University of Iowa –Supplier Change Request Instructions

Link to Online Application: eSupplier Connection Supplier Portal

Introduction:

Thank you for doing business with the University of Iowa. This script will help you submit a supplier change request (SCR) to maintain your supplier information. Please be sure to read all the ***Welcome*** instructions as well as the instructions included on each page (step) of the supplier change request process. Should you have any questions or comments, please email the Supplier Relations team at purchasing-vendor@uiowa.edu.

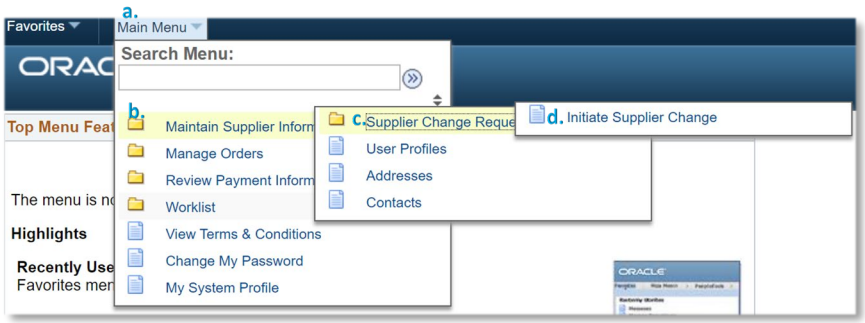
NOTE: We recommend that you use one of the following browsers: Google Chrome, Mozilla Firefox, Safari, and Microsoft Edge. **For security purposes while logged in, anytime you are not actively using the system for approximately 20 minutes you will timeout from the system. Any unsaved work will need to be entered again from the beginning.** To guard against this, we recommend that you save any changes once entered.

Step 1 – Login

a. Enter your ***User ID*** which begins with 'ES-'. ***User ID*** is case sensitive, be sure to use the same case from the email you received with your login credentials.

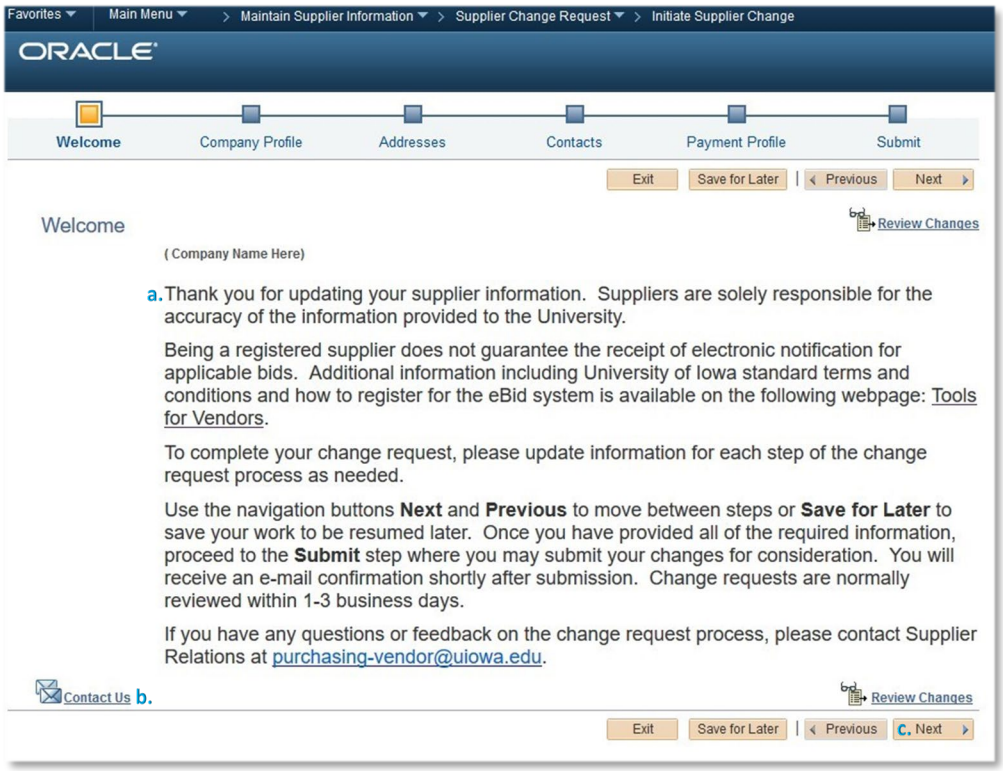
b. Enter your ***Password*** which is case sensitive, be sure to use the same case you originally entered for your password. If it is the first time you are logging in, you will be asked to change your password and to set your forgotten password reminder.
c. Select the ***Sign In*** button to continue to ***Step 2***.

Step 2 – Navigate



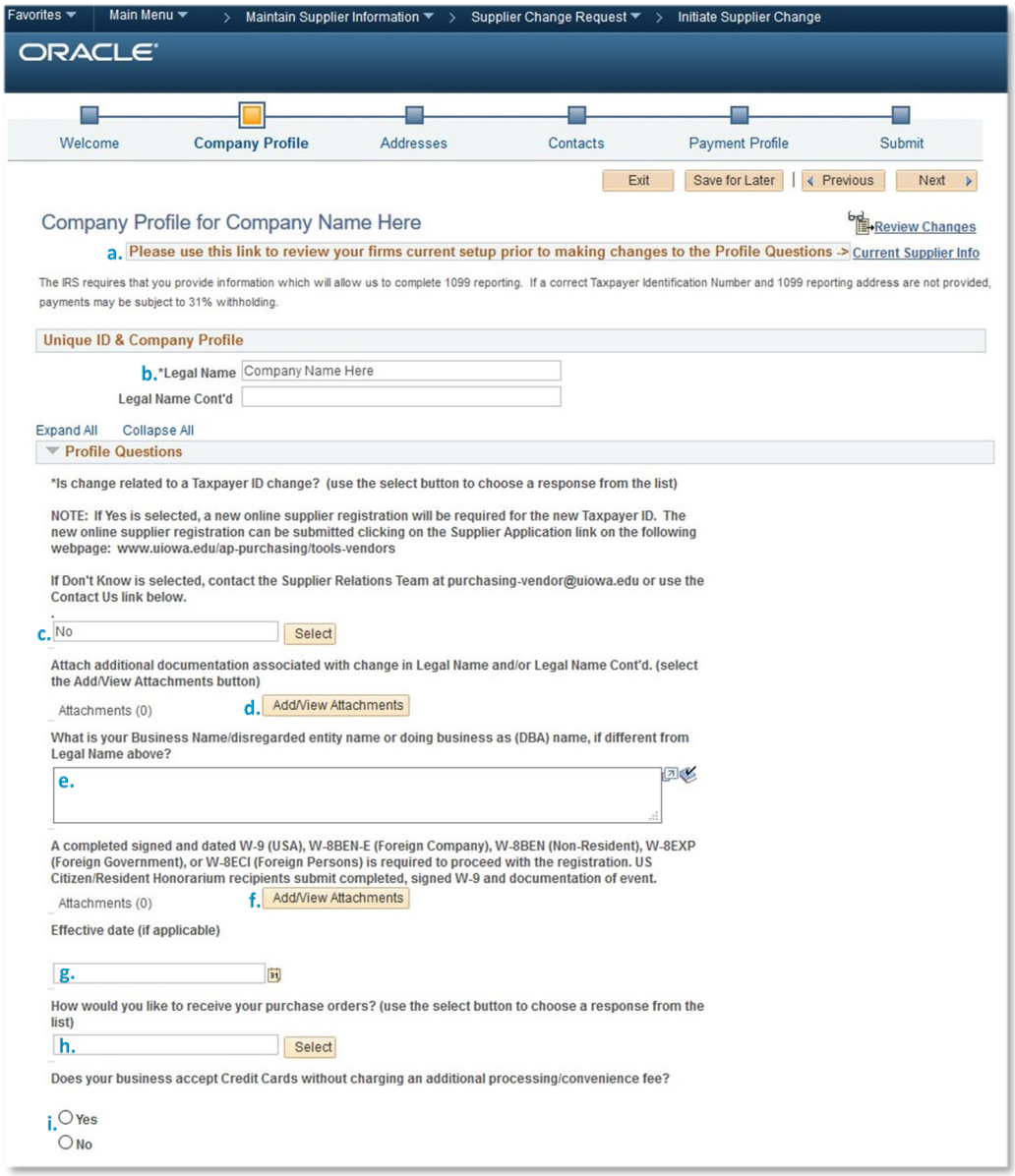
a. Select the ***Main Menu*** at the top of the webpage on the top left of eSupplier Connection.
b. Select the ***Maintain Supplier Information*** menu group.
c. Select the ***Supplier Change Request*** menu group.
d. Select the ***Initiate Supplier Change*** menu item and continue to ***Step 3***.

Step 3 – Welcome



a. Read the ***Welcome*** message.
b. If you have any questions, select the ***Contact Us*** link on the left side at the bottom of the page now or at any time while entering your supplier change request.
c. Select the ***Next*** button to continue to ***Step 4***.

Step 4 – Company Profile



a. Select the ***Current Supplier Info*** hyperlink to see the information currently recorded by the University for your firm. Only information that has changed needs to be entered into the ***Profile Questions*** section of the SCR.

