



## The Ohio State University and OSU Wexner Medical Center Workday Strategic Sourcing Supplier Guide

Welcome Suppliers!

Thank you for your interest in partnering with **The Ohio State University** and **The Ohio State University Wexner Medical Center**. As of January 2026, OSU and OSUWMC implemented **Workday Strategic Sourcing** (WSS) to strengthen supplier relationships and streamline procurement processes. This platform offers suppliers enhanced control and convenient self-service access to purchase orders and invoices.

This guide provides step-by-step instructions for creating your Workday account and includes helpful resources to support your onboarding.

If you have any questions, or to inquire about your company's status with OSU or OSUWMC, please don't hesitate to reach out and our team would be happy to assist.

### OSU University Vendor Maintenance

Email: [BF-PRSM-WEBFORM@osu.edu](mailto:BF-PRSM-WEBFORM@osu.edu)

Web: [For Suppliers | Business and Finance](#)

### Ohio State Wexner Medical Center Vendor Maintenance

Email: [vendormaintenance@osumc.edu](mailto:vendormaintenance@osumc.edu)

Web: [Vendor Interaction | Ohio State Medical Center](#)

## Why Register in Workday?

The **Workday Strategic Sourcing (WSS)** portal is the central hub for our supplier partners. Registering in WSS gives you access to:

- Manage your company profile and contacts.
- Securely update tax and banking information.
- View the status of invoices and payments.

WSS uses **Workday Central Login (WCL)** for secure authentication. To create an account, you'll need to verify your email, set a strong password, and pair an authentication app.

**Tip:** For the best experience, complete your registration on a desktop computer rather than a mobile device.

The following pages will walk you through the steps to get set up in WSS.

## Before you Begin

### Allow Workday System Emails

Throughout the registration process, you will receive important messages from **Workday**. Even after your **WSS** account is active, supplier administrators may contact you through these addresses.

To ensure you don't miss any updates, please allow emails from:

- [no-reply\\_strategicsourcing@workday.com](mailto:no-reply_strategicsourcing@workday.com)
- [no-reply-wcl@workday.com](mailto:no-reply-wcl@workday.com)

### Gather the Necessary Documents

Before starting your registration, make sure you have the following information ready:

- IRS-9 information (For more information, see <https://www.irs.gov/pub/irs-pdf/fw9.pdf>)
- **Banking details** for payment setup, including a voided check or account information on official bank letterhead. (See the section later in this document for details on required documentation)
- Diversity classification (if applicable)
- Company contact information

### Download an Authenticator App

To register and sign in to your account, you'll need an **authenticator app** to enable multi-factor authentication. These apps can be downloaded from the Apple App Store, Google Play Store, or you can use a web-based authentication tool.

Popular authenticator apps include:

- Duo Mobile
- Authy
- Google Authenticator
- Microsoft Authenticator
- Okta

You can also use free or paid web-based solutions, such as:

- Authenticator browser extension
- LastPass
- 1Password

# Supplier Onboarding

The Supplier Onboarding process begins when you receive an email invitation from OSU to create an account and begin filling out onboarding forms.

## Email Invitation to Register as a Supplier

If you are already working with OSU or OSUWMC employees to become a supplier, they may start the process for you. When that happens, you'll receive an email from Workday Strategic Sourcing.

The email will come from [no-reply\\_strategicsourcing@workday.com](mailto:no-reply_strategicsourcing@workday.com)

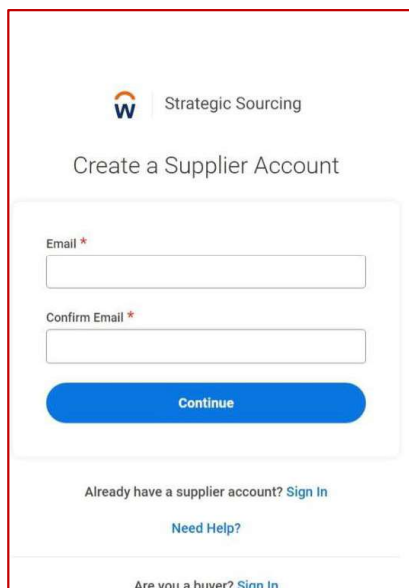
To begin:

1. Open the email.
2. Click the link provided to start the onboarding process.

Workday will guide you through each step. Be sure to follow the instructions carefully on every page.

