



PeopleSoft Financials BOR Form Security

- Each institution's Security Admin will be giving access to the new BOR Form.
 - The role for the BOR Form is BOR_PO_SHARE_SUPPLIER_CREATE.
1. Review W9 and SIF to confirm all required fields are complete.
 2. Before entering a supplier in the BOR Form, please use the 'Review Suppliers' function to determine if the supplier is new or existing.

How to determine if the supplier already exists in SHARE:

- Navigate to Suppliers > Supplier Information > Add/Update > Review Suppliers.
- Enter SHARE for the SETID.
- For ID Type select Tax Identification Number.
- Enter the TIN for the supplier you are updating.
- Click Search. All associated addresses for the supplier will display on the page.
- If you need more info, click on the Actions drop down and select Maintain Supplier.

3. Access the BOR Form using the following pathway:

BOR Form Pathway

Using the PeopleSoft Financials Navigation Bar:

- BOR > Menus > BOR > Supplier > Supplier Onboarding



4. Supplier Onboarding Home Page:
 - a. Select 'Add New Supplier'
 - b. Select 'Add'

Employee Self Service | Supplier Onboarding

Supplier Onboarding

User ID: [Redacted] User's Name [Redacted]

Select an action

☒ Add New Supplier ☐ Resubmit Denied Supplier ☐ View Supplier Status

SetID SHARE
Supplier ID NEW
Add

5. Enter 'Supplier Information'

Supplier Information | Address | Contact | Location

Fields highlighted in yellow, are required fields.

SetID SHARE Transaction ID NEW
Supplier ID NEXT *Supplier Name Donnie's Car Wash
*Supplier Short Name DONNIESCAR Additional Name/DBA dba Car Wash On The Go
*Classification Federal Check for Duplicate
HCM Class
*Persistence Regular
Supplier Status Unapproved Attachments (1)
Additional ID Numbers
Customer SetID SHARE Customer ID

ID Numbers

| Standard ID Qualifier | ID Number |
|-----------------------|-----------|
| TIN | 123456789 |

ID Numbers:

All suppliers, whether TIN or SSN should be entered as TIN.

Classification:

- Select '**Federal**' for a supplier with a TIN.
- Select '**Social Security**' for a supplier with an SSN.
- Select '**International Vendor**' for an International Supplier.



6. Select 'Type of Contractor'

- If the supplier provides a W9, select 'W9 – On File'
- If the supplier provides a W8BEN, Select ' W8BEN – On File'

▼ Government Classifications

Government Sources

*Certification Source E-VERIFY E-Verify Company ID Number

Government Classifications

*Effective Date 07/14/2021 Certification Number 12345

Certificate Begin Date Certificate Expiration

▼ Additional Reporting Elements

Type of Contractor W9 - On File HUBZone Program

Ethnicity

☐ Emerging Small Business
☐ Women-Owned Business
☐ Veteran
☐ Disabled

► Comments & Attachments

Fields highlighted in yellow, are required fields.

7. Using the 'Address' tab, enter the supplier's address information.

Supplier Information Address Contact Location

SetID SHARE
Supplier ID NEXT Short Supplier Name Supplier Name

Supplier Address

Address ID 1
Description SANDERSVILLE - ORDER AND REMIT

Details

Effective Date 07/14/2021 Effective Status Active

Country USA United States

Address 1 123 Main St.

Address 2

Address 3

City Sandersville

County Postal 31082

State GA Georgia

Email ID

Fields highlighted in yellow, are required fields.



8. If necessary, enter 'Payment Alternate Name'

▼ Payment/Withholding Alt Names

Payment Alternate name

| | |
|-------|---|
| DBA 1 | <input type="text" value="Car Wash On The Go"/> |
| DBA 2 | <input type="text"/> |

Withholding Alternate name

| | |
|--------------------|----------------------|
| Withholding Name 1 | <input type="text"/> |
| Withholding Name 2 | <input type="text"/> |

Phone Information:

When entering two or more phone numbers, each phone number must have a different 'Phone Type.'

▼ Phone Information

| <input type="checkbox"/> | <input type="checkbox"/> | | | | | 1-2 of 2 | | View 1 | |
|--------------------------|--------------------------|----------------------|--------------|----------------------|---|----------|--|--------|--|
| *Phone Type | Location | Int'l Prefix | Telephone | Extension | | | | | |
| Business Phone | <input type="text"/> | <input type="text"/> | 478/240-6500 | <input type="text"/> | + | - | | | |
| Main | <input type="text"/> | <input type="text"/> | 18008881563 | <input type="text"/> | + | - | | | |

9. Using the 'Location' tab, enter the supplier's payment method.

- c. Enter 'MAIN' for the first 'Supplier Location'. The second 'Supplier Location' should be named 'REMIT'. All locations 'Description' should be named 'CITY – Supplier Location name'.

