

Supplier/Payee Enhancements – Rollout Jan 18, 2016

Page or scroll through, choose what you would like to learn about below, or click to see a demo.

Changes to Payee/Supplier Setup Requests: New Process for Foreign Payees

If the payee is a **foreign visitor**, the preparer/requester will be automatically assigned as the Authorized Agent to facilitate Stanford's collection of required and confidential information. The preparer/requester will receive the Secure Portal invitation via email, enabling them to submit confidential and restricted information on the payee's behalf.

New with this release, the foreign visitor payee **will not** receive the Secure Portal invitation. For the setup of new foreign payees, the **preparer/requester** must:

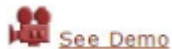
- Coordinate directly with the foreign payee to obtain required confidential information and documents as listed on the Secure Portal invitation email
- Either complete the Secure Portal for the payee (including the upload of confidential documents) or forward the email invitation to the payee, and coordinate with them to complete the portal

Note: It is now the responsibility of the preparer/requester to:

- Work directly with a foreign visitor payee to obtain required confidential information and documents as listed in the Secure Portal invitation email
- Ensure that the Secure Portal is completed

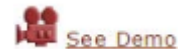
Note: A Secure Portal invitation email will still be sent directly to all domestic visitors/suppliers and foreign business suppliers if an email address is provided in the setup request.

[Changes to Payee/Supplier Setup Requests: Request New Payee/Supplier](#)



- New expense category field for Non-PO Payment/Visitor Reimbursement
- New event/activity location field
- New Residency/Citizenship information radio buttons
- New feature to securely upload attachments


[Changes to the Supplier and Payee Request Portal \(Secure Portal\):](#)

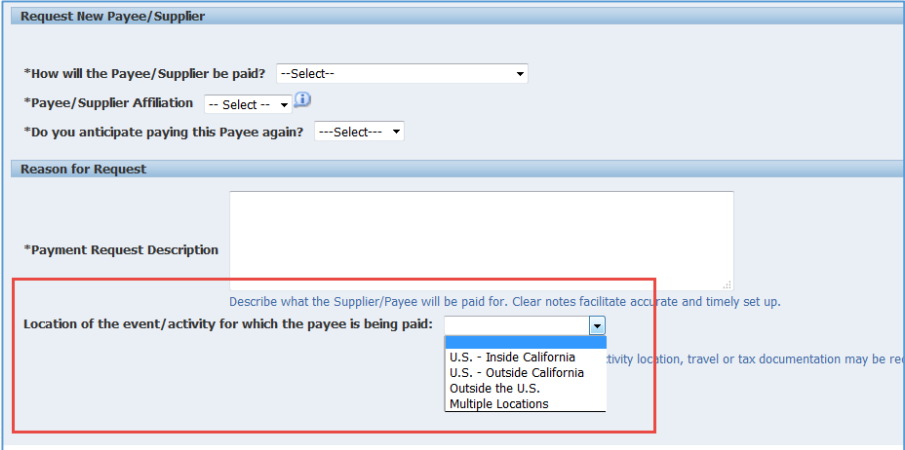
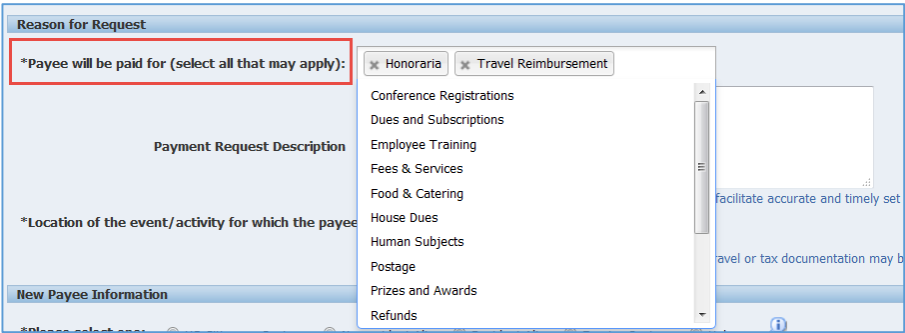


- Location of Business or Residence section has been removed (not included in demo)
- Simplified Tax reporting information section
- Simplified Document Upload

