



Submitting a Supplier Add Request Form

This guide walks you through completing and submitting a Supplier Add Request Form.

State of Vermont
Department of Finance & Management
VISION 9.2

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Revisions to Manual

April 2021

- Corrected query name on page 17

December 2018

- Manual written

Completing a Supplier Add Request Form

Situations where this form is used: When you need to have a supplier added to VISION.

Supplier Add Request Form

USE THIS FORM TO REQUEST NEW SUPPLIERS THAT ARE LOCATED IN THE U.S. OR CANADA

SUPPLIER REQUEST PROCESS

Step 1: Use the Form Instructions below to complete all required fields (marked with an asterisk) and optional fields if the information is available.

Step 2: Attach all supporting documentation (W-9 Forms, W-8 Forms, ACH Authorization Forms, email correspondence, etc...) on the attachments page.

Step 3: Double check the request to make sure that all fields contain the correct information and that all proper documentation is attached. This step is important because once a requester submits a request they will not be able to access it again unless it is denied by Financial Operations. Additionally, Financial Operations cannot change any information that is entered by the requester so if anything is entered incorrectly or entered into the wrong fields, the request will be denied by Financial Operations and sent back to the requester for correction and resubmission.

Step 4: Submit the request for approval. All requests will be handled by priority level by the date/time in which the requests are received. Processing times run anywhere from the same day to five business days.

Step 5: Check the status of your requests by running the VT_SUPPLIER_FORMS query. This query will provide you the new Supplier ID number for approved requests and it will also show requests that have been denied so that you can view them to see if corrections are needed or not.

WorkCenter Navigation: AP WorkCenter > Suppliers > Supplier Add Request Form

Navigator Menu Navigation: Suppliers > Supplier Information > Supplier Forms > Supplier Add Request Form

The **Search/Fill a Form** page opens, click the **Add a New Value** tab. If a Form field open, use the lookup and choose the Supplier Add Request Form (VT_SUPL) from the list and click **Add**.

Search/Fill a Form

Find an Existing Value | Add a New Value

Form 🔍

Add

Look Up Form [x] [Help](#)

Form begins with

Portal Label begins with

Look Up | Clear | Cancel | Basic Lookup

Search Results

View 100 | First | 1-4 of 4 | Last

Form	Portal Label
VT_EXP_ACC	Vision Expense Access Request
VT_SEC_REQ	Vision Module Security Form
VT_SUPL	Supplier Add Request Form
VT_UPDSUPL	Supplier Update Request Form

The **Supplier Add Request Form** opens. You must enter information into all required fields (marked with an asterisk) but it is recommended that you enter as much information as possible into the optional fields:

Form | Instructions | Attachments

Supplier Add Request Form

*Subject

Priority Due Date

Status

*Business Unit

Urgent/Critical Reason: Required if Urgent or Critical Priority is chosen above

*Request Reason: Detailed Reason for Setup and/or Other Reason for Urgent/Critical Priority

254 characters remaining

Supplier Information

*Payment Frequency: One-Time=Will be Paid Once; Regular=Will be Paid More Than Once

*Supplier Category: Choose what category this supplier best falls into

*Supplier Service: Choose category that best describes this supplier or services they provide

*Supplier Name: Line 1 of W-8 or W-9 Form. For individuals use Lastname,Firstname no spaces

Supplier Name (cont): Use for additional characters that would not fit into Supplier Name field

DBA Name: Enter 'Doing Business As' name (if applicable)

Payment Mailing Address Information

*Country: Select the appropriate Country from the dropdown list

*Address Line 1: Enter the first line of the address

Address Line 2: Enter the second line of the address if necessary

Address Line 3: Enter the third line of the address if necessary

Address Line 4: Enter the fourth line of the address if necessary

*City: Enter the City

*State/Province: Select the appropriate State or Province from the dropdown list

*Zip Code: Enter the Zip Code in acceptable format (see instructions)

