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Purpose

To provide an on-line registration process for Catholic University community.

Please <u>use this system</u> to register if you belong to one of the following categories

- Employees, students and other individuals to receive reimbursements.
- New Suppliers who are billing the University for goods or services

Requesting access to the PeopleSoft Supplier Registration module

- 1) Your CUA point of contact or your manager (for employees/students) must send an email to <u>CUA-AP-VENDORS@cua.edu</u> for adding you as a vendor.
 - a) The email must include the Company Name, Contact Name and Contact Email of the entity that needs to register as a vendor.
 - b) The email will be considered as an approval from the CUA point of Contact or the manager for registration.
- 2) Supplier Relationship Manager (SRM) will send an email invitation for registration to the vendor/employee/student.
- 3) Once the registration is completed, the SRM will approve/ request for more information or deny the request based on the provided information.

Instructions to register:

- A. Step 1 Welcome
 - a. Please read the welcome section prior to proceeding.



Welcome	Identifying Information	Addresses	Contacts	Payment Information	Submit
Welcome - Step 1	of 6			Exit 🧃 Pr	evious Next 👂
To complete your re between steps or "S you may submit you	gistration, please fill in the inform ave for Later" to save your work to r registration for consideration. You	nation for each step of t be resumed later. Once I will receive an email co	he registration process. U you have provided all the onfirmation shortly after sub	se the navigation buttons "Next" an required information, proceed to the mitting.	d "Previous" to move e "Submit" step where
For additional inform	nation or help hover over the icons of	containing a question ma	ark symbol for details.		
You may send an en	nail to: CUA-AP-VENDORS@cua.e	edu			
Select an activity l	pelow: 👔				
Start a new regi What type of ent	stration form lity do you represent?				
Business	5				
Individua	1				
Continue from v	vhere you left				
				Exit « Pr	evious Next 🕨

Select the following options if:

Start a new registration form	You are registering for the first time. This will be the default selection
Business	You represent a business, partnership, corporation
Individual	You are a sole proprietor, consultant, employee, student
Continue from where you left	You have a saved or partially completed form OR, you have been asked to resubmit due to partial or incomplete information
b. Click on the Next form.	Exit Previous Next to move forward to the next step of the

B. Step 2 –Identifying Information

a. Enter the Tax Identification Number (Business) or Social Security Number (Individual)



Note: should be all numeric, no hyphens (-)

- b. Entity Name
- c. The Classification should be Outside Party (All Others) if you represent a vendor.
- d. Respond to remaining questions 1 to 7. All questions marked by an asterisk (*) must be answered in order to move forward to the next section of the registration.

Question #1 (Optional) – Operating name of the company.
Question #2 (Optional) – Number of Employees in the company.
Question #3 (Optional) – Classification when it comes to federal taxes.
Question #4 (Optional) – Type of business classification. If your classification is not listed here, then please refer to the Additional Reporting Element section and select the applicable category.
Question #5 (Required) – DMV based classification (If you are a vendor in DC, Maryland and Virginia area. Select "Not Applicable" if it does not apply to you.
Question #6 (Optional) – Attach Certification(s) [Relevant to DMV based classification]
Question #7 (Required) – Select the type of services provided. Select "Not Applicable" if you are an employee or a student.

- e. Additional Reporting Elements Select the applicable category
- f. Click on Next Exit Save for Later Previous Next o move to the next section of the registration.

C. Step 3 - Addresses



a. Enter the vendor's primary address.

- b. The primary address should consist of at least: Country, Address 1, City, State, Postal Code or Zip and Email ID.
- c. Other Addresses Check the box and enter the **Remit To Address** if it is different than the primary address.

	iouto addi oddoo that o	are unterent from you	i i ilinay Address above.		
Remit To Address					
Address for remitting pa	yment				
* Country US	A Q United States				
Address 1					
Address 2					
Address 3					
Address 5					
Address 4:					
City					
County		Postal			
State	Q				
Email ID					

section of registration.

D. Step 4 – Contacts

a. All businesses must provide at least three contacts: Your Company's primary and billing contact and your CUA point of contact. Same contact can be listed twice if the primary and billing contact is the same.

Individual vendors and attorneys must provide at least two contacts: Your Company's primary contact and your CUA point of contact.

Employees and students must provide their CUA contact information.



Contacts - Step 4 of 6	Add Contacts	Lizot -	×
	Contact Information	(2)	
All businesses and individuals except employees must provide at least three contacts, your company's primary and billing contact and your Saving your progress by clicking the "Save for Later" button is encouraged.	* First Name	John	Primary Contact
Company Contacts (2)	* Last Name	Doe	
You have not added any contact information to your application. Click "Add Contact" button to add new contact information	Title		
Add Contact	* Email ID	john.doe@gmail.com	
	* Telephone	7891111111	Ext
	Fax Number		
Exit	Contact Type	Accounts Payable	T
* Required field			
	ОК С	Cancel	

b. If you are a business and you click on Next button without adding all three contacts, an error message will appear. Make sure that all three contact types are added. This information is required for any future communications and issues that might occur.



