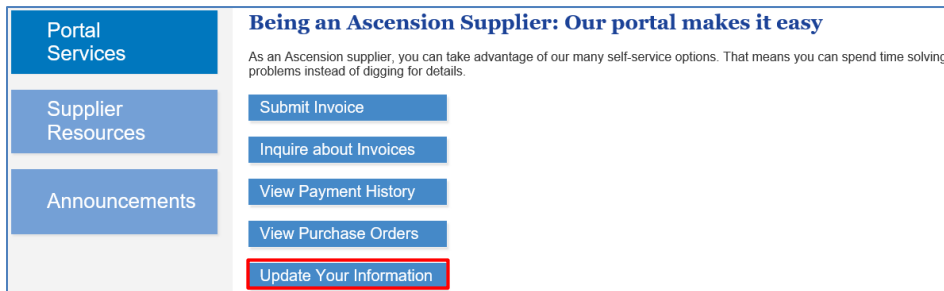


Submitting Supplier Data Change Requests Quick Reference Guide

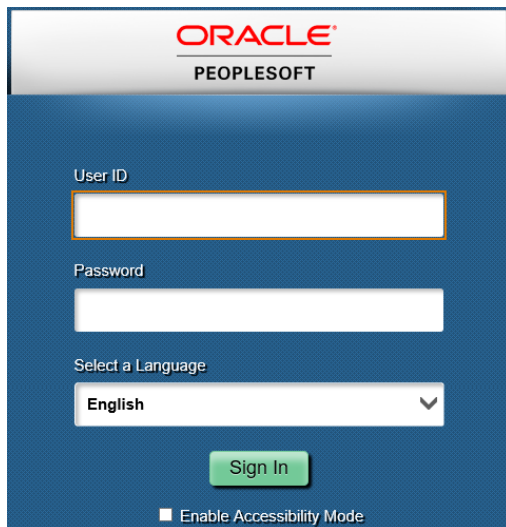
Purpose: This document provides instructions for how to submit a request to update supplier data via the Ascension Supplier Portal.

Audience: Supplier users with access to the Ascension Supplier Portal

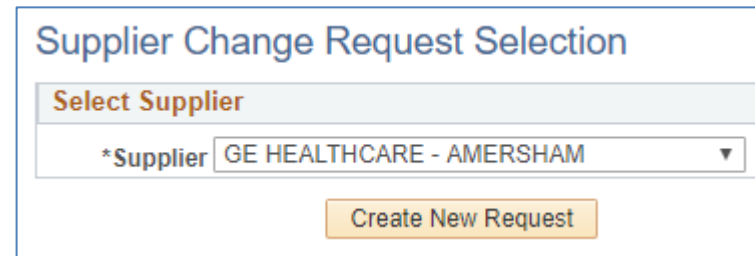
1. Navigate to the Ascension Supplier Portal at <https://supplierportal.ascension.org>.
2. On the **Portal Services** menu, click the **Update Your Information** button.



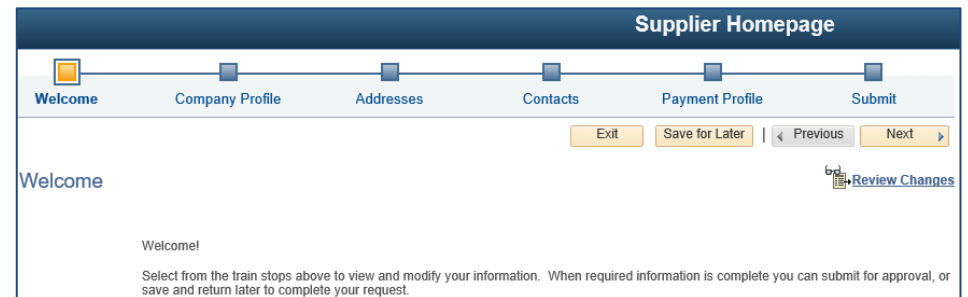
3. A new browser tab will open prompting you to log in to the Oracle PeopleSoft Supplier Portal.