Contact Address Information

Country: Select the appropriate Country from the dropdown list

Address Line 1: Enter the first line of the address

Address Line 2: Enter the second line of the address if necessary

Address Line 3: Enter the third line of the address if necessary

Address Line 4: Enter the fourth line of the address if necessary

City: Enter the City

State: Select the appropriate State abbreviation from the dropdown list

Zip Code: Enter the Zip Code in acceptable format (see instructions)

General Request Information

The screenshot shows the 'Supplier Add Request Form' with the following fields and callouts:

- 1**: Points to the *Subject field containing 'Training example'.
- 2**: Points to the Priority dropdown menu, currently set to '1-Critical'.
- 3**: Points to the Due Date field containing '12/04/2018'.
- 4**: Points to the *Business Unit field containing '01110'.
- 5**: Points to the Urgent/Critical Reason dropdown menu, currently set to 'Invoice Past Due'.
- 6**: Points to the *Request Reason text area, which contains the text: 'New supplier, initial invoice was incorrectly entered, discovered 2 days before due date.' Below the text area, it indicates '165 characters remaining'.

- 1. Subject** - Enter the name of the supplier that you wanted added or updated
- 2. Priority** - Choose the appropriate priority from the dropdown box
 - Low = Do not choose this option. It is not being used
 - Standard = Choose this option if the supplier can be setup within 3-5 business days
 - Urgent = Choose this option if you need to have the supplier setup in 1-2 business days
 - Critical = Choose this option if you need the supplier setup the same day
- 3. Due Date** - A date can be chosen or the field can be left blank. Dates entered will not affect processing time
- 4. Business Unit** - Enter your General Ledger Business Unit number from the dropdown
- 5. Urgent/Critical Reason** - Choose the appropriate reason from the dropdown box if an urgent or critical priority was chosen
- 6. Request Reason** - Use this field to explain what the supplier will be paid for, to provide a detailed reason for an urgent or critical priority that is not specified in the dropdown box above, and/or to provide any other pertinent information for the request

Supplier Information Section

Supplier Information

*Payment Frequency: One-Time=Will be Paid Once; Regular=Will be Paid More Than **7**

Once

*Supplier Category: Choose what category this supplier best falls into **8** **9**

*Supplier Service: Choose category that best describes this supplier or services they **9**

provide

*Supplier Name: Line 1 of W-8 or W-9 Form. For individuals use Lastname,Firstname no **10**

spaces

Supplier Name (cont): Use for additional characters that would not fit into Supplier Name **11**

field

DBA Name: Enter 'Doing Business As' name (if applicable) **12**

- 7. Payment Frequency** - Choose the value from the dropdown box that best describes how frequently you will be paying the supplier. One-time means that you expect to issue one payment to the supplier, and regular means that you expect to issue multiple payments to the supplier
- 8. Supplier Category** - Choose the value from the dropdown box that best describes what the supplier is or what services they provide
- 9. Supplier Service** - Choose the value from the dropdown box that best describes the primary service that this supplier is in the business of providing
- 10. Supplier Name** - Enter up to 40 characters of the supplier's name from Line 1 of the W-8 or W-9 Form. Individuals should be entered as Last Name,First Name with no spaces in between the comma and the first name (40 characters max)
- 11. Supplier Name (cont)** - Use this field to enter any remaining characters that do not fit into the Supplier Name field
- 12. DBA Name** - Enter a Doing Business As name (if applicable.) This can be found on Line 2 of the W-9 Form

Payment Mailing Address Information Section

Payment Mailing Address Information

13 → *Country: Select the appropriate Country from the dropdown list 🔍

14 → *Address Line 1: Enter the first line of the address

Address Line 2: Enter the second line of the address if necessary

15 → Address Line 3: Enter the third line of the address if necessary

Address Line 4: Enter the fourth line of the address if necessary

17 → *City: Enter the City

18 → *State/Province: Select the appropriate State or Province from the dropdown list 🔍

