


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**.

Provider/Vendor Table

Find an Existing Value **Add a New Value**

Set ID

Vendor ID

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**.
 - b. 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.

Vendor Information Addresses Locations Contacts Policy Information

Set ID WA000 Vendor 123456789

Vendor Name

*Name 1

Name 2

*ShortName

Vendor Classification

*HCM Class General Provider

*Status

*Persistence

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).

Vendor Information | **Addresses** | Locations | Contacts | Policy Information

Set ID WA000 Vendor 123456789

Vendor Address

Address 1

Description ACME HQ

*Address Type Premium Payment

Address Detail

Effective Date 11/20/2018 Status Active

Country USA United States

Address

Edit Address

Alternate Names Phone Information Email Address

Save Notify Add Update/Display Include History Correct History

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.

Edit Address

Country United States Change Country

Address 1 123 ABC Drive

Address 2

Address 3

City Kirkland State WA

Postal 98033

County King

OK Cancel

23. The Address tab displays with updated information.

The screenshot shows a web application interface for managing vendor information. At the top, there are tabs for 'Vendor Information', 'Addresses' (which is selected and highlighted in green), 'Locations', 'Contacts', and 'Policy Information'. Below the tabs, the 'Set ID' is 'WA000' and the 'Vendor' is '123456789'. The main section is titled 'Vendor Address' and contains a list of addresses. The first address, 'Address 1', is expanded to show details. The details include a 'Description' of 'ACME HQ', an '*Address Type' of 'Premium Payment', an 'Effective Date' of '11/20/2018', a 'Status' of 'Active', and a 'Country' of 'USA' (United States). The address itself is '123 ABC Drive, Kirkland, WA 98033, King'. A red box highlights the address text. There is an 'Edit Address' button next to the address. At the bottom of the form, there are buttons for 'Save', 'Notify', 'Add', 'Update/Display', 'Include History', and 'Correct History'.

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**.

Vendor Information
Addresses
Locations
Contacts
Policy Information

Set ID WA000 Vendor 123456789

Vendor Location
1 of 1
View All

Location
Description
☒ Default
+ -

Location Detail
1 of 1
View All

*Effective Date 11/20/2018
Status Active
+ -

Remit Vendor
*Vendor 123456789
Location
*Address 1

Bank Accounts
Comments
Payment Options

Save
Notify
Add
Update/Display
Include History
Correct History

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