Overview of the Supplier Create Process

October 2025



MONTCLAIR STATE UNIVERSITY

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Supplier Create Group Informational Items

- The supplier create group enters approximately 2,000 new suppliers and 1200 supplier updates a year.
- As of FY24, there are over 12,800+ active suppliers in Workday.
- Before the inception of the Workday supplier request in July 2023, the process allowed unsolicited supplier requests directly from the supplier. Workday supplier request provides a more controlled management of supplier entry directly from the campus end user that has a relationship with the supplier.
- Before the supplier specialists create your supplier, they review your Workday entry as well as verify compliance with three regulatory databases:
  - Sanctions List Search (OFAC)
  - HHS OIG Exclusions List
  - Consolidated Debarment Report.

Supplier Request - Required Forms

Prior to entering a supplier request into Workday, the Department initiating the goods or services is responsible for collecting a **legible** Supplier Create Form and W-9 Form for domestic suppliers (W-8 Form for international suppliers) from the supplier before submitting it through Workday.

These digital forms are located on the Supplier Onboarding & Maintenance page of the Procurement Services website.

Find Suppliers in Workday



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New Supplier or Supplier Update?

"Find Suppliers" in Workday

The first step is to determine if the supplier is in Workday. This will help identify if you are requesting a new supplier, a supplier update, or if no change is needed! To help with this process, the first step should be to collect an up-to-date W-9 Form from the supplier.

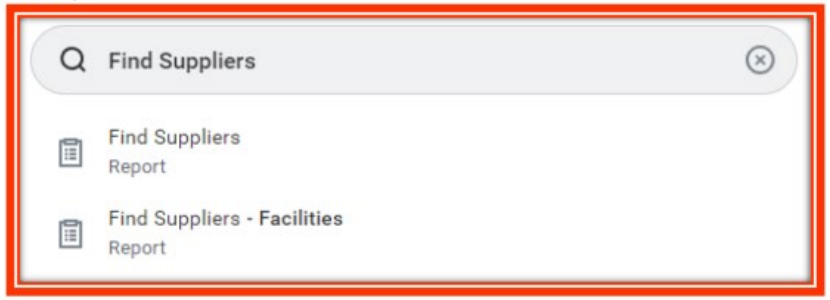
Once an updated W-9 Form has been obtained, log into Workday and run "Find Suppliers" to determine if the supplier is in Workday.



This Request Is To Add a New Supplier To Workday

Please ensure the information in the supplier form and W9 are legible particularly names, addresses, banking information and Tax ID#'s.

1. Log into Workday and run **Find Supplier** to ensure that the supplier is not in Workday.



New Supplier or Supplier Update?

