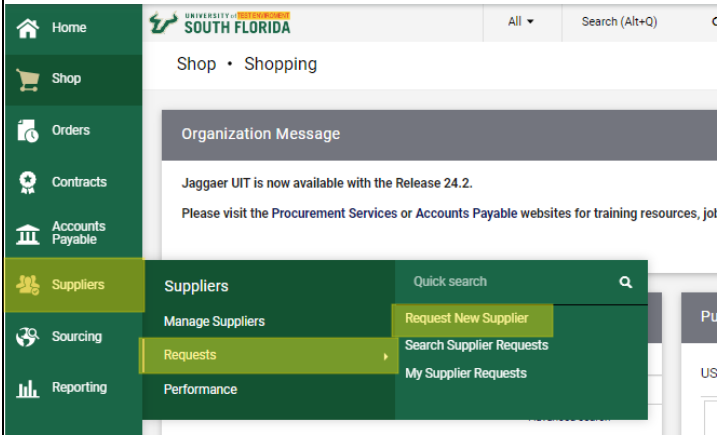


| | |
|--------------------|---|
| Purpose: | Below are instructions for completing your New Supplier Request |
| Navigation: | Navigate in Bull Marketplace to Suppliers > Requests > Request New Supplier |
| Notes: | <p>In order to access the request form, you must have a REQUESTOR or APPROVER role.</p> <p>Before Starting, please search our Supplier Database to make sure this supplier has not already been setup or to see if another already established supplier can provide the goods/services you need.</p> <p>REQUIRED INFORMATION please have available the following:</p> <ol style="list-style-type: none"> 1. Supplier Full Legal Name 2. Full Address including country of origin 3. Supplier Legal Structure <ol style="list-style-type: none"> a. If the supplier is an individual/sole-proprietor or non-resident alien (NRA), then you will be required to provide additional information to define the relationship between USF and the supplier. b. If the supplier is a non-resident alien you will be asked to provide the location of work and any travel dates to the USA. c. If the supplier is a current USF employee you will asked to provide eDisclosure information. <p>SUPPLIER RESOURCES: please provide the supplier with the following to help them to complete their profile.</p> <p>Supplier Registration Guide - for corporations/gov entities and non-resident aliens Individual Registration Guide - for individuals/sole-proprietor</p> |
| JUMP TO: | <ol style="list-style-type: none"> 1. NON-RESIDENT ALIEN REVIEW 2. INDEPENDENT CONTRACTOR REVIEW 3. MONITORING REQUESTS 4. SEARCHING FOR SUPPLIERS |

REQUESTING A NEW SUPPLIER

1 In Bull Marketplace navigate to the New Supplier Request.



The screenshot shows the Bull Marketplace interface. On the left is a dark green navigation sidebar with icons for Home, Shop, Orders, Contracts, Accounts Payable, Suppliers, Sourcing, and Reporting. The 'Suppliers' menu item is highlighted in yellow. A dropdown menu is open for 'Suppliers', showing options: 'Manage Suppliers', 'Requests', and 'Performance'. The 'Requests' option is also highlighted in yellow, and its own dropdown menu is visible, containing 'Request New Supplier', 'Search Supplier Requests', and 'My Supplier Requests'. The 'Request New Supplier' option is highlighted in yellow. The top of the page shows the University of South Florida logo, a search bar, and a language selector set to 'All'.

2 Enter the supplier's name.
Please use the Supplier's Complete Legal name

3 The instructions will appear. Review and then select Next.

****PLEASE TAKE THE TIME TO READ AND REVIEW ALL INSTRUCTIONS PRIOR TO PROCEEDING AS INSTRUCTIONS ARE SUBJECT TO CHANGE****

4 On the Questions page select Next.

5 General Information is collected for ALL Supplier Requests regardless of the Supplier Legal Structure or the Relationship with USF. Scroll down to see the entire form as you fill in the information. You cannot submit until all the fields with a star are completed. Then hit "SAVE" and "NEXT".

