UNIVERSITY OF WYOMING | Procurement and Payment Services

Supplier Self-Registration Guide for Businesses

This guide will cover:

- Important Information Before Starting
- Required Documentation/Information To Get Started
- Accessing the Supplier Registration System (Step 1)
- Completing Required Fields/Information in the Registration System (Step 2-7)
- Final Steps

Important! Please Read:

If you are not a U.S. citizen, resident alien, or U.S. business, contact the Tax Office at tax@uwyo.edu or 307-766-2821 before beginning the Supplier Self-Registration process.

This guide is intended for new suppliers not already registered with the University of Wyoming. A supplier must be registered for any department on campus to request goods/services from. Below are the steps for registering with the University of Wyoming.

Step A: Verify whether you are currently registered as a supplier for the University of Wyoming and/or verify that your status is ***Active*** in our system:

Supplier Look-Up Tool

*If you are already registered with the University of Wyoming but need to make changes to your information or reactivate your supplier profile, please contact the Procurement and Payment Services department by emailing new-supplier-request@uwyo.edu.

Step B: If not currently registered, please continue with these Supplier Self-Registration Instructions.

Gather Your Information!

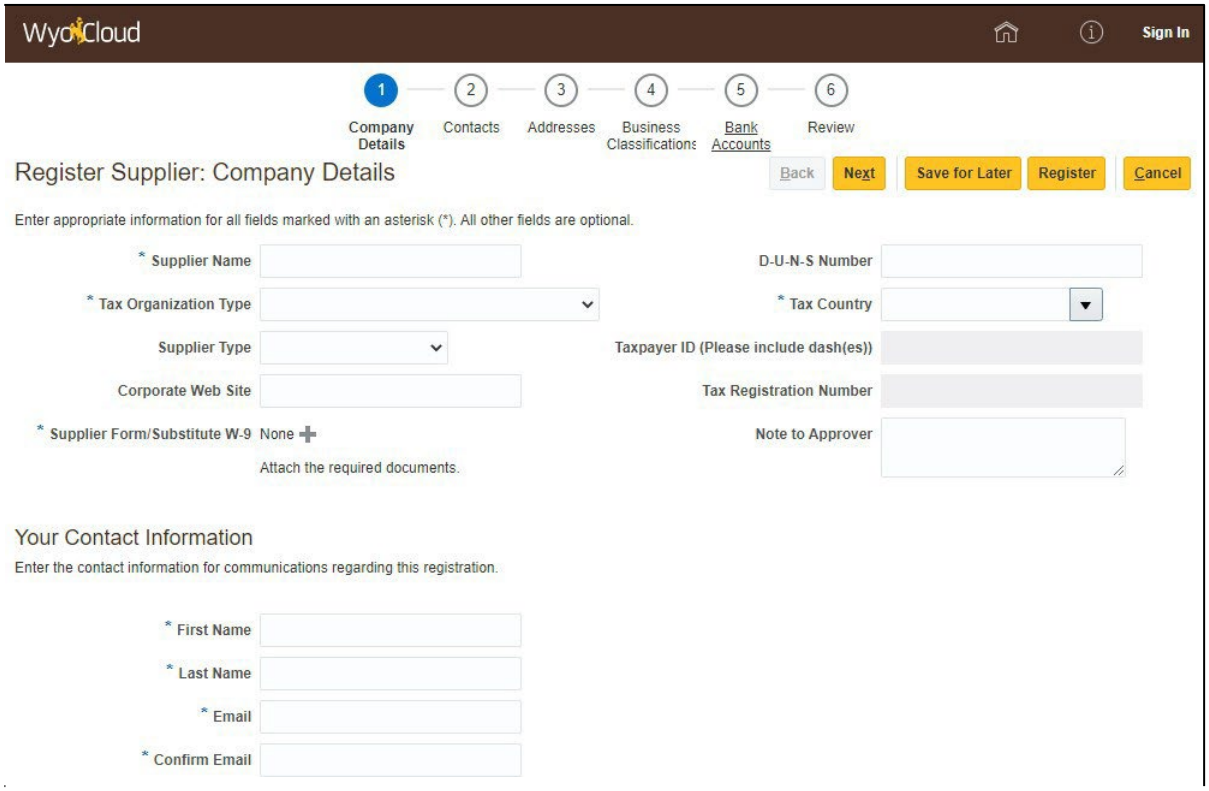
Before you begin, make sure you have the following information:

- Completed IRS Form W-9
- Supplier contact information
- Supplier business classification information and/or documentation
- Supplier bank account information if you'd like to receive ACH

Step One

Accessing the Supplier Registration System

- To access the supplier self-registration system, please follow this link: Supplier Self-Registration
- Once the website opens, the following screen will appear:



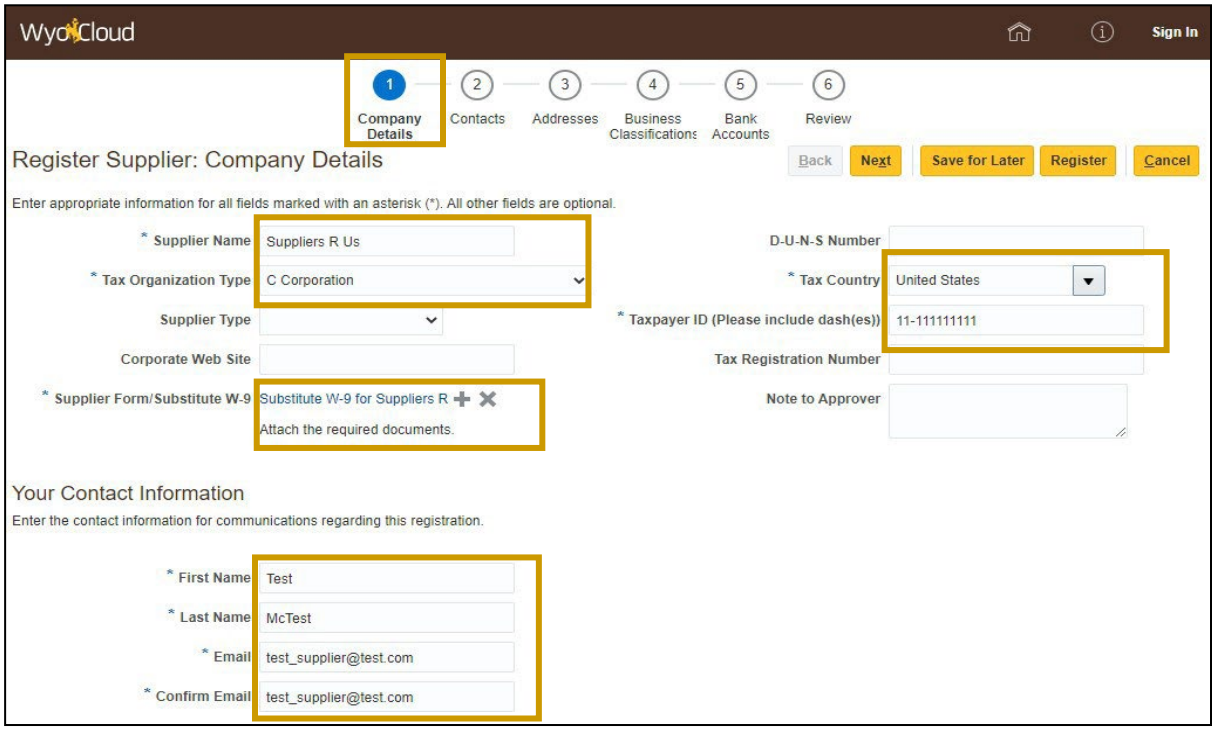
- The next steps will walk through each of the tabs at the top of the screen. All tabs must be completed as described below and all required fields within each tab must be completed accurately.

Step Two

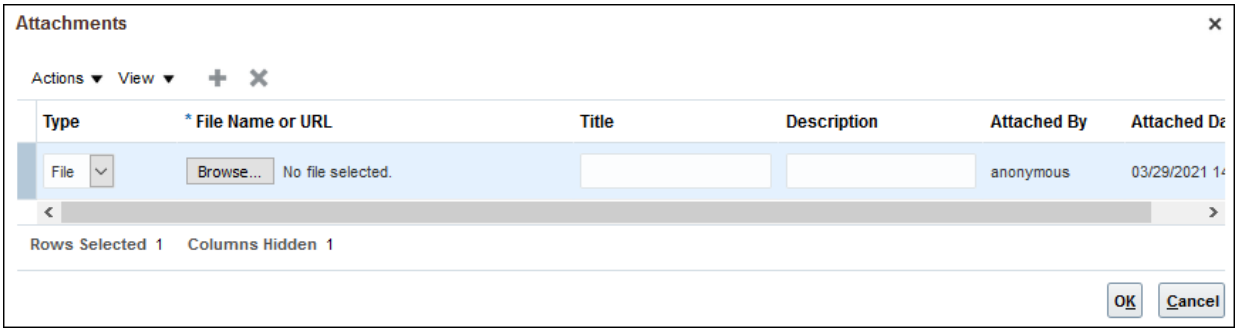
Tab 1 – Company Details

- Please enter the required information in fields marked with an asterisk. All other fields are optional.
    - **Supplier Name** – Name of the supplier – the name on your IRS Form W-9.
    - **Tax Organization Type** – Select the appropriate tax classification.
        - **Note:** Select the same tax classification that is selected on your IRS Form W-9 Box 3.
    - **IRS Form W-9 W-9** - You **must** attach a completed IRS Form W-9 (found on the Financial Affairs Forms webpage within the Procurement and Payment Services dropdown and under the Procurement header) with an ***original handwritten signature or authenticated Adobe digital signature or authenticated DocuSign electronic signature with validation envelope intact.***

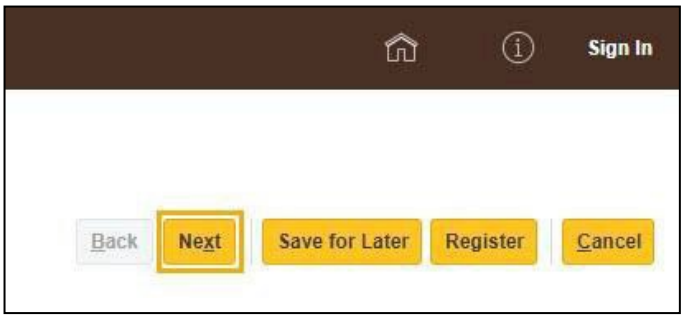
- **First Name** – Contact person's first name
- **Last Name** – Contact person's last name
- **Email** – Contact person's email address
- **Confirm Email** – Re-enter the contact person's email address
- **Tax Country** – Select the appropriate country from the drop down
- **Taxpayer ID** – Enter the EIN/SSN of the supplier (with the appropriate dash(es))
    - For foreign businesses/individuals, this can include PAN/TAN/TIN (Permanent Account Number/Tax Deduction and Collection Account Number/Taxpayer Identification Number).



Example of the Attachments Screen below. Select **Browse** to locate the completed and signed IRS Form W-9 to be uploaded. A description is not necessary. Select **OK** to return to the Company Details page.



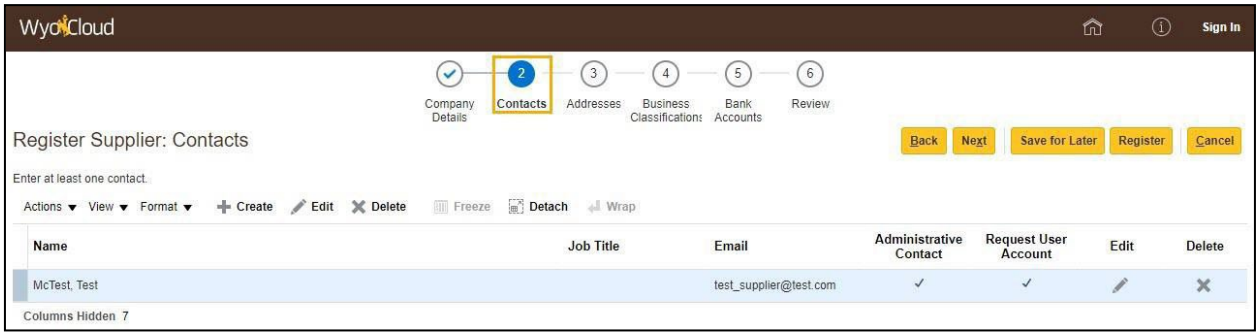
- Once all required fields are satisfactorily completed on the Company Details page, select **Next** in the upper right corner to move to the second tab (Contacts).



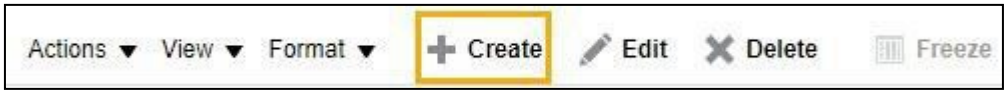
Step Three

Tab 2 – Contacts

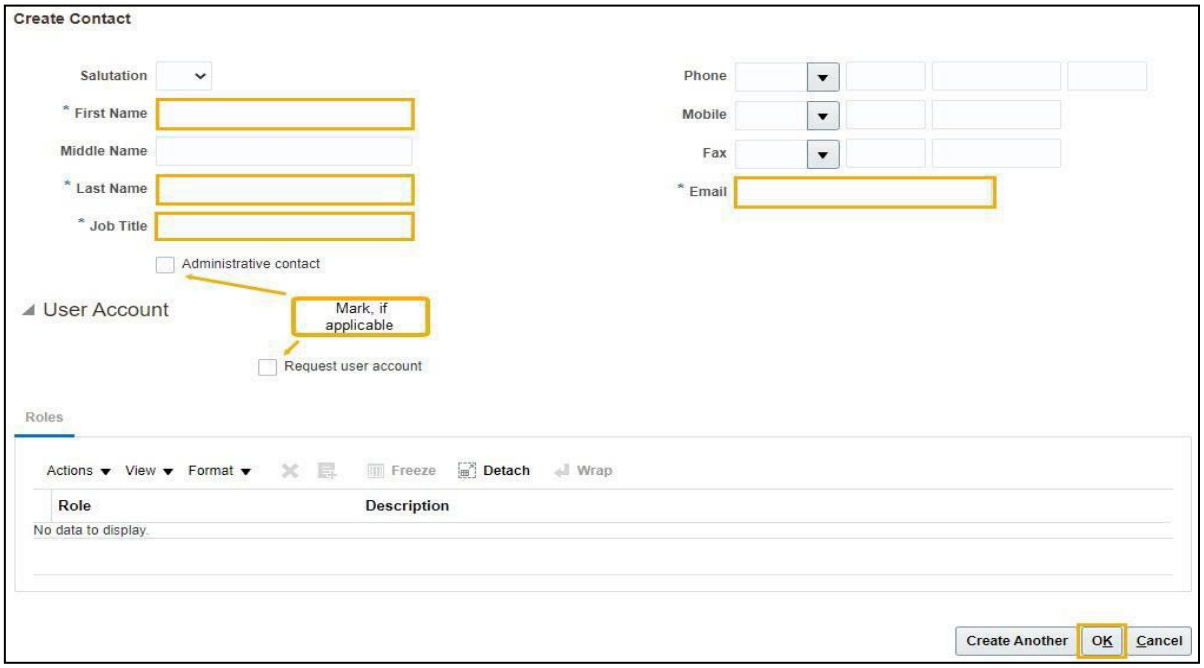
- The contact information entered on the first tab is automatically generated on tab2.



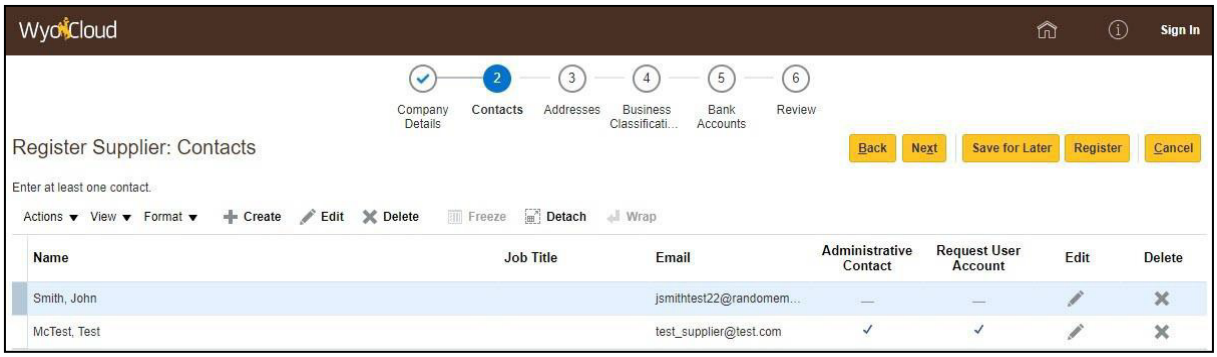
- If another contact is required, select the **+ Create** button.



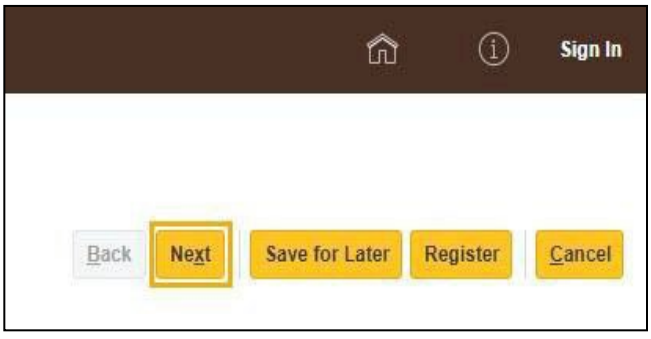
- Fill in the required information. If this will be an administrative contact only, select the checkbox next to Administrative Contact.
- It is **not required** to request a user account for additional contacts.



- The additional contact will appear in the contact list.



