

Penn Marketplace Information Session

June 16, 2020



Agenda

1 Shopping/Browsing/Searching in the Penn Marketplace

2 Supplier Request/Registration

3 Non-PO Payment Request Processes

4 Q & A

5 Resources



Shopping/ Browsing/Searching in the Penn Marketplace

Search Functions in the Penn Marketplace

- **Supplier Search**
 - Use the left hand navigation bar to search for suppliers on the many attribute fields available
- **Document Search**
 - Use the Order Search option when looking for detailed information on Requests, PO's, Invoices, and payment statuses
 - Search functions are also found in Accounts Payable and Supplier Tabs
- **Supplier Request and Registration Status**
 - View the Supplier Request/Registration dashboard for the status of your requests and supplier registration progress
- **Quick Search**
 - To perform a simple search use the top right hand box to enter your information if you have a specific supplier name, PO # or Invoice # for a quick return of information

Shopping/ Browsing/Searching in the Penn Marketplace

How to Resend a PO

- To quickly resend a PO, you can enter the Penn Marketplace and select your PO and resend directly to the supplier. Follow the detailed [instructions](#)

PENN MARKETPLACE
Your Procure-to-Pay Portal

BRIAN 10149957 CAPUTO 4433046

Orders > Search > Purchase Orders > Summary - PO 4433046

1 of 1 Results

PO/Reference No. 4433046 Revision 0
Supplier EMSCO/FISHER

Status: Purchase Order Revisions PO Approvals Shipments Invoices Comments Attachments History

Summary Shipping Information

General Information	Shipping Information	Billing/Payment
PO/Reference No. 4433046 Revision No. 0 Supplier Name EMSCO/FISHER Address 5070 PARKSIDE AVENUE, SUITE 3200 PHILADELPHIA, PA 19131 US Phone +1 267-275-8888 ext. 104 Supplier Fax No. +1 267-275-8883 Purchase Order Date 2/5/2020 Total 10.35 Disquisition Number 110700100	Ship To Attn: CAPUTO, BRIAN SUITE 421A 3401 WALNUT STREET PENN PURCHASING PHILADELPHIA, PA 19104-6228 US US ShipTo Address Code 820 Delivery Options	Bill To ACCTS PAYABLE-UNIV OF PENN ROOM 440 FRANKLIN BUILDING 3451 WALNUT STREET PHILADELPHIA, PA 19104-6281 US US BillTo Address Code AP Billing Options

- We are no longer accepting the Request to resend PO form into PurchasingSupport@upenn.edu.



Shopping/ Browsing/Searching in the Penn Marketplace

Picking up an assigned cart

- When notified via an email notification to pick up an assigned cart, sign into the Penn Marketplace through BEN BUYS as a Requisitioner or PO Manager (not via the link in the email) or via PennKey



Supplier Request and Registration

Use of Proxy Registration

- Proxy Registration is to be used for exceptional cases
 - Foreign suppliers struggling with language
 - High Profile Individuals
 - Foreign Currency requirements
 - Technical barriers
- Click [here](#) for a training video snippet on the use of proxy registration.



Supplier Request and Registration

Supplier Request vs Registration

- An email notification stating Supplier **Request** “Approved” indicates the supplier has been approved to be invited to register on the portal.
 - Service Level – 2 Business Days from submission to approval
- Supplier **Registration** “Approved” email notification indicates the supplier has registered and has been approved in the Penn Marketplace database.
 - Service Level – 2 Business Days from submission to approval upon **supplier completing registration**



Supplier Request and Registration

Supplier Requests

- When selecting “OTHER” in the Supplier Information box question when creating the Non-PO supplier request – please be specific with your description.
- Suppliers offering a Service or Goods are considered PO suppliers.
- DO NOT request a supplier to be created if you know you have used them in the past. Submit a request to SupplierSupport@upenn.edu to reactivate.



Supplier Request and Registration

- **W-9's are not needed for Refunds –**
 - When onboarding a payee into the Penn Marketplace for a refund, bypass the option of uploading the W-9.
 - Examples: Ticket refund, tuition, Penncard refunds



Supplier Request and Registration

- Prior identified Independent Contractors, who do not have the SPE and SPQ in the PENN MARKETPLACE, should submit any updated documentation to SupplierSupport@upenn.edu to append to the supplier profile.



Non-PO Payment Request Process

Invoice Numbering

Following a standard invoice numbering system is best practice and is key to preventing duplicate payments and makes searching for invoices easier.

Invoice Numbering Guidelines:

Entering an Invoice Number

- Only use capital ALPHA and numeric characters, do not use any special characters (e.g., - / . ; * etc.) Do not use spaces, N/A or not applicable is not a valid invoice number.

