

AHA Supplier Portal Guide: Create Change Request (Approved Suppliers)

Create & Submit a Profile Change Request (Approved Suppliers)

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AHA Supplier Portal Guide: Create Change Request (Approved Suppliers)

Introduction

AHA requests that all approved supplier proactively maintain your business' information, in our Supplier Portal, any time your information changes. Such information we request you maintain includes:

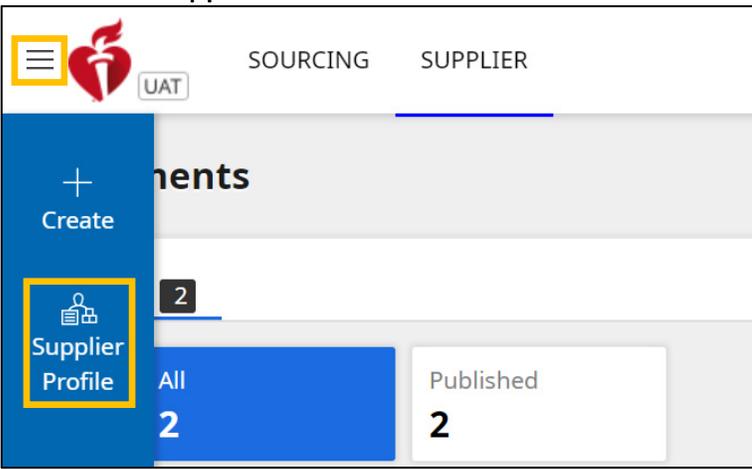
- Supplier Name (Note: a new W-9/W-8 Tax Form is required)
- Tax ID Number (Note: a new W-9/W-8 Tax Form is required)
- Remittance Information including:
 - Remit-to Address
 - Preferred Payment Method (ie: Check, ACH, Wire Transfer)
 - Bank Account Information for ACH or Wire Transfer payment methods
- Contacts including:
 - Account Representatives
 - Accounts Receivable Contacts
 - Customer Support Representatives
- Diversity Status & Certificate

Please follow the steps outlined in this guide for creating and submitting a Change Request to update your business information.

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Log into the Supplier Portal and Access Supplier Profile

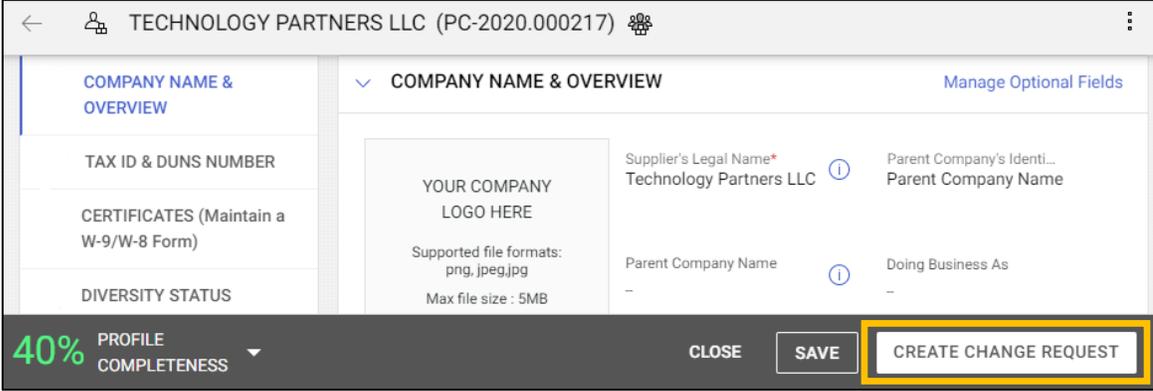
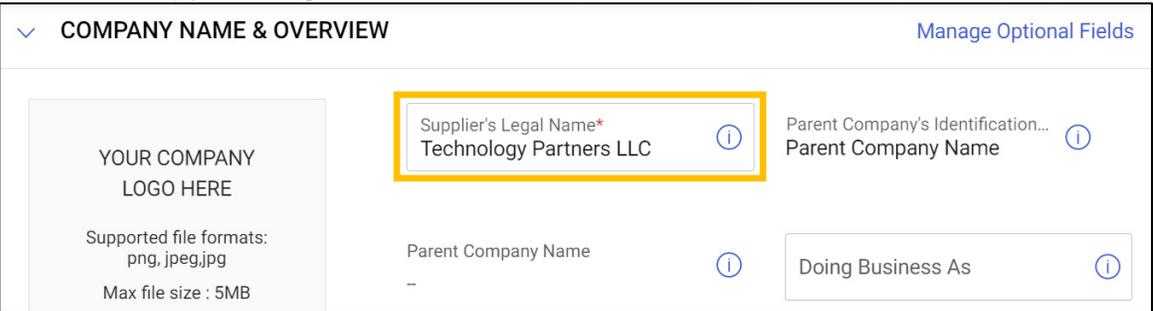
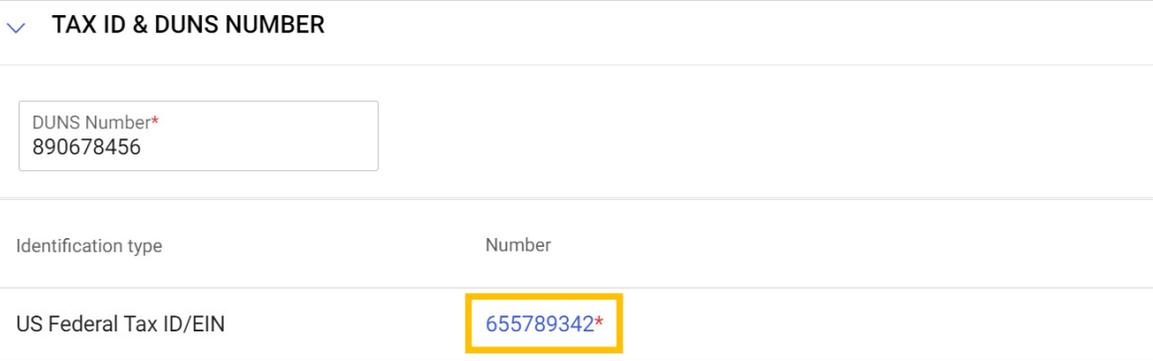
Please follow the steps outlined below to log into the AHA and access your Supplier Profile.