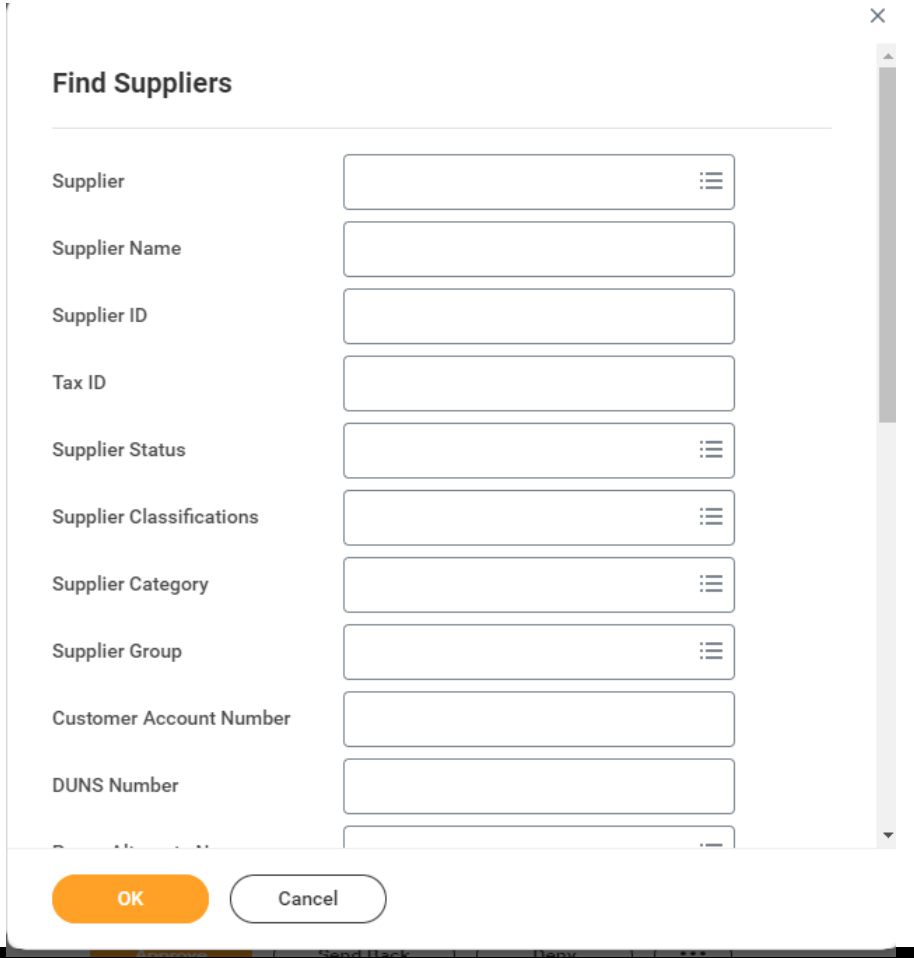
"Find Suppliers" in Workday (cont.)

Proceed to search for the supplier by:

1. Name; **or**
2. TIN (Tax Identification Number)

New Supplier: If there is no match on the Name or TIN, a "Create Supplier Request" should be entered when the Supplier Create Form and W-9 Form for domestic suppliers (W-8 Form for international suppliers) have been collected.

Supplier Update: If both the name and TIN (or just the TIN) match, a "Create Request →Supplier Update" should be entered to update the existing supplier file with the updated Supplier Create Form (and W-9 or W-8 Form in some cases), if an update is needed.



“Find Suppliers” in Workday
Compliance Items

When you identify the supplier in question, you can locate the following items and other relevant information:

- Supplier ID
- Supplier Name
- Supplier Status (Active, Inactive)
- Supplier Address and Remit-To
- Supplier Contacts
- Payment Type (ACH)
- Purchase Order Issuance (Print or Email) and PO Issue Email
- Compliance Items within Workday (BRC, C51, etc.)

Supplier Create Form



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Supplier Create Form

All sections are to be completed for new suppliers, and suppliers requesting an update on a TAX ID # or banking as referenced in the instructions.

Here are some important details that will ensure your request is not returned for revisions.

1. Supplier Name* should be legible and clearly referenced.
2. Federal Tax ID & Social Security # are nine digits.
3. Point of Contact info is where your purchase orders are dispatched via email (preferred method).
4. Remit to Information is where payment is sent.
5. Address on W9 or W8 is for Tax reporting.



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SUPPLIER CREATE FORM

New Supplier ☐ Supplier Update ☐

Domestic and international suppliers must complete this form and provide it to the Using Department at Montclair State University that is initiating the goods or services. A W-9, or W-8 if an international supplier, is required for new supplier entries and any updates to remittance information for existing supplier files. The completed Supplier Create Forms, W-9 or W-8BEN, and other pertinent compliance documents must be submitted by the Using Department via Workday through the "Create Supplier Request" or "Create Supplier Update".

For a **New Supplier**, all information must be completed. For **Supplier Update**, please indicate the change being requested and update that information. If the Supplier Federal Tax ID and / or Banking Information is being updated, the entire form must be completed:

Order From Address ☐ Remit To Address ☐ Phone ☐ Email Address ☐ Point of Contact ☐ Banking ☐ Certificates ☐ Other ☐ Specify:

Supplier Name: *	Supplier Federal Tax ID No. or Social Security No.*
Name used by IRS (if different from above):	
Description of services being offered:	If health care related goods or devices to be provided, please check this box ☐

PAYMENT TYPE (Check all that apply)

Automated Clearing House (ACH) ☐ Domestic US Bank Only	Check ☐	Wire Transfer Payment ☐ International Suppliers Only

CONTACT INFORMATION

Point of Contact Name (Default): *		
Purchase Order Email Address: *		
Order From Address: *		
Phone: *		Fax: *
City: *	State: *	Zip Code: *
Country: *		Foreign Province (If Applicable):
Web Address (if applicable):		

Supplier Create Form
Settlement Bank Accounts

Banking information will be entered for domestic suppliers only. Payment to International Suppliers will be handled outside of Workday. If an international supplier has United States banking information, it will be added to the file.

