SOP NO: SOP-PURCH-25

SUBJECT: TSM User Role Use Defined for Tax Department

SOURCE: Office of Procurement Services

ORIGINAL DATE OF ISSUE: 09/03/2020

DATE OF LAST REVISION: NA

DISCLAIMER: The information provided in this Standard Operating Procedure (SOP) is designed to provide helpful information on this procedure. Purchasing reserves the right to determine on a case by case basis if a SOP should be adjusted for a particular situation. This SOP is not intended to cover each and every situation nor can it anticipate specific circumstances.

RATIONALE: As responsibility for the supplier records shifted primarily to the MDM, Tax UA role has been re-evaluated to determine appropriate permissions assignment to the Tax department staff. Fields that routinely need review and modification by the Tax Department have been determined and reviewed. Purchasing has confirmed that the current permissions in the Tax UA user role are appropriate to meet business needs. This will accommodate the Tax department business need to modify the outlined acceptable fields without needing to submit a Supplier Edit Request form to MDM. This decision is based on efficiency and time management considerations. Due to system limitation to segregate permissions on a micro level, the Tax UA role allows more permission than is required for Tax business need. This SOP will clarify what fields Tax UA will manipulate, and any other supplier record field not addressed here will require a Supplier Edit Request to be submitted to MDM. Also, TAX UA will never create a supplier record, but will always submit a Supplier Request Form to purchasing for creating records.

PROCEDURES: Fields that Tax will update or modify on supplier record:
1. About/General Tab:
   - Legal Structure
   - U.S. Tax Identification Number
   - Legal Structure Sub-Classification
   - Backup Withholding Start Date
   - Backup Withholding End Date
2. About/Additional Information Tab:

GIIN Code
Additional Information
Supplier Information
Supplier Type (Not visible to Supplier)  
GIIN Code  

3. Workflow and Review Tab:
Internal Notes

4. Legal and Compliance/Tax Tab:
Add/Edit Tax Information

5. Legal and Compliance/Tax Custom Fields Tab:
All Fields

6. Legal and Compliance/Tin Information Tab:
Add/Edit Status

DEFINITIONS:
CROSS REFERENCE: