

SUPPLIER REQUEST FORM – NEW DOMESTIC INDIVIDUAL

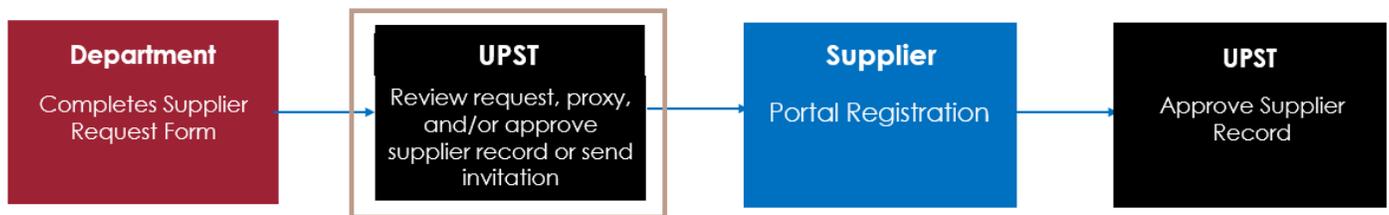
Objective

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 Entity Job Aid](#)
3. [Foreign Entity & Individual Job Aid](#)
4. [BuyWays Notifications Job Aid](#)

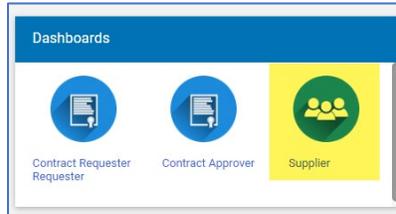
Additional Resources

Supplier Request & Registration Reference Guide	Supplier Registration and Management FAQs
Supplier Request & Management Glossary	Determination of Independent Contractor Status Questionnaire

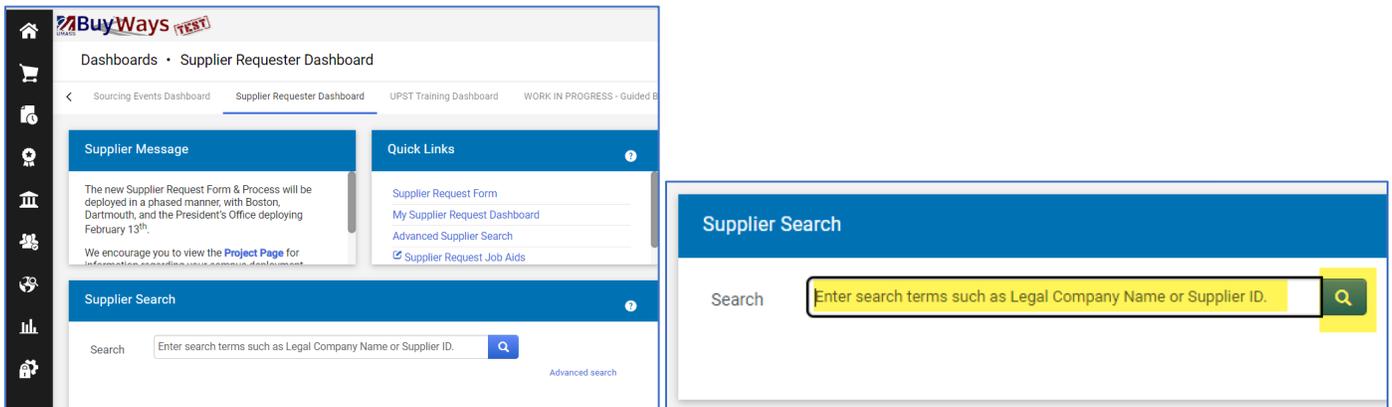
Log Into BuyWays

[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.



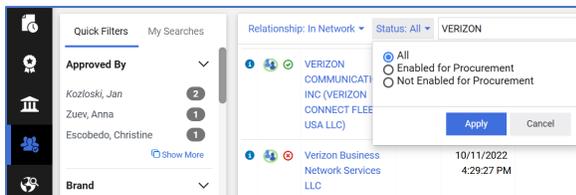
- 2. Conduct a Supplier Search:** Search for the Supplier to determine if the Supplier already exists in the Supplier Database.