The screenshot shows a web application interface for a 'New Supplier Request'. The user is 'Rocky T. Bull'. The form is titled 'Questions - General Information'. On the left sidebar, there are navigation options: 'Template Draft Supplier Request/Foreign Tax Request Status Incomplete', 'Instructions', 'Questions' (checked), 'General Information' (checked), 'Supplier Contact Informat...' (checked), 'Requester Contact Inform...', 'Review and Complete', and 'Supplier Request Workflow'. The main content area has a header 'Questions - General Information' with 'Print Request | History | ?' on the right. Below the header, there is a blue notification bar: 'Potential matching suppliers have been found in your network based on information given. Click here to view the list of potential matching suppliers.' Underneath, there is a section 'On This Page' with 'General Information (12)' and 'FCOE Compliance Review (4)'. The 'General Information' section contains several fields: 'USF Department Name *' (empty), 'Supplier Name *' (filled with 'Rocky T. Bull'), 'Doing Business As (DBA)' (empty), 'Is the supplier a foreign company, entity or individual? *' (radio buttons for 'Yes' and 'No'), 'Country of Origin *' (dropdown menu), and 'Brief description of the Product and/or Service to be provided by the supplier *' (text area with '2000 characters remaining'). A yellow callout box next to the text area says: 'Please be concise but clear, avoiding technical jargon, regarding what service or goods the supplier will be providing and for what anticipated time period'. Below this are two more questions: 'Is the supplier required for a Bull Marketplace Contract Request? *' (radio buttons for 'Yes' and 'No') and 'Is the supplier a current student at USF? *' (radio buttons for 'Yes' and 'No'). Another yellow callout box next to the 'What is the method of payment? *' dropdown says: 'This question helps to determine the type of profile we will ask the suppliers to create.' At the bottom, there is a section for 'FCOE Compliance Review' with a '★ Required' label. The bottom navigation bar has 'Previous', 'Save Progress', and 'Next' buttons.

5A

Depending on your answer to the “Method of Payment” question you may be asked to provide additional information on the employment status or legal structure of the supplier.

Selecting any option other than “Gov Entity, Corporation Partnership, LLC, Tax Exempt” will open section of the Supplier Request form which must be complete.

It is a violation of IRS Tax Law to incorrectly classify a potential Supplier.

Your Supplier can provide you with this information. Departments should not request W9’s from Suppliers.



| Rocky T. Bull | |
|--------------------------------------|---------------------------|
| Template | Draft Supplier Request/IC |
| Request Status | Incomplete |
| Instructions | |
| Questions | ✓ |
| General Information | ✓ |
| Supplier Contact Informa... ✓ | |
| Non-Resident Alien Review | ✓ |
| Independent Contractor R... | ✓ |
| Requester Contact Inform... | |
| Review and Complete | |
| Supplier Request Workflow | |

What is the method of payment? *

Purchase Order

Supplier Legal Structure *

Gov Entity, Corporation, Partnership, LLC, Tax Exempt
Individual/Sole Proprietor
Non-Resident Alien (NRA)

The following section ensures a compliance review has been completed by the Office of the State Auditor, Florida Code of Ethics for Public Officers and Employees - Compliance and D...

What is the method of payment? *

Payment Request Form

Is the supplier a former or current employee of USF? *

Neither Current Employee Former Employee

Supplier Legal Structure *

Gov Entity, Corporation, Partnership, LLC, Tax Exempt
Non-Resident Alien (NRA)
Individual/Sole Proprietor

The following section ensures a compliance review has been completed by the Office of the State Auditor, Florida Code of Ethics for Public Officers and Employees - Compliance and D...

What is the method of payment? *

Non-AP(e.g. via PCard, DSO, Contract Only or other non-AP processing)

Supplier Legal Structure *

Gov Entity, Corporation, Partnership, LLC, Tax Exempt
Individual/Sole Proprietor
Non-Resident Alien (NRA)

The following section ensures a compliance review has been completed by the Office of the State Auditor, Florida Code of Ethics for Public Officers and Employees - Compliance and D...

5B Florida Statute 112.313(3) outlines guidance for conducting business with one’s employment agency. Some exemptions may apply but must be reviewed and approved via eDisclose in the form of an FCOE form. To ensure compliance, if your intended supplier is a current USF employee, they must have an approved FCOE form for their business.

