Doing Business with the State of Oklahoma
A Guide to Vendor Registration

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DOING BUSINESS WITH THE STATE OF OKLAHOMA
VENDOR REGISTRATION

WHY REGISTER TO DO BUSINESS WITH THE STATE OF OKLAHOMA?

*Oklahoma is working to improve state resources and build public and private partnerships with its vendors. The state is continually seeking to improve benefits to vendors and state stakeholders through improved services and technology applications. The Online Vendor Registration Portal creates an easier and faster procurement transaction system for both buyers and vendors.*

Vendor Benefits

*Automated Notification*

Registered vendors receive automated email notifications of open solicitations. Notifications are customized to the specific products and services you provide based on the UNSPSC Category Codes you note within the registration process.

*Expedited Transactions*

- Faster bidding.
- Faster award.
- Faster payments.

*24/7 Online Access*

Online PeopleSoft eSupplier Account Access showing all account activity including:

- Payment activity.
- Procurement activity.
- Solicitation opportunities.
- Up-to-date company information.

State Law Compliance

Pursuant to 74 O.S. § 85.33.B, acquisitions issued by agencies under the authority of Title 74 require vendors, including sole source vendors, to complete vendor registration prior to award. Vendors will not be required to register to submit a bid response, but will be required to register prior to being awarded a contract or purchase order. Registration must be renewed annually with documentation on file prior to each renewal of an award.

Some acquisitions will not require vendors to complete vendor registration for procurement. Below are exceptions to the vendor registration requirement:
Fair and Reasonable acquisitions – less than $5,000.
Fixed Rate acquisitions.
Membership acquisitions.
Professional Service acquisitions (i.e. medical or legal services).
Interagency or other Governmental Entity acquisitions.
Utility acquisitions.
Agency specific exemptions (as applicable by State of Oklahoma statutes).

Important: Exemption is not applicable to registration requirements for Oklahoma Secretary of State and Oklahoma Tax Commission. Please contact these agencies directly for specific requirements.

Vendors not required to complete procurement registration are required to complete the online registration process for FINANCIAL REGISTRATION to enroll in direct deposit payment.

VENDOR REGISTRATION OVERVIEW

Vendor registration is a multi-step process that can be accomplished online via the State of Oklahoma Vendor Registration Portal. The process is broken up into various modules which can be saved and returned to if you are unable to complete the registration process during your initial attempt.

In preparation for vendor registration you should have the following:

- **Tax Identification Number**
  - Business Employer Identification Number (EIN) or Individual Social Security Number (SSN). Number provided should match IRS filing information for entity to be awarded contract. Tax Identification Number may only be registered once.

- **A Current E-mail Address for User Login**
  - Recommended use email account within company that is accessible by multiple individuals within your organization. Email address may only be assigned to one registration account. User Login is the assigned account manager and will retain authority for future account updates.

- **Secretary of State Registration Number**
  - Contact Secretary of State for specific requirements or explanation of your exemption status.

- **Oklahoma Sales Tax Permit Number**
  - Contact Oklahoma Tax Commission for specific requirements or explanation of your exemption status.

- **Workers’ Compensation Insurance Certificate**
  - Or explanation of exemption status.

- **EFT Direct Deposit Banking Information**
  - And matching remittance address for payments.

- **UNSPSC Category Codes**
  - For products and services for which you wish to receive bid notifications.

- **Credit Card**
  - For payment of current $25 annual fee for each family group for which you register.
BEFORE REGISTRATION

Before attempting the online registration process, please ensure you have completed the following and have the information readily available.

1) Review the Central Purchasing Website
The Central Purchasing website is your link to all procurement information for the State of Oklahoma. The site provides valuable information to help aide you in understanding the requirements for doing business with state agencies.

Side columns provide various links to important state procurement information which should be reviewed before bid activity. Additionally, the page provides a link to the Vendor Registration Information and Portal.

2) Register with Oklahoma Secretary of State
All vendors should contact the Oklahoma Secretary of State offices to determine the requirements for registration. Once you have completed the necessary steps, you will need to provide the Secretary of State filing number and business name in Step I of the vendor registration process.