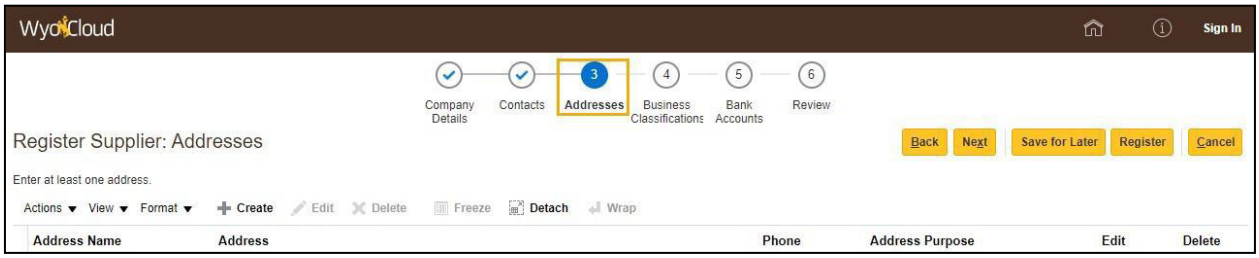
- Once the fields are successfully completed, select **Next** to move to the third tab (Addresses).



Step Four

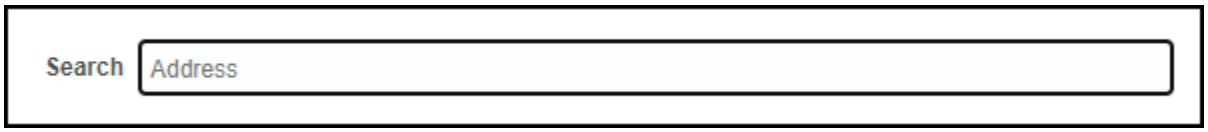
Tab 3 – Addresses

- At least one address must be created by a new supplier.

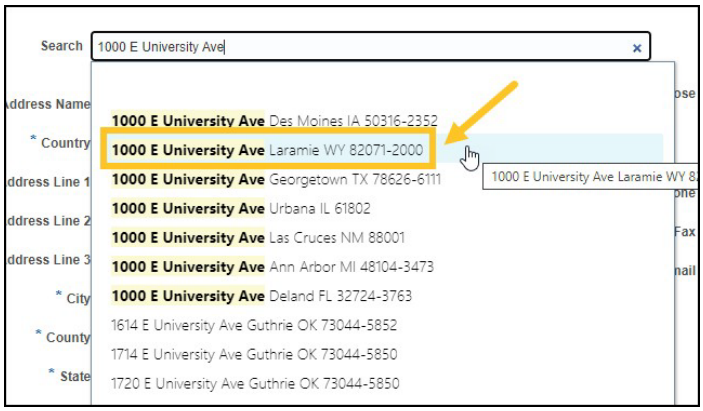


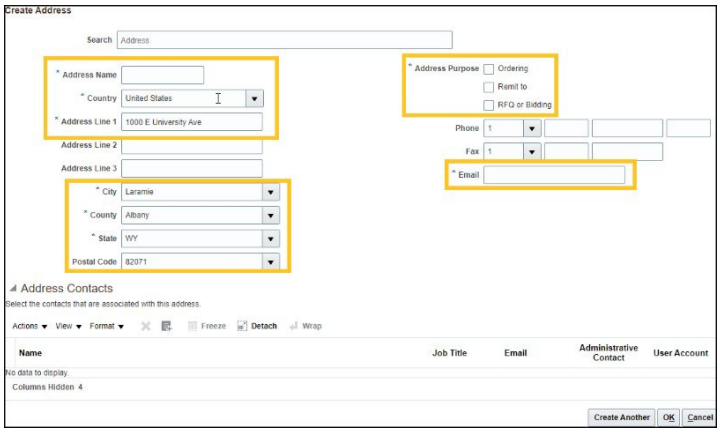
- To create a new address, select **Create**.

- You can search for your desired address on the supplier registration as shown below:

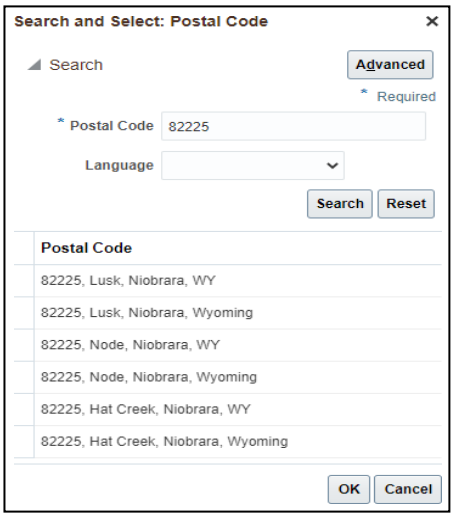


- Simply type in the address you are looking for and it will auto populate the fields below