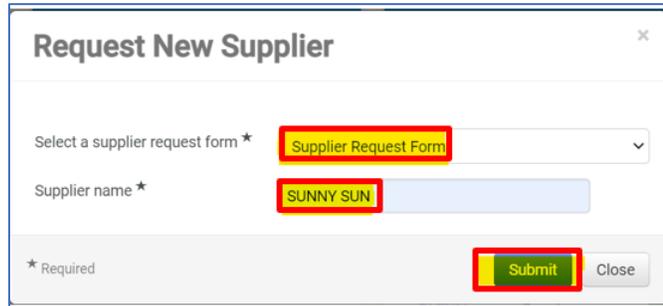
If the supplier is not found, select the **Request a Supplier** link.



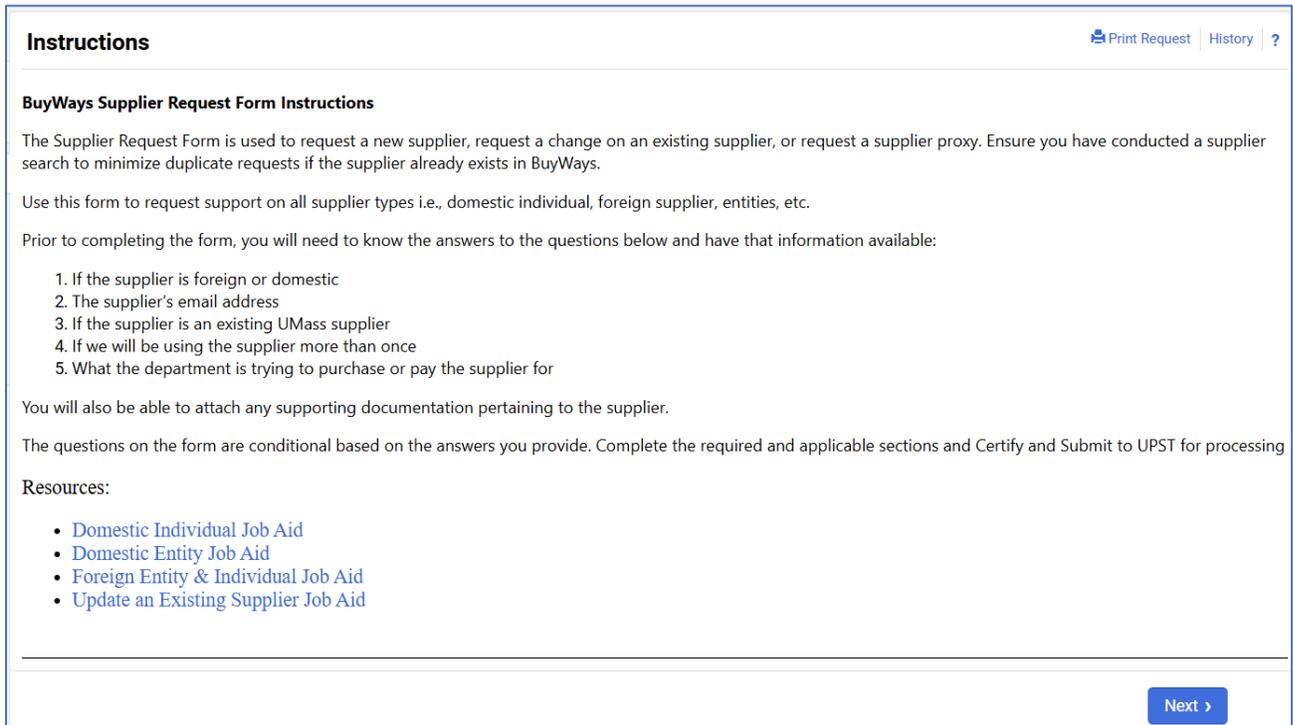
Note: Search results may be filtered by default. Some show "All"(Enabled and Not Enabled), while others default to 'Enabled'. To see all possibilities, select the 'All' option.



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**.



Instructions Print Request | History | ?

