Agency Approver Manual

Internal Supplier Registration

Supplier Maintenance
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Introduction

This Internal Supplier Registration Agency Approver Manual provides instructions to an agency user that will be reviewing Internal Supplier Registrations for approval in Edison for their agency. Throughout the manual, there are screenshots using the following color indicators to highlight information important to reviewing a registration:

- **Green** – Registration Step
- **Red** – Instructional Steps
- **Blue** – Informational Text

There is a corresponding training course in Edison ELM which covers the material in this manual. In addition, the training course includes the Agency Submitter Training modules. **This course must be completed in Edison ELM before the Agency Approver role can be requested on the FA-1015 security form.** The course information is below:

- **Course Name:** Internal Supplier Registration Agency Approver
- **Course Code:** ISRAA200
- **Class Code:** FA-ISRAA

The screenshots in this manual are from the example registration used in the Agency Submitter and Agency Approver training videos.

The Internal Supplier Registration allows Business Units (BU) the capability to submit a request in Edison to add a new supplier to the Edison Supplier module. International suppliers, however, cannot be created through this online registration process. The supplier’s IRS W-8 must be submitted via email to Supplier.Maintenance@tn.gov with “FOREIGN” in the subject line of the email.

As shown in Appendix A: Internal Supplier Registration Workflow, after a registration is submitted by the Agency Submitter, the registration is routed to the Agency Approver. The designated role of Agency Approver is very critical to this process as this role is responsible for reviewing the Internal Supplier Registrations submitted by the agency’s designated Agency Submitter in its entirety for completeness, accuracy, and legitimacy according to the instructions provided in this manual and the Agency Submitter Manual. It is important the Agency Approver reviews the Agency Submitter Manual to ensure full comprehension of the expectations of the Agency Submitter.

**If any entry field or documentation attached to the supplier registration is incomplete, incorrect, or illegitimate, it is the Agency Approver’s responsibility to**
deny the registration or request more information from the Agency Submitter and inform the Agency Submitter of all the reasons the registration is being denied or more information is being requested.
Navigating to Review Internal Supplier Registrations

There are two paths to view submitted supplier registrations:

1. Worklist
2. Manage Request Approval

Worklist Navigation

1. Click the **NavBar** icon at the top of your screen:

2. Click the **Navigator** icon, and then click **FSCM** from the menu.

3. Scroll down and click on **Worklist**
5. Click **Worklist**

6. **Worklist** screen appears

7. Click the **Worklist Items** headings to sort the registrations

8. Click the link to view the registration

Links which include “REG ID: XXXXXXXXXX” are supplier registrations submitted through the Internal Supplier Registration by the Agency Submitter.
Manage Request Approval Navigation

1. Click the **NavBar** icon at the top of your screen:

![NavBar Icon](image)

2. Click the **Navigator** icon, and then click **FSCM** from the menu.

![Navigator Menu](image)

3. Click **Suppliers**

![Suppliers Menu](image)

4. Click **Supplier Registration**

![Supplier Registration Menu](image)
5. Click **Manage Request Approval**

6. Under the **Request Type** dropdown menu, select “Register New Suppliers”.
7. Under the **Initiated By** dropdown menu, select “Internal”.
8. Click **Search**. Pressing Enter on your keyboard will not search for results.
9. Click the **Registration ID** link to review the registration.
Reviewing an Internal Supplier Registration

1. On the Manage Request Approval page, click the Registration Details Link.

![Diagram showing a screenshot of the Manage Request Approval page with labels for various pieces of information:]

- **Uniquely identifies the registration.**
- **Supplier Name entered by Agency Submitter.**
- **Email address entered by Agency Submitter that will receive communications regarding the registration.**
- **Date the registration was started.**
- **Current status of the registration.**
- **Tax ID entered by the Agency Submitter.**
- **W-9 address entered by the Agency Submitter.**
- **The Agency Submitter was instructed to complete the UNSPSC if they have the information from the supplier. Otherwise, they should leave this field blank. If codes were entered, review for appropriate selection.**
Review Page

Review the entire registration in accordance with the instructions in this Manual before taking any action. Appendix B contains a list of **Dos and Don’ts** to help you ensure the documentation uploaded supports the information entered in the registration and that the registration is completed accurately. **If any entry field or documentation attached to the supplier registration is incomplete, incorrect, or illegitimate, it is the Agency Approver’s responsibility to deny the registration or request more information from the Agency Submitter and inform the Agency Submitter of all the reasons the registration is being denied or more information is being requested.**

2. To begin your review, scroll down to the second profile question and click on the **Attachment** link to open the uploaded W-9.