▼ FCOE Compliance Review

The following section ensures a compliance review has been completed by the Office of Compliance & Ethics, pursuant to the Florida Code of Ethics (FCOE) and USF Policy 0-027, Florida Code of Ethics for Public Officers, and Employees - Compliance and Disclosure Policy .

Is the intended supplier one or more of the following: a USF Employee; a business entity in which a USF employee, their spouse, or child is an Officer, Partner, Director, or Proprietor; or business entity in which a USF employee, their spouse, or child has a material interest in the business? Material interest is defined as more than five (5) percent of the total assets or capital stock of the intended supplier. *

Yes No

USF Employee Full Name *

USF Employee ID Number (including leading zeros) *

Approved FCOE Disclosure number from the eDisclose system. The disclosure number starts with DISC, followed by 8 digits (e.g., DISC-00001234). *

6 Select Next and complete the supplier contact information. This section will be the same for ALL REQUESTS. This person will receive the invitation to create a supplier profile in the Bull Marketplace system if approved by Supplier Management and other workflow approvers.

Suppliers > Requests > My Supplier Requests

Rocky T. Bull

Template: **Draft Supplier Request/Foreign Tax**

Request Status: **Incomplete**

Instructions

Questions

General Information

Supplier Contact Information

Non-Resident Alien Review

Independent Contractor R...

Requester Contact Inform...

Review and Complete

Supplier Request Workflow

Questions - Supplier Contact Information Print Request | History | ?

3 Potential matching suppliers have been found in your network based on information given. [Click here to view the list of potential matching suppliers.](#)