Utilities Payments

- When paying utility invoices the Invoice number should consist of the account number followed by the 4 digit date MMY. (Example Account 5679 July 2010 Bill should be 56790710) Please ensure that everyone is following this format for all utility payments. **PAY THE CURRENT PORTION**

Guest Travel Reimbursement

- Invoice numbering/dating format- Invoice # = date of beginning the trip, invoice date = date of end of trip (e.g., 070114 and 070714)

Department of Homeland Security

- Use date and individuals' initials
- Will Calls



Non-PO Payment Request Process

Validation errors

Reasons for Validation 1 Error:

- ZZZZ cannot be used with this object code
- Frozen Fund
- BC2 can only be used with this fund
- BC4 can only be used with this fund
- Failed Rule 56- this object code can only be used with grant funds
- 403- if Non-PO payment request is submitted outside of the hours of Mon- Sat 8am-8pm (In Available Actions- click “approve and complete” for this error)

Actions needed:

- Approval Level 1 will receive an email notification of the error
- Approver must take appropriate actions and correct account string
- If Approver approves the request without taking action, the Non-PO payment request will be sent to Validation Error 2 error and AP will need to correct

Quick Reference Guide Attached



Non-PO Payment Request Process

Creating Favorites

- Save any Non-PO Payment Request (in progress or submitted) to your favorites
- Access favorites from the Shop menu on the Jaggaer homepage
- Accounting Codes favorites/defaults can be set up by clicking your name/View My Profile/Default User Settings/Custom Field and Accounting Code Defaults/Code Favorites tab

Non-PO Payment Request Process

Terms

Supplier	Payment Method	Terms	Based on
New	ePayables	10-Days	Invoice Receipt Date
New	ACH/Wire	30-Days	Invoice Receipt Date
New	Check	45-Days	Invoice Receipt Date
Embedded Before Launch and Not Updated in Jaggaer	All*	Existing	Invoice Receipt Date
Embedded Before Launch and Updated in Jaggaer	ePayables	10-Days	Invoice Receipt Date
Embedded Before Launch and Updated in Jaggaer	ACH/Wire	30-Days	Invoice Receipt Date
Embedded Before Launch and Updated in Jaggaer	Check	45-Days	Invoice Receipt Date
Individuals/Individual Contractors/Exceptional Suppliers	All	Immediate	NA

Effective
10/01/19



Non-PO Payment Request Process

Banking

- As suppliers register on the Penn Marketplace portal we encourage the move from check to electronic payment
- Working on getting Paymode vendors switched over to ePayables or ACH

Foreign Currency Payments

- Payments in foreign currency should be submitted via paper PDA-FC to Accounts Payable
- Looking at moving this to the Penn Marketplace
- Foreign Supplier/Payee Quick Reference Guide is available at <https://cms.business-services.upenn.edu/purchasing/images/stories/pdfs/qrg-foreign%20supplier%20handling.pdf>



Non-PO Payment Request Process

Discarding Forms

- Select Documents/My Forms in left hand navigation bar in the Penn Marketplace
- Select/Open
- Request Action/Discard
- Keep a clean work space!



Non-PO Payment Request Process

Description field character limitation

- Use a brief description in the “Description of Payment” field in the Non-PO payment request. The Penn Marketplace has a 2000-character limitation, however there is a 40-character limitation in BEN. The description should be short and describe what the payment is for. The description is what is included on the payment remittance. Wording provided to help prevent this issue.



Non-PO Payment Request Process

Limited Engagement Forms

- Please ensure that you select Limited Engagement and not **Other** when selecting the type of “ Non-PO Payment Supplier Request”
- The Limited Engagement form must be attached to each Non-PO payment request



Non-PO Payment Request Process

Limit the use of Will Call Checks

- Will Calls should not be requested for PO invoices
- Please encourage Individuals to register in Penn Marketplace for ACH payments (Payment terms for Individuals are Immediate)
- Limiting Will Call during COVID-19

Will Calls could be requested for payments that meet the below criteria:

- Conference and Hotel Registrations
- Payments to the Department of Homeland Security
- Study Participants
- Awards
- Honorariums
- Attachments that need to accompany the check



Non-PO Payment Request Process

P2P Compliance & Privacy -

OACP Review Findings/Remediation

- **Non-PO Payment Request Attachments**
 - Certification
 - Update Training
 - Supporting Documentation
 - Guest Travel Support (Accountable Plan)
- **Substitute Approvers**
- **Review PO and Non-PO Approval Levels**
- **UPHS Employee Reimbursements**

Summary

Shopping/Browsing/Searching in Penn Marketplace

- Search function (suppliers, on-boarding status, invoice, payment status, etc.)
- How to resend the PO
- When picking up an assigned cart from email notification – a Penn Marketplace session needs to be open (If a PO Manager in BEN needs to access Penn Marketplace via BEN)

Supplier Request/Registration

- Use of Proxy Registration
- Supplier Request email vs Supplier Registration
- When selecting OTHER in the Supplier Request – be specific
- W-9's not needed for REFUNDS
- Prior identified Independent Contractors who do not have the SPE and SPQ submitted should send to Supplier Support to append to profile in Penn Marketplace


Non-Po Payment Request Process

- Validation error corrections
- Favorites
- Terms
- Banking
- Discarding forms
- Description field character limitation
- Limited Engagement forms
- Limit Will Call checks
- OACP Findings/Remediation



Email Directory

Where do I send my questions/issues/concerns?