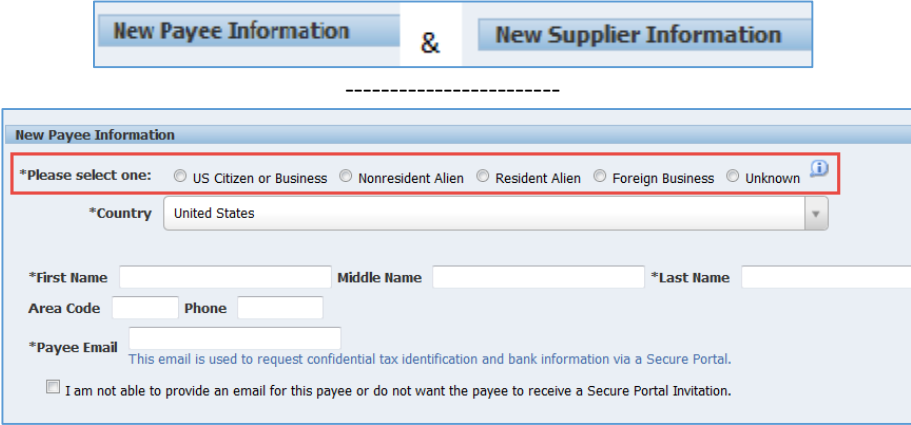
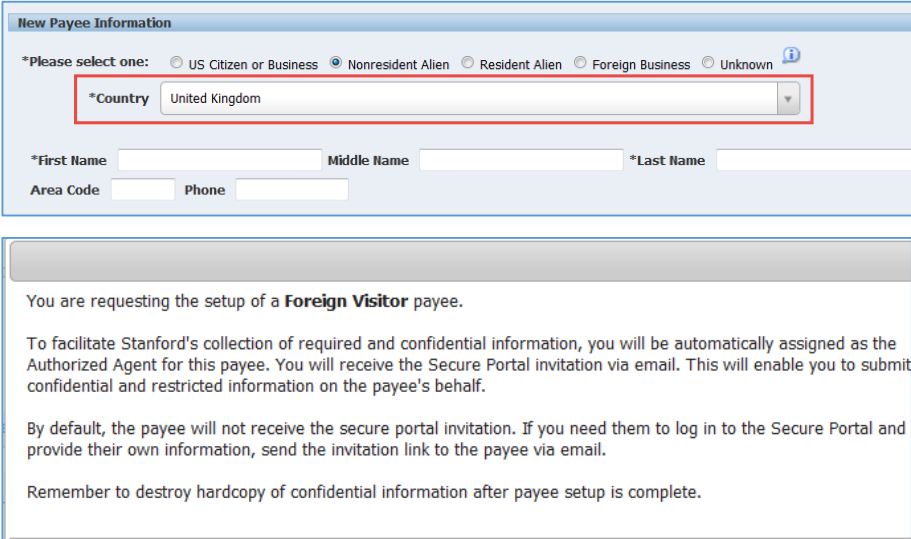
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Changes to Payee/Supplier Setup Requests, and New Process for the setup of Foreign Visitor Payees

Request New Payee/Supplier  [See Demo](#)

New Item/Procedure	Description/Why	System
<p>New Item: Location of the event/activity for which the payee is being paid</p>	<p>This question was added to help Supplier Enablement identify travel or tax documentation required from the payee.</p> <p>Select the best description for the location of the event or activity for which the payee is being paid.</p>	 <p>The screenshot shows the 'Request New Payee/Supplier' form. A red box highlights the dropdown menu for 'Location of the event/activity for which the payee is being paid'. The menu options are: U.S. - Inside California, U.S. - Outside California, Outside the U.S., and Multiple Locations.</p>
<p>New Item: Payment Category</p> <p>New Field Name: Payee will be paid for (select all that may apply)</p>	<p>This field is conditional and will only display when:</p> <p><i>'How will the Payee/Supplier be paid?'</i> selection = <i>Non-PO Payments/Visitor Reimbursement</i></p> <p>Note: Multiple categories can be selected. This list contains all Non-PO Payment categories in the Expense Requests system.</p> <p>For Visitor Reimbursement, select Travel Reimbursement from the list.</p>	 <p>The screenshot shows the 'Reason for Request' form. A red box highlights the multi-select list for '*Payee will be paid for (select all that may apply):'. The list includes: Honoraria, Travel Reimbursement, Conference Registrations, Dues and Subscriptions, Employee Training, Fees & Services, Food & Catering, House Dues, Human Subjects, Postage, Prizes and Awards, and Refunds.</p>