## Enter your email address

1. Enter your email address in both boxes.
  - a. Workday will send you a confirmation link to that address.
  - b. Use an email address that you actively watch and that is associated with you as a supplier. You'll use this same address for:
    - i. Your Workday Central Login
    - ii. All future communications with OSU



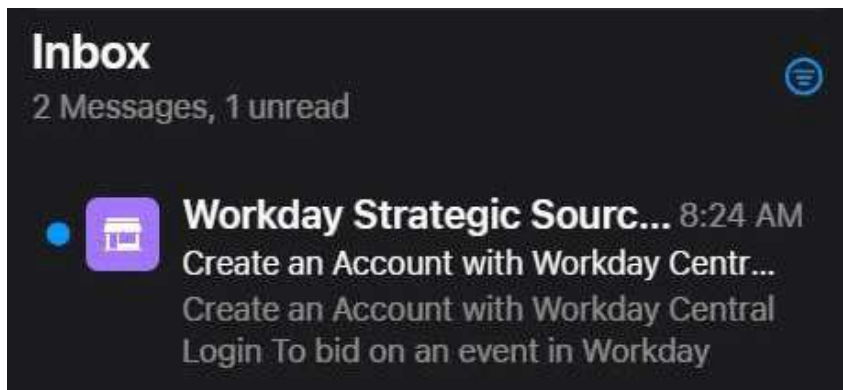
The screenshot shows a web form titled "Create a Supplier Account" from Workday Strategic Sourcing. It features two input fields for "Email" and "Confirm Email", both marked with an asterisk. Below the fields is a blue "Continue" button. At the bottom, there are links for "Already have a supplier account? Sign In", "Need Help?", and "Are you a buyer? Sign In".

2. The following screen will ask for a verification code.

3. Check your email—Workday will send you a message with the code you need.

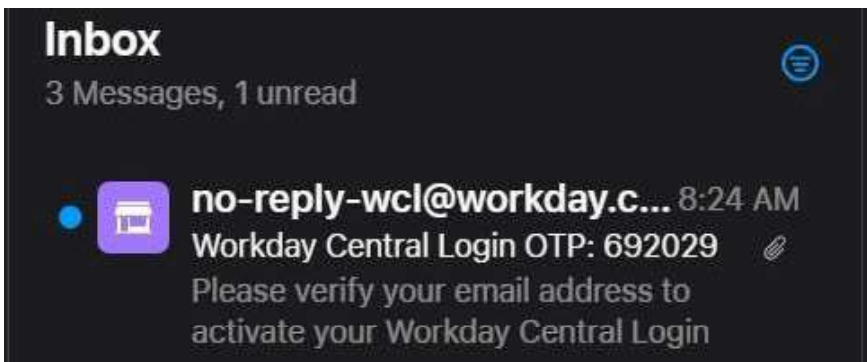
## Check your email

1. You'll receive an email from [no-reply\\_strategicsourcing@workday.com](mailto:no-reply_strategicsourcing@workday.com). Be sure to check your spam folder if you have not received the message.
2. In the email, click the **Create Account button** to begin.
3. A new browser window will open and redirect you to the Workday registration page



## Verify your email address

1. Workday will display a page titled "Start by Verifying Your Email."
2. Click the blue **Send a Verification Code** button.
3. You'll be redirected to a page where you need to enter a 6-digit code.
4. Check your email—Workday will send you the code you need.

