

OFFICE OF THE CONTROLLER

Supplier Department

Supplier Onboarding Refresher
Training for the Liaison

May 2025



UNIVERSITY OF
South Carolina



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What is Supplier Onboarding



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What is Supplier Onboarding

- An online supplier registration system that gives potential suppliers access to self-service registration and change requests through a supplier self service portal in PeopleSoft Finance.
- **The self-service portal allows:**
 - ✓ Potential suppliers to register
 - ✓ Current suppliers to request a User ID
 - ✓ Registered suppliers to complete a change request
- Provides specific forms for domestic (business/individual) and international (business/individual) suppliers.
- The system includes email notifications and approvals at the department and Supplier Team levels.
- Go live date was **July 2020**.



Supplier Liaison Responsibilities



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Supplier Liaisons

Supplier Liaisons are responsible for:

- Determining if a supplier is already in our system
- Sending the link to the Supplier Portal in an email invitation to potential and current suppliers
- Approval of Supplier Registration at department level
- Being familiar with the Registration and Change Request forms
- First level of contact for all initial supplier set up and their questions



Searching for a Supplier in PeopleSoft

Navigation: **Main Menu > Suppliers > Supplier Information > Add/Update > Review Suppliers**

Step 1: Navigate to the Review Suppliers Page in Peoplesoft and search to determine if your supplier is in the system.

HELPFUL TIP – The most efficient way to search is by ID Type if you have the SSN or FEIN. If you do not have this, search by Name and Change Name “Equals” to “Contains” and search by a portion of the name.

The screenshot shows the 'Review Suppliers' page in PeopleSoft. The search criteria are as follows:

- *SetID: USC01
- Name: Contains (dropdown), value: foods
- Supplier ID: (empty)
- Short Name: Equal to (dropdown), value: (empty)
- Withholding Name: Equal to (dropdown), value: (empty)
- Supplier Status: (dropdown), value: (empty)
- Classification: (dropdown), value: (empty)
- Sanctions Status: (dropdown), value: (empty)
- Type: (dropdown), value: (empty)
- Persistence: (dropdown), value: (empty)
- Address: Equal to (dropdown), value: (empty)
- City: (empty)
- Customer Number: (empty)
- Country: (empty)
- ID Type: U.S. Tax Identification Number (dropdown), value: (empty)
- State: (empty)
- VAT Registration ID: (empty)
- Postal: (empty)
- Withholding Tax ID: (empty)
- Bank Account #: (empty)

Max Rows: 300. Search and Clear buttons are visible.

Search Results: 1-10 of 31 results. View All link is present.

Actions	SetID	Supplier ID	Supplier Name	Supplier Status	Address	City	State	Postal Code	Country	Address Status
▼ Actions	USC01	0000000969	PERFORMANCE FOODSERVICE IFH	Approved	PO Box 933580	Atlanta	GA	31193-3580	USA	Active
▼ Actions	USC01	0000000969	PERFORMANCE FOODSERVICE IFH	Approved	2801 Alex Lee Boulevard	Florence	SC	29508-3260	USA	Active
▼ Actions	USC01	0000000969	PERFORMANCE FOODSERVICE IFH	Approved	PO Box 741580	Atlanta	GA	30374-1580	USA	Active
▼ Actions	USC01	0000001288	FEASTERS FOODS	Inactive	111 Marlboro Street NE	Aiken	SC	29801-4570	USA	Active
▼ Actions	USC01	0000001288	FEASTERS FOODS	Inactive	111 Marlboro Street NE	Aiken	SC	29801-4570	USA	Active
▼ Actions	USC01	0000001288	FEASTERS FOODS	Inactive	PO Box 842	Aiken	SC	29802-0842	USA	Active
▼ Actions	USC01	0000003473	US FOODS INC	Approved	9399 West Higgins Road Ste 500	Rosemont	IL	60018-4992	USA	Active

Step 2: If necessary, click View All to see all results.



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2 Invitation Letters: Which one should I use?

If supplier **is** found:

- Supplier Status is **Approved**: Send the Supplier ID and the User Account Request Letter **ONLY** to the supplier if they need to make an update to their profile. If they do not need to make an update to their profile, proceed to enter the payment request or purchase requisition.
- Supplier Status is **Inactive**: Request that the supplier send an updated W9 (for U.S. suppliers), W-8BEN-E (for foreign businesses/entity suppliers), or W-8BEN or 8233 (for foreign individuals) to APSUPPLR@mailbox.sc.edu.