4. Enter your User ID and Password and click the **Sign In** button.
5. If you have access to more than one supplier ID for your Supplier Portal user ID, you will be prompted to select which supplier you would like to submit the change request for. Select the appropriate supplier from the dropdown and click **Create New Request**.



6. You will be directed to the Welcome page and instructed to review and modify information from the train stops. Users progress from left to right as they view and request changes.



7. Click the **Next** button to proceed to the first trainstop for **Company Profile**.

Unique ID & Company Profile

*Supplier Name

Additional Name

*Classification

[Attachments](#)

8. Under **Unique ID & Company Profile** you can update your Supplier Name (this must match the name on your W-9) or add an Additional Name (the DBA on your W-9). **Please note:** You will need to attach an updated copy of your company's W-9 for this change. See step # 17.
9. Do not change the **Classification** dropdown.
10. You can click the **Attachments** link to view any documents currently on file for your company. **Please note:** it is important that you do not delete any of the files listed here.

▶ **Supplier Logo**

▶ **Additional ID Numbers**

11. **Please note:** Do not upload a Supplier Logo as it can cause issues with your request. Please skip this section.
12. The **Additional ID Numbers** section on this screen should not be used. If you need to update your Tax ID number, please email our National Operations Data Steward team at MDMSupplierRequests@TheResourceGroup.com and include an up-to-date copy of your W-9.

▶ **Profile Questions**

13. Click the arrow to expand the **Profile Questions** section and complete any fields relevant to the change you are requesting.
14. Please note that questions marked with an asterisk (*) are mandatory to proceed with the change request.

Profile Questions

By which means would you like to receive purchase orders from Ascension?

[Select](#)

Please select your preferred freight terms
 Note: if your company has a contract with Ascension, the freight terms within the contract override any preferences indicated here

[Select](#)

→ *Is your company subject to IRS 1099-MISC tax form reporting?

Yes
 No

→ *Is your company a disadvantaged, minority, small veteran, woman, or underutilized business?

[Select](#)

15. To update your company's PO Dispatch Method, click the **Select** button for the first question and choose from the available options.

List Values Personalize | Find | | First 1-4 of 4 Last

List Line Number	Payment Information
1	Email
2	EDI
3	Fax
4	Not a product or service provider

[Return](#)

16. To update your company's preferred freight terms, click the **Select** button for the second question and choose from the available options. **Note:** if your company has a contract with Ascension, the freight terms within the contract override any preferences indicated here.

Personalize | Find | First 1-3 of 3 Last

List Line Number	Payment Information
1	FOB Dest, Freight Prepaid Seller
2	FEDEX 3rd Party Billing
3	FOB Ship Point, Freight Prepaid Seller

Return

17. A signed copy of your company's W-9 is required for changes to your Supplier Name. Click the Add/View Attachments button to attach a signed W-9.

Please attach a signed copy of your company's W9

Attachments (0)

18. If you are requesting to update your company's payment method to ACH direct deposit, please contact our National Operations Data Steward team at MDMSupplierRequests@TheResourceGroup.com.

If you will be indicating ACH as your company's preferred payment method, please attach your completed Ascension ACH form here

Attachments (0)

19. Click the **Next** button to progress to the next trainstop.

Welcome **Company Profile** Addresses Contacts Payment Profile Submit

Exit Save for Later Previous **Next**

20. On the **Addresses** trainstop you can add new addresses or edit existing addresses on file. At least one physical address is required.

21. To add an address, click the **Add New Address** button.

Address Information

Description

Country United States

Address 1

Address 2

Address 3

City

County Postal

State

Email ID

Phone Information

*Phone Type	Location	Prefix	Telephone	Extension
Business Phone	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

- Fill in all fields for **Address Information**.
- Fill in the **Phone Information** if applicable. To add additional phone contacts, click the **Add Phone** button.