Supplier Information Address Contact **Location** *Fields highlighted in yellow, are required fields.*

SetID SHARE

Supplier ID NEXT

Short Supplier Name

Supplier Name

A supplier location is a default set of rules which define how you conduct business with a supplier.

| | | | | |
|--------------------|--------------------------------|--|--------|----------|
| Location | | <input type="text"/> | 1 of 1 | View All |
| *Supplier Location | MAIN | <input checked="" type="checkbox"/> Default Location | | |
| Description | SANDERSVILLE - MAIN BUSINESS L | | | |
| Details | | | | |
| *Effective Date | 07/14/2021 | Effective Status | Active | |
| Payables | | Procurement | 1099 | |

► Approval Comments

Submit



10. Select 'Payables'

- Enter applicable address numbers under 'Invoicing Location' and 'Remitting Location'
- 'Payment Method' will be defaulted to 'Automated Clearing House.' For a check payment, change the selection to 'System Check.'

Fields highlighted in yellow, are required fields.

| Payables Options | |
|--|--|
| SetID | SHARE |
| Supplier ID | NEXT |
| Short Supplier Name | |
| Supplier Name | |
| Location MAIN | |
| Description SANDERSVILLE - MAIN BUSINESS L | |
| Invoicing Location | |
| Supplier | NEXT |
| Address | 1 SANDERSVILLE - ORDER AND REMIT 123 Main St. Sandersville, GA 31082 |
| Location | MAIN SANDERSVILLE - MAIN BUSINESS L |
| Remitting Location | |
| *Supplier | NEXT |
| *Address | 1 SANDERSVILLE - ORDER AND REMIT 123 Main St. Sandersville, GA 31082 |
| Location | MAIN SANDERSVILLE - MAIN BUSINESS L |
| Additional Payables Options | |
| Payment Control | Payment Method |
| Pay Group Code | Payment Method Automated Clearing House |

Bypass bullets c and d, if entering a system check payment.

- For 'Electronic File Options' select the check box beside 'Prenotification Required'
- 'Supplier Bank Account Options' setup:
 - For 'Bank Name,' enter the name of the bank given by the supplier
 - For 'Bank ID Qualifier' enter 01
 - For 'Bank ID' enter the supplier's routing number
 - For 'Bank Account Number' enter the supplier's bank account number
 - For 'DFI Qualifier' enter 01
 - For 'Account Type,' select the type of account given by the supplier
 - For 'DFI ID' enter the supplier's routing number



Fields highlighted in yellow, are required fields.

Payables Options ×

Electronic File Options

Pre-Notification

☒ Prenotification Required

Status

Date

Supplier Bank Account Options

Supplier Bank Accounts Q | 1 of 1 View All

☒ Default Election

+

-

Description

Country USA Q United States

Bank Name Wells Fargo

Branch Name

Bank ID Qualifier 001 Q

Bank ID 9-digit routing number

Bank Account Number Account number

DFI Qualifier 01 Q Transit Number

Account Type Savings

DFI ID 9-digit routing number

e. 'Payment Method' will be defaulted to 'Automated Clearing House.' For a check payment, change the selection to 'System Check.'



▼ Supplier Type Options

Supplier Types

Fields highlighted in yellow, are required fields.

Preferred Language

Options

1-1 of 1 View All

| Primary | *Type | Service Type | | |
|--------------------------|----------------------|----------------------|---|---|
| <input type="checkbox"/> | <input type="text"/> | <input type="text"/> | + | - |

▼ Payment Notification

☒ Enable Email Payment Advice

Email ID oneusgsupport@usg.edu

☐ Enable FG Remittance Advice

Payment Method Selection

1-1 of 1 View All

| | Payment Method | | |
|---|--------------------------|---|---|
| 1 | Automated Clearing House | + | - |

OK

Cancel

11. Select '1099'

- '1099 Withholding Information' should be entered for withholding applicable suppliers. Please use the chart below to determine 'Type' and 'Default Class.'
- '1099 Reporting Information' should be entered for ALL suppliers, whether withholding or not.

Fields highlighted in yellow, are required fields.

