

VENDOR SET-UP PROCEDURES, VENDOR SET-UP FORM & BLANK W-9

All departments requesting set-up of vendors to be paid, must provide an up-to-date W-9 and the Vendor Set-Up Form.

The W-9 must contain the individual and/or company name and all appropriate information must be filled out, including:

- the individual name and/or business name (if applicable)
- the physical address and remit to address (if different)
- federal tax classification
 - Individual/Sole Proprietor
 - C-Corporation
 - S-Corporation
 - Partnership
 - Trust/Estate
 - LLC (C Corporation, S Corporation or P Partnership)
- FID or SSN
- Signed and dated

The Vendor Set-Up Form must contain:

- Reason for new vendor request
- Why they are being paid (reimbursement, goods, services; etc.) for tax purposes
- Vendor's email address
- Name and Department of Person making request
- Date

Once the vendor has been set-up, you will be notified by the Auditor's Office that it has been completed. If you do not hear from the Auditor's Office or you just want to see if the vendor already exists, prior to submitting a W-9, you can go in and search the Vendor in MUNIS by going to:

- Vendor Processing
 - Vendor Inquiry

- Alpha – enter the individual or company name to see if it has been created:

- Example: Looking for an individual, John Doe:

- **DOE, JOHN**

or

- **DOE***

- Example: Looking for a company, W.B. Mason Co. Inc.:

- **MASON W.B***

or

- **MASON***

Or

- **W.B***

NOTE: You may find more than one number for the same vendor, please make sure you choose the correct one to use (i.e. name, address, tax I.D). Also, if you have a Contract associated with this vendor, please scan it and attach it in the vendor profile, once you have the vendor number.

School Department vendors will be created and updated (if necessary) by the School Department.



VENDOR SET-UP FORM

DATE: _____

VENDOR NAME: _____

VENDOR'S EMAIL ADDRESS: _____

EXPLANATION/REASON:

Person Submitting Request: _____

Department: _____

Date: _____