This guide covers instructions for completing the Vendor/Payee Request web form. As this information populates multiple systems, it is critical for us to have your current and accurate information.

Logging in to the Vendor/Payee Profile Request Form

You will receive an email from Vendor Maintenance confirming that Vendor Management Department has received your request to add your organization. It contains the link to log in to the Vendor/Payee Request Form with your Username and Password.

1. Click the URL to access the Form.

   ![Vendor/Payee Request Form](image)

   1. Enter Address information into the appropriate fields. Fields with an * are required.
   2. If you are also entering a Billing Address, click Add more values.

Entering Address Details

The Address Info section of the form allows you to enter addresses for your Billing Address and, if you require Purchase Orders, Ordering Address. If you have a New York based address, you can also add it.

Entering an Ordering Address (if you require Purchase Orders)

1. Select Ordering Address from the Address Description dropdown.

   ![Ordering Address](image)

   2. Enter Address information into the appropriate fields. Fields with an * are required.
   3. If you haven’t already entered an Ordering Address and need to do so, click Add more values.

Entering a Billing Address

1. Select Billing Address from the Address Description dropdown.

   ![Billing Address](image)

   2. Enter Address information into the appropriate fields. Fields with an * are required.
   3. If you haven’t already entered an Ordering Address and need to do so, click Add more values.

Note: Contact the Finance Service Center (refer to the end of this document for contact information) if you need to reset your password or have the Vendor/Payee Request Form resent.
Entering Local Address Info (New York Address)

1. Select Yes from the question dropdown Local Address Info section.

The Address fields appear.

2. Enter Address information into the appropriate fields. Fields with an * are required.

Entering Vendor Categorization Details

The Vendor Categorizations section contains a mixture of optional and required fields (indicated by *). If your Billing or Ordering Address is in the United States, fields for Hub Zone and Certifying Agency Approval appear in this section and will not appear if your address is outside the United States.

1. Optional fields include SIC Codes which you can select to categorize your business. For more information, click the SICCODE.com link. Select the appropriate Code(s)/Category from the dropdowns.

2. Select the range that you feel best represents the Number of Employees from the dropdown.

3. Select the range that you feel best represents the Annual Gross Revenue from the dropdown.

4. If your Billing or Ordering Address is in the United States, the HUB Zone field appears. You can select the applicable item from the dropdown. For more information regarding this field, click the link below the dropdown.

5. Optionally, select an Ethnicity from the dropdown.

6. If your Billing or Ordering Address is in the United States, the required field regarding Approval from a Certifying Agency or Body appears.
   - If you select Yes from the dropdown to the question, a Certification section appears. Complete the required fields in this section.
   - If you select No, a field for Self-Certifying or Certified with a Non-Government Agency appears. Select the appropriate answer.

Note: If you have multiple certifications, click Add more values.
Entering a Payment Method
You can select if you want payment via ACH/Wire or Check as the Payment Method.

If you select ACH/Wire, a section appears for you to complete the ACH/Wire Authorized Person’s Info. Complete the required information.

Certifying, Previewing, and Submitting
1. Select Agree to the Certify questions.

2. Click Preview. The Preview screen appears with your entries and indicates any errors or missing information.

3. Click Submit.

Entering ID Numbers
If your Billing or Ordering Address is in the United States, the ID Numbers section appears.

1. Optionally, enter your DUNS Number if you have one.
2. Select the ID Type from the dropdown that you will type in the ID Number field.
3. Type the ID Number for the ID Type you selected.

Viewing Vendor Submission Status
2. Enter the Request ID or ARC Vendor (Supplier Number).
3. Click Submit. The Search Result for the matching Vendor Names(s) appear if it is in the system. The Current Status displays the current approval status of the vendor.
Getting Help

http://finance.columbia.edu/content/finance-service-center

You can log an incident or request a service via Service Now
https://columbia.service-now.com

Or, you can contact the Service Center by phone: (212) 854-2122