   NOTE: If you are adding information to a question that allows for multiple selections. Be sure to include all appropriate selections, even if they were already included on the ***Current Supplier Info*** page. The information you enter will replace the previous information entered, additional selections are not added to existing selections.

b. Make any needed updates to the ***Legal Name*** of your firm or yourself (for an individual). Make sure the name matches what is indicated on your W-9. If the whole name does not fit, use ***Legal Name Cont'd*** for the remainder breaking at the last space between words in ***Legal Name***. As a note, all words are case sensitive.

c. Select ***Yes*** if the supplier change request being created is related to a taxpayer ID change. Select ***Don't Know*** if you are not sure. And, select ***No*** if the SCR is not related to a taxpayer ID change. NOTE: If you

answer ***Yes***, you must submit a new online supplier registration for the new TIN. If you answer that you ***Don't Know***, you will be asked to contact the Supplier Relations team at purchasing-vendor@uiowa.edu for more information on next steps.

d. If the ***Legal Name*** and ***Legal Name Cont'd*** have changes, please attach any available documentation associated with the name change.

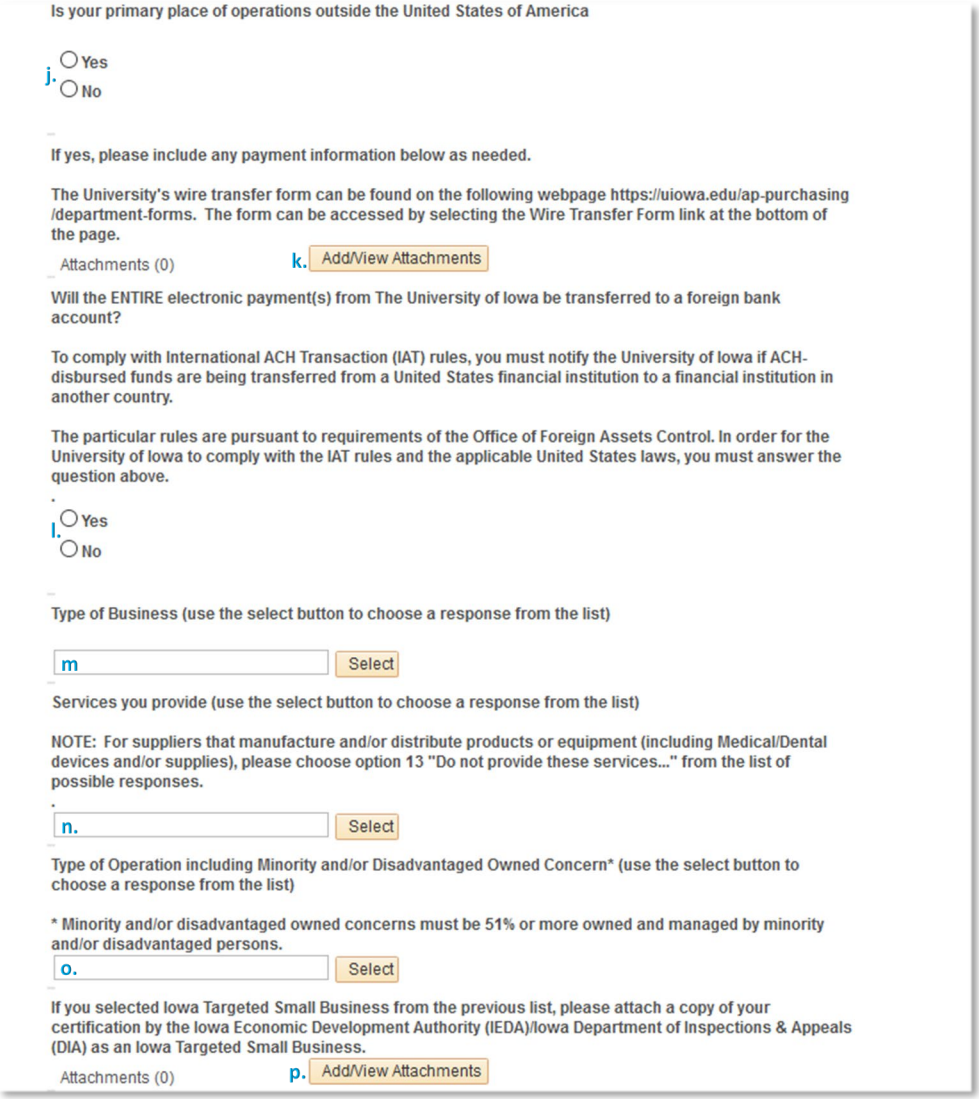
e. If your firm has a ***Business Name/Disregarded Entity Name or Doing Business As (DBA) Name*** that has changed or to be added (other than the ***Legal Name)*** please enter it here, otherwise leave blank.

f. Attach a completed ***W-9 (USA), W-8BEN-E (Foreign Company), W-8BEN (Non-Resident), W-8EXP (Foreign Government) or W-8ECI (Foreign Persons)*** for your firm by selecting the ***Add Attachment*** hyperlink, clicking ***Upload*** on the popup window, selecting the ***Browse*** button and highlighting the file name and clicking the ***Open*** button, then clicking the ***Upload*** button, entering an ***Attachment Description*** (optional), and finally selecting the ***Return*** button.

g. If there is a specific ***Effective Date*** for the information included on the registration request enter it, otherwise leave blank. Note, on the Addresses and Contacts tabs, you will also need to specify the effective date for any changes unless they are valid once the SCR is approved.

h. To update the default Purchase Order dispatch method, select from list of valid options of ***Email*** or ***Fax***.

i. To update if your firm accepts credit cards, select ***Yes*** or ***No***.



j. To update the selection indicating if your firm's principal place of operations is outside the USA, select either ***Yes*** or ***No*** as appropriate.

k. If your firm's principal place of business has changed to be outside the USA, please attach ***Payment Information*** such as the University's wire transfer form. The form can be found on the following webpage https://ap-purchasing.fo.uiowa.edu/department-forms by selecting the ***Wire Transfer Form*** link at the bottom of the page.