16 → *Zip Code: Enter the Zip Code in acceptable format (see instructions)

13. Country - Choose the appropriate Country from the dropdown list

14. Address Line 1 - Enter the first line of the address

15. Address Line 2, 3, and 4 - Enter additional address lines if necessary

16. City - Enter the City


17. State/Province - Choose the appropriate State or Province from the dropdown box

18. Zip Code - Enter the zip code:

- Acceptable U.S. Zip Code formats are 55555 or 44444-1111
- Acceptable Canada Zip Code formats are 51A 0B1 (Letter-Number-Letter <Space> Number-Letter-Number)

Contact Address Information Section

Contact Address Information

Country: Select the appropriate Country from the dropdown list  **20**


Address Line 1: Enter the first line of the address **20**

Address Line 2: Enter the second line of the address if necessary

Address Line 3: Enter the third line of the address if necessary **21**

Address Line 4: Enter the fourth line of the address if necessary

City: Enter the City **22**

State: Select the appropriate State abbreviation from the dropdown list  **23**

Zip Code: Enter the Zip Code in acceptable format (see instructions) **24**

19. Country - Choose the appropriate Country from the dropdown list

20. Address Line 1 - Enter the first line of the address

21. Address Line 2, 3, and 4 - Enter additional address lines if necessary

22. City - Enter the City

23. State/Province - Choose the appropriate State or Province from the dropdown box

24. Zip Code - Enter the zip code:

- Acceptable U.S. Zip Code formats are 55555 or 44444-1111
- Acceptable Canada Zip Code formats are 51A 0B1 (Letter-Number-Letter <Space> Number-Letter-Number)

Supplier Contact Information Section

Supplier Contact Information

25 → Contact Name: Enter the Supplier Contact Name

Contact Title: Enter the Supplier Contact Title ← 26

Internet Address: Enter the internet address for the supplier's website.

← 27

242 characters remaining

Email Address: Enter the Supplier Contact email address ← 28

29 → Telephone Area Code: Enter the 3-digit telephone area code

Telephone Number: Enter the 8-digit telephone number in 999-9999 format

31 → Telephone Extension: Enter the telephone extension if applicable

Fax Area Code: Enter the 3-digit fax area code ← 32

Fax Number: Enter the 8-digit fax number in 999-9999 format ← 30

33 →

- 25. **Contact Name** - Enter the contact's name
- 26. **Contact Title** - Enter the contact's title
- 27. **Internet Address** - Enter the internet address for the supplier's website
- 28. **Email Address** - Enter the supplier contact email address
- 29. **Telephone Area Code** - Enter the 3-digit telephone area code
- 30. **Telephone Number** - Enter the telephone number in 999-9999 format
- 31. **Telephone Extension** - Enter the telephone extension if applicable
- 32. **Fax Area Code** - Enter the 3-digit fax area code
- 33. **Fax Number** - Enter the fax number in 999-9999 format

IRS & Other Information Section

The screenshot shows a form titled "IRS & Other Information" with several fields. Red circles with numbers 34 through 39 are placed around the form, with red arrows pointing to specific fields:

- 34: Points to the "Federal Employer ID Number" dropdown menu.
- 35: Points to the "031234567" text input field.
- 36: Points to the "C Corporation/LLC C Corp" dropdown menu.
- 37: Points to the empty "Other Explanation" text area.
- 38: Points to the "11/10/2018" text input field.
- 39: Points to the "123456789" text input field.

- 34. TIN Type** - Choose appropriate TIN type for US Suppliers (Not required for refunds)
- 35. TIN** - Enter 9-digit TIN with no dashes (Only required for USA & CAN Suppliers with US TIN)
- 36. Classification** - Choose the Appropriate Federal Tax Class or Entity Type for US & CAN Suppliers
- 37. Other Explanation** - Use this field to enter what is written in the space provided if the supplier chooses the 'Other' box in section 3 of the W-9 Form
- 38. Certification Date** - Enter the exact date that the supplier signed the W-8 or W-9 form
- 39. DUNS Number** - Enter the supplier's DUNS number if provided

All other fields are completed by Financial Operations

FINANCIAL OPERATION USE ONLY

Information in this section must only be entered by Financial Operations Staff. Information entered into these fields by the requesting department will result in the request being returned for correction and resubmission.