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New Item/Procedure	Description/Why	System
<p>New Item: Residency /Citizenship radio buttons</p> <p>Please Select one:</p> <ul style="list-style-type: none"> ● US Citizen or Business ● Nonresident Alien ● Resident Alien ● Foreign Business ● Unknown 	<p>These radio buttons were added to help Supplier Enablement identify travel or tax documentation required from the payee.</p> <p>The radio buttons will display for both new visitor payees and new suppliers.</p> <p>Nonresident Alien: An individual present in the U.S. on a temporary visa, who is not a tax resident of the U.S., is considered to be a 'Nonresident Alien.' Nonresident aliens have special taxation rules and may be able to claim tax treaty benefits for reduced federal taxation.</p> <p>Resident Alien: Green card holder</p>	 <p>The screenshot shows the 'New Payee Information' form. At the top, there are two tabs: 'New Payee Information' and 'New Supplier Information'. Below the tabs, there is a section titled 'New Payee Information'. A red box highlights the radio button selection area with the text '*Please select one:'. The options are: <input type="radio"/> US Citizen or Business, <input type="radio"/> Nonresident Alien, <input type="radio"/> Resident Alien, <input type="radio"/> Foreign Business, and <input type="radio"/> Unknown. Below this, the '*Country' dropdown menu is set to 'United States'. Other fields include '*First Name', 'Middle Name', '*Last Name', 'Area Code', and 'Phone'. There is also a '*Payee Email' field with a note: 'This email is used to request confidential tax identification and bank information via a Secure Portal.' and a checkbox for 'I am not able to provide an email for this payee or do not want the payee to receive a Secure Portal Invitation.'</p>
<p>New Process: Foreign Visitor Payees</p> <p>New System Behavior: When a request is entered for a foreign visitor payee, the preparer will be designated as the Authorized Agent.</p> <p>A message box will display that explains the new process.</p>	<p>All communication for foreign payees will now be sent to the preparer/requester. This includes the email invitation to update the Secure Portal that is sent by Supplier Enablement.</p> <p>The preparer/requester will now act as the liaison between the foreign visitor payee and the Supplier Enablement team during setup.</p> <p>The preparer/requester will be responsible for:</p> <ul style="list-style-type: none"> ● Completing the Secure Portal on behalf of the payee, if desired, or... ● Forwarding the invitation to the payee, if desired ● Follow-up to assure the payee is providing the necessary information 	 <p>The screenshot shows the 'New Payee Information' form with the '*Country' dropdown set to 'United Kingdom'. Below the form, there is a message box with the following text: 'You are requesting the setup of a Foreign Visitor payee. To facilitate Stanford's collection of required and confidential information, you will be automatically assigned as the Authorized Agent for this payee. You will receive the Secure Portal invitation via email. This will enable you to submit confidential and restricted information on the payee's behalf. By default, the payee will not receive the secure portal invitation. If you need them to log in to the Secure Portal and provide their own information, send the invitation link to the payee via email. Remember to destroy hardcopy of confidential information after payee setup is complete.'</p>