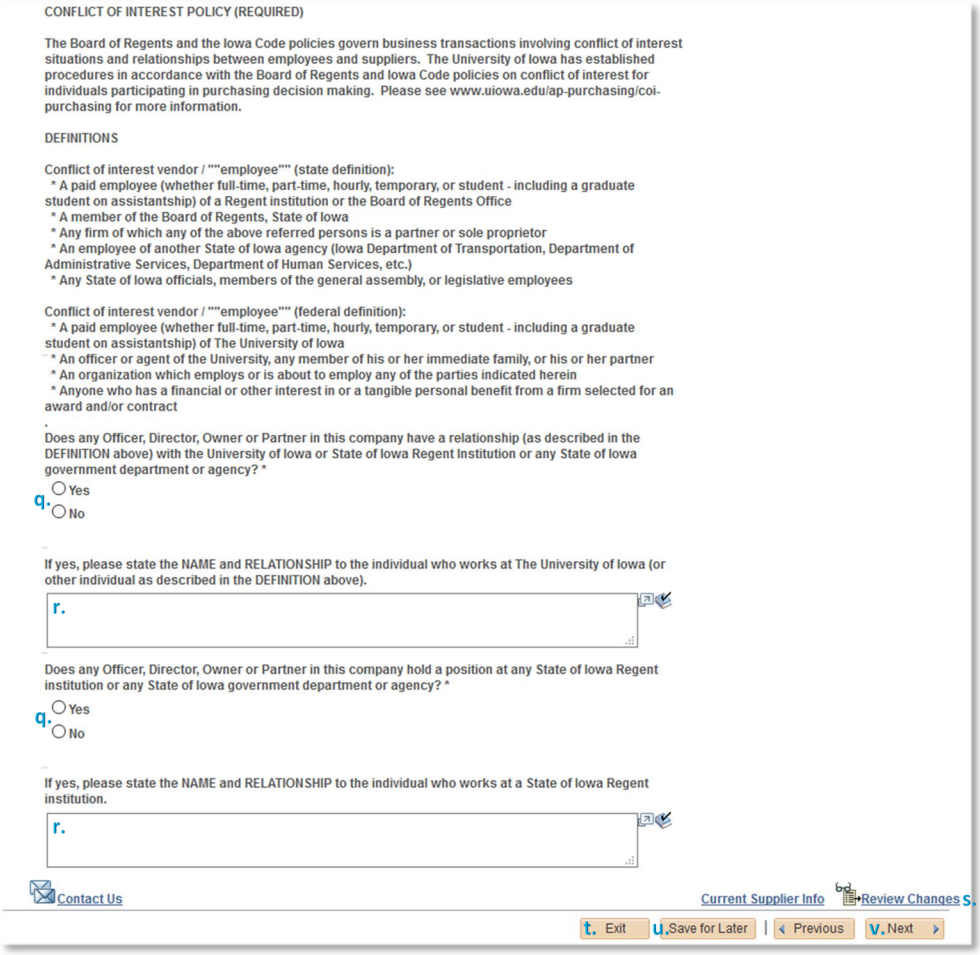
l. To update if your firm will transfer **entire payments** received from the University to a foreign bank account, select ***Yes*** or ***No*** as appropriate.

m. Update your firm's ***Type of Business*** by selecting from list of valid options. One or more options may be selected. If information is not available or the list of options is not applicable, it can be left blank. If any changes are made, please select all that apply even if they are already shown when selecting the hyperlink for Current Supplier Info (a.).

n. To update the ***Services you provide***, elect from list of valid options. One option must be selected.

o. To update the ***Type of Operation***, select from list of valid options. One or more options may be selected, otherwise leave blank. If any changes are made, please select all that apply even if they are already shown when selecting the hyperlink for Current Supplier Info in ***a.*** above.