- SupplierSupport@upenn.edu: Questions related to supplier/payee onboarding such as supplier registration status, updating a supplier record, inviting/re-inviting a payee, etc.
 - APSup@upenn.edu: Questions about Non-PO payment requests, invoices and payments.
 - PurchasingSupport@upenn.edu: Setting vacation rules, new delivery locations and BEN Buys related items(non-invoice/payment related).
 - PennMarketplace@upenn.edu: For issues with the experience in the Penn Marketplace, such as missing carts, error messages or shopping related issues such supplier punchout, catalog pricing and error messages received in the Marketplace.
 - Sourcing@upenn.edu: Contracts to be reviewed by the Purchasing Sourcing Team, supporting documents for bid waivers.
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Training Requirements & Support Resources

Training Requirements

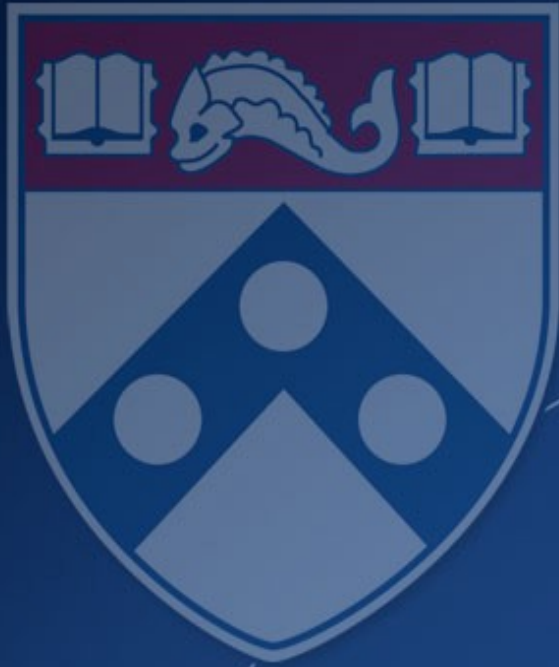
- Preparers/Approvers must complete a web-based training on Knowledge Link.
- Training must be completed to have access to the Non-PO Payment Request form.
- New Preparers and Approvers should complete the [Ben Financials / Penn Marketplace Access Request eForm](#) to request access.

Quick Reference Guides (QRGs)

- Several QRGs and videos are available on the [Reference Guides](#) page of Purchasing Services website.
 - Completing New Supplier Requests
 - Submitting a Non-PO Payment Request
 - Approving a Non-PO Payment Request
 - SP Payment Request
 - Getting Started in Penn Marketplace (new!)
- Reference guides for **suppliers** can be found on [Doing Business With Penn.](#)

Support Resources

- Contact your Procurement Council member.
- Users should contact BEN HELPS (215.746.4357) or enter a ticket with BEN HELPS.
- Suppliers can contact Supplier Support at 215.898.7216 or SupplierSupport@upenn.edu.



Questions (Session 7 - 6/16/20)



Questions and Answers

Q. Why was the payment terms basis changed to invoice receipt date?

A. This change was initiated to ensure invoices are paid in a timely and efficient manner. If a supplier's payment method is currently set to check (net45), they can register in Penn Marketplace and update their payment method to ACH (net-30), ePayables (net10). In the event a supplier would like to update their payment method from check, please send a request to suppliersupport@upenn.edu and include the supplier's BEN number and email address.

Q. Is it possible for departments to send invoices?

A. While it is possible for departments to send PO invoices to poinv@upenn.edu (one pdf file per invoice), we ask that departments encourage suppliers to register in Penn Marketplace. Once the supplier has registered in the Penn Marketplace, they can 'flip' POs to invoices. You can find more information about this function by clicking [HERE](#). Non-PO invoices should be submitted via the Non-PO payment request.

Q. When are checks being printed?

A. Due to Covid-19, Accounts Payable is printing checks on a bi-weekly basis. **Friday, June 26, 2020** is the next print date.

Q. What is the timeframe when assigning approval substitutes?

A. Substitute approvers should be assigned for PTO leave. Use the timeframe functionality. Substitutes should be existing trained approvers. If there is a need for an extended time you should submit an e-form (<http://provider.www.upenn.edu/computing/da/eforms>) to have it permanently changed.

Q. Do I have to enter a services rendered location for items such as phone bills, rent, etc?

A. Yes, there is an option to select N / A – no services rendered, if a location is not applicable.

Q. Should UPHS payroll paid employees receive reimbursements through Penn Marketplace?

A. No, they should be paid through their reimbursement payment system (Chrome River)



Questions and Answers

Q. How do I retrieve a form that has been **rejected**?

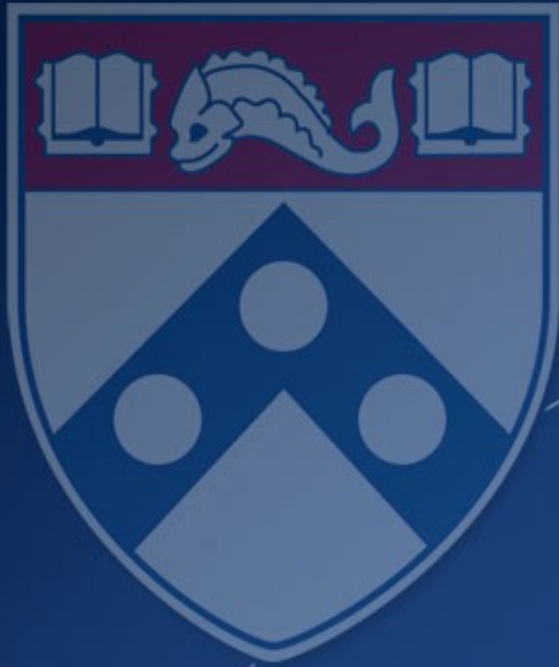
A. If your Approver rejects your form, you will need to submit a new form.

Q. How do I retrieve a form that has been **returned**?

A. If your Approver has returned your form to you, you can edit that form and resubmit. You can search for your form by utilizing the following functions from your Penn Marketplace homepage: Search AP – Invoices – AP Requests.

