

# Vendor Maintenance Update

## Is your vendor closed for ordering and other common Vendor Maintenance Questions

In an effort to aggregate and better leverage spending, Central Purchasing, along with the Office of Sponsored Programs and Accounts Payable have implemented a process to help reduce the number of University Suppliers. This process will help the University realize efficiencies without compromising quality.

### Here are answers to some frequently asked questions:

**Q:** Do you have questions regarding the new [Vendor Setup Form](#)? (Formerly AP Payment Compliance and Vendor Profile forms)

- Q: Who created this form and why?
- A: The form was a collaboration between University Purchasing, Accounts Payable, Office of Sponsored Projects Purchasing and Accounts Payable, and The Ohio State University Wexner Medical Center. All three business units will utilize the form.
- Q: What if I do not understand something on the form?
- A: This form is to be filled out by the Individual or Supplier you are working with; they can direct their questions to the appropriate Vendor Maintenance business unit. ([Contacts](#))
- Q: Do I have to have my Individual/Supplier check the Vendor Interaction Policy?
- A: This policy pertains to OSUWMC only, at this time. If you have questions related to this policy, please contact OSUWMC [Vendor Maintenance](#).

**Q:** Do you have questions regarding which forms are required to submit an online Vendor Maintenance form?

**A:** See the [Vendor Maintenance University Instructions](#)

**Q:** If a vendor is "Approved" but not marked "Open for ordering" what is my next step?

**A:** Do you want to create a voucher through PREP for payment?

If a vendor is "Approved" but not checked "open for ordering" you can still create a voucher through the PREP system (no additional steps are necessary).

**A:** Do you want to create a REQ or PO?

Your vendor must be "open for ordering". You will need to submit a request to "Reactivate/Re-Open" your vendor on the [Online Vendor Maintenance Request form](#)

**Q:** What is the difference between Approved and Inactive?

**A:** An "approved" vendor can still create a voucher for payment (see above) but will not allow for the creation of a REQ or PO.

**Q:** I have invoices coming in for payment, but my vendor is closed. What do I do?

**A:** PO's issued with a vendor ID# marked "Not Open for Ordering" will have no effect on payment activity. You can make changes to the existing PO, but please remember to close the PO when complete.

**Q:** I need to do a change order to my open PO and my vendor is not available. Can I still do a Change order?

**A:** If the PO was created by a Delegated Buyer, there is no change to the process;

If the PO was created by Central Purchasing, submit a requisition without the Vendor ID (Vendor is blank), but provide all necessary information for the change. Please remember to close the PO when complete.

**Q:** My PO is fully expensed, what do I do?

**A:** Contact [Expediting team](#) or [Purchasing](#) to determine if the [PO Closure](#) or change order process should be used.

**Q:** Should I create a REQ if my vendor ID is closed?

**A:** No. Use an eStores supplier or contact Purchasing for an established supplier ([Category Buyer listing](#))

**Q:** There is a new contract for my specific Category, what do I do with my current PO on the old contract?

**A:** Your department should be utilizing current contracts. Finalize invoices and close your PO.

**Q:** I have a Vendor addition for a specific category, who do I call?

**A:** [VM Contacts](#); or see [Category Buyer listing](#); Purchasing will review your request and make a determination on a case by case basis.

**Q:** Can I Re-Open my "Closed for Ordering" vendor?

**A:** Contact Purchasing to discuss before submitting your request ([VM Contacts](#); or see [Category Buyer listing](#)). Certain vendors were closed because they have met specific criteria. Determine the following before submitting a request to Reactivate/Reopen a vendor:

- Can a pCard be used?
- Can an "approved/open for ordering" supplier provide the same goods/service?
- Have I talked to a Senior Buyer or Sourcing Leader in [Purchasing](#)?

**Q:** I have spoken with someone in Central Purchasing; it was determined that my vendor should be Re-Opened for ordering (see question above)- how do I proceed?

**A:** Submit an online Vendor Maintenance Request form to "Reactivate/Re-Open" once you have acquired the appropriate [forms](#).

