

EXISTING SUPPLIER CHANGES WALKTHROUGH

If you are an individual that used your social security number as your Tax ID (TIN), please include the following document:

- Supplier Tax Information Form

If you are a business that used an Employee Identification Number (EIN) as your TIN, please include the following document:

- W9

YOU CAN FIND ALL THE REQUIRED PAPERWORK ON THE HOMEPAGE OF THE SUPPLIER PORTAL WEBSITE. PLEASE SCROLL DOWN TO "REQUIRED SUPPLIER INFORMATION" AND DOWNLOAD ALL THE NEEDED DOCUMENTS.

INTERNATIONAL SUPPLIERS

All international suppliers must be sent to Tax Services for approval before being able to process changes/updates. Please send the appropriate W8 to the UF department you are doing business with so they can forward it to Tax Services at payroll-services@ufl.edu. Once Tax Services has reviewed and approved your request, they will forward to the supplier maintenance team to update your file in the supplier system.

SUPPLIER PORTAL

The University of Florida welcomes suppliers interested in doing business with the university. We strive for an open and competitive process with our suppliers in order to foster a mutually beneficial relationship.

SUPPLIER PORTALS

New Supplier

Existing Supplier Changes

Instruction Guide for the Registration Process

Please have all forms ready. Please note, there is no "save for later" function in the existing supplier changes portal.

After retrieving needed documents, click on "Existing Supplier Changes"

The screenshot shows the Supplier Portal interface. At the top, there are navigation tabs: Welcome, Company Profile, Addresses, Contacts, Payment Profile, and Submit. Below these are buttons for Exit, Save for Later, Previous, and Next. The main content area displays "Welcome Supplier Portal Guest Account (UF Supplier)". A red box highlights the text: "Only use this portal if you already have an existing supplier file with the University of Florida. If you do not have a supplier file, go back to the portal home page, and select 'New Supplier'." Below this, there is a paragraph: "In this portal, you can make changes to your existing information. Before you begin please have the [Supplier Tax Information form](#) filled out as you will be required to attach a copy on the next page." Another paragraph states: "You only need to make the changes necessary. You do not have to re-enter any fields or forms that need no changes." A form field for "Taxpayer Identification Number" is shown, with a red box around it and a callout: "This will be your SSN or EIN depending on which you used to create your supplier file." At the bottom right, there are buttons for Exit, Save for Later, Previous, and Next, with a red box around the Next button and a "Review Changes" link.

Company Profile for UF Supplier

[Review Changes](#)

Please make sure to enter a Supplier Name and Attach the Supplier Tax Information Form under the Profile Question section.

Unique ID & Company Profile

*Supplier Name

TYPE THE NAME YOUR SUPPLIER FILE WAS CREATED UNDER

Doing Business As (if applicable)

LEAVE BLANK IF YOU DO NOT HAVE A DBA NAME

[Expand All](#) [Collapse All](#)

UNSPSC Codes

Profile Questions

*Supplier Tax Information Form

Attachments (0)

[Add/View Attachments](#)

Attach your Supplier Tax Information form or W9 here.

Provide the department and the department contact you are working with

Enter the email address of the UF department contact you are doing business with.

Email or fax number where purchase orders should be sent

Enter your email or fax number.

Business Classification or Designation (If Applicable)

[Select](#)

Certification Source (If Applicable)

[Select](#)

*Certification Document (Required if Certification Source is selected)

Attachments (0)

[Add/View Attachments](#)

*General Liability Insurance Document (Required ONLY if working on UF property.)

Attachments (0)

[Add/View Attachments](#)

General Liability Insurance Expiration Date

*Workers' Compensation Insurance Document (Required ONLY if working on UF property.)

Attachments (0)

[Add/View Attachments](#)

Workers' Compensation Insurance Expiration Date

*Vehicle Insurance Document (Required ONLY if working on UF property.)

Attachments (0)

[Add/View Attachments](#)

Vehicle Insurance Expiration Date

If you have any certifications to attach, please do so here. Otherwise, please skip this section and process with the request.

Comments

[Review Changes](#)

Welcome Company Profile **Addresses** Contacts Payment Profile Submit

Addresses for UF Supplier [Review Changes](#)

Description	Address Line 1	Change Action	Change Effective Date
Add New Address			04/11/2023

[Review Changes](#)

If you need to update an address(es), click on "Add New Address", and fill out the address page

Address Information

Description

Address Type ▼ Select address type (Ordering, Primary, Remit, Sales) by click the drop-down arrow.