BuyWays Supplier Request Form Instructions

The Supplier Request Form is used to request a new supplier, request a change on an existing supplier, or request a supplier proxy. Ensure you have conducted a supplier search to minimize duplicate requests if the supplier already exists in BuyWays.

Use this form to request support on all supplier types i.e., domestic individual, foreign supplier, entities, etc.

Prior to completing the form, you will need to know the answers to the questions below and have that information available:

1. If the supplier is foreign or domestic
2. The supplier's email address
3. If the supplier is an existing UMass supplier
4. If we will be using the supplier more than once
5. What the department is trying to purchase or pay the supplier for

You will also be able to attach any supporting documentation pertaining to the supplier.

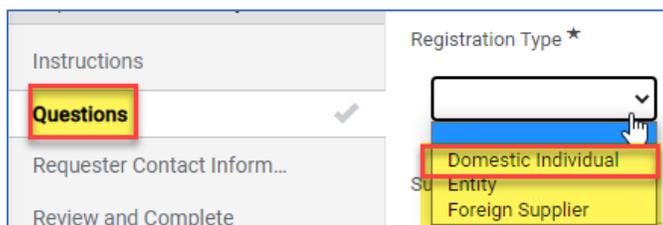
The questions on the form are conditional based on the answers you provide. Complete the required and applicable sections and Certify and Submit to UPST for processing

Resources:

- [Domestic Individual Job Aid](#)
- [Domestic Entity Job Aid](#)
- [Foreign Entity & Individual Job Aid](#)
- [Update an Existing Supplier Job Aid](#)

Next >

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



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



Email Address * 

Enter the supplier's email address.

* Required

c. **Existing UMass Supplier:** Select "**No**" to 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.



Is this an existing UMass supplier? *

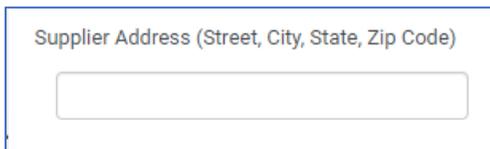
Yes No

Purpose of Invite Request *

New Supplier Request Other

d. **Supplier Address:** Enter the **Supplier Address** if known for the new Supplier.

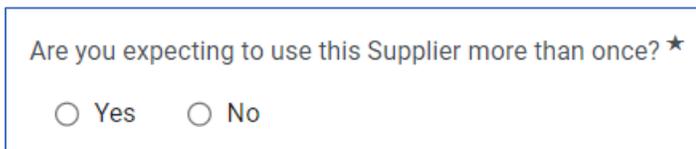
Note: If an address update is requested for an existing Supplier, the **Supplier Address** is required.



Supplier Address (Street, City, State, Zip Code)

e. **Use Supplier More Than Once:** Select the appropriate radio button, **Yes**, or **No**, on whether this is a one-time payment or for multiple payments.

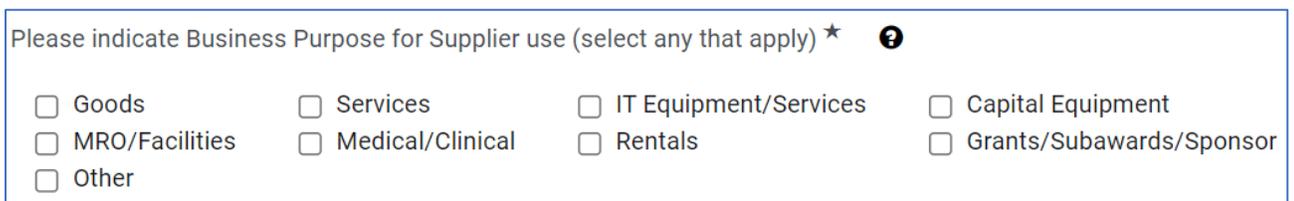
Note: If unsure whether the Supplier will be paid more than once, select **Yes**.



