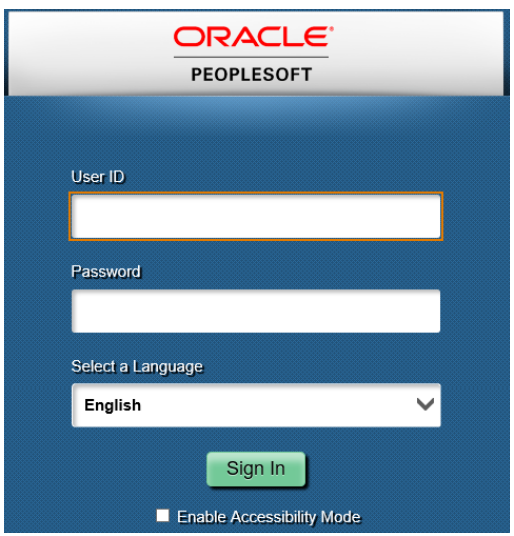
Submitting Supplier Data Change Requests
Quick Reference Guide

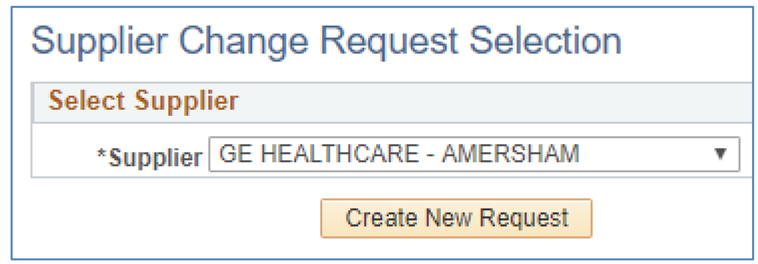
Purpose: This document provides instructions for how to submit a request to update supplier data via the Ascension Supplier Portal.
Audience: Supplier users with access to the Ascension Supplier Portal

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

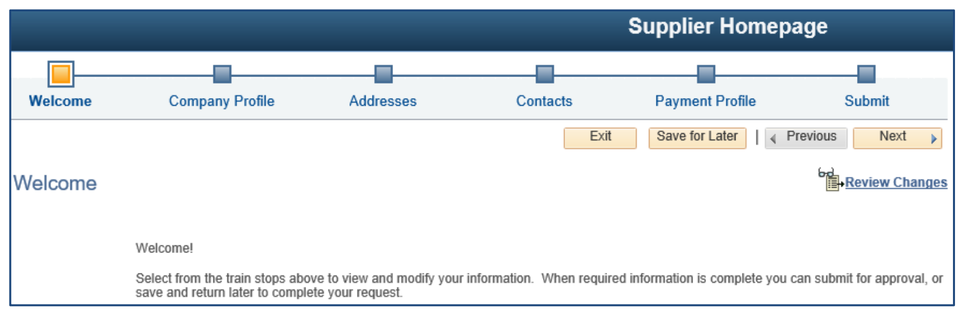
3. A new browser tab will open prompting you to log in to the Oracle PeopleSoft Supplier Portal.



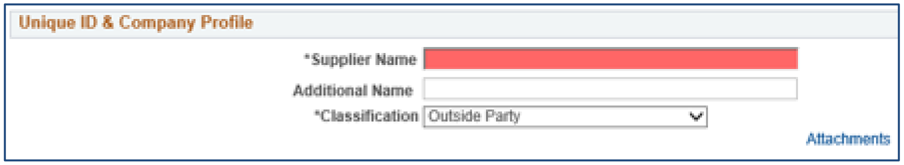
4. Enter your User ID and Password and click the **Sign In** button.
5. If you have access to more than one supplier ID for your Supplier Portal user ID, you will be prompted to select which supplier you would like to submit the change request for. Select the appropriate supplier from the dropdown and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



