Overview

UCR recently updated our campus financial system. To improve the security and confidentiality of individuals and others receivin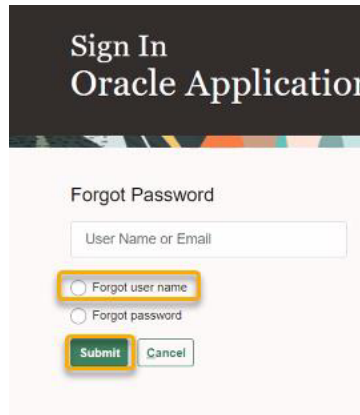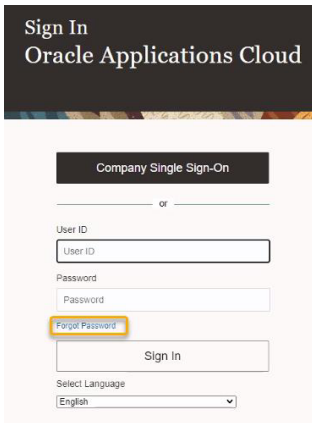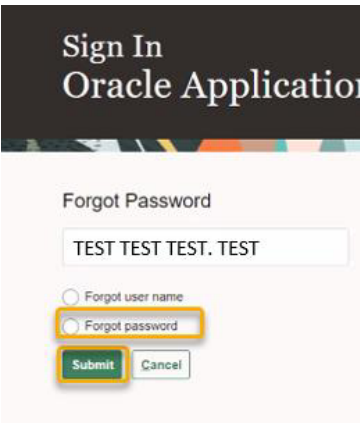g payment from UCR (i.e., payees), payees are asked to securely provide the information required to issue a payment. This guide offers detailed instructions on how to create and manage profile information for a payee that is not providing procurement-related commodities (also known as a non-purchase order (PO) suppliers) nor employment-related services, such as non-employee payees receiving stipends, refunds, reimbursements, etc. Please keep in mind that all data and values presented in this guide are for training purposes only. When using the guide, for security and confidentiality purposes, payees are asked to update their profile with their personal information in all relevant fields.
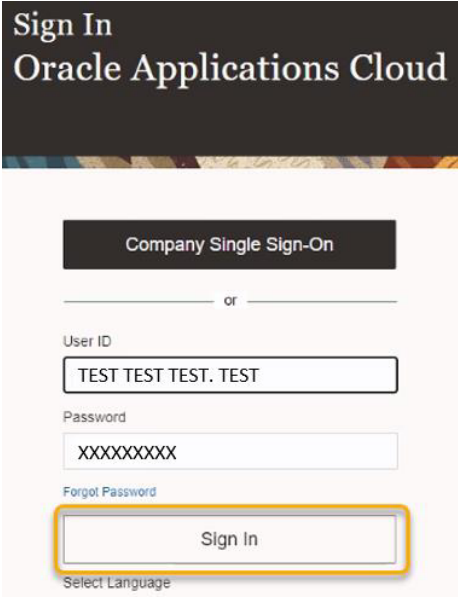
Steps to Take