Important: To meet IRS requirements, please ensure name registered with Secretary of State matches your IRS filing records exactly. Differences in spelling and characters will result in rejected vendor registration.
3) Register with the Oklahoma Tax Commission

All vendors should contact the Oklahoma Tax Commission offices to determine the requirements for registration. Once you have completed the necessary steps, you will need to provide your company’s Oklahoma Tax Commission filing number and business name in Step II of the vendor registration process.

Important: Tax Commission filing requires annual renewal. New effective dates should be provided annually before expiration occurs. This information can be updated within your eSupplier account or by contacting the OMES Service Desk at 405-521-2444.

4) Complete Workers’ Compensation Certificate

Workers’ Compensation is addressed in Step II of the Vendor Registration Process. Vendor should complete the required fields and provide a copy of the Workers’ Compensation as applicable. Vendor may submit initial form by uploading the authorized PDF document to their online registration OR email form to cp_registration@omes.ok.gov. Form should be resubmitted annually upon expiration of policy coverage. A copy of the up-to-date certificate will be required to be on file and verified at time of award.

Please ensure Certificate Holder located on the bottom left corner is assigned to:

State of Oklahoma
Vendor Registration
5005 N. Lincoln Blvd., Ste. 100
Oklahoma City, OK 73105

5) Gather EFT Direct Deposit Banking Info

The State of Oklahoma has recently focused its efforts on improving the efficiency of its vendor payment processes. To ensure faster payments and an efficient use of state resources, the Office of Management and Enterprise Services has created a secure online method of collecting the information necessary to pay vendors via Electronic Funds Transfer (EFT). EFT enrollment requirements include providing the direct deposit bank account information via the online registration system and submitting the EFT enrollment form which is provided within the online registration system. Vendors currently in the state payment system must have a secure PIN prior to completing the registration. Please contact the state agency with whom you are conducting business to complete the needed documentation to verify the authorized individual for direct deposit registration.

This registration requirement is a result of state law (Title 62, Section 34.64) which requires that "Payments disbursed from the State Treasury shall be conveyed solely through an electronic payment mechanism." To comply with the law, EFT bank information should be entered within Step VII of the online vendor registration, matching the company or individual name and remittance address provided. Within Step VII is also a hyperlink to the PDF document EFT Bank Change New Bank Account Request Form. Once the registration has been completed and submitted for approval, the form should be completed using provided instructions and submitted via fax directly to the Oklahoma Office of State Treasurer for approval. This is the final step required for Vendor Registration approval.
STEPS FOR ONLINE REGISTRATION

Once you have all information available, visit the Online Vendor Registration Portal to complete the steps for registration. Click on the Vendor Registration link provided on the Central Purchasing Home Page or type the URL vendors.ok.gov in your web browser. Click the Vendor Registration Link provided.

Below is a screen shot of the Online Vendor Registration Portal.
First Time User
If you have never attempted vendor registration, please select the First Time User option.

Additional options on this page include:

- **Forgot Login**: Previous registrants only. Email will be sent to email address on file.
- **Reset Password**: Previous registrants only. Email will be sent to email address on file.
- **Email Changed**: Can be used to update email address for primary Account User ID. Must validate previous account user and registration information.
Once you have entered the Account User email address to be used for all account management and the business or individual Tax Identification Number, select Next.

**Bidder Registration vs Financial Registration**

Procurement = Select BID NOTIFICATION

Payment Only = Select FINANCIAL REGISTRATION

Complete fields required for Account Setup. For Vendor Type, select ‘BID NOTIFICATION’ to register for procurement activities. Once you have entered the additional fields required, select Next.
Complete all fields of Page 2 of Online Registration Account Setup and select Next.

Common errors encountered are invalid email and incorrect formatting of the username or password. Please read requirements carefully.

- Special characters (i.e., @, -, &) are not permitted in either the login or password.
- Duplicate characters in a row (i.e., keepcool2000) are not permitted in the password.
- Please ensure the USER login and password are documented so that you will remember what has been entered. You will need this information to login and access your registration account.
Once a USER account is created, select ‘Return to Online Vendor Registration.’

Enter the login and password created.
Retrieve login and password information using the two grey buttons on the main login screen. You will need the tax identification number of the registered vendor and the email used previously to create the USER LOGIN. Once you retrieve the login from the email address entered, it will be used as well to retrieve or reset the password. If password reset is chosen, the security questions originally created during the USER account setup function above will be required as well. Instructions for account password reset will be emailed to email associated with registration account. The email will include login instructions and a temporary password that will need to be entered upon initial login.