Payment/Withholding Alt Names

Payment Alternate name

Name 1

Name 2

- If you would like Ascension to issue checks to your company's DBA name instead of the name on line 1 of your W-9, please expand the **Payment/Withholding Alt Names** section and enter the DBA name in the **Name 1** field.

Approved Changes Take Effect: Approval Date Future Date

- Indicate if the approved changes should take effect on the Approval Date or another Future Date.

- e. Click the **OK** button to save the new address. **Please note:** your request is not submitted until you proceed to the **Submit** trainstop and click Submit.

22. To edit or inactivate an existing address, click the pencil icon next to the address.

Description	Address Line 1	Change Action	Change Effective Date	Edit
MAIN PRINCETON NJ	101 CARNEGIE CTR	Update	02/05/2018	

- a. To edit the address, please make any necessary changes to the **Address Information** and **Phone Information** sections.
- b. To inactivate the address, change the **Effective Status** dropdown to 'Inactive.' **Note:** please do not select to remove the address at the top left of the screen, as it must remain on file for historical data.
- c. Indicate if the approved changes should take effect on the Approval Date or another Future Date.
- d. Click the **OK** button to save your changes. **Please note:** your request is not submitted until you proceed to the **Submit** trainstop and click Submit.

Address Information for COLLECTIONS

Remove Address

Address Information

Description: COLLECTIONS Effective Status: Active

Country: USA United States

Address 1: ATTN COLLECTIONS

Address 2: 3200 N GRANDVIEW BLVD BLD WT896

Address 3:

City: WAUKESHA

Country: Postal: 53488

State: WI Wisconsin

Email ID:

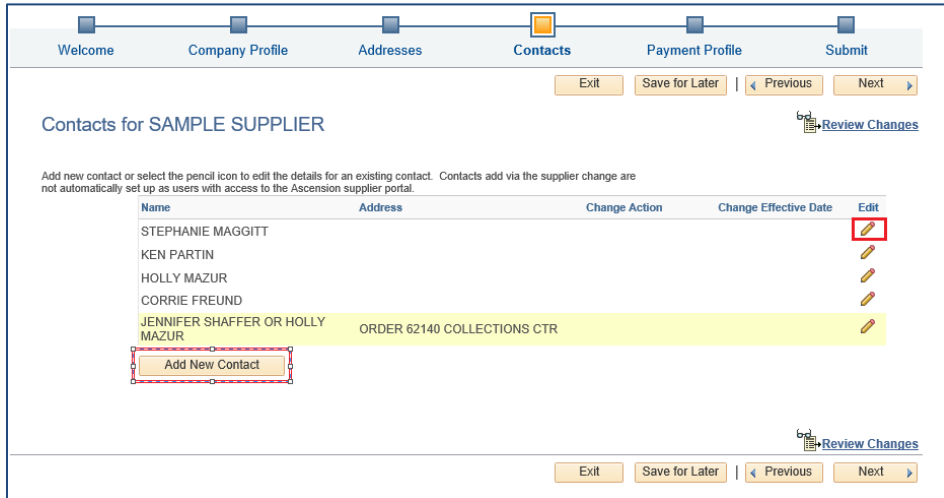
Phone Information

Phone Type	Location	Prefix	Telephone
Business Phone	<input type="text"/>	1	800/292-8514
FAX	<input type="text"/>	<input type="text"/>	866/375-2093

Approved Changes Take Effect: Approval Date Future Date






23. Click the **Next** button to progress to the next trainstop.

24. On the **Contacts** trainstop you can add, edit, and remove contacts for the Supplier ID in our PeopleSoft system. **Please note:** Adding an individual or updating contact information from this screen does **not** update the user profile for the Supplier Portal.