Topic 1: How to access the Oracle Supplier Portal

This process outlines the steps required for a user that is not part of the UCR organization to log in to Oracle. When a UCR campus department needs to initiate a payment to you, they will request your email contact information and initiate a request to UCR's Accounting Office. Next, an email will be sent from UC Riverside to you, the Payee. From there, several subsequent steps need to be completed to create a user account and password to successfully access the Oracle system and update your payee information.
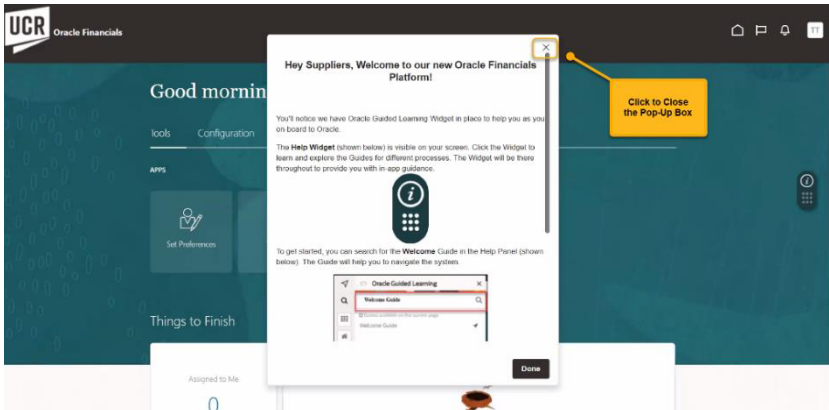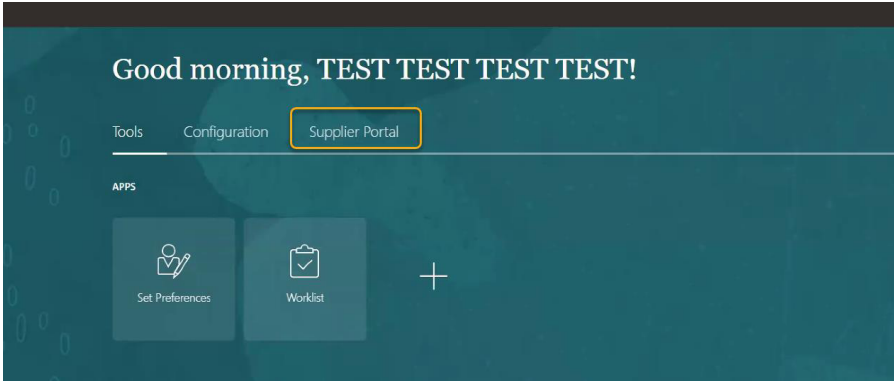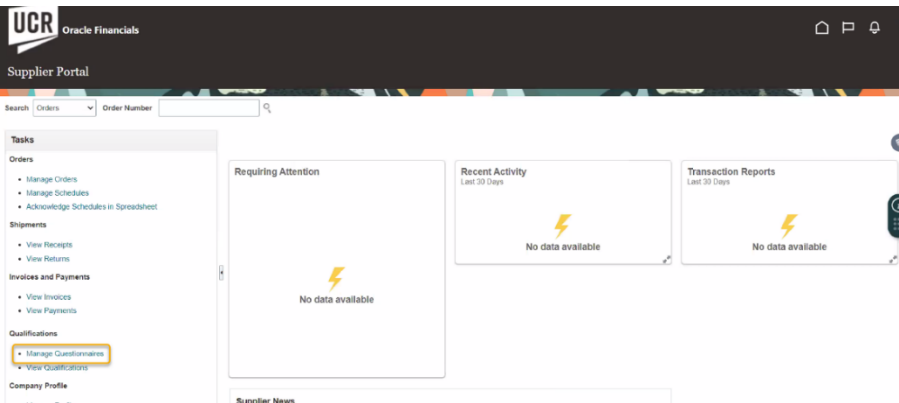
Steps	Action
1.	To register as a supplier, the proposed payee (you) will be sent an email invitation with the subject "FYI: Supplier Contact User Account for UCR Enterprise was Created." Please open this email and click on the **Access the application** link provided within. This will guide you through the registration process. From: evbz.fa.sender@workflow.mail.us2.cloud.oracle.com <evbz.fa.sender@workflow.mail.us2.cloud.oracle.com> Sent: Friday, July 21, 2023 10:43 AM To: Subject: FYI: Supplier Contact User Account for UCR Enterprise was Created **Supplier Contact User Account for UCR Enterprise was Created** Details Assignee TEST TEST TEST TEST Supplier TEST TEST TEST Assigned Date 07/21/2023 10:43 AM Supplier Number 2000001075 Expiration Date 08/20/2023 10:43 AM Task Number 249155 Recommended Actions You were granted access to the supplier application for UCR Enterprise. A separate email will be sent to you with the instruction to access the application. Access the application User Account Details

