



NBS Job Aid

Revised: 10/10/2007

Topic: Submit a Request to Add a Vendor to the NBS Vendor Tables

NBS Courses: Buyer-Acquisitions
Buyer-Contracts
Buyer-Inventory
BPA Administrator
NIH Vendor Requestor
Miscellaneous Obligation Preparer

Special Note about the ADB:

Through December 2007, the Administrative Database (ADB) will still function for **vendor** informational **changes only** on simplified acquisitions through the EIN request process. There are **no new EIN requests allowed in the ADB** for simplified acquisitions transactions. Any EIN changes requested in the ADB **do not transfer over** to the NBS.

Background:

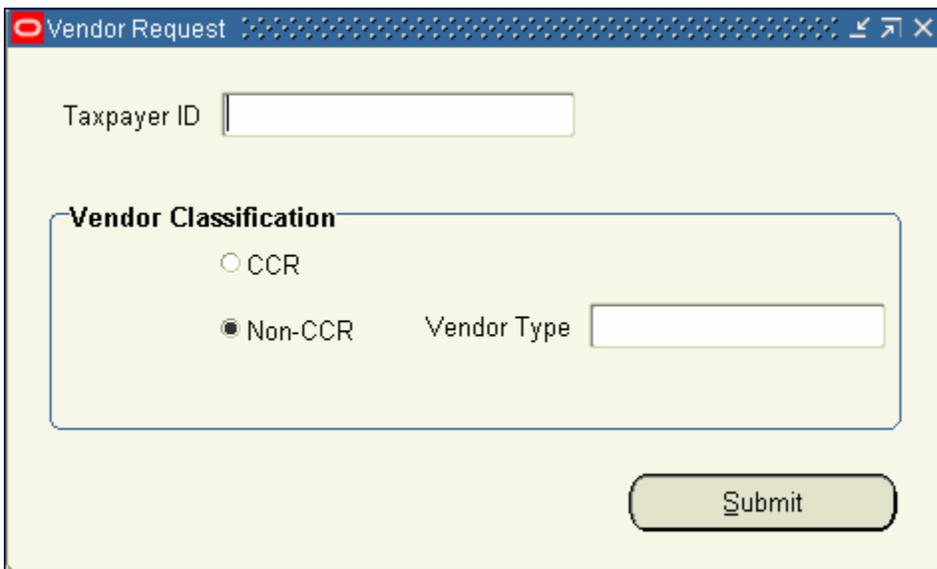
You searched for a vendor in PRISM (or Oracle), but they were not in the NBS Supplier table. You now need to submit a Vendor Request to OFM to have the vendor added.

The screenshot shows a web-based search interface. At the top, there are buttons for 'Search', 'Cancel', 'Hide', and a help icon. Below these is a 'Vendor Selection' header with the message 'No matches found.' in red text. The search criteria are as follows: 'Search Type' is set to 'Basic'; 'Search' is set to 'Name'; and 'For' is set to 'Bio Star'. An arrow points from the 'For' field to the 'No matches found' message.

Note 1: In order to submit a Vendor Request in the NBS you must first have access to the Vendor Request responsibility in Oracle. The Roles that currently have this Oracle access, enabling vendor requesting, are listed at the top of this job aid. The most comprehensive resource on vendor requesting is the *NIH Vendor Requestor* student guide located on the Budget and Finance portal page, accessible through my.nih.gov.

Note 2: Vendor information *cannot be modified* through PRISM. In some cases, you may see the name of the vendor, but the address is incorrect. You can select an alternate address (i.e. site) that is already associated with the vendor, but you cannot hand-type (or over-type) any address information in PRISM. If you do, PRISM will throw an error during validation. A Job Aid for “Change a Vendor Address in PRISM” is posted on the Acquisitions portal page, under Job Aids, Buyer Acquisition, accessible through my.nih.gov.

1. From the **Oracle E-Business Suite Navigator**, click  **NIH AP Vendor Requestor**.
2. Click the  **NIH Vendor Request** link that displays to the right. After a few moments the **Vendor Request** window displays.



Vendor Request

Taxpayer ID

Vendor Classification

CCR

Non-CCR

Vendor Type

Submit

DECISION: CCR or Non-CCR? Please read the Q&A below to decide which option to select.

Q: What is CCR?

A: *The Central Contractors Registration (CCR) is a Government-wide repository of information on those entities (i.e., contractors, individuals, etc.) interested in doing business with the Government.*

Q: Why is the NIH concerned about using the CCR?

A: *As of October 1, 2003, the new Federal Acquisition Regulation (FAR) policy requires all Federal Agencies to use the CCR database as their single point of vendor information.*

Q: What is Non-CCR?

A: *While most vendors and individuals are classified as CCR vendors there are some that may qualify for an exemption or deviation to the mandate of CCR registration. NBS refers to these vendors or individuals as “Non-CCR”.*

Q: What are some of the FAR Exemptions that would make a vendor Non-CCR?

A: *The following exemptions to the CCR requirements are found at FAR 4.1102 -*

- i. Purchases that use a Government wide commercial purchase card as both the purchasing and payment mechanism, as opposed to using the purchase card only as a payment method.*
- ii. Classified contracts (see 2.101) when registration in the CCR database, or use of CCR data, could compromise the safeguarding of classified information or national security.*
- iii. Contracts awarded by Contracting officers in the conduct of emergency operations, such as responses to natural or environmental disasters or national or civil emergencies, e.g., Robert T. Stafford Disaster Relief and Emergency Assistance Act (42 U.S.C. 5121).*
- iv. Contracts to support unusual or compelling needs (see 6.302-2).*
- v. Awards made to foreign vendors for work performed outside the United States, if it is impractical to obtain CCR registration. Example: some foreign vendors are unable to obtain an NATO Commercial and Government Entity (NCAGE) code due to their Country's restrictions which would prevent them from registering in the CCR.*
- vi. Micro-purchases that do not use the electronic funds transfer (EFT) method for payment and are not required to be reported (see Subpart 4.6).*

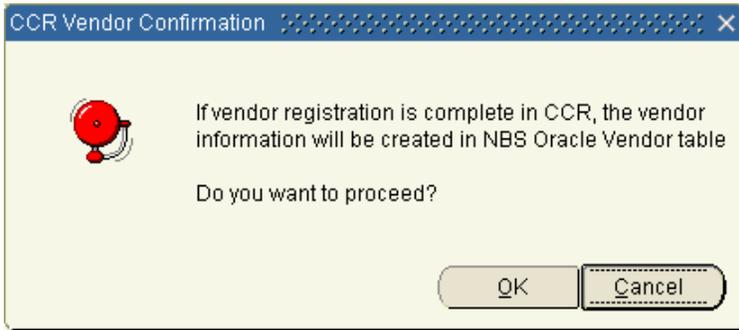
Q: Are professional services provided by individuals subject to the CCR requirement?

A: *A: Yes and No. There is a Health and Human Services (HHS) class deviation from the CCR requirement based upon specific expertise in Health Sciences. As of August 2007 use of this deviation associated with a purchase order in the NBS is limited by policy issuance (Temporary Convenience Check Policy issued on August 1, 2007) from Office of Acquisition and Logistics Management (OAMP). You may only request non-CCR entry of a guest speaker in the NBS Vendor table associated with a purchase order over \$3000.00. Request for entry of these non-CCR vendors is limited to no more than 2 times per individual, each entry being valid for a 45 day period from the time of OFM approval. The requester **must notate** in the vendor request preparer's comment field that they are requesting approval due to a 1st or 2nd time exception to convenience check policy for the individual. Without notation, OFM will reject the request. For subsequent visits the speaker would be required to register in the CCR.*

3. Click either **CCR** or **Non-CCR**.

Case 1: CCR

4. Enter the **Taxpayer ID** and click the **Submit** button. You will receive the Confirmation message below.

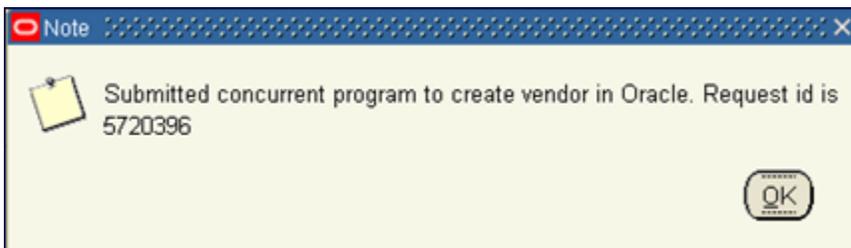


Note: Foreign Vendors in the CCR

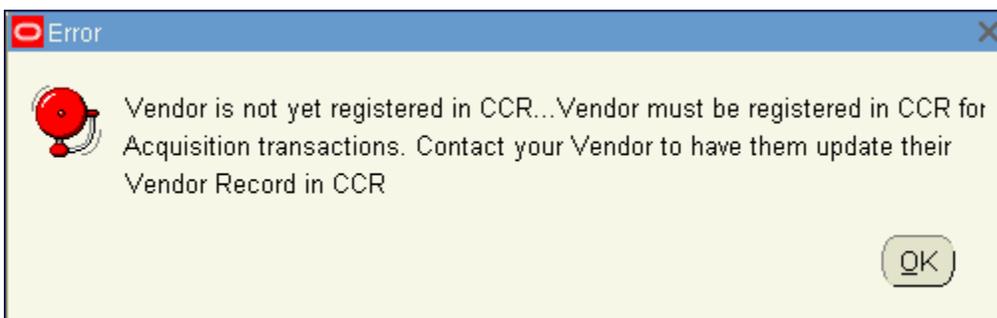
There is a special situation where a Foreign Vendor is registered in the CCR but does not have a TIN. The NBS Project Team is working on an enhancement to accommodate for this special situation. In the meantime, please submit a ticket to the NIH Help Desk who will perform the download to the NIH Supplier Table.