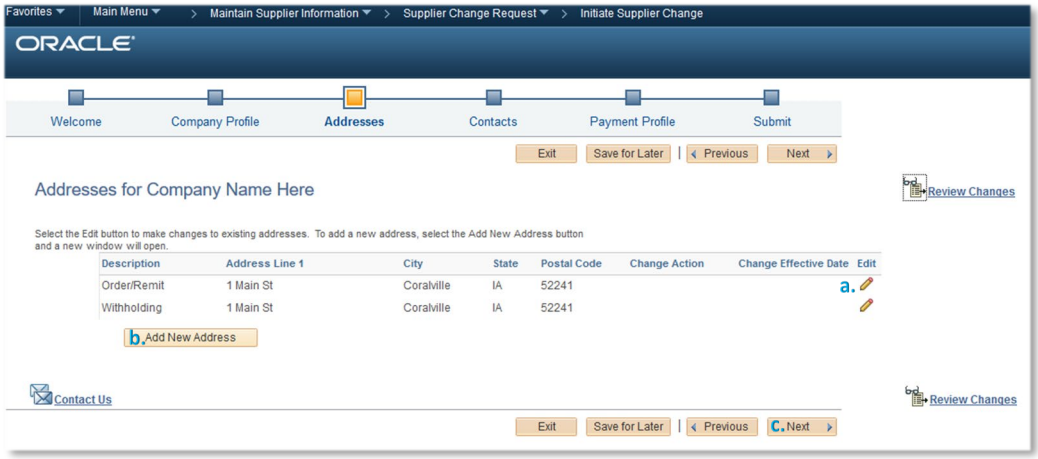
p. If your firm will now be identified as an Iowa Targeted Small Business, attach a copy of the certification by the IEDA/DIA by selecting the ***Add Attachment*** hyperlink, clicking ***Upload*** on the popup window, selecting the ***Browse*** button and highlighting the file name and clicking the ***Open*** button, then clicking the ***Upload*** button, entering an Attachment Description (optional), and finally selecting the ***Return*** button.



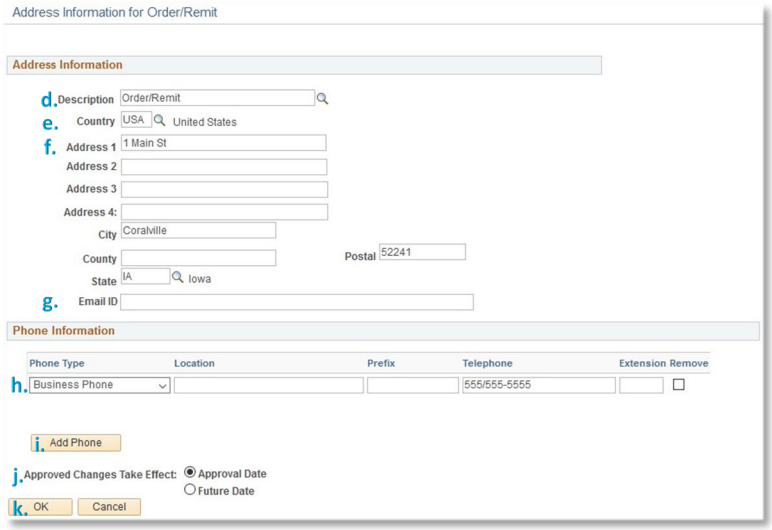
q. After reading the ***Conflict of Interest Policy*** in full, select ***Yes*** or ***No*** using the down arrow to identify if your firms Officer, Director, Owner or Partner holds a position with any State of Iowa Regent institution and/or a State of Iowa government department or agency is a conflict of interest supplier. If ***Yes*** is selected, enter the ***NAME and RELATIONSHIP of the individual(s)*** with the defined conflict.

r. Enter any additional ***Comments***, including more information if line 8 for ***Other*** was selection from the options under ***Type of Organization*** (l) and/or if line 13 for ***Do not provide these services*** was selected from the options under ***Services you provide*** in ***n.*** above.
s. Select the ***Review Changes*** hyperlink
t. Select the ***Exit*** button to cancel the SCR without any changes.
u. Select the ***Save*** for Later button to save the SCR to be completed later.
v. Select the ***Next*** button to continue to ***Step 5***.

Step 5 – Addresses



a. Select the ***Edit*** button to make changes to an existing address.
b. Select the ***Add New Address*** button to enter a new address.
c. Select the ***Next*** button to continue to ***Step 6***.



d. When the ***Edit*** button is selected in ***a.*** above, the ***Description*** can be updated by selecting the magnifying glass to see the list of valid selections which are used to identify if the address should be used for ordering only, remittances only, or both ordering and remittances.
e. For firms based in the United States of America, the ***Country*** code will default to USA and is not updatable. Foreign-based firms can change the ***Country*** code by clicking on the magnifying glass and selecting from the list of valid ***Country*** codes.
f. ***Address line 1***, ***City***, ***County***, ***State***, and ***Postal*** can all be changed and are all required. ***Address lines 2***, ***3***, and ***4*** can be updated and should be used if more space is needed than provided in ***Address line 1***.