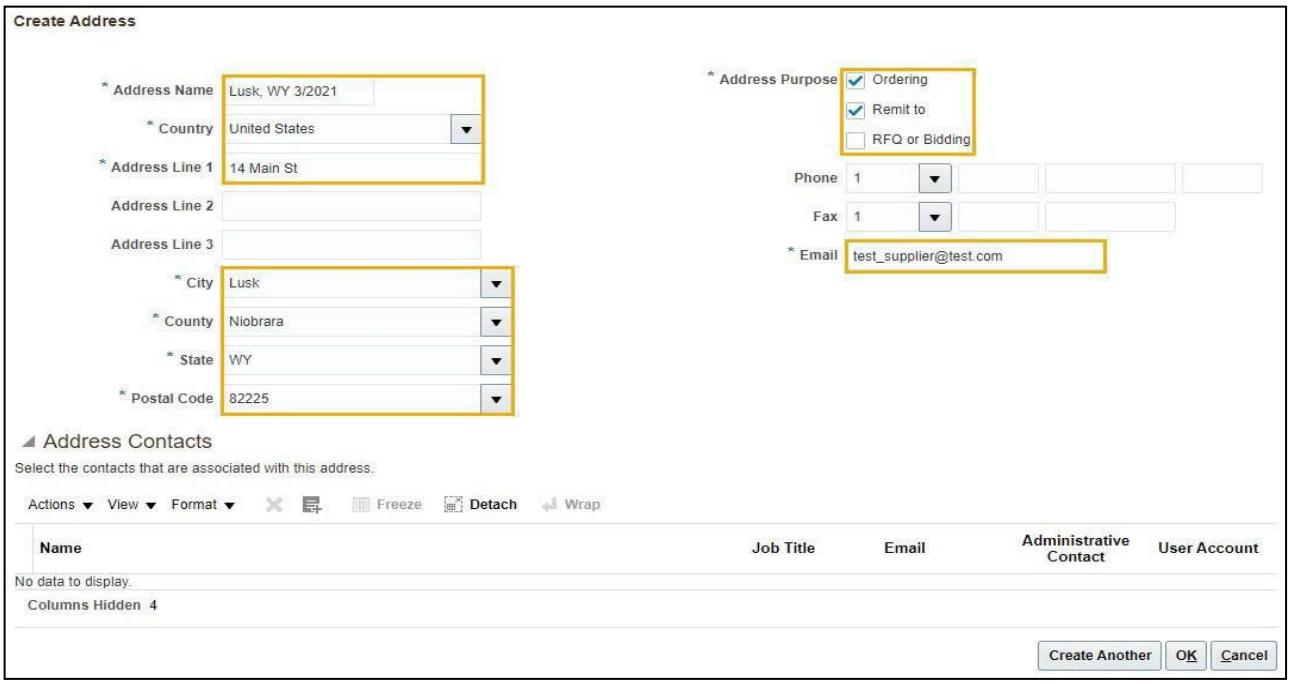


- If you elect not to use the search option, fill in all required fields (and any applicable optional fields).
    - **Special Instructions – Please enter your data in the following order:**
        1. Address Name (e.g. City, State, Month/Year).
        2. Country.
        3. Address Line 1.
            - *Optional:* Address Lines 2 & 3.
        4. Enter your Zip/Postal Code (before entering your City, County and State).
        5. Select Tab and a dialog box will appear with the City, County and State combinations available for the entered Postal Code.

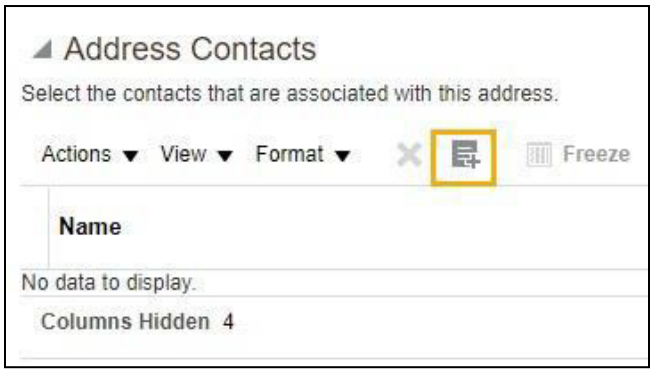


        1. Select the appropriate Postal Code, City, County and State combination.
        2. Select **OK** and the remaining City, County and State information will autofill.

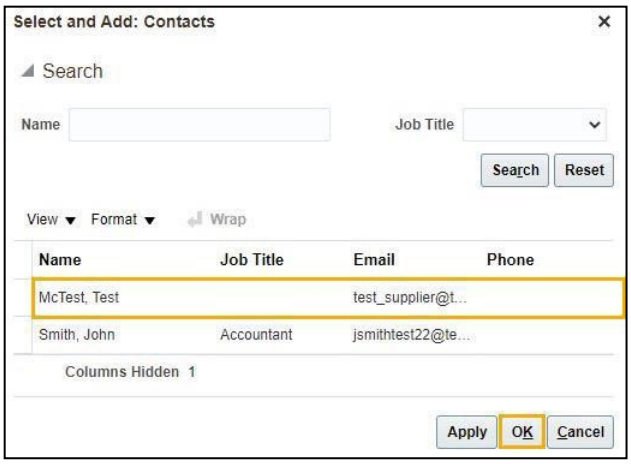
- For Address Purpose, please select **Ordering** and **Remit to**.



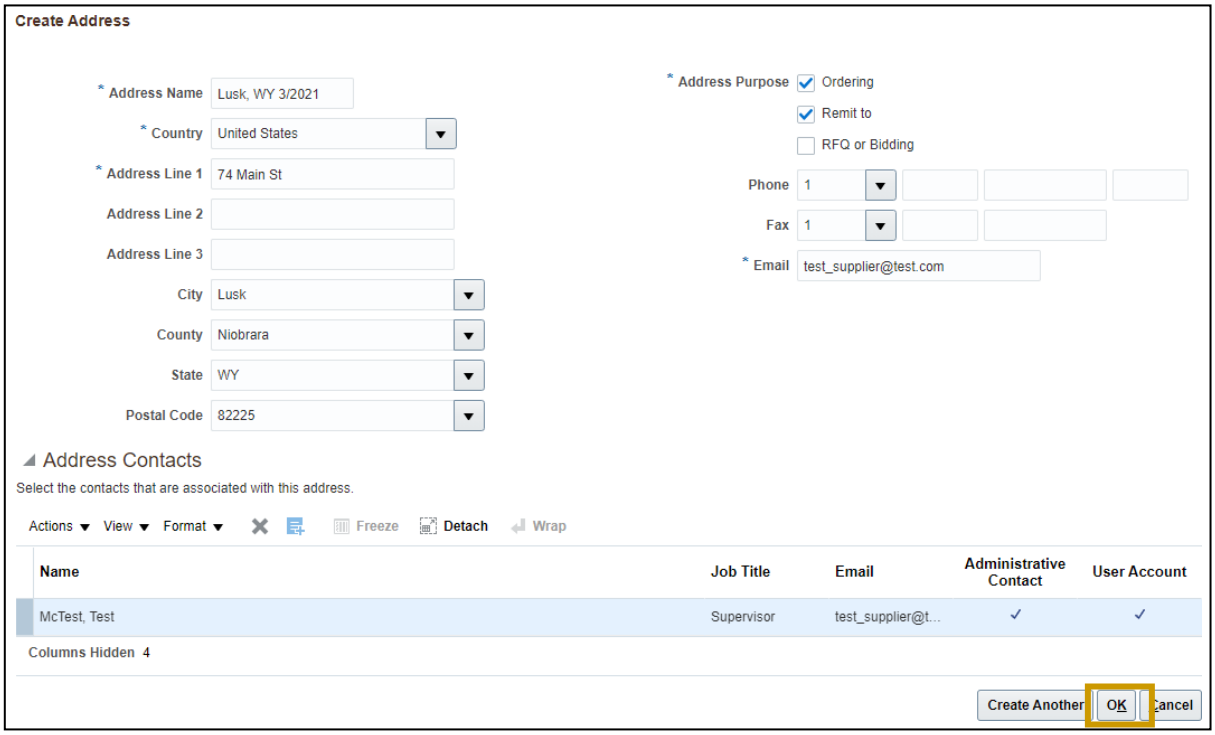
- To add an Address contact, select the **plus sign** below the Address Contacts header.