5. Click the **OK** button.

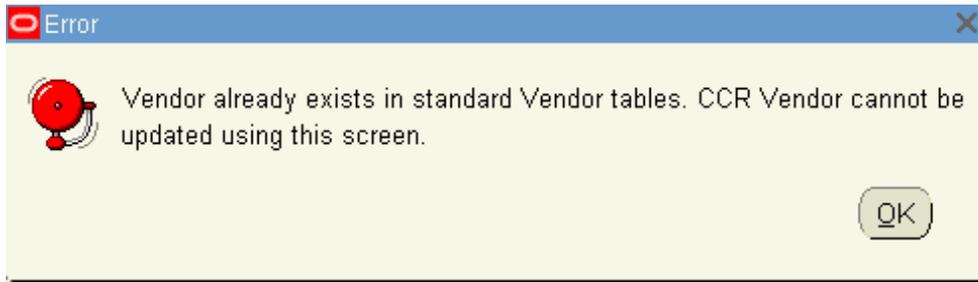
Note 1: If your vendor is already registered in the CCR, you will get a confirmation message indicating the vendor will be pulled into the NBS Oracle Vendor table, also known as the NBS Supplier Table. This process takes approximately 15 minutes, after which the vendor will be available for selecting in PRISM. Pulling records from the CCR can take a longer or shorter period of time. The message will supply a request number for your reference.



Note 2: If you receive the error message below, then the vendor is *not* registered in the CCR. You must ask the vendor to register themselves in the CCR. Once they are registered, you can request they be downloaded from the CCR to the NBS Supplier Table.



Note 3: If you receive the error message below, then the vendor is *already* in the NBS table, and must also have been registered in the CCR. If changes are required, you must contact the vendor and ask them to update their company's information directly in the CCR.



Case 2: Non-CCR

4. Enter a value in the **Taxpayer ID** field (if you have one).
5. Place your cursor in the **Vendor Type** field to activate the List of Values (LOV) button. Then, select the LOV button.
6. Type % in the **Find** field of the lookup. Click the **Find** button below.
7. Select the appropriate **Vendor Type** (e.g. GUEST SPEAKER), and click the **OK** button.
8. Click the **Submit** Button. The **Vendor Request** window is displayed.
9. Use the table below to enter data for the required header fields.

Note: please enter all information in ALL CAPITAL LETTERS to avoid rejection of the request.

Field	Description
Supplier Name	Required. Enter the Vendor's name in capital letters . <u>Note:</u> Enter the first name and the last name, if the vendor is an individual (i.e., GUEST SPEAKER).
Alternate Name	Required. Enter Vendor's name in capital letters . <u>Note:</u> Enter the last name and the first name in all capital letters, if the vendor is an individual (i.e., GUEST SPEAKER). If the vendor is a business, that falls under a FAR Exemption, enter the company/supplier name.
Taxpayer ID	Enter the numeric taxpayer ID for the vendor. DO NOT enter any spaces or dashes. <u>Note:</u> A hard error will be shown if the ID is not 9 digits long, or if the Tax ID is associated with an existing vendor in Oracle.
Requester Comments	Enter comments if necessary.

Pseudo SSNs

These are only to be generated when an individual or vendor does not have a Taxpayer Identification Number (TIN) or SSN of record. Typically, this will be a *foreign* individual. OFM will likely reject other requests for individuals who do not have a TIN or SSN.

Generate Pseudo SSN	Check this box if the Social Security Number (SSN)/TIN is not available at this time. <u>Note:</u> Checking the <i>Generate Pseudo SSN</i> will generate a number for the SSN from a custom sequence.
Pseudo SSN Comments	If the <i>Generate Pseudo SSN</i> field is used, you must enter the reason the SSN/TIN is not available for this vendor.

10. CCR Exemption is a required field for non-CCR entries, click inside the descriptive flexfield field in the upper right. Then, in the CCR Exemption field, select a reason from the lookup.

Note: Select **FAR-Deviation-Health Sciences** for guest speakers providing professional services. See restrictions noted earlier in this Job Aid.

Note 2: If a request for a non-CCR vendor is made and a FAR exemption is cited, OFM will verify the use of that exception through the NIH Division of Simplified Acquisition Policy and Services (DSAPS), Office of Acquisition Management Policy (OAMP). DSAPS will communicate back to OFM whether or not the circumstances specific to that buy are covered by the exception. If necessary, discussions will be held between the two offices, and once a decision is made, the request will be processed accordingly. The initiating office will be notified if the exception is not granted.