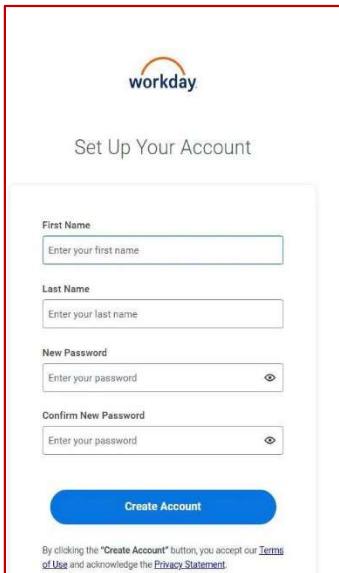


## Add Name and Create Password

Enter the following information:

- First Name
- Last Name
- New Password
- Repeat Password

When you're finished, click the **Create Account** button.



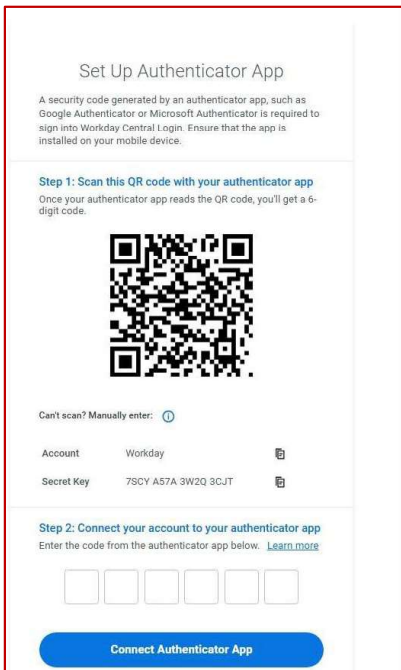
The screenshot shows the 'Set Up Your Account' page on the Workday website. At the top is the Workday logo. Below it is the title 'Set Up Your Account'. The form contains four input fields: 'First Name' (placeholder: 'Enter your first name'), 'Last Name' (placeholder: 'Enter your last name'), 'New Password' (placeholder: 'Enter your password'), and 'Confirm New Password' (placeholder: 'Enter your password'). Each password field has an eye icon for toggling visibility. Below the fields is a blue 'Create Account' button. At the bottom, there is a small disclaimer: 'By clicking the "Create Account" button, you accept our [Terms of Use](#) and acknowledge the [Privacy Statement](#).'

## Set Up Authenticator App

Using the **authenticator** app you downloaded earlier:

Scan the **QR code** displayed on the Workday screen to link the app with your Workday account.

1. In the app, you'll see a **6-digit** code.
2. Enter that code in the boxes on the Workday screen.
3. Click the blue Connect Authenticator App button to finish.



The screenshot shows the 'Set Up Authenticator App' page. It includes a title, a paragraph explaining that a security code from an authenticator app is needed for Workday Central Login, and instructions to scan a QR code. A large QR code is displayed. Below it is a link for 'Can't scan? Manually enter:'. There is a table with account details: 'Account' (Workday) and 'Secret Key' (7SCY A57A 3W2Q 9CJT). Below the table are instructions for 'Step 2: Connect your account to your authenticator app', which includes a link to 'Learn more' and six empty input boxes for a 6-digit code. At the bottom is a blue 'Connect Authenticator App' button.

## Adding a Mobile Phone Number (optional)

Workday will ask if you'd like to add a mobile number.

To add your number:

- Enter your phone number.

- Click the blue Add Your Mobile Number button.
- Workday will text you a 6-digit confirmation code. Enter that code when prompted.

If you prefer not to add a mobile number, click **Skip this Step**.

## **Registering New User**

On the next screen:

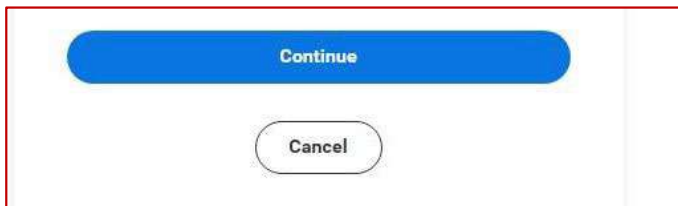
- Click the checkbox to confirm that you **Accept the Terms and Conditions**. (This step is required.)
- Optionally, you can:
  - Add your Job Title
  - Add an additional Phone Number
  - We recommend setting up your Time Zone to ensure accurate scheduling and notifications.

