Submitting a Supplier Edit Request Form

Supplier edit request forms should be submitted in the following situations:

- A supplier needs their invitation to onboard resent
- An inactive supplier needs activated
- An Out-of-Network supplier in BUY.IU needs invited to register
- A supplier needs to update their address, email, or account contact

Ideally, suppliers maintain and update their own information via the supplier portal. If this is not possible, use the Supplier Edit Request form to request changes on their behalf. These edits require substantiation documentation.

Substantiation documentation must come directly from the supplier. Examples include invoices, mailed requests on letterhead, and email communication.

Before following the steps outlined in this guide, collect the following from the supplier and/or the supplier record:

- Supplier name
- BUY.IU supplier number or Jaggaer ID number
- PO Distribution Method
- Reason for edit or submission of the form
- Substantiation documentation

Review the [How to Read a Supplier Record document](#) for help locating this information on the supplier record.

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Submit the Request

Access the request form in BUY.IU by navigating to the Requests section of the Supplier module. Click Request New Supplier and a dialog box opens.

Select Supplier Edit Request Form from the drop-down menu and enter the supplier’s name in the Supplier name field. Click Submit to access the form.
Review the Instructions and click **Next**.

Enter the supplier number in the **Supplier Number** field. BUY.IU supplier numbers begin with a lowercase “p”. If requesting an Out-of-Network supplier be invited, enter their Jaggaer ID number here. In instances where a supplier number is not available, such as resending an invitation, enter “NA” in this field.
Next, enter the email address or fax number in the **PO Distribution Method** field. This is the email or fax number orders should be sent to when using the address.

If the supplier is receiving payment via check request, enter “Manual/No Print” in this field.

In the next **text box** describe the edits needed to the supplier record.
Next, upload supporting documentation to substantiate the change you have requested. Supporting documentation must be uploaded when the following changes are requested:

- Permanent address
- Payment address
- Business name
- Adding a new business contact

Supplier Data Management (SDM), the group who reviews these forms, may request supporting documentation in additional situations. If this is the case your request will be returned with a note stating that additional information is needed.

Click Upload and a dialog box opens.

Enter a name for the supporting document in the Title field, then click Choose File to upload the attachment. Click Save Changes to attach the documentation to your request form.

NEVER upload documents containing critical data to BUY.IU. This may include but is not limited to:

- Tax forms, such as a W-9 or W-8
- Passport or visa information
- FERPA information
- HIPAA information
- Drivers licenses

BUY.IU cannot securely store critical data. If your substantiation documentation contains critical data, properly redact the information prior to upload using the guidelines outlined in the Knowledge Base.
Any additional information can be shared with SDM in the **Comments To Share With SDM** field. Examples of additional comments could include a statement explaining that the supplier will not login to their portal to make the changes themselves.

Click **Save Progress** to save your work or **Next** to proceed to the form submission screen.

Check the box next to the statement of attestation and click **Complete Request** to submit your edits.
BUY.IU prompts you to confirm your choice. Click Yes to submit the form.

The request form routes to SDM for review and approval.

Return Notification
Supplier Data Management (SDM) will return your request if additional information is needed to complete the changes requested. You will receive an email notification that the form was returned to you.

Click the link in the email message to access the request form, make the changes requested, and resubmit the form.

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RE: New Form Request Returned for Frodo Baggins

Dear Sarah Chavaz,

Your request was returned by Chavaz, Sarah

The reason for the return was: This change requires substantiation documentation. Please resubmit the form with appropriate documentation attached.

To modify this request, click the link below:

Click here to view the request in your organization’s site

If you have any questions with regards to this request, please contact the assignee who returned the request or your SelectSite Support Team.

Thank You,

IndianaUTUIT

Support Team Contact Information:

+1 812-855-3720
Form Processing and Rejection Notification

A rejection notification does not mean action was not taken on your request. Be sure to review the History of the request form to learn what action was taken by the SDM.

You will receive a rejection notice when action has been taken on your request. Click the link for more information to access the rejected form.

RE: Form Request Workflow for Frodo Baggins has been Rejected

Dear Sarah Chavez,

Your request for Frodo Baggins has been rejected.

Click here to view the request in your organization’s site

Thank You,

IndianaUTUIT

Support Team Contact Information:

+1 812.855-3720

purhelp@iu.edu

On the request form, click History, located in the upper right-hand corner, to see what changes were made by Supplier Data Management (SDM).
In this example, SDM made the changes we requested but we received a rejection notification.

Check Request Form Status
Check the status of your request at any time by navigating to My Supplier Requests, available in the Requests section of the Supplier module.
Search for requests with a status of **Under Review** to see those pending action from SDM. Search for requests with a status of **Rejected** or **Returned** to see those that have been acted upon.

### My Supplier Requests

<table>
<thead>
<tr>
<th>Requested Supplier</th>
<th>Template</th>
<th>Request Status</th>
<th>Workflow Step</th>
<th>Workflow Assignee</th>
<th>Status Last Updated</th>
<th>Created</th>
<th>Supplier Profile</th>
<th>Registration Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Frodo Baggins</td>
<td>Supplier Edit Request Form</td>
<td>Rejected</td>
<td>-</td>
<td>-</td>
<td>10/1/2019 1:48 PM</td>
<td>10/1/2019 1:11 PM</td>
<td>-</td>
<td>Actions</td>
</tr>
<tr>
<td>Traveler Name</td>
<td>Research Participant Supplier</td>
<td>Under Review</td>
<td>Supplier Request</td>
<td>-</td>
<td>9/23/2019 8:22 PM</td>
<td>9/23/2019 8:02 PM</td>
<td>-</td>
<td>Actions</td>
</tr>
</tbody>
</table>