---

2. Click Attachment link to review W-9 uploaded
3. Review the uploaded W-9 to ensure the form is legible, not altered, and completed according to the IRS W-9 instructions. Appendix C and Appendix D of this manual contains general W-9 requirements and a summary instructional table to help you review the W-9 for accuracy.

**Your Supplier Registration Information**

4. On the **Review Page**, scroll up to the **Your Supplier Registration Information** section. Ensure the name entered in the **Company Name** field matches the supplier’s name on Line 1 of the W-9. The only difference should be that the Company Name must be entered in **ALL CAPS** on the registration.

<table>
<thead>
<tr>
<th>Registration ID</th>
<th>0000007475</th>
</tr>
</thead>
<tbody>
<tr>
<td>Entered on</td>
<td>08/17/2020</td>
</tr>
<tr>
<td>Status</td>
<td>Pending</td>
</tr>
<tr>
<td>Company Name</td>
<td>ABC COMPANY</td>
</tr>
<tr>
<td>SetID</td>
<td>32101</td>
</tr>
</tbody>
</table>

4. Must match Line 1 of W-9, ALL CAPS

**Identification & Classification**

5. Under **Identification & Classification**, ensure the TIN entered in the **Tax Identification Number** field matches the TIN provided in Part I of the W-9. The only difference should be that the TIN entered on the registration should not include dashes.

<table>
<thead>
<tr>
<th>Tax Identification Number</th>
<th>999999996</th>
</tr>
</thead>
</table>

5. Must match Part I of W-9, no dashes

6. It is important for the Agency Approver to ensure the tax ID provided in the registration is not already associated with a Supplier ID in Edison as the registration process is only for **new** suppliers. Follow the **New vs. Existing Suppliers** instructions later in this manual.
Primary Address

7. After you have determined that the supplier is not already in Edison by following the instructions in the **New vs. Existing Suppliers** instructions, scroll down to the **Primary Address** fields.

8. Ensure the address entered in the **Primary Address** fields was entered in **ALL CAPS**, matches the address provided on the W-9, and has been entered according to the Appendix E: Address Standards of this manual.

![Address Information Table](image-url)

8. Must match address on W-9, ALL CAPS
Profile Questions

9. Scroll up to the **Profile Questions** section to review all the Agency Submitter’s answers according to the requirements below.

   a. **First Profile Question:**

<table>
<thead>
<tr>
<th>Supplier Registration</th>
</tr>
</thead>
<tbody>
<tr>
<td>* Is the Taxpayer Identification Number provided above an Employer Identification Number (EIN) or a Social Security Number (SSN)? Click the magnifying glass and select “1” for EIN or select “2” for SSN.</td>
</tr>
</tbody>
</table>

   i. **Profile Question Requirements:** The Agency Submitter must have entered a “1” if the TIN entered on the W-9 and in the **Tax Identification Number** field in the registration is an Employer Identification Number (EIN). A “2” must be selected if the TIN entered on the W-9 and in the Tax Identification Number field is a Social Security Number (SSN). Example:

<table>
<thead>
<tr>
<th>Review Page</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Profile Questions</strong></td>
</tr>
<tr>
<td>* Is the Taxpayer Identification Number provided above an Employer Identification Number (EIN) or a Social Security Number (SSN)? Click the magnifying glass and select “1” for EIN or select “2” for SSN.</td>
</tr>
</tbody>
</table>

   b. **Second Profile Question:**

<table>
<thead>
<tr>
<th>Supplier Registration</th>
</tr>
</thead>
<tbody>
<tr>
<td>* Attach an IRS W-9 that the supplier has completed according to the IRS W-9 instructions. Only the current version of the IRS W-9 found at <a href="http://www.irs.gov">www.irs.gov</a>, that is hand-signed and dated within a year from the submission date, will be accepted. If an acceptable IRS W-9 is not submitted, your registration request may be denied.</td>
</tr>
</tbody>
</table>

   i. **Profile Question Requirements:** As reviewed earlier in this manual, the Agency submitter must have uploaded an IRS W-9 that is legible, not altered, and completed according to the IRS W-9 instructions and Appendix C and Appendix D of this manual.
c. **Third Profile Question:**

### Supplier Registration

If a remittance address (different from the address on the IRS W-9) will be entered on the Addresses page of this registration, attach documentation that clearly establishes the remittance address being added is associated with the W-9 supplier such as an invoice to or from the supplier, signed memo on company letterhead, etc. If appropriate supporting documentation is not submitted, your registration may be denied.

### Profile Question Requirements

i. **Profile Question Requirements:** If a remittance address (different from the address on the IRS W-9) is entered in this registration, the Agency Submitter must have uploaded documentation that clearly establishes the remittance address is associated with the W-9 supplier such as an invoice to or from the supplier, signed memo on company letterhead, etc. **Click the Attachment link to review the uploaded remittance address documentation according to Appendix B.**

To review if a remittance address was entered, scroll down through the **Review Page** until you see the **Remit To Address** fields. The remittance address must be entered in **ALL CAPS**, match the address on the remittance address supporting documentation, and entered according to Appendix E of this manual.
d. **Fourth Profile Question:**

Supplier Registration

* Click magnifying glass to select all of the 1099 categories that apply for this supplier for your agency. For additional examples of payment types, see the Classifying Payments for 1099 Reporting document located on the Division of Accounts, Accounting Job Aids, Supplier Information webpage. If none of these apply, contact Supplier Maintenance at 615-741-9745.

i. **Profile Question Requirements:** Review the accuracy of the Agency Submitter’s 1099 categories selected. After approval of the registration, Supplier Maintenance will enter all of the 1099 categories selected into the supplier’s file to be used in the future for payment processing and 1099 reporting, so it is critical the 1099 categories selected are accurate and appropriate for the supplier. Additional payment descriptions relative to the Edison 1099 category can be found in Appendix F. Example:

---

```
* Click magnifying glass to select all of the 1099 categories that apply for this supplier for your agency. For additional examples of payment types, see the Classifying Payments for 1099 Reporting document located on the Division of Accounts, Accounting Job Aids, Supplier Information webpage. If none of these apply, contact Supplier Maintenance at 615-741-9745.
```

---

e. **Fifth Profile Question:**

Supplier Registration

* Are any employees of this firm currently or previously employed by the state of Tennessee (within the past 6 months)?

i. **Profile Question Requirements:** Review the accuracy of the Agency Submitter’s “Yes” or “No” selection. Example:

---

```
* Are any employees of this firm currently or previously employed by the state of Tennessee (within the past 6 months)? No
```

---
g. **Sixth Profile Question:**

Supplier Registration

If answered “Yes” to the question above, please attach a list of the employees/owners including name, social security number, and position within the firm, including ownership interest. NOTE: All suppliers must comply with TCA 12-4-103 Bidding by State Employees Prohibited. It is hereby declared unlawful for any state official or employee to bid on, sell, or offer for sale, any merchandise, equipment or material, or similar commodity, to the State of Tennessee during tenure of such officials or employee’s office or employment, or for six (6) months thereafter, or to have any interest in the selling of the same to the state.

i. **Profile Question Requirements:** If the Agency Submitter selected “Yes” for the Profile Question above, an attachment must be uploaded to this Profile Question. Click the Attachment link to review the documentation, if uploaded.