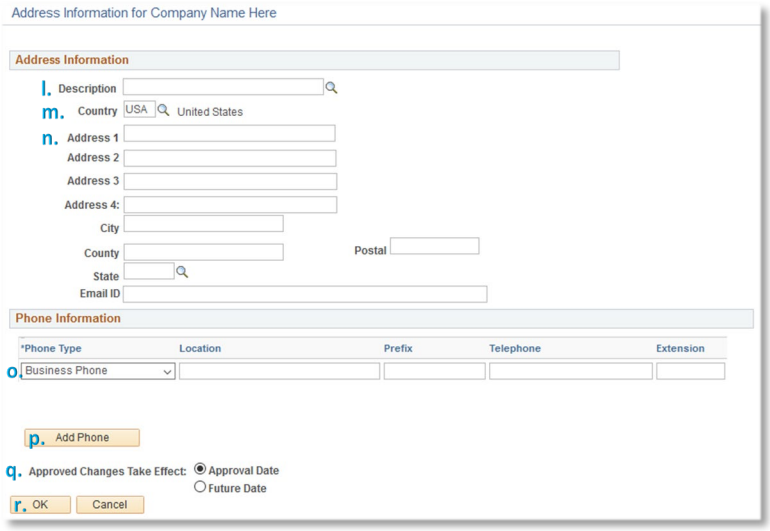
g. ***Email ID*** is required on the default ordering address if ***Email*** was selected to receive your purchase orders (***Step 4, h.***).

h. The ***Phone Type*** can be changed by selecting the field to see a list of valid values. The ***Telephone*** can also be updated if needed. A ***Phone Type*** of ***FAX*** must be included in the ***Phone Information*** for the default ordering address if ***FAX*** was selected to receive your purchase orders (***Step 4, h.***).

i. Select the ***Add Phone*** button to add a new telephone number. A ***Phone Type*** of ***FAX*** must be included in the ***Phone Information*** for the default ordering address if ***FAX*** was selected to receive your purchase orders (Step 4, h.).

j. The buttons next to ***Approved Changes Take Effect*** can be used to identify if changes should become effective when the supplier change request is approved or if the changes should be effective on some future date.

k. Select the ***OK*** button once all changes have been made for the address.



l. When the ***Add New Address*** button is selected in ***b.*** above, the ***Description*** can be completed by selecting the magnifying glass to see the list of valid selections which are used to identify if the address should be used for ordering only, remittances only, or both ordering and remittances.

m. For firms based in the United States of America, the ***Country*** code will default to USA and is not updatable. Foreign-based firms can select the appropriate ***Country*** code by clicking on the magnifying glass and selecting from the list of valid ***Country*** codes.

n. ***Address line 1***, ***City***, ***County***, ***State***, and ***Postal*** are all required. ***Address lines 2***, ***3***, and ***4*** should be used if more space is needed than provided in ***Address line 1***.

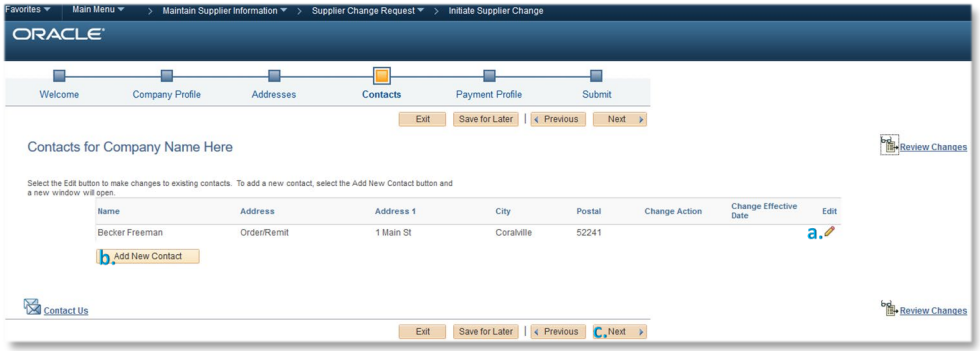
o. The ***Phone Information*** section must include a ***Phone Type*** of ***Business Phone*** at a minimum. The list of valid ***Phone Types*** can be viewed by selecting the field to see a list of valid values.

p. Select the ***Add Phone*** button to add a new telephone number and ***Phone Type***.

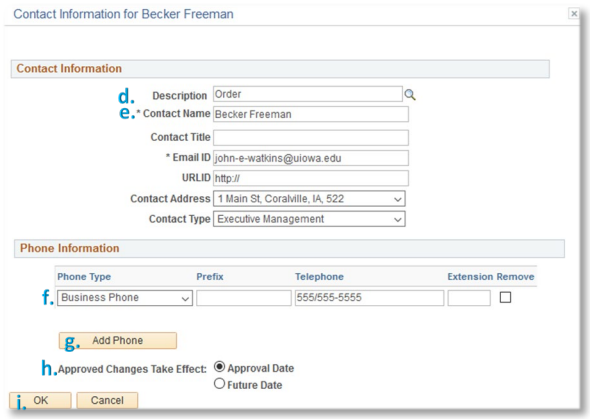
q. The buttons next to ***Approved Changes Take Effect*** can be used to identify if changes should become effective when the supplier change request is approved or if the changes should be effective on some future date.

r. Select the ***OK*** button once all changes have been made for the address.

