



Retrieval Name
Vendor Add/Update Policy
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Issue/Rev Date:
 12/01/2008
Originator: Finance
Supercedes: _____

Finance Policies and Procedures

AUTHORITY				
Federal	State Statutes	La. Admin Code	LSU-HSC	HCS D

CITATION:

POLICY NAME: Adding and Updating Vendors in PeopleSoft

PURPOSE: This policy is being promulgated to provide direction and guidelines for adding and updating vendor information in PeopleSoft purposes only.

Policy Statement

It is the policy of the LSU Health Care Services Division to maintain very strict control over how vendors are added and updated in PeopleSoft.

The information entered into the vendor file may be used by any business unit on PeopleSoft documents as long as the vendor status is active. The vendor number that is assigned by PeopleSoft determines where purchase orders, solicitations and checks are sent. Adherence to the standard and format set forth in this policy is critical to ensuring the integrity of the vendor file.

Only HCS D purchasing personnel who are assigned to PeopleSoft LSU_PO_PURBUY2_BUYER2 or LSU_PO_PURBUY3_BUYER3 roles are authorized to add or update vendor information in PeopleSoft.

The individual who has been designated the PeopleSoft purchasing super user at each HCS D business unit is authorized to approve new vendors in PeopleSoft. At the discretion of HCS D Finance Staff, a back up super user may be given the authority to approve new vendors in the absence of the primary super user at some business units. If the need arises to approve a vendor in the absence of the super user or the backup super user, the end user must open a helpdesk ticket in order that HCS D Finance staff or LSUHSC PeopleSoft Support Team may approve the new vendor.

BUSINESS UNIT	Super User	Backup Super User
EKLMC	Lisa Augustus	Roslyn Stroud
HCS DA	Melissa Knox	Dianne Altazin
LAKMC	Margaret McIntyre	None
LJCMC	Vicky Hebert	None
MCLNO	Christopher O'Neil	Carolyn Warner, Sharleen Hicks, Gertrude Ackers
UMCLA	Bonnie Meche	None
WOMMC	Keith Powell	None
WSTMC	Carolyn Stroud	None



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PeopleSoft User Preferences Page for Vendor Processing Authority

Vendor Processing Authority

User: POMORO PETER OMOROTIONMWAN

Vendor Processing Authority

- Authority to Enter
- Authority to Approve
- Authority to Inactivate

Before a new vendor is added to PeopleSoft, the user must perform research to ensure that duplicate vendor records are not added and the information entered is correct.

First, obtain the FEIN or SSN from the vendor, enter the number in the Vendor TIN and click on search.

PeopleSoft Vendor Search Page

Vendor Information

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#)
[Add a New Value](#)

SetID: [=]
 Vendor ID: [begins with]
 Vendor Tin: [begins with]
 Persistence: [=]
 Short Vendor Name: [begins with]
 Our Customer Number: [begins with]
 Name 1: [begins with]
 Default Location: [begins with]
 Include History Correct History Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

Search Results

[View All](#)

SetID	Vendor ID	Vendor Tin	Short Vendor Name	Our Customer Number	Name 1
SHARE	0000001285	362604143	BAXTER- HE-001	(blank)	BAXTER HEALTHCARE CORP



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If the system returns a matching record, there is no need to add a new vendor. However, the user should contact the vendor to verify that the addresses in the system are valid. The user should inactivate the invalid addresses, or open a helpdesk ticket so HCSD Finance staff or LSUHCS PeopleSoft Support may inactivate them.

If a user adds a duplicate vendor, the vendor will be inactivated by HCSD Finance staff or PeopleSoft Support Team.

Any deviations from this policy must have prior written approval from LSU HCSD Finance Section.

If no matching record exists in PeopleSoft for the FEIN or SSN, a new record will need to be added to PeopleSoft.

Vendor File Standard: It is imperative that the information entered into the vendor file is correct and current. Obtain a complete IRS Form W-9 from the vendor. This is critical because the W-9 certifies that the FEIN/SSN provided belongs to the vendor. If the user has access to ISIS, log on to ISIS and search for the vendor record using the FEIN or SSN. The ISIS, the VENC screen print may be used in lieu of IRS Form W-9 if the record for the vendor exists in ISIS. Each business unit must maintain the form W-9 or ISIS screen print in its vendor file.

For consistency, all information must be entered in upper case.

PeopleSoft has been modified to print the data in the fields listed below on purchase orders and checks.

Vendor Name 1: MAXIMUM OF 40 CHARACTERS

Address 1: REQUIRED

Address 2: (Optional)

City: REQUIRED

State: REQUIRED

Postal (zip code): REQUIRED

NOTE: Any information entered in the following fields will not print on the purchase orders or checks.

Vendor Name 2

Address 3

Do not enter any information in these fields.



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Other Critical Vendor Information

ID Numbers Customize Find View All		
Type	SetID	ID Number
TIN <input type="text"/>	<input type="text"/>	999999999 <input type="text"/>

FEIN or SSN (TIN): Must be nine numeric characters; no hyphens.

Parish: Enter the complete and correct spelling of Louisiana parish. DO NOT abbreviate the name of a Louisiana parish unless the parish is named after a saint such as ST JAMES, ST TAMMANY, etc.

Telephone/Fax Numbers: Format must be in the format shown below.

Phone Information Customize		
*Type	Prefix	Telephone
Business <input type="text"/>	<input type="text"/>	225/555-5555
FAX <input type="text"/>	<input type="text"/>	225/555-1111

Maintaining