UNIVERSITY OF CALGARY

How to populate and submit the "New Supplier Request" – Business or Individual (i.e. non-employee) form

Getting Started:

The form can be retrieved from the SCM website: https://www.ucalgary.ca/finance/finance-forms, (**Suppliers to UCalgary** section) and is regularly updated. Please ensure to use a current version of the form

All fields with an asterisk (*****) are mandatory or form will not be processed. The submitter will be notified of any missing field/s and will be required to re-submit

DO NOT hand-write the form, save the form as a .pdf, fill in electronically, and email (instructions below)
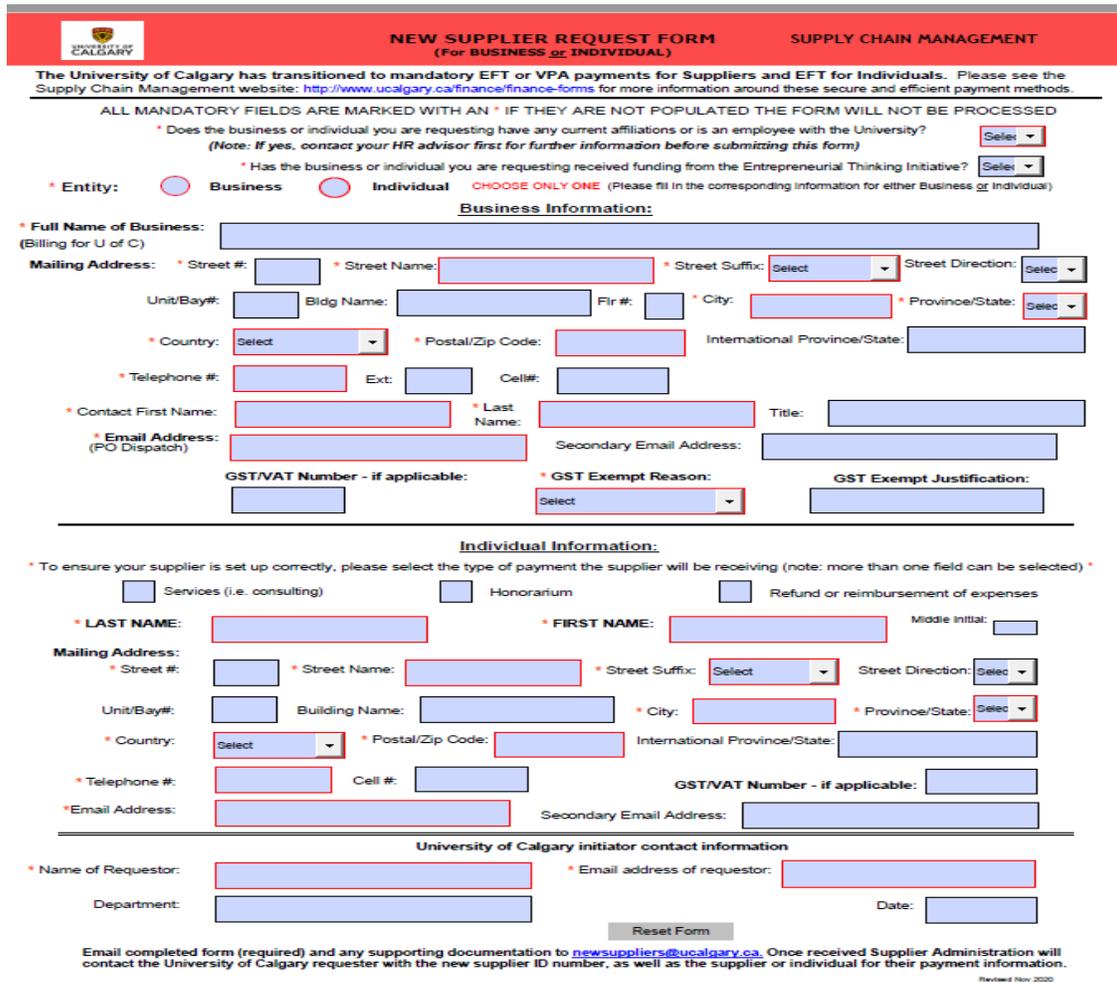
Use the dropdown menus for proper format and selections, 'hover' over fields for further instructions