If supplier **is not** found:

- Send the New Supplier Registration Letter **ONLY** and your PeopleSoft email address to the supplier so that the submitted registration can be routed to you for approval. Use the [How to Add Your Email Address to PeopleSoft Quick Reference](#) to ensure your email address is set up in PeopleSoft so that registrations can be routed to you for approval.

Helpful Tip – The link to the portals is in the User Account Request Letter as well as the New Supplier Registration Letter. If the link does not launch in the supplier's default browser, please instruct them to use one of these browsers: **Internet Explorer**, **Safari**, or **Firefox**. If the link still does not launch, please instruct them to close all browsers, clear cache, and relaunch the portal using the link in the letters. For instructions on how to clear cache for any browser, visit the [Refresh Your Cache](#) website.



My System Profile: Business Email Check

Navigation: **Main Menu > My System Profile**

The screenshot shows the 'My System Profile' page for the University of South Carolina. It includes sections for 'Alternate User', 'Workflow Attributes', 'Email', and 'IM Information'. Three red callouts are present: '1' points to the 'Workflow Attributes' section where 'Email User' and 'Worklist User' are checked; '2' points to the 'Business' email account entry in the 'Email' table; '3' points to the 'Save' button at the bottom left.

Alternate User

If you will be temporarily unavailable, you can select an alternate user to receive your routings.

Alternate User ID

From Date (example:12/31/2000)

To Date (example:12/31/2000)

Workflow Attributes

Email User Worklist User

Email

Primary Email Account	Email Type	Email Address		
<input checked="" type="checkbox"/>	Business	JOANNEC@mailbox.sc.edu	+	-

IM Information

Protocol	XMPP Domain	UserID	Password		
XMPP	<input type="text"/>	<input type="text"/>	<input type="text"/>	+	-

Save

- 1. Workflow Attributes:** check both Email User and Worklist User, giving you the option to approve Supplier registrations both ways.
- 2. Business Email:** Be sure to have your business email populated here as the primary email account. All supplier related emails will go to this specific email.
- 3. Save Changes:** Click the Save button to save all changes made on this page.



Dear Valued Supplier,

The University of South Carolina is inviting you to register to become a supplier!

You are receiving this email because you have been identified as a potential supplier by me, your UofSC Supplier Liaison.

We have implemented an online Supplier Portal in PeopleSoft providing potential suppliers access to a secure self-service system where you can:

- Register online to become a supplier with UofSC
- Manage supplier information, such as addresses, contacts, and payment information

To **register** with UofSC to become a new supplier, please click [here](#).

WEB BROWSER TIP: Please try using one of the following browsers: Internet Explorer, Safari, or Firefox. **Note:** Chrome & Edge, as well as smart phones and tablets, are not compatible with the portal. If the link does not launch, please close all browsers, clear cache, and relaunch the portal from the link above in this letter. For instructions on how to clear cache for any browser, please click [here](#).

HOW TO GET STARTED: Once you have launched the link, on the **Supplier Home Page**, click the **Create an Account (New Users) Tile** and select a **New Supplier** form based on whether the supplier is **Domestic (U.S.)** or **International (Non U.S.)**. For step-by-step instructions on how to complete the registration, please see **HELPFUL TIP** on the **welcome step of the registration**. After the Registration has been approved, you will receive two separate emails. One email will contain your user ID and the second email will contain your supplier ID. You will use the user ID along with your password created during the registration process to sign in and maintain your supplier information going forward.

NOTE REGARDING ACH FOR US SUPPLIERS: We cannot pay ACH to online only banks/platforms. If a registration is submitted with this type of account, it will not be added to your supplier profile and a check will be mailed.

VERY IMPORTANT: You will create your password during the registration process. You will need to make note as it will not be emailed to you for security reasons. The USER ID will be emailed to you and will be required when signing in to update supplier information.

ACCESSING YOUR ACCOUNT: Upon approval of your registration, you will receive an email notifying you of such. In some cases, an additional approval is needed, and you may not be able to access your account until this is complete. This usually takes no more than 2 business days AFTER the registration is approved.