| 2.	You will be directed to the Oracle application: • Click the **Forgot Password** link • Click **Forgot user name,** then **Submit**	
3.	You will soon receive an email containing your Oracle User ID. For instance, this supplier's User Name is "**TEST TEST TEST. TEST**" (Please omit the last period at the end). Your User ID might resemble something like "JOHN.SMITH". evbz.fa.sender@workflow.mail.us2.cloud.oracle.com To: You Fri 7/21/2023 11:02 AM Dear TEST TEST TEST TEST, You had requested your user name from Oracle Fusion Applications Self Service Portal. Your User Name is TEST TEST TEST.TEST. If you did not request this information or have any questions, contact your system administrator. Thank You, Oracle Fusion Applications	
4.	In the Oracle application: • Click the **Forgot Password** link • Enter your **User Name** • Click **Forgot password,** then **Submit**	

5.	An email will be sent to you to initiate the password reset process. Please click the link provided in
	
	From: evbz.fa.sender@workflow.mail.us2.cloud.oracle.com <evbz.fa.sender@workflow.mail.us2.cloud.oracle.com>
	Sent: Friday, July 21, 2023 10:51 AM
	To:
	Subject: Oracle Fusion Applications-Password Reset Information
	
	Dear TEST TEST TEST TEST,
	
	    You have requested to reset your password for Oracle Fusion Applications through Self Service Portal.
	
	    Please follow the link below to reset your password.
	
	    https://fa-evbz-saasfaprod1.fa.ocs.oraclecloud.com:443/hcmUI/faces/ResetPassword?ase.gid=052d3bfa94324257be1833d2618782da
	
	    If you did not request this information or have any question, contact your system administrator.
	
	Thank You,
	Oracle Fusion Applications
	
	the email to proceed with resetting your password.

6.	You are all set to access the Oracle Supplier Portal. Just enter your **User ID** and **Password**, and then click on **Sign In**. For future logins, be sure to save your User ID and Password in a secure location.

**Topic 2: How to register as a Supplier in Oracle**

By following these instructions, you will be able to navigate through the portal and address the questionnaire accurately and efficiently.

Steps	Action
1.	To close the pop-up box in Oracle, simply click the "X" button. Please note that this guidance is not applicable to individuals/payees. It may be necessary to close the pop-up on multiple screens before it is entirely disabled.
2.	Click **Supplier Portal.**
3.	Under Qualifications, click **Manage Questionnaires.**

