Requisition Backup and W-9 Requirements

Procurement and Contract Services is working on process improvements. Two areas that were identified as process slowdowns are requisition backup and W-9's.

**BACKUP REQUIREMENTS**

We receive backup in many different ways (email, fax and regular mail). Unfortunately, it doesn’t always arrive at the correct address when sent by fax and mail – causing delays. We end up asking people to send it again or OCGA needs a copy and you have to send it to them, which can be extremely frustrating. Therefore, we have created a Google Group that will be shared by both Procurement and OGCA – so you will only need to send it to one address as we all have access to the information.

Starting in FY12 all requisition backup must be sent to Procurement by email as per the following instructions. The requisition number must be noted on all pages. Note, there is a 25MB size limitation. Please contact us if there is any issue or you need assistance.

1. Address the email to uaf-pcs-backup@alaska.edu.
2. Subject is the Requisition number (R and all 7 digits as assigned by Banner). **DO NOT** type anything else on this line.
3. Attachments need to be PDF files
4. Attachments should be separated and named as follows:
   a. Backup
   b. W-9
5. You do not need to type any message in the email.

**W-9 REQUIREMENTS**

Departments are responsible for getting the W-9 for new vendors

The vendor ID field should never be left blank.
- A search must be done to see if the vendor is in the vendor database and assign the appropriate vendor to the requisition.

1. Click on the search arrow for vendor inside the requisition create form.
   
   ![Requestor/Delivery Information](image)
   ![Vendor Information](image)
   ![Commodity/Accounting](image)

   **Vendor:**

   **Address Type:**

   **Sequence:**

   **Street Line 1:**

   **Street Line 2:**

   **Street Line 3:**

   **Discount:**

   **Tax Group:**

   **Currency:**

2. Choose the Entity Name/ID Search (FTIIDEN)
3. Enter the part of the vendor name to query on, as shown below. Double click on the ID to bring it back to the requisition and go to Step 5. **NOTE:** Vendors IDs should begin with 1 letter and numbers; @ and numbers; or a 3 million number. **DO NOT USE** multiple alpha numbers.

<table>
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<tr>
<th>ID</th>
<th>Last Name</th>
<th>First Name</th>
<th>Middle Name</th>
<th>Entity Ind</th>
<th>Change Ind</th>
<th>V</th>
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4. If the vendor is not in the database, exit this screen and enter **“NEWVEND”** as the vendor ID. This is new process that will solve a huge current Banner “bug” that we are dealing with.

5. Continue entering the requisition as normal.