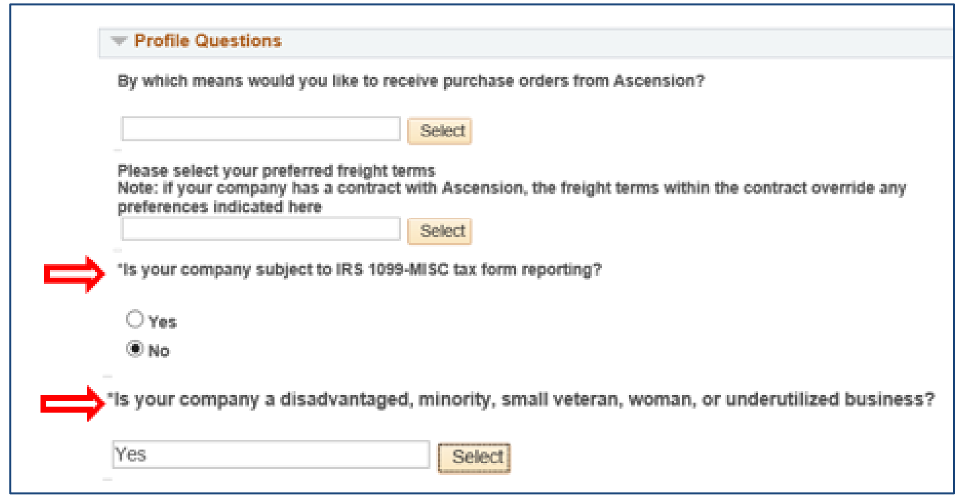
7. Click the **Next** button to proceed to the first trainstop for **Company Profile**.



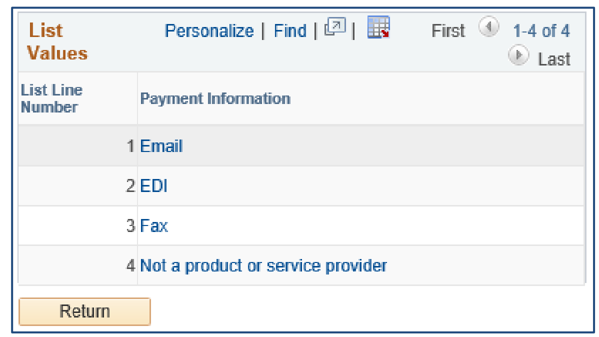
8. Under **Unique ID & Company Profile** you can update your Supplier Name (this must match the name on your W-9) or add an Additional Name (the DBA on your W-9). **Please note:** You will need to attach an updated copy of your company's W-9 for this change. See step # 17.
9. Do not change the **Classification** 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.

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.

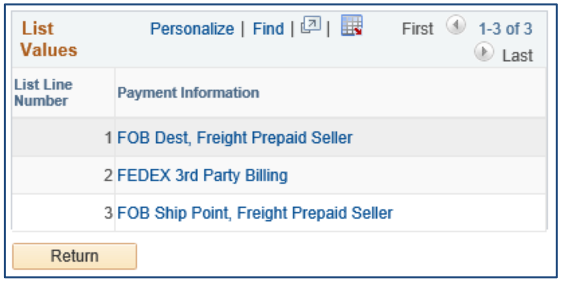
13. Click the arrow to expand the **Profile Questions** section and complete any fields relevant to the change you are requesting.
14. Please note that questions marked with an asterisk (*) are mandatory to proceed with the change request.



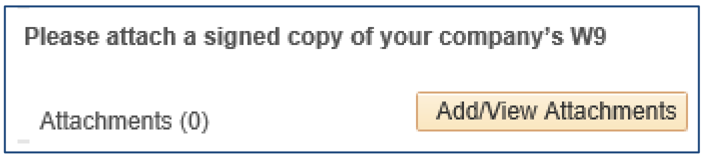
15. To update your company's PO Dispatch Method, click the **Select** button for the first question and choose from the available options.



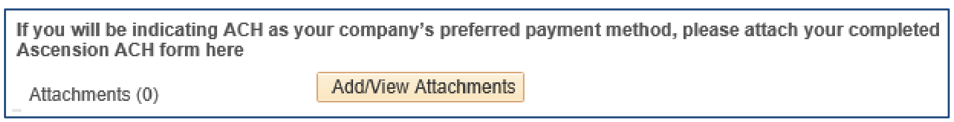
16. To update your company's preferred freight terms, click the **Select** button for the second question and choose from the available options. **Note:** if your company has a contract with Ascension, the freight terms within the contract override any preferences indicated here.



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.