Thank you!

New Supplier Registration Letter



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Supplier Onboarding Self-Service Portal



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Supplier Onboarding Self-Service Portal

Potential Suppliers that are not currently in the system will use the applicable invitation letter sent to them by the Supplier Liaison to enter the self-service portal where they will **Create an Account** and complete a **New Supplier** form.

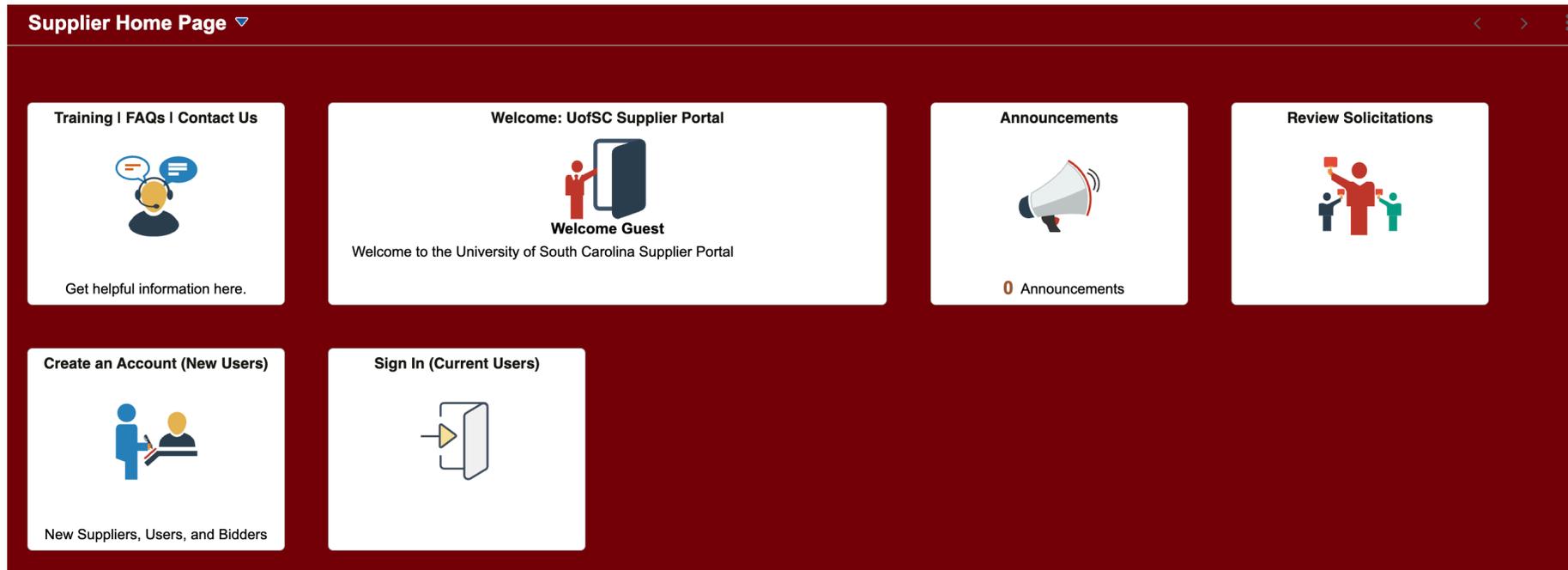
Current Suppliers that are in the system but do not have sign in credentials will use the applicable invitation letter sent to them by the Supplier Liaison to enter the self-service portal where they will **Create an Account** and complete a **Get User ID** form.



Supplier Onboarding Self-Service Portal

Once a **Potential Supplier** or **Current Supplier** has sign in credentials, they will **Sign In** and complete a change request from the **Manage Supplier Information** tile.

Use the **Supplier Homepage** to access various pages on the portal, by clicking a tile.



Supplier Registration Form

Navigation: [Supplier Home Page](#) > [Create an Account \(New Users\)](#) > [New U.S./International Supplier Request](#)

Use the **Supplier Registration Request** form to enter the details to register as a Supplier. You will need your Tax Identification Number (US or Foreign) and electronic copies of a W-9, W-8BEN-E, W-8BEN, or 8233 in order to register. Select a form based on whether the supplier is **Domestic** or **International**.



