



## 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:

- [W-9 form](#) – 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

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

### Independent Contractor E-Form

- [W-9 form](#) – 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

- [W-9 form](#) – required before payment may be processed, if the vendor is not in the Research Foundation system.



THE RESEARCH FOUNDATION  
*The State University of New York*

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**Research Foundation E-forms**

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### **Purchase Requisition E-Form**

- [W-9 form](#) – 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 [Accounts Payable/Purchasing Services](#) Office for details.