The attachment must list information about the supplier or supplier’s employees that are current or former state employees within the last six months. The information must include the employees’:

- Name
- Social security number
- Position within the firm
- Ownership interest

**Example:**

<table>
<thead>
<tr>
<th></th>
<th>A</th>
<th>B</th>
<th>C</th>
<th>D</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Name</td>
<td>Social Security Number</td>
<td>Position within the firm</td>
<td>Ownership Interest</td>
</tr>
<tr>
<td>2</td>
<td>Peter Jones</td>
<td>111-11-1111</td>
<td>CEO</td>
<td>25%</td>
</tr>
</tbody>
</table>

Depending on what type of payments the current or former state employee will receive, additional documentation may be requested by Supplier Maintenance to ensure compliance.
h. The Agency Submitter was instructed to complete the additional **Profile Questions** below *if* they have the information from the supplier. If they do not have this information from the supplier, the Agency Submitter should leave these fields blank.

If the Agency Submitter provided answers to these questions, please review to help ensure appropriate responses were entered.

<table>
<thead>
<tr>
<th><strong>Date of Incorporation, if applicable.</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>State of Incorporation, if applicable.</strong></td>
</tr>
<tr>
<td><strong>Has a performance penalty ever been assessed against the organization or any of the principle owners?</strong></td>
</tr>
</tbody>
</table>
Contact Information

10. Under **Contact Information**, a Contact Name of “Internal” and Contact Type of “General” should show. The Contact Name is “Internal” as the registration was submitted by the agency and the agency cannot enter supplier contact information.

11. After you have reviewed the entire registration according to this manual, scroll down further on the **Review Page** and click **Return** to go back to the **Manage Request Approval** page.
12. Agency Submitter was instructed to complete the UNSPSC **Standard Industrial Codes** if they have the information from the supplier. Otherwise, they should leave this field blank. If codes were entered, review for appropriate selection.

12. **Review** codes entered for appropriate selection.
Manage Request Approval

13. After clicking Return, you will return to the Manage Request Approval screen. Scroll down until you see the Approve, Deny, and Request More Information buttons. You must select one of these actions depending on what your review found. It is recommended to meet with your agency leaders to determine criteria for denying or requesting more information for your agency’s registrations.

Each action is detailed below:

a. Approve: Clicking Approve will route the registration to Supplier Maintenance for review. **Do not Approve the registration and route the registration to Supplier Maintenance if the Agency Submitter did not accurately complete the Internal Supplier Registration per both the Agency Submitter and Agency Approver Manuals.**

If the registration has been completed according to both the Agency Submitter and Agency Approver Manuals, click “Approve” on the Manage Request Approval page then “OK” on the Approval action pop-up to route the registration to Supplier Maintenance for review.
b. **Deny**: Clicking **Deny** will terminate the registration process. If this action is selected, the Agency Submitter must complete a new registration for this supplier if needed.

The following pop-up will appear after clicking **Deny**. Enter “DENY” as the **Reason Code**. In the Comment field, enter your name or initials then type **ALL** of the reasons the registration is being denied. Make sure to identify yourself in the **Comment** field so the Agency Submitter knows who denied their registration as Supplier Maintenance can also deny a registration.

After you have completed both fields, click **OK**. The email address entered in the registration will be notified of the reason the supplier registration was denied.
c. **Request More Information**: Clicking *Request More Information* will route the registration back to the Agency Submitter for corrections to be made to the registration.

The following pop-up will appear after clicking *Request More Information*. Enter “RMI” as the *Reason Code*. In the *Comment* field, enter your name or initials then type **ALL** of the reasons you are requesting more information. Make sure to identify yourself in the *Comment* field so the Agency Submitter knows who is requesting more information as Supplier Maintenance can also request more information.

After you have completed both fields, click **OK**. The email address entered in the registration will be notified of the reason you are requesting more information. The Agency Submitter must make the necessary corrections to the registration then resubmit the registration for review again.

![Request More Information Pop-up]

13c. Enter “RMI”.
13c. Enter your name/initials and ALL of the reasons you are requesting more information
13c. Click OK to request more information

14. After you have selected an action, navigate back to the **Worklist** or the first *Manage Request Approval* screen to review more supplier registrations submitted by your agency’s Agency Submitter. See Appendix G for a list of queries your agency may find helpful for monitoring the progress of your agency’s registrations.
New vs. Existing Suppliers

Follow the instructions below to see if the supplier’s TIN is already in Edison:

1. Navigate to the **Review Suppliers** screen in Edison using the following navigation: FSCM>Suppliers>Supplier Information>Add/Update>Review Suppliers.
2. Enter the supplier’s tax ID in the Tax Identification Number field (no dashes) then click the Search button. Clicking “enter” on the keyboard will not search for results. For example:
   a. A supplier’s FEIN is 12-3456789. Enter 123456789 then click the Search button.
   b. A supplier’s SSN is 987-65-4321. Enter 987654321 then click the Search button.
3. If the tax ID is not already associated with a Supplier ID in Edison, text will appear that states, “There are no rows available that meet your search criteria”:

![Vendor Lookup Table](image)

4. If the tax ID is associated with a Supplier ID in Edison, rows of results will appear with the Supplier ID. **The registration must be denied according to the instructions in this manual.** In the denial message, it is important to inform the Agency Submitter of the Supplier ID to see if any updates to the supplier file are required.
Appendix A: Internal Supplier Registration Workflow

Agency Submitter
Agency Approver
Supplier Maintenance

Submit Internal Supplier Registration

Reviews submission

Approve

Registration terminated

Deny
Email sent to Submitter

Request More Information
Email sent to Submitter

Registration terminated

Deny
Email sent to Submitter

Request More Information
Email sent to Submitter

Supplier ID created

Email sent to Submitter

Email sent to Submitter

Email sent to Submitter

Email sent to Submitter

Email sent to Submitter
Appendix B: Dos and Don’ts

Identifying Information Page

✓ Do submit supplier registrations in a timely manner. Waiting to submit a registration right before a payment is due may result in delays in payment processing.
✓ Do ensure the Taxpayer ID Number (TIN) is not already associated with a Supplier ID in Edison
✓ Don’t enter a foreign supplier through this registration process. Send foreign supplier requests to Supplier.Maintenance@tn.gov and include in the Subject “FOREIGN”
✓ Do ensure the IRS W-9 is:
  o Legible and not altered
  o The current version of the IRS W-9
  o Completed according to the IRS W-9 instructions which includes only one TIN in Part I
  o Hand-signed
  o Dated within a year of the submission date
  o Uploaded
✓ Do ensure the Taxpayer ID Number entered in the registration matches the IRS W-9, except don’t enter dashes in the Taxpayer ID Number field
✓ Do ensure the Supplier Name entered in the registration matches Line 1 of the IRS W-9 uploaded, except the Supplier Name must be entered in ALL CAPS and don’t enter special characters, except a dash (-) and ampersand (&)
✓ Do ensure the correct number (1 or 2) for the TIN type is selected.
✓ Do ensure supporting documentation for the remittance address is uploaded if a remittance address is entered on the Addresses Page. The supporting document must:
  o Be an invoice to or from the supplier or hand-signed memo on company letterhead
  o Be legible and not altered
  o Contain the supplier’s Name or Doing Business As (DBA) name that appears on W-9
  o Contain a complete address
  o Dated within a year of the submission date
✓ Do ensure all of the 1099 categories needed for the supplier is checked to facilitate 1099 reporting
✓ Do ensure an attachment is uploaded if employees of the supplier are currently or were previously employed by the State of Tennessee within the last six months. Before submitting, be sure that all other necessary documentation supporting compliance of state rules and regulations is also uploaded.
✓ Don’t email Supplier.Maintenance@tn.gov inquiring on the status of your registration. See query information in the manual.
Addresses Page

- Do enter in ALL CAPS a complete and standardized address according to USPS. Standardized addresses consist of USPS standard abbreviations.
- Do enter the IRS W-9 address as the Primary Address
- Do enter the remittance address under Other Addresses, if needed
- Do ensure supporting documentation for the remittance address is uploaded on the Identifying Information page if a remittance address is entered
- Don't enter foreign addresses
Appendix C: General IRS W-9 Requirements

The supplier’s IRS W-9 uploaded during this supplier registration process must be the current version of the IRS W-9 found at www.irs.gov and must be completed according to the IRS Form W-9 instructions. The supplier registration will not be approved if the current version of the IRS W-9 is not completed according to the IRS Form W-9 instructions, is illegible, or has been altered. General IRS W-9 instructions are provided below.

a. **Line 1** of the W-9 is required and should be the name shown on the supplier’s income tax return.
b. **Line 2** is for the supplier’s LLC and/or DBA names, if applicable.
c. **Line 3** of the W-9 is required and only one box should be checked. When the “Other” box is checked, please ensure the supplier has entered their tax-exempt status such as government entity, 501c3, etc. For example:

d. **Lines 5 and 6** are required. This address will be entered as **Address ID 1** in Edison and is the address the Information Return (1099) will be mailed.
e. **Part I: Taxpayer Identification Number (TIN)** is required and only one Taxpayer Identification Number (TIN) should be provided. The TIN provided must match the name provided on **Line 1** to avoid backup withholding. If the name and TIN combination does not match IRS records, your registration will not be approved.
f. The supplier must hand-sign and date **Part II: Certification.** The submitted form must be dated within one year of the submission date to Supplier Maintenance.
Appendix D: 
Supplier Maintenance
IRS W-9 Summary Instructional Table

<table>
<thead>
<tr>
<th>Line 1</th>
<th>Line 2</th>
<th>Additional Line 3</th>
<th>Line 4</th>
<th>Lines 5 &amp; 6</th>
<th>Part I: Taxpayer Identification Number (TIN)</th>
<th>Part II: Certification</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.</td>
<td>Business name/ disregarded entity name</td>
<td>If you have a business name, trade name, DBA name, or disregarded entity name (LLC), you may enter it on line 2.</td>
<td>If you are exempt from backup withholding and/or FATCA reporting, enter in the appropriate space on line 4 any code(s) that may apply to you. See the IRS W-9 Instructions for a list of the Exempt Payee Codes.</td>
<td>Enter your address (number, street, and apartment or suite number).</td>
<td>Enter the individual’s SSN OR EIN. Do not enter both.</td>
<td>As allowed by the IRS W-9 instructions, the State of Tennessee requires a handwritten signature.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Enter the address (number, street, and apartment or suite number). This is where the requester of this Form W-9 will mail your information returns. This address differs from the one the requester already has on file, write NEW at the top.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Enter the corporation’s EIN.</td>
<td></td>
<td>As allowed by the IRS W-9 instructions, the State of Tennessee requires a handwritten signature.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Enter the corporation’s EIN.</td>
<td></td>
<td>As allowed by the IRS W-9 instructions, the State of Tennessee requires a handwritten signature.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Enter the partnership’s EIN.</td>
<td></td>
<td>As allowed by the IRS W-9 instructions, the State of Tennessee requires a handwritten signature.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Enter the entity’s EIN.</td>
<td></td>
<td>For usual revocable savings trust, enter the grantor-trustee’s SSN.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Enter the entity’s EIN.</td>
<td></td>
<td>For so-called trust account that is not a legal or valid trust under state law, enter the actual owner’s SSN.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Enter the SSN of the owner.</td>
<td></td>
<td>For any trust, enter the legal entity’s EIN.</td>
</tr>
</tbody>
</table>

When ONE of the following federal tax classifications below is checked in Line 3 of the IRS W-9...

| Individual/sole proprietor or single-member LLC (single-member LLC owned by an individual and disregarded for U.S. federal tax purposes) |

Individual: Generally, enter the name shown on your tax return. If you have changed your last name without informing the Social Security Administration (SSA) of the name change, enter your first name, the last name as shown on your social security card, and your new last name.

Sole proprietor or single-member LLC: Enter your individual name as shown on your 1040/1040A/1040EZ.

| C Corporation |

Enter the entity’s name as shown on the entity’s tax return

| S Corporation |

Enter the entity’s name as shown on the entity’s tax return

| Partnership |

Enter the entity’s name as shown on the entity’s tax return

| Trust/Estate |

Enter your name as shown on required U.S. federal tax documents on line 1. This name should match the name shown on the charter or other legal document creating the entity.

| Limited liability company (LLC treated as a partnership, corporation, or the owner is another LLC that is not disregarded for U.S. federal tax purposes) |

Enter the entity’s name as shown on the entity’s tax return

| Other |

Enter your name as shown on required U.S. federal tax documents. This name should match the name shown on the charter or other legal document creating the entity.

The State of Tennessee, Division of Accounts, does not provide tax, legal, or accounting advice. This material has been prepared for informational purposes only, and is not intended to provide, and should not be relied on for, tax, legal, or accounting advice. You should consult your own tax, legal, and accounting advisors before engaging in any transaction.

This table was created from the current IRS W-9 instructions found at www.irs.gov and is not inclusive of all instructions provided on the IRS W-9. This document is for informational purposes only and if any disparity or ambiguity exists between this document and the IRS Form W-9, IRS Form W-9 Instructions, or any other information provided by the IRS, the documents and information provided by the IRS control.
Appendix E: Address Standards

IRS W-9 Address Standards

The IRS W-9 must contain a complete address. For example, the street name must contain the street suffix such as “Drive”, “Street”, “Lane”, etc. However, some streets do not contain a street suffix, such as “Broadway”. Use the USPS Zip Code by Address tool (https://tools.usps.com/zip-code-lookup.htm?byaddress) to confirm if a street has a suffix. When using this tool, make sure to type in the exact address that was provided on the W-9 to get an accurate result. If the supplier’s W-9 does not contain a street suffix but the USPS Zip Code by Address tool shows the street does contain a street suffix, request a new W-9 from the supplier with the complete address.

USPS asks for dual addresses to be eliminated from mail. The State of Tennessee is adopting this preference and will not accept dual addresses on W-9s. If you receive a W-9 with a dual address, request a new W-9 from the supplier which contains only one delivery address.

Address abbreviations do not have to be used on the IRS W-9

Supporting Documentation Address Standards

Supporting documentation such as an invoice to or from the supplier or a memo on company letterhead does not have to contain a street suffix or an abbreviated address. If the address on the supporting documentation does not contain a street suffix, use the USPS Zip Code by Address tool (https://tools.usps.com/zip-code-lookup.htm?byaddress) to confirm if a street has a suffix. When using this tool, make sure to type in the exact address that was provided on the invoice or memo to get an accurate result. If the supplier’s invoice or memo does not contain a street suffix but the USPS Zip Code by Address tool shows the street does contain a street suffix, confirm with the supplier the complete remittance address and attach documentation to the registration which supports the complete address entered in the registration.

Dual addresses will be accepted on the invoice or memo, however, only one delivery address can be entered in the registration. Confirm with the supplier which delivery address they want entered and attach documentation to the registration which supports the delivery address entered in the registration.
Primary Address and Other Addresses Internal Supplier Registration Fields Standards

The Primary Address and Other Addresses entered during this registration process must be entered in ALL CAPS and be a complete and standardized address according to the United States Postal Service (USPS)*. A standardized address consists of using the USPS standard abbreviations as shown in USPS Publication 28 (https://pe.usps.com/text/pub28/welcome.htm). Examples of USPS address standards and abbreviations can be found on the next page.

Frequently used address standardization and abbreviation guidelines are listed below:

- **USPS Publication 28 Appendix B**: Two–Letter State and Possession Abbreviations
- **USPS Publication 28 Appendix C**: Street Abbreviations
  - C1: Street Suffix Abbreviations
  - C2: Secondary Unit Designators
- **USPS Publication 28 Appendix F**: Address Standardization — County, State, Local Highways

*Entry of the +4 digits of a zip code is not required during this registration process unless the supplier provides the +4 digits on the IRS W-9 and other supporting documentation.*
# Address Standards and Abbreviation Examples

<table>
<thead>
<tr>
<th>W-9 Street Address</th>
<th>Street Address Entered in Registration and Supplier Update Form</th>
<th>USPS Publication 28 Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>851 Allison Street</td>
<td>851 ALLISON ST</td>
<td>Appendix C &gt; C1 Street Suffix Abbreviations</td>
</tr>
<tr>
<td>123 Church</td>
<td>Use USPS Zip Code by Address tool to confirm street suffix. For this example, the supplier sent a new W-9 showing the street suffix is “Street”: 123 CHURCH ST</td>
<td>2 Postal Addressing Standards</td>
</tr>
<tr>
<td>6521 CO 33</td>
<td>6521 COUNTY ROAD 33</td>
<td>Appendix F</td>
</tr>
<tr>
<td>95 HWY 64</td>
<td>95 HIGHWAY 64</td>
<td>Appendix F</td>
</tr>
<tr>
<td>256 Princeton Drive Apartment 125 B</td>
<td>256 PRINCETON DR APT 125B (If the street address and apartment number cannot fit on one line, the apartment number must be entered in the line above the street address)</td>
<td>Appendix C &gt; C2 Secondary Unit Designators and Appendix I &gt; I2 Address Formats &gt; I2 Apartment Buildings and Condominiums</td>
</tr>
<tr>
<td>Post Office Box 125</td>
<td>PO BOX 125</td>
<td>2 Postal Addressing Standards &gt; 28 Post Office Box Addresses</td>
</tr>
<tr>
<td>651 Crown Drive, PO Box 3</td>
<td>Get a new W-9 from supplier showing only one complete address. New W-9 shows: PO BOX 3</td>
<td>2 Postal Addressing Standards &gt; 21 General &gt; 215 Dual Addresses (State of Tennessee is eliminating the use of dual addresses)</td>
</tr>
</tbody>
</table>
Appendix F:
Edison Locations for 1099 Reporting

<table>
<thead>
<tr>
<th>Location Type</th>
<th>Description of Payment</th>
</tr>
</thead>
<tbody>
<tr>
<td>CAT1</td>
<td><strong>Rent</strong> of real property and equipment, such as buildings, direct-billed hotel rooms,</td>
</tr>
<tr>
<td></td>
<td>land, machinery, office space, warehouses, etc. <em>Excludes</em> rent paid to real estate</td>
</tr>
<tr>
<td></td>
<td>agents or property managers.</td>
</tr>
<tr>
<td>CAT3</td>
<td><strong>Other Income</strong> such as awards, incentives, prizes, etc. <em>Excludes</em> compensation for</td>
</tr>
<tr>
<td></td>
<td>services.</td>
</tr>
<tr>
<td>CAT6</td>
<td><strong>Medical and Health Care Payments</strong> such as ambulance, autopsy, dental, laboratory,</td>
</tr>
<tr>
<td></td>
<td>medical, psychological, veterinary services, etc.</td>
</tr>
<tr>
<td>CAT7</td>
<td><strong>Non-Employee Compensation</strong> services such as advertising, attorney’s fees, child</td>
</tr>
<tr>
<td></td>
<td>care, construction, consulting, court reporting, janitorial, repairs (includes parts</td>
</tr>
<tr>
<td></td>
<td>and materials), security, speaker fees, temporary staffing, training, etc.</td>
</tr>
<tr>
<td>CAT14</td>
<td><strong>Gross Proceeds to an Attorney</strong> (settlements) &amp; Second Injury Fund Attorneys</td>
</tr>
<tr>
<td>CATG</td>
<td><strong>Taxable Grants</strong> (reportable unless exemption in grant award)</td>
</tr>
<tr>
<td>MAIN</td>
<td><strong>Non-Reportable</strong> - Products, travel, utilities, membership dues</td>
</tr>
<tr>
<td>CATI</td>
<td>Interest</td>
</tr>
<tr>
<td>CATR</td>
<td>Employee Death Benefits</td>
</tr>
</tbody>
</table>
Appendix G: Queries

There are queries in Edison to assist agencies with tracking the progress of the supplier registrations created by their agency. The following is the navigation to the Query Viewer screen in Edison: Navigator > FSCM > Reporting Tools > Query > Query Viewer.

1. **TN_INTSUP_AG_REG_DRAFT_STATUS** – This query displays the registrations that are in a Save For Later status for a specific Business Unit. Example:

**Prompts:**

![Business Unit 32701 View Results]

**Results:**

<table>
<thead>
<