- US bank account numbers typically consist of 8 to 12 digits but its length could vary from one bank to another. The supplier should verify with their financial institution.
- Routing numbers are always nine digits.

SETTLEMENT BANK ACCOUNT (Montclair State University issues payment to suppliers by ACH or Check for United States banks only. International suppliers are paid by wire transfers only).
Supplier Name on Bank Account: *
Bank Name: *
Bank Account Number: *
ACH/ EFT Routing Number (9 Digits Required): *

Supplier Create Form
Acceptance of T&C's

Acknowledgment and Acceptance of the University's Standard Contract Terms and Conditions – We request suppliers sign to indicate acceptance of the Montclair State University Standard Contract Terms and Conditions.

By signing this form, you acknowledge that you have read and agree to the University's standard contract terms and conditions at https://www.montclair.edu/procurement/supplier-information/ under the link titled "Montclair State University Terms and Conditions."

Grant Subrecipients do not need to sign this form.

Signature_____ **Date:**_____

Name:_____ **Title:**_____

Completed Supplier Create Update forms must be sent to the Using Department at Montclair State University initiating the goods or services. The Using Department will route the forms through Workday for Procurement Services Supplier Create Group's review. The Supplier Create Group will not review Supplier Create forms not routed through Workday by the Using Department. You may also submit proof of your State of New Jersey compliance documentation, e.g., Business Registration Certificate, Chapter 51, Certificate of Employee Information Report, or SBE/MBE/WBE/VBE/SDVOB. Invoices are to be submitted to invoices@montclair.edu.

