Supplier Portal
Registration User Guide

Accessing Supplier Portal

- Catholic Health will provide the url for you to access the supplier portal website via the invite email.

- The Supplier Portal url can then be saved to your Favorites for quicker access in the future.

Technical Specifications

- Supported Web browsers:
  - Internet Explorer 11
  - Google Chrome latest version
  - Firefox latest version
  - Safari 5.1+

- Third-party tool bars and pop up blockers running in the browser may interfere with Supplier Portal operations.

- Monitor resolution could affect the Supplier Portal display. A resolution of at least 1024 x 768 is required to run the Supplier Portal.

Pre-Registration Notes

- Plan 20-30 minutes to complete the registration process.
  - Contact and Company Information must be entered to create your account.
  - Registration Questions can be completed later. Catholic Health does require specific information so we ask that you answer all questions and attach documents where requested.
  - Diversity and Commodity Codes can also be completed and saved separately.

- The Links section in the upper right portion of the home page includes documents and websites to provide guidance and information. Select and print the Pre-Registration Checklist. This document outlines the information and documents you will need to gather for a smooth registration process.

- Please assist in keeping our database consistent by entering information in all CAPS (except username and password which must follow the format provided in your invitation email and in section 5.1.1 and 5.1.2 below). There are some system fields that default to all CAPS.

- Fields with an asterisk* are system required but our business processes require additional information. Please enter data in all fields.

- The system will display any portal messages in the upper right portion of the screen (normally errors are in red with information and completed actions in blue).

- When navigating through the screens, utilize the Back button at the bottom left in the screen instead of the browser’s back arrow.

- The steps below are mainly for suppliers new to doing business with Catholic Health. Existing suppliers will be provided their username and will use the update account functionality but this information is applicable.
Begin Registration

1. Review Announcements for any downtime notices or important information.

2. The right portion of the blue bar contains information for assistance.
   2.1. Click Help to open Frequently Asked Questions (FAQ).
   2.2. Click Contact Us to find the email address to request additional assistance.
       (Note: The system currently shows these twice but will be corrected soon.)

3. Click Register to begin. Once a registered user, the Login functionality will be used instead.
4. Read and accept the Supplier Registration Terms and Conditions for use of the Supplier Portal website. These are Terms of Use and not terms related to purchase. The terms must be accepted before you can proceed with registration. Check the box then click Continue.

Depending on the screen you are viewing, you may need to scroll down to see the Continue button.

5. Enter your Contact Information (primary contact). The primary contact becomes the administrator for your company’s account. This primary contact should be your main Accounts Receivable representative. This person will be able to view all company invoices and payments. They will also add additional company contacts.

5.1. Create your login username and password. Your username and password are case sensitive. Please note the following rules:
5.1.1. **Username:** If the Catholic Health invitation did not provide a username, please use the following format to create a username.

5.1.1.1. First initial of first name, full last name, and **must end with sp** (jsmithsp).
If you receive an error message that the username already exists add a number before the sp (jsmith1sp, tjones2sp).

5.1.1.2. Do not use special characters (e.g. @ % ? # !) in your username.
Please note Catholic Health will not be able to process the Supplier Portal registration if the username does not follow the proper format.

5.1.2. **Password:** Must be at least 8 but no more than 20 characters in length and contain the following requirements:

5.1.2.1. Upper case alpha character (e.g., A, B, C)
5.1.2.2. Lower case alpha character (e.g., a, b, c)
5.1.2.3. Number (e.g., 1, 2, 3)
5.1.2.4. Maximum character repeat is 2

Passwords will expire every 90 days.

5.2. If you forget your username or password before your next login, you can retrieve using the *Forgot User Name* link on the home page or the *Forgot Your Password* link on the login page. The password reset functionality is not engaged until your first login when you will be asked to answer security questions.

5.3. The first field of the phone and fax number is for International Country Code. United States phone numbers can leave this field blank and enter area code and phone number in second field (format 123-456-7890). Click *Continue*.

6. Enter information about your Company then click *Continue*. Fields with an asterisk* are system required but our business processes require additional information. Please enter data in all fields. Remit to address is required. A box is available to check if Remit To is same as mailing address.