**Q:** Do I need to provide the Vendor Setup Form for a vendor that has been determined appropriate to Reactivate or Re-Open (see question above) when the "W9 Form Scanned" box is checked?

**A:**

The screenshot shows a web-based form for Vendor Maintenance. At the top, there are tabs for 'Identifying Information', 'Address', 'Location', 'Contacts', '1099', and 'Vendor History'. Below the tabs, the 'SetID' is 'UNIV' and the 'Vendor' is '0000157690'. The 'Vendor Name' section includes fields for 'Name 1' (OHIO STATE UNIV), 'Name 2', and '\*ShortName' (316025986 and 316025986-198). There are checkboxes for 'Requested' (Federal Tax ID, Special Interest, Ohio Based Supplier, Freight Management). The 'Vendor Classification' section has dropdowns for 'Classification' (Supplier) and 'HR Class', and checkboxes for 'Status' (Approved), 'Persistence' (Regular), 'VAT Registration', 'Withholding', and 'Open For Ordering'. The 'Vendor Relationships' section has checkboxes for 'Corporate Vendor' and 'InterUnit Vendor', and a checked checkbox for 'W9 Form Scanned' which is circled in yellow.

Please contact someone on the [Vendor Maintenance Team](#) to determine if appropriate documents are on file. Even if the box is check-marked, it does not guarantee that current and complete documentation is on file. Only Vendor Maintenance staff is able to access this content.

**Q:** Can I upload the Vendor Setup Form to my eRequest?

**A:** Due to the confidentiality of the information contained in the documents we recommend that you do not upload to eRequest. The online Vendor Maintenance request form has layers of security built in to encrypt and protect your uploaded documents.

**Q:** I am unable to attach my .pdf to the Online Vendor Maintenance Form, what is the problem?

**A:** The Online Vendor Maintenance form is only supported by Microsoft Internet Explorer (IE). Attachments must not exceed 2MB. (Need to [reduce the size of your document](#)?)

**Q:** Can I use a pCard?

**A:** Please utilize the decision tree to determine the preferred procurement method. (By order of Internal Supplier, eStores, PCard, Convenience Order, Purchase Order)

**Q:** I was told my Vendor request was not a "TIN Match" with the IRS. What does this mean?

**A:** The University now complies with TIN matching all vendors that are created, Reactivated or Re-Opened. This process is completed by the Vendor Maintenance team prior to performing maintenance in Peoplesoft. The vendors Tax Identification Number (TIN) needs to match the name with IRS files. Click [here](#) for additional information from the IRS.

**Q:** How long does my online Vendor Maintenance request take to process?

**A:** The length of time for processing depends on many variables. It is important to submit your online request only once you have all required paperwork, with all the procurement questions answered. This will reduce the amount of back-and-forth emails, communication and requests being put on hold.



THE OHIO STATE UNIVERSITY

Purchasing Department  
Office of Business and Finance

## VM Process Time/Wait Time



### Simple Vendor Request (20% of requests)

All required forms are completed, signed and attached; all questions are answered on online form; vendor has been searched thoroughly in PeopleSoft; vendor TIN matches with IRS

- Processing Time = 15 – 20 min

### Complex Vendor Request (60% of requests)

Some forms received; possible TIN match; follow up with vendor due to tax classification error/confusion; multiple follow up with department/supplier and/or Commodity Manager

- Processing Time = 30 - 35 min
- Wait Time = 1 to 3 days

### Extremely Difficult Vendor Request (20% of requests)

Some forms received; issue with TIN match; discussion with Accounts Payable; multiple follow up with department/supplier and/or Commodity Manager

- Processing Time = 2 – 3 hrs.
- Wait Time = 2+ weeks

**Q:** How do I access a listing of open POs for my departments?

**A:** Visit [eReports](#) -Run the Purchase Order Report (POB101DW) to review the list of outstanding purchase orders with summary and detail information.

**Q:** I still have questions, who can I talk to?

**A:** [VM Contacts](#); [Category Buyer listing](#); [Purchasing Contacts](#)

\*\*Please remember to review your open POs and close when complete!