New U.S. Supplier



Have you been invited by a UofSC contact to complete a new supplier registration? Use this registration if you are a domestic (U.S.) corporation or individual and your company is not already registered as a Bidder/Offeror.

[More...](#)

Register now

New International Supplier



Have you been invited by a UofSC contact to complete a new supplier registration? Use this registration if you are a non-US corporation or individual.

[More...](#)

Register now



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Applicable Tax Forms by Supplier Type

- **U.S. Citizen: W-9**
- **International individual providing service OUTSIDE the U.S.: W-8BEN**
- **International Individual Providing Service INSIDE the U.S.: Form 8233**
- **International Business Entity: W-8BEN-E**



Approval Workflow

- All new **Supplier Registrations** will be approved first at the **Department level** and then a final approval made at the Supplier Team level.
- Departments are responsible for **denying** the registration if they are not familiar with the supplier or do not intend to do business with the supplier.
- Departments will not request more information, **only** the Supplier Team will Request More Information.
- All new **User ID Requests** will be approved by the **Supplier Team only**. These are current USC suppliers that need access to their profile on the self-service portal to make changes to the information already in the system.



Supplier Approval: Department

Navigation: **Main Menu > Worklist** or **Click the link in the email**

- Cannot access if logged into HCM.
- Can do registration status check here as well.

Use the **Manage Request Approval** page to manage approvals for registration of new suppliers.

The screenshot shows a web browser window displaying the 'Manage Request Approval' page. The page header includes the University of South Carolina logo and 'FTST'. The main content area is titled 'Manage Request Approval' and contains a 'Registration Details' section with the following information:

Registration ID:	REG0000061	Entered on:	07/02/2020
Company Name:	Big Solutions LLC	Approval Status:	Pending Approval
Email ID:	Baileydk@mailbox.sc.edu	SetID:	USC01
Country:	USA United States	OFAC Checking:	OFAC checked
Address:	1400 Nix Road	Duplicates Supplier:	Not Found
City:	Columbia	Postal:	29208
State:	SC		

Below the registration details, there is a section for 'Identification & Classification' with the U.S. Tax Identification Number 600000000. At the bottom of the page, there are three buttons: 'Approve', 'Deny', and 'Request More Information'.



You are receiving this email because you requested to make updates or changes to supplier information currently in our system, such as addresses, contacts, and/or payment information. To make these changes, you will need to request a **User ID**.

To request a **User ID**, please click [here](#).

WEB BROWSER TIP: Please try using one of the following browsers: Internet Explorer, Safari, or Firefox. **Note:** Chrome & Edge, as well as smart phones and tablets, are not compatible with the portal. If the link does not launch, please close all browsers, clear cache, and relaunch the portal from the link above in this letter. For instructions on how to clear cache for any browser, please click [here](#).

HOW TO GET STARTED: Once you have launched the link, on the **Supplier Home Page**, click the **Create an Account (New Users) Tile** and select **Get User ID** based on whether the supplier is **Domestic (U.S.)** or **International (Non U.S.)**. To request a **User ID**, you will need your **Supplier ID** and **Tax Identification Number or Social Security Number**. Once you have successfully submitted your user ID request, you will receive an email providing your user ID. You will use this with your password created during the user ID request process to sign-in and maintain your supplier information going forward. Once you have your login credentials, click on the **Sign In Tile** from the **Supplier Home Page**. After signing in, click on the **Manage Profile Tile** and select the **Change Request Form** based on whether the supplier is **Domestic (U.S.)** or **International (Non U.S.)**. For step-by-step instructions on how to complete the change request, please see **HELPFUL TIP** on the welcome step of the change request.

NOTE REGARDING ACH ADDITIONS & UPDATES FOR US SUPPLIERS: We cannot pay ACH to online only banks/platforms. If a change request is submitted with this type of account, it will not be added to your supplier profile and a check will be mailed.

VERY IMPORTANT: You will create your password during the registration process. You will need to make note as it will not be emailed to you for security reasons. The **User ID** will be emailed to you and will be required when signing in to update supplier information.

Thank you for your partnership and please contact your Supplier Liaison, if you have additional questions.

New User ID Request Invitation Letter



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Supplier User ID Request

Navigation: Supplier Home Page > Create an Account (New Users) > Get User ID – Active Supplier / Current Int.