11. Click the **OK** button.
12. Click the **OK** button again.
13. Click the **Save** icon  from the toolbar to save your work.
14. Click the **Sites** button in the lower right.
15. Complete the required information in the **Supplier Sites** window using the table below.

Note: please enter all information in ALL CAPITAL LETTERS to avoid rejection of the request.

Field	Description
Site Name	Required. The Site Name should be the name of the city associated with the vendor address followed by a dash and a sequential number starting with 1.
Address	Required. Enter the address line information. Remember to spell out the full address. Do not abbreviate street, boulevard, etc.
State	Required. Enter the two letter state code.
Postal Code	Required. Enter the postal zip code.

16. Using the **Tab** key on your keyboard, tab over to the **Bank Information** descriptive flexfield  on the right side of the window.

Note 1: If no banking information is available, **you must enter an explanation in the Reason for Non-Availability field in the center of the screen.** An example would be a Foreign Individual who does not have a US bank account. Banking information **is required** for all US vendors and individuals.

Note 2: you *cannot* click directly into this flexfield. You must use the **Tab** key instead.

17. Fill out the banking fields using the table below. Then, click the **OK** button.

Field	Description
Bank Name	Enter the vendor's bank name.
Bank Branch Name	Enter the vendor's bank branch name.
Routing Number	Enter the vendor's bank's routing number.
Bank Account Number	Enter the vendor's bank's account number.
Bank Account Type	Enter C for checking account or S for savings account.

Note: If you are completing the above form for the *first time*, you do NOT need to complete the ACH form and fax it to OFM.

Note 2: What if the vendor record *already exists* with banking in NBS Supplier Table, and you need to update the banking information only? In this case, you must then Fax the ACH form to OFM and send your request to update banking by email to Ratna Bhadra at BhadraR@od.nih.gov. Banking information cannot be updated through the Non-CCR request process.

Note 3: Individuals set up as Non-CCR Vendors are limited to **one (1)** bank account for payment purposes.

Note 4: If a site already exists which is a **Travel** site, then a note must be entered in the **Requester Comments** field. Please include the following text: "Banking information should be copied from the Travel site."

18. To enter the contact information for the vendor, select the **Contacts** tab. Then, enter the following required fields.

Field	Description
Last	Enter the contact's last name.
First	Enter the contact's first name.
Telephone	Enter the contact's area code and telephone number.

19. Select the save icon  from the toolbar to save the vendor site details.

20. To enter additional **Sites** (i.e. Addresses) for the vendor, press the **Down Arrow** ↓ key on your keyboard. This should clear the vendor Request form. You can now enter a second vendor Site (i.e. Address) using the steps above. And don't forget to click the **Save** button after entering each new record.

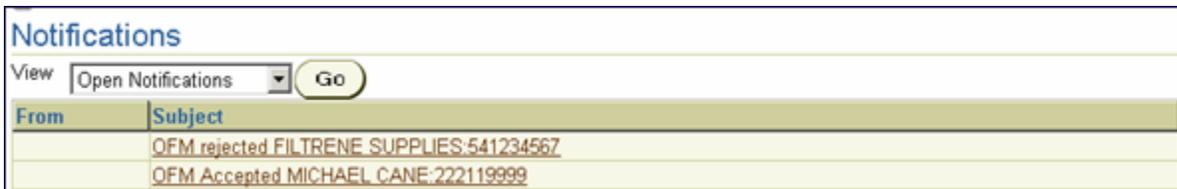
21. Click the  in the top right-hand corner of the **Supplier Sites** window. You are returned to the main **vendor Request** window.
22. Click the **Submit for Approval** button in the lower right.
23. Click the **OK** button.

Note: The **Vendor Request Status** field in the upper left is updated to **In Process**. You cannot update the **Vendor Request** form now that the status is **In Process**.

Follow-up: Check the Status of a Request:

OFM should approve or reject your request within a few business days. Once approved, the vendor will be available in the NBS Supplier Table and accessible through PRISM or Oracle. To determine the status of your request, follow the steps below:

1. From the **Oracle E-Business Suite Navigator**, click  [NIH AP Vendor Requestor](#).
2. Click the  [Notifications](#) link that displays to the right. After a few moments, the **Workflow Notifications** window displays.



3. Review your Notifications to see if the vendor request was approved or rejected by OFM.

Note: Click on the **Subject** link to view the details. If it was rejected by OFM, a Rejection Reason will be provided.

Rejection of Non-CCR request:

Q: What do I do if my Non-CCR request has been rejected by OFM?

A: *Review the rejection reason provided by OFM. If response from OFM indicates you should correct and resubmit, follow the instructions above for submitting a Non-CCR request, make appropriate corrections where necessary and resubmit the request to OFM (note: do not submit a duplicate request).*

