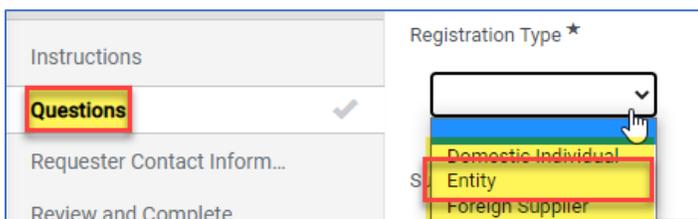
3. **Enter Preliminary Information:** You will enter some preliminary information in the Request New Supplier popup. In the request form field, click the dropdown and select **Supplier Request Form**. Next, enter the **Supplier Name** and select **Submit**.



4. **Review the Instructions:** We encourage you to read the Supplier Request Form instructions before you begin the form. It contains the information you will need to know and an outline of the process. Once finished, select **Next**.



5. **Complete the Questions:**
  - a. *Registration Type:* For the Registration Type, select **Entity**.

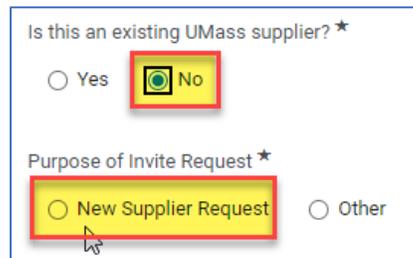


b. **Email Address:** Enter the **Supplier's email address**.

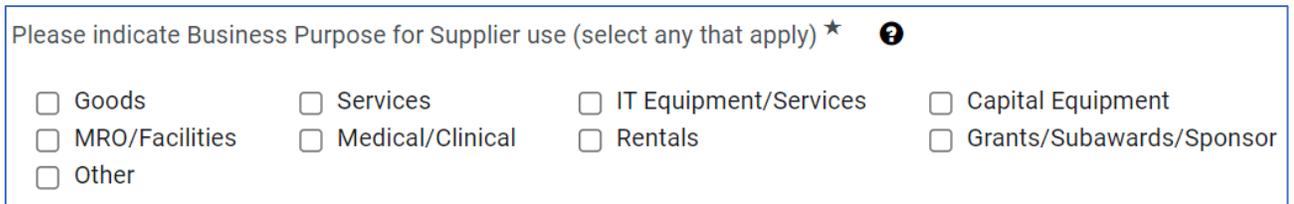


c. **Existing UMass Supplier:** Select “**No**” to determine whether this is an existing supplier.  
*Note:* If this is an existing UMass supplier, please use the [Update an Existing Supplier job aid](#).

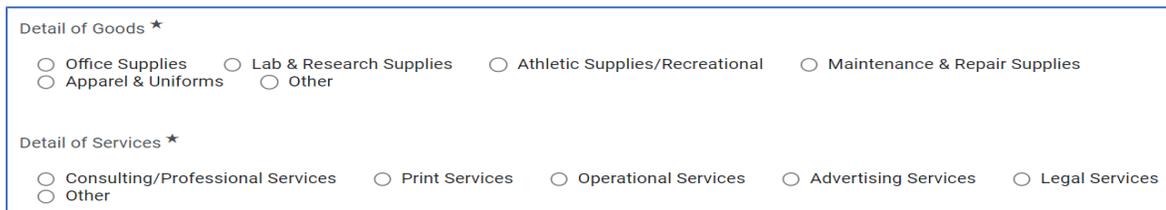
i. If selecting “**No**,” select “**New Supplier Request**” or “**Other**.” If Other, please explain.



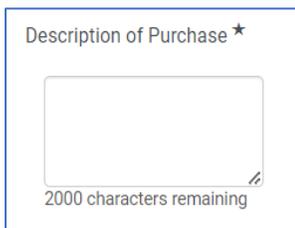
d. **Supplier Purpose:** Select why the supplier needs to be added. Multiple options can be selected.



*Note:* If “**Goods**” or “**Services**” are selected, select the most applicable option(s) that applies.



Then, in the textbox, provide details on the “**Description of Purchase**” to ensure the supplier is treated appropriately for onboarding/tax classification/payment/etc.



- e. *Additional Documentation:* Attach any additional documentation, whether a quote or statement of work (SOW), etc.