Step	Description
1	<ul style="list-style-type: none"> • Within your web browser go to https://smart.gep.com/ • You will be taken to a login screen where you will enter your Username and Password. • Press the LOGIN button 
2	<ul style="list-style-type: none"> • Once you are logged in, click on the menu icon ☰ in the top left of the screen • Click on the Supplier Profile icon within the left menu bar. 
3	<ul style="list-style-type: none"> • You will be taken to your company's supplier profile 

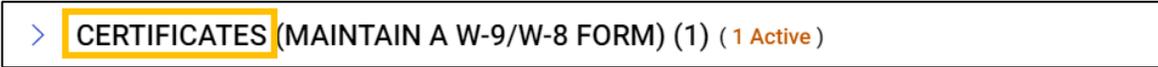
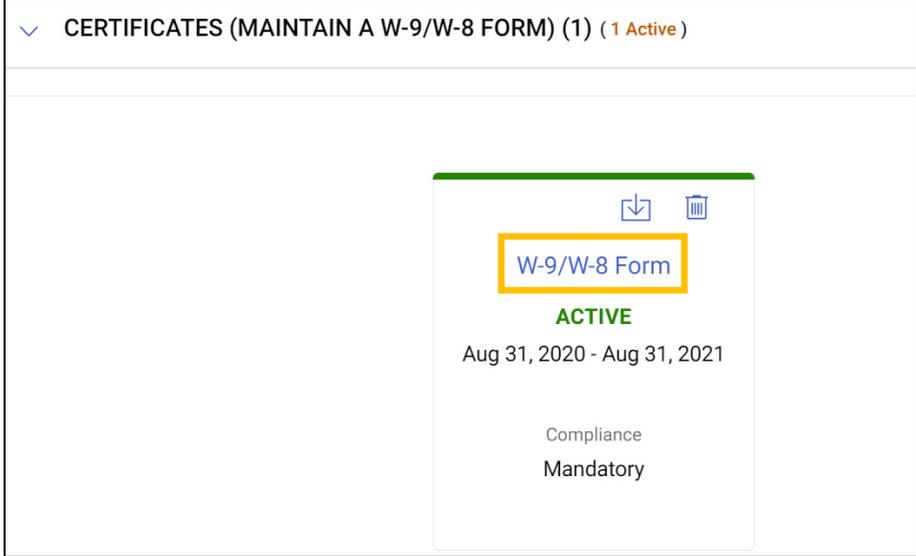
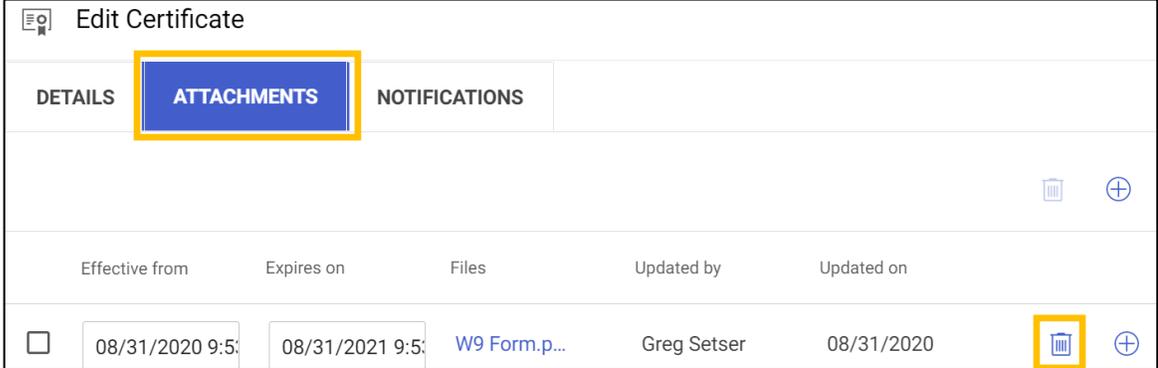
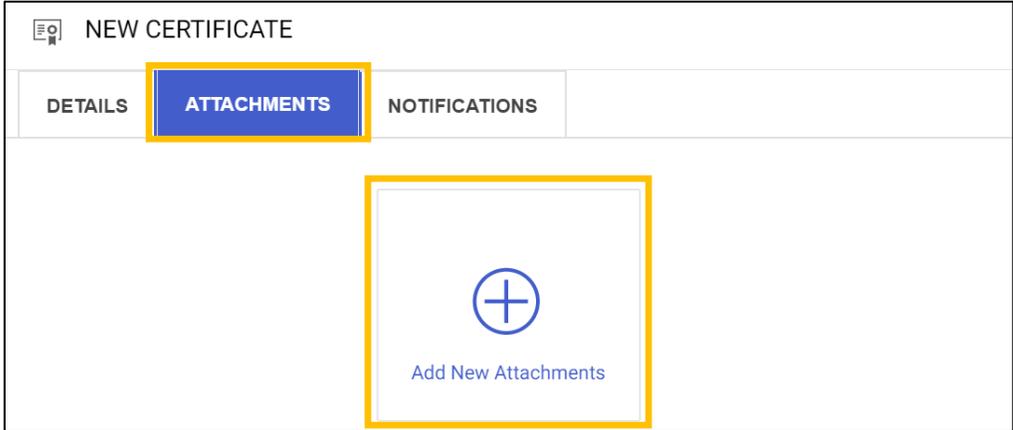
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Update Supplier Name, Tax ID & W-9/W-8 Form

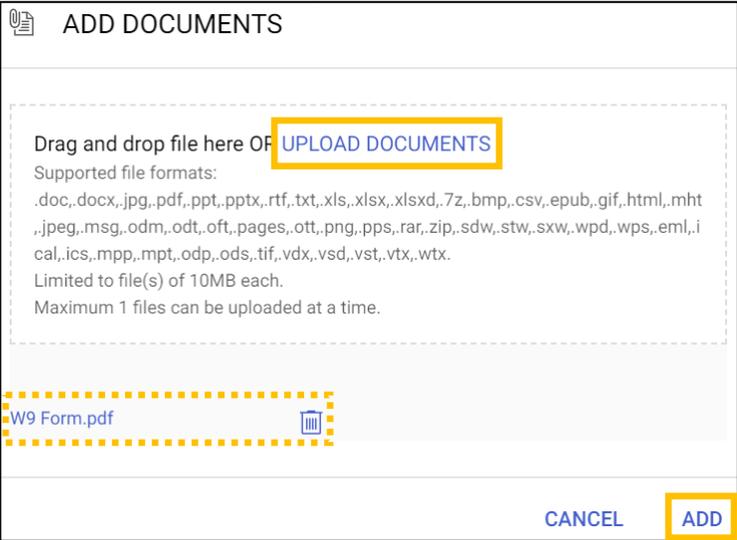
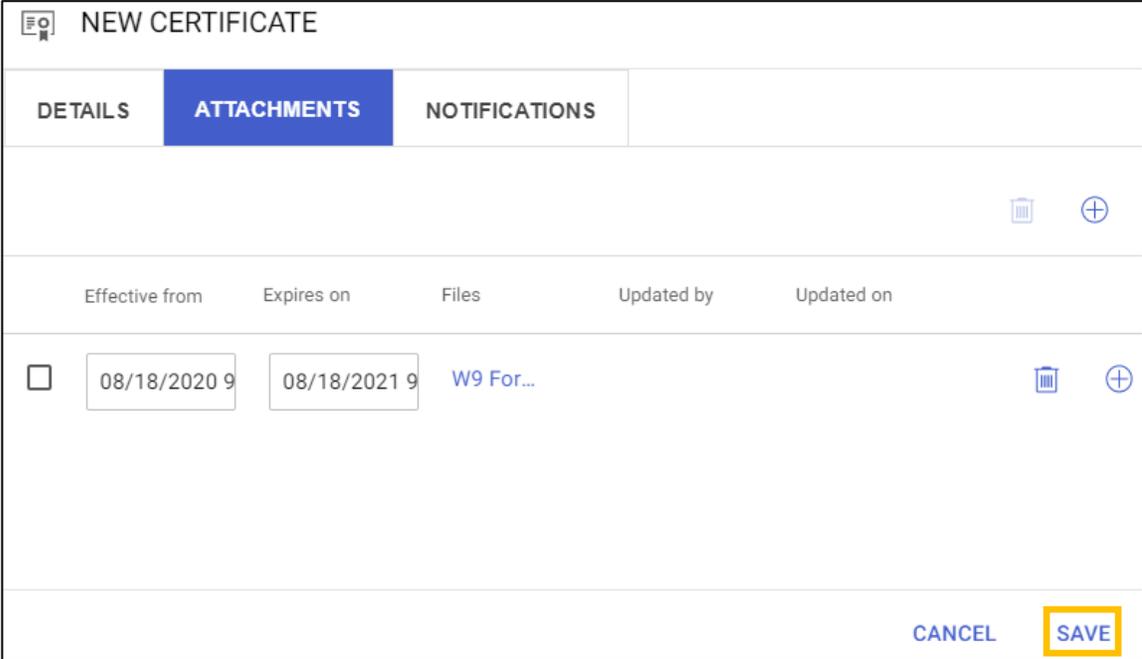
Please follow the steps below to update your Supplier Name, Tax ID Number, and W-9/W-8 Tax Form. AHA requires you attach a **new** signed W-9/W-8 form if your Company Name or Tax ID changes.