- c. NOTE: If you are an employee or a student of the University, then you only need to fill in your details and select **Contact Type** as "CUA Contact"
- d. Click on Next Exit Save for Later Previous Next to move to the next section of registration.

E. Step 5 – Payment Information

a. Select the preferred Payment Method from one of the following options:





- i. ACH Automated Clearing House
- ii. System Check for checks
- iii. Virtual Credit Card if you would like to enroll in the Virtual Credit Card program with our Banking Partner, Wells Fargo
- b. Add attachments, if any
- c. Additional ID Numbers:
 - i. Employee must select **Employee ID Number** from the dropdown and enter their EID.
- d. Click on Next Exit Save for Later Previous Next to move to the next section of registration.
- F. Step 6 Submit
 - a. Before submitting the registration request, you must
 - i. Verify the email address for future communications.
 - ii. Review the Terms of Agreement To review the Terms of Agreement, click on **"Terms of Agreement"** Link.

0		
Submit - Step 6 of 6	Exit Save for Later A Previous	Next 👂
Review and confirm your changes before submitting. Saving your progress by clicking the "Save for Later" button is encouraged.		
Click the "Review" button to review the registration information.		
Click the "Submit" button to submit your registration after reviewing and accepting following	Terms of Agreement .	
Email communication regarding this registration will be sent to:		
• john.doe@gmail.com		
Terms and Conditions (?)		
Make sure you read terms of agreement fully before submitting your registration.		
Click to accept the Terms of Agreement below.		
Terms of Agreement		
Review Submit		
	Evit Saua far Latar Provinue	RT414

- iii. After reading the Terms of Agreement, click Return. Check the box indicating that you "Accept the Terms of Agreement".
- b. Submit button will be enabled once the check box is clicked.



c. Click on Submit button to submit the registration.

Supplier Registration Approval and Next steps

A. Registration Completion

a. Upon successful submission, the vendor will receive the following message.



B. Registration More Information Needed

a. Supplier Relationship Manager will review your request for approval. If more information is needed then you will receive an email to edit your application to provide additional information.



b. Click on the link shared in the email, select **"Continue from where you left"**, and provide your registration and tax id.

Welcome - Step 1 of 6		Exit
To complete your registration, please fill i between steps or "Save for Later" to save y you may submit your registration for consid	n the information for each step of the registratio our work to be resumed later. Once you have pre eration. You will receive an email confirmation sh	in process. Use the navigation buttons "Next" and "Previous" to move ovided all the required information, proceed to the "Submit" step where ortly after submitting.
For additional information or help hover over	r the icons containing a question mark symbol fo	r details.
You may send an email to: CUA-AP-VEND	DRS@cua.edu	
Select an activity below: (?)		
 Start a new registration form Continue from where you left 		
* Registration ID		
Forgot your registration ID?		
* Required field		Exit

c. Your details should be prefilled based upon your previous submissions. Fill in the requested details and submit the application again.

C. Registration Approval

THE CATHOLIC UNIVERSITY OF AMERICA

a. You will receive the following email once the application is approved.

noreply@cua.edu	Wed, Sep 11, 11:29 AM (5 days ago)	☆	*	:
The Catholic University of America has approved your supplier registration application ID				
Supplier Name: Supplier ID:				
PLEASE NOTE:				
If your preferred Payment Method in the application is ACH (Automated Clearing House) or Credit Card, please register you	ur banking information with CUA Bank p	artner, W	/ells Fa	argo.
You will receive an email from <u>achonboarding@wellsfargo.com</u> for enrollment request within next 24 to 72 hours. This is the Catholic University. Payments WILL NOT be processed until you complete this step of registration.	e final step for registration to start receiv	ng payn	nents f	rom
If your preferred Payment Method in the application is CHK, your registration process is complete.				
If you have any questions or feedback, please email the Supplier Relationship Manager at CUA-AP-VENDORS@cua.edu.				
Thank you, Procurement and Payment Services, The Catholic University of America				

If you preferred Payment Method is:

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CHECK - Your approval process is completed and you can begin to provide Services.

ACH or Virtual Card - You will need to register your banking information at our banking partner, Wells Fargo. You will receive an email from achonboarding@wellsfargo.com for enrollment within the next 24 to 72 hours. Once registered successfully at Wells Fargo, you can begin to provide Services.

Please contact <u>CUA-AP-VENDORS@cua.edu</u> if you have any suggestions and feedback for the manual as well as the registration process.