▼ Supplier Contact Information

First Name *

Last Name *

Email Address *

Phone Number *

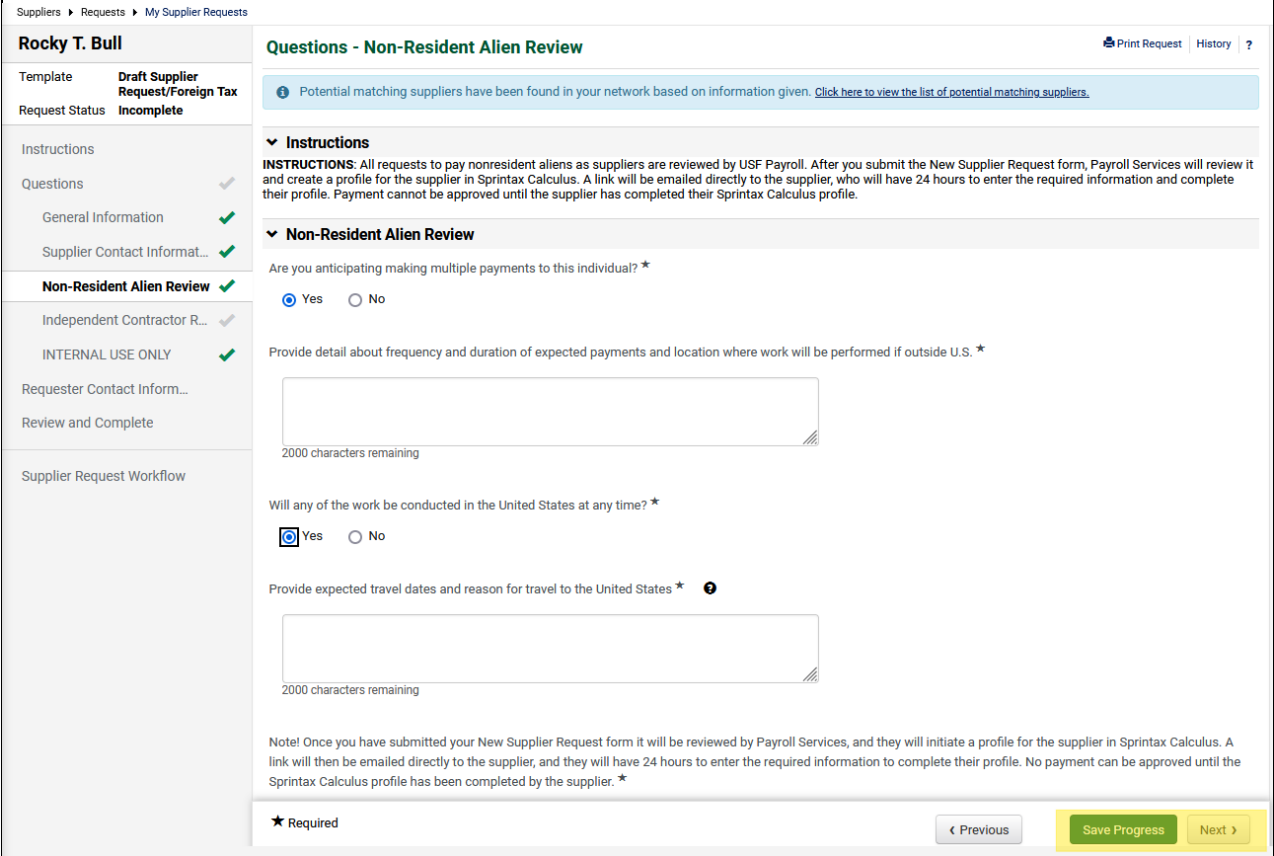
Supplier Address *

2000 characters remaining

Supplier Website URL

★ Required

[← Previous](#) [Save Progress](#) [Next →](#)

| | |
|---|---|
| 7 | <p>NON-RESIDENT ALIEN REVIEW (If Applicable)</p> <p>All requests to pay nonresident aliens as suppliers are reviewed by Payroll. After you submit the New Supplier Request form, Payroll Services will review it and create a profile for the supplier in Sprintax Calculus. A link will be emailed directly to the supplier, who will have 24 hours to enter the required information and complete their profile.</p>  |
|---|---|

| | INDEPENDENT CONTRACTOR REVIEW (If Applicable) |
|---|---|
| 8 | <p>Review completed by Human Resources, with support from Procurement and USF TAS We have incorporated the INDEPENDENT CONTRACTOR WORKSHEET into the Supplier Request Process to drive efficient review and to make the supplier and department experience more streamlined. This section may be completed with support from the supplier, or by someone with knowledge regarding the intended relationship.</p> <p>For an individual to be classified as an independent contractor, the relationship must pass the ABC test:</p> <ul style="list-style-type: none">• Absence of Control: Contractor is free from the control and direction of USF in connection with the performance of the work and has financial risk of loss.• Business of the worker: The contractor performs tasks that are outside the usual course of USF’s business.• Customarily engaged: The contractor is routinely engaged in running an established trade, occupation, or business of the same nature as the work performed for USF. <p>This page is separated into (3) Sections.</p> |

New Supplier Request

▼ Instructions

In order for an individual to be classified as an independent contractor, the relationship must pass the ABC test:

Absence of Control: Contractor is free from the control and direction of USF in connection with the performance of the work and has financial risk of loss.

Business of the worker: The contractor performs tasks that are outside the usual course of USF's business.

Customarily engaged: The contractor is routinely engaged in running an established trade, occupation or business of the same nature as the work performed for USF.

Final determination of Independent Contractor classification will be at the discretion of decisional partnership between USF Human Resources, USF Tax Advisory Services and USF Procurement Services.

▼ Initial Determination That The Payee May Be An Employee

Will the payee supervise any USF employees, Students or other independent contractors paid by USF? *

Yes No

STOP! You have indicated that this relationship may violate the ABC Rule (A) – Absence of Control. It is likely that this individual should be hired as an employee. Please do NOT submit this form. Instead, contact your department HR representative to start the recruitment process. *

Please check this box to acknowledge you understand the above restriction. Please use the back button on your browser to navigate away from this form and delete the form from your pending requests.

