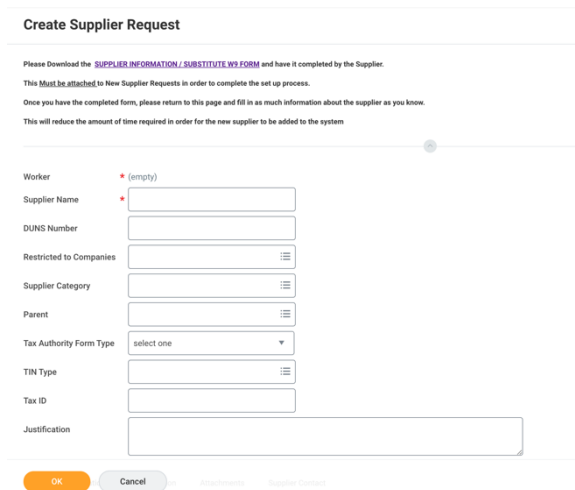


Create Supplier Request

NOTE: Prior to following the steps below, you must download the [Supplier Information/Substitute W9 Form](#) and have it completed by the supplier/payee. **This must be attached to the supplier request in Workday.** Once you have the completed form, follow the process below and fill in as much information about the supplier/payee as you can. This will reduce the amount of time required in order for the new supplier to be added to the system.

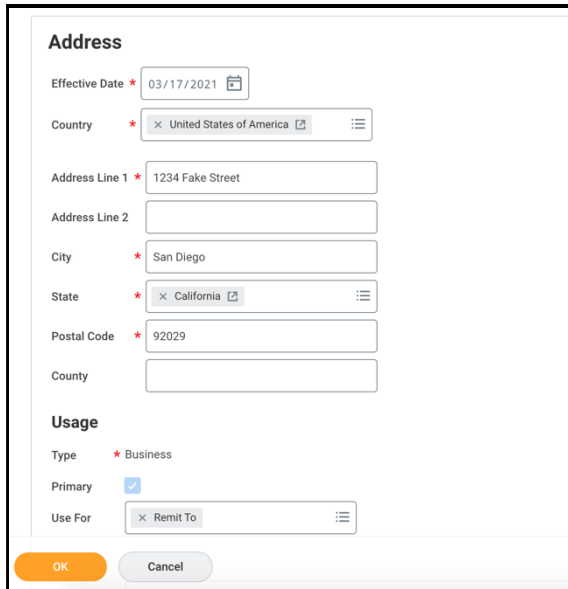
Questions: WorkdayFinance@sandiego.edu

1. Once you have the completed form identified above, click into the Workday search bar, enter **Create Supplier Request** and select this task.



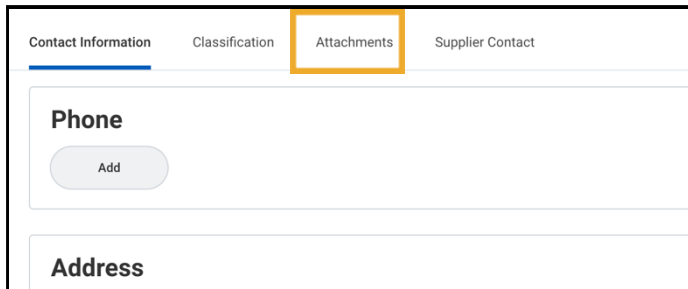
2. Follow the instructions below for filling in the fields on this page:
 - **Supplier Name:** The name of the supplier. **This is required.**
 - **Supplier Category:** Choose the supplier category that matches your supplier.
 - **NOTE:** If requesting a Miscellaneous Payee, select "*MISC Payee*." This will allow it to be available in the Payee Drop-down during "Create Miscellaneous Payment Request."
All other Supplier Categories will allow it to be available in the Supplier Drop-down during "Create Supplier Invoice Request" and "Create Requisition."
 - **TIN Type:** Select the appropriate tax ID type (i.e., EIN or SSN/ITIN). **This is required for US suppliers.**
 - **Tax ID:** Enter the tax ID. **This is required for US suppliers.**
 - **Justification:** Enter a justification for this supplier request. **This is required.**
3. Scroll down to the contact information section. Click the **Add** button for the section you wish to add information to. **Note that an address is required. Make sure to check the Primary checkbox for the address you enter.**

Create Supplier Request



The screenshot shows the 'Address' section of a form. It includes fields for 'Effective Date' (03/17/2021), 'Country' (United States of America), 'Address Line 1' (1234 Fake Street), 'Address Line 2' (empty), 'City' (San Diego), 'State' (California), 'Postal Code' (92029), and 'County' (empty). Below the address fields is the 'Usage' section, which includes 'Type' (Business), 'Primary' (checked), and 'Use For' (Remit To). At the bottom are 'OK' and 'Cancel' buttons.

4. Once you have entered an address, click the **Attachments**



The screenshot shows the 'Attachments' tab selected in the 'Create Supplier Request' form. The tab is highlighted with an orange border. Below the tab are sections for 'Phone' and 'Address', each with an 'Add' button.

5. On this tab, attach the form linked above given to you by the supplier. **This is required.**

6. When you are finished, click **OK**. The request will now be submitted to Purchasing for review. If the approvers need additional information or corrections, they may send it back to your Workday inbox with further instructions.
7. You can view the **My Supplier Requests** to review your request and monitor its current status.

NOTE: Supplier Requests with Supplier Category "*MISC Payee*" the request notification will say **DENIED** but the comment will state that the Payee was created and is now available.