LDEO Purchasing
Operating Procedures

LDEO Vendor Approval Process

Summary

Columbia University requires that every vendor must be validated and approved before providing goods and/or services. Once approved, vendors become part of the Columbia University vendor database. This document outlines the process for validating and approving vendors to be entered into the database.

Definitions

FINSYS: Columbia University Financial Systems, accessible from https://my.columbia.edu

UNI: University Network ID

W-8: IRS form that grants a foreign vendor an exemption from certain U.S. information return reporting and backup withholding regulations.

W-9: IRS form used request the vendor’s taxpayer identification

1. The LDEO Purchasing Staff should secure a W-9 from a domestic supplier or a W-8 from a foreign vendor.

2. The LDEO Purchasing Staff ensures that all domestic vendors have completed the Columbia University vendor questionnaire that can be found at: https://ssl.procurement.columbia.edu/purchasing/qualification/index.html.

   NOTE: Foreign vendors do not need to complete the vendor questionnaire.

3. The LDEO Purchasing Staff enters the vendor data into the AP/CAR Section of FINSYS:
   i. Log onto “Vendor Create” module in the AP/CAR section of FINSYS (UNI and password required for access to FINSYS)
   ii. Click on “New” tab
   iii. Enter vendor name as listed on W-9 (or W-8). Click “Save and Continue”
   iv. Answer questions as they relate to the vendor and complete all screens, including the Employer Identification Number (EIN), vendor address, phone, and e-mail data
   v. Click “Release for VM Approval” tab
4. The LDEO Purchasing Staff faxes or e-mails signed W-9 (or W-8) to Vendor Maintenance vendormaintenance@columbia.edu for approval.

5. The LDEO Purchasing Staff communicates with Vendor Maintenance Staff in the CU Procurement Office to ensure that the vendor has been approved and/or provide additional information to Vendor Maintenance Staff as needed.

Roles and Responsibilities

<table>
<thead>
<tr>
<th>Roles</th>
<th>Responsibilities</th>
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<tbody>
<tr>
<td>LDEO Purchasing Staff</td>
<td>Requests W-9 from vendor and submit link to questionnaire</td>
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<tr>
<td></td>
<td>Enters data into FINSYS</td>
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<td>Submits data to CU Purchasing</td>
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<tr>
<td>Vendor</td>
<td>Submits IRS Form and complete questionnaire</td>
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<td>Provides W-9 (or W-8) to LDEO Purchasing Staff</td>
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<tr>
<td>CU Purchasing</td>
<td>Reviews Data</td>
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<td>Approves vendor</td>
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Relevant Links

http://procurement.columbia.edu/purchasing/vendor_validation.html
https://ssl.procurement.columbia.edu/purchasing/qualification/index.html