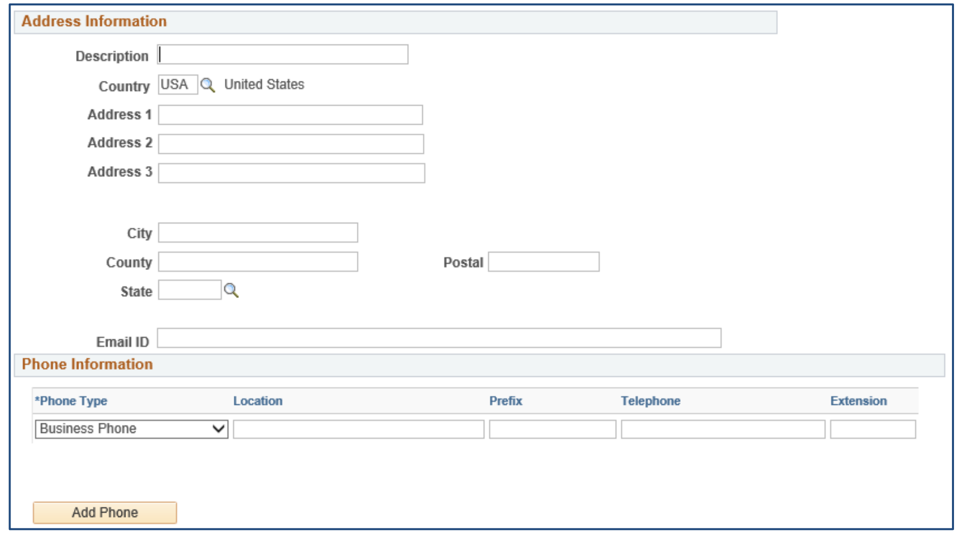


18. If you are requesting to update your company's payment method to ACH direct deposit, please contact our National Operations Data Steward team at MDMSupplierRequests@TheResourceGroup.com.



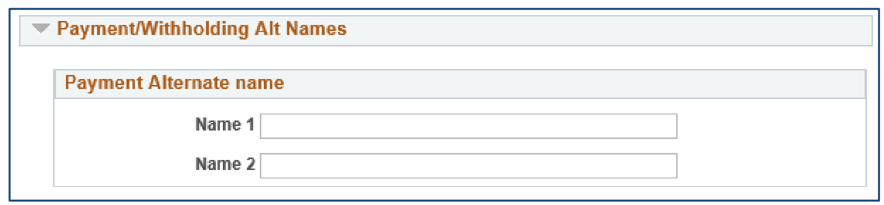
19. Click the **Next** button to progress to the next trainstop.

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.

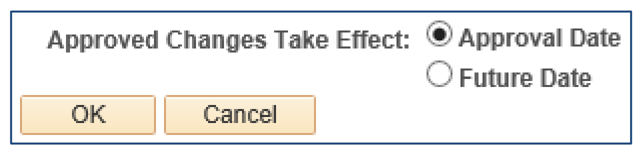


a. Fill in all fields for **Address Information**.

b. Fill in the **Phone Information** if applicable. To add additional phone contacts, click the **Add Phone** button.



c. 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.



d. 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.

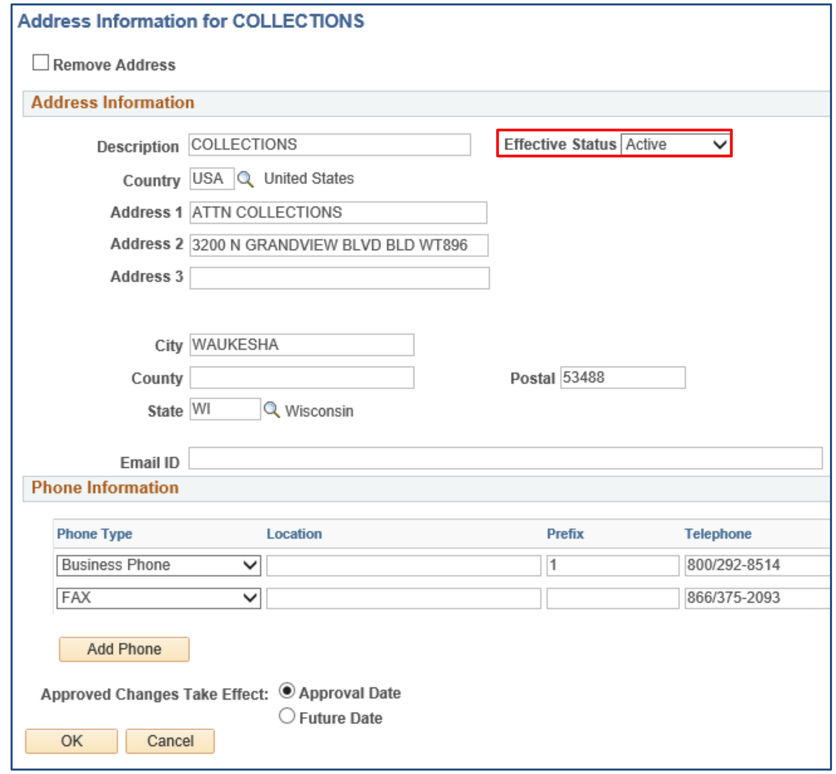
Description	Address Line 1	Change Action	Change Effective Date	Edit
MAIN PRINCETON NJ	101 CARNEGIE CTR	Update	02/05/2018	