# Complete Company Information and Forms

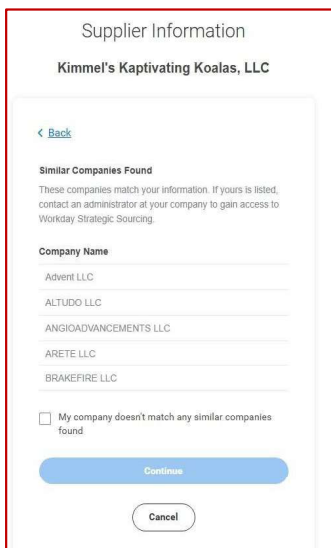
Creating your **Workday Central Login** is just the first step in becoming a supplier. Now that your account is set up, the next step is to associate it with your supplier profile and The Ohio State University.

Now, let's start adding some details about your company.

- Enter your **Company Name** in the field provided.
- Then click the blue Continue button to move to the next step.



- If companies with similar names are found, you'll see a list of those companies.

A screenshot of a web form titled "Supplier Information" for "Kimmel's Kaptivating Koalas, LLC". The form includes a "Back" link, a section for "Similar Companies Found" with a warning message, a list of company names (Advent LLC, ALTUDO LLC, ANGIOADVANCEMENTS LLC, ARETE LLC, BRAKEFIRE LLC), a checkbox for "My company doesn't match any similar companies found", and "Continue" and "Cancel" buttons at the bottom.

**Important:** If your company name is already listed:

- **Do NOT continue with registration.**
- Instead, contact [BF-PRSM-WEBFORM@osu.edu](mailto:BF-PRSM-WEBFORM@osu.edu) (University) or [vendormaintenance@osumc.edu](mailto:vendormaintenance@osumc.edu) (Medical Center) to request access to Strategic Sourcing. Attach W-9 information for account verification.

If your company is not duplicate:

1. Check the box that says **My company does not match any other companies.**
2. Click **Continue** to proceed.

A screenshot of a form element showing a checked checkbox next to the text "My company doesn't match any similar companies found". The checkbox is a small blue square with a white checkmark.

# Workday Strategic Sourcing Dashboard

Your first stop after logging in is the Workday Strategic Sourcing (WSS) dashboard.

This dashboard allows you to:

- View any active requests from companies you supply
- See your WSS customers
- Manage your communications with their supplier administration teams

The screenshot shows the Workday Strategic Sourcing dashboard interface. At the top, it says 'Strategic Sourcing' and 'Welcome, Eddie'. The user's name 'EDDIE VAN HALEN' is visible in the top right. A navigation menu on the left includes 'Dashboard' and 'Customer Directory'. The main content area is divided into sections: 'PROFILE REQUESTS' and 'RESPONSES'. Under 'PROFILE REQUESTS', there is a card for 'The Ohio State University (Sandbox)' with a status of 'Not started' and a 'MANAGE' button. Below this is a table of 'RESPONSES' with columns for 'TITLE', 'SUPPLIER COMPANY', 'DUE', and 'PUBLISHED'. A callout box points to the 'MANAGE' button, stating: 'The Manage button lets you view and edit any forms from OSU'. Another callout box points to the 'RESPONSES' section, stating: 'Any new forms or messages from OSU supplier administrators will appear in the Responses section'. A third callout box points to the 'Customer Directory' link in the navigation menu, stating: 'This button lets you view all companies you do business with through Workday Strategic Sourcing.'

# Completing Onboarding Forms

The Ohio State University and the OSU Wexner Medical Center require two onboarding forms to collect important supplier information:

- **Supplier Business Details Form**
  - This form gathers essential contact information, foreign bank details, and confirms your agreement with OSU's business terms and conditions.
- **Supplier Onboarding Form**
  - This form collects your business address, communication preferences, and banking/payment details.