Once USER login and password have been identified, click link provided to return to Online Vendor Registration. Enter login and password in left column.
**BIDDER REGISTRATION**

<table>
<thead>
<tr>
<th>Step I: Business Registration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Complete</td>
</tr>
</tbody>
</table>

**Step II: Business Verification**

Complete all steps including Oklahoma Tax Commission filing information and upload completed PDF document for Workers' Compensation Certificate.

**Step III: Addresses**

Enter Principal Address for Contract Award. Section requires three addresses to allow Save and Submit: Principal, Remit and Bid Address. If only one address is applicable, select ‘Duplicate for all Addresses.’

**Step IV: Contacts and PeopleSoft eSupplier Login**

Section requires Principal Contact to allow Save and Submit. To add multiple emails for bid notification, please contact Vendor Registration via the OMES Service Desk at 405-521-2444 or toll-free at 866-521-2444.

Create a PeopleSoft login ID and password for eSupplier Module. Please allow 2-3 days after registration approval to attempt login.
Step V Applicant Certification
Purchasing Terms and Conditions Agreement required for Central Purchasing Procurement Qualification. Please select and agree.

Step VI W-9 or W-8 BEN
The substitute W-9 is a legal requirement for IRS payment purposes. As such, the person signing the W-9 must be an individual authorized to sign for the company and execute the IRS CERTIFICATIONS. Complete and electronically sign. Foreign vendors should complete the W-8. Please contact Vendor Registration via the OMES Service Desk at 405-521-2444 or toll-free at 866-521-2444 for additional assistance.

Step VII Banking Information
EFT bank information should be entered within Step VII of the online vendor registration, matching the company or individual name and remittance address provided. Within Step VII is also a hyperlink to the PDF document EFT Enrollment Form 2017. Once the registration has been completed and submitted for approval, the form should be completed using provided instructions and submitted via fax directly to the Oklahoma Office of State Treasurer for approval. Bank form approval is the final step required for Vendor Registration approval.

Step VIII UNSPSC Category Code
Register for specific products or services for which you wish to receive Bid Notifications and be eligible for contract. There is a registration fee of $25.00 for each family code a supplier chooses to register for. Any sub-category that falls under that family code is included within that fee (the commodity structure consists of four levels and the charge is applied to second level). The fee is due at the time of registration and during yearly renewal.

What are UNSPSC Category Codes?
The United Nations Standard Products and Services Code (UNSPSC) is a hierarchical convention that is used to classify all products and services. For additional assistance, visit the Central Purchasing UNSPSC Code website:

https://data.ok.gov/Finance-and-Administration/UNSPSC-Codes/uqsf-qkqb

Additional information is provided on the United Nations Standard Products and Services Code (UNSPSC) website:


Step IX Submission and EFT Bank Form
Step IX is used to Review, Confirm Accuracy and Save/Submit for approval. You must select the ‘Continue’ option and complete these steps to submit application and changes for approval anytime changes are made.
You will receive confirmation emails with Approved Pending Banking and Approved Status verification. A reminder is sent to vendors not in Approved Status to submit the EFT ENROLLMENT FORM to complete the financial registration requirements.

**VENDOR RESPONSIBILITIES**

- Vendor is required to renew registration annually.
- Vendor should contact agency buyer to notify state of any changes to Tax Identification Number, name, address or additional business information.
- Vendor should provide up-to-date W-9, Secretary of State, Oklahoma Tax Commission and Workers’ Compensation Certification annually.

**ESUPPLIER ONLINE ACCOUNT**

The eSupplier login information assigned in Step IV will allow vendors doing business with the State of Oklahoma to log into the state’s procurement application –Electronic Commerce Portal– and collaborate on procure-to-pay transactions. Vendors will have the ability to bid on solicitations they’ve been invited to, view transactions such as purchase orders, receipts and payments and maintain some vendor account information.

Upon final Vendor Registration Approval an eSupplier User Manual is sent via email to the vendor. This manual is intended to describe the navigation, pages and features available to vendors when logging into the Electronic Commerce Portal. This manual should be used by an individual within the vendor organization as a guide to view, enter and change transactional data that is available to them.