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. Cick 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
County
Postal 53488
State WI Wisconsin
Email ID

Phone Information

Phone Type	Location	Prefix	Telephone
Business Phone		1	800/292-8514
FAX			866/375-2093

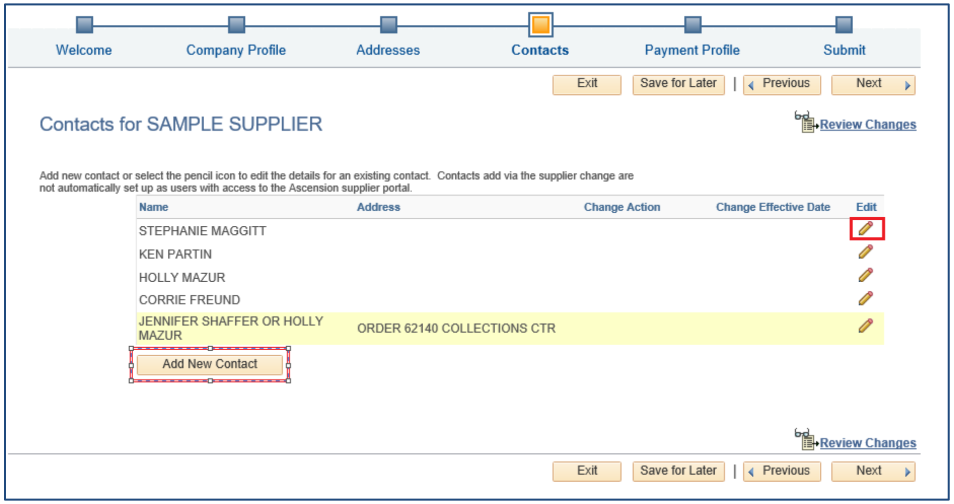
Add Phone

Approved Changes Take Effect: Approval Date / Future Date

OK Cancel

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.



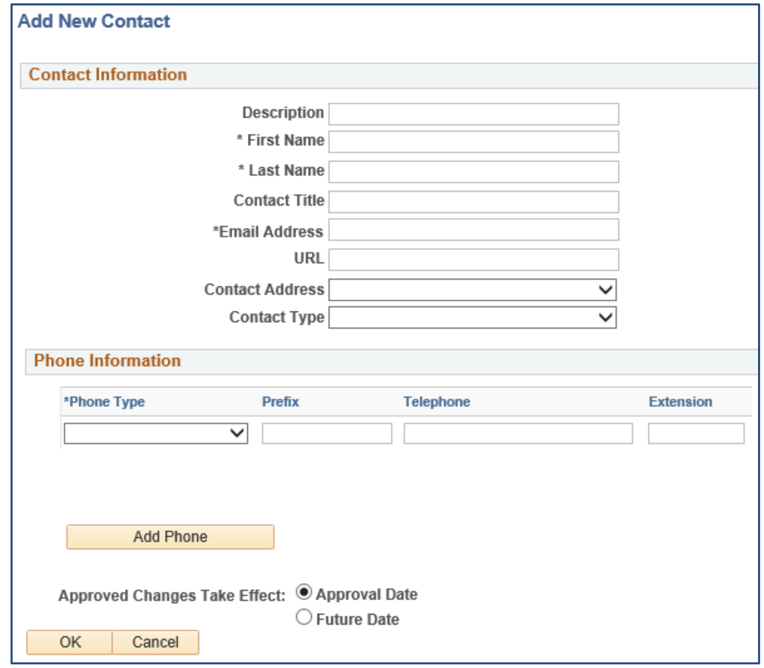
25. To add a new contact, click the **Add New Contact** button.

   a. Complete the **Contact Information** section. **Note:** The first and last name and email address for the contact are required.

   b. Complete the **Phone Information** section. To add additional phone contacts, click the **Add Phone** button.

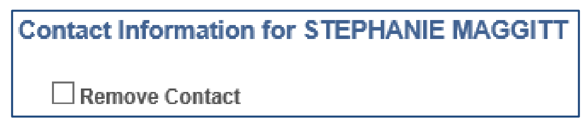
   c. Indicate if the approved change should take effect on the approval date or on a different future date.

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



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.



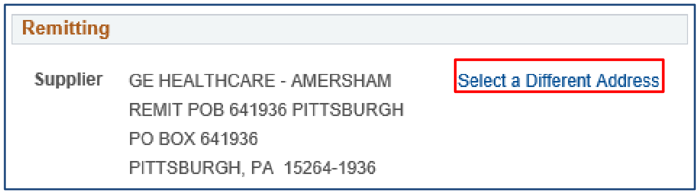
28. Click the **Next** button to progress to the next trainstop.

