

SUPPLIER

Request to Add or Update Supplier

Domestic or Foreign

Instructions:

Complete this form to add or update a supplier. Please allow 3 to 5 business days to complete your request. Incomplete submissions may result in a delay of processing. Requests to add or update suppliers are only accepted from Procurement Staff and SOS Buyers. If this is a RUSH, please submit your request by 12:00 pm. Requests received after 12:00 pm, will be processed the next business morning.

To submit form, go to <https://help.caltech.edu> or log in to <https://access.caltech.edu> and select *Caltech Help*. Use the following request types: *Procurement > Supplier Management > Add New Supplier or Update Supplier*. Attach your completed form with any supporting documentation.

Section 1 – Action Requested:

- Add New Supplier Update Supplier (select type of change below, complete Supplier Name, and only items to be changed)

Supplier Number:	
<input type="checkbox"/> Address Update	<input type="checkbox"/> Correct Remit Site (attach copy of inv)
<input type="checkbox"/> Name Change (old name: _____)	<input type="checkbox"/> Add Remit Site (attach copy of inv)
<input type="checkbox"/> Other _____	

Section 2 – Supplier Information:

Supplier Name (followed by DBA name if applicable):		Supplier Contact Name (First & Last):	
Contact Email:	Contact Phone #:	Contact Fax #:	
Remit Address	City:	State:	Zip Code:
Purchase Order Address (if different)	City:	State:	Zip Code:
Preferred Method of PO Delivery			
<input type="checkbox"/> Fax _____		<input type="checkbox"/> email _____	
DUNS # (if applicable):	Primary NAICS Code :		
Preferred Method of Payment			
<input type="checkbox"/> Credit Card	<input type="checkbox"/> EFT / Direct Deposit	<input type="checkbox"/> Wire Transfer	<input type="checkbox"/> Check

Section 3 – Tax Status

Type of Payment/Purchase					
<input type="checkbox"/> Goods	<input type="checkbox"/> Services	<input type="checkbox"/> Prize/Award	<input type="checkbox"/> Reimbursement	<input type="checkbox"/> Rent/Lease	<input type="checkbox"/> Royalty/Software
<input type="checkbox"/> Individual	<input type="checkbox"/> Corporation	<input type="checkbox"/> Partnership	<input type="checkbox"/> Foreign Business	<input type="checkbox"/> Foreign Individual	

Section 4 – Complete for Caltech Individuals Only

<input type="checkbox"/> Caltech Employee	<input type="checkbox"/> Caltech Student	<input type="checkbox"/> Caltech Visiting Associate
UID #: _____		
For all individuals, <u>do not include Social Security Numbers</u> . Supplier Management will contact the individual directly to obtain an IRS Form W-9.		
Continue to Page 2		Updated Jan 2016

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Continued from page 1

Section 5 - Tax Questionnaire (REQUIRED for SERVICES, PRIZE/AWARD, RENT & ROYALTY)

Payee/Individual:

US Citizen/Resident Alien Yes No California Resident Yes No

Do you expect to pay the payee more than \$1500 this calendar year? Yes No

Payee's permanent place of business: Inside California Outside California Inside USA Outside USA

Payees Providing Service:

Services Performed in USA? Yes No Services Performed in California? Yes No

Payees of Rent/Lease of Real Property:

Property in USA? Yes No Property in California? Yes No

Payees of Royalties/Software:

Patent/License used in USA? Yes No Patent/License used in California? Yes No

Section 6 - Requestor Information

Comments:

Requestor's Name:

Requestor's Extension #:

SOS Buyer? Yes No

FOR SUPPLIER MANAGEMENT USE ONLY:

Notified Requestor: Email Phone Verbal Written

Supplier # _____