- Legal Company Name
- Dun and Bradstreet
- Tax Id Type
- Website
- Mailing Address
- Doing Business As
- Business Type
- Tax Id
- Remit To First and Last Name
- Remit To Address
7. You will receive a system generated email notification after contact information and company information screens are completed. This confirms that your account was set up but all steps must be finished for your registration to be considered complete. Information is saved when you click the Complete button in the lower right portion of each screen and move to the next page. If you are unable to complete full registration at one time, you must click cancel to exit the registration process and then click the logout button.

7.1. Contact and Company Information must be completed at a minimum to set up your account.

7.2. The system will not give you an error if you do not answer Registration Questions but please note that Catholic Health does require specific information so we ask that you answer all questions. It will save our staff the time that would be required to follow up with you for missing information and/or documents.

7.3. Instructions on how to update your account information is provided near the end of this document.

7.4. Registrants with incomplete profiles cannot be validated and will not have the opportunity to view invoices and payments.

8. Select Add for a list of Diversity Codes.
8.1. Check the appropriate box(es) to select diversity code(s) then click Attach to Supplier.

8.2. Note message in upper right of screen is in blue to reflect completed action.

8.3. Click Continue

9. Answer all applicable Registration Questions and attach requested documents.
9.1. You may enter NA in the text box if it does not apply to you.

9.2. Scroll down to click Continue.
10. Click *Add* for the list of Commodity Codes.

**Supplier Registration - Commodity Codes**

10.1. The top level codes with their descriptions are displayed.

10.2. There are two levels of commodity codes. Click on the plus sign next to the code to display any specific commodities within that group. You can register for the top level which will include all commodities within that grouping or you can select one or more specific commodities at the lower level.

10.3. Select all commodity codes for the products and/or services that your company can provide by checking the respective box(es) and then click *Attach to Contact*. The Attach button must be used before proceeding to the next page or your selections on the previous page will not be saved.
TIP: You can change Page Size to “All” then you will be able to use the side scroll bar to view all without having to navigate between multiple pages. This allows you to scroll and select commodity codes then click Attach To Contact one time.

10.4. You can also use the Search field. Using an asterisk* as a wild-card, type a partial description and select Search to return entries containing the selection. Check box(es) then Attach to Contact. Note: Commodity Code must contain search term to return results; list may not be comprehensive.

10.5. When complete click Continue.
11. Registration is now finished. Verify the Registration Status = Complete. Click Done.

**Supplier Registration - Status**

Status
Registration status: Complete
Congratulations! Your account has been set up. Please logout and login immediately to establish password security.
Supplier Number Vs: 63

**Updating Information**

1. Once your account is setup, you are able to login and update information. Click login from the home page.

2. Enter username and password. Click the arrow or Enter key.
3. The first time you login, you will be prompted to answer three of the five security questions. This enables the password reset functionality allowing you to click a link to reset your password without needing to call anyone.

3.1. Click Save Questions and you will be returned to the home page.

4. Messages we send will appear on the home page.
4.1. Click the Inbox link and another screen will open where you can manage your messages similar to an email inbox by marking them as Read, Deleted, or Unread.
5. Click on *Update Account Information* to change any of the information you previously entered.

5.1. The following sections have an Edit button which will open the screens for editing.
- Supplier Information (Company information)
- My Contact Information
- Questions
- Diversity Codes
- My Commodity Codes
- Additional Contacts

5.2. Update the information as needed then click the *Back* button to return to the main Account Information page.
5.3. When finished with updates, click *Home* or *Logout*. 
Viewing Invoices and Payments

1. When all registration requirements have been met and approved, Catholic Health will “validate” your account. This status authorizes your Primary Contact to be assigned security to view Invoices and Payments.
   1.1. Should you choose to have other contacts in your company view Invoices and Payments, please click **Contact Us** to submit the request.

2. New menu options will appear on your home page.

2.1. Click the link to view Invoices or Payments
2.2. The examples below do not have data to display but you will see additional buttons on each screen to drill around into Details.

Welcome aboard!! Please do not hesitate to click the **Contact Us** link to ask for assistance if needed.