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

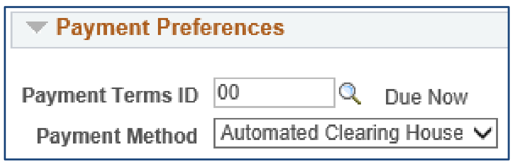
30. Click the pencil icon to edit the MAIN location for your company.

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.



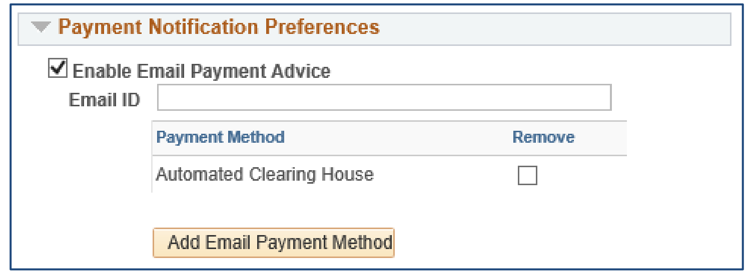
33. To request to update your payment terms, click the magnifying glass under **Payment Preferences** and select the appropriate option from the pop-out window. **Please note:** Additional approvals may be required for updates to payment terms. Payment terms must be consistent with what is indicated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



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.

    a. If you request to update your payment method to ACH, check the box to **Enable Email Payment Advice** under the **Payment Notification Preferences** section.

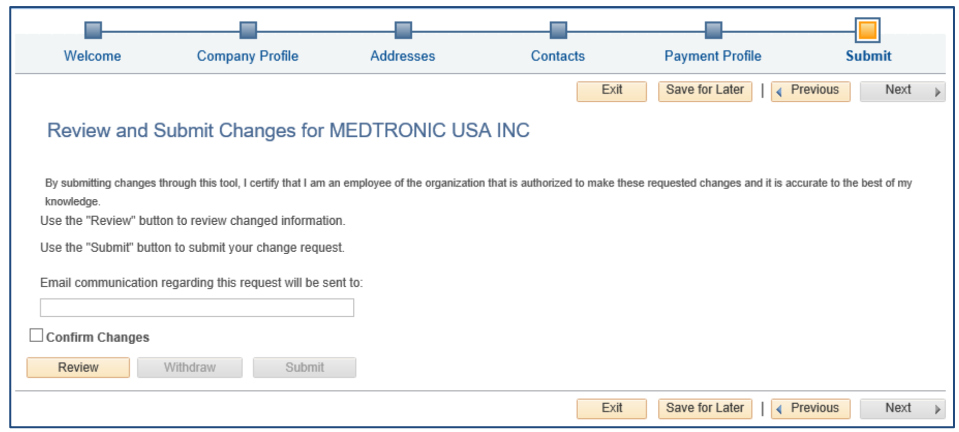
    b. Enter the email address you wish to receive payment notifications to in the **Email ID** field.



    c. 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.

    d. Please do not add any attachments to this section.

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



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

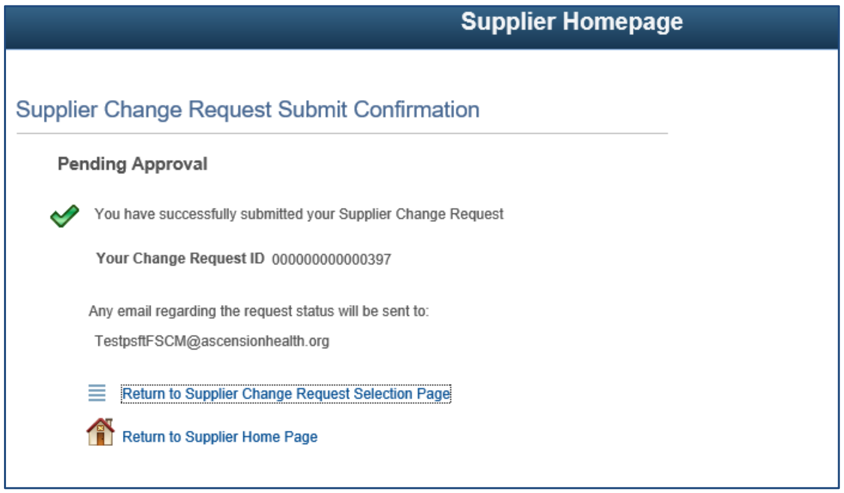
    a. Click the **Review** button to review information related to your change request.

    b. 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.