

Workday@Yale
Yale Law School Edition
Creating a Supplier Request

Step #	Step Description
1.	From your Home Screen , Click on your Favorites Worklet
2.	Under Actions , Click on Create Supplier Request
2.a	You are also able to Search Create Supplier Request in Search Bar for access
	<i>Notice Links to Forms are located at the top of the Screen</i>
3.	Your Name will be listed first as Worker
4.	Enter the Supplier Name in ALL CAPS
5.	DUNS Number is REQUIRED for Sub-Awards Suppliers (9 digits) only; Leave blank if not applicable
6.	For Supplier Category , choose the most qualifying category
7.	Parent can be left blank
8.	Tax Authority Form Type should only be Entered if the TAX ID has been Entered
	<i>For the Tax Authority Form Type, Enter the following: Foreign Supplier select 1042-S US Individual or US Reportable Entity select 1099-MISC US Non-Profit or Not Reportable Entity Leave Blank</i>
9.	TIN Type should only be Entered if TAX ID is Entered; EIN for a Business, SSN for an Individual
	<i>W-9s are REQUIRED for payments to Individuals or Businesses in the United States (W-9s are NOT REQUIRED for Reimbursements) W-8BENs are REQUIRED for payments to Foreign Individuals W-8BEN-Es are REQUIRED for payments to Foreign Businesses (See Step 14 for Attachment Guidelines)</i>
10.	Enter TAX ID if available; Workday will verify if Supplier already exists or not
11.	Justification is Required
	<i>Justification should indicate Business Purpose for Supplier and any department systems; For Example, reimbursement, foreign, goods/services, facilities. To have the Supplier added to SciQuest, include the Purchase Order Distribution email address or fax number Scroll Down to Contact Information, Classification, and Attachments Section to Enter the following:</i>
12.	In the Contact Information tab, at Least ONE Contact Field is required and must be completed; the minimum contact

	information required by the Business Office is the Supplier's Address and Phone Number or Email
13.	Ignore the Classification tab
14.	In the Attachments tab, Click Select Files and add all documentation you have for the Supplier (Tax Forms, Business Forms, ACH Forms);
15.	Click the green OK button at the bottom of the screen to complete your request
16.	Next Screen shows Up Next, which will display your Name and requires your Action
17.	Click Complete Questionnaire ; Answer Questions regarding Supplier to the best of your ability
18.	Click Submit at the bottom of the page
19.	Click Done on the next Workday screen
<i>Once your request has been Submitted, Shared Services will Review; The Status of your request can be found by Searching "My Supplier Requests" in the Workday Search Box</i>	
<i>Your request will either be Approved and Added or Denied with a Request for Additional Information; If Denied, you will be Contacted by Shared Services through your Workday Inbox</i>	
<i>Once your request has been Approved, you will be able to complete transactions for the Supplier</i>	
<i>To make Supplier Changes; Send an email with supporting documentation and completed form to supplierchange@yale.edu</i>	