Q. How can I update a supplier's payment address and resend a stale check?

A. Please submit a 'cancel/resubmit payment' request form to accounts payable by emailing dofapsupp@pobox.upenn.edu. In the event a supplier would like to update their payment method from check, to ACH/direct deposit or wire transfer (**wires are applicable to NON-US Based Entities ONLY**), please send a request to suppliersupport@upenn.edu.



Questions (Session 6 - 2/6/20)





Questions and Answers

Q. How can I find a PO that is not mine?

A. Type the PO # into the search box in the right top portion of the Penn Marketplace home page.

Q. Can I see a supplier's invoice vs. the rendered invoice?

A. Not for cXML, but if suppliers are flipping POs in the Penn Marketplace they have an option to attach for invoice.

Q. What is the normal invitation turn around for a new supplier request?

A. 2 days

Q. How often to invite reminders go out?

A. After 10 days

Q. How can a supplier inquire about payment?

A. They can register on to the Penn Marketplace and view payment status on invoices.

Q. Assigning carts?

A. You cannot click the link on the email notification, you must go into BEN Buys and complete.

Q. How do I tell if a supplier/payee is international or domestic?

A. In the supplier profile you can view the legal entity structure.



Questions and Answers

Q. How can I see what the supplier sees during the registration?

A. See registration guide link (<https://cms.business-services.upenn.edu/purchasing/making-purchases/penn-marketplace/training/reference-guides.html>)

For Suppliers

- [Supplier Registration for Individuals/Payees \(Video\)](#)
- [Supplier/Independent Contractor Resource Guide](#)
- [Individual Registration Guide](#)

Q. How can a foreign individual obtain a W-8BEN?

A. During the registration, the system renders this form. They can also click a link to get access to the form.

Q. How do I treat a U.S. citizen living abroad?

A. As a U.S. citizen

Q. How do I convert a Non-PO supplier to a PO supplier?

A. Send a request to supplier support.

Q. Is there a report of deactivated suppliers? How can we notify end users about suppliers being deactivated

A. You can inquire in BEN (invoice inquiry), PURCHASING WILL NEED TO LOOK INTO OPTIONS FOR NOTIFYING END USERS. CURRENTLY, THE END USER IS ONLY NOTIFIED WHEN TRYING TO USE THE DEACTIVATED SUPPLIER



Questions and Answers

Q. Can I sort my requests by date, can the supplier name be visible? Spending too much time on searching.

A. We have an active request with Jaggaer, keep track of your form and invoice numbers, also search by supplier

Q. Are there issues with sharing favorites (missing information)?

A. Not that we are aware of but please send an example and we will investigate

Q. How do I set up my accounting code favorites?

A. Go to your view profile, default user settings, accounting code defaults, code favorites

Q. Notifications when cart is assigned – how can end users easily set up notifications?

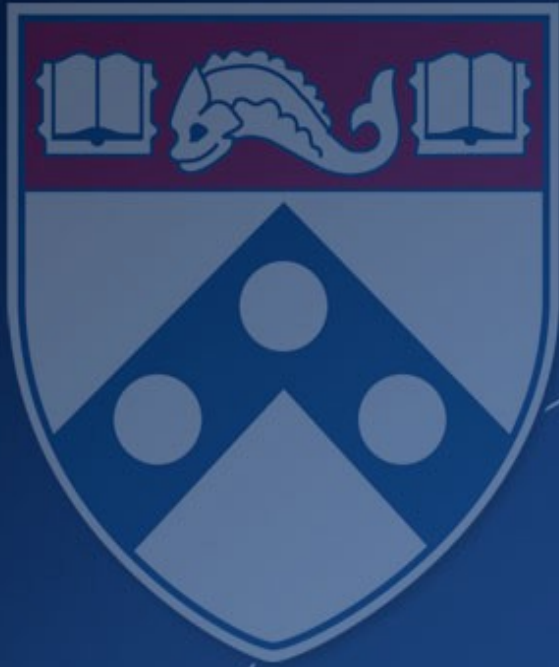
A. UPDATE YOUR PROFILE IN THE MARKETPLACE BY VIEWING PROFILE – NAVIGATING TO ‘NOTIFICATION PREFERENCES’ – GO TO SHOPPING, CARTS, AND REQUISITIONS. FROM HERE END USERS CAN TURN ON/OFF NOTIFICATIONS

Q. Default supplier email – can the supplier request be updated with most recent supplier contact?

A. THIS REQUEST CAME FROM BARBARA N. – SHE SENDS OUT MASS EMAILS TO SUPPLIERS BUT THE CURRENT EMAIL DOES NOT SHOW ON THE ADMIN SIDE. END USERS HAVE TO GO THROUGH COMPLETE LIST TO FIND MOST RECENT EMAIL FOR SUPPLIER

Q. Non PO payment requests – can we add the option to name the form rather than search by form number? Not easy to locate non po payment request that have not been approved yet?

A. PURCHASING WILL WORK WITH JAGGAER TO INCORPORATE A NAMING SCHEME FOR FORMS RATHER THAN USING FORM REQUEST NUMBERS ONLY.