Click the **Manage** button on the dashboard to begin filling out your OSU supplier onboarding forms. The next screen will show the forms and necessary steps to complete your onboarding.

The screenshot displays the Strategic Sourcing dashboard for 'The Ohio State University (Sandbox)'. The user is logged in as 'EDDIE VAN HALEN'. The dashboard shows a 'YOUR ONBOARDING JOURNEY!' section with two forms: 'Supplier Business Details' and 'Supplier Onboarding', both with due dates of 12/5/2025. There are buttons for 'OPEN FORM' and 'CURRENTLY VIEWING'. Below this is an 'ONBOARDING INFORMATION' section with a 'MESSAGE CENTER' and 'EDIT' button. A 'Welcome' letter is displayed, thanking the user for their interest and providing instructions on how to use the site.

Your onboarding forms are listed here, along with their due dates and whether they've been completed.

Click Edit to begin filling out the form

When you first log in, the Supplier Onboarding form will already be open.

Take a moment to read the Welcome Letter.

## Completing the Supplier Onboarding Form

The **Supplier Onboarding Form** is designed to collect essential information for setting up your organization in Workday, including Company Details, Tax Information, Banking Information, and Required Supporting Documents.

Fields marked with a **red asterisk (\*)** are required.

If any required fields are left blank, Workday will display an alert upon submission, prompting you to correct the errors before continuing.

### Adding Business Addresses

Your business may have one address or multiple addresses for different purposes. In this section of the form, you should:

- Add All Relevant Addresses
  - Include every address associated with your business and pay close attention to the Usage setting for each address.
- Select the **Country**
  - Begin by choosing the country for the address. Once selected, Workday will automatically display the correct address fields for that country.
- Indicate the **Usage**
  - Specify the **Usage** for the address (e.g., Remit-To, Purchase Order, Legal).
- Add Additional Addresses
  - Click **Add Address** to include more addresses as needed.

### Adding Business Phone Numbers

- Add All Relevant Phone Numbers
  - Include every phone number associated with your business.
- Select the **Country**
  - Choose the country to automatically set the correct International Calling Code.
- Enter **Phone Number Details**
  - Provide the phone number information in the proper fields.
- Add Additional Numbers
  - Click **Add Phone** to input more phone numbers as needed.

### Setting Tax Information

- Set the **Tax Country**
  - Begin by selecting the country where your business is registered for tax purposes.
- For U.S. Suppliers: Choose the **Tax ID Type**
  - Available options include:

- DUNS
  - Employer ID
  - Federal Employer Identification Number (FEIN)
  - Sales Tax / Use Tax
  - Sales Tax / Use Tax (entries appear for each U.S. state)
  - SSN or ITIN
  - U.S. Individual Taxpayer Identification Number (ITIN)
- Enter the **Tax ID**
  - Provide the proper Tax ID based on the selected type.
- Add Additional Tax IDs
  - Click **Add Tax ID** to input more Tax IDs if needed.

### Setting Banking Information

- Select **Payment Types**
  - You can choose one or multiple payment types for the account.
- Add **Account Details**
  - Provide the following information:
    - **Bank Account Country**
      - Selecting the country will display the proper fields for that region.
    - **Bank Account Type**
      - Choose Checking or Savings.
    - **Routing Transit Number**
    - **Bank Account Number**
    - **Bank Name**
- Add **Additional Accounts**
  - Click **Add Bank Account** to enter more accounts if needed.
- Select **Payment Type**
  - Assign the payment type(s) for each account.

### Adding Additional Company Contacts

Use this section to add any additional contacts for your company. These contacts will be linked to OSU's Workday Core account. Each contact must create their own Workday Central Login Account to gain access to WSS.