Contacts for SAMPLE SUPPLIER

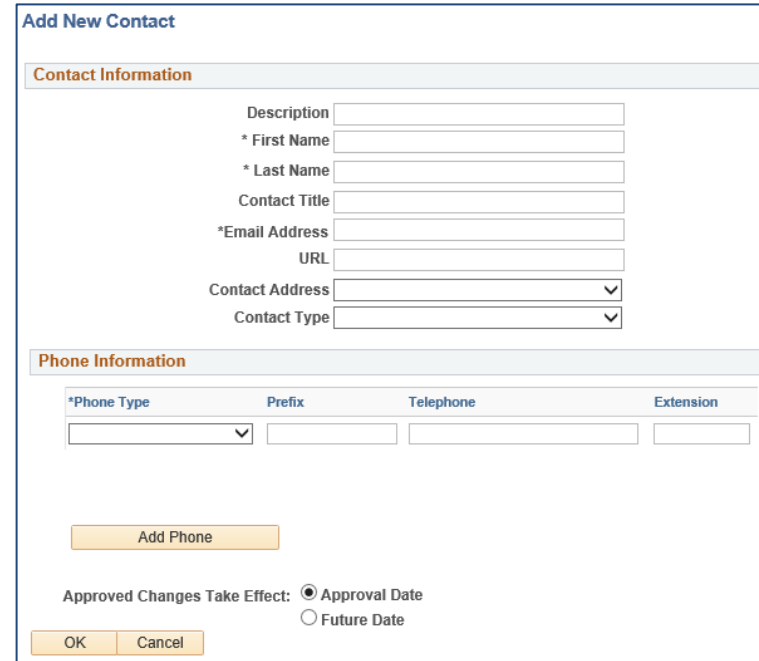
Add new contact or select the pencil icon to edit the details for an existing contact. Contacts add via the supplier change are not automatically set up as users with access to the Ascension supplier portal.

Name	Address	Change Action	Change Effective Date	Edit
STEPHANIE MAGGITT				
KEN PARTIN				
HOLLY MAZUR				
CORRIE FREUND				
JENNIFER SHAFFER OR HOLLY MAZUR	ORDER 62140 COLLECTIONS CTR			

Add New Contact

25. To add a new contact, click the **Add New Contact** button.

- Complete the **Contact Information** section. **Note:** The first and last name and email address for the contact are required.
- Complete the **Phone Information** section. To add additional phone contacts, click the **Add Phone** button.
- Indicate if the approved change should take effect on the approval date or on a different future date.
- Click **OK** to save your changes. **Please note:** your request is not submitted until you proceed to the **Submit** trainstop and click Submit.



Add New Contact

Contact Information

Description

* First Name

* Last Name

Contact Title

*Email Address

URL

Contact Address

Contact Type

Phone Information

*Phone Type	Prefix	Telephone	Extension
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Add Phone

Approved Changes Take Effect: Approval Date Future Date

OK **Cancel**

26. To edit or remove an existing contact, click the pencil icon next to the contact.

27. To remove a contact, click the checkbox next to **Remove Contact** and click **OK** to save your changes. **Please note:** your request is not submitted until you proceed to the **Submit** trainstop and click Submit.




Contact Information for STEPHANIE MAGGITT

Remove Contact

28. Click the **Next** button to progress to the next trainstop.

29. On the **Payment Profile** trainstop, you can update your company's payment method, ordering address, payment terms, or remit address.

Description	Change Effective Date	Default	Edit
MAIN - MAIN	01/03/2018	<input checked="" type="checkbox"/>	

30. Click the pencil icon to edit the MAIN location for your company.



31. To edit your company's ordering or remit address, click **Select a Different Address** under the appropriate section and select an address from the available options.

32. Click the **OK** button to save. **Please note:** your request is not submitted until you proceed to the **Submit** trainstop and click Submit.

