



## Vendor Setup Form Instructions

Thank you for your interest in The Ohio State University. This form is used to add a new vendor to the vendor database, or to change information to an existing vendor. Purchase orders and payments can only be issued for vendors that are in the database. We have provided this information to assist you in completing the required University form.

### Return the completed form to your University contact. (Page 1 and 2 only)

All information on this form is required unless noted.

**Note:** If the tax classification of "Individual" is selected, complete only page 1. All others must complete both page 1 and 2.

### Page1: IRS Substitute W-9

Page 1 of this form is a Substitute W-9. Per the IRS, "If you are a U.S. person and a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9." (<http://www.irs.gov/pub/irs-pdf/fw9.pdf>)

General Information	
<b>OSU Employee</b>	Check YES or NO if you are currently an OSU employee. If you select yes, you will be contacted for further information.
<b>Individual or Legal Business Name</b>	Enter the complete Individual or Legal business name. This is the name used with the IRS.
<b>Business/Disregarded entity name (DBA)</b>	Enter if applicable. (DBA= Doing Business As) certain vendors may use a business name that is different than the name they use with the IRS.
<b>Addresses</b>	Enter all applicable addresses: Address-Payee's residence or Order-to location. Remit To Address- Address where payment should be sent. Foreign Address- Required for all Non-resident Aliens; must include US address if currently residing in the US.
<b>Phone/Fax/Email</b>	Enter all information.
Federal Tax Classification	
<b>Tax Classification</b>	<p>Check the appropriate box (as defined by the IRS. Reference IRS form W-9 Specific instructions, Page 2, Name.)</p> <ul style="list-style-type: none"> <li>• Individual*: If you are an individual, also provide your date of birth *You only need to fill out page 1 of the form               <ul style="list-style-type: none"> <li>○ Check one of the following as it pertains to you:                   <ul style="list-style-type: none"> <li>▪ US Citizen</li> <li>▪ Resident Alien</li> <li>▪ Non-Resident Alien: provide your country of citizenship. If already in the US or coming to the US, provide copy of your passport and proof of visa type. You may be contacted for further information.</li> </ul> </li> </ul> </li> <li>• Sole Proprietor: provide your date of birth</li> <li>• Other: provide tax classification if not listed on form</li> <li>• FATCA: <a href="http://www.irs.gov/Businesses/Corporations/Foreign-Account-Tax-Compliance-Act-FATCA">http://www.irs.gov/Businesses/Corporations/Foreign-Account-Tax-Compliance-Act-FATCA</a> <ul style="list-style-type: none"> <li>○ Enter your reporting and exempt payee code (if applicable)</li> </ul> </li> </ul>
Taxpayer Identification Number	
Enter the IRS issued Federal Employer Identification Number (FEIN) or a Taxpayer Identification Number (TIN). Individuals must list their Social Security Number (SSN). This will be a nine digit number.	
Certification	
Enter your name, date and title. Signature must be in ink; electronic signatures are not acceptable at this time.	