

# Create Supplier Request: Completing the Request

1. Fill out and submit the form as usual. Make sure to include:

- A. Supplier Category
- B. Tax Authority Form Type
- C. Tax ID
- D. Justification
- E. Address
- F. Email or Phone

Please note: An explicit description under **Justification** will help Procurement understand the need during their review.

The screenshot shows a 'Create Supplier Request' form in Workday. The form is filled out with the following information:

- Worker:** Submitter, Joseph
- Supplier Name:** NYERICK ELECTRIC
- DUNS Number:** (empty)
- Restricted to Companies:** (empty)
- Supplier Category:** 03 US Corporation (highlighted with a red box and labeled 'A')
- Parent:** (empty)
- Tax Authority Form Type:** 1099 MISC (highlighted with a red box and labeled 'B'). An alert message below this field reads: "Alert: Enter an address for 1099 MISC suppliers."
- TIN Type:** 1 - EIN
- Tax ID:** 00-0000000 (highlighted with a red box and labeled 'C')
- Justification:** Hiring electrician for 25 SP special project (highlighted with a red box and labeled 'D')

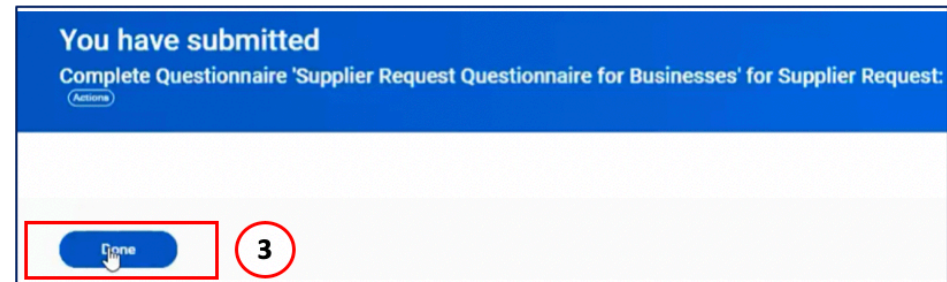
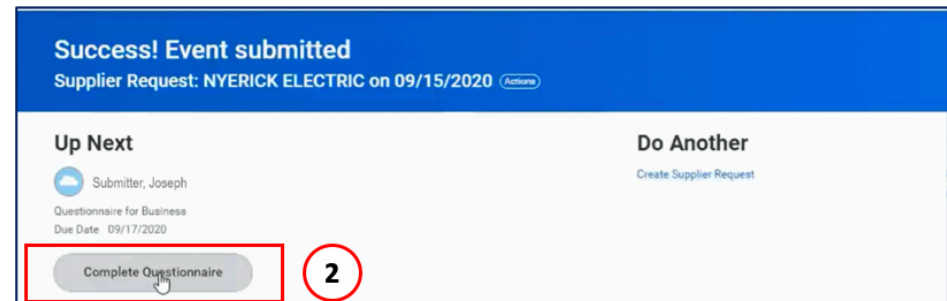
At the bottom of the form, there are 'OK' and 'Cancel' buttons.

# Create Supplier Request: Completing the Request (cont.)

2. After submitting the Supplier Request, a confirmation message will indicate that the submission was successful. However, it also indicates you are Up Next. Click the **Complete Questionnaire** button to complete the process.
  - **Responses to the questionnaire are required.** The Supplier Request will not route to Procurement or Accounts Payable until the questionnaire is completed and submitted.

*Note: Depending on whether the Supplier Request is for a Business Organization or a U.S. or Foreign Individual, the questionnaire will differ. Please refer to the following page for details on each questionnaire.*

3. After the questionnaire is completed, click **Done**.



# Supplier Request Questionnaire for Business

## Supplier Request Questionnaire for Business

- What is the estimated spend you anticipate with the supplier during the next 12 months?
- Is there a current university-preferred or alternative supplier identified in the Yale Buying Guide that supplies the same products or services?
- Is the supplier address located in a foreign country?
- Has the supplier requested an advance payment for prospective goods or services?
- Does the supplier meet any of the classifications below (e.g., Minority-owned Business, Women-owned Business)?
- Please check the commodity area for the supplier.
- If Purchase Orders will be issued to the supplier, provide the email address or fax number to which Pos will be sent.



# Supplier Request Questionnaire for Individuals

## Supplier Request Questionnaire for Individuals

- Is the individual a student? If yes, you will be prompted for the student's University Personal Identifier (UPI).
- Is the individual a Yale University employee? If yes, you will need to explain the rationale for payment via supplier.
- If Purchase Orders will be issued to the supplier, provide the email address or fax number to which the Pos will be sent.