Is the payee the primary provider of instructional/teaching/workshop services needed to conduct classes or courses offered by USF, USF Continuing Education or a USF Department or Unit? *

Yes No

Is the payee a Principal Investigator or Co-Principal Investigator on a USF administered grant or a USF project? *

Yes No

Will the payee be supervised by or report directly to a USF employee who has the right to change how the individual does the job? *


Yes No

Does the individual have an established business and/or are providing similar services to customers other than USF? *


Yes No

A YES answer to any of the questions in this section should indicate that the relationship is that of an employee and employer and we recommend consulting with HR before proceeding further. You will be asked to acknowledge this and be provided instructions on how to proceed. All NO responses will be reviewed for accuracy.

▼ General Information

Upload Proof of Business. See Help Text for examples. All documents must be in a single file. * 

No File Attached

Detailed Explanation Of Services To Be Performed. At minimum, must include length of engagement, cost, and description of work sufficient in detail to understand the full scope of services requested. See help text for additional details. * 

2000 characters remaining

Estimated Dates of Service: *

If available, please upload a quote, contract draft, or other documentation which outlines the details of the engagement to support your request.

No File Attached

Proof of business is broadly defined but may consist of: Business registration/Business license, client list, Business card, brochure, website, professional profile, or attestation of professional services when acting in a consultant capacity.

Internal Use only

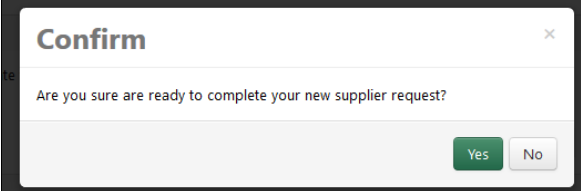
Click next to skip this page. No actions are needed.

Submitting your Request

9 Navigate to the Review and Complete page. Once all required fields are complete you will have all green check marks. Check the certification check box and select Complete Request.

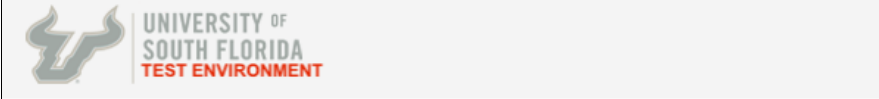
| Section | Progress |
|-------------------------------|----------------------------|
| Instructions | ✓ No Required fields |
| Questions | ✓ Required fields complete |
| General Information | ✓ Required fields complete |
| Supplier Contact Information | ✓ Required fields complete |
| Non-Resident Alien Review | ✓ Required fields complete |
| Independent Contractor Review | ✓ Required fields complete |
| INTERNAL USE ONLY | ✓ Required fields complete |
| Requester Contact Information | ✓ No Required fields |

10 **Confirm submission.**



MONITORING NEW SUPPLIER REQUESTS

1 Notifications will be sent during the supplier registration process to keep you updated. The notification contains a link to take you the request. You must be logged in to Single Sign-On in the browser you will be using Bull Marketplace for the link to work.



RE: Update on supplier requested by you

Dear Corey Kelly,

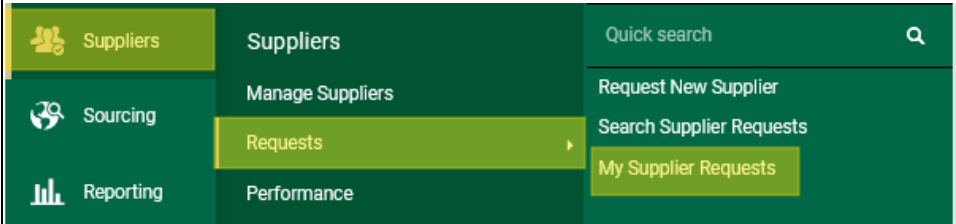
UB FOUR has an update on registration status for University of South Florida. The supplier requested by you is Invited.

