The Vendor Center

User’s Guide

University Controller’s Office
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The Vendor Center replaces the Add/Update Vendors module within Financials and includes several new enhancements.

- The layout of the **Vendor Center** has the same look and feel as the Travel Center.

- Ability to view pending vendor requests within the new **Recent Requests** section has been added. This section displays all pending vendor requests made within the user's 6-digit department ID.

- Required Documentation informational links have been added to provide the Vendor ACH Enrollment and W-9 Requirements for US Citizens and Entities and the Foreign National Required Documentation for Non-US Citizens and Entities.

- Ability to upload the required documentation directly into the vendor request has been added. Note: The *original signed W-8BEN* (required for Non-US Citizens) will still need to be sent to the HR/International Employment & Taxation Office (IET).

- Approval workflow has been added for Non-US Citizen/Entity vendor requests. Workflow approval steps have been added to certify Non-Resident Aliens (NRAs). The HR/International Employment & Taxation Office will certify Non-US Citizens, and the Controller’s Office/Tax will certify Non-US Entities before requests are approved by AP Vendor Processing.
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## Update
- Update an Existing Vendor
The Vendor Center is the hub of all vendor activities. Additions, updates and inquiries all take place within the Vendor Center. The Vendor Center is for campus and departmental users with security access (Voucher Entry, Requisition Entry, or Travel Entry) to enter requests to add and update vendors to the system and to update existing vendors.

To access the Vendor Center, login to MyPack portal.

- Go to Faculty & Staff → Financial Systems → Vendor Center

### Vendor Center Features

**New Request**
- What would you like to do?
  - Update/Search Vendors
  - Add Vendor

**Recent Requests**
<table>
<thead>
<tr>
<th>Request ID</th>
<th>Type</th>
<th>Vendor Name</th>
<th>Status</th>
<th>Vendor ID</th>
<th>Date Submitted</th>
<th>Requester</th>
</tr>
</thead>
<tbody>
<tr>
<td>49819</td>
<td>New Vendor</td>
<td>John Smith</td>
<td>Awaiting ACH From Vendor</td>
<td></td>
<td>11/04/2015</td>
<td>Verna L. Little</td>
</tr>
<tr>
<td>49820</td>
<td>Update Vendor</td>
<td>Cintas Corporation</td>
<td>Awaiting Documentation</td>
<td>00000008137</td>
<td>11/04/2015</td>
<td>Verna L. Little</td>
</tr>
<tr>
<td>49821</td>
<td>New Vendor</td>
<td>Mary Martin</td>
<td>Awaiting Documentation</td>
<td></td>
<td>11/04/2015</td>
<td>Verna L. Little</td>
</tr>
<tr>
<td>49822</td>
<td>New Vendor</td>
<td>John Smith</td>
<td>Awaiting ACH From Vendor</td>
<td></td>
<td>11/05/2015</td>
<td>Verna L. Little</td>
</tr>
<tr>
<td>49824</td>
<td>New Vendor</td>
<td>Rosemary Bussey</td>
<td>Awaiting Documentation</td>
<td></td>
<td>11/05/2015</td>
<td>Verna L. Little</td>
</tr>
<tr>
<td>49825</td>
<td>New Vendor</td>
<td>Mary Martin</td>
<td>Awaiting Documentation</td>
<td></td>
<td>11/05/2015</td>
<td>Verna L. Little</td>
</tr>
<tr>
<td>49827</td>
<td>New Vendor</td>
<td>Morton Company</td>
<td>Awaiting NRA Certification</td>
<td></td>
<td>11/06/2015</td>
<td>Verna L. Little</td>
</tr>
<tr>
<td>49828</td>
<td>New Vendor</td>
<td>Foreign Co</td>
<td>Awaiting NRA Certification</td>
<td></td>
<td>11/06/2015</td>
<td>Verna L. Little</td>
</tr>
<tr>
<td>49830</td>
<td>New Vendor</td>
<td>John Smith</td>
<td>Awaiting Documentation</td>
<td></td>
<td>11/11/2015</td>
<td>Verna L. Little</td>
</tr>
<tr>
<td>49831</td>
<td>New Vendor</td>
<td>Enrrique Iglesias</td>
<td>Awaiting Documentation</td>
<td></td>
<td>11/11/2015</td>
<td>Verna L. Little</td>
</tr>
</tbody>
</table>

For help or additional information please email: vendor_id@ncsu.edu

- **Vendor Guidelines**: Provides a link to the Vendor Center User’s Guide.
- **Update/Search Vendors**: Make changes to an existing vendor or search all vendors
- **Add Vendor**: Enter a new vendor request
- **Recent Requests**: Provides a listing of requests that are currently pending within your six digit Department ID or additional departments depending on your security set up.
Adding A New Supplier Vendor

1. Select Add Vendor

2. Select Supplier


- **Vendor ACH Enrollment Form**

  Link provides a printable ACH Form.

  **A completed ACH form is required for US Citizens/Entities to setup a new vendor. Current exceptions still exist. The ACH form should be returned to:**

  NC State University
  Vendor Processing
  Campus Box 7204
  Raleigh, NC 27695-7204

  If the vendor returns the form to the department, submit it to Vendor Processing via ACH Upload button or fax it to 919-515-1847.

- **W-9 Requirements**
Adding A New Supplier Vendor - continued

- **Foreign National Required Documentation**

Clicking on link will take the user to the W-8BEN Series Requirements for Non-US Citizens/Entities and Visa/Passport requirements for Non-US Citizens. From this page there are links to printable W-8BEN Forms. Also, clicking on the links to the various Visa Requirements will take you to International Employment & Taxation’s International Vendor Resource page.

**W-8 (Series) Requirements**

A signed W-8 Series form is required to process payment to foreign entities. Depending on the type of foreign organization, different W-8BEN forms may apply. For the vast majority of University business, a W-8BEN –E will be required.

Below are the W-8 Series for entities.

### Individuals


### Entities

- W-8BEN-E: Used primarily by foreign entities (Partnership, corporation, company or association).
- W-8ECI: Used primarily by the payee or beneficial owner that all the income is listed on the form is effectively connected with a trade or business in the USA and the owner has an EIN, ITIN, or SSN.
- W-8IMY: The recipient of the income is a withholding foreign partnership or foreign trust that has provided a valid WIMY with a WP-EIN or a WP-EIN.
- W-8EXP: The recipient of the payment is a tax-exempt organization (foreign governments, foreign tax exempt organization, foreign private foundation, govt. of a US possession, or foreign central bank).

**Visa/Passport Requirements**

**Copy of Visa/Passport Required for:**

- Non-US Citizens (Foreign Nationals-NRA)

**F-1 Visa Requirements:**

- Copy of passport photo page
- Copy of visa
- Copy of entry stamp in passport
- Copy of I-94 (if available-electronic system now)
- Copy of I-20 (3 page document)
- Signed W-8BEN
- Confirmation from sponsoring institution’s Office of International Services indicating they are aware of visitor’s activity and NCSU
Adding A New Supplier Vendor - continued

- Foreign National Required Documentation - Continued

J-1 Visa Requirements:
- Copy of passport photo page
- Copy of visa
- Copy of entry stamp in passport
- Copy of I-94 (if available-electronic system now)
- Copy of DS-2019
- Signed W-8BEN
- Confirmation from sponsoring institution’s Office of International Services indicating they are aware of visitor’s activity and NCSU

B-1 Visa Requirements:
- Copy of passport photo page
- Copy of visa
- Copy of entry stamp in passport
- Copy of I-94 (if available-electronic system now)
- Signed W-8BEN

H-1B Visa Requirements:
- Copy of passport photo page
- Copy of entry stamp in passport
- Copy of I-797 approval notice with I-94 (if available-electronic system now)
- Signed W-9

TN Visa Requirements:
- Copy of passport photo page
- Copy of entry stamp in passport
- Copy of I-797 approval notice with I-94 (Applies for visitors who changed status in the U.S.)
- Signed W-9

Payments outside the US:
- If payment is for services outside the U.S. then a signed W-8BEN is required

Passport Required for Nationals of Visa Waiver Program/ESTA participating countries.

Visa Waiver Program/ESTA:
- Copy of passport page
- Copy of entry stamp in passport
- Copy of I-94 (if available-electronic system now)
- Signed W-8BEN
Adding A New Supplier Vendor - continued

4. Within the Vendor Name field, enter the vendor’s name as it appears on the W-9 form or W-8BEN series form. Do not enter any punctuation in the Vendor Name field.

5. Select Add. The system will return existing vendor records closely matching the entered text.

6. Review the existing records for a possible match. Select View Addresses to review similar addresses. If the new vendor’s address on the W-9 or W-8BEN form matches an existing vendor’s address, DO NOT add the vendor.

7. Follow the Update a Vendor steps on Page 14.

8. Select Add, if the new vendor’s address does NOT match an existing vendor’s address.
**Adding A New Supplier Vendor - continued**

9. Complete all required fields within Vendor Center – Add Vendor. **Note**: Fields marked with an asterisk (*) are required.

<table>
<thead>
<tr>
<th>Vendor Details</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Name 1</strong>: This field will be pre-populated.</td>
<td></td>
</tr>
<tr>
<td><strong>Name 2</strong>: Leave Blank</td>
<td></td>
</tr>
<tr>
<td><strong>Tax ID Type</strong>: From the drop-down, select Fed ID (for a US Entity) or SSN (for an individual). This information is on the W-9 or W-8BEN form.</td>
<td></td>
</tr>
<tr>
<td><strong>Citizenship</strong>: From the drop-down, select the appropriate citizenship status</td>
<td></td>
</tr>
<tr>
<td><strong>Non US Citizen</strong> - (1) The system will request selection of a Payment Type from a drop down listing. Select the appropriate payment type: Award, Educational Grants, Equipment Supplies, Honorariums, Royalties, Scholarships/Fellowships, Services, Stipends, or Travel. (2) Select the Visa Type from the drop-down listing. List of required documents to be uploaded will appear.</td>
<td></td>
</tr>
<tr>
<td><strong>Non US Entity</strong> - (1) The system will request the selection of a Payment Type from a drop down listing. Select the appropriate payment type: Computer Equipment Software, Equipment/Supplies, Maintenance/Service Agreements, Other, Royalties, Service, and Travel. (2) The system will display the series of W-8 forms required by Non-US Entities.</td>
<td></td>
</tr>
<tr>
<td><strong>US Citizen/Entity</strong> - Payment type is not required</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Location</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Description</strong>: From the drop down, select the appropriate address type.</td>
<td></td>
</tr>
<tr>
<td><strong>Country</strong>: Default is USA. Use the search feature view and add other countries.</td>
<td></td>
</tr>
<tr>
<td><strong>Address</strong>: Enter the correct address from the W-9 or W-8BEN form. Do not use punctuation in the Address.</td>
<td></td>
</tr>
<tr>
<td><strong>City</strong>: Enter the city</td>
<td></td>
</tr>
<tr>
<td><strong>State/Prov</strong>: Use the drop-down to select the state.</td>
<td></td>
</tr>
<tr>
<td><strong>Postal Code</strong>: Enter the 5-digit zip code or postal code for Non-US addresses.</td>
<td></td>
</tr>
<tr>
<td><strong>Phone</strong>: If the phone/fax numbers are not provided, you may leave these fields blank.</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Email</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Email</strong>: Enter the vendor’s email address</td>
<td></td>
</tr>
<tr>
<td><strong>No Email Provided</strong>: Check if the vendor has not provided an email address</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Other Information</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Payment Methods</strong>: Check all payment methods accepted by the vendor: ACH/EFT, Pcard, and Check. <strong>Non-US vendors may only receive check payments</strong>.</td>
<td></td>
</tr>
</tbody>
</table>
10. Check the "I have verified that this information is correct" check box to affirm all entered information is correct and select Submit for Approval.

11. Upon submission the user will be directed to the Request Details and Documentation page.

12. For some US Citizen vendors receiving certain refunds or reimbursements, a W-9 Form may not be required. In this case click on the One Time Vendor Tab and in the Justification box enter an explanation. The AP Vendor Processor will review the request and make a determination as to whether or not the exception will be granted.

13. Using the Upload Document button, upload the required documentation in separate attachments to complete the request. A W-9 and ACH form are required for all US Citizen/Entity supplier requests (see #12 for exceptions). The documentation requirements for foreign nationals is based upon visa type. See page 6-7 for more details. Approved file types included: PDF, TIF or JPG.
14. Click **Complete Request** to finalize the vendor request and forward it to AP Vendor Processing for US Citizen/Entity vendors. Note: US Citizen/Entity Suppliers can not be forwarded until a completed W-9 is uploaded, unless the One Time Vendor checkbox is selected with a Justification.

15. New requests for Non-US Citizen/Entity vendors will be forwarded to the NRA Certifier for approval and then to the AP Vendor Processor for final approval.

16. After **Complete Request** is clicked, an email containing the Request ID and Request Status will be sent to the user. The system will forward the user to the main page of the Vendor Center.

17. Review the Recent Requests for the current status:

   - Awaiting ACH From Vendor (US Citizen/Entities only) Note: AP Vendor Processing will not review request without an ACH form.
   - Awaiting Documentation (if no W-9 or W-8BEN and required documentation has been uploaded)
   - Awaiting NRA Certification (for Non-US Citizen/Entities) Note: the NRA Certifier has the option of “Recycling” the request if the uploaded documents are not sufficient. Users will receive an email detailing what steps are needed to complete the request.
   - Awaiting AP Review (all required documentation has been uploaded)

18. Once AP Vendor Processing approves the request, the user will receive an email notification containing the new vendor ID number.
### Adding A New Employee Vendor

1. Select **Add Vendor**

2. Select **Employee**

3. Review the allowable **Employee Types**. If the employee is not one of the allowable types, follow the steps to add a supplier.

   - SPA Employee
   - EPA Employee
   - County EPA Employee
   - Post Doc Employee
   - Law Enforcement Officer
   - County SPA Employee
   - Supplemental Pay Employee
   - No Pay Employee
   - Temporary Employee (non-active student)

4. Search Employee ID, First Name or Last Name.

5. If the search returns the desired employee, based upon verification of the Employee ID # and Department, **AND** no Vendor ID # is listed, then click on **Add** button and continue with steps starting on page 9.

### Important Employee Information:

- Employees are not required to submit a Vendor ACH Enrollment Form, W-9 or W-8BEN Form.
- The request status will remain **Awaiting Documentation** until AP Vendor Processing approves request.
Adding A New Student Vendor

1. Select Add Vendor

2. Select NCSU Student

Important Student Information:

- Active NC State University students are automatically entered into the vendor system; therefore, there is no need to enter a request to enter the student. Students must update his or her information through MyPack Portal/Students.

- Non-NC State University Students are to be entered in the vendor system as Suppliers.
Updating An Existing Vendor

Once added as a vendor, a vendor’s information may change. Vendor changes may include:

- Name (Requires a new W-9 or W-8BEN)
- Location
- Classification
- Email
- Update Documentation, such as visa, passport, etc.

To Initiate a Vendor Update

1. From the Vendor Center, select Update/Search Vendors
2. Enter the Vendor ID, Vendor Name, or Employee ID in the Vendor Information section.
3. Click Search button.
4. From the displayed results, select Update Vendor for the vendor record requiring an update.
   If Vendor is not listed in the search results, modify your search or click Add to add a new vendor.
5. Select the type of change or changes required.

6. Enter the new information into the inserted sections.

7. Select *Submit Change Request* to forward the request to AP Vendor Processing for US Citizen/Entities.

8. Updates to Non-US Citizen/Entities must receive initial approval by the NRA Certifier before being routed to AP Vendor Processing.
9. The system will take the user to the Request Details page. Review the status and any pending documentation.

10. Attach the requested documentation. Name change requests require a W-9 or W-8BEN.

11. Select **Complete Request** to finalize the request and forward the request to AP Vendor Processing.

12. Once Complete Request is clicked the user will receive an email notification containing the Request ID and the Request Status.

13. Once reviewed and approved by AP Vendor Processing, an approval email will be sent to the user.