*Note:* For address updates, additional documentation is required, such as a supplier letter, invoice, etc.

Do you have a Supplier quote and/or additional documentation?

Yes    No

- 6. **Select Next:** At the bottom of the page, select **Next**. The **Requester Contact Information** page captures the requester details in case the UPST needs to contact the department.

**SUNNY DAYS INC**   **Requester Contact Information**   [Print Request](#)   [History](#)   [?](#)

Template: **Supplier Request Form**

Request Status: **Incomplete**

Instructions

Questions

**Requester Contact Infor...**

Review and Complete

Supplier Request Workflow

Requester Name: Claudia Cortes

Requester Email: ccortes@umassp.edu

Requester Phone Number: +1 774-455-7100

Requester Business Unit: Dartmouth

◀ Previous   **Next** ▶

- 7. **Complete Request:** In the **Review and Complete** section, check off the certification and select **Complete Request**. The form will automatically route to the UPST for review.

**Certification**

certify that the statements and information in this request are true and correct to the best of my knowledge and belief.

★ Required

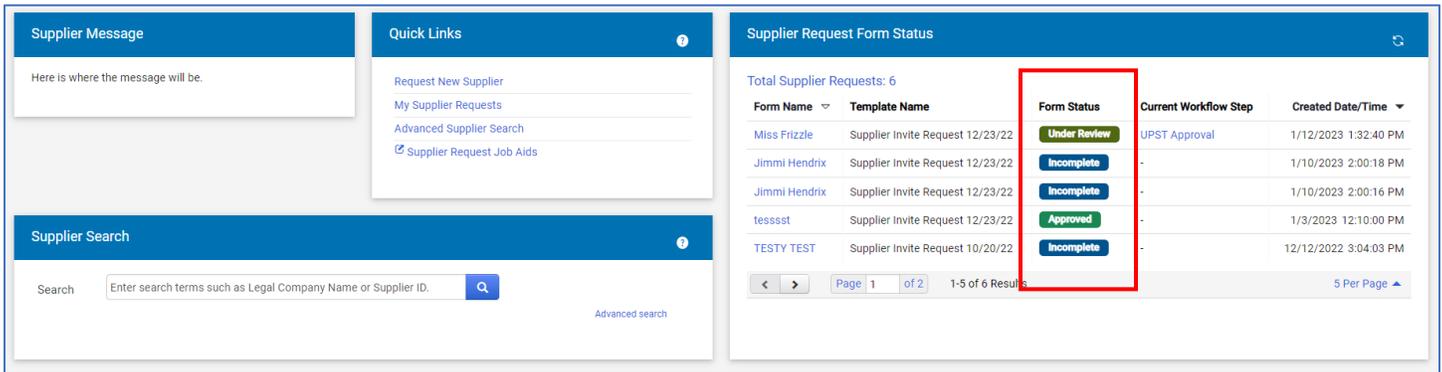
◀ Previous   **Complete Request**

## After You Complete Your Request

After the Supplier Request Form is completed and submitted by the department, the requester can see the status on their Supplier Request dashboard. If the supplier takes no action within two weeks (14 days), the department/campus will be notified of the next steps.

To ensure complete transparency, the new **My Supplier Requests** dashboard provides a status as the request moves through the entire process. Complete self-service!