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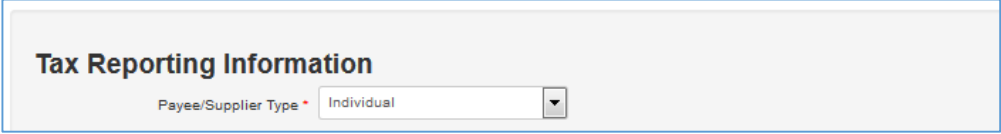
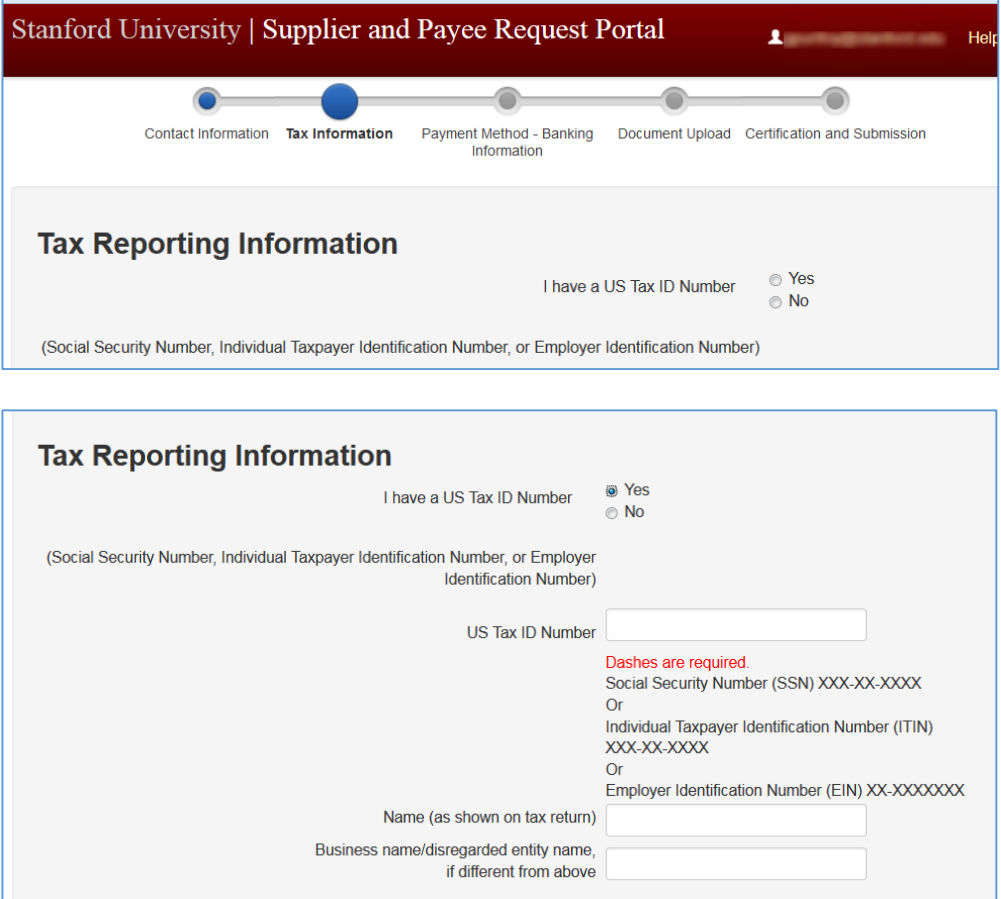
New Item/Procedure	Description/Why	System
<p>New Item: Upload Attachments</p> <p>Note: This field is available for all request types, except Expense Requests generated Wire Payment Requests.</p>	<p>The ability to attach and securely transfer documents to the payee’s database record has been added. Use this feature if you happen to have documents (confidential or not) for the payee at the time of the new payee setup request.</p> <p>Uploading attachments is always optional. If you do upload an attachment, you need to indicate the document type by selecting a value in the dropdown list.</p>	<p>Remember to destroy hardcopy of confidential information after payee setup is complete.</p>

Changes to the Supplier and Payee Request Portal:

Secure Portal  [See Demo](#)

New Item/Procedure	Description/Why	System
<p>Dropped Section: The Location of Business or Residence section has been removed from the Secure Portal.</p>	<p>New questions and clarifications were added to the Supplier Query and Request module to gather necessary information that was previously provided by payees in the Secure Portal.</p>	<p>These questions have been eliminated</p>

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New Item/Procedure	Description/Why	System
<p>Dropped Item: The Payee/Supplier Type field has been removed from the Tax Reporting Information section.</p>	<p>With the new questions and clarifications in the Supplier Query and Request module, this field is no longer needed.</p>	 <p>This entry has been eliminated.</p>
<p>New Item: I have a US Tax ID NUMBER</p>	<p>This question was added to assist in the timely and accurate collection of supporting documentation.</p> <p>When 'Yes' is selected, a description will appear to clarify what is needed.</p>	

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New Item/Procedure	Description/Why	System
<p>Changed Section: Documents</p> <p>New Description Text: Please complete and upload the documents requested by Stanford in the email you received.</p> <p>If no documents were requested by Stanford in the email, please continue to the Confirmation page by selecting “Next”.</p> <p>Links to blank forms, instructions and examples have been provided below.</p>	<p>This field used to have recommended documents based on the available information. The description text used to say:</p> <p><i>Complete and upload the documents listed below as appropriate. Links to blank forms, instructions and examples have been provided.</i></p> <p>Now the payee will see a full list of all possible documents. However the payee will now be given a specific list of required documents in their email invitation to the Secure Portal.</p>	