

Online Submission of Vendor Maintenance Request Form (AP-SW-502)

Overview

Vendor additions and updates are made in Cardinal by submitting a properly completed Vendor Maintenance Request form (Cardinal AP-SW-502) to the Commonwealth Vendor Group. Select individuals at each agency may request/approve vendors to be added or updated in the Cardinal Vendor Table through the Department of Accounts Secure Forms Website. The system will require two roles for each agency, a requestor and an approver. The requestor will enter the vendor maintenance information into the form in the system, and route it to an agency approver who will submit to CVG electronically. The Secure Forms Site provides agencies with a secure method of transmitting and reviewing vendor maintenance requests with CVG.

For instructions regarding completing the vendor request form, please see **Instructions for Completing the Vendor Maintenance Request Form**, located in the Statewide Toolbox on the Cardinal Project Site and on the DOA website on the Commonwealth Vendor Group link.

The Commonwealth Vendor Group will provide login credentials to all current preparers and approvers as a system rollout. For future requests, CVG will provide each agency with additional login credentials when a completed Agency Signature Authorization for Vendor Maintenance form has been submitted by the agency.

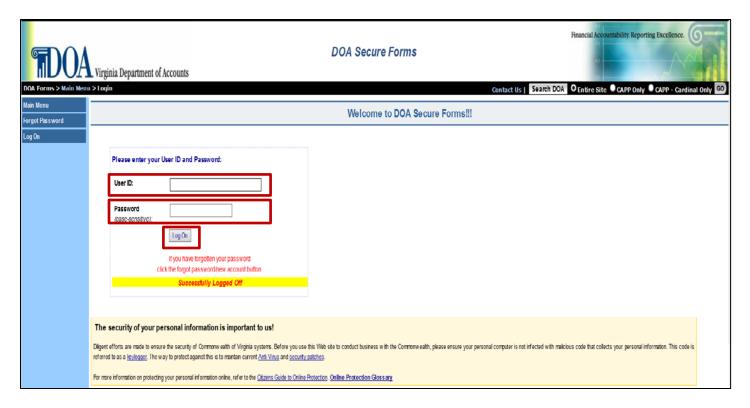
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Form Preparation:

Navigate to the Virginia Department of Accounts Secure Forms Website (https://forms.doa.virginia.gov/Main Menu.cfm).

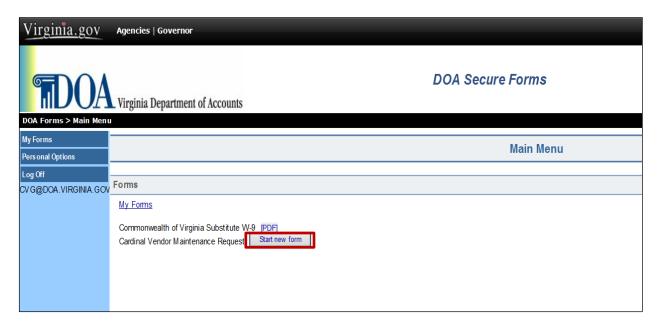


- 1 Enter your **User ID** (provided by CVG).
- 2 Enter your Password.
- 3 Select the Log On button.

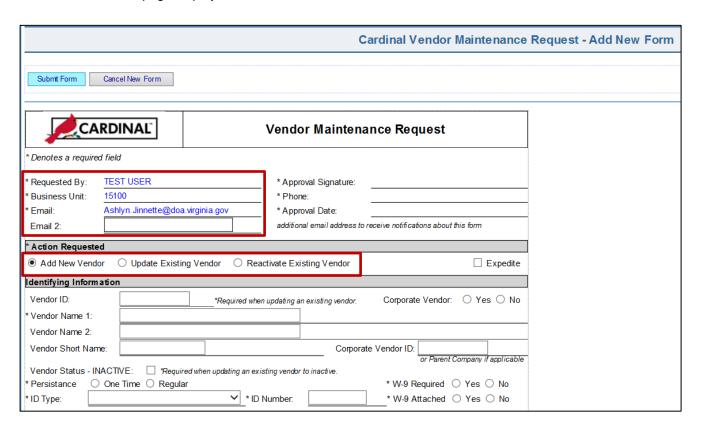
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4 The Main Menu page displays. Select the **Start new form** button.



