### Create & Submit a Profile Change Request (Approved Suppliers)

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#### 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:
  - o Remit-to Address
  - Preferred Payment Method (ie: Check, ACH, Wire Transfer)
  - o Bank Account Information for ACH or Wire Transfer payment methods
- Contacts including:
  - Account Representatives
  - o 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.

#### 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	• Within your web browser g	no to https://smart.a	ep.com/	
-	<ul> <li>You will be taken to a logi</li> </ul>			me and Password.
	• Press the LOGIN button	···· J··		
		SMART b	GFP	
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		Unified Source-	to-Pay Software	
		<u>Q</u> Username		
	<b>_</b>	Forgot Username?	1. 190	
		-		
		Q Password		
	L .	Forgot Password?		
		Torgot Tassword:		
		LOGI	N	
0				
2	• Once you are logged in, <b>c</b>			the screen
	Click on the Supplier Profi	<b>le</b> icon within the left	menu bar.	
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	Create			
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	<u> </u>			
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3	• You will be taken to your o	company's supplier p	rofile	
	$\leftarrow$ $\  \  \  \  \  \  \  \  \  \  \  \  \ $	ERS LLC (PC-2020.000217	) 器	:
	COMPANY NAME & OVERVIEW	✓ COMPANY NAME & OVE	RVIEW	Manage Optional Fields
	TAX ID & DUNS NUMBER			
			Supplier's Legal Name*	Parent Company's Identi
	CERTIFICATES (Maintain a W-	YOUR COMPANY	Technology Partners LL	Parent Company Na
	9/W-8 Form)	LOGO HERE		
	DIVERSITY STATUS (Maintain a	Supported file formats: png, jpeg,jpg	Parent Company Name	Daing Business As
	Status, if Certified as a Diverse	Max file size : 5MB	-	Doing Business As (i)
	Business)	Resolution : 200 X 200		
		pixel		

### 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	De	scription						
cop	•	<b>Click</b> on the <b>CREATE CHANGE REQUEST</b> button at the bottom right corner of the page						
			NERS LLC (PC-2020.000217		0			
		COMPANY NAME & OVERVIEW	✓ COMPANY NAME & OVE	ERVIEW Manage Optional F	Fields			
		TAX ID & DUNS NUMBER	YOUR COMPANY LOGO HERE	Supplier's Legal Name* Parent Company's Identi Technology Partners LLC Darent Company Name				
		CERTIFICATES (Maintain a W-9/W-8 Form) DIVERSITY STATUS	Supported file formats: png, jpeg,jpg	Parent Company Name Doing Business As				
		40% PROFILE COMPLETENESS	Max file size : 5MB	CLOSE SAVE CREATE CHANGE REQU	JEST			
	•	Scroll to the COMPANY NA		tion, <b>click</b> on the title to open the secti	ion			
	•	Locate the Supplier's Lega	<b>l Name</b> field and upc	date it with your new legal company r	ıame			
		COMPANY NAME & OVER	VIEW	Manage Optional I	Fields			
		YOUR COMPANY LOGO HERE	Supplier's Legal Name* Technology Partner		)			
		Supported file formats: png, jpeg,jpg Max file size : 5MB	Parent Company Name 	Doing Business As	Ó			
	•	Scroll down to the TAX ID &	& DUNS NUMBER sect	tion, <b>click</b> on the title to open the secti	ion			
		> TAX ID & DUNS NUM	IBER					
	•	Locate you Tax ID Number with your company's new		ber field), <b>click</b> on the number, and <b>up</b>	odate it			
		✓ TAX ID & DUNS NUMBER						
		DUNS Number* 890678456						
		Identification type	Number					
		US Federal Tax ID/EIN	655789342*	7				