### The Supplier Request Form Status

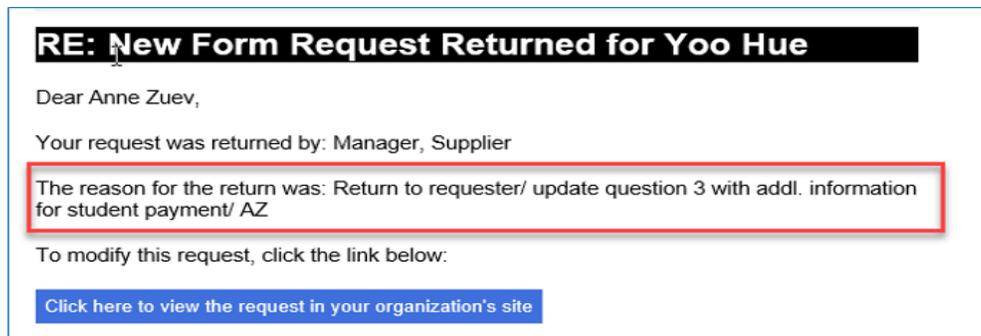


Form Name	Template Name	Form Status	Current Workflow Step	Created Date/Time
Miss Frizzle	Supplier Invite Request 12/23/22	Under Review	UPST Approval	1/12/2023 1:32:40 PM
Jimmi Hendrix	Supplier Invite Request 12/23/22	Incomplete		1/10/2023 2:00:18 PM
Jimmi Hendrix	Supplier Invite Request 12/23/22	Incomplete		1/10/2023 2:00:16 PM
tesstt	Supplier Invite Request 12/23/22	Approved		1/3/2023 12:10:00 PM
TESTY TEST	Supplier Invite Request 10/20/22	Incomplete		12/12/2022 3:04:03 PM

The Supplier Request Form status are listed below:

Supplier Request Status	Meaning
Incomplete	Request form that is still with the requester and has not been submitted for review or approval.
Returned	Request form was returned for additional information or documents.
Rejected	Request form was rejected and cannot be processed. Ex: duplicate supplier, supplier not needed, stakeholder requested.
Under Review	Request form that has been submitted and is in the queue to be processed/approved.
Approved	Request form that has been fully approved by UPST and UPST will proxy/send invite.

If your Supplier Request Form is **Returned**, you will receive an automated email from BuyWays providing the reason and necessary next steps.



**RE: New Form Request Returned for Yoo Hue**

Dear Anne Zuev,

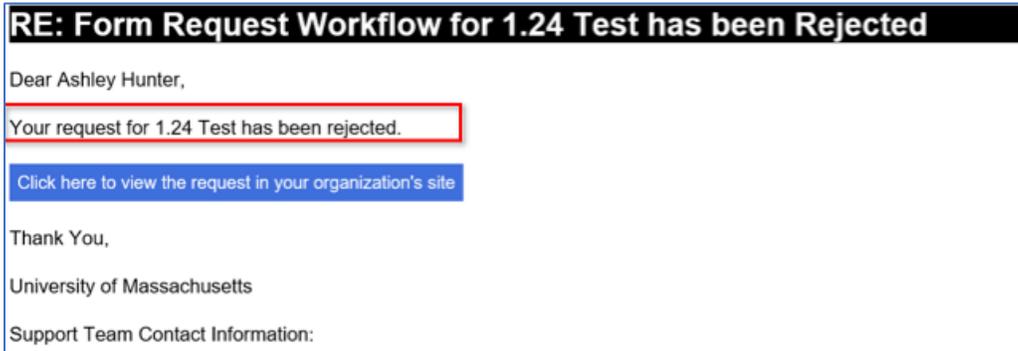
Your request was returned by: Manager, Supplier

The reason for the return was: Return to requester/ update question 3 with addl. information for student payment/ AZ

To modify this request, click the link below:

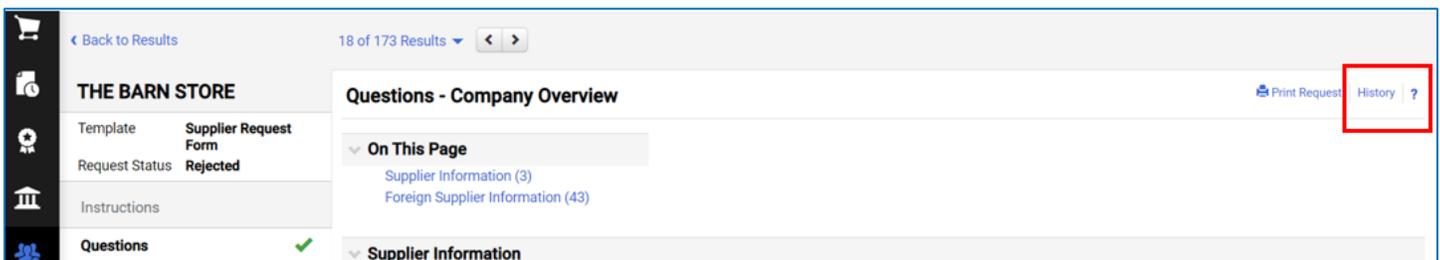
[Click here to view the request in your organization's site](#)

If your Supplier Request Form is **Rejected**, you will receive an automated email from BuyWays stating it was rejected.



