



Supplier Setup Process in Workday – For Internal Use Only

When engaging a new supplier for a purchase order or an invoice payment, a supplier request must be initiated in Workday first, provided an existing supplier ID does not already exist. If a supplier ID is not set up in Workday, the purchase order and supplier invoice processes will be delayed. A purchase order cannot be setup and an invoice cannot be paid without an existing supplier ID in Workday.

*This is a significant process change from FMS because only supplier requests submitted directly in Workday will be processed. **Requests via email or ServiceNow tickets will not be accepted.***

Supplier Setup for New Suppliers

Supplier setup requests can be initiated by UBC employees. Submitting a supplier setup request directly in Workday ensure that UBC employees have better visibility into the process history of the request.

Alternatively, suppliers can self-register, but further actions are required by UBC employees to complete the request. Visibility into the process history is limited in Workday, compared to UBC employees initiating the request directly.

UBC employees can:

- Refer to the knowledge base articles on how to [search for existing suppliers](#) and how to [create a supplier setup request](#) in Workday.
- Refer to the [UBC Finance website](#) for supplier information requirements and supporting documents.
- Watch the training video on **how to view or find suppliers and request a supplier setup** in the online course [Workday Procurement, Receiving and Supplier Invoices](#).

Suppliers can:

- [Self-register](#) as a supplier - link includes process and registration portal. **Suppliers should check back in to the [self-registration portal](#) to confirm the status of registration within **five business days**. If registration was not successful, there will be notifications in the portal to inform suppliers on what information is missing. Email notifications **are now sent to suppliers** to inform them information is missing.**
- Refer to the [UBC Finance website](#) for supplier information requirements and supporting documents.

Important Note for UBC Employees Regarding Supplier Self-Registration

After a supplier has self-registered, the new supplier registration will then be reviewed and approved by the Finance supplier specialist and the UBC contact in Workday.

Supplier Information Changes

If a supplier requires changes to their information, **UBC employees must initiate the change request in Workday. Suppliers cannot update** their existing information in Workday directly. There are two types of change requests: **contact information** and **non-contact information** updates.

UBC employees can refer to the knowledge base articles on how to:

- [Change contact information](#) such as address, email, and phone.
- [Change non-contact information](#) such as banking information, tax ID, and residency status.



Please refer to the [UBC Finance website](#) for supplier information requirements and supporting documents.

Common Errors and How to Avoid Them

Supplier setup requests are sent back to the initiator when there is missing information or missing documents. To avoid delays in processing please ensure to provide all the required information and documents. Some of the common errors and how to avoid them are listed below.

Banking Information

Banking information **must** be provided on the supplier self-registration form **and** one of [UBC's stand-alone forms](#) for EFT/ACH/GDS (cross-border form) **must be attached** to the direct deposit request. For EFT or ACH setup, a **physical voided cheque** must also be attached to the EFT or ACH form. Refer to the [UBC Finance website](#) for banking information requirements and supporting documents.

Address

Do not overwrite the existing address with a new address. This can cause system errors. **Add the new address** and specify whether the new address is the primary address or not.

Canadian addresses should be verified in [Canada Post's database](#) to ensure the payment will be delivered to the correct address by Canada Post.

Payment Terms

Do not change the payment terms. UBC standard payment terms are [net 30](#).

GST/HST Number

Use the [GST/HST Registry](#) to confirm that the business charging UBC GST/HST is registered. The **business name and GST/HST number must be verified** using the [GST/HST Registry](#).

Business Type

Identify the business type by indicating whether the supplier is an **individual/sole proprietor or a business/organization**. This information is required to ensure appropriate tax forms are issued by UBC.

Payments to Students

Student Awards

Awards are paid via an integration between SIS and Workday. Administration of awards should be coordinated with [Enrolment Services](#) and the [Faculty of Graduate and Postdoctoral Studies](#) to ensure payments are made to the student's account and appropriate tax forms are issued.

Student Expense Reimbursements

UBC employees must [set up students as external committee members in Workday](#) and reimburse them for out-of-pocket expenses by [creating an expense report in Workday](#).

Other Payments to Students

Refer to the [supplier invoicing process](#) if a student provides services to UBC or a student invoices UBC in the capacity of a supplier.