Are you expecting to use this Supplier more than once? *

Yes No

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



Please indicate Business Purpose for Supplier use (select any that apply) * 

<input type="checkbox"/> Goods	<input type="checkbox"/> Services	<input type="checkbox"/> IT Equipment/Services	<input type="checkbox"/> Capital Equipment
<input type="checkbox"/> MRO/Facilities	<input type="checkbox"/> Medical/Clinical	<input type="checkbox"/> Rentals	<input type="checkbox"/> Grants/Subawards/Sponsor
<input type="checkbox"/> Other			

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

Description of Purchase ★

2000 characters remaining

- g. *Current or Recently Terminated UMass Employee/Student/Scholar*: Select the appropriate radio button, **Yes**, or **No**, on whether this is a current or recently terminated UMass employee, student, or scholar. Based on the answer, a Student ID or an Employee ID may be required.

Is the individual a current or recently terminated UMass employee (Faculty or Staff)? ★

Yes No

Is the individual a current or recent UMass student or research scholar? ★

Yes No

- h. *Additional Documentation*: Attach any additional documentation, whether a quote or the ‘Determination of Independent Contractor Status’ form, etc.

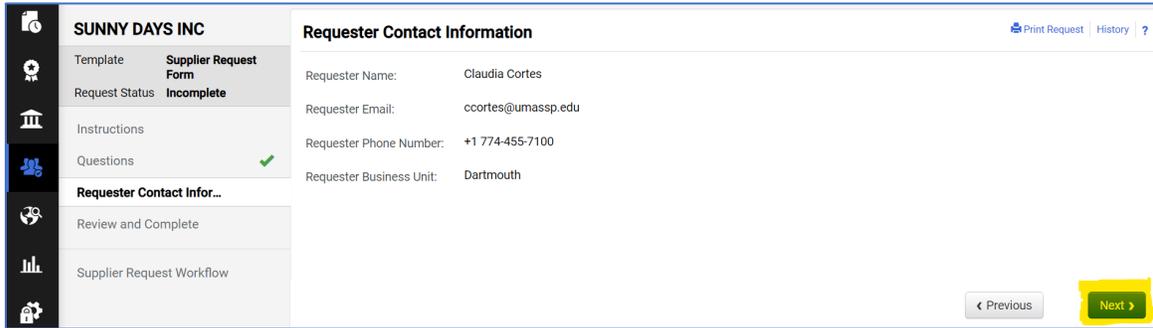
Note: HR approval is required to determine the status of an independent contractor when the contract is with an individual. Based on the responses in the Determination of Independent Contractor Status form, the HR approver determines whether the individual should be processed through BuyWays as a supplier or through the HR system as an employee. The proper classification of individuals in the workplace is essential to the university, and this form review/approval serves as official documentation of the determination of independent contractor status

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

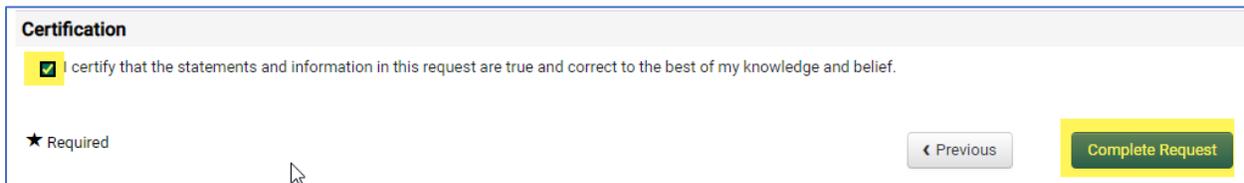
Do you have a Supplier quote and/or additional documentation?

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.



