

What Do I Need to Attach to a Purchasing E-form?

Attaching supporting documents is required when submitting a purchasing E-form. Below is a list of the types of information that maybe required for each of the forms.

Campus Consultant Services E-form attachments:

- <u>W-9 form</u> required before payment may be processed, if the vendor is not in the Research Foundation system.
- Working Relationship Form
- Invoice from the Consultant

Direct Payment E-Form attachments

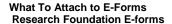
- <u>W-9 form</u> required before payment may be processed, if the vendor is not in the Research Foundation system.
- Receipt(s) or Invoice from with the
 - o Legal name and full address of the vendor,
 - o The date of service or purchase
 - Full description the service or purchase and
 - o The amount paid.
- If payment is for a meeting where food is provided:
 - o Include a list of the attendees and
 - o Description meeting purpose or agenda

Independent Contractor E-Form

- <u>W-9 form</u> required before payment may be processed, if the vendor is not in the Research Foundation system.
- Working Relationship Form
- Invoice from the Contractor/company

Participant Stipend E-Form

• <u>W-9 form</u> – required before payment may be processed, if the vendor is not in the Research Foundation system.





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Purchase Requisition E-Form

- <u>W-9 form</u> required before payment may be processed, if the vendor is not in the Research Foundation system.
- Quote for the merchandise or services requested, including legal name and address of the vendor, detailed description of items/services, cost.
- Purchases greater than \$50,000 are required to follow the Research Foundation Bids and Proposals Policy, contact the <u>Accounts Payable/Purchasing Services</u> Office for details.