To understand why it was rejected, go to your original form and select **History**. The UPST team will leave the reason why it was rejected. A reject message is not always due to a duplicate vendor. A possible reason is that a record has been internally managed. Please check the history tab of your request form to see the full message.

<input type="checkbox"/>	Form Name	Request Number	Form Status	Created Date/Time	Template Name
<input type="checkbox"/>	THE BARN STORE	754428	Rejected	2/10/2023 9:37:27 AM	Supplier Request Form



Date	User	Action	Section	SubSection	Context	Field	Old Value	New Value	Note
2/10/2023 12:55:16 PM	Supplier Manager	Form Request Rejected			Supplier Registration Workflow: UPST Approval				testing reject

## The Supplier Request Form Workflow Steps

My Supplier Requests									
Requested Supplier, Template Name <input type="text"/>									
Request Status * <input checked="" type="checkbox"/> Approved <input checked="" type="checkbox"/> Incomplete <input checked="" type="checkbox"/> Rejected <input checked="" type="checkbox"/> Returned <input checked="" type="checkbox"/> Under Review <input checked="" type="checkbox"/> Completed									
Include public Supplier request form? <input type="checkbox"/>									
<input type="button" value="Apply"/>									
1-6 of 6 Results <span style="float: right;">10 Per Page</span>									
Requested Supplier	Template	Request Status	Workflow Step	Workflow Assignee	Status Last Updated	Created	Supplier Profile	Registration Status	
Maya Angelou	Supplier Invite Request 12/23/22	Under Review	UPST Approval	-	1/18/2023 2:11 PM	1/18/2023 2:06 PM		-	<input type="button" value="Actions"/>
Miss Frizzle	Supplier Invite Request 12/23/22	Approved	W8 Request Approval	-	1/18/2023 10:28 AM	1/12/2023 1:32 PM	Miss Frizzle	Invited	<input type="button" value="Actions"/>
Junie B	Supplier Invite Request 12/23/22	Incomplete	-	-	1/17/2023 12:14 PM	1/17/2023 12:14 PM		-	<input type="button" value="Actions"/>
Jimmi Hendrix	Supplier Invite Request 12/23/22	Incomplete	-	-	1/10/2023 2:00 PM	1/10/2023 2:00 PM		-	<input type="button" value="Actions"/>
tesssst	Supplier Invite Request 12/23/22	Approved	Foreign Source	-	1/5/2023 2:25 PM	1/3/2023 12:10 PM	tesssst	None	<input type="button" value="Actions"/>
Gorgeous Jones	Supplier Invite Request 10/20/22	Rejected	-	-	11/18/2022 11:55 AM	11/18/2022 11:53 AM		-	<input type="button" value="Actions"/>

The Supplier Request Form workflow steps are listed below:

Supplier Workflow Steps	Meaning
UPST Approval	The Form Request is <b>with UPST</b> and awaiting approval.
Duplicate Name	The Form Request is <b>with UPST</b> and awaiting approval.
Student/Employee Review	The Form Request is <b>with UPST</b> and awaiting approval. Because this involves a student/employee, UPST will conduct the appropriate due diligence to review the request and determine the appropriate processing.
Foreign Source	The Form Request is <b>with UPST</b> and awaiting approval. Because this involves a foreign supplier, UPST must reach out to the supplier for the correct forms.
Foreign Reimbursement Review	The Form Request is <b>with UPST</b> and awaiting approval. Because this involves a foreign supplier, UPST must reach out to the supplier for the correct forms.
W8 Request Approval	The Form Request is <b>with UPST</b> and awaiting approval.
Other review	The Form Request is <b>with UPST</b> and awaiting approval.
Glacier/Treasury Review	The Form Request is <b>with the Treasury's Office</b> . The request requires additional action for the Glacier invite registration. The Glacier registration is to be completed, and the documentation is to be submitted to proceed with final approval and foreign supplier setup.
Pending Documentation	The Form Request is <b>with the supplier</b> . The necessary documentation has been sent out to the supplier, and UMass is waiting for the supplier to submit the completed documentation.