Remitting

Supplier	GE HEALTHCARE - AMERSHAM	Select a Different Address
	REMIT POB 641936 PITTSBURGH	
	PO BOX 641936	
	PITTSBURGH, PA 15264-1936	

33. To request to update your payment terms, click the magnifying glass under **Payment Preferences** and select the appropriate option from the pop-out window. **Please note:** Additional approvals may be required for updates to payment terms. Payment terms must be consistent with what is indicated in your Ascension contract.

Payment Preferences

Payment Terms ID Due Now

Payment Method

34. To request to update your payment method to check or ACH direct deposit, change the dropdown option in the **Payment Preferences** section to either 'Automated Clearing House' or 'System Check.' **Please note:** prior to requesting a payment method change to ACH, you must contact our National Operations Data Steward team by emailing MDMSupplierRequests@TheResourceGroup.com.

- If you request to update your payment method to ACH, check the box to **Enable Email Payment Advice** under the **Payment Notification Preferences** section.
- Enter the email address you wish to receive payment notifications to in the **Email ID** field.

Payment Notification Preferences

Enable Email Payment Advice

Email ID

Payment Method	Remove
Automated Clearing House	<input type="checkbox"/>

- To update your company's payment method to ACH, you are required to attach a completed Ascension ACH form in the **Profile Questions** section under the **Company Profile** trainstop.
- Please do not add any attachments to this section.

35. Click the **Next** button to progress to the next trainstop.

Welcome Company Profile Addresses Contacts Payment Profile **Submit**

Exit Save for Later Previous Next

Review and Submit Changes for MEDTRONIC USA INC

By submitting changes through this tool, I certify that I am an employee of the organization that is authorized to make these requested changes and it is accurate to the best of my knowledge.

Use the "Review" button to review changed information.

Use the "Submit" button to submit your change request.

Email communication regarding this request will be sent to:

Confirm Changes

Exit Save for Later Previous Next

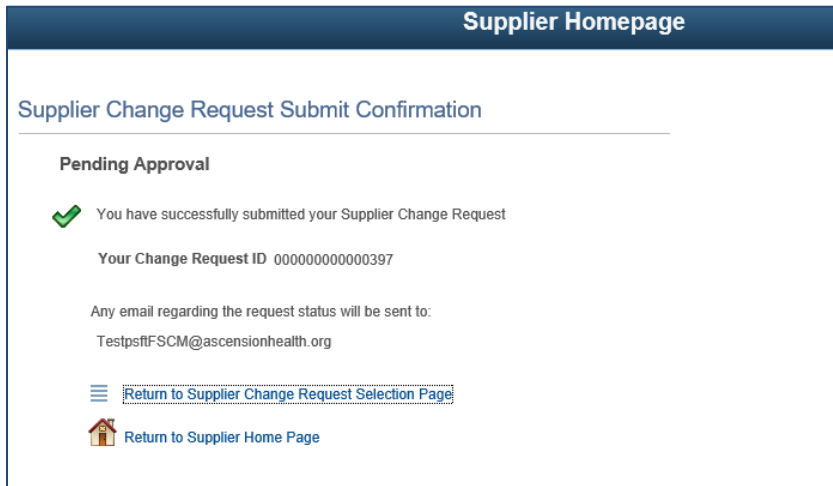
36. On the **Submit** trainstop you will be prompted to review your changes before submitting your request.

- Click the **Review** button to review information related to your change request.
- Enter the email address where you would like to receive communication regarding this change request.



- c. Once you have confirmed all information is accurate, check the box next to **Confirm Changes**.
- d. Click the **Submit** button to submit your change request. **Please note:** Clicking **Save for Later** will save a draft of your request that you may submit later. Requests will not be reviewed for approval until you click the **Submit** button.

37. Upon submission, the below confirmation is displayed with the **Change Request ID** number.



38. If you need to submit additional updates to information on your supplier ID in our PeopleSoft system, please email our National Operations Data Steward team at MDMSupplierRequests@TheResourceGroup.com.