Withholding Supplier Information

SetID: SHARE
Supplier ID: NEXT
Short Supplier Name:
Supplier Name:

Location: MAIN
Description: SANDERSVILLE - MAIN BUSINESS L

1099 Options

1099 Withholding Information

Main Information

| *Entity | *Type | *Jurisdiction | Default Jurisdiction | *Default Class | *1099 Status | Withhold Type Description | | |
|---------|-------|---------------|-------------------------------------|----------------|--------------|---------------------------|---|---|
| IRS | 1099N | FED | <input checked="" type="checkbox"/> | 01 | RPT | Reporting Only | + | - |

1099 Reporting Information

Main Information

| *Entity | *Address | Taxpayer Identification Number | | |
|---------|----------|--------------------------------|---|---|
| IRS | | TIN | + | - |

OK Cancel



As determined by the IRS, find the Supplier's Tax Classification to determine Withholding Status and whether the Supplier's Business Type Info should be entered.

| Tax Classification | Withholding Status | Supplier Business Type Info |
|---|---------------------------|------------------------------------|
| Individual/sole proprietorship or single-member LLC | Withholding | Required |
| C Corporation | No Withholding | Not Required |
| S Corporation | No Withholding | Not Required |
| Partnership | Withholding | Required |
| Trust/estate | No Withholding | Not Required |
| LLC taxed as C Corp | No Withholding | Not Required |
| LLC taxed as S Corp | No Withholding | Not Required |
| LLC taxed as Partnership | Withholding | Required |
| Other (501c3, govt, etc.) | Not Withholding | Not Required |
| | | |

| 1099 Question | Mapping |
|---|-----------------------|
| My company is being paid for services as a non-employee of USG (independent contractor) | 1099N Type – Class 01 |
| My company is being paid for awards/prizes | 1099M Type – Class 03 |
| My company is being paid for rent (real estate or machinery) | 1099M Type – Class 01 |
| My company is being paid for fellowship training stipend, or research participant | 1099N Type – Class 01 |
| My company is being paid for honorarium | 1099N Type – Class 01 |
| My company is being paid for short course instructor - professional education | 1099N Type – Class 01 |



| | |
|--|-----------------------|
| My company is being paid for registration | 1099N Type – Class 01 |
| My company is being paid for repairs/maintenance | 1099N Type – Class 01 |
| My company is being paid for expense reimbursement as a non-employee | 1099N Type – Class 01 |
| My company is being paid for royalties | 1099M Type – Class 02 |
| My company is being paid for medical or healthcare services | 1099M Type – Class 06 |
| My company is being paid for legal services | 1099N Type – Class 01 |
| My company is being paid for public speaking or entertainment. | 1099N Type – Class 01 |
| I am providing goods | 1099N Type – Class 01 |
| I am not 1099 reportable | No mapping |

12. 'Submit' Form

Supplier Information

Address

Contact

Location

SetID SHARE

Supplier ID NEXT

Short Supplier Name

Supplier Name

A supplier location is a default set of rules which define how you conduct business with a supplier.

Location

Search

1 of 1

View All

*Supplier Location MAIN

Default Location

+ -

Description SANDERSVILLE - MAIN BUSINESS L

Mouse cursor

Details

Search

1 of 1

View All

*Effective Date 07/14/2021

Effective Status Active

+ -

Payables

Procurement

1099

Approval Comments

Submit



13. SSC will deny the form if information is missing or incorrect. The submitting approver will be notified via Service Request if the form is denied.

- a. To resubmit the form, select 'Resubmit Denied Supplier' on the Supplier Onboarding page.

Supplier Onboarding

User ID: [REDACTED]

Select an action

☐ Add New Supplier ☒ Resubmit Denied Supplier ☐ View Supplier Status

| Transaction ID | SetID | Supplier ID | Name | Short Supplier Name |
|----------------|-------|-------------|---------------|---------------------|
| 1 JY62H17EUF | SHARE | T000000003 | Supplier Name | Short Supplier Name |

Select the 'Transaction Id'

- b. The 'Comments & Attachments' section will provide an explanation of denial.

Supplier Information Address Location

SetID SHARE
Supplier ID T000000006
Supplier Short Name MILLEDGEVI
Classification Federal
HCM Class
Persistence Regular
Supplier Status Unapproved

Transaction ID SHNYHPMFPN
Supplier Name [REDACTED]
Additional Name

[Check for Duplicate](#)

[Attachments \(1\)](#)

► Additional ID Numbers
► Government Classifications
► Additional Reporting Elements
▼ Comments & Attachments

Comments

The W9 is missing a signature. Please have the supplier sign the form. Once you have received a signature, please upload the completed form and resubmit.

- c. Update the missing/incorrect information and 'Submit' again.



14. To check the status of a Supplier's BOR Form, select 'View Supplier Status' on the Supplier Onboarding page. All your submissions should be listed with their status.

Supplier Onboarding

User ID:



Select an action

☐ Add New Supplier

☐ Resubmit Denied Supplier

☒ View Supplier Status

Filter

| 1-2 of 2 | | | | | |
|----------|----------------------------|-------|-------------|---------------|---------|
| | Transaction ID | SetID | Supplier ID | Name | Status |
| 1 | JY62H17EUF | SHARE | T000000003 | Supplier Name | Denied |
| 2 | SHNYHPMFNP | SHARE | T000000006 | Supplier Name | Pending |