### Uploading Required Documents

You must upload two types of identification:

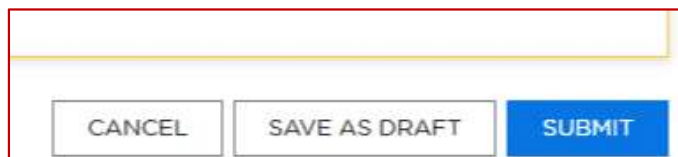
- Tax Identification or Certification Paperwork (e.g., W-9, W-8 series documentation)
- Banking Information (e.g., voided check, verification letter, etc.)
- File Requirements
  - Acceptable Formats: PDF or Word
  - Maximum File Size: 30,720 KB

Acceptable Document Types include:

- Voided Check must include bank name, account holder name and address, and routing number.
- Account Verification Bank Letter must include official bank letterhead, bank name and address, account holder name, routing and account numbers.
- For foreign banks: Include intermediary bank info, IBAN, SWIFT code, BIC, Sort code.
- A Screenshot of Bank Website must include the bank logo, name, address, account holder name, and routing and account numbers.
- For foreign banks: include intermediary bank info.

### Submitting or Saving Your Form

When all required fields and documents are complete, click **Submit** to send your form to OSU for processing.



If you need to gather more information or are not ready to submit, click **Save as Draft**. This allows you to return and finish your form later.

### Supplier Business Details Form

After submitting your Supplier Onboarding Form, you will see a confirmation pop-up message. Now it's time to complete the Supplier Business Details Form.

Click **Open Form** to begin.



## Filling out the Supplier Business Details form

The screenshot shows the 'Supplier Business Details' form in the Strategic Sourcing system. The page includes a navigation bar with 'Strategic Sourcing', 'HOME', 'SUPPORT', and a user profile for 'EDDIE VAN HALEN'. The form title is 'Supplier Business Details' with a back button and 'SUBMIT FORM' button. The 'FORM DETAILS' section contains the following information:

SUBMISSION DEADLINE	ISSUING COMPANY	SUPPLIER COMPANY	PRIMARY CONTACT
12/5/2025	The Ohio State University (Sandbox)	EDM	Joshua Kimmel

The 'FORM' section is titled 'QUESTIONNAIRE' and includes an 'OPEN QUESTIONNAIRE' button. Below the button, it states: 'Fill out the questions in the Form below then submit your response.' A table lists the sections of the form:

SECTION	DESCRIPTION	LAST UPDATED	STATUS	# OF FEEDBACK	ACTIONS
Business Details		Never	(Not started)	--	OPEN
Supplier Contact		Never	(Not started)	--	OPEN

After clicking **Open Form**, the form will load on your screen.

Click the **blue Open Questionnaire** button to begin editing.

As before, any field marked with a **red asterisk (\*)** is required and must be completed before submission.

### Supplier Business Details – Required Fields

1. Select Your **Business's Federal Classification**
2. Provide **Alternate Address** (if applicable)
  - a. If goods or services provided to Ohio State University are shipped from or performed at a location different from your primary/mail address, enter the full address here.
  - b. If no alternate address is required, enter "N/A".
  - c. This address will be used for income reporting purposes.
3. Indicate whether your business is subject to any "Unresolved" findings for recovery under Ohio Code Section 9.24
  - a. This supplier IS NOT subject to unresolved findings.
  - b. This supplier IS subject to unresolved findings.
4. Complete Any Other Applicable Fields
5. Click Next at the bottom of the page to proceed.

### Completing Supplier Contact

1. Foreign Bank Information (if applicable)
  - a. For non-U.S. payments (EFT Foreign Banks), provide the following:
    - i. Beneficiary (Primary) Bank detail
    - ii. Intermediary (Secondary) Bank details
    - iii. If no foreign bank will be used, enter "N/A".

2. Currency for Electronic Funds Transfer
  - a. If your bank requires transfers in a currency other than USD, indicate the accepted currency.
  - b. If transfers will be in USD, enter “N/A”.
3. Conflict of Interest Disclosure
  - a. To your knowledge, does any OSU employee have a financial or fiduciary interest in your business?
  - b. Examples include:
    - i. Receiving employee compensation
    - ii. Serving as a board member or officer (paid or unpaid)
    - iii. Holding equity or ownership interest
4. Select Yes or No.

