PEOPLESOFT (PS) SUPPLIER INTAKE PROCESS

When a requester/initiator decides to engage a 'new supplier' to purchase future products or services the requester/initiator will;

Verify whether this anticipated supplier currently is entered in the PeopleSoft system and if so, use that Supplier ID number when creating the requisition.

If the intended supplier to be used does not exist in PeopleSoft, then a new Supplier ID number will need to be established. Completing the Supplier Intake form and IRS form W9 is required as the initial step by the requester/initiator (*It is recommended that these two blank forms be forwarded by the requester/initiator to the supplier to complete (supplier has all the necessary information, first hand).

Use the following link to access forms: https://www.sdccd.edu/about/departments-and-offices/business-technology-services-division/business-support-services/purchasing-vendors/forms.aspx\

Upon completion, the supplier shall return the two forms to the requester/initiator.
The requester/initiator will review the forms for completeness and accuracy.
If incomplete the requester/initiator will return the form(s) to the supplier.
If complete, the requester/initiator will perform the data entry into PS from the completed forms.
The data as entered will remain in an 'unapproved' status within PS until purchasing is notified and reviews and approves the content.
Thereafter, a Supplier ID is issued within PS. Enter that 10 digit Supplier ID number in the box (top right) of the Supplier Intake form.

The requestor/initiator then emails the W9 and the Supplier Intake forms to the public folder ("Vender Intake") at supplierintake@sdccd.edu requesting approval by Purchasing. **Enter ONLY the supplier name and ID number in the subject line of the email.**
Purchasing will review and notify the requestor/initiator via email when the supplier is approved.
Thereafter, the requester/initiator may obtain a quote and draft the requisition within PS, including the now approved supplier. (ID)

The Federal IRS W9 form must be the 'Rev. November 2017' form in order to be current.
The supplier must accurately complete and return the form to the requester/initiator.

Purchasing is responsible for reviewing the data entry performed by the requester/initiator and either approving in PS or sending the data back to the requester/initiator for revision.

The submitted W9 form is also (only) reviewed by Purchasing for completeness.

A cursory view is then performed by Purchasing as to the W9 content. The purpose of this task is to identify a possibility of the named supplier, individual or named partnership as potentially qualifying for Federal 1099 tax status.

No decision or recommendation is made by Purchasing as to the actual tax status of the named supplier.

The supplier intake form is placed in a public folder for filing and access by both Accounts Payable (AP) and Purchasing. A subfolder places the cursory Purchasing review for 1099 supplier status for analysis and determination by A/P staff.

Generally Purchasing will notify A/P of document(s) being placed within the sub folder, or A/P may intermittently view the folder/subfolder.