Stop	De	escription						
6	•	Scroll down to the CERTIFICATES section, click on the title to open the section						
ľ								
		CERTIFICATES (MAINTAIN A W-9/W-8 FORM) (1) (1 Active)						
7	-	Learning the till fourth a MA O MALO Fourier and all the subtract the subtract the till.						
/	•	<b>Locate</b> the tile for the W-9/W-8 Form and click on the name within the tile.						
		✓ CERTIFICATES (MAINTAIN A W-9/W-8 FORM) (1) (1 Active)						
		W-9/W-8 Form						
		ACTIVE						
		Aug 31, 2020 - Aug 31, 2021						
		Compliance						
		Mandatory						
8								
0	•	<b>Click</b> on the <b>ATTACHMENTS</b> tab at the top of pop-up window <b>Click</b> on the <b>Trashcan icon</b> I on the right side of the line						
	•	Elick on the Trashcan icon i on the right side of the line						
		DETAILS ATTACHMENTS NOTIFICATIONS						
		Effective from Expires on Files Updated by Updated on						
		□ 08/31/2020 9:5: 08/31/2021 9:5: W9 Form.p Greg Setser 08/31/2020 11 ↔						
9	•	Click on the Add New Attachments tile in the middle of the section						
		Eg NEW CERTIFICATE						
		DETAILS ATTACHMENTS NOTIFICATIONS						
		Add New Attachments						

Step	De	scription
10	•	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
		ADD DOCUMENTS
		· · · · · · · · · · · · · · · · · · ·
		Drag and drop file here OF UPLOAD DOCUMENTS
		Supported file formats:
		.doc,.docx,.jpg,.pdf,.ppt,.ptx,.rtf,.txt,.xls,.xlsx,.xlsx,.7z,.bmp,.csv,.epub,.gif,.html,.mht ,.jpeg,.msg,.odm,.odt,.oft,.pages,.ott,.png,.pps,.rar,.zip,.sdw,.stw,.sxw,.wpd,.wps,.eml,.i
		cal,ics,.mpp,.mpt,.odp,.ods,.tif,.vdx,.vsd,.vst,.vtx,.wtx.
		Limited to file(s) of 10MB each.
		Maximum 1 files can be uploaded at a time.
		W9 Form.pdf
		CANCEL ADD
11	•	Click on the SAVE button at the bottom right of the window
		Eg NEW CERTIFICATE
		DETAILS ATTACHMENTS NOTIFICATIONS
		Effective from Expires on Files Updated by Updated on
		□ 08/18/2020 9 08/18/2021 9 W9 For □ □ ⊕
		CANCEL SAVE
4.6	_	
12	•	<b>Click</b> on the <b>SUBMIT</b> button at the bottom of the screen to submit your changes
		50% profile delete submit save and exit close save
13	•	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