Step	Description
1	<ul style="list-style-type: none">Click on the CREATE CHANGE REQUEST button at the bottom right corner of the page 
2	<ul style="list-style-type: none">Scroll to the COMPANY NAME & OVERVIEW section, click on the title to open the section 
3	<ul style="list-style-type: none">Locate the Supplier's Legal Name field and update it with your new legal company name 
4	<ul style="list-style-type: none">Scroll down to the TAX ID & DUNS NUMBER section, click on the title to open the section 
5	<ul style="list-style-type: none">Locate your Tax ID Number (Identification Number field), click on the number, and update it with your company's new Tax ID Number. 

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Step	Description
6	<ul style="list-style-type: none"> Scroll down to the CERTIFICATES section, click on the title to open the section  <p>> CERTIFICATES (MAINTAIN A W-9/W-8 FORM) (1) (1 Active)</p>
7	<ul style="list-style-type: none"> Locate the tile for the W-9/W-8 Form and click on the name within the tile.  <p>▼ CERTIFICATES (MAINTAIN A W-9/W-8 FORM) (1) (1 Active)</p> <p>W-9/W-8 Form</p> <p>ACTIVE</p> <p>Aug 31, 2020 - Aug 31, 2021</p> <p>Compliance Mandatory</p>
8	<ul style="list-style-type: none"> Click on the ATTACHMENTS tab at the top of pop-up window Click on the Trashcan icon  on the right side of the line  <p>Edit Certificate</p> <p>DETAILS ATTACHMENTS NOTIFICATIONS</p> <p>Effective from Expires on Files Updated by Updated on</p> <p><input type="checkbox"/> 08/31/2020 9:5: 08/31/2021 9:5: W9 Form.p... Greg Setser 08/31/2020  </p>
9	<ul style="list-style-type: none"> Click on the Add New Attachments tile in the middle of the section  <p>NEW CERTIFICATE</p> <p>DETAILS ATTACHMENTS NOTIFICATIONS</p> <p></p> <p>Add New Attachments</p>

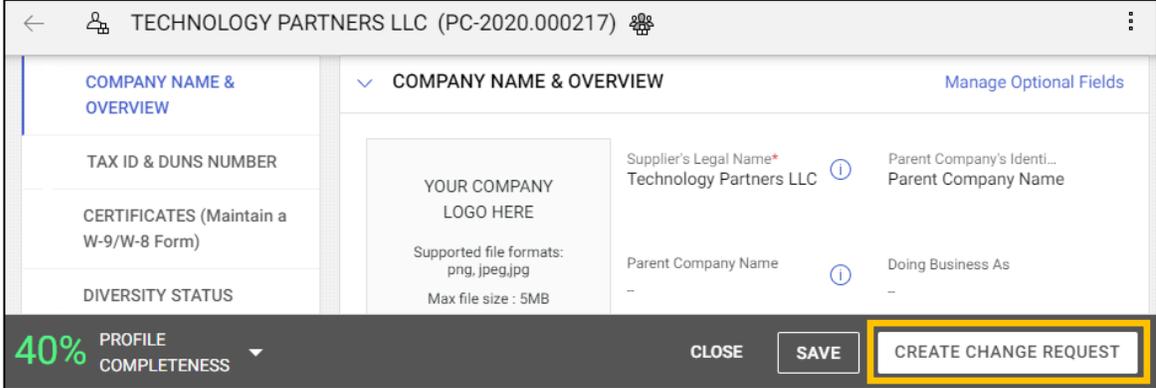
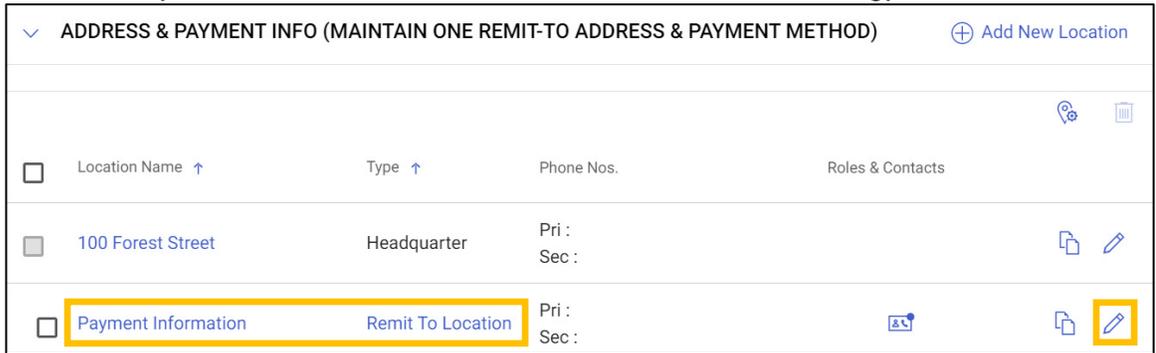
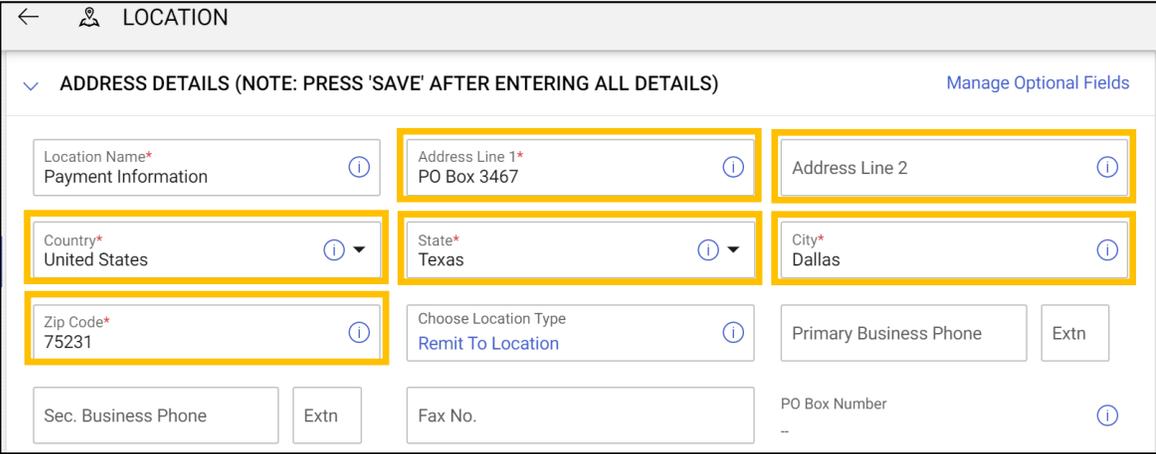
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Step	Description
10	<ul style="list-style-type: none"> Click on the UPLOAD DOCUMENTS link to find the W-9/W-8 Form you would like to upload Once the upload is complete, the document will appear towards the bottom of the window Click on the ADD button at the bottom right of the window 
11	<ul style="list-style-type: none"> Click on the SAVE button at the bottom right of the window 
12	<ul style="list-style-type: none"> Click on the SUBMIT button at the bottom of the screen to submit your changes 
13	<ul style="list-style-type: none"> AHA will review the change request and contact you if we find any issues. The updated information will take effect only after AHA approves the Change Request