Questions (Session 5 - 10/30/19)

Questions and Answers

Q. Where can I find more information about PO Flips to Invoices?

A. Separate documentation is available on the [Doing Business With Penn pages](#) on the Purchasing website.

Q. How is PO Change Order assigned?

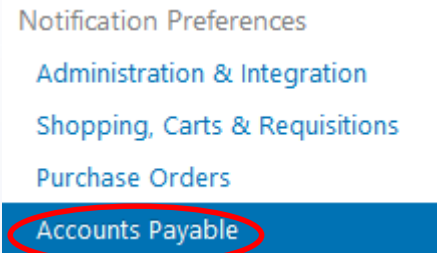
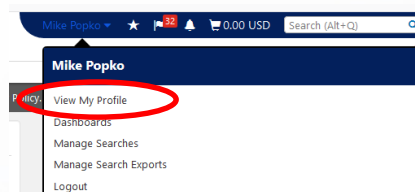
A. This capability is assigned on a limited School and Center basis. Please contact Vira Homich for more information.

Q. My PI wants to review PO invoices before they are sent to Accounts Payable?

A. PO Invoices should not go to the departments first, they should be sent to AP directly. POs can be set up for receipt required. Invoices will be put on hold in MarkView for further review. Keep in mind, any delay in getting invoices to AP will add days to the payment (Penn's terms are now based on invoice receipt (to AP) date).

Q. I am not receiving Level 2 approval email notifications?

A. Please check your Penn Marketplace profile's Notification Preferences.





Questions and Answers

- Q. If a Non-PO Payment Request Form is returned should the preparer receive a email notification?
- A. Yes, if not check their Notification Preferences.
- Q. How do I obtain banking information from a foreign supplier/payee?
- A. Ideally you would want the supplier/payee to register in the portal and enter this information directly.
- Q. What is the best way to create subcontract awards?
- A. Create a PO to the subcontractor and request a receipt required so that you need to review before releasing for payment.
- Q. What are the terms on will call checks?
- A. Will call checks are paid immediately and bi-pass existing terms.
- Q. Is there a Jaggaer helpdesk that support different languages? Spanish or Mandarin/Cantonese (China)?
- A. This is a functionality in Jaggaer that requires a lot of configuration and will be looked into for future release.



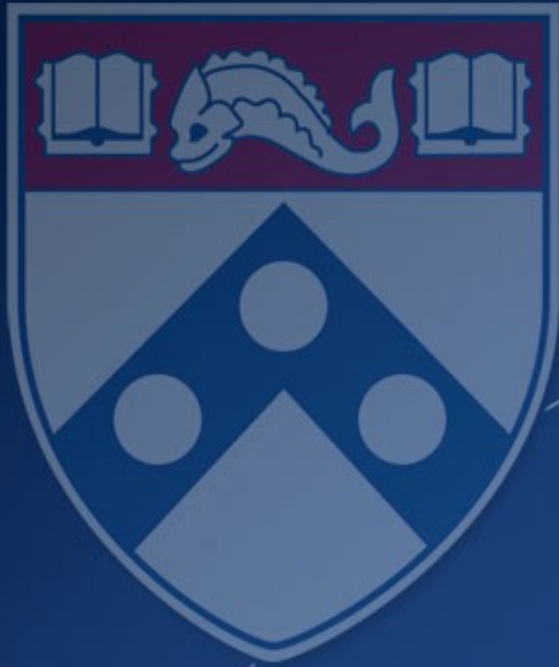
Questions and Answers

Q. What is the supplier's technical contact for Jaggaer?

A. Email Support@scquest.com

Q. How are new supplier remit to addresses added?

A. Ideally you would want the supplier/payee to register in the portal and enter these new remit to addresses. You can also submit a request to PurchasingSupport@upenn.edu.



Questions (Session 4 - 7/25/19)



Questions and Answers

- Q. What is the sender's email address for the supplier registration invites to the Penn Marketplace?
- A. University of Pennsylvania DONOTREPLY@sciquest.com
- Q. How are PDA-FC (foreign currency) Forms submitted now?
- A. We have reached out to users with high volumes already and signed them up for sending their forms to a dedicated email box. If you haven't been contacted and you have a one-off PDA-FC Form you can email it to Renee Nowaczyk reneenow@upenn.edu.
- Q. How do I search for a cart #?
- A. Look in My Carts in the left hand navigation and click on the cart # to see the PO created.
- Q. How do I order Ethanol Alcohol?
- A. Please follow instructions to order alcohol on main campus by completing this [form](#), or as indicated by your school's procedures.
- Q. How do I order a non-catalog item?
- A. Any PennID user can order a non-catalog item from any of the catalog or punchout suppliers in the Penn Marketplace by selecting the non-catalog form. If ordering from other suppliers only a BEN Buys user can create a requisition for a non-catalog item in BEN.



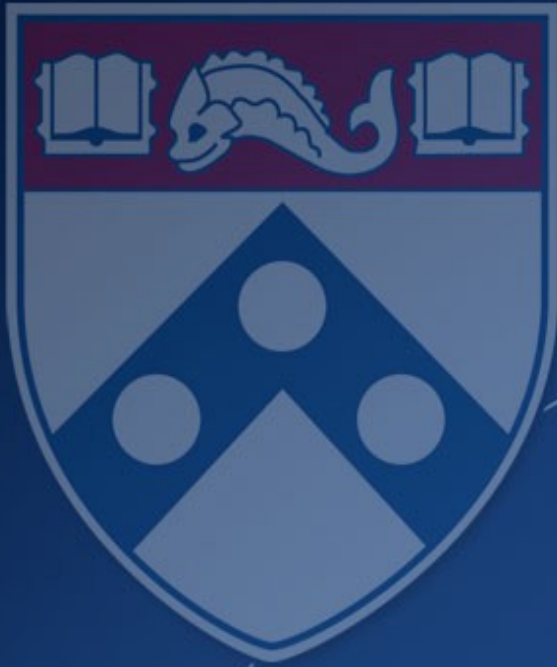
Questions and Answers –cont.