#### 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.

	scription				
•	<ul> <li>Click on the CREATE CHANGE REQUEST button at the bottom right corner of the particular sectors of the particular sectors and the sectors of the particular sectors and the sectors are sectors at the sectors and the sectors are sectors at the sectors at the sectors are sectors at the sectors at</li></ul>				
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	COMPANY NAME & OVERVIEW	✓ COMPANY NAME & OV	ERVIEW	Manage	e Optional Fields
	TAX ID & DUNS NUMBER	YOUR COMPANY LOGO HERE	Supplier's Legal Name* Technology Partners	LLC D Parent Company's Parent Company	
	DIVERSITY STATUS	Supported file formats: png, jpeg,jpg Max file size : 5MB	Parent Company Name	Doing Business A	S
	40% PROFILE COMPLETENESS -		CLOSE	SAVE CREATE CHA	NGE REQUEST
•	Scroll down to the ADDRE	SS & PAYMENT INFO	section, <b>click</b> o	n the title to oper	n the sectio
	> ADDRESS & PAYMENT			· · · ·	
•	Click on the pencil icon	or <b>Name</b> of the ad	dress line wher	e the <b>Type</b> is <b>Rem</b>	nit To Locati
	✓ ADDRESS & PAYMENT INFO (I	MAINTAIN ONE REMIT-TO AI	DRESS & PAYMENT	METHOD)	d New Location
					<b>©</b>
	□ Location Name ↑	Type ↑ Phone N	os.	Roles & Contacts	
	100 Forest Street	Headquarter Pri : Sec :			ĥ /
	100 Forest Street     Payment Information	Headquarter		as <b>t</b>	6 / 6 /
•		Headquarter Sec : Remit To Location Pri : Sec : You can <b>edit</b> the Rem		Payment Metho	h 🖉
	A screen will open where y To <b>edit</b> the <b>Remit-to Addre</b>	Headquarter Sec : Remit To Location Pri : Sec : you can <b>edit</b> the Rem ess, make changes to	the information	Payment Metho on under <b>ADDRES</b>	h 🖉
	□       Payment Information         A screen will open where y         To edit the Remit-to Addre         ← & LOCATION	Headquarter Sec : Remit To Location Pri : Sec : you can <b>edit</b> the Rem ess, make changes to	the information	Payment Metho on under <b>ADDRES</b>	d S Details
	□       Payment Information         A screen will open where y         To edit the Remit-to Addre         ← & LOCATION         ✓       ADDRESS DETAILS (NOTE: PRE         Location Name*         Payment Information	Headquarter Sec : Remit To Location Pri : Sec : you can edit the Rem ess, make changes to ESS 'SAVE' AFTER ENTERING Address Line 1*	> the information	Payment Metho on under <b>ADDRES</b> Manag	d S Details e Optional Fields
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•	Click on the pencil icon 🖉 on the right side of the line.	
	PAYMENT METHOD (MAINTAIN ONE FORM OF PAYMENT)	
		. ⊕
	Payment Method Bank Name Branch Country Account Type Account Number	
	EFT/ACH (US Bank of America United St XXXXX6789	
	PAYMENT METHOD (Maintain One Form of Payment) Saving with updated Payment Method will replace existing data with respective field's d Payment Method EFT/ACH (US Bank	ata.
	Bank Name*       (i)       Country*       (i) ▼       BankKey / ABA*         Bank of America       (i)       (i) ▼       111000025         Bank Account Number*       Verify Bank Account Number*       Verify Bank Account Number*	(j)
	XXXXX6789 XXXXX6789	

Step	Des	scription						
7	•	Click on the SAVE &	CLOSE but	ton at the bo	ttom righ	nt of the	e screen	
		$\leftarrow$ $\&$ location						
		Location Name* Payment Information	()	Address Line 1* PO Box 3467		(j)	Address Line 2	0
		Country* United States	() •	State* Texas		(i) <b>•</b>	City* Dallas	()
		Zip Code* 75231	()	Choose Location Type Remit To Location		(j)	Primary Business Phone	Extn
		Sec. Business Phone	Extn	Fax No.			PO Box Number 	Ū
		✓ PAYMENT METHOD (M	AINTAIN ONE F	FORM OF PAYMENT	)			
								•
		Payment Method Ban	k Name	Branch	Country	Account Type	Account Number	
		EFT/ACH (US Bar	k of America	-	United St		XXXXX6789	Ø 🗎
							CANCEL SAVE	SAVE & CLOSE
8	•	Click on the SUBMIT	button at ·					
		COMPLETENESS						DSE SAVE
9	•	AHA will review the of The updated informed						e Request