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Update Remit-to Address and Payment Information

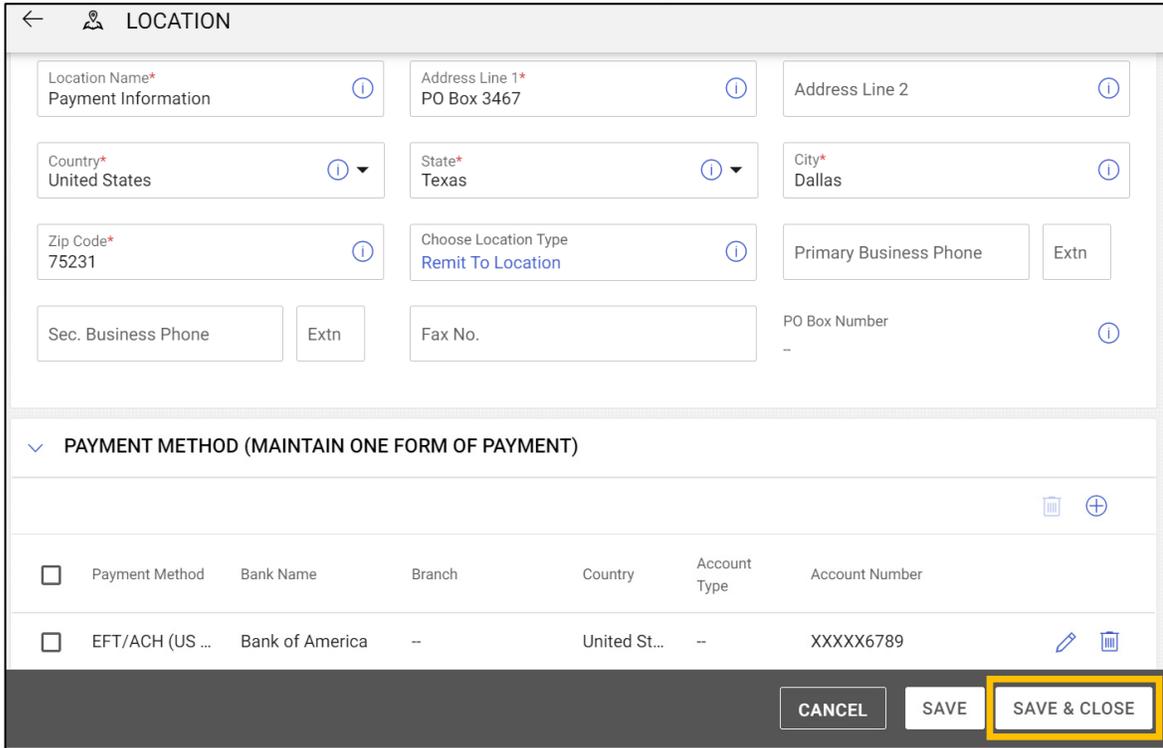
Please follow the steps below to update your Remittance/Payment Information including your Remit-to Address, Preferred Payment Method and Banking Details.

Step	Description
1	<ul style="list-style-type: none"> Click on the CREATE CHANGE REQUEST button at the bottom right corner of the page 
2	<ul style="list-style-type: none"> Scroll down to the ADDRESS & PAYMENT INFO section, click on the title to open the section 
3	<ul style="list-style-type: none"> Click on the pencil icon  or Name of the address line where the Type is Remit To Location 
4	<ul style="list-style-type: none"> A screen will open where you can edit the Remit-to Address & Payment Method To edit the Remit-to Address, make changes to the information under ADDRESS Details 