Use the **Get User ID** form to request a user ID and/or request additional user IDs for individuals in your organization. You will need your Supplier ID and Tax Identification Number in order to request a User ID. Select a form based on whether the supplier is **Domestic** or **International**.

[Supplier Home Page](#) **User Registration**  

Get User ID - Active Supplier

 Are you already an active UofSC Supplier? You can obtain a User ID here as a domestic (U.S.) supplier.

[More...](#)

[Register now](#)

Get User ID - Current Intl. A

 Are you already an international UofSC Supplier with a foreign tax ID number? Use this registration to get a User ID.

[More...](#)

[Register now](#)

Get User ID - Current Intl. B

 Are you already an international UofSC Supplier with a U.S. Tax ID? Use this registration to get a User ID.

[More...](#)

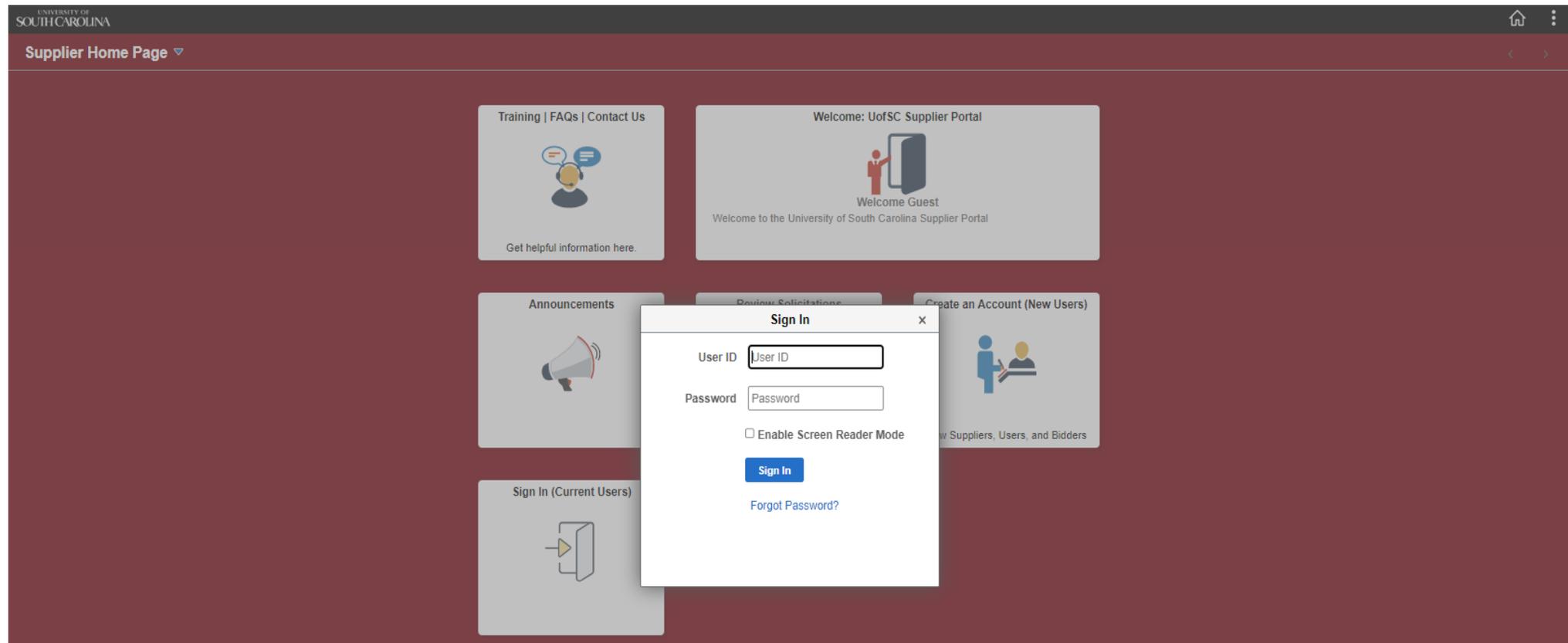
[Register now](#)



Supplier Change Request

To create a **Supplier Change Request**, all registered Suppliers will be required to **Sign In**.

Reminder: To receive a User ID and Password, a potential supplier will need to register as a **New Supplier** while a current supplier will need to **Get User ID**.