#### 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

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	Click on the CREATE CHANGE REQUEST button at the bottom right corner of the page						
~	쇼 TECHNOLOGY PAR	(TNERS LLC (PC-2020.0002	17) 帶				
	COMPANY NAME & OVERVIEW	✓ COMPANY NAME & O	VERVIEW	Manage Optional Fields			
	TAX ID & DUNS NUMBER	YOUR COMPANY	Supplier's Legal Name Technology Partne	Parent Company's Identi Parent Company Name			
	CERTIFICATES (Maintain a W-9/W-8 Form)	LOGO HERE Supported file formats: png, jpeg,jpg	Parent Company Nam	e 👝 Doing Business As			
	DIVERSITY STATUS	Max file size : 5MB	-	U _			
40	)% PROFILE -		CLOSE	SAVE CREATE CHANGE REQUEST			
Scr	down to the CONT	ACTS section, click or	a tha titla ta ar	on the section			
>	CONTACTS (MAINTA	IN ACCOUNT MANAG	ERS & ACCOUN	ITS RECEIVABLE CONTACTS			
	list of Contacts will c						
To E	<b>dit</b> an existing conta	ict, <b>Click</b> on the name	e of the contact	t			
	Full Name	Statu	s	Email ID			
_							
	Gary Jones	2 <sub>2</sub> Regist	tered	ahageptest+garyjones@gmail.com			
	Gary Jones Accounts Receivable		iered	ahageptest+garyjones@gmail.com ahageptest+techpartners_ar@gmail.co			
	Accounts Receivable	e Op Non -	Invited	ahageptest+techpartners_ar@gmail.co			
D A po	Accounts Receivable	e you can <b>edit</b> the co	Invited	ahageptest+techpartners_ar@gmail.co			
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A po Clic	Accounts Receivable op-up will open wher <b>k</b> on the <b>SAVE</b> buttor	e you can <b>edit</b> the co	Invited	ahageptest+techpartners_ar@gmail.co			
A po Clic	Accounts Receivable op-up will open wher k on the SAVE buttor EDIT CONTACT	Non - re you can <b>edit</b> the co n at the bottom right	Invited ntact's informa of the window	ahageptest+techpartners_ar@gmail.co			
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□ A po Clic EF First Acc Des Acc Prim	Accounts Receivable op-up will open where k on the SAVE buttor EDIT CONTACT Name* counts in Ame* counts Receivable Department	Point Non-     P	Invited ntact's informa of the window ①	ahageptest+techpartners_ar@gmail.co			
A po Clic First Acc Desi Acc	Accounts Receivable  pp-up will open wher  k on the SAVE buttor  EDIT CONTACT  Name*  Sounts  Sounts  Sounts Receivable Department  ary Business Phone*  9098700  Code (Ontional)  Code (Ontional	Point Secondary Business P	Invited ntact's informed of the window Contact	ahageptest+techpartners_ar@gmail.co ation E-mail Address* ahageptest+techpartners_ar@gmail.cc			

Step	Des	scription		
5	•	To Add a contact, Click on the (+) Add No	ew Contact button a	at the right side of the section
		> CONTACTS (MAINTAIN ACCOUNT MANAGERS	& ACCOUNTS RECEIVAB	LE CONTACTS)    Add New Contact
6	•	<ul> <li>A pop-up will open where you will enter/</li> <li>First Name &amp; Last Name: Enter the contact's E</li> <li>Designation: Enter the individuals joil</li> <li>Default Role: Select the appropriate</li> <li>Primary Business Phone: Enter the contact of Send Invitation (Optional): This allow</li> <li>Click on the SAVE button at the bottom in</li> </ul>	ontact's First and Las mail o title (ie: A/R Manas role the contact will ntact's phone numb vs the contact to reg	st Name ger) I perform for AHA per. Enter numbers only
		E Add New Contact		
		First Name*		E-mail Address*
		Designation (Optional)	ct 🧻 🗸	
		Primary Business Phone* Ext Phone (Opti		Fax No.
		ISD Code (Optional) Please Select  Mobile Number (Option  Send Invitation	al)	CANCEL SAVE
7	•	To <b>Delete</b> a contact, <b>click</b> o <u>n t</u> he <b>checkbo</b>	<b>x</b> to the left of the c	contact,
	•	Click on the Trashcan icon 🔟 on upper r	ight corner of the co	ontacts list
		Full Name	Status	Email ID
		Gary Jones	Registered	ahageptest+garyjones@gmail.com
		Accounts Receivable	Non - Invited	ahageptest+techpartners_ar@gmail.com
8	•	Click on the SUBMIT button at the botton 50% PROFILE COMPLETENESS	m of the screen to su	Abmit your changes