DO NOT USE PUNCTUATION or special characters in any field [except email addresses], i.e. no periods, commas, dashes, hyphens. Only email addresses are allowed "@" and period/s

LEAVE OUT general prefaces such as "**THE**" or "**Dr**" from the beginning of the company or individual name (database searches for the entity will be too numerous)

Only choose one entity on the form: Business or Individual. If more entities are required, submit one form per entity

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A sample copy of the form on the SCM website:

Step 1: **Mandatory:** Ensure to answer the first 2 questions at the top of the form. If the answer is "yes" to question 1 i.e., a current University employee, do not continue to submit the form. Instead, contact your HR representative for further payment instructions.
If you are unfamiliar with question 2, answer "NO"

Step 2: Choose only 1 entity per form i.e.; **'Business'** or **'Individual'**. Once an entity is chosen the form will automatically drop down to the correct section
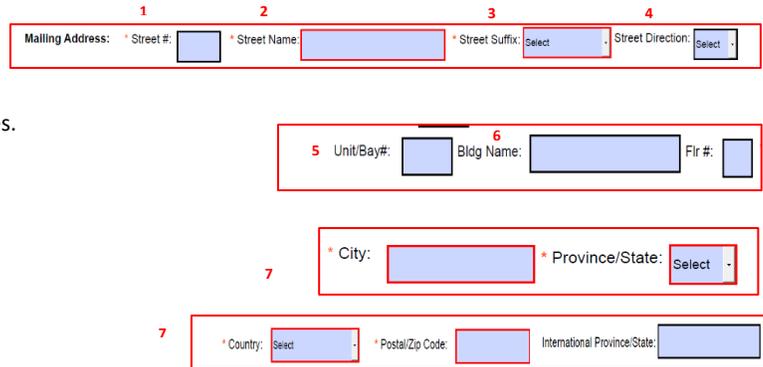
Step 3: Complete the full business name. Use the name that the company will be billing to the University of Calgary. Do not enter any special characters such as periods, commas, dashes. Leave out "The" or "Dr"

Step 4: Hover over fields for instructions;
1. **Street #:** use the first set of numbers for most Canadian addresses, for example 150 8 Avenue S.W. would be ""**150"**
2. **Street Name:** use the second set of numbers for streets in most Canadian addresses. In this case for *8th Avenue S.W.* the Street Name is entered as "**8**". Do not include the '*th*' A street name such as 'Centre Street' use only "**Center**" in this field, use 'street' in Street Suffix instead. If a PO Box is being used, use this field for the PO Box address.
3. **Street Suffix**: use the dropdown to indicate Avenue, BLVD, Bay, Circle, Street, etc. If the Street Suffix is not captured in the dropdown, then go back to the street name field and enter it there.
4. **Street Direction**: be sure to select the quadrant of the city using the dropdown if applicable
5. **Unit/Bay#:** Suite number, apartment number (not mandatory). Do not enter "#" sign, or proceed to Flr # field instead.
6. **Building Name:** not mandatory
7. **City/Province/State/Country/ Postal or Zip Code:**
   *All fields mandatory. For an international address only the City and Country are required.
   Use dropdowns. Include the space in a CAD postal codes.
   For USA zip codes, do not use the dash '-', use space instead.

Step 5:
1. **Telephone #:** Mandatory field. Use 10 digits with no spaces, parentheses or dashes. International phone numbers are alloted more spaces.
2. **Cell #**: Not mandatory same formatting as telephone # 10 digits, no spaces.
3. **Contact First Name/Last Name**: Mandatory Title is optional.
4. **Email address:** Mandatory, used to indicate the PO dispatch email for the company. Only field where special characters are allowed. If a specific person's email is available, use secondary email address field.