To review the request for next steps, click the link below:

[Click here to view the supplier request in your organization's site](#)

Thank You,
University of South Florida

2 Alternatively, In Bull Marketplace navigate to My Supplier Requests.



3 At the top of the page you can filter by supplier name or request status.

The screenshot shows the 'My Supplier Requests' page. At the top, there is a breadcrumb trail: 'Suppliers > Requests > My Supplier Requests'. Below this is a search bar for 'Requested Supplier, Template Name'. A filter section titled 'Filter Supplier Requests' contains several checkboxes: 'Request Status' with options 'Approved', 'Returned', 'Incomplete', 'Under Review' (checked), 'Rejected', and 'Completed'; and 'Include public Supplier request form?' which is unchecked. An 'Apply' button is located below the filters. Below the filters is a table with columns: 'Requested Supplier', 'Template', 'Request Status', 'Workflow Step', 'Workflow Assignee', 'Status Last Updated', 'Created', 'Supplier Profile', and 'Registration Status'. The first row shows 'Rocky T. Bull' as the supplier, 'Draft Supplier Request/ Foreign Tax' as the template, 'Under Review' as the request status, 'Supp Req- Payroll' as the workflow step, and '11/19/2024 8:50 AM' as the status last updated. An 'Actions' dropdown menu is visible at the end of the row.

4 Select a request to review further. On the Supplier Request select Supplier Request Workflow. On this page you can see the active workflow step. This is the step with a double border.

The screenshot shows the 'Supplier Request Workflow' page for 'Rocky T. Bull'. On the left, there is a sidebar with 'Template: Draft Supplier Request/Foreign Tax Under Review' and a list of sections with green checkmarks: 'Instructions', 'Questions', 'General Information', 'Supplier Contact Informat...', 'Non-Resident Alien Review', 'Independent Contractor R...', 'INTERNAL USE ONLY', and 'Requester Contact Inform...'. The main content area displays a flowchart titled 'Supplier Request Workflow'. The steps are: 'Submitted' (11/19/2024 8:50 AM), 'Supp Req-Payroll' (Active, View approvers), 'Supp Req - HR' (Future, View approvers), 'Supp Req-Supp Mgmt' (Future, View approvers), and 'Finish'. The 'Supp Req-Payroll' step is highlighted with a double border, indicating it is the active step.

5 When the request has been fully approved, Supplier Management will send an invitation by email to the supplier requesting that they complete their registration.

The screenshot shows an email titled 'Supplier Invitation for University of South Florida' sent to 'rocky@usf.edu'. The email content includes a greeting 'Dear Rocky T. Bull', an introduction to the University of South Florida's supplier network, and a call to action to 'Register Now'. The email also provides contact information for Supplier Management at 'supplercs@usf.edu'.

6 From the My Supplier Requests page you will also be able to see the status of the supplier’s registration.

| Requested Supplier | Template | Request Status | Workflow Step | Workflow Assignee | Status Last Updated | Created | Supplier Profile | Registration Status |
|--------------------|--|----------------|---------------|-------------------|---------------------|--------------------|------------------|---------------------|
| Rocky T. Bull | Draft Supplier Request/ Foreign Tax | Approved | - | - | 11/19/2024 9:09 AM | 8/20/2024 12:55 PM | Rocky T. Bull | Invited |