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

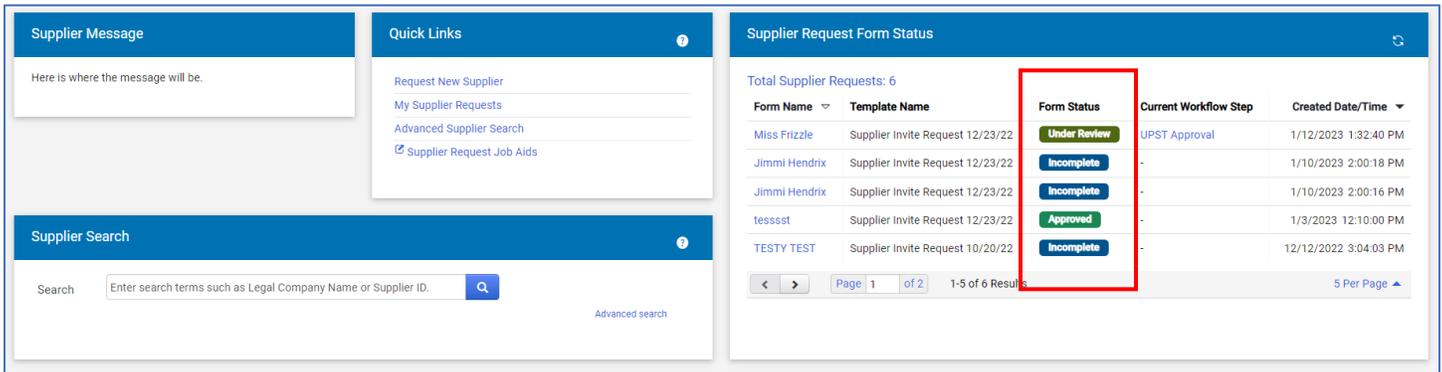


After You Complete Your Request

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

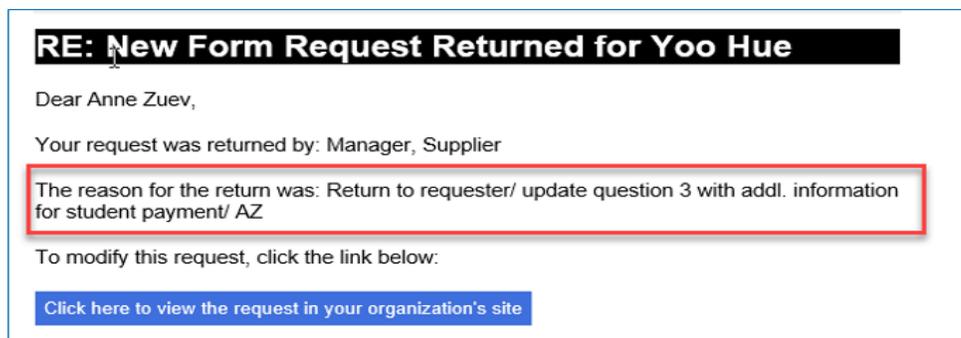


Form Name	Template Name	Form Status	Current Workflow Step	Created Date/Time
Miss Frizzle	Supplier Invite Request 12/23/22	Under Review	UPST Approval	1/12/2023 1:32:40 PM
Jimmi Hendrix	Supplier Invite Request 12/23/22	Incomplete		1/10/2023 2:00:18 PM
Jimmi Hendrix	Supplier Invite Request 12/23/22	Incomplete		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 add. 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.

RE: Form Request Workflow for 1.24 Test has been Rejected

Dear Ashley Hunter,

Your request for 1.24 Test has been rejected.

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

Thank You,

University of Massachusetts

Support Team Contact Information:

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

THE BARN STORE

Template: Supplier Request Form
Request Status: Rejected

Questions - Company Overview

On This Page:
Supplier Information (3)
Foreign Supplier Information (43)

Supplier Information

Print Request History ?

Page 1 of 2 1-20 of 27 Results 20 Per Page

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 10 Per Page									
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"/>
tsssst	Supplier Invite Request 12/23/22	Approved	Foreign Source	-	1/5/2023 2:25 PM	1/3/2023 12:10 PM	tsssst	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 with UPST and awaiting approval.
Duplicate Name	The Form Request is with UPST and awaiting approval.
Student/Employee Review	The Form Request is with UPST 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 with UPST 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 with UPST 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 with UPST and awaiting approval.
Other review	The Form Request is with UPST and awaiting approval.
Glacier/Treasury Review	The Form Request is with the Treasury's Office . The request requires additional action for the Glacier invite registration. The Glacier registration is to be completed and the documentation to be submitted to proceed with final approval and foreign supplier setup.
Pending Documentation	The Form Request is with the supplier . The necessary documentation has been sent out to the supplier and UMass is waiting for the completed documentation submission from the supplier.