4.	Click the **Respond** button.
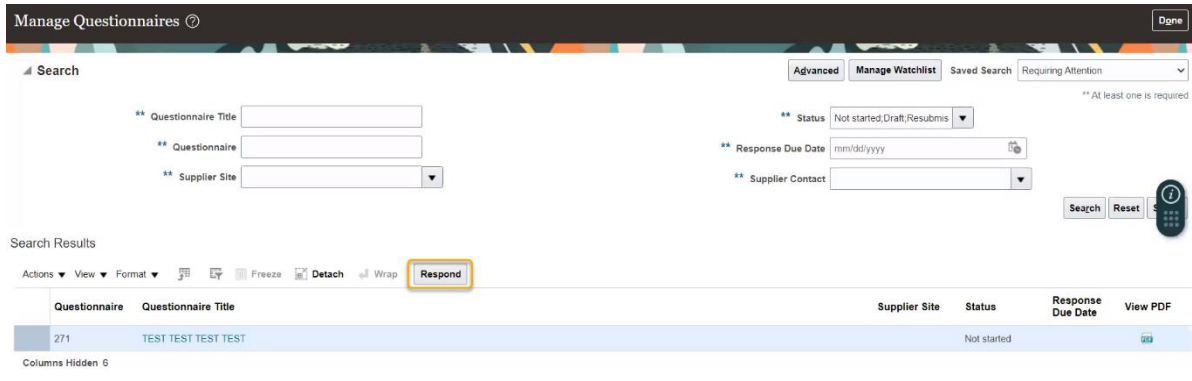
| 5.	Complete the questions in the **UCR Supplier Onboarding Questionnaire**. Make sure to complete all questions referenced below.
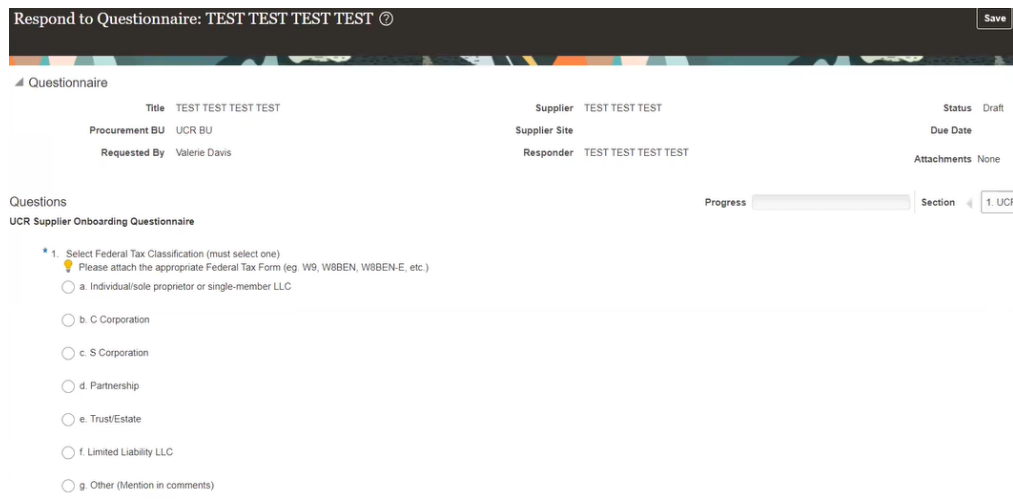
Q1. *Select Federal Tax Classification:* Select your Federal Tax Classification.
You **must** download and complete one of the appropriate Federal Tax Forms:

Form	Select if…
W-9	You are an **individual or entity** who is required to file an information return with the IRS. Provide a taxpayer identification number (TIN), social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN).
W-8BEN	You are a foreign **individual** receiving a payment in the United States.
W-8BEN-E	You are a foreign **entity** receiving payment in the United States.

- Once you have completed the form, click the **None +** button.
- In the pop-up window, click **Actions**, then **Add**, then **Choose File**, upload your completed Federal Tax Form, and click **OK**. Make sure to keep the completed Federal Tax Form as you will be required to upload it later during the registration process.

Q2. *Where do we send payment?:* This is typically your mailing address.
Q3. *Are you a California Resident?:* Select **a. Yes** or **b. No**, and attach the corresponding form.
Q4. *Select your Employee-Supplier Relationship Status.* Select **e. No Relationship**, unless one exists.
Q5. *Please confirm whether all below…:* Select **a. Profile**.

