Before Requesting a New Supplier

*Note:* If a supplier is inactive for 18 months, the UM department will need to submit a “New Supplier Request for Purchase Order form.” Also, it’s best practice to check if a supplier already exists that provides the same type of goods or service you are looking for before requesting a new supplier be added to the system.

**Summary of Steps:**

1. Check Workday to see if the supplier appears with the correct address and a current certificate of insurance.
2. Check UMarketplace to see if the supplier appears with a green checkmark and a “p” number. Supplier notes and contact information will also appear here.
3. If the supplier does not appear in either Workday or UMarketplace, submit a New Supplier Request for Purchase Order form.

### Step 1 Breakdown - Check Workday

**Check if the supplier appears with the correct address and current certificate of insurance.**

a. In the search box, type **Find Suppliers** and click Enter on keyboard.

b. Click **Find Suppliers**

c. In the **Supplier Name** field, type the supplier’s name. (e.g., “Stryker”)
d. Click **OK**
- If the supplier does not appear in Workday, skip to step 2 to check UMarketplace.
- If the supplier does appear, continue with step 1e.

<table>
<thead>
<tr>
<th>Supplier</th>
<th>Supplier Name</th>
<th>Supplier ID</th>
<th>Supplier Status</th>
<th>Supplier Category</th>
</tr>
</thead>
<tbody>
<tr>
<td>STRYKER SALES CORPORATION</td>
<td>p18005951</td>
<td>Active</td>
<td>Medical Supplies</td>
<td></td>
</tr>
<tr>
<td>STRYKER SALES CORPORATION</td>
<td>p16506238</td>
<td>Active</td>
<td>Scientific Supplies</td>
<td></td>
</tr>
</tbody>
</table>

e. To select a supplier, click the magnifying glass.

*Note:* multiple suppliers with the same name may appear. Always check the contact information tab to compare the different addresses of the supplier to your quote, estimate, invoice, etc. This will ensure you are selecting the correct supplier with the corresponding address.

f. To check the corresponding address, click the “Contact Information tab.”

g. Scroll down and view the addresses. If the correct address appears, copy the “p” number listed at the top left corner of the screen. This can be used to ensure the correct supplier is used when creating a requisition. **Do not use the “p” number listed on the right.** If the correct address does not appear, skip to Step 2.

h. To view the certificate of insurance, click the “Summary tab” and review the “Certificate of Insurance Date.”
## Step 2 Breakdown - Check UMarketplace

Check to see if the supplier appears with a green checkmark and a “p” number. Supplier notes and contact information will also appear here.

<p>| | |</p>
<table>
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</table>
| a. From the Workday dashboard, click **Purchases**. | ![Purchases](image)
| b. Click **Connect to Supplier Website** | ![Connect to Supplier Website](image)
| c. This page may or may not appear. If it appears, skip it by clicking **OK**. If it does not appear, click **Connect**. | ![Connect](image)
| d. Click **Connect** | ![Connect](image)
| e. Click **Suppliers** icon (left hand column) | ![Suppliers](image)
| f. Click **Search for a Supplier** | ![Search for a Supplier](image)
g. Type the supplier name (e.g., “Stryker”) and click **Go**. If the supplier does not appear in UMarketplace, skip to Step 3 below to complete a **New Supplier Request for Purchase Order form**.

<table>
<thead>
<tr>
<th>Search</th>
<th>Stryker</th>
<th>Go</th>
<th>Advanced search</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enter search terms such as Legal Company Name or Supplier ID.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

h. A requisition can be initiated and submitted if a supplier has both a **green check mark** and a “p” **number**.

If the supplier appears and the green checkmark or “p” number is missing contact, supplychain.supplierapp@miami.edu.

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i. To view the contact information and notes, click the **supplier name**.