Country

Address 1

Address 2

Address 3

City

Postal

State

Email ID

Phone Information

*Phone Type	Location	Prefix	Telephone	Extension
<input type="text" value="Business Phone"/> ▼	<input type="text"/>	<input type="text"/>	<input type="text" value="ENTER PHONE NUMBER"/>	<input type="text"/>

Instructions (add, correct, remove, update?)

EXAMPLES:

1. "Please replace current purchasing address with new purchasing address."
2. "Please update address 1 with address provided in this request."

Changes Take Effect: Current Date Future Date

Navigation: Welcome, Company Profile, **Addresses**, Contacts, Payment Profile, Submit

Buttons: Exit, Save for Later, < Previous, Next >

Addresses for UF Supplier

[Review Changes](#)

Description	Address Line 1	Change Action	Change Effective Date
			04/11/2023

[Add New Address](#)

After clicking OK, you'll be brought back to this screen. Click "Next"

[Review Changes](#)

Buttons: Exit, Save for Later, < Previous, **Next >**

Navigation: Welcome, Company Profile, Addresses, **Contacts**, Payment Profile, Submit

Buttons: Exit, Save for Later, < Previous, Next >

Contacts for UF Supplier

[Review Changes](#)

Name	Address	Change Action	Change Effective Date
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[Add New Contact](#)

Have a new contact (e.g., account manager) you need to add or replace? Click on "Add New Contact" and add necessary information.

[Review Changes](#)

Buttons: Exit, Save for Later, < Previous, **Next >**


Navigation: Welcome, Company Profile, Addresses, Contacts, **Payment Profile**, Submit

Buttons: Exit, Save for Later, < Previous, Next >

Payment Profile for UF Supplier

[Review Changes](#)

To update your Banking information please click on the pencil icon and then the Add Bank Account button.

Location	Description	Action	Change Effective Date	Default	Edit
001	001 - Main Location				

[Add New Location](#)

To update your banking information, click on the pencil under "Edit".

*Required Field

[Review Changes](#)

Buttons: Exit, Save for Later, < Previous, Next >

Payment Profile

Payment Profile for

Payment Profile for 001 - Main Location

[Expand All](#) [Collapse All](#)

Be sure to attach one of the required backup documents listed below.

▼ Attachments

***Please note that in order to add your Direct Deposit information we must have one of the following forms of account verification:

1. A voided check which confirms the account/routing number you have provided.No starter or counter checks accepted.
2. A copy of the bank statement that lists and confirms the account #, Bank name and account holder's name. All balances and transactions should be redacted.

Attach below

Attachments

▼ Bank Accounts

Default	Beneficiary Bank	Bank ID Number	Branch Name	Branch ID	Bank Account #
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[Add Bank Account](#)

Next, click "Add Bank Account to add your new or updated banking information.

OK

Cancel

Add New Supplier Bank Account

Bank Accounts

In this screen, you'll be able to add/update your ACH information

Description

Country United States

Bank Name

Select account type by clicking the drop-down arrow.

Bank ID Qualifier United States Bank

Account Type

Bank Routing Number

Bank Account Number

[Unmask](#)

Instructions (add, correct, remove, update?)

Add instructions here such as "add", "correct", or "update".

[OK](#)

[Cancel](#)

[Welcome](#)
[Company Profile](#)
[Addresses](#)
[Contacts](#)
[Payment Profile](#)
[Submit](#)

[Exit](#)
[Save for Later](#)
[◀ Previous](#)
[Next ▶](#)

Payment Profile for UF Supplier

[Review Changes](#)

To update your Banking information please click on the pencil icon and then the Add Bank Account button.

Location	Description	Action	Change Effective Date	Default	Edit
001	001 - Main Location				

[Add New Location](#)

*Required Field

[Review Changes](#)

[Exit](#)
[Save for Later](#)
[◀ Previous](#)
[Next ▶](#)

When you click "OK", you'll be brought back to this screen. Click "Next" to continue.

Next ▶

[Welcome](#)
[Company Profile](#)
[Addresses](#)
[Contacts](#)
[Payment Profile](#)
[Submit](#)

[Exit](#)
[Save for Later](#)
[◀ Previous](#)
[Next ▶](#)

Review and Submit Changes for UF Supplier

Use the "Review" button to review changed information.
Use the "Submit" button to submit your change request.

Email communication regarding this request will be sent to:

Confirm Changes

[Review](#)
[Withdraw](#)
[Submit](#)

[Review Changes](#)

[Exit](#)
[Save for Later](#)
[◀ Previous](#)
[Next ▶](#)

Review your submission if necessary. Otherwise, enter your email address and then check "Confirm Changes".

Your Existing Supplier Change request will be sent to the Disbursement Services Department for review and approval. If any additional information is required, you will be contacted.

Check "Confirm Changes" and click "Submit".

Next ▶