PROCEDURE

Effective Date: May 21, 2007
Revised: April 9, 2013
Approved By: Teresa Hart, Financial Services Director

See Also:
- FRM-U5320.12A Vendor Record Creation and Maintenance Request Form
- Form W-9 Request for Taxpayer Identification Number and Certification Form
- TSK-U5320.12A Creating a Vendor Record
- PRO-U5320.12B Requesting Accounting Services to Update a Current Vendor Record
- PRO-U5320.12C Correcting Duplicate Vendor Records

PRO-U5320.12A REQUESTING ACCOUNTING SERVICES TO CREATE A NEW VENDOR RECORD

Action by: University Department

Action:
1. Provides Form W-9 to vendor to complete.
2. Completes Vendor Record Creation and Maintenance Request e-form.
3. Scans and attaches to the e-form a:
   a. Completed Form W-9, and
   b. Written documentation of vendor service (i.e. invoice, contract).
4. Routes e-form to Accounting Services and goes to step 8.

Action by: Accounting Services
5. Receives e-form.
6. Follows the Creating a Vendor Record task (TSK-U5320.12A).
7. Locks e-form which notifies the University Department that the vendor account has been updated.

Action by: E-Form Originator
8. Receives electronic notice of completed request from Accounting Services.