

Supplier Guide: Registration and Profile Management

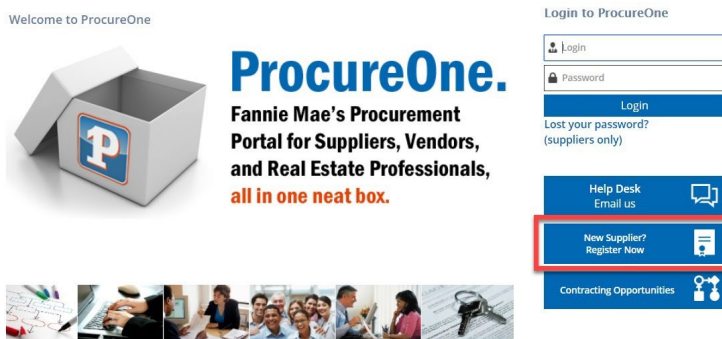
This Systems guide is intended to help new and existing suppliers register and manage their profile in ProcureOne.

Recommended browsers that are compatible with ProcureOne are as follows: ■

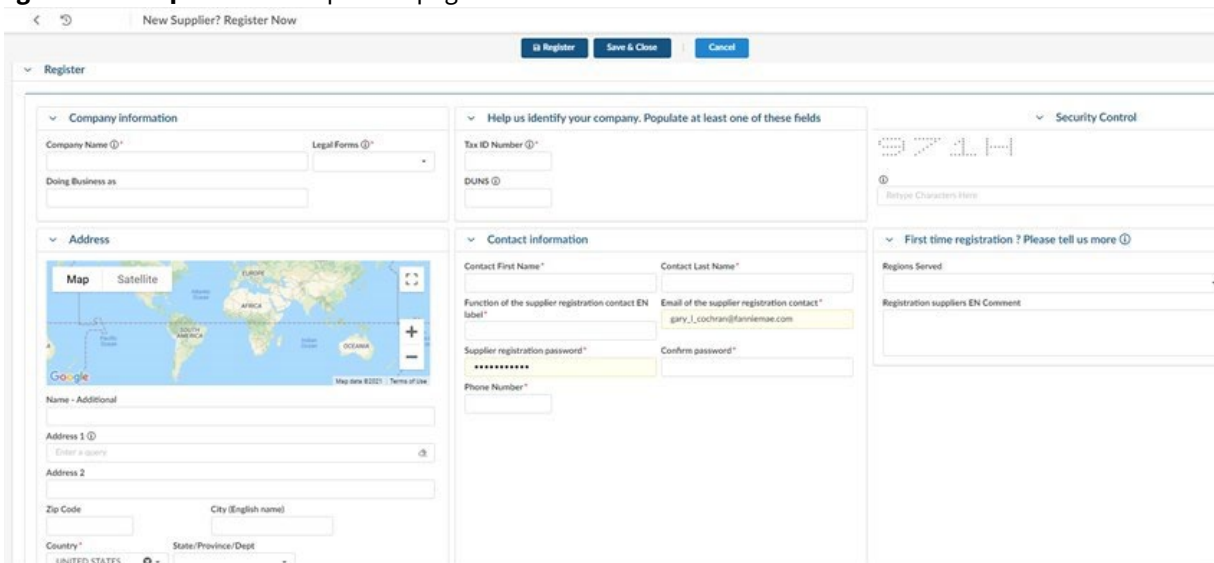
Microsoft Edge, Google Chrome, & Mozilla Firefox

How to Register as a Supplier in ProcureOne:

1. Navigate your browser to <http://procureone.fanniemae.com> and once on the site click **New Supplier? Register Now**.



2. Once on the **Register** page, complete all required fields. Required fields have a red vertical bar. Once completed click **Registration request** at the top of the page.



Note: Google Maps will verify the address that is used at the registration process. You will see a confirmation on the screen to let you know that the information has been saved.