**FAQs**

*Does my company have to be registered in order to bid?*

No, it is not necessary for a vendor to be registered with the Central Purchasing division of the Office of Management and Enterprise Services (OMES) in order to bid. However, vendor registration is required of any vendor that desires to automatically receive bid notifications via email or fax. All bidders who are not registered on the State of Oklahoma vendor registration list must complete the W-9 (non-US persons or entities are required to submit form W-8BEN or BENE) and submit with their bid response.) Registration and completion of required vendor documentation is required prior to award. Failure to do so may delay contract award.

*Does my company have to be registered to receive an award?*

Yes. If the contract value is greater than $5,000 and falls under Title 74, then the vendor is required to be registered. There are limited circumstances where an exemption may be granted such as Fair and Reasonable acquisitions – less than $5,000, Fixed Rate acquisitions, Professional Service acquisitions, and Interagency or other Governmental Entity acquisitions.
Who must sign the required substitute W-9 form?

The W-9 is a legal requirement for IRS payment purposes. As such, the person signing the W-9 must be an individual authorized to sign for the company and execute the IRS CERTIFICATION: Under penalties of perjury, I certify.... (1) The number shown on this form is my correct taxpayer identification number.... (2) I am not subject to backup withholding... etc.

What are the tax identification numbers requested for registration?

The Taxpayer Identification Number (TIN) is your business entity Employer Identification Number (EIN) or individual Social Security Number (SSN). Information provided must match IRS filing information for the individual or business awarded contract.

IMPORTANT: LLC businesses filed as Disregarded Entities must provide the parent information as registered with the US Internal Revenue Service per IRS form W-9 instructions and IRS publication 3402. Please contact your corporate tax offices or tax filing entity to verify your Disregarded Entity tax filing structure prior to registration.

What do I put under Bidder’s Comments?

Bidder’s comments can be used for the additional information required for companies who have been in business for less than two years and/or to tell us anything about your company that you would like us to know.

Is there a registration fee?

There is a registration fee of $25.00 for each family code a supplier chooses to register for.

Any sub-category that falls under that family code is included within that fee (the commodity structure consists of four levels and the charge is applied to second level). The fee is due at the time of registration and during yearly renewal.

What do NIGP and UNSPSC stand for?

NIGP: National Institute of Governmental Purchasing – www.nigp.org


What is the UNSPSC code structure?

Vendor registration code structure is tiered and organized by the following: Segment > Family > Class > Commodity.

Vendors pay the $25 fee per family code. The fee includes all class and commodity codes that fall under that family code.
How is the code fee assessed?

10000000 Live plant and animal material and accessories and supplies (segment-no fee)

10100000 Live Animals (family-$25.00 Fee)

10101600 Birds and Fowls (class-included no fee)

10101601 Live Chickens (commodity-included no fee)

10101500 Livestock (class-included no fee)

10101512 Rabbits (commodity-included no fee)

Included in the family code fee would be all subcategories selected in the class or commodity segments. Vendors will begin their selection at the family level. Vendors are required to select at least one of the class and commodity level codes for each family code selected.

How can I find out more information about the UNSPSC coding structure?

Please visit their website at http://www.unspsc.org.

I am having difficulty finding applicable codes for my business.

It is recommended for vendors to search UNSPSC Website Code Posting for applicable commodity codes prior to registration. This will provide the current code listing that is in our system. When registering online, vendors have the possibility to select and deselect family, class and commodity before finalizing their registration.

How do I find out if I am required to have an Oklahoma Sales Tax Permit, be registered with the Secretary of State or have a Workers’ Compensation Certificate?

Please contact the respective agency to find out the requirements. Central Purchasing and OMES Vendor Management are not authorized to offer legal advice to vendors with regards to the requirements of the Oklahoma Tax Commission Sales Tax Permit, with the Secretary of State Registration or Workers’ Compensation Certificate. State law requires that buyers/contracting officers verify registration and this information prior to contract award.