Once you have completed the questionnaire, click on the **Submit** button in the screen's upper right corner. You will receive a confirmation, click **OK**.
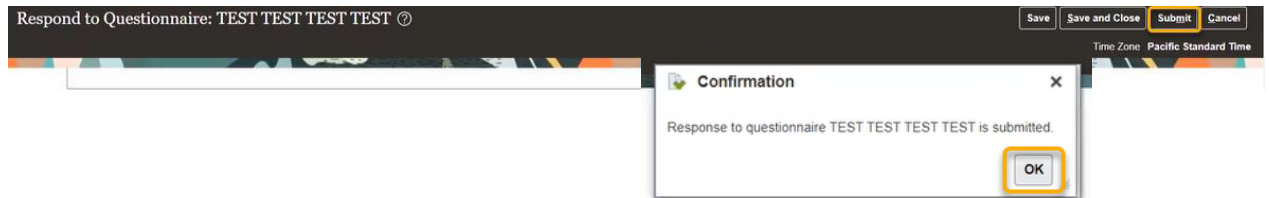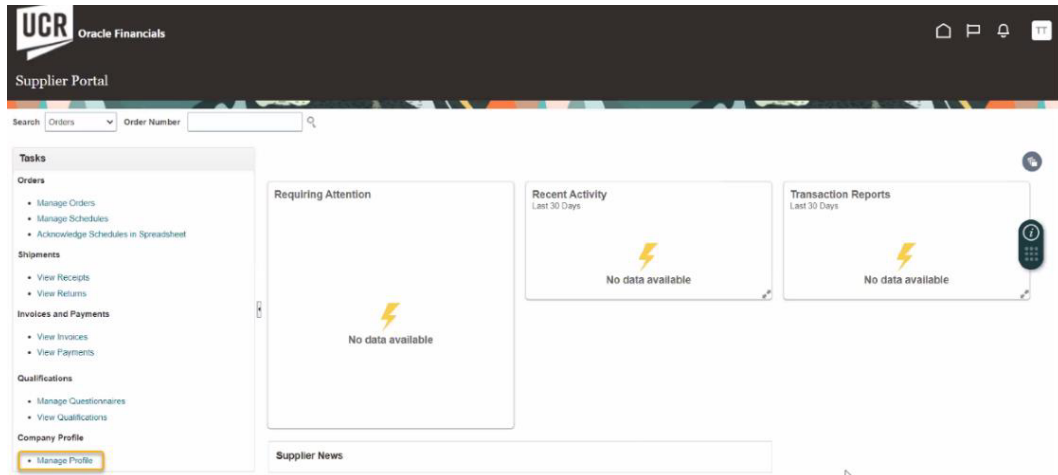

Once your questionnaire has been approved by UC Riverside, you will receive an email inviting you to manage your profile in the Oracle Supplier Portal.

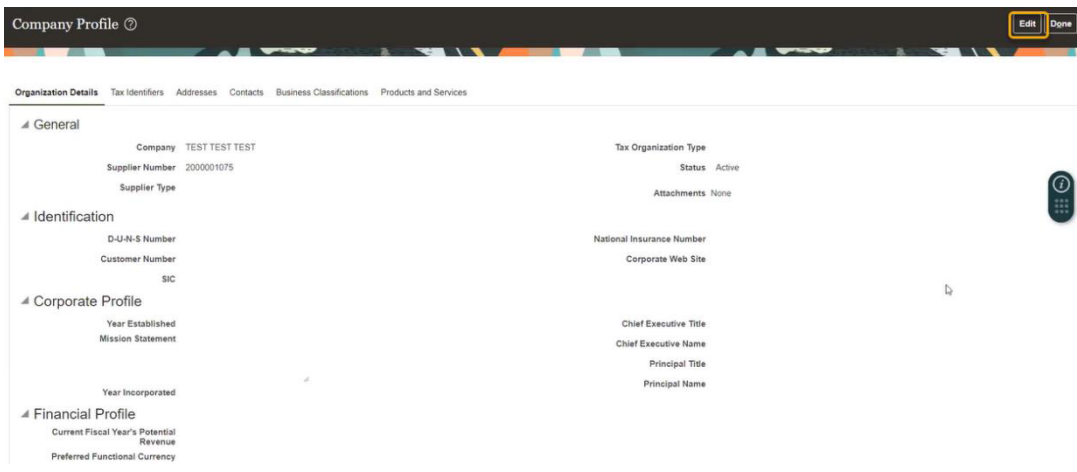## Topic 3: How to manage your profile in the Oracle Supplier Portal
By following these instructions, you will be able to navigate through the portal and update your profile accurately and efficiently.

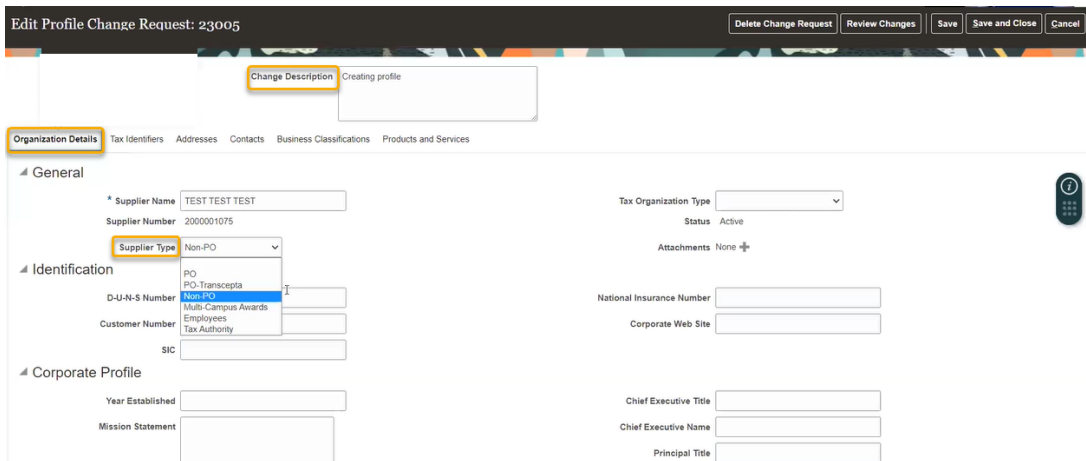| Steps	Action
1.	After logging into Oracle, click **Supplier Portal**.

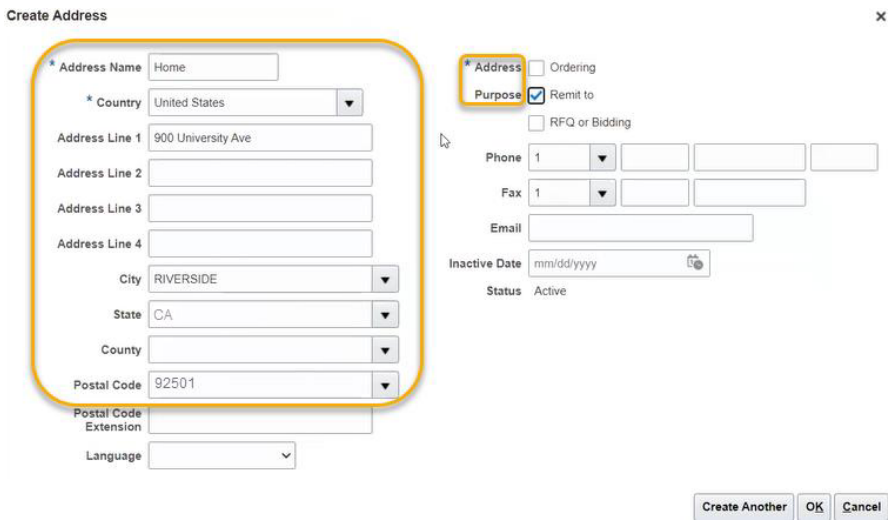| 2.	Under Qualifications, click **Manage Profile.**
3.	Select **Edit** button. Click **Yes** to the Warning pop-up stating "Making edits will create a change….Do you want to continue?"
4.	Enter **Creating profile** in the **Change Description** field. Next, click the **Organization Details** tab and choose **Non PO** as the Supplier Type.

5.	Select **Individual** as the **Tax Organization Type**, and click **None +** to upload your completed Federal Tax Form (e.g., W-9, W-8BEN, etc.).

6.	Click the **Tax Identifiers** tab and complete all fields referenced below.
	• *Taxpayer Country:* **Enter Country.** • *Taxpayer ID:* **Enter your Social Security Number or Federal Tax ID.** • *Federal Reportable:* **Check box.** • *Federal Income Tax Type:* **Enter MISC7 Non-Employee Compensation.** • *State Reportable:* **Check box.**

7.	Click the **Addresses** tab, then the **+ Create** icon, and complete all fields referenced below.

8.	 • *Address Name:* **Enter a name, such as "Home" or "Primary Address"** and add the details. • *Address Purpose:* Check the **Remit to** box. Click the **OK** button once complete.
9.	Click **Save** and select **Review Changes**. (Do not click Save and Close). Next, you will receive the option to click **Submit.** Your UC Riverside profile is now complete!