New Supplier Request
& Supplier Update in Workday



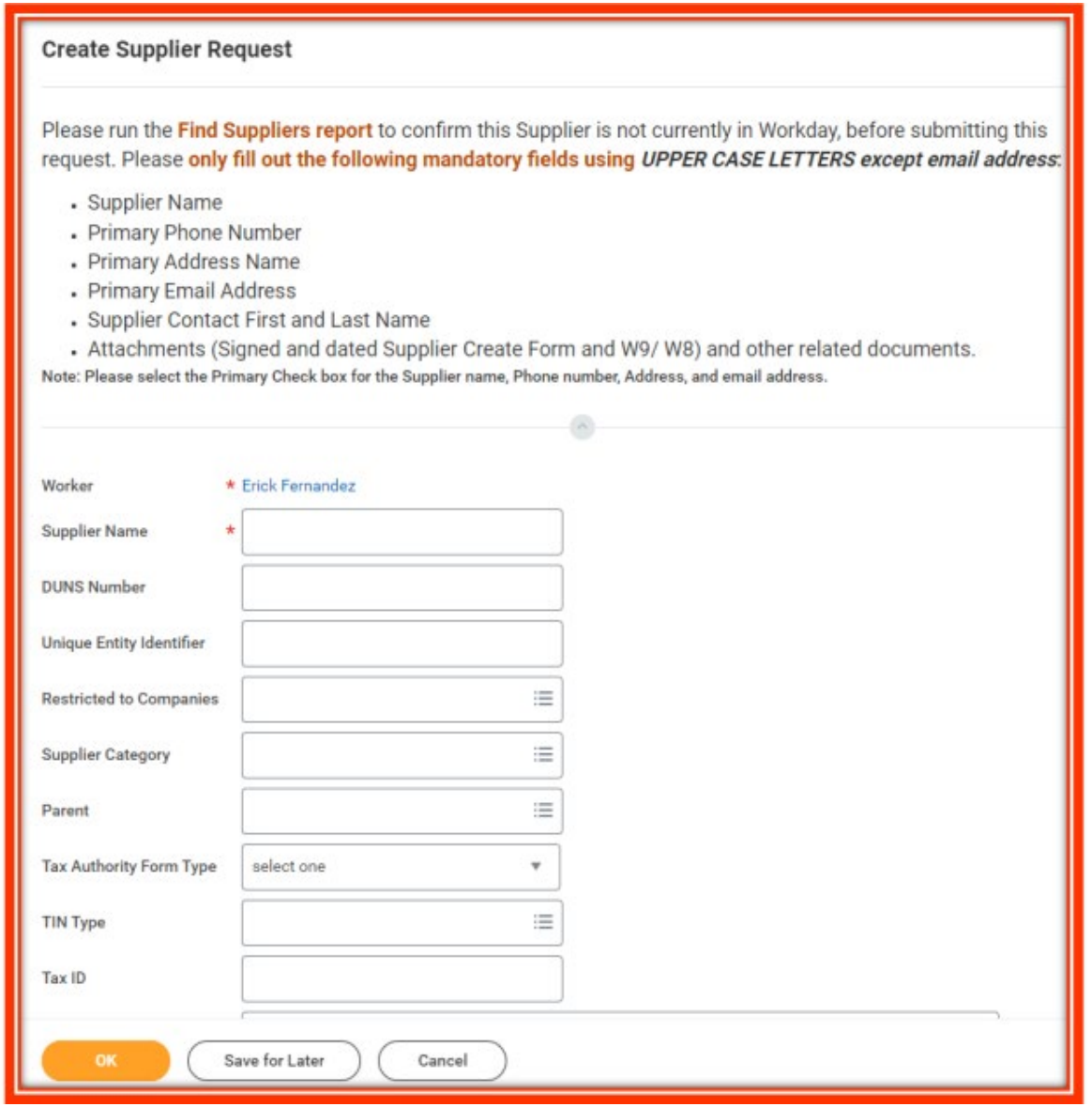
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New Supplier Workday Process

"Create Supplier Request"

Once you have verified that the supplier does not exist in Workday, you are ready to enter the supplier's contact information and indicate the services being provided.

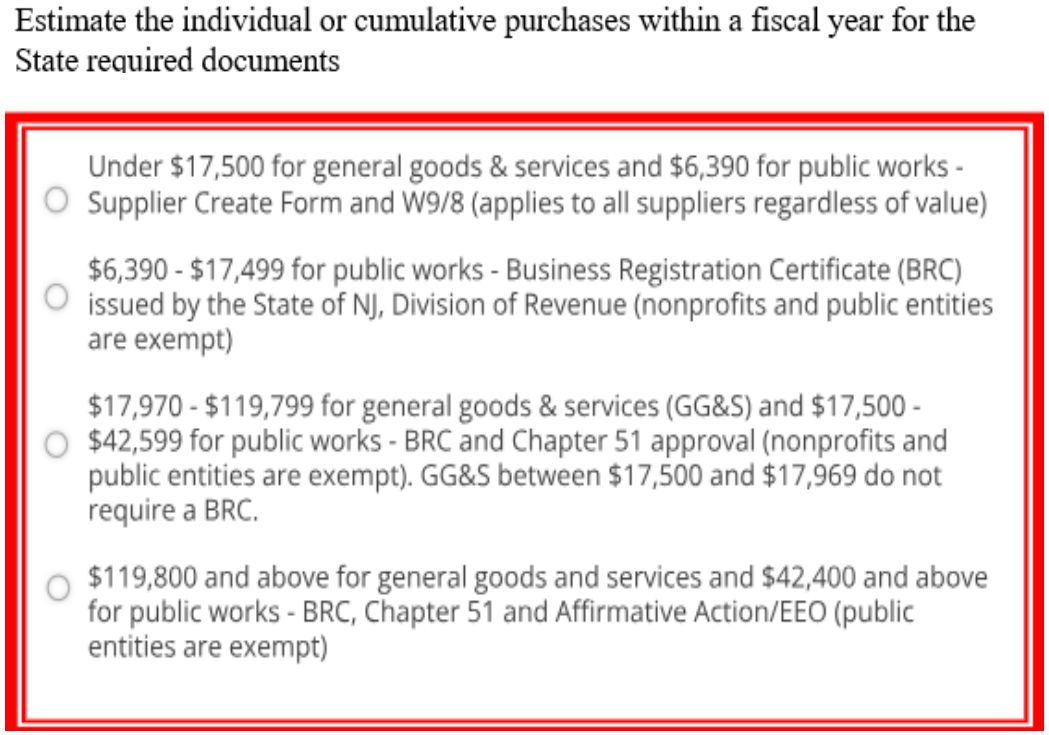
The Create Supplier / Update Request Job Aid can be referenced to assist with this process.



