9.2 Adding Providers/Vendors

Purpose: Use this document to add providers and/or vendors in the Vendor Information page in ctcLink.

Audience: Benefits Administrator.

A benefit provider is a vendor. A benefit provider is the entity that sponsors the benefit plan that your company offers your employees. You use the Provider/Vendor Table to set up an ID for each vendor.

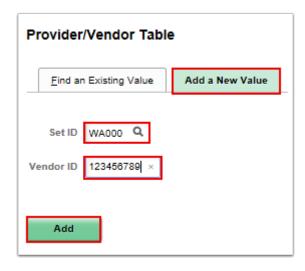
- You must have at least one of these local college managed security roles:
- ZD_BN_VIEW_PLANS_PROVIDERS

If you need assistance with the above security roles, please contact your local college supervisor or IT Admin to request role access.

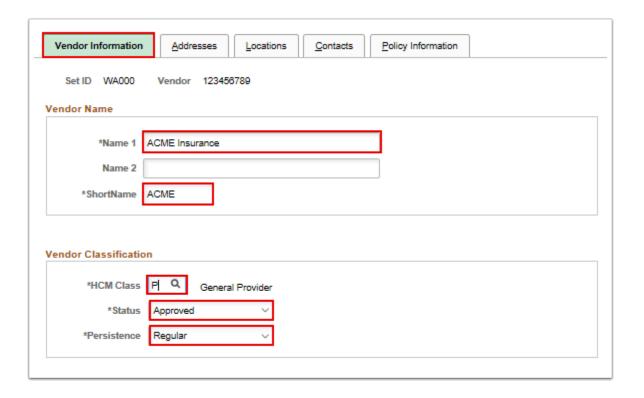
Add Providers/Vendors

Navigation: NavBar > Navigator > Set Up HCM > Product Related > Base Benefits > Plans and Providers > Provider/Vendor Table

- 1. The Provider/Vendor Table search page displays.
- 2. Select the **Add a New Value** tab.
- 3. Enter valid info into the **Set ID** field.
- 4. Enter valid info into the **Vendor ID** field.
- 5. Select Add.

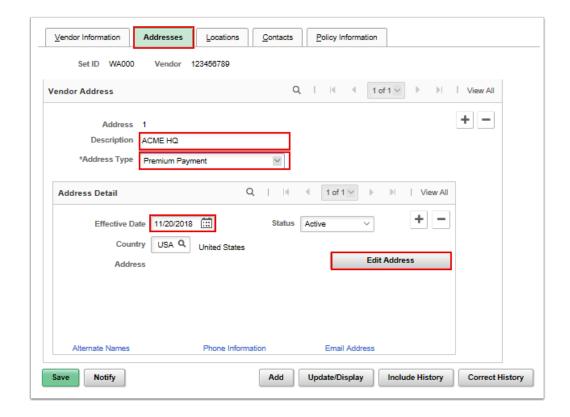


- 6. The Provider/Vendor Table page displays.
- 7. The Vendor Information tab is used to create the vendor code and identify the name and type of the vendor you are entering.
- 8. In the Vendor Name section, enter valid info into the **Name 1** field.
- 9. Enter valid info into the **ShortName** field.
- 10. In the Vendor Classification section, The **HCM Class** field identifies the HRMS classification used to create views so you see the appropriate vendors on the appropriate tables.
 - a. For General Providers the class is P.
 - For HCM vendors, Approved is the default selection in the Status field. Accept this
 default.
 - c. **Regular** is the default selection in the **Persistence** field. Accept this default.

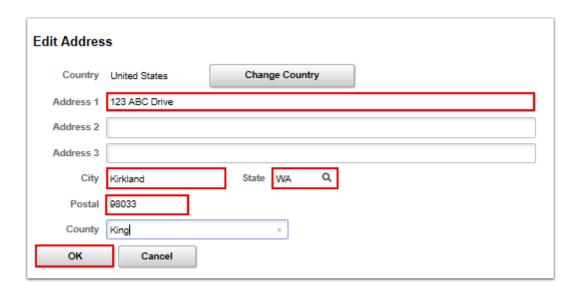


- 11. Select the **Addresses** tab. Use the Addresses page to enter a vendor's address information.
- 12. The Addresses tab displays.

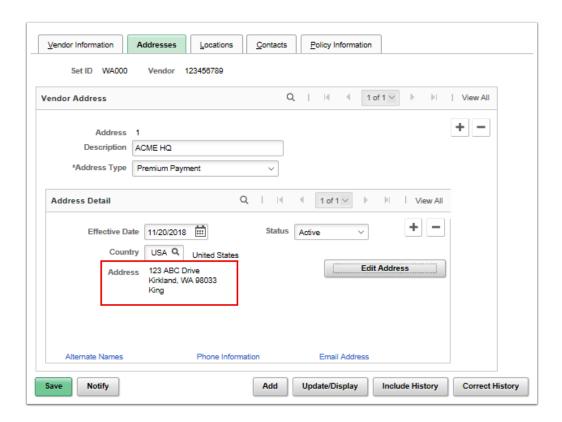
- 13. Enter valid information into the **Description** field.
- 14. Use the Address Type field to select the type of business address you are entering.
- 15. Enter valid value into the **Effective Date** field.
- 16. Select the **Edit Address** button (Use the Edit Address page to add or edit vendor address details).



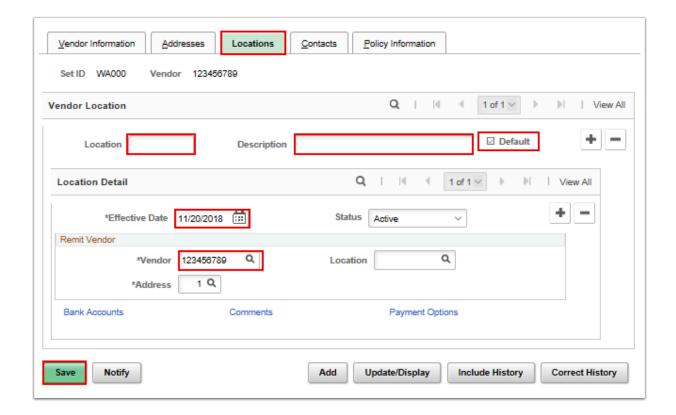
- 17. The Edit Address pagelet displays.
- 18. Enter valid value into the **Address 1** field.
- 19. Enter valid value into the **City** field.
- 20. Enter valid value into the **State** field.
- 21. Enter valid value into the **Postal** field.
- 22. Select the **OK** button.



23. The Address tab displays with updated information.



- 24. Select the **Locations** tab.
- 25. Use the Locations page to enter locations for the vendor. Each vendor must have one default location, but can also have multiple locations, including an:
 - Invoicing From,
 - · Remit To
 - and Return To Location.
- 26. Enter the desired information into the **Description** field.
- 27. Enter valid value into the **Effective Date** field. (Use the Effective Date field to enter the date on which the location for this vendor becomes active).
- 28. Note that the **Vendor** field displays the name of the vendor receiving the payments.
- 29. Select Save.



- 30. The process for adding a provider/vendor is now completed.
- 31. End of procedure.