

SHARE Supplier Approver FAQ's and Reminders

SHARE Supplier Approver FAQ's:

1 How do I ask a question about a SHARE Supplier that I DO NOT have a ticket for yet?

- Send an email to the oneusgsupport@usg.edu support team with your question and the supplier id and name and a ticket will be created for you.

2 How do I ask a question about a SHARE Supplier that I have a ticket for already?

- Respond to the ServiceNow ticket email that you received from your existing ticket related to the specific supplier request.

3 Can I forward a ServiceNow ticket email back to the support email with an additional question?

- No, please just REPLY to the ServiceNow ticket email because if you forward the email back to the support email, it will create a new ticket and duplicate the supplier inquiry.

4 How do I submit documents for NEW SHARE Suppliers?

- Load the current, completed W9/SIF (2018 version) into the BOR form in PSFin when entering the new supplier information to submit for approval.

5 What documents are needed for creating a NEW supplier?

- The current, completed W9/SIF (2018 version).

6 How do I indicate that a NEW supplier approval is urgent?

- Once you submit the new supplier via the BOR form, send an email to oneusgsupport@usg.edu support team. Include the temporary supplier id from the BOR form and indicate that it is an urgent new supplier approval.

7 How do I submit documents for existing SHARE Supplier updates?

- Log into the FTP server and upload the current, completed W9/SIF (2018 version) to the Supplier folder.

8 How do I indicate that an EXISTING supplier update is urgent?

- When loading the documents via FTP add a note to the upload that it is urgent.

9 What documents are needed for adding a remittance address to an existing supplier?

- If there is an existing, current W9 on file in SHARE, then you can load an invoice showing the remittance address to the FTP server.
- If there isn't an existing, current W9 on file in SHARE, then log into the FTP server and upload a current, completed W9/SIF (2018 version) with the information listed

10 What documents are needed for updating a payment advice email address to an existing supplier?

- You can send an email to oneusgsupport@usg.edu indicating that you need to have the payment advice email updated.

11 What documents are needed for updating a bank account for an existing supplier?

- Log into the FTP server and upload a current, completed W9/SIF (2018 version) with the banking information.
- If there is existing banking information listed, please have them include the banking information on the SIF and indicate that the banking information needs to be updated.

12 What documents are needed for updating a business name for an existing supplier?

- Log into the FTP server and upload the current, completed W9/SIF (2018 version) to the Supplier folder.

13 What documents are needed for adding an additional bank account for an existing supplier?

- Log into the FTP server and upload a current, completed W9/SIF (2018 version) with the banking information.
- If there is existing banking information listed, please have them indicate that this is an additional bank account to be added.

14 How do I know what documents are needed for certain updates or new requests?

- See document: [https://www.usg.edu/gafirst-fin/documents/New and Existing SHARE Supplier Scenario and Doc Requirements - Production.pdf](https://www.usg.edu/gafirst-fin/documents/New_and_Existing_SHARE_Supplier_Scenario_and_Doc_Requirements_-_Production.pdf).

15 Can an institution document be substituted for the W9/SIF if it has the same fields?

- No, the official IRS and SSC documents must be submitted.

16 What is the pre-note process?

- Supplier is set up with Pre-note required flag checked.
- The next time an ACH pay cycle is run, a prenote record is included in the file that is sent to bank from the institution.
- The Prenote status updates to Pending with the date the file is created.
- The system then waits for a set number of days – 10 is the default number of days for most institutions as well as SHARE. The purpose of the wait days is to allow the bank time to notify the institution if there is something wrong with the prenote transaction.
- Once the wait days pass, the prenote status will update to confirmed automatically and the date is updated as well.

17 Will you accept submissions from an individual other than a SHARE Supplier Approver?

- No

18 Will you communicate with anyone other than a SHARE Supplier Approver?

- No

19 How do we add additional individuals as a SHARE Supplier Approver?

- One of the PSFin Security Admins will need to send an email to oneusgsupport@usg.edu indicating the individual(s) that need to be added to the list of SHARE Supplier Approvers.

20 What access do the SHARE Supplier Approvers need?

- FTP account and access to the Supplier folder for your institution.
- PSFin access, including the new BOR_PO_SHARE_SUPPLIER_CREATE role.

21 What are the SHARE Supplier Approver responsibilities?

- Reviewing the W9/SIF for the current version (2018 revision) and completed.
- Data entry for NEW SHARE Suppliers via BOR page.
- Loading the current version (2018 revision) W9/SIF into PSFin for NEW SHARE Suppliers.
- Submitting current and complete W9/SIF (2018 revision) documents via FTP for existing SHARE Supplier updates.
- Submitting inquiries related to suppliers via ServiceNow by
 - Responding to ticket email if one exists.
 - Sending an email to oneusgsupport@usg.edu to have a ticket created for the inquiry that doesn't already have one.
- They will be the contacts for supplier related issues.

22 How do I search the SHARE tables to determine if there is an existing supplier ID to use?

- Navigate to Suppliers > Supplier Information > Add/Update > Review Suppliers.
- Enter SHARE for the SETID.
- For ID Type select Tax Identification Number.
- Enter the TIN for the supplier you are updating.

- Click Search. All associated addresses for the supplier will display on the page.
- If you need more info, click on the Actions drop down and select Maintain supplier.
- You will be redirected to the SHARE supplier record and have read only access to look up additional info as need.

23 Why would the 'open for ordering' flag be removed?

- In most cases, the open for ordering flag is removed due to the supplier existing as a duplicate supplier.

24 Can the institution call the supplier to clarify their tax classification on the W9?

- Yes, the institution can call the supplier to clarify the supplier's tax classification. The institution should make a note on the W9 clarifying the supplier's tax classification.

25 Can we update a supplier's email or phone number on the address without a new W9 and SIF?

- Yes, you can send an email to oneusgsupport@usg.edu and provide the new email or phone number. The update will be made from the ticket.

26 Can we submit multiple supplier updates on one ticket?

- No, each supplier should have it's own ticket for their set of updates.

27 Is there a way for SHARE Supplier Approvers to search their tickets online?

- Yes, the SHARE Supplier Approver can use the following url to review your tickets and responses:
 - i. <https://usg.service-now.com/usgsp>
 - ii. On the top banner, select 'My Incidents & Requests'

- iii. Select 'View all Incidents & requests' on the drop-down menu
- iv. The search function is listed above the list of tickets.

28 How do I pay my international supplier?

- If the bank account can be validated, they will be set up with ACH.
- If the bank account can't be validated, they will be set up as a check payment.

SHARE Supplier Approver Reminders:

- 1 DO NOT** share our phone number with suppliers as we don't take phone calls unless they are returning a call that we have made to them.
- 2 DO NOT** email the SSC SHARE Supplier team members directly.
- 3 DO NOT** add additional individuals to your email or ticket as we can't communicate with them regarding suppliers and will remove them prior to responding to the ticket.
- 4 DO NOT** add a general distribution email address to your email or ticket as we will remove them prior to responding to the ticket.