Supplier Change Request

Navigation: [Supplier Home Page](#) > [Manage Supplier Information](#) > [Domestic/International Change Request](#)

Use the **Supplier Change Request** form to start a new supplier change request or select an existing request to continue the request process. Select a form based on whether the supplier is **Domestic** or **International**.

The screenshot shows a web application interface for managing supplier change requests. The page title is "Manage Profile". On the left, there is a navigation menu with two options: "Domestic Change Request" (selected) and "International Change Request". The main content area is titled "Supplier Change Request Selection". It features a "Select Supplier" section with a dropdown menu currently showing "GRAND VALLEY STATE UNIVERSITY". Below this is a green "Create New Request" button. Further down, there is a section for "Pending Change Requests" which contains a table with the following data:

Supplier ID	Name	Request ID	Change Status	Date
0000040290	GRAND VALLEY STATE UNIVERSITY	CHG0000001	Pending Approval	07/10/2020

At the top right of the page, there are utility links: "New Window", "Help", "Personalize Page", and a window management icon. A "Supplier Home Page" button is visible in the top left corner of the application area.

Non-Resident Suppliers

If a supplier does not reside in South Carolina and is not registered with the SC Secretary of State or SC Department of Revenue, additional income tax must be withheld as outlined below:

- For Services: 2% of each payment under a contract exceeding \$10,000
- For Rents or Royalties: 7% of each payment exceeding \$1,200 (and 5% for corporations)

To avoid the additional tax, non-resident suppliers are required to complete [SC DOR Form I-312](#) to certify that they are registered with one of the state agencies noted above.



Cash Custodians



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Cash Custodians



Controller's Office
Cash Custodian Supplier Form

This form is to be used only for student travel advance, cash advance, petty cash or change fund custodian supplier setup.
Changes in petty cash & change fund custodians require approval from the Controller's Office

Legal Name: _____

USC Mailing Address Line 1: _____

USC Mailing Address Line 2: _____

City, State & Postal Code: _____

USC ID (Do not use SSN): _____

Email Address: _____

Telephone: _____

Employee/Student Signature: _____

Student Travel Advance
 Cash Advance
 Petty Cash
 Change Fund

For changes in Petty Cash & Change Fund Custodians only
 Petty Cash or Change Fund Balance on General Ledger: _____ (Must attach current reconciliation)

Chartfields

Operating Unit	Department	Fund	Account	Class	PC Business Unit	Project	Activity

Department: _____

Department Contact (Name, Email, Phone): _____

Departmental Approval: _____ Date: _____

Please email this Supplier Form to APSupplr@mailbox.sc.edu

Controller's Office Use Only:

Petty Cash/Change Fund Approval: _____ Date: _____

A **Cash Custodian Supplier** is any employee that needs a cash advance or is a custodian for a petty cash and/or change fund. This form is also to be used for students needing a travel advance. The current process is still in effect. Complete the form and email to apsupplr@mailbox.sc.edu. Be sure to include support documentation.

- Employee or Student Information – Ensure this is a USC on campus mailing address.
- Select the type of custodian.
- Complete only for petty cash and change fund custodians.
- Department Information – Department Contact, Department Approval and date.

Student Reimbursement Process



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Student Reimbursement Process

Student Non-employees

- Student non-employees will no longer be setup up as a supplier in PeopleSoft. Instead, departments will use a new **Student Reimbursement** form for any reimbursements to student non-employees and send these forms to Accounts Payable using the AP Upload mailbox, apupload@mailbox.sc.edu. Accounts Payable will then enter these reimbursements into PeopleSoft as a single pay supplier.
- For **reportable** expenses such as **stipends and fellowships**, students will be required to use the new Supplier Onboarding self-service portal to register as a supplier to receive a supplier ID. The department will then use Payment Request for payment.

Student Employees

- For all non-travel expenses, use the **Travel and Expense** module to reimburse student employees for expenses related to the work they do at the University.



Resources & Contacts



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Office of the Controller

Office of the Controller

General Accounting

Grants and Funds
Management

Compliance and Tax
Management

Compliance Management

➤ **Supplier Management**

Tax Management

Compliance and Tax Management
Staff Directory

Payroll Department

Operational Management
and Reporting

External Financial Reporting
and Transparency

Resource and Training
Toolbox

Contact Us

Supplier Management

Supplier Management is a unit of the Controller's Office that manages supplier setup in accordance with university policies and procedures.