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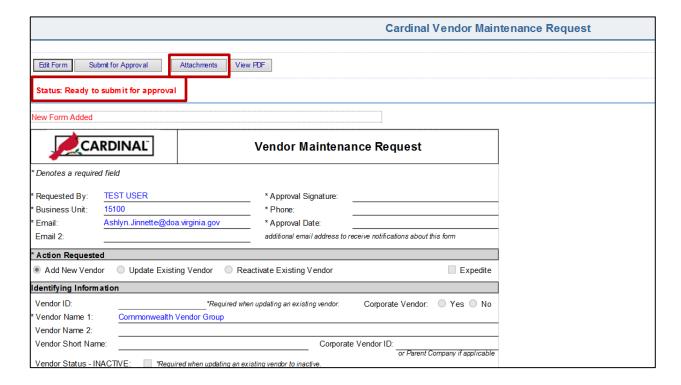


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- 5 The **Vendor Maintenance Request Form** page displays. The following fields automatically populate based on your login information:
 - a. Requested By
 - b. Business Unit
 - c. Email
- 6 Complete the form based upon desired action: Add New Vendor, Update Existing Vendor, or Reactivate Existing Vendor (See Instructions for the Vendor Maintenance Request Form).

Note: All required fields are denoted with an asterisk (*). Reactivating an existing vendor does not require address information to be completed.

- 7 Once all pertinent information has been entered, select the **Submit Form** button.
- 8 The form updates its status to "Ready to submit for approval."



- **9** You can now review all the information on the page.
- 10 If an attachment is required, navigate to the attachments page and upload any relevant documentation. Such as a properly completed Commonwealth of Virginia Substitute W-9.

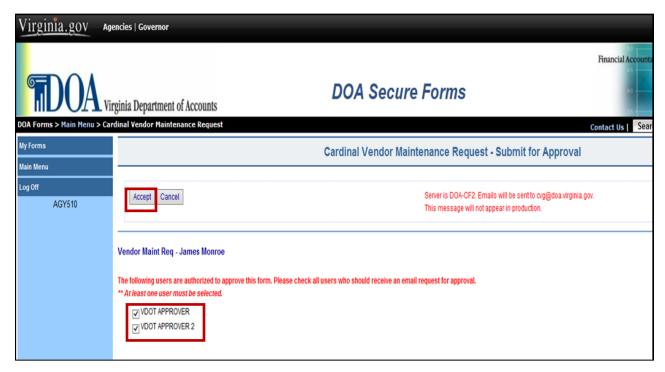
Select **Return to Form** when complete.

11 Once the form is complete, select Submit for Approval.

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12 Each agency has the opportunity to submit vendor requests to any number of authorized approvers. Select the approver(s) that the vendor form should be submitted to, by clicking in the box.

Note: Each request must be submitted to a single user email address. CVG is unable to create group emails as user ids per security standards.

13 Select Accept to submit the vendor request form to an authorized agency approver.

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Agency Approval Process:

DOA Vendor Maintenance Request Form - Approval Needed

CVg@doa.virginia.gov

Sent: Mon 7/13/2015 11:54 AM

To: CVG (DOA)

A new Cardinal Vendor Maintenance Request Form has been submitted by VDOT USER and is awaiting agency approval.

Agency: 510

Form Vendor Maint Req - James Monroe

Description:
Form ID: 3019

DOA Secure Forms: https://forms.doa.virginia.gov/Main Menu.cfm

This email was sent to the following email address(es):
carlton.mckinnon@doa.virginia.gov

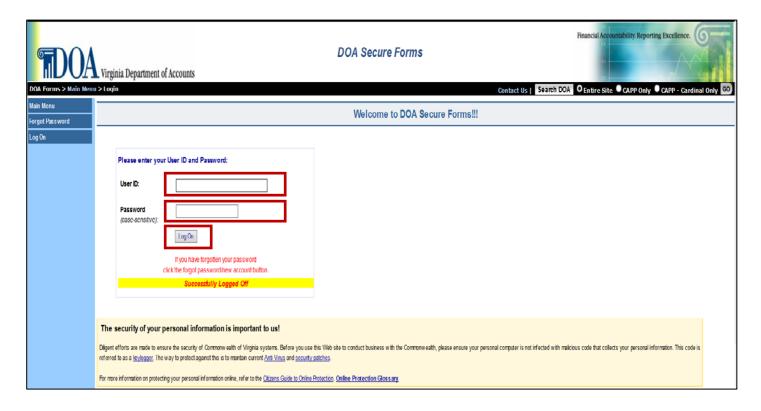
If you have received this email in error, please disregard.

- 1 Once a VMRF is submitted for approval, the agency's designated approver(s) receive an email stating that a request form is awaiting approval.
- 2 Make a note of the **Form ID** listed in the message.
- 3 Navigate to the Virginia Department of Accounts Secure Forms website to approve the request (https://forms.doa.virginia.gov/Main Menu.cfm).