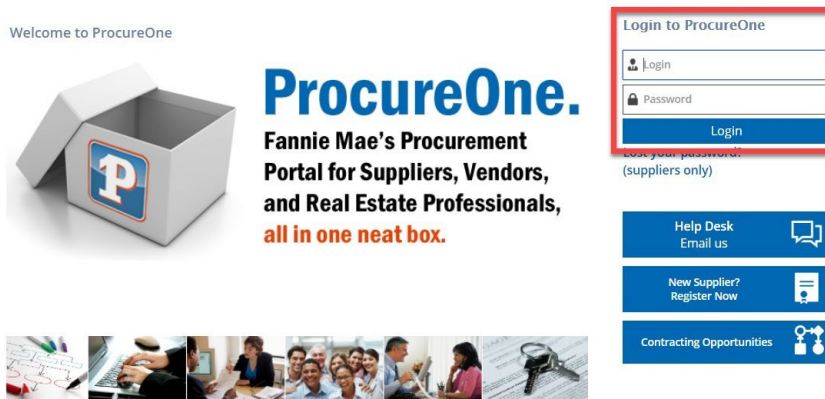


Email Confirmation and Instructions:

3. You will receive an email from ProcureOne@fanniemae.com. Follow the instructions in the email to complete your login and registration set up process. Do not respond to the email as the email address does not receive replies.

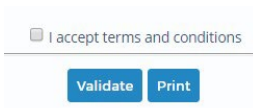
Log in to ProcureOne:

4. Navigate your browser to <http://procureone.fanniemae.com>, once on the site enter your email address and password that you entered during the registration. The ProcureOne login page can also be reached by going to Fanniemae.com and selecting *Suppliers* from the bottom of the page.



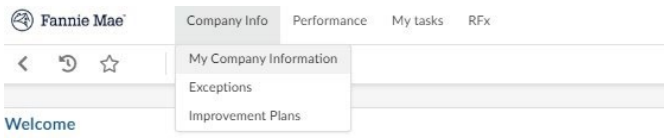
Accepting Terms and Conditions:

5. Review the terms and conditions and if applicable check the box next to **I accept terms and conditions** and click **Validate**.



Updating your supplier information:

6. Once you are logged into ProcureOne, you will be in the landing page. Update your supplier profile by clicking on **Company Info** and then **My Company Information**.



7. On the **Main Info** tab, verify or update your information and click **Save**.
8. Answer the questions under the **Additional Information** section, making sure to address all required fields as noted by the red vertical bar.



- a. How did you hear about us?
- b. Opt-In: Thank you for your registration. From time to time, contacted information for suppliers that have registered in our system. If you do not wish to be contacted by third parties who may be interested in obtaining your services, please choose **No** here.
- c. Question 1: Is your company aware of a pre-existing relationship (e.g. spouse, family member, extended family member, partner, friend, business colleague, etc.) that exists between your employee or board member and a Fannie Mae employee or board member? Comment: This space is provided for you to comment on your answer to this question.
- d. Question 2: Is your company aware of a pre-existing professional relationship that exists between your employee or board member and a Fannie Mae employee or board member that arose out of a prior professional engagement?

Additional Info:

- 9. On the Additional Info tab, verify or update the following information and click **Save**.
 - a. Corporate Settings section:
 - i. Years of incorporation
 - ii. DUNS# • Federal Tax ID (Tax ID Number/TIN)
 - iii. Primary Category (up to 10)
 - b. Payment address Section
 - c. Order address

Banking Information:

- 10. Click the **Banking Info** tab. Go to the Supplier email address for ACH payment confirmation field and enter an email address to receive your payment information.

- 11. Click on the **Add banking info.** button and complete all required fields (those with a red asterisk), click **Save and close**.



Banking Information ⌵ ⌵ ⌵

Save Save & close

Banking Information

Financial Institution

Clearance Agency

BIC Code

Default

> RIB

> IBAN

ABA

Account Number Routing Number

Notes:

- Make sure to enter a valid ABA/routing number. If you don't, an error message will appear and you will be unable to save the bank information.

• The Banking Info tab will only appear for corporate suppliers.

Documents & Certs.:

- On the **Documents & Certs.** tab upload any required attachments, certifications, diversity credentials or other attachments by clicking on the button for each attachment type.
- A list of required documents by supplier type can be found on www.fanniemae.com/supplier and is also listed below at the end of this document.

Contacts

Documents & Certs.

Communication

Qualifications

Banking Information

Keywords Status State to date Archived Documents Search Reset

Required Attachments

Add document required attachments

0 Result(s)

Certifications

Add document certifications

0 Result(s)

- When uploading attachments, be sure to select the proper **Document type** and **Document validity** date range. This will enable the system to send you reminders to update before the documents expire.
- When uploading required documents, indicate the document type:
 - Completed W-9

Diverse Supplier:

- If you are a Diverse Supplier, please attach your Diversity Certificate(s) in the **Diversity Credentials** section. This will flag your diversity type in the system.
- To self-certify with Fannie Mae, please go to www.fanniemae.com/suppliers and find the self-certification document in the diversity section. Complete the required fields and upload the document by clicking **Add document diversity credentials**.
- Scroll down to the Diversity Credentials section and click on **Add diversity credentials**.