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Step	Description																
5	<ul style="list-style-type: none"> To edit the Payment Method, click on the PAYMENT METHOD title to expand the section Click on the pencil icon  on the right side of the line. <div style="border: 1px solid black; padding: 5px; margin-top: 10px;"> <p> <input checked="" type="checkbox"/> PAYMENT METHOD (MAINTAIN ONE FORM OF PAYMENT)   </p> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 5px;"> <thead> <tr> <th style="width: 5%;"></th> <th style="width: 25%;">Payment Method</th> <th style="width: 20%;">Bank Name</th> <th style="width: 10%;">Branch</th> <th style="width: 10%;">Country</th> <th style="width: 10%;">Account Type</th> <th style="width: 10%;">Account Number</th> <th style="width: 10%;"></th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>EFT/ACH (US...</td> <td>Bank of America</td> <td>--</td> <td>United St...</td> <td>--</td> <td>XXXXX6789</td> <td style="text-align: right;">   </td> </tr> </tbody> </table> </div>		Payment Method	Bank Name	Branch	Country	Account Type	Account Number		<input type="checkbox"/>	EFT/ACH (US...	Bank of America	--	United St...	--	XXXXX6789	 
	Payment Method	Bank Name	Branch	Country	Account Type	Account Number											
<input type="checkbox"/>	EFT/ACH (US...	Bank of America	--	United St...	--	XXXXX6789	 										
6	<ul style="list-style-type: none"> A pop-up window will appear showing the Payment Method and Bank Details Edit the information, then click the DONE button at the bottom right of the pop-up window (Note: The list of Banking fields will be different based on the payment method selected) <div style="border: 1px solid black; padding: 10px; margin-top: 10px;"> <p style="text-align: center;">PAYMENT METHOD (Maintain One Form of Payment)</p> <p style="background-color: #fff9c4; padding: 5px; text-align: center;">Saving with updated Payment Method will replace existing data with respective field's data.</p> <div style="margin-top: 10px;"> <div style="border: 1px solid #ccc; padding: 5px; margin-bottom: 10px;"> Payment Method EFT/ACH (US Bank...  ▼ </div> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <div style="border: 1px solid #ccc; padding: 5px; width: 30%;"> Bank Name* Bank of America  </div> <div style="border: 1px solid #ccc; padding: 5px; width: 30%;"> Country* United States  ▼ </div> <div style="border: 1px solid #ccc; padding: 5px; width: 30%;"> BankKey / ABA* 111000025  </div> </div> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <div style="border: 1px solid #ccc; padding: 5px; width: 45%;"> Bank Account Number* XXXXX6789  </div> <div style="border: 1px solid #ccc; padding: 5px; width: 45%;"> Verify Bank Account Number* XXXXX6789 </div> </div> <div style="text-align: right; margin-top: 20px;"> CANCEL DONE </div> </div> </div>																

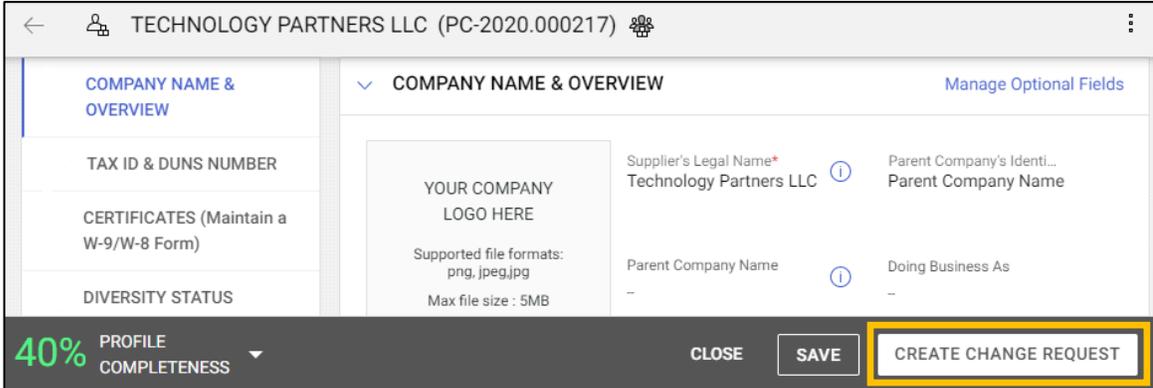
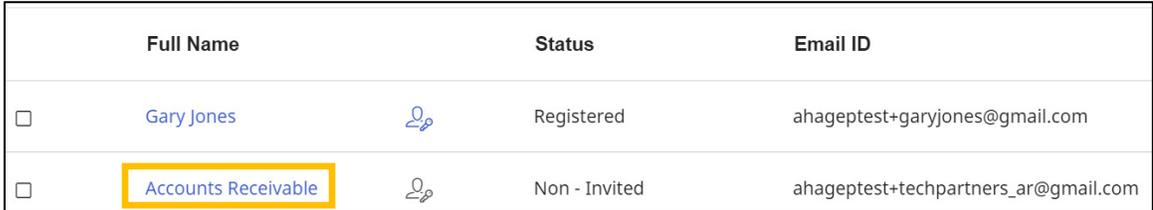
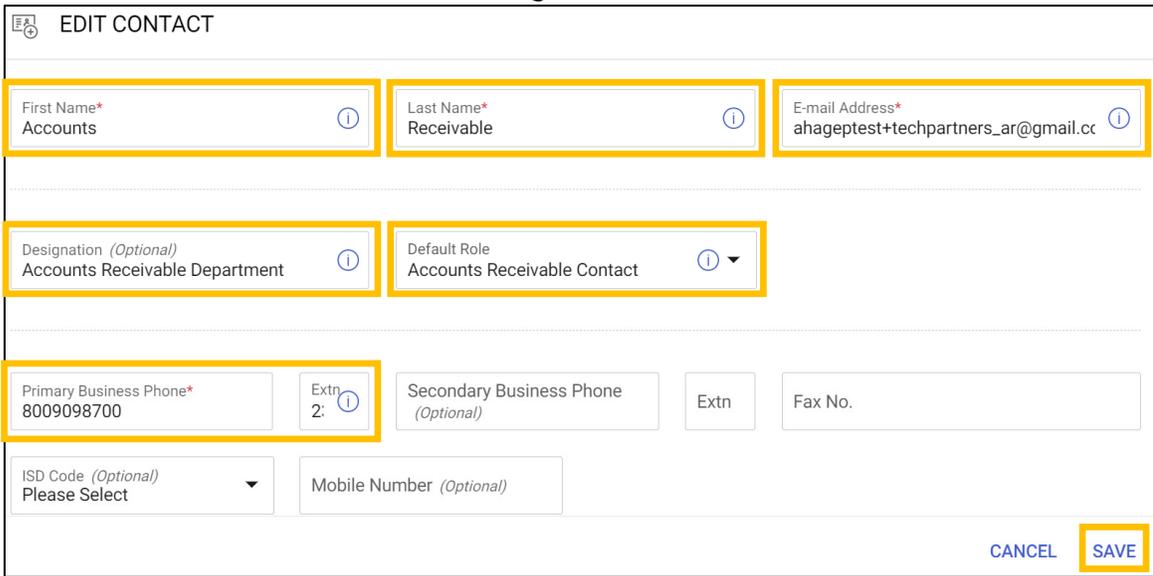
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Step	Description
7	<ul style="list-style-type: none"> Click on the SAVE & CLOSE button at the bottom right of the screen 
8	<ul style="list-style-type: none"> Click on the SUBMIT button at the bottom of the screen to submit your changes 
9	<ul style="list-style-type: none"> AHA will review the change request and contact you if we find any issues. The updated information will take effect only after AHA approves the Change Request

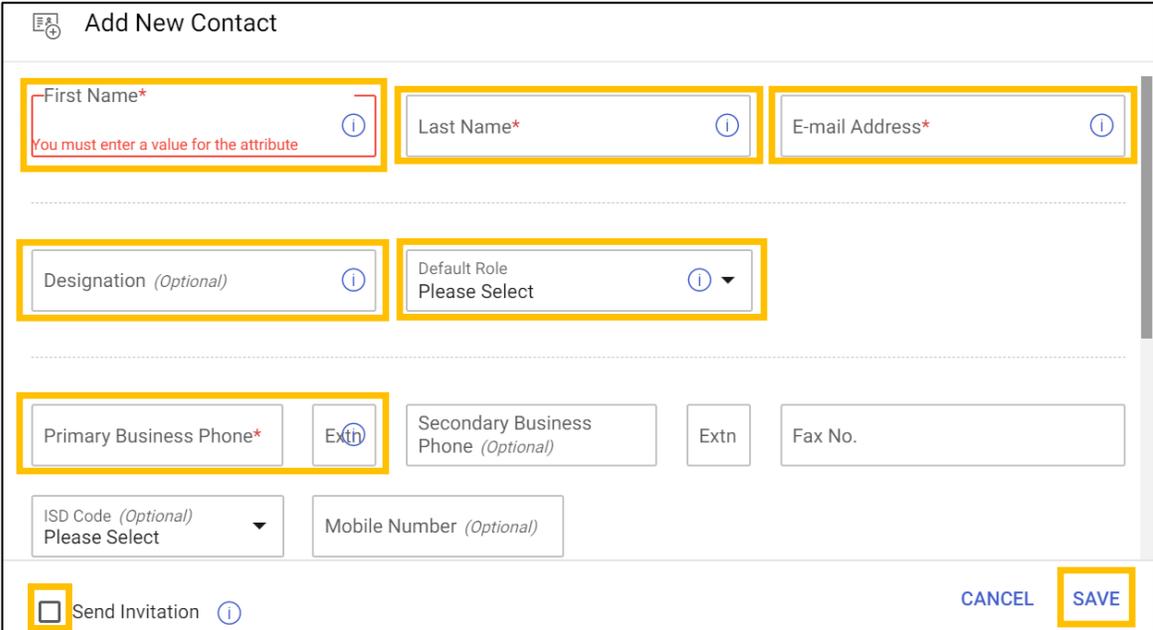
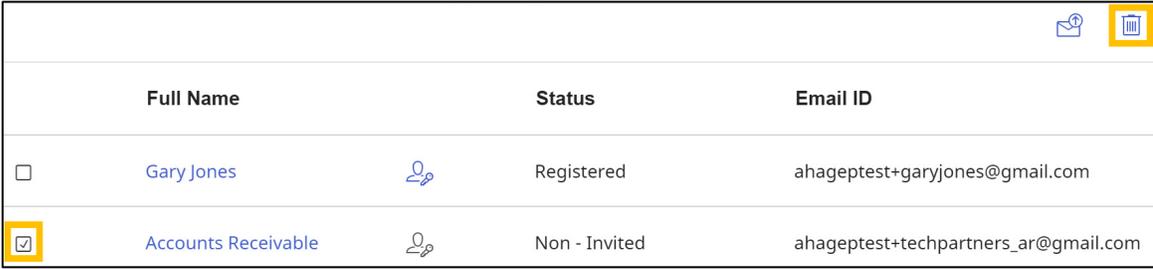
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Update (Add/Change/Delete) Contacts

Please follow the steps listed below to update your business' key contacts. At any time you can Add new contacts, Modify existing contacts, or Delete Existing Contacts

Step	Description												
1	<ul style="list-style-type: none"> Click on the CREATE CHANGE REQUEST button at the bottom right corner of the page 												
2	<ul style="list-style-type: none"> Scroll down to the CONTACTS section, click on the title to open the section 												
3	<ul style="list-style-type: none"> The list of Contacts will display To Edit an existing contact, Click on the name of the contact  <table border="1"> <thead> <tr> <th></th> <th>Full Name</th> <th>Status</th> <th>Email ID</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>Gary Jones</td> <td>Registered</td> <td>ahageptest+garyjones@gmail.com</td> </tr> <tr> <td><input type="checkbox"/></td> <td>Accounts Receivable</td> <td>Non - Invited</td> <td>ahageptest+techpartners_ar@gmail.com</td> </tr> </tbody> </table>		Full Name	Status	Email ID	<input type="checkbox"/>	Gary Jones	Registered	ahageptest+garyjones@gmail.com	<input type="checkbox"/>	Accounts Receivable	Non - Invited	ahageptest+techpartners_ar@gmail.com
	Full Name	Status	Email ID										
<input type="checkbox"/>	Gary Jones	Registered	ahageptest+garyjones@gmail.com										
<input type="checkbox"/>	Accounts Receivable	Non - Invited	ahageptest+techpartners_ar@gmail.com										
4	<ul style="list-style-type: none"> A pop-up will open where you can edit the contact's information Click on the SAVE button at the bottom right of the window 												