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- **STRYKER SALES CORPORATION** (STRYKER MEDICAL DIVISION, MCKESSON SUPPLIER)
  - Supplier Number: p18005951
  - Registration Status: Profile Complete
  - Registration Type: Complete Supplier Application
j. Scroll down to view who the invite was sent to.

<table>
<thead>
<tr>
<th>Supplier Registration Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date Registered</td>
</tr>
<tr>
<td>Invitation Sent to</td>
</tr>
<tr>
<td>Invitation Sent by</td>
</tr>
<tr>
<td>Last Updated</td>
</tr>
</tbody>
</table>

k. For additional supplier notes, click **Workflow and Review** then **Internal Notes**. (left column)
# Step 3 – New Supplier Request for Purchase Order Form

If the supplier does not appear in either Workday or UMarketplace, complete a New Supplier Request for Purchase Order form and review the registration status.

**Note:** If a supplier is inactive for 18 months, the UM department will need to submit a “New Supplier Request for Purchase Order form.”

### a. Before requesting a New Supplier:
- Check if the requisition can be created using an existing supplier. There are multiple suppliers in the system that provide the same goods or services you are looking for and therefore you should use an existing supplier instead of requesting a new supplier be added to the system.

### b. Before completing the New Supplier Request for Purchase Order form, contact the supplier and request the following information:
- Name, phone and email of the person at the supplier’s company that will be completing the supplier application.

**Note:** If supplier contact phone is “International,” type “your UM phone number” in the “Supplier Contact Phone” field. Then, in the “Business Reason” field, type the “supplier’s international phone number.”

**Note:** It is very important the supplier provide you with the correct email address of the person who will complete the supplier application. The reason being, once the individual receives the application invite, it can’t be forwarded to another employee within the supplier's company, due to the link will become invalid.

- Has anyone at the requested company been an employee of the University of Miami in the last 12 months? - Check Yes or No
- Is this vendor owned directly or indirectly by a physician or immediate family member of a UM physician? Check Yes or No

### c. Click UM Quicklinks, from UM dashboard

![UM Quicklinks](image)

### d. Click New Supplier Request for Purchase Order

![03. New Supplier Request for Purchase Order](image)
e. Complete **New Supplier Request for Purchase Order** Form

- **Commodity Type** – click the magnifying glass. The pop-up blocker may need to be disabled. Search for a corresponding commodity type. If the commodity does not appear, select “Other” and specify the commodity (e.g., prescription drugs for human study).
- **Supplier’s Contact Information** – complete using the information from step 3b
- **Add Supplier to the Meperia System** – If it’s for medical/surgical supplies, check “Yes.”
- **UM Hospital Vendor** - If the item will be shipped to UHealth Tower (formerly UMH), check “Yes.”
- **Will there be a contract or agreement created for this supplier?** – Only check “Yes,” if doing business with this company will require a signed contract.
- **Has anyone at the requested company been an employee of the University of Miami in the last 12 months?** - Check Yes or No
- **Is this vendor owned directly or indirectly by a physician or immediate family member of a UM physician?** - Check Yes or No
- **Business Reason** – Provide an explanation as to why you are requesting for the supplier to be added to the system.

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<tbody>
<tr>
<td>f. Click Submit Order</td>
<td>Submit Order</td>
</tr>
<tr>
<td>g. An RITM or REQ number will be issued. Save this in case there are issues with the request. This is the Purchasing Data Teams only way to look up the request.</td>
<td></td>
</tr>
<tr>
<td>h. Check the status of the Supplier Onboarding process, using Steps 1 and 2 above.</td>
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</tr>
</tbody>
</table>

**Additional Resources**

**Purchasing**
- General Support Phone: 305-284-5751
- General Support Email: supplychain.supplierapp@miami.edu
- Academy Training Contact: Heidi Tyre htyre@miami.edu
- UHealth Training Contact: Madeleyne Barcelo m.barcelo@miami.edu

**Risk Management**
- [Certificate of Insurance (COI) Example](#)
- [Supplier Insurance Requirements](#)