

Uploading Supplier Credentials and Qualifications



Your screen in SCPro may differ slightly from this training, but the steps to complete the activity will be the same.



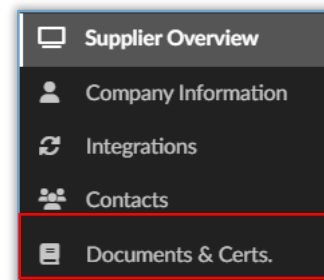
This icon indicates there are further **policy or business process details** relating to a step.

There are 5 different types of supplier documents that both suppliers, and certain State users can upload on a supplier's record in SCPro:

- **IRS Documents** – For example, a valid W9 form. IRS Documents must be added to a supplier's record when completing their initial registration. Subsequent updates to IRS documents can be added at any time but will require a Supplier Change Request to be approved. For more information, refer to the **Submitting Supplier Change Requests QRG**.
- **Legal Documents** – These documents (e.g., a certificate of incorporation) can be uploaded by your organization at any time and are not subject to approval by the State.
- **MWBE Certifications** – These documents are used to verify MWBE status. They follow an approval workflow in SCPro that is independent of the supplier registration process. MWBE Certifications do not require a Supplier Change Request to be submitted to be updated but must be approved by a supplier document approver.
- **Certifications** – These documents (e.g., EN 9100) can be uploaded by suppliers or the State at any time and are not subject to approval by the State.
- **Climate Change Documents** – These documents (e.g., EN 9100) can be uploaded by suppliers or the State at any time and are not subject to approval by the State.

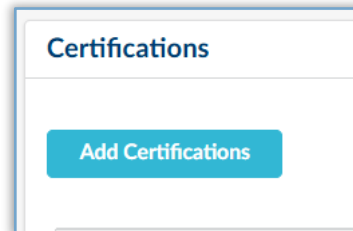
To upload a supplier document:

1. Navigate to the **Suppliers** module in the Main-Menu Navigation Bar and select **Browse Suppliers** from the drop-down menu.
2. Use the **Keywords** search, or the available filters to search for the name of the supplier whose documents you would like to update. When you locate the supplier, click the **Pencil**  icon to open the supplier's record.
3. Navigate to the **Documents & Certs** tab.



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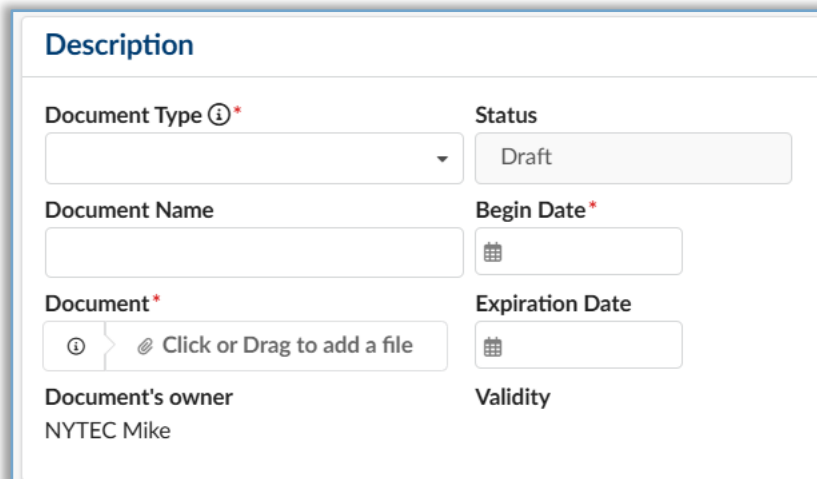
- Documents are broken into 5 sections which correspond to the document types outlined at the beginning of this document. Scroll to the appropriate section, then click the **Add Documents** button for that section.



The screenshot shows a box titled "Certifications" with a blue button labeled "Add Certifications" inside.

(e.g., In the Certifications section you would click **Add Certifications**.)

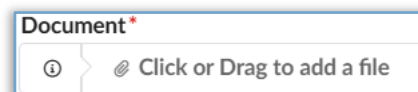
- Complete the **Description** section, including:



The screenshot shows a form titled "Description" with the following fields:

- Document Type** (dropdown menu with an info icon and asterisk)
- Status** (text field with "Draft" entered)
- Document Name** (text field)
- Begin Date** (calendar icon and text field with an asterisk)
- Document** (text field with an info icon, a file upload icon, and the text "Click or Drag to add a file")
- Expiration Date** (calendar icon and text field)
- Document's owner** (text field with "NYTEC Mike" entered)
- Validity** (text field)

- Document Type*** – e.g., EN9100 – options will depend on the document category
 - Document Name** – A label for the document in the system.
 - Begin Date*** – The date that the document becomes/became valid.
 - Expiration Date** – If relevant, the date that the document will no longer be valid.
- Click on the **Click or Drag to add a file** button in the Document field, then select and upload the document from your desktop.



The screenshot shows a close-up of the "Document" field with the text "Click or Drag to add a file" and a file upload icon.

Then click **Save & Close**.

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7. Repeat this process for any additional documents you need to add to the supplier's record. When you are finished, click **Save & Close**.



Congratulations! You have successfully supplier credentials and qualifications for a supplier record in SCPro.