7 The Registration Statuses are as follows:

Invited – Invitation to register sent by email to supplier

In Progress – The supplier has started though not submitted their registration


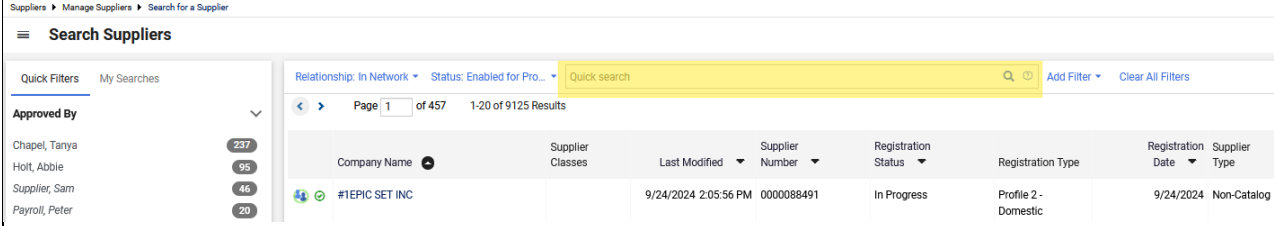
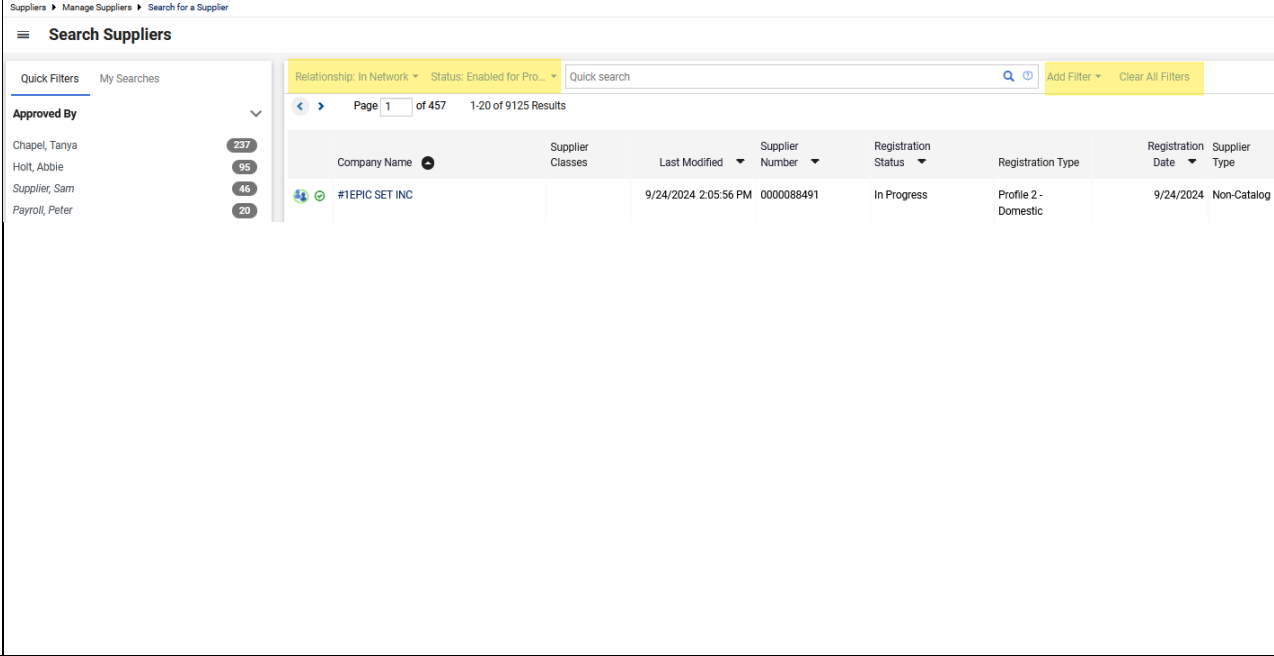
Profile Complete – Supplier has completed their registration and it has been submitted for USF review.

Approved – Supplier registration has been approved through the workflow and is now available for use.

8 To view the Supplier Registration Workflow select the supplier under Supplier Profile and navigate to the Supplier Registration Workflow. On this page you can see the active workflow step. This is the step with a double border.

```

graph LR
    Submitted[Submitted  
11/19/2024 9:22 AM] --> OFAC[OFAC Check  
Completed ✓]
    OFAC --> Duplicate[Duplicate Check  
Active ⌄  
View approvers]
    Duplicate --> TIN[TIN Check  
Future ⇄  
View approvers]
    TIN --> Management[Supplier Management  
Future ⇄  
View approvers]
    Management --> Sync[Sync to ERP  
Future ⇄]
    Sync --> Finish[Finish]
    
```