#### Update Diversity Status

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

Step	Description					
1	•	Click on the CREATE CHAN	-		corner of the page	
		← 쓰 TECHNOLOGY PART	NERS LLC (PC-2020.00021	7) 器	:	
		COMPANY NAME & OVERVIEW	✓ COMPANY NAME & OV	ERVIEW	Manage Optional Fields	
		TAX ID & DUNS NUMBER	YOUR COMPANY	Supplier's Legal Name* () Technology Partners LLC	Parent Company's Identi Parent Company Name	
		CERTIFICATES (Maintain a W-9/W-8 Form)	LOGO HERE Supported file formats:	Parent Company Name	Doing Business As	
		DIVERSITY STATUS	png, jpeg,jpg Max file size : 5MB	-	-	
		40% PROFILE COMPLETENESS		CLOSE SAVE	CREATE CHANGE REQUEST	
2	•	Scroll down to the DIVERS	ITY STATUS section, o	click on the title to op	en the section	
		DIVERSITY STATUS (M	AINTAIN A STATUS,	IF CERTIFIED AS A D	IVERSE BUSINESS)	
3	•	Click on the name of your		in the tile. TIFIED AS A DIVERSE BUS	SINESS)(1)	
				Asian American Owned		
			,	Aug 31, 2020 - Aug 31, 2021		
				Compliance Non Mandatory		

Step	De	escription
4	•	<ul> <li>A pop window will open where you can edit the following information</li> <li>Diversity Status: Classification you are certified under</li> <li>Certificate Number: Enter the number found on your Diversity Certificate.</li> <li>Issuing Authority: Enter the name of the Issuing Authority found on your Certificate</li> </ul>
		EDIT DIVERSITY STATUS
		DETAILS ATTACHMENTS NOTIFICATIONS
		Diversity Type* Asian American Owned (i) ◄ Certificate Number AO-436789 (i)
		Issuing Authority MWBE Business Council
5	•	If you need to update your certificate, <b>Click</b> the <b>ATTACHMENTS</b> tab at the top of the window <b>Click</b> on the <b>Trashcan icon</b> on the right side of the line
		Eg EDIT DIVERSITY STATUS
		DETAILS ATTACHMENTS NOTIFICATIONS
		i Attach a copy of the provider's Diversity Certificate.
		Effective from Expires on Files Updated by Updated on
		□ 08/31/2020 3:5 08/31/2021 3:5 WBENC Ce Greg Setser 08/31/2020
6	•	Click on the <b>ATTACHMENTS</b> tab at the top of pop-up window Click on the <b>Add New Attachments</b> tile in the middle of the section
		EDIT DIVERSITY STATUS
		DETAILS ATTACHMENTS NOTIFICATIONS
		() Attach a copy of the provider's Diversity Certificate.
		Add New Attachments

Step	Des	scription
7	•	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 <b>Click</b> on the <b>ADD</b> button at the bottom right of the window
		B ADD DOCUMENTS
		Drag and drop file here O UPLOAD DOCUMENTS
		Supported file formats: .doc,.docx,.jpgpdf,.ppt,.ptx,.rtf,.txt,.xls,.xlsx,.xlsxd,.7z,.bmp,.csv,.epub,.gif,.html,.mh t,.jpeg,.msg,.odm,.odt,.oft,.pages,.ott,.png,.pps,.rar,.zip,.sdw,.stw,.sxw,.wpd,.wps,.eml, .ical,.ics,.mpp,.mpt,.odp,.ods,.tif,.vdx,.vsd,.vst,.vtx,.wtx. Limited to file(s) of 10MB each. Maximum 1 files can be uploaded at a time.
		MWBE Certificate.pdf
		CANCEL ADD
8		<b>Select</b> the correct <b>Effective</b> date and <b>Expiration</b> date for your certificate <b>Click</b> on the <b>SAVE</b> button at the bottom right of the window
	-	Eg EDIT DIVERSITY STATUS
		DETAILS ATTACHMENTS NOTIFICATIONS
		(i) Attach a copy of the provider's Diversity Certificate.
		<b>I</b>
		Effective from Expires on Files Updated by Updated on
		□ 08/18/20201 08/18/20211 MWBE 08/18/2020 🔟 🕀
		CANCEL SAVE
12	•	Click on the SUBMIT button at the bottom of the screen to submit your changes
		50% PROFILE COMPLETENESS