

**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](mailto: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

Roles	Responsibilities		
LDEO Purchasing Staff	Requests W-9 from vendor and submit link to questionnaire	Enters data into FINSYS	Submits data to CU Purchasing
Vendor	Submits IRS Form and complete questionnaire	Provides W-9 (or W-8) to LDEO Purchasing Staff	
CU Purchasing	Reviews Data	Approves vendor	

### Relevant Links

[http://procurement.columbia.edu/purchasing/vendor\\_validation.html](http://procurement.columbia.edu/purchasing/vendor_validation.html)

<https://ssl.procurement.columbia.edu/purchasing/qualification/index.html>