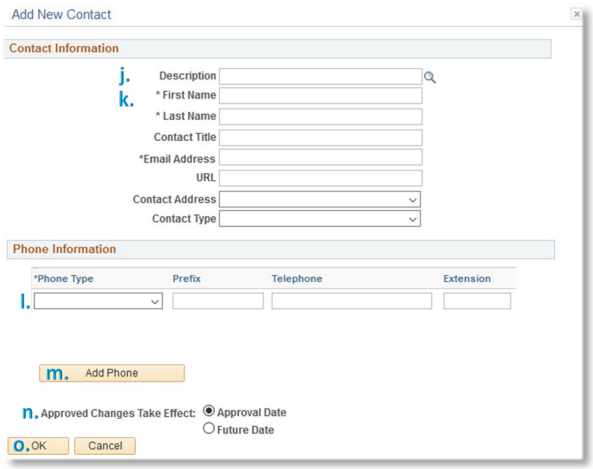
Step 6 – Contacts



a. Select the ***Edit*** button to make changes to an existing address.
b. Select the ***Add New Contact*** button to enter a new contact at your firm.
c. Select the ***Next*** button to continue to ***Step 7***.



d. When the ***Edit*** button is selected in ***a.*** above, the ***Description*** can be updated by selecting the magnifying glass to see the list of valid selections.
e. The ***Contact Name***, ***Contact Title***, ***Email ID***, ***URLID*** (your firm's web address), ***Contact Address*** and ***Contract Type*** can all be updated as appropriate. ***Contact Name***, ***Email ID***, ***Contact Address***, and ***Contact Type*** are all required.
f. The ***Phone Information*** section must include a ***Phone Type*** of ***Business Phone*** at a minimum. The list of valid ***Phone Types*** can be viewed by selecting the field to see a list of valid values.
g. Select the ***Add Phone*** button to add a new telephone number and ***Phone Type***.
h. The buttons next to ***Approved Changes Take Effect*** can be used to identify if changes should become effective when the supplier change request is approved or if the changes should be effective on some future date.
i. Select the ***OK*** button once all changes have been made for the address.



j. When the ***Add New Contact*** button is selected in ***b.*** above, the ***Description*** can be completed by selecting the magnifying glass to see the list of valid selections.

k. The ***First Name***, ***Last Name***, ***Contact Title***, ***Email Address, URL*** (your firm's web address), ***Contact Address*** and ***Contract Type*** can all be entered. ***First Name, Last Name***, ***Email Address***, ***Contact Address***, and ***Contact Type*** are all required.

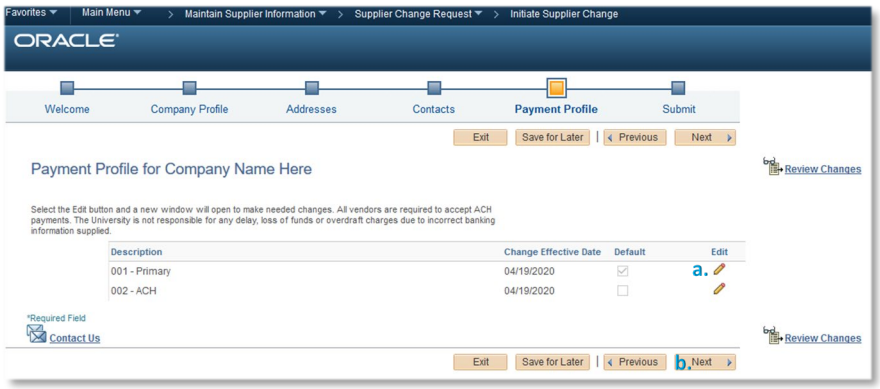
l. The ***Phone Information*** section must include a ***Phone Type*** of ***Business Phone*** at a minimum. The ***Phone Type*** can be changed by selecting the field to see a list of valid values.

m. Select the ***Add Phone*** button to add a new telephone number and ***Phone Type***.

n. The buttons next to ***Approved Changes Take Effect*** can be used to identify if changes should become effective when the supplier change request is approved or if the changes should be effective on some future date.

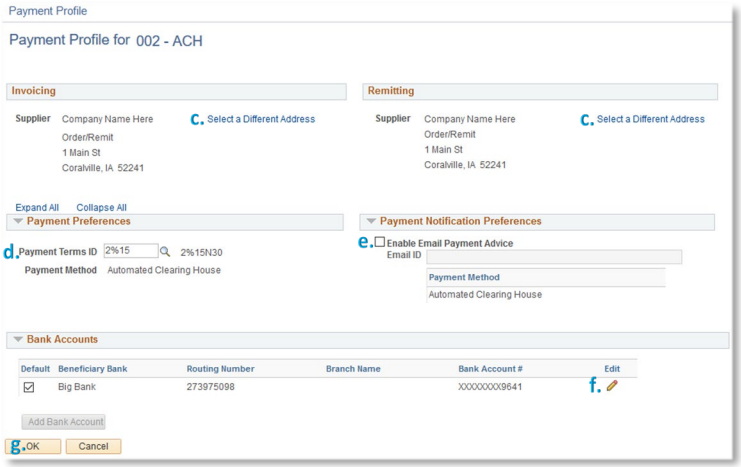
o. Select the ***OK*** button once all changes have been made for the address.