Withholding Applicable

Payment Alternative Name 1

Payment Alternative Name 2

Withholding Alternate Name 1

Withholding Alternate Name 2

Bank Options: If no ACH form is provided, then leave default value

Bank Code

Bank Account Key

Payment Method Options: If no ACH form is provided, then leave default value

Payment Method

Payment Format

Bank Name

Bank ID Qualifier

Bank ID Number

DFI Qualifier

Bank Account Number

Bank Account Type

Supplier Type

Payment Terms Options: If not for a refund, then leave blank

Payment Terms ID

More Information

Save

Notify

[Form](#) | [Instructions](#) | [Attachments](#)

40. Click Save

41. Note the Seq # at the top of the form

[Form](#) | [Instructions](#) | [Attachments](#)

Seq # 11 **Supplier Add Request Form**

*Subject

Priority Due Date

Status

Adding Attachments

Click the **Attachments** tab:

Form | Instructions | **Attachments**

12 Supplier Update Request Form

*Subject Training example 2

Download Templates Personalize | Find | View All | First 1 of 1 Last

Description	Attached File	Open
1		Open

Upload your attachments Personalize | Find | View All | First 1 of 1 Last

*Description	Attached File	Attach	Open
1		Attach	Open

Notify

Form | Instructions | Attachments

Click the **Attach** button, the Upload window opens:

File Attachment

Help

Browse... Attachment Sample.pdf

Upload Cancel

Click **Browse** to find the file you want to attach

NOTE: The only forms that should be attached to Supplier Add Request Forms are any applicable W-8 or W-9 forms, Supplier ACH Request Forms, or any documentation provided by the supplier outlining a sale, reincorporation, or change in federal tax status. Please do not attach supplier invoices.

Click **Upload**

Form | Instructions | **Attachments**

ieq # 12 Supplier Update Request Form

*Subject Training example 2

Download Templates Personalize | Find | View All | First 1 of 1 Last

Description	Attached File	Open
1		Open

Upload your attachments Personalize | Find | View All | First 1-2 of 2 Last

*Description	Attached File	Attach	Open
1 Attachment_Sample.pdf	Attachment_Sample.pdf	Attach	Open
2		Attach	Open

Notify

Form | Instructions | Attachments

Click the **+** icon to add another attachment

W-9 Form Guidelines

- A current W-9 form must be attached for all regular suppliers and one-time reportable payments
- The most recent version of the W-9 form can be found in the forms section of the [IRS website](#)
- W-9 forms must be physically signed and dated within the last six months. We do not accept electronically signed W-9 forms
- W-9 forms will not be accepted if there is any reason to question the authenticity of the form. This includes but it not limited to the following situations:
 - Any original information is crossed out, written over, or covered up
 - Form is electronically signed in any manner. This includes drop and drag signatures.
 - Form is partially typed and partially handwritten
 - Form is handwritten in multiple colors of ink
- Financial Operations has the right to request a new W-9 form at anytime if it is deemed that something is questionable, illegible, or unclear
- State of Vermont employees must not fill out any portion of a W-9 on a vendor's behalf or instruct a vendor how to fill out the form
- State of Vermont employees must not instruct a supplier on how to properly complete a W-9 form. The IRS provides comprehensive instructions to help suppliers fill out the forms correctly. If a supplier needs assistance with completing a W-9 form properly, then they should seek the assistance of their tax professional, accountant, or the IRS directly

W-8 Form Guidelines

- An appropriate and current W-8 form must be submitted for all foreign individuals and entities that do not have a United States Tax Identification Number
- The most recent versions of the W-8 forms can be found in the forms section of the [IRS website](#)
- The guidelines for the completion and submission of W-8 forms are exactly the same as those listed above for W-9 forms

