



The \$ource

Procurement Hints and Highlights



PREPARE FOR YEAR END NOW!

Please begin reviewing purchase orders that should be closed and multi-year contracts that need to be renewed or re-bid. June 30th will be here before we know it!

Some things to remember for requisitions...

- Enter Requisitions **BEFORE** obtaining services/products - otherwise you are making an **unauthorized purchase**.
- Only the President and his designees can sign documents that obligate the University.
- Contract (or Quote) and W9/W8 (if new vendor) need to be attached when submitting a Contract Office (or Non-Catalog) Form.
- Do not split purchases - purchasing limits need to be adhered to.
- Use "Supplier Unknown" when submitting a Requisition for a product or service that will be bid.
- Chart Code in MT\$ource defaults to M for University. Change Chart Code to F when using a Foundation Index.

Always submit the appropriate taxpayer information (W9/W8) and email address for a New Vendor

Form W-9
Rev. October 2018
Department of the Treasury
Internal Revenue Service

Request for Taxpayer Identification Number and Certification

Give Form to the requester. Do not send to the IRS.

1 Name (as shown on your income tax returns. Name is required on this line; do not leave this line blank.)

2 Business name (disregarded entity name, if different from above)

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3)

5 Address (number, street, and apt. or suite no.) See instructions. Requester's name and address (optional)

6 City, state, and ZIP code

7 List account number(s) here (optional)

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

For Purchasing Card (P-Card) Users

- If you're planning to be away from the university for an extended period of time, you need to fill out a P-Card Change in Cardholder Status Form to temporarily disable your P-Card.
- The university is tax-exempt for all purchases. You can request a copy of our Sales and Use Tax Certificate.

Both forms are available here:

<https://www.mtsu.edu/booffice/forms.php>



[Click Here for MT\\$ource - Staples Receipts and Returns Tip Sheet](#)

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