Supplier Management Services

Our team facilitates supplier setup and management of all university suppliers.

Supplier Onboarding

Expand all



Supplier Types



Supplier Forms and Instructions



Supplier Liaison FAQs



Independent Contractor vs. Employee Classification



Contact Supplier Management

To inquire via email:
apsupplr@mailbox.sc.edu

To inquire via mail:
1600 Hampton Street
6th Floor, Controller's Office
Columbia, SC 29208

Where to Find the Resources

For supplier resources, visit our [Supplier Management](#) page.



Office of the Controller

Office of the Controller

General Accounting

Grants and Funds Management

Compliance and Tax Management

Payroll Department

Operational Management and Reporting

External Financial Reporting and Transparency

Resource and Training Toolbox

Business Manager

Grant Administration

Principal Investigator

Policies & Procedures

Forms

Newsletters

PeopleSoft Finance Training Schedule

Listserves

Social Media

Contact Us

Business Manager

The role of each Business Manager at the University of South Carolina varies across each college and department. Each Business Manager handles several responsibilities that directly influence the success of their departments and the University overall. They provide business expertise on a variety of topics including, but not limited to budget, expenses, supplier onboarding, transaction corrections, and University policies and procedures.

Below is a list of tasks a Business Manager may be responsible for within their college/department. Sections include links to training resources that support each task.

Note: Each year the Controller's Office provides refresher trainings starting the month of February thru the end of April. Registration links for all scheduled trainings are sent to our BIZMANAGER listserv end of January, provided in our monthly newsletter, and in a prior week reminder email. On demand training can be found in the sections below.

Account Funding Change

Expand all



AP Uploads



Business Expense Prepaid Cards



Cash Advances



Cost Transfer



Departmental Deposits



Employee Reimbursement (Non-travel)



Endowments



Finance Intranet



Where to Find the Resources

For additional training resources, visit our [Business Manager](#) page.



Controller's Office Contact List

General Accounting (JEs, JVs, Apex, GL issues/Questions)	Email Address
General Email Address	genacctg@mailbox.sc.edu
Cash Advance Settlement	cashadvc@mailbox.sc.edu
Payroll Retro Journal Entries	retroje@mailbox.sc.edu
Chartfield Maintenance	cfmaint@mailbox.sc.edu
Moving & Relocation Mailbox	moving@mailbox.sc.edu
PeopleSoft Finance Security Requests	pssecure@mailbox.sc.edu
Accounts Payable	Email Address
General Email Address	ap@mailbox.sc.edu
AP Uploads	apupload@mailbox.sc.edu
Supplier Maintenance	apsupplr@mailbox.sc.edu
Travel Office	Email Address
General Email Address	teoffice@mailbox.sc.edu
Student/Non-employee Travel Authorizations and Travel Reimbursement Vouchers	tesubmit@mailbox.sc.edu

Controller's Office Contact List

Capital Assets	Email Address
Physical Inventory	physinv@mailbox.sc.edu
Cash Management and Treasury	Email Address
General Treasury Email Address	treasury@mailbox.sc.edu
Business Expense Card	cards@mailbox.sc.edu
Team Card	teamcard@mailbox.sc.edu
Travel Card	trvcard@mailbox.sc.edu
Compliance and Tax	Email Address
General Compliance Email Address	concpl@mailbox.sc.edu
General Tax Email Address	tax@mailbox.sc.edu
Research/Development Sales/Use Tax Exemptions	rdequip@mailbox.sc.edu
Time and Effort Reporting	timeandeffort@sc.edu

Controller's Office Contact List

Grants and Funds Management	Email Address
Sponsored Award Specific Questions	Contact your Post Award Accountant (PAA)
Payroll	Email Address
General Email Account	payroll@mailbox.sc.edu

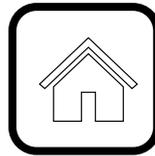


THANK YOU!

Office of the Controller



Alone, we can do so little; together,
we can do so much.



Address:

1600 Hampton Street
Columbia, SC 29208



Contact Number:

Phone: 803-777-2602
Fax: 803-777-9586



Email Address:

controller@sc.edu



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