“Create Supplier Request”
Procurement Guidelines

One of the requirements during the supplier create request process is to estimate the individual or cumulative purchases within a fiscal year.

**Your requisition may be returned for collection of these state-mandated compliance items if they are not collected and included at the time of your supplier request. These should be collected upfront to avoid delays during the requisition process.*

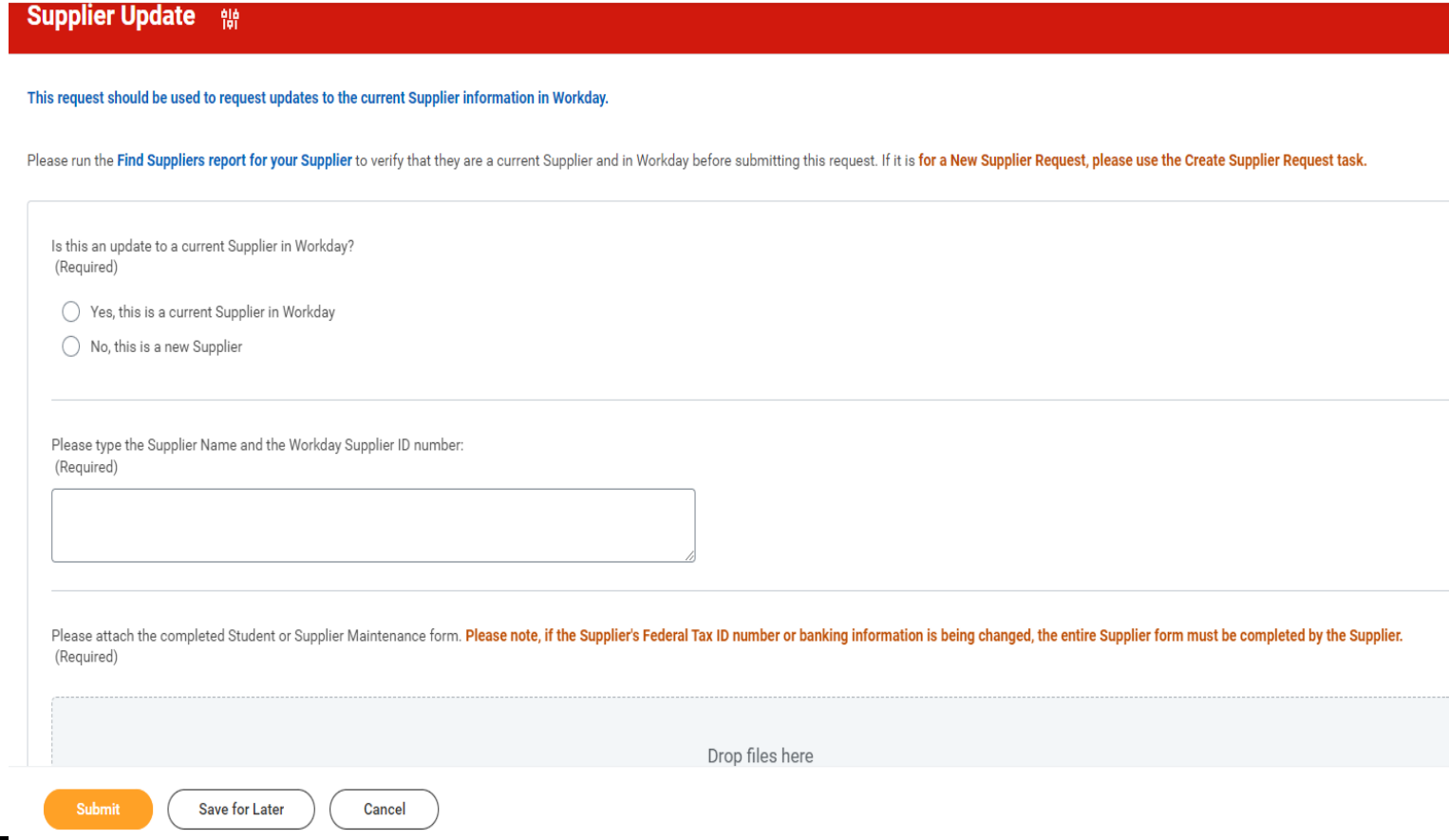


Supplier Update

"Create Request → Supplier Update" in Workday

For supplier updates that include banking, remittance address and contact information, the supplier specialist must positively confirm with the supplier's point of contact via verbal and email.

This process is to protect both the supplier and the University against fraud or identity theft.



Compliance Items



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Compliance Items

Business Registration Certificate (BRC)*: New Jersey Business Registration is required for cumulative purchases greater than 15% above the public bid threshold (threshold of $17,970 for general goods & services and $6,390 for prevailing wage services)

- Suppliers are required to be registered with the Division of Revenue with the Department of the Treasury within the State of New Jersey in accordance with New Jersey statute N.J.S.A. 52:32-44(b) prior to the award of a contract. This is a 2-step process. Please refer to the "New Jersey Business Registration Certificate (BRC) Instructions & Sample" on our Forms page for additional information.

Two-Year Chapter 51 Political Contribution (C51)*: To be eligible for an award, a supplier must comply with N.J.S.A. 19:44A-20.13-20.25 with the intent to prevent improper influence, purchase access or the appearance thereof. (threshold of $17,500)

- The Chapter 51 form should be provided by the supplier and returned to the Procurement Services Department. Procurement Services will review the submittal and send it to the Chapter 51 Department within the New Jersey Division of Purchase and Property for formal approval.

Non-profit and public entities are exempt from BRC and C51

Compliance Items (cont.)

Affirmative Action: Suppliers must provide evidence of EEO/AA requirements, which is typically done by providing a Certificate of Employee Information Report (threshold of $119,800 for general goods and services and $42,400 for prevailing wage services)

- For goods and services, if the supplier is not in possession of a Certificate of Employee Information Report (or evidence under an existing federally approved AA program), an Employee Information Report (Form AA302) with the $150.00 fee to the NJ Department of the Treasury must be submitted to obtain a New Jersey Certificate of Employee Information Report.
  - Highly recommended that this be submitted electronically through **https://cform.mwg.nj.gov/**. Please also see the **submittal instructions** and **creating a login instructions**.
  - An alternative option is that Form AA302 (instructions) and the $150.00 fee to the NJ Department of the Treasury can be mailed in with a copy of both going to Montclair State University by email.
- For construction services, AA201 and AA101 forms are utilized instead

New Jersey Public Works Registered Contractors: Suppliers must be a New Jersey Public Works Registered Contractors for public works projects in accordance with the New Jersey State Prevailing Wage Act and Regulations, N.J.S.A. 34:11-56.25 et seq. (threshold is typically $2,000)

Compliance Items (cont.)

***Proof of these compliance items should be uploaded with your Supplier Request or Supplier Update* so that we have a record of these items in the supplier file in Workday.**

Other Supplier Documents of Note:

- **Suppliers are encouraged to enroll in NJSTART, the State of New Jersey's eProcurement portal!**
  - This is helpful as it allows us to easily see what certifications the supplier already has, which can speed up the purchasing process.
- **Montclair State University College Tax Exempt Letter** from the New Jersey Division of Taxation advises of Montclair's Tax-Exempt Status.
  - This should be provided to suppliers to ensure the University is not taxed for any goods or services.

You will find information on all of these items as well as other information about the supplier process at https://inside.montclair.edu/administration/procurement-services/supplier-information

Questions?