- The two listed contacts will appear. Select the appropriate contact, then select **Apply**, then **OK**.

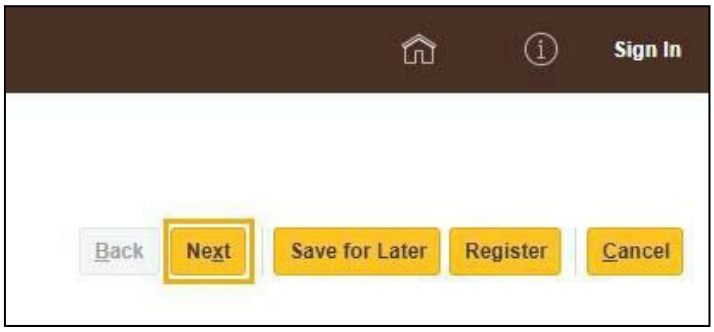


- The selected contact will now also serve as the contact for that specific address. Then select **OK**.



Create as many addresses as necessary using the **Create Another** button (above) or **Create** button (below). Either button will generate the intended results.

- When finished creating an address(es), select **Next** to move to the fourth tab (Business Classifications).

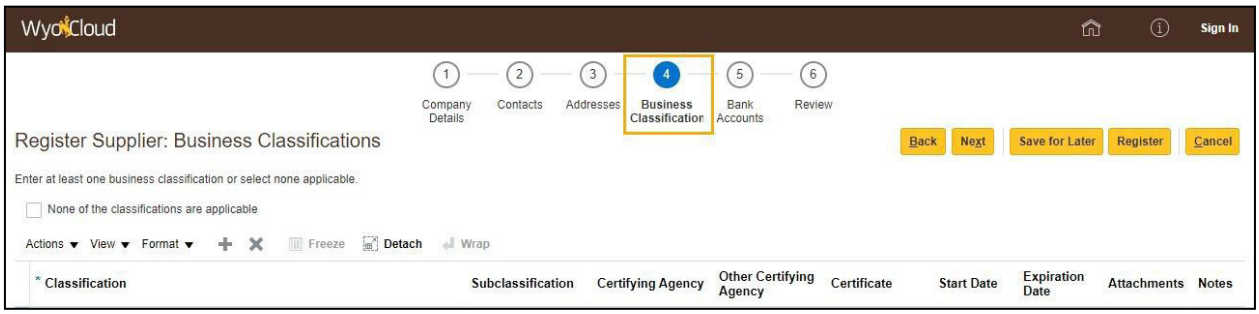


Step Five

Tab 4 – Business Classifications

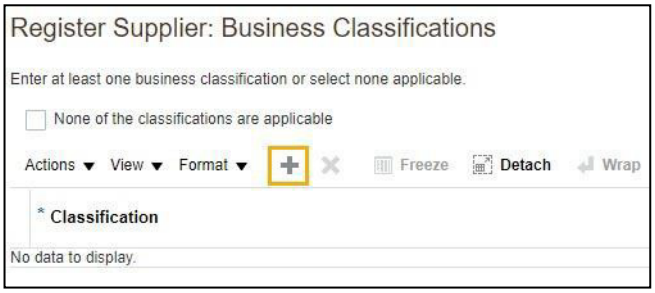
New suppliers have one of **two options**:

Option 1: Select a business classification from the list provided under Classification
Option 2: Select the checkbox next to "None of the classifications are applicable" if no classification is applicable.

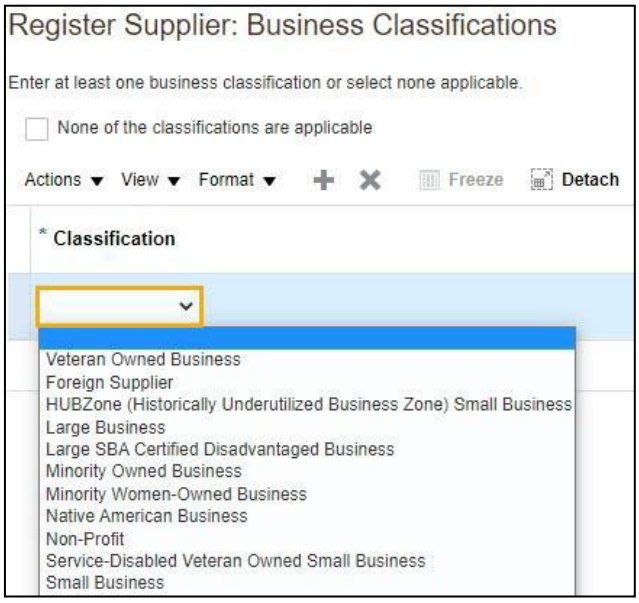


Option 1 Steps

- To select a classification from the list of values, select the **plus** sign.



- Under Classification, select the **dropdown arrow** and select the appropriate classification.

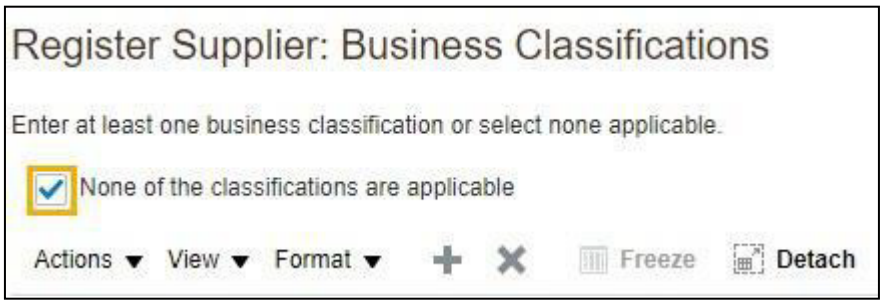


- If applicable, select **Other** in the Certifying Agency list of values.