Step 6: **GST [VAT] Number (if applicable)**
If unsure if the business has a GST number, leave the GST# justification fields
Use the 9 digit number only with no spaces. (do not include 'RT00001' portion)
GST Exempt Reason: use dropdown, if not known if GST is exempt, select 'Not applicable'.

GST/VAT Number - if applicable:	* GST Exempt Reason:	GST Exempt Justification:
123456789	Select	

* GST Exempt Reason:

Select
Select
Income under requirement
Outside of Canada
Charity or Non-Profit
Other
Not applicable

INDIVIDUAL INFORMATION

Step 1: Mandatory field. Select the type of payment the non-employee (individual) will be receiving. One or more options can be selected.

Individual Information:
* To ensure your supplier is set up correctly, please select the type of payment the supplier will be receiving (note: more than one field can be selected)

1 ☐ Services (i.e. consulting)   ☐ Honorarium   ☐ Refund or reimbursement of expenses

Services: includes any goods provided, work completed or consulting services

Honorarium: one-time small payment usually under $500 to a non-employee as a thank you for voluntary services provided such as speaking at a conference

Refund or reimbursement of expenses: Repayment of costs personally incurred by a non U of C employee conducting university business or a refund for payments made to the university, i.e. by a student

Step 2: **Last name, first name** of the individual are mandatory. If the name has a hyphen, use a space instead. Middle initial is only required if there is a supplier record in PeopleSoft that exists with the same common name, the middle initial will be the unique identifier for the common name.

2 * LAST NAME: * FIRST NAME: Middle Initial:

Step 3: Same formatting as Step 4 above for all fields. Use the dropdowns in fields where available. No special characters allowed except in email address/s.

Step 4: **GST [VAT]** not mandatory and only required if individual submitting an invoice/s to the University includes GST, which will then be considered a 'sole proprietor'.
The supplier will then be subject to a T4A if over $500 is paid within a calendar year.
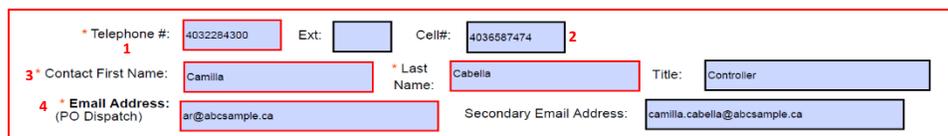
3 **Mailing Address:**
* Street #:   * Street Name: * Street Suffix: Select   Street Direction: Select
Unit/Bay#:   Building Name: * City: * Province/State: Select
* Country: Select   * Postal/Zip Code: International Province/State:
* Telephone #:   Cell #:   4 GST/VAT Number - if applicable:
*Email Address: Secondary Email Address:

Step 5: **FINAL SECTION – Name of Requestor [Submitter]:** Mandatory requirement for submitter to fill-in name & email address. Any missing information or improperly filled fields, the submitter will be contacted.

5	University of Calgary initiator contact information	
* Name of Requestor:		* Email address of requestor:
Department:		Date:
	Reset Form	

Email completed form (required) and any supporting documentation to newsuppliers@ucalgary.ca. Once received Supplier Administration will contact the University of Calgary requester with the new supplier ID number, as well as the supplier or individual for their payment information.

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Step 6: **Reset form:** if a mistake is made or a re-fresh required
No need to remove fields use "reset form" instead.

Step 7: Email completed form to newsuppliers@ucalgary.ca
along with any back-up documentation invoice, quote etc.
DO NOT submit a 'scanned form' save as a .pdf and email
the electronically filled in form to the above address.
Once the supplier ID# has been approved, the Supplier
Administration team will contact the submitter with a supplier ID#.

If you have any questions about this form, or new supplier submissions, please contact UService at finance@ucalgary.ca (403) 210-9300