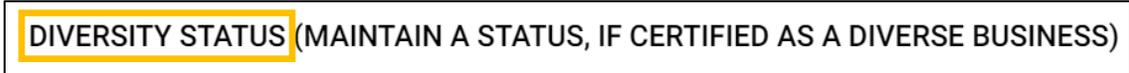
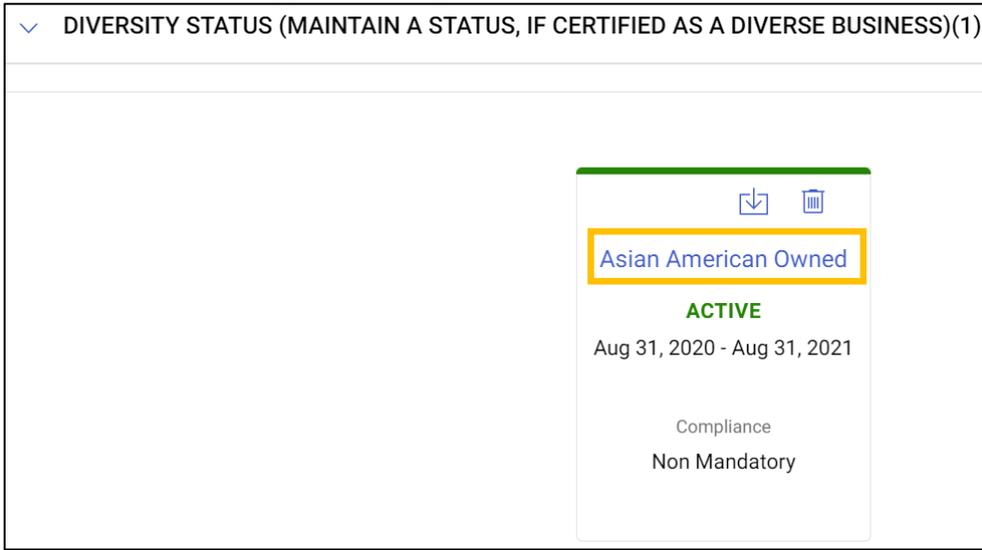
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Step	Description												
5	<ul style="list-style-type: none"> To Add a contact, Click on the (+) Add New Contact button at the right side of the section  												
6	<ul style="list-style-type: none"> A pop-up will open where you will enter/select the following information: <ul style="list-style-type: none"> - First Name & Last Name: Enter the contact's First and Last Name - E-mail Address: Enter the contact's Email - Designation: Enter the individuals job title (ie: A/R Manager) - Default Role: Select the appropriate role the contact will perform for AHA - Primary Business Phone: Enter the contact's phone number. Enter numbers only - Send Invitation (Optional): This allows the contact to register & access the Supplier Portal Click on the SAVE button at the bottom right of the window 												
7	<ul style="list-style-type: none"> To Delete a contact, click on the checkbox to the left of the contact, Click on the Trashcan icon  on upper right corner of the contacts list  <table border="1"> <thead> <tr> <th></th> <th>Full Name</th> <th>Status</th> <th>Email ID</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>Gary Jones</td> <td>Registered</td> <td>ahageptest+garyjones@gmail.com</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>Accounts Receivable</td> <td>Non - Invited</td> <td>ahageptest+techpartners_ar@gmail.com</td> </tr> </tbody> </table>		Full Name	Status	Email ID	<input type="checkbox"/>	Gary Jones	Registered	ahageptest+garyjones@gmail.com	<input checked="" type="checkbox"/>	Accounts Receivable	Non - Invited	ahageptest+techpartners_ar@gmail.com
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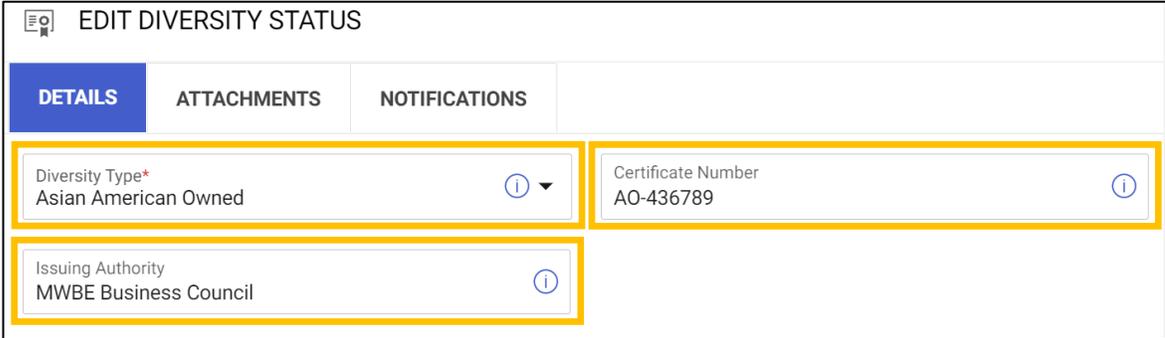
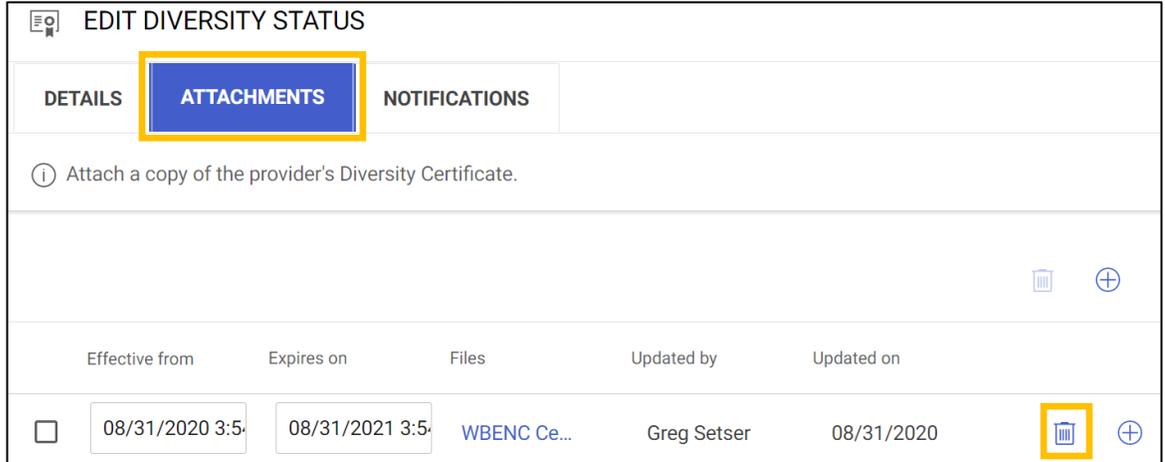
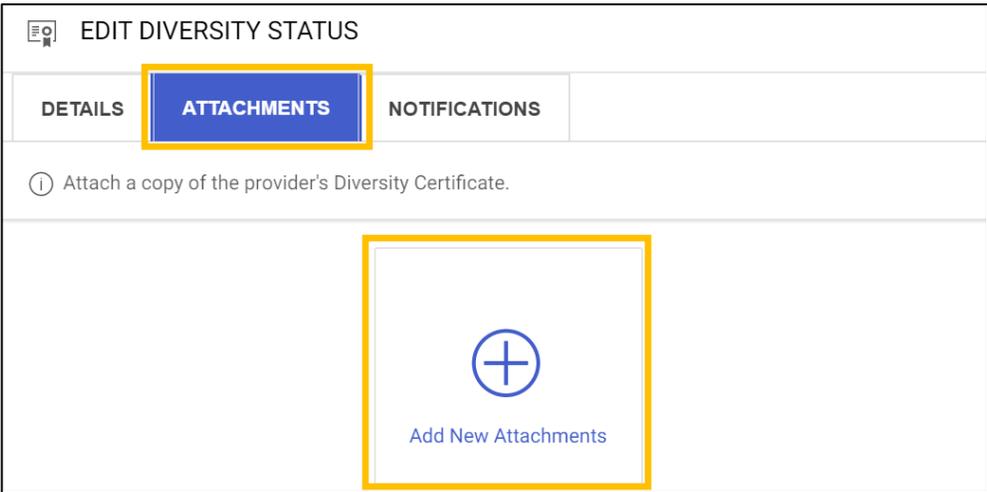
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Update Diversity Status

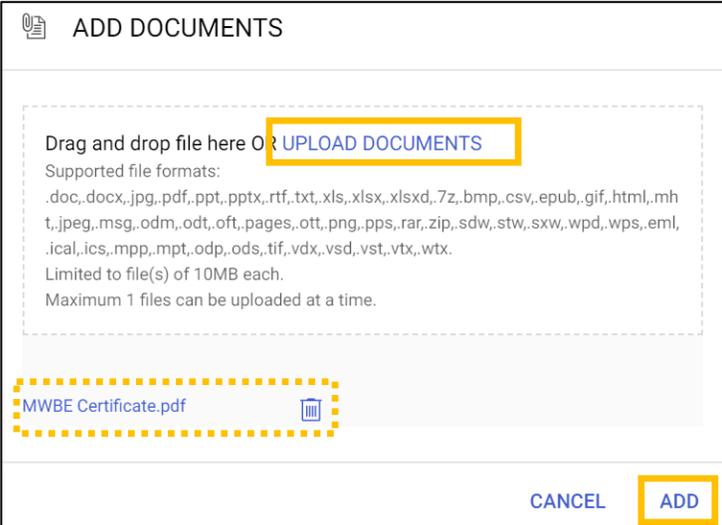
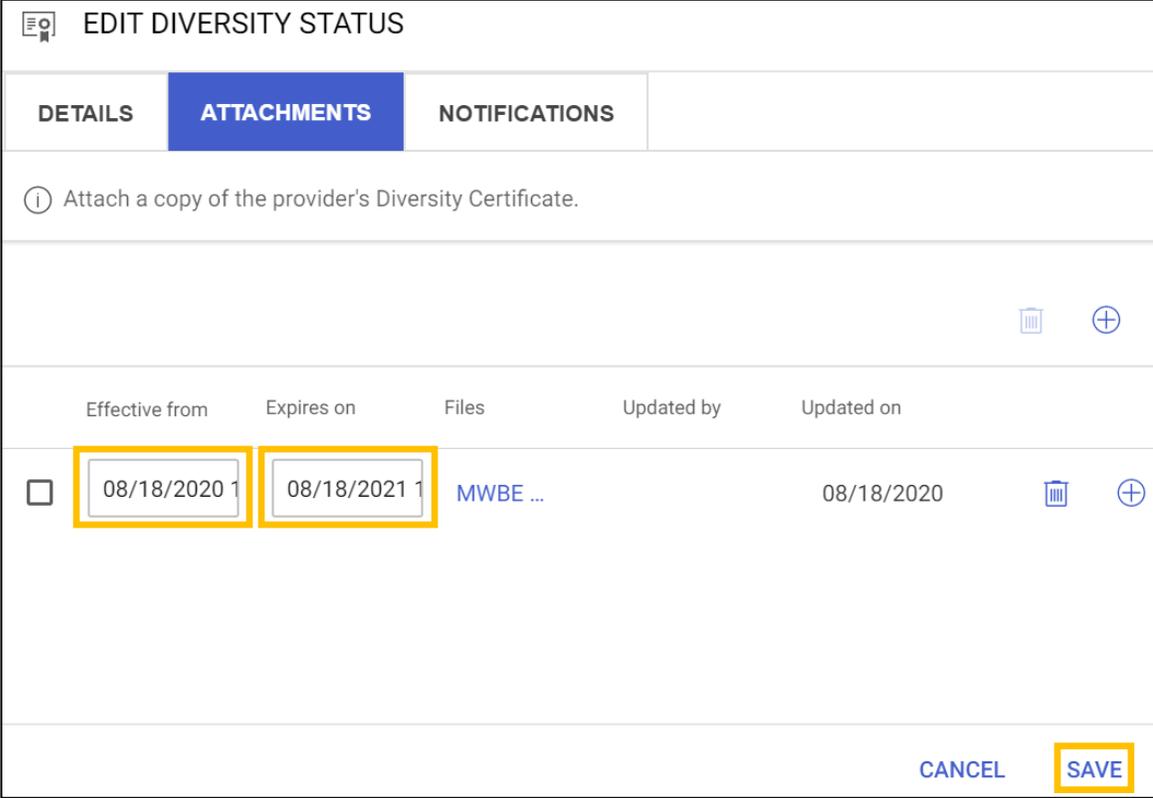
Please follow the steps listed below to update your business' Diversity Status and Diversity Certificate.

Step	Description
1	<ul style="list-style-type: none">Click on the CREATE CHANGE REQUEST button at the bottom right corner of the page  <p>The screenshot shows the profile page for TECHNOLOGY PARTNERS LLC (PC-2020.000217). The page has a sidebar with navigation options: COMPANY NAME & OVERVIEW, TAX ID & DUNS NUMBER, CERTIFICATES (Maintain a W-9/W-8 Form), and DIVERSITY STATUS. The main content area is titled 'COMPANY NAME & OVERVIEW' and includes a 'Manage Optional Fields' link. It features a logo upload section with supported formats (png, jpeg, jpg) and a max file size of 5MB. Below this, there are fields for 'Supplier's Legal Name*' (Technology Partners LLC), 'Parent Company's Ident...' (Parent Company Name), 'Parent Company Name', and 'Doing Business As'. At the bottom, a '40% PROFILE COMPLETENESS' indicator is shown, along with 'CLOSE', 'SAVE', and a highlighted 'CREATE CHANGE REQUEST' button.</p>
2	<ul style="list-style-type: none">Scroll down to the DIVERSITY STATUS section, click on the title to open the section  <p>The screenshot shows the title of the 'DIVERSITY STATUS' section: 'DIVERSITY STATUS (MAINTAIN A STATUS, IF CERTIFIED AS A DIVERSE BUSINESS)'. The text is highlighted with a yellow box.</p>
3	<ul style="list-style-type: none">Click on the name of your diversity status within the tile.  <p>The screenshot shows the 'DIVERSITY STATUS (MAINTAIN A STATUS, IF CERTIFIED AS A DIVERSE BUSINESS)(1)' section. It contains a tile for 'Asian American Owned' which is highlighted with a yellow box. The tile also displays 'ACTIVE' in green, the period 'Aug 31, 2020 - Aug 31, 2021', and 'Compliance Non Mandatory'.</p>

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Step	Description
4	<ul style="list-style-type: none"> A pop window will open where you can edit the following information <ul style="list-style-type: none"> Diversity Status: Classification you are certified under Certificate Number: Enter the number found on your Diversity Certificate. Issuing Authority: Enter the name of the Issuing Authority found on your Certificate 
5	<ul style="list-style-type: none"> If you need to update your certificate, Click the ATTACHMENTS tab at the top of the window Click on the Trashcan icon  on the right side of the line 
6	<ul style="list-style-type: none"> Click on the ATTACHMENTS tab at the top of pop-up window Click on the Add New Attachments tile in the middle of the section 

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Step	Description
7	<ul style="list-style-type: none"> Click on the UPLOAD DOCUMENTS link to find the Certificate you would like to upload Once the upload is complete, the document will appear towards the bottom of the window Click on the ADD button at the bottom right of the window 
8	<ul style="list-style-type: none"> Select the correct Effective date and Expiration date for your certificate Click on the SAVE button at the bottom right of the window 
12	<ul style="list-style-type: none"> Click on the SUBMIT button at the bottom of the screen to submit your changes 