

Tips for Completing Vendor Setup Requests

New or Change	<ul style="list-style-type: none"> • Use Web Query to check
Vendor Legal Name	<ul style="list-style-type: none"> • Ask Accounts Receivable Manager or Controller • Name used for tax filing purposes • Clarify whether “incorporated” is INC or PC
Trade Name (DBA)	<ul style="list-style-type: none"> • Ask the question, “Is this the name you use for tax filing purposes?” • This will be an unregistered name and is commonly used with franchises
Vendor Type	<ul style="list-style-type: none"> • Ask the question, “What type of goods and/or services do you provide?” • Ask the question, “Will this be a one-time payment?” • Determine who is a non-employee vs. employee
Type of Organization	<ul style="list-style-type: none"> • Knowing whether a vendor is an INC, PC, LLP, LLC, 501(c) 3 will help determine type.
Addresses	<ul style="list-style-type: none"> • In Oracle terminology, an address is called a “site”. The site naming convention is the city plus a chronological number corresponding to when the address was added to the vendor record.
Notes/Special Instructions	<ul style="list-style-type: none"> • Note previous information that is being changed or added
Requester Information	<ul style="list-style-type: none"> • Contact info is essential • Must be different from Authorizer name
Authorized By	<ul style="list-style-type: none"> • <i>Print</i> name and sign • E-mail will be accepted as an electronic signature • Must be different from Requester name
Other	<ul style="list-style-type: none"> • Type forms for legibility • E-mail is preferred • Get rid of old forms!

Tips To Help Ensure Timely Processing of VSR’s

- In order to capture accurate data for federal and state reporting, please fill out ALL the information required on the form. Your name, department and phone number are very important should we have a question (and we often do!)
- Be sure to include the Taxpayer Identification Number (TIN) to help identify whether a vendor exists in the database. If an original invoice is available, you may find the TIN on the invoice. If you are not sure of the TIN, please contact Vendor Compliance at 436-4345.
- If you do not obtain your vendor number within 24-72 hours, please e-mail or phone Vendor Compliance at 436-4345.
- Be sure to send all Vendor Setup Request forms to the Vendor Compliance Unit.
- Fax, e-mail or mail only one copy of the Vendor Setup Request form to the Vendor Compliance Unit.