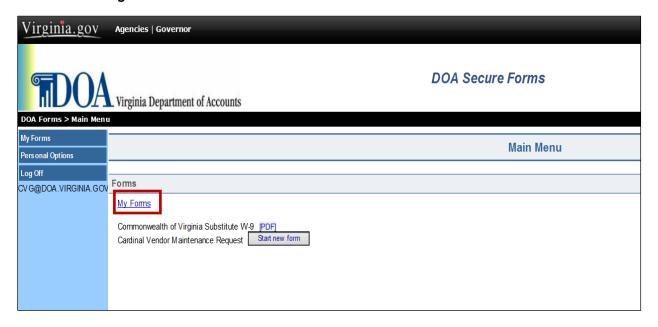
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- 4 Login using your credentials (User Name and Password).
- 5 Select the **Log On** button.

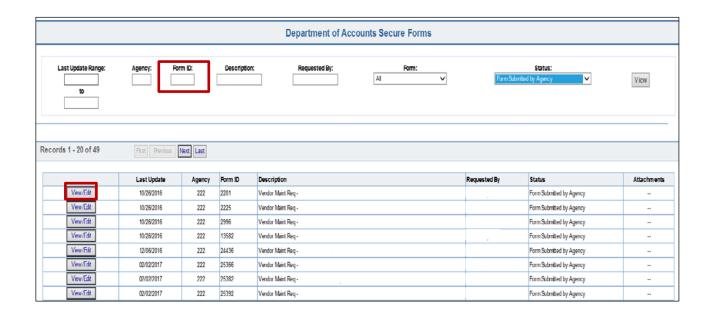


6 Select My Forms.

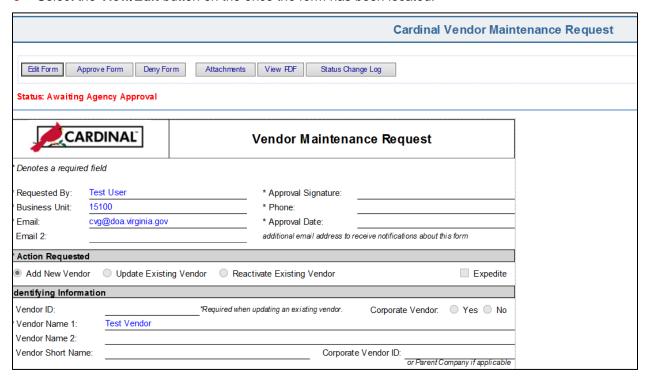
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- 7 Search by entering the form ID in the Form ID field at the top of the page.
- 8 Select the View/Edit button on the once the form has been located.



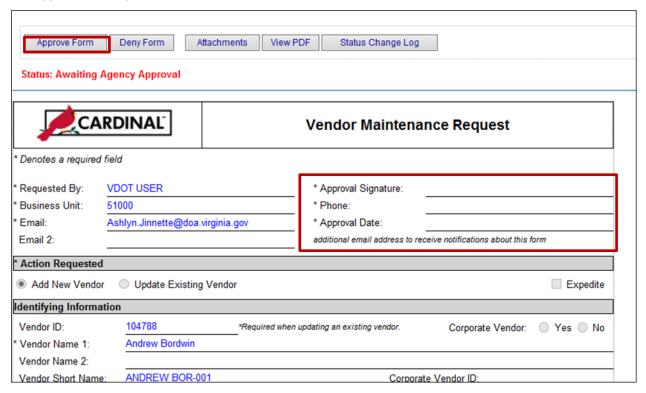
9 Review the vendor form.

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- 10 Select the Deny Form button if the form contains missing information or if corrections are required. This will send the form back to the Preparer with comments via email. The Preparer can then update and resubmit the form.
- 11 Select the **Edit Form** button if the requestor is not able to make the necessary updates to the request. In this scenario, the current approver becomes the new requestor, and will not be able to approve the request.



- 12 Select the **Approve Form** button if the form has been completed accurately.
- 13 The VMRF is then populated with an e-signature for the authorized approver. The form will then route to CVG.

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CVG Review:

- 1 Once the form is submitted, CVG will receive an email regarding the new request and process it accordingly.
- 2 After the request has been received and reviewed, the CVG will continuously update the status on the vendor form. This will give each agency real time updates on the current status of a particular request. See specific status options on page 11.
- 3 Once the vendor has been added in Cardinal and approved by the CVG staff, the agency's Preparer and Approver will receive an email update regarding the vendor request. See example below.

DOA Vendor Maintenance Request Form - Status Update

cvg@doa.virginia.gov

Sent: Mon 7/13/2015 12:47 PM

To: CVG (DOA)

The status of the following form has been updated to "Approved" by the Department of Accounts.

Vendor Maint Req - James Monroe

Vendor has been approved and is available for use. #0000012345

You do not need to take any action at this time.

DOA Secure Forms: https://forms.doa.virginia.gov/Main Menu.cfm

This email was sent to the following email address(es): Carlton.McKinnon@doa.virginia.gov.

If you have received this email in error, please disregard.

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Status Updates for the Vendor Form:

1 Throughout the vendor review process, the CVG will continuously provide updates on the status of the agency vendor maintenance request form. Seen below, is a sample email relating to a status update, and all of the updates statuses that are available.

DOA Vendor Maintenance Request Form - Status Update

cvg@doa.virginia.gov

Sent: Mon 7/13/2015 12:41 PM

To: CVG (DOA)

The status of the following form has been updated to "Incomplete with errors" by the Department of Accounts.

Vendor Maint Req - James Monroe Vendor Form Not Signed John Doe CVG Analyst

Please review the form and make any requested changes.

DOA Secure Forms: https://forms.doa.virginia.gov/Main Menu.cfm

This email was sent to the following email address(es): carlton.mckinnon@doa.virginia.gov.

If you have received this email in error, please disregard.

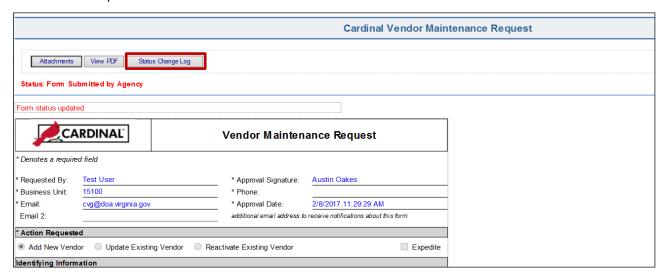
Status Details:		
Description	Agency will have to resubmit	Status on "My Forms"
incomplete with errors	Yes	Awaiting Agency Action
n review	No	Awaiting DOA Action
DOA Awaiting Further Information	Yes	Awaiting Agency Action
Awaiting Agency Approval	Yes	Awaiting Agency Action
Form Submitted by Agency	No	Awaiting DOA Action
Complete/Waiting Approval	No	Awaiting DOA Action
Ready to submit for approval	Yes	Awaiting Agency Action
Denied - Awaiting Further Information	Yes	Awaiting Agency Action
Approved	No	Complete

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2 Each agency will also have the opportunity to review a log of all status changes that have been made for a particular form. This can be done by selecting **Status Change Log**, while reviewing the vendor form. See examples below.



Date/Time	Description	User ID
04/06/2015 10:53:16 AM	Form submitted for agency approval by VDOT USER; Approval Request Emails were sent to ashlyn, jinnette@doa.virginia.gov	AGY510
04/06/2015 12:48:16 PM	Vendor Maintenance Form approved and submitted by VDOT APPROVER	AGY510A
04/10/2015 11:09:00 AM	Status updated by DOA to "In Review"	AGYDOA
04/10/2015 11:40:09 AM	Status updated by DOA to "Awaiting Further Information" - Please attach W9	AGYDOA
04/10/2015 12:04:03 PM	Form submitted for agency approval by VDOT USER; Approval Request Emails were sent to ashlyn, jinnette@doa.virginia.gov	AGY510
04/10/2015 12:48:16 PM	Vendor Maintenance Form approved and submitted by VDOT APPROVER	AGY510A
04/11/2015 12:57:30 PM	Status updated by DOA to "Approved"	ACT12345

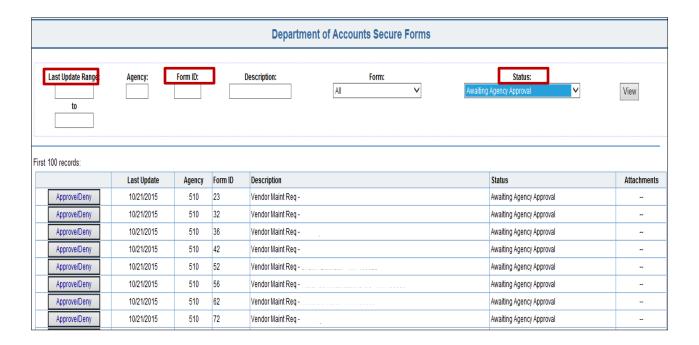
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My Forms Page

1 The **My Forms** page allows agency users to access vendor maintenance request forms, review request forms, and filter/search upon different criteria relating to each request for their agency.



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