| | <p>SEARCHING FOR SUPPLIERS</p> | | | | | | | | | | | | | | | | |
|----------------|--|----------------------|------------------|---------------------|----------------------|---------------------|-------------------|-------------------|---------------|----------------|--|----------------------|------------|-------------|----------------------|-----------|-------------|
| <p>1</p> | <p>In Bull Marketplace navigate to Search for a Supplier</p>  | | | | | | | | | | | | | | | | |
| <p>2</p> | <p>Enter the supplier's name and select the search icon.</p>  <p>Suppliers > Manage Suppliers > Search for a Supplier</p> <p>Search Suppliers</p> <p>Quick Filters My Searches Relationship: In Network Status: Enabled for Pro... Quick search Add Filter Clear All Filters</p> <p>Page 1 of 457 1-20 of 9125 Results</p> <table border="1"> <thead> <tr> <th>Company Name</th> <th>Supplier Classes</th> <th>Last Modified</th> <th>Supplier Number</th> <th>Registration Status</th> <th>Registration Type</th> <th>Registration Date</th> <th>Supplier Type</th> </tr> </thead> <tbody> <tr> <td>#1EPIC SET INC</td> <td></td> <td>9/24/2024 2:05:56 PM</td> <td>0000088491</td> <td>In Progress</td> <td>Profile 2 - Domestic</td> <td>9/24/2024</td> <td>Non-Catalog</td> </tr> </tbody> </table> | Company Name | Supplier Classes | Last Modified | Supplier Number | Registration Status | Registration Type | Registration Date | Supplier Type | #1EPIC SET INC | | 9/24/2024 2:05:56 PM | 0000088491 | In Progress | Profile 2 - Domestic | 9/24/2024 | Non-Catalog |
| Company Name | Supplier Classes | Last Modified | Supplier Number | Registration Status | Registration Type | Registration Date | Supplier Type | | | | | | | | | | |
| #1EPIC SET INC | | 9/24/2024 2:05:56 PM | 0000088491 | In Progress | Profile 2 - Domestic | 9/24/2024 | Non-Catalog | | | | | | | | | | |
| <p>3</p> | <p>You may also utilize the filters to search for suppliers by other search criteria.</p>  <p>Suppliers > Manage Suppliers > Search for a Supplier</p> <p>Search Suppliers</p> <p>Quick Filters My Searches Relationship: In Network Status: Enabled for Pro... Quick search Add Filter Clear All Filters</p> <p>Page 1 of 457 1-20 of 9125 Results</p> <table border="1"> <thead> <tr> <th>Company Name</th> <th>Supplier Classes</th> <th>Last Modified</th> <th>Supplier Number</th> <th>Registration Status</th> <th>Registration Type</th> <th>Registration Date</th> <th>Supplier Type</th> </tr> </thead> <tbody> <tr> <td>#1EPIC SET INC</td> <td></td> <td>9/24/2024 2:05:56 PM</td> <td>0000088491</td> <td>In Progress</td> <td>Profile 2 - Domestic</td> <td>9/24/2024</td> <td>Non-Catalog</td> </tr> </tbody> </table> | Company Name | Supplier Classes | Last Modified | Supplier Number | Registration Status | Registration Type | Registration Date | Supplier Type | #1EPIC SET INC | | 9/24/2024 2:05:56 PM | 0000088491 | In Progress | Profile 2 - Domestic | 9/24/2024 | Non-Catalog |
| Company Name | Supplier Classes | Last Modified | Supplier Number | Registration Status | Registration Type | Registration Date | Supplier Type | | | | | | | | | | |
| #1EPIC SET INC | | 9/24/2024 2:05:56 PM | 0000088491 | In Progress | Profile 2 - Domestic | 9/24/2024 | Non-Catalog | | | | | | | | | | |

4

Results will appear and you can see supplier information. Select the supplier name to view additional profile information.

Relationship: In Network Status: Enabled for Pro... ROCKY T. BULL Add Filter Clear All Filters ?

1-3 of 3 Results 50 Per Page

| ... | Company Name | Supplier Classes | Last Modified | Supplier Number | Registration Status | Registration Type | Registration Date | Supplier Type | Duns Number | Diversity Classification |
|-----|---------------|------------------|------------------------|-----------------|---------------------|----------------------|-------------------|---------------|-------------|---|
| ... | ROCKY T. BULL | | 11/19/2024 10:05:13 AM | 0000100355 | Approved | Profile 2 - Domestic | 11/19/2024 | Non-Catalog | | Does Not Qualify as a Small Business or Diverse Supplier (DoesNotQualify) |