Step 7 – Payment Profile



a. Select the ***Edit*** button to make changes to the ***001 - Primary*** or ***002 - ACH*** location for your firm.

b. Select the ***Next*** button to continue to ***Step 8***.



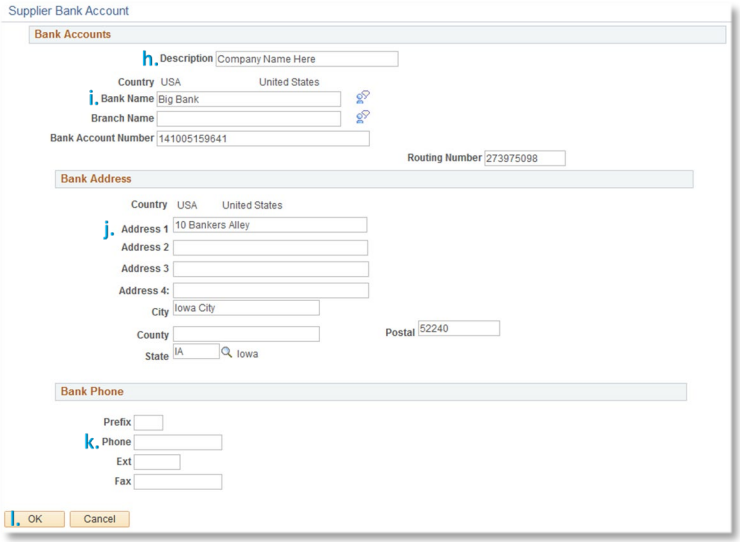
c. Use the ***Select a Different Address*** hyperlinks to change either the Invoicing or Remitting address for the ***001 - Primary*** and ***002 - ACH*** location(s) for your firm when needed.

d. The default ***Payment Terms ID*** for the ***001 - Primary*** and ***002 - ACH*** location(s) can be changed by selecting the magnifying glass to see a list of valid payment terms.

e. On the ***002 - ACH*** location, ***Payment Notification Preferences*** can be set for ACH payments. The ***Enable Email Payment Advice*** checkbox should be checked on to receive an ACH payment notifications and when checked on an Email ID must also be entered. If the ***Enable Email Payment Advice*** checkbox is unchecked, no ACH payment notification will be sent.

f. On the ***002 - ACH*** location, select the ***Edit*** button to make change to ***Bank Account*** information.

g. Select the ***OK*** button once all changes have been made for the ***Payment Profile***.



h. The ***Description*** should be updated if there is a change in your firms ***Legal Name***.

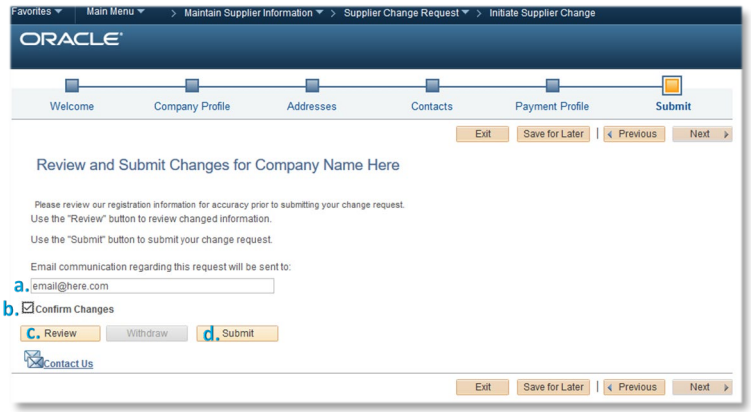
i. The ***Bank Name***, ***Branch Name***, ***Bank Account Number*** for ACH payments, and the ***Routing Number*** for ACH payments can all be updated in the ***Bank Accounts*** section. The ***Bank Name***, ***Bank Account Number***, and ***Routing Number*** are all required.

j. If updated, the ***Address line 1***, ***City***, ***County***, ***Postal*** and ***State*** are all required. ***Address lines 2***, ***3***, and ***4*** should be used if more space is needed than provided in ***Address line 1***.

k. The ***Phone*** can be entered or updated in the ***Bank Phone*** section. If entered, please use the following format: 999/999-9999.

l. Select the ***OK*** button once all changes have been made for the ***Supplier Bank Account***.

Step 8 – Submit



a. Verify that the correct email address for any communications regarding this supplier change request is included in the ***Email*** field.
b. To confirm all changes, select the ***Confirm Changes*** hyperlink.
c. To review all changes, select the ***Review*** button.
d. Select the ***Submit*** button to send the supplier change request to the University for final review and approval.