

PROCEDURE

Effective Date: May 21, 2007

Revised: April 9, 2013

Approved By: Teresa Hart, Financial Services Director

Authority: [POL-U5320.12](#)Creating and Maintaining Vendor
Account Records

Cancels:

See Also: [FRM-U5341.05A](#) Vendor Record Creation and Maintenance Request e-Form
[TSK-U5320.12B](#) Updating Vendor Record Accounts in Financial System
[PRO-U5320.12A](#) Requesting Accounting Services to Create a New Vendor Record
[PRO-U5320.12D](#) Correcting Duplicate Vendor Records

PRO-U5320.12B

REQUESTING ACCOUNTING SERVICES TO UPDATE A CURRENT VENDOR RECORD

Action by:University Department OR
Accounting ServicesAction:

1. **Receives** from vendor a notice for change to existing vendor record.
 - a. If it is a University Department receiving the notice from the vendor, **go to** step 2.
 - b. If it is Accounting Services receiving the notice from the vendor, **go to** step 6.
2. **Completes** *Vendor Record Creation and Maintenance Request* e-form upon receipt of an invoice, purchase order, or other correspondence indicating new account information.
3. **Attaches** to e-form a scanned copy of written documentation from vendor requesting change.
 - a. If University department has vendor maintenance permissions, **completes** step 3 and then **goes to** step 6.
4. **Submits** e-form to Accounting Services.
5. **Receives** e-form.
6. **Follows** the *Updating New Vendor Record Accounts in the Financial System* task (TSK-U5320.12B).

Accounting Services

Exception: Accounting Services **skips** step #6 if e-form is submitted by a University Department with approved maintenance permissions.