## Completing Payment Details

5. Select Payment Type
  - a. Preferred: Electronic Funds Transfer (EFT via Automated Clearing House ACH).
6. Choose Payment Terms
  - a. Select a payment term that aligns with your chosen payment type.
7. Provide Contact Emails
  - a. Purchase Order Delivery Email
    - i. Where OSU will send purchase orders.
  - b. Remittance Email
    - i. Where payment notifications will be sent.
8. Click Next

## Accepting Terms and Conditions

The screenshot shows a web form titled "Supplier Business Details" under the "Strategic Sourcing" header. The user is logged in as "EDDIE VAN HALEN". The form is currently on the "TERMS & CONDITIONS" section, which is highlighted in blue in the left-hand navigation pane. The main content area shows a question number "3.1" followed by a paragraph of terms and conditions. Below the text is a radio button labeled "Accept" which is selected, and a "Clear selection" link. At the bottom of the form, there are navigation buttons for "< PREVIOUS" and "NEXT >". The overall progress indicator shows "11 of 12 Required Questions" and "0 of 7 Optional Questions".

By completing the forms, your company agrees to The Ohio State University standard purchase order (PO terms and conditions, which may include:

- Office of Sponsored Programs
- Purchasing Department

- Wexner Medical Center

To confirm agreement:

- Click the Accept radio button.
- Proceed to the next step as prompted.

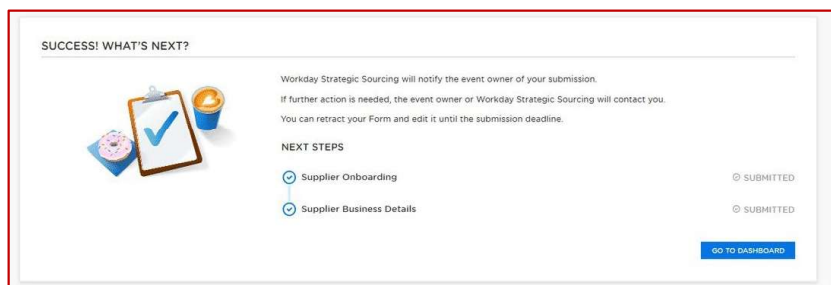
## Submitting

When all required fields and documents are complete, click Submit to send your form to OSU for processing.

If any fields are missing or incorrectly completed, Workday will display error messages on the front page.

These errors appear as red links. Click each red link to navigate directly to the section that needs correction.

After making corrections, click Submit again.



# Congratulations!

You've successfully submitted all required forms to The Ohio State University and the OSU Wexner Medical Center.

## What Happens Next?

1. Your submission will be reviewed by OSU for accuracy and completeness.
2. If more information is needed, you will receive a notification through WSS and to the email address you provided.
3. Once approved, your supplier account will be activated, and you'll be able to receive purchase orders and payments according to the details you provided.

## Timeline of Approval Steps

### Week 1 - Supplier Administrator Review

Once your submission is received, OSU Supplier Administrators will:

- Validate your information and enter it into OSU Workday Core.
- If any information is missing or incorrect, they will contact you via:
  - Workday Strategic Sourcing messaging, or
  - Email to request corrections.

### Following weeks - Status Monitoring

If more information is needed, you will receive emails directly from WSS and to the email address you provided.

To provide the requested details:

1. Log in to WSS.
2. Review any messages or requests for updates.
3. If forms have been sent back for corrections, click **Edit** to update and resubmit.

### Success - Granted an OSU Supplier ID

After approval, you will receive an email from WSS confirming that you have been made an official supplier for OSU.

To obtain your Workday Supplier ID (format: SPL-#####):

- Log in to WSS.
- Navigate to your dashboard to view your Supplier ID.

Keep your Workday Supplier ID for future business coordination with OSU.