

# Vendor Set-Up Procedures

## Vendor Set-Up Form and IRS Form W-9

All departments requesting the creation of a new vendor for payment must submit a **completed Vendor Set-Up Form** and a **current IRS Form W-9**.

### Required W-9 Information

The W-9 must be fully completed and include the following:

- Individual name and/or legal business name (as applicable)
- Physical address
- Remit-to address (if different from physical address)
- Federal tax classification (check one):
  - Individual / Sole Proprietor
  - C-Corporation
  - S-Corporation
  - Partnership
  - Trust / Estate
  - LLC (specify: C-Corporation, S-Corporation, or Partnership)
- Federal Identification Number (FID) or Social Security Number (SSN)
- Signature and date

Incomplete or unsigned W-9 forms will not be accepted.

### Vendor Set-Up Form Requirements

The Vendor Set-Up Form must include:

- Reason for the new vendor request
- Purpose of payment (e.g., reimbursement, goods, services) for tax reporting purposes
- Vendor's email address
- Name and department of the employee submitting the request
- Date of submission

### Vendor Creation and Notification

Once the vendor has been created, the requesting department will be notified by the **Auditor's Office**.

If you do not receive confirmation, or if you wish to verify whether a vendor already exists **prior to submitting a W-9**, you may search in MUNIS using the following steps:

#### MUNIS Navigation Path

- Vendor Processing
  - Vendor Inquiry
  - Alpha Search

### **Search Examples**

- Individual vendor (John Doe):
  - DOE, JOHN
  - DOE\*
- Company vendor (W.B. Mason Co., Inc.):
  - MASON W.B\*
  - MASON\*
  - W.B\*

### **Important Notes**

- Multiple vendor records may exist for the same vendor. Always verify and select the correct record based on **name, address, and tax identification number**.
- If a contract is associated with the vendor, it must be scanned and attached to the vendor profile in MUNIS once the vendor number is assigned.

### **School Department Vendors**

Vendor records for the **School Department** will be created and maintained by the School Department.