▼ Diversity Credentials

Fannie Mae recognizes the following diverse categories consistent with HERA Regulations: minority, women, individuals with disabilities AND minority-, women- and disabled-owned businesses. You may self certify for the HERA diversity classifications by downloading this [document](#).

Fannie Mae also recognizes other diverse categories including Lesbian, Gay, Bisexual, Transgender Owned Business (LGBT); Historically Black Colleges, Universities & Minority Institutions; Small Business; Veteran; 8(a) Business and HUBZone. If your company meets the eligibility criteria for one or more of the non-HERA listed classifications, you are required to attach a valid third party authorized certification for each classification type you claim. Refer to our [website](#) for eligibility criteria.

To attach your supporting documentation use the "Add document diversity credentials" below.

Add document diversity credentials

19. A new page will display called **Edit document: Diversity Credentials**. This is where you will be uploading your initial or updated Diversity Certificate(s). **NOTE:** You may have required fields that you have to populate before being able to add any documents. If so, accurately populate these fields and click **Save**. Then go back to Legal Documents -> Diversity Credentials and click on **Add Diversity Credentials**.

Important

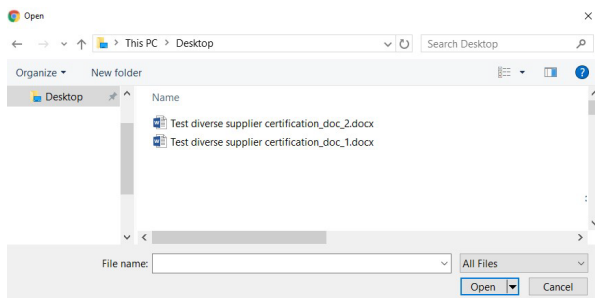
It is important to select the correct **Document type** and **Document validity** date range when uploading attachments as this will flag your diversity type in the system.

Important

If more than one diverse ownership classification applies to your company, you must repeat the steps to upload your documentation as many times as needed. For example, if you are women-owned and a small business, you must add two diversity credential documents to your ProcureOne for women-owned and one for small

business.

20. Enter the certificate name in the **Document name** field. If completing a Fannie Mae Self-Certification form, name the form "*Fannie Mae Self-Cert*". For other certification documents, follow these naming convention(s):
- "WBENC Cert" (Women-owned certified by WBENC)
 - "NMSDC Cert" (Minority-owned certified by NMSDC)
 - "Disability:IN Cert" (Disability-owned certified by Disability:IN)
 - "NGLCC Cert" (LGBT-owned certified by NGLCC)
 - "SBA Cert" (Small Business Administration)
 - "Other 3rd Party Cert" (Any other third-party certification)



21. Upload a copy of the certification on the **Document** field. You can *click and drag* the document, or you can click in the field and a new screen will display. Select your document and click **Open**. Your document will now display under the **Document** field.

22. Enter the **Document validity from the and to the** dates field:



- a. For Fannie Mae Self Certification documents, the **document validity from the** date should be the signature date and **the to** date should be 2 years later, as self-certifications are valid for 2 years.
 - b. For other certification documents, use the expiration date as found on the certificate.
23. Select from the drop down the **Document Types** – select the correct classification to correspond with the diversity credentials. For example, if you have a self-certification form that says you are women owned, select the document type as “*Diversity Credentials/HERA-Women*”.

Different Document Type: (Select the proper type)

- a. Diversity Credentials/ HERA-African American
 - c. Diversity Credentials/ HERA- Asian American
 - d. Diversity Credentials/ HERA-Native American
 - e. Diversity Credentials/ HERA- Hispanic American
 - f. Diversity Credentials/ HERA- Women
 - g. Diversity Credentials/ HERA- Disable
 - h. Diversity Credentials/ LGBT
 - i. Diversity Credentials/ HBCU
 - j. Diversity Credentials/ HUBZone
 - k. Diversity Credentials/ Veteran
 - l. Diversity Credentials/ Small Business
24. Once this is all completed, click **Save & close**.

Make sure to repeat steps five through ten for each diverse ownership classification that applies to your company. See **Important Notes** on step five.