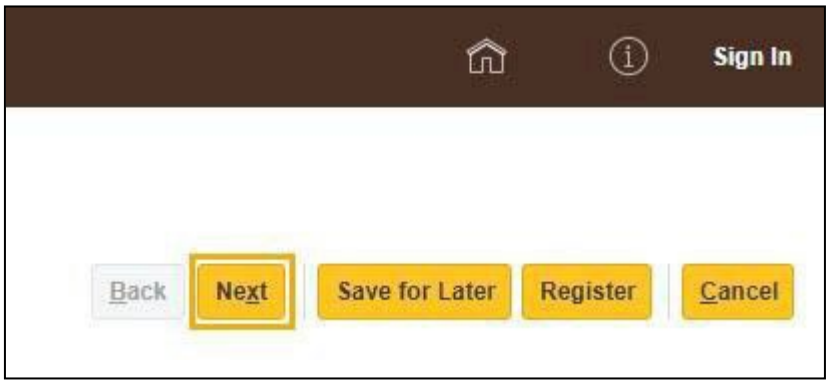
- Lastly, fill in/attach the remaining necessary information and documentation – **there is no requirement for attachments, but any amplifying information is helpful for verification.**

Option 2 Steps

- If you have no classification, select the checkbox next to "None of the classifications are applicable."



- When finished, select **Next** to move to the fifth tab (Bank Accounts).



Step Six

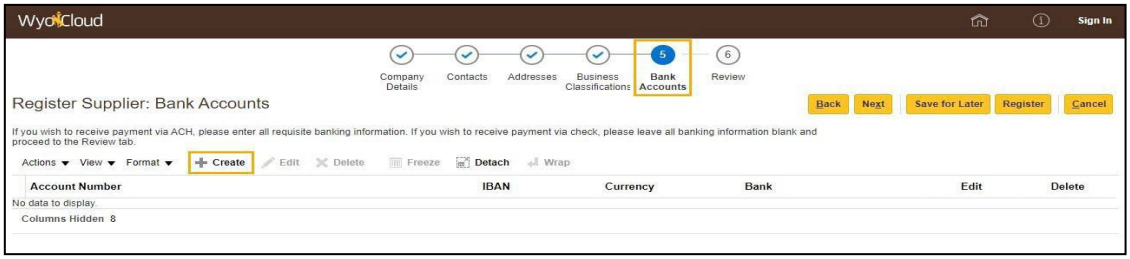
Tab 5 – Bank Accounts

If you wish to receive payment via check, please leave all banking information blank and proceed to the Review tab.

Foreign businesses/individuals wishing to receive a wire to an international account: Please leave all fields blank in Tab 5 and contact your UW representative after submission to facilitate your wire payment.

If you wish to receive payment via ACH, please enter all requisite banking information.

- To enter a bank account, select the **+ Create** button.

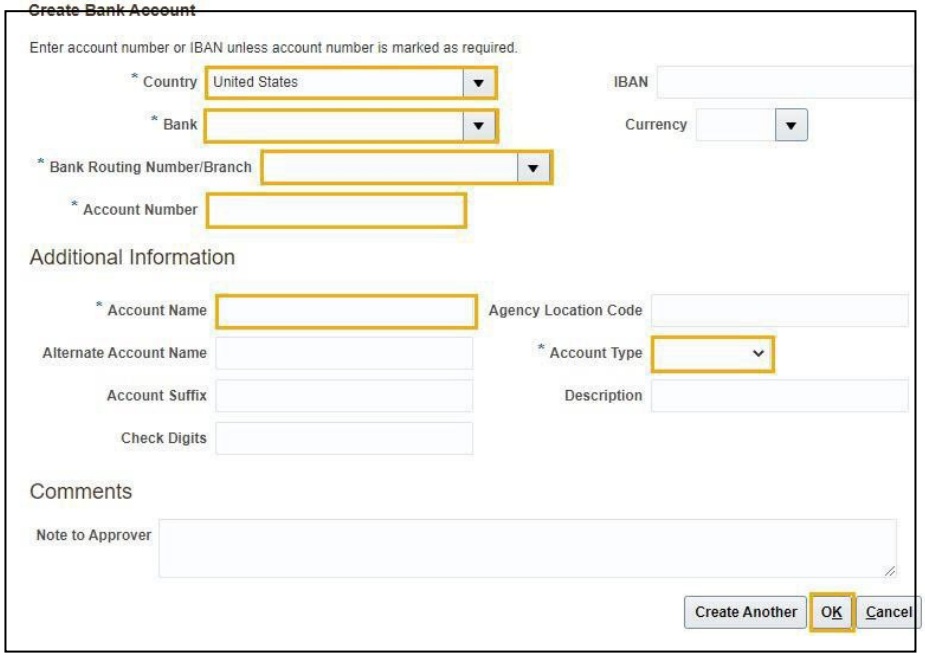


If your routing number does not appear in the Bank Routing Number/Branch list, please contact Procurement Services (new-supplier-request@uwyo.edu).

- **Special Instructions – Please enter your banking information in the following order:**

1. Select the drop-down arrow next to the **Country** field.
    - Select **Search**
    - Enter the appropriate country (e.g. United States) in the **Name** field.
    - Select **Search**
    - Select the correct country
    - Select **OK**.
2. Select the drop-down arrow next to the **Bank Routing Number/Branch** field.
    - Select **Search**
    - Enter your routing number in the **Branch Number** field.
    - Select **Search**
    - Select the correct **Branch Name** and **Branch Number**.
    - Select **OK**.

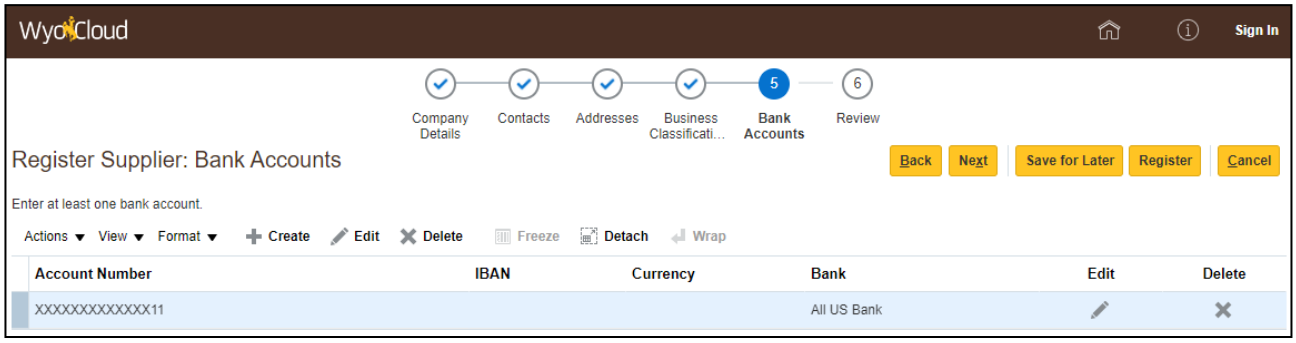
1. The **Bank** field will autofill.
3. Enter your account number in the **Account Number** field.
4. Enter a description of the bank account in the **Account Name** field (e.g. John Smith checking).
5. Select the account type from the **Account Type** drop-down (e.g. checking or savings).



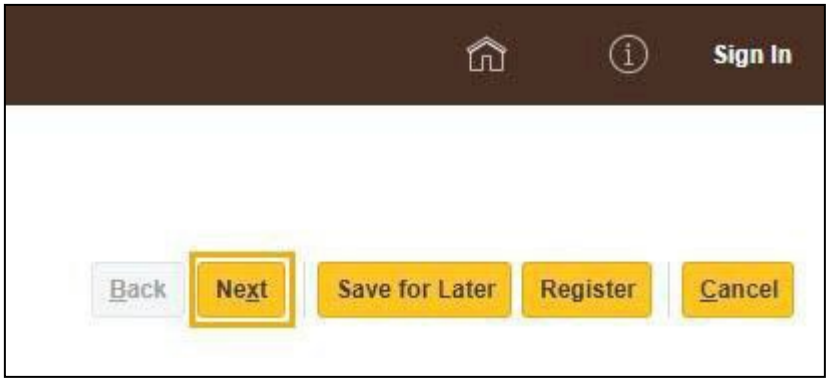
- If another bank account is required, select Create Another and follow the same process. Otherwise, select OK.

- The bank account number will now be masked.

If you wish to change the bank account number before submission, you must delete the entered bank account and re-enter with the correct information.



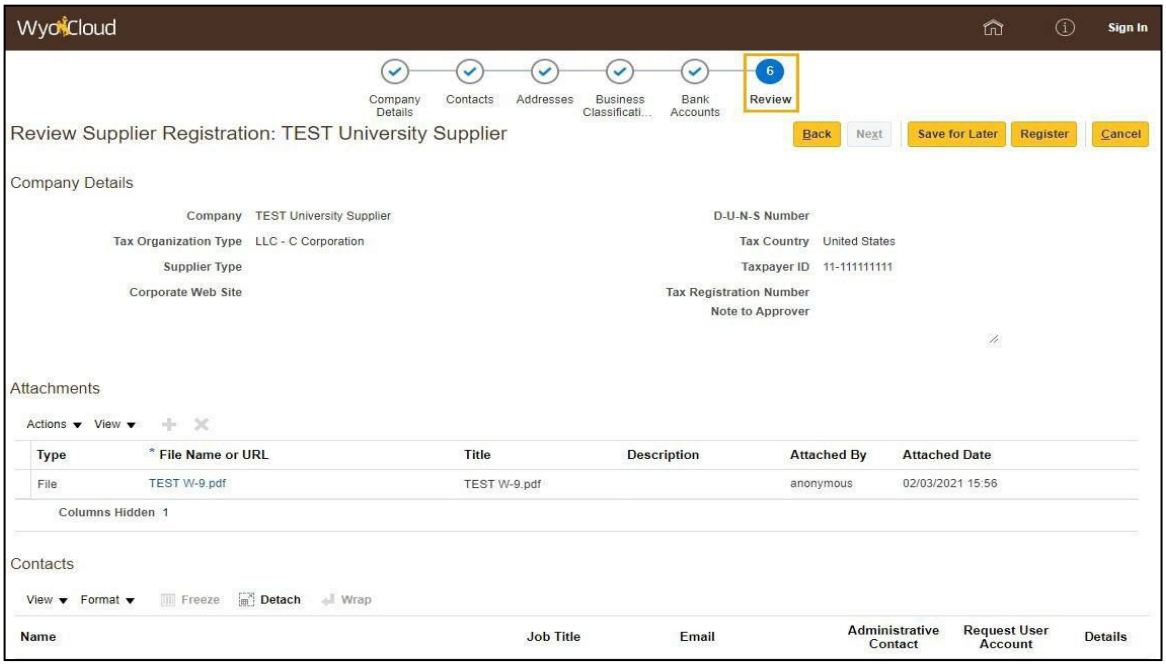
- Once the bank account(s) have been successfully entered, select **Next** to move to the sixth tab (Review).



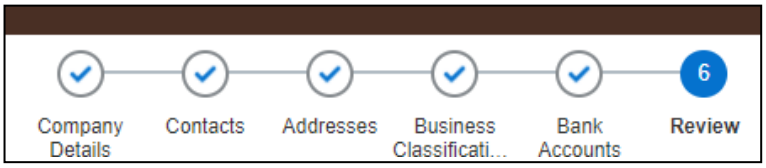
Step Seven

Tab 6 – Review

- Please review all entered information to make sure it is accurate andcorrect.



- If any changes are required, simply click on the appropriate tab and modify the information.



- Once the information has been satisfactorily reviewed, select the **Register** button.

- Click **OK.**

- You have completed all steps to register.

Final Steps

These steps have completed the process to submit your information to the University of Wyoming for review.

You will receive an email notification confirming your information has successfully been submitted. The Procurement Services department must review and approve the information before you become a registered supplier.

Procurement Services will be in touch with next steps after this review. The typical response time is 1-2 business days, but the response time may vary depending on Procurement operational requirements.

Upon approval from the Procurement Services department, you will receive another final email stating your registration approval. Once you receive this email, it is recommended you notify the university's department personnel you are working with regarding this approval so they can begin the purchase process.