Q. How do you submit a quote?

A. To submit a quote from a supplier that does not have the quote to order feature on their ordering site, add the line items into a non-catalog form and the prices with referencing the Quote # into notes.

Q. How do you submit lines for samples?

A. Add free samples on the order with the non – catalog form and add the lines at \$0.



Questions (Session 3: 5/19/19)





Questions and Answers

Q. Can I get 1 line item on PO to be paid immediately.

A. You can request the PO be changed to immediate by contacting PurchasingSupport@upenn.edu. If you want the 2 items paid differently - create 2 PO's or speak with your Supplier to encourage them to register on the portal and select epayables as a payment method for N10 terms.

Q. How do we add a new PO or PYASITE to a supplier if it is a different name but with the same TIN #?

A. A supplier can be invited and they can add the additional site to the record, alternatively you can reach out to Supplier Support to the address.

Q. When a vendor is approved when can we start the non-po payment process?

A. Check the Penn Marketplace and your supplier registration status. If you proxied the supplier, check the supplier status as active and check mark is in green.

Q. When submitting a non-po payment request, is there a way that a School/Center user change the supplier address.

A. The supplier address can only be changed by the supplier by entering the portal or request Supplier Support to make the change.

Q. Can you back date an invoice?

A. Suppliers that were converted into the Penn Marketplace are paid based on invoice date, New suppliers set up in the Penn Marketplace are on receipt date of invoice. We recommend you use the default date that is in the system. New suppliers start with the BEN supplier # of 61XXXX.



Questions and Answers

Q. Can you create PO's at end of month and get approved the next month?

A. If you create the PO and it moves to the next approver – that approver can change the GL date. If you are a PO Manager you cannot change the GL date.

Q. Can you look at status of Payments and approvals if you did not initiate it?

A. Search in Documents to find the payment – you can search by requestor, date parameters and other attributes.

Q. Penn students who are getting awards are entering the Penn Marketplace via their PENNID – is that correct?

A. Penn students who are getting awards need to register in the “supplier portal” upon receiving an invite to check on their payments.

Q. Some student suppliers when entered into the portal have the PENNID's appended while others do not, is there any ramifications to this difference?


A. When students enter the portal it is important that they identify themselves as a student, the system integration automatically appends their PENNID. If there is an issue with a duplicate invite, please contact Supplier Support.

Q. If an individual is invited to the portal and it shows a status of still invited, we can see at what point the individual is in the registration process? Does the second invite wipe out information that they have already entered?

A. Only if the registration status shows as In Progress does it mean the individual has started the process but has not completed. If the individual continues to have an issue and you have their W-9, you may securely send it to Supplier Support.

Q. If the Supplier registration status reflects as complete but does not show up in the drop down, what do we do next?

A. Please give 24 hrs for any further delays since the supplier record might not have synced successfully into BEN and additional review is being made by the vendor management team. If any further delays please contact Supplier Support.





Questions and Answers

Q. Can we see what the supplier sees during registration? Can any size supplier register on the portal?

A. Any size supplier can register on the portal and flip their PO's if needed and can even attach their own invoice if details are needed. End users can see what the suppliers are completing on the registration site by referencing this guide located on the Penn Purchasing Services website. <https://cms.business-services.upenn.edu/purchasing/supplier-resources/supplier-resources/reference-guides.html>

Q. How quick should the non-po payment get turned around?

A. This depends on the amount of the request and how many approvals it needs. You can always see where it is in the approval step.

Q. How long does it take to get access to the system?

A. [https://provider.www.upenn.edu/computing/da/eforms/Access to BEN and the Penn Marketplace](https://provider.www.upenn.edu/computing/da/eforms/Access%20to%20BEN%20and%20the%20Penn%20Marketplace) is done via eform and can be managed by viewing its status at <https://provider.www.upenn.edu/computing/da/eforms/>

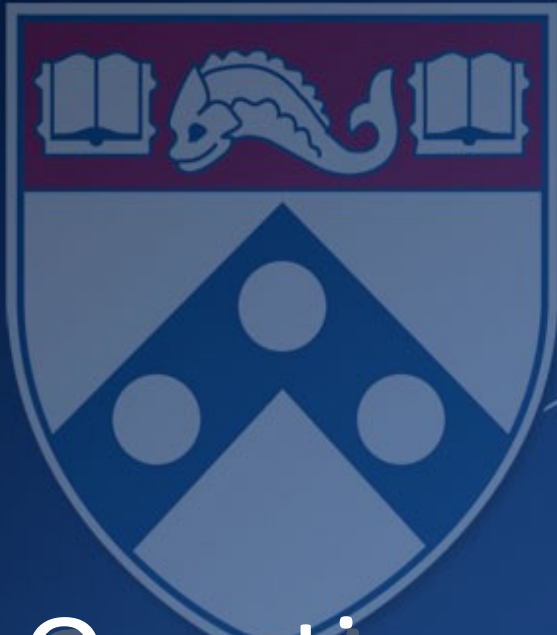
Q. A non-po payee was invited to the portal but tried to register and it said the email address is used by another individual.