Oklahoma Secretary of State
Business Filings
https://www.sos.ok.gov/corp/filing.aspx
Colcord Center
421 NW 13th St, Suite 210/220
Oklahoma City, OK 73103Phone: 405-522-2520
Office of Management and Enterprise Services

Oklahoma Tax Commission
Permits
https://www.ok.gov/tax/Online_Services/Online_Business_Registration.html
2501 North Lincoln Boulevard
Oklahoma City, OK 73194
Connors Building, Capitol Complex (Northwest Corner Building of Complex)
Phone: 405-521-3160

Workers’ Compensation Commission
Insurance Services
1915 North Stiles Avenue Suite 231
Oklahoma City, Oklahoma 73105
Phone: 405-522-8680
Email: InsuranceDepartment@wcc.ok.gov
Exemption Request Information:
https://ok.gov/wcc/documents/1.10.17%20Certificate%20of%20Noncoverage%20Instructions.pdf

To whom do I assign my Workers’ Compensation Certificate?

Please assign certificate to:

State of Oklahoma
Vendor Registration
5005 N. Lincoln Blvd., Ste. 100
Oklahoma City, OK 73105

What is the PeopleSoft login and why do I have to complete it?

The PeopleSoft login allows a vendor access to the same system as the state uses to issues purchase orders and payments. Using their PeopleSoft login, vendors may review purchase orders and payments that have been issued to their assigned PeopleSoft Vendor ID.

I established my user name and password for the PeopleSoft login, but it still does not work. What do I do?

Please allow 2-3 business days after registration completion and email notification of Approved Status to access the PeopleSoft log in. If the problem persists, please contact the OMES Help Desk at 405-521-2444 or toll-free at 866-521-2444.

How do I know if my registration is complete?

You will receive a confirmation after your registration is validated and approved by OMES Vendor Management. Final confirmation will show APPROVED. Please note additional steps are required for APPROVED PENDING BANKING.
I forgot my login/password.

If you are an existing user and you DO NOT remember your login/password information, select the 'Forgot Login' or 'Forgot Password' link and follow the instructions on the upcoming screens.

While registering online, can I save information and come back later?

Step I of the vendor registration process must be saved and submitted before progress is saved. Your registration will not be effective until all nine steps have been completed, submitted and approved by Vendor Management.

I am getting an error message while selecting commodities.

Commodities are structured similar to a parent-child relationship: Family > Class > Commodity. For each family code there must be at least one class selected; and, for each class at least one commodity. Selection of several families can increase the possibility of missing a commodity during the selection process, and the system is designed to trigger an alert because of the omitted information.

The login process to the account is different from what I remember when I registered for the first time.

When registering previously, an email address was provided for the primary account user. If you are the individual who completed registration previously, choose ‘Forgot Password’ and follow the steps provided. There can only be one email account or account user associated with a Tax Identification Number. An email will be sent with password reset information.

When I attempt to register I get an error saying my Tax Identification Number has already been used.

Registration was attempted or even completed for this Tax Identification Number by a different user name and email address. Please contact the OMES Help Desk at 405-521-2444 or toll-free at 866-521-2444 for assistance.

CONTACT INFORMATION

Vendor Management

Victoria M. Baker
Director Vendor Management
Office of Management and Enterprise Services
Email: Victoria.Baker@omes.ok.gov
Phone: 405-522-3093
Fax: 405-522-3663
Vendor Registration Assistance
OMES Service Desk
Phone: 405-521-2444 or toll free 866-521-2444
Email: servicedesk@omes.ok.gov

Online Vendor Registration Technical Assistance
OK.gov Help Desk
Phone: 405-524-3468
Email: helpdesk2@egov.com

Vendor EFT Bank Update or Payment Inquiries
For security purposes, please do not email bank information or provide to state agency personnel.

EFT Bank Forms
All EFT bank forms should be faxed directly to Oklahoma Office of State Treasurer.
Fax: 405-521-4994

EFT Inquiries
Questions or changes regarding EFT bank information.
Email: Vendor.EFT@omes.ok.gov

For questions regarding purchase orders, payments and shipments, please contact the state agency directly.

State of Oklahoma, Central Purchasing
U.S. Postal Delivery:
Central Purchasing
P.O. Box 528803
Oklahoma City, OK 73152-8803
Personal or Common Carrier Delivery:
Central Purchasing
5005 N. Lincoln Blvd., Ste. 300
Oklahoma City, OK 73105
Phone: 405-522-0955
Fax: 405-521-4475

For questions regarding solicitations or bidding, please contact the state buyer listed on the Solicitation Event.

Oklahoma Secretary of State
https://www.sos.ok.gov/corp/filing.aspx

Oklahoma Tax Commission
http://www.oktax.state.ok.us/