ACH Authorization Form Guidelines

- A current Vendor ACH Authorization Form must be attached to setup a supplier to receive payments via direct deposit
- The most recent version of the Vendor ACH Authorization Form can be found Forms page of the [Finance and Management website](#)
- All fields of the Vendor ACH Authorization Form must be filled out with the exception of the vendor id number
- A voided check should not accompany a Vendor ACH Authorization Form
- Vendor ACH Authorization forms must be signed and dated within the last 30 days
- All other guidelines for the completion and submission of Vendor ACH Authorization Forms are exactly the same as those listed above for W-9 and W-8 forms

Submitting the Form

Form | Instructions | Attachments

Seq # 11 **Supplier Add Request Form**

*Subject Training example 1

Priority 1-Critical Due Date 12/04/2018

Status Initial Preview Approval **Submit**

The Review/Edit Approvers page displays:

Supplier Add Request Form

Subject Training example

Review/Edit Approvers

Supplier Add Request Form: 11:Pending Start New Path

1

Pending Multiple Approvers Supplier Approval

OK

42

43

42. Click the **Multiple Approvers** link to see the pool of approvers:

Mozilla Firefox

https://fintraining.erp.vermont.gov/psc/FMTRN_13/EMPLOYEE/ERP/s/WEBLIB_EOAW.EOAW_MON_APPRS.F

Approver #1

Name: Jamie A Sheltra
Empl ID: 22146
Department: 1115001000
Supervisor ID:
Telephone:
Reports To Position Number: 020053
Email ID: jamie.sheltra@vermont.gov

Approver #2

Name: Michelle L. White
Empl ID: 09735
Department: 1115001000
Supervisor ID:
Telephone:
Reports To Position Number: 020053
Email ID: michelle.white@vermont.gov

Approver #3

Name: Ruthellen Doyon
Empl ID: 80254
Department: 1115001000
Supervisor ID:
Telephone:
Reports To Position Number: 027003
Email ID: ruthellen.doyon@vermont.gov

Approver #4

Name: Rhonda Partlow
Empl ID: 09869
Department: 1115001000
Supervisor ID:
Telephone:
Reports To Position Number: 020053
Email ID: rhonda.partlow@vermont.gov

43. Click **OK**

The **Supplier Add Request Form** displays:

The screenshot shows the 'Supplier Add Request Form' interface. At the top, there are tabs for 'Form', 'Instructions', and 'Attachments'. The form title is 'Supplier Add Request Form' with 'Seq # 11' to its left. The '*Subject' field contains 'Training example'. The 'Priority' is set to '1-Critical' and the 'Due Date' is '12/04/2018'. The 'Status' is 'Pending', which is highlighted with a red circle containing the number '44' and an arrow pointing to it. There are buttons for 'Approver Status' and 'Cancel Approval'. The '*Business Unit' is '01110' and the 'Urgent/Critical Reason' is 'Invoice Past Due'. The '*Request Reason' field contains the text: 'New supplier, initial invoice was incorrectly entered, discovered 2 days before due date'. Below this is a 'Supplier Information' section with fields for '*Payment Frequency' (Regular), '*Supplier Category' (Other), '*Supplier Service' (Other), '*Supplier Name' (Test,TE), and 'DBA Name'.

44. Status is Pending

Once a form has been submitted, you will not be able to access the form to modify/cancel it. If you need to modify/cancel a submitted form, then you will need to submit a deny request VISION.SupplierRequests@vermont.gov.

Denied forms will show up as a notification on your worklist and will include denial comments. The reason for the denial will need to be corrected and then the form will need to be resubmitted.

Approved form will not show up as a notification on your worklist.

To find the status of a submitted form, or to see the new Supplier ID that was created from an approved form, run the VT_SUPPLIER_FORM query.