A. The individual was perhaps invited by another person, already existed with a different spelling, or the email address is associated with a previous account. Please contact Supplier Support for resolution.

Q. Can we see less of our previous New Supplier Requests?

A. Yes, merely use the filters to only view active ones or whichever ones you want to review.





Questions (Session 2: 03/13/19)





Questions and Answers

- Q. I have a PO vendor with a PO # but couldn't find them in Jaggaer?
- A. All active vendors will be in both BEN and the Penn Marketplace. PO invoices can be submitted 5 different ways:
- I. Electronically via cXML
 - II. Vendor initiated PO flips within the Marketplace
 - III. Vendors sending PO invoice to AP's email box (poinv@upenn.edu), one pdf file per invoice!
 - IV. Via normal mail (please encourage vendors to use the mailbox)
 - V. Via Schools and Centers (this is a no-no, PO invoices need to come to AP directly from the vendor)

All POs are generated in BEN and sent through the Marketplace to the supplier.

- Q. How clear are the payment options for the supplier/payee?
- A. They are very clear. The supplier/payee will see the payment options at the start of registration and their related terms, and will need to make a choice. Supplier/Payee will also have a link to the registration guide.
- Check – 45 Days
 - ACH – 30 Days
 - ePayables – 10 Days
 - Individuals/Independent Contractors – immediate



Questions and Answers

- Q. Why does the address not show up after entering a supplier name on the Non-PO Payment Request? It just says Home.
- A. Please provide example back to the team. You will need to scroll down through the remittance sites and once you pick a site the address will show.
- Q. How can suppliers/payees reset their password?
- A. On the log in screen they can click the Forgot your password link and reset their own.
- Q. When I search my suppliers the order of the view is oldest to newest, can we change that to newest to oldest?
- A. We will log this back to Jaggaer.
- Q. What is the criteria for a proxy new supplier request?
- A. The preference is to not proxy the on-boarding of new suppliers/payees. Having them self register is the safer and fastest way to get them paid. Their W-9/SSN are protected and they can set themselves up for ACH. Schools and Centers will need to decide whether the self-registration will be problematic and will create a negative experience for them or they are good to self register. Elderly, VIP and disabled payees are proxy examples. See link to proxy how to video: <https://cms.business-services.upenn.edu/purchasing/making-purchases/marketplace-enhancements/training/reference-guides.html>



Questions and Answers

- Q. Are we planning to broaden the scope of the Greenphire card?
A. Yes, we already have (e.g., guest travel per diem, student athletes, prospective student visits), plan to continue to stretch/pilot the program.
- Q. What does the email invite look like?
A. Email comes from University of Pennsylvania Do Not Reply at sciquest.com, if they don't receive they can check their Junk box, or we can resend the invite. Sometimes we might ask for an alternative email address.
- Q. I submitted a new supplier request and realized I entered the wrong email address, how do I correct it?
A. Reach out to Supplier Support and ask them to correct before the invite is sent out.
- Q. An individual does not want to provide Penn with a W-9 for travel reimbursements?
A. Let the individual know they can register in the portal and securely load their W-9.



Questions and Answers

- Q. Can I identify more than one goods/service when submitting a new supplier request?
- A. No, just pick the one that is more prominent. On the Non-PO Payment Request you will have the opportunity to choose multiple types.
- Q. I just received an invoice and the work is already done?
- A. Remind your faculty they must onboard a new supplier and secure a PO before any work is done. If a limited engagement, they must be on boarded first before you submit a Non-PO Payment Request. See [independent contractor webpage. https://www.hr.upenn.edu/policies-and-procedures/processes-and-procedures/service-provider-classification](https://www.hr.upenn.edu/policies-and-procedures/processes-and-procedures/service-provider-classification)
- Q. I've used an individual in the past submitting Non-PO Payment Requests. I am now being asked for a new forms, SP??
- A. I believe you are referring to the Service Provider Questionnaire or Evaluation forms, see link above. These should be signed off by your School or Center's HR Lead.



Questions and Answers

Q. I submitted a Non-PO Payment Request but how do I track it?

A. After you submit it you can go back into the form and review the Forms Approvals. Once approved at level 1 you can click the PMI... # on the form and that will take you to the invoice screen. You can then click the Approvals tab to follow the workflow.

Q. Can we give suppliers a guide to help them register?

A. [See link to Supplier Resources https://cms.business-services.upenn.edu/purchasing/supplier-resources/supplier-resources/reference-guides.html](https://cms.business-services.upenn.edu/purchasing/supplier-resources/supplier-resources/reference-guides.html)

Q. How do I see my supplier requests and Non-PO Payment Requests?

A. You can scroll down from the main menu to your dashboard and review My Form Requests.

Q. I submitted a Non-PO Payment request but would like to edit it?

A. First check to see where the form is in the workflow. Identify who's queue it is in and reach out to them and ask them to return the form. If already approved at Level 1, ask the approver to make the edit. If it is rejected you will need to start the form all over again.



Questions and Answers

Q. I can't assign a cart to myself?

A. To finish the process and pick up your cart you must be signed in to BEN Buys.

Q. At my School we have a lot guest speakers. Is there a way to mass load them?

A. Purchasing has some options, you should reach out to Supplier Support.

Q. Do we have a fake registration to go through and see what the supplier is dealing with?

A. No, see link on previous page (Supplier Resources), we'll consider adding additional screen prints.

Q. What is the plan for Penn Marketplace's record retention?

A. At least 7 years.

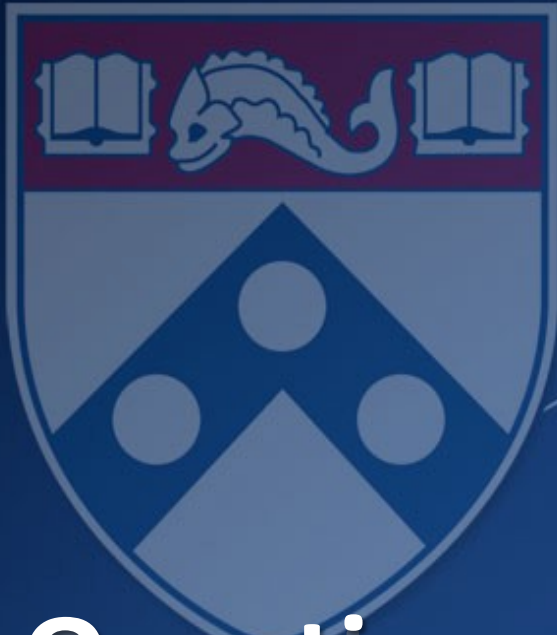
Q. How do I request a new PO supplier?

A. The Request New Supplier form is used for both PO and Non-PO Suppliers.



Questions and Answers

- Q. How and when will PO suppliers be able to update their payment method/terms?
- A. Purchasing is sending out invites to embedded suppliers in waves, based on volumes. If you would like to have a PO supplier invited you can reach out to Purchasing Support.
- Q. Before I submit a Non-PO Payment Request can I see a summary of the form (similar to an Amazon summary before confirming the purchase)?
- A. We have that on our list with Jaggaer.
- Q. Can I see the supplier's terms?
- A. You can see them in BEN (supplier inquiry). You can also look up the invoice in the Marketplace and see when the invoice is due or whether it was paid.
- Q. Can I proxy a foreign supplier?
- A. The preference is to have foreign suppliers self-register, if not they will receive a check. See the quick [reference guide for handling foreign suppliers. https://cms.business-services.upenn.edu/purchasing/making-purchases/marketplace-enhancements/training/reference-guides.html](https://cms.business-services.upenn.edu/purchasing/making-purchases/marketplace-enhancements/training/reference-guides.html)



Questions (Session 1:2/01/19)





Questions and Answers

- Q. When searching for Penn suppliers, will it tell you if the supplier is a Contract supplier?
- A. Yes. Select Shop > Browse by > Suppliers. The Preference column will reference the supplier type (Please refer to the Legend).
- Q. When the supplier selects the payment method, does it tell them the payment terms?
- A. Yes. The payment terms are referenced for each payment method at the start of the registration process.



Questions and Answers –cont.

- Q. Does the W9 have to be for the current year?
- A. No. You may use a W9 from previous years as long as there has been no changes (name, address or tax id change).
- Q. If a company has several entities, do you add them as a new supplier?
- A. It depends on the Tax Id. If all of the entities have the same Tax Id, the additional entity will be added to the original supplier record as a new pay site with the new name referenced at the site level. If the Tax Id is different, the supplier will be added with a new supplier number.
- Q. What do you do if the supplier is in the system as an Independent Contractor but they provide documentation for a Limited Engagement?
- A. If we have the SPE and SPQ, we will not need the Limited Engagement agreement unless the individual's services has now been deemed as a limited engagement based on the changed ORS guidelines for paying people providing certain services under grants.



Questions and Answers –cont.

Q. Are there common errors that suppliers encounter when registering?

A. Yes. Some of the common errors are missing tax documents, diversity classification, payment method, duplicate Tax Id's and selecting the appropriate the NAICS or commodity code.

Q. What email address is used when sending registrations?

A. The emails are sent from University of Pennsylvania donotreply@sciquest.com

Q. Where are the SPE and SPQ forms located?

A. These forms are located on the Human Resources website.
<https://www.hr.upenn.edu/policies-and-procedures/processes-and-procedures/service-provider-classification>

Q. Can you discard a supplier registration if you choose not to use them?

A. Central Administration can only discard if it is an incomplete request, otherwise we can also deactivate the supplier. However, you can cancel a requested supplier invitation by contacting SupplierSupport@upenn.edu.



Questions and Answers –cont.

- Q. How do you request training for Requisitioners and Non-PO payment requests?
- A. Please refer to Knowledge Link for training instructions and on the Purchasing [website at https://cms.business-services.upenn.edu/purchasing/making-purchases/marketplace-enhancements/training.html](https://cms.business-services.upenn.edu/purchasing/making-purchases/marketplace-enhancements/training.html)
- Q. What can be done to get a supplier to deliver packages to the correct labs?
- A. Verify the shipping address in your profile and confirm with the supplier. If the problem continues, contact PurchasingSupport@upenn.edu.
- Q. What documentation is required for Guest Travel reimbursements on Non-PO payment requests?
- A. You will need the receipts, the completed and signed GTR worksheet along with the following.
- US Citizen – W9 (payee provides during registration)
 - Foreign Supplier
 - W8 (payee provides during registration)
 - Passport (payee provides during registration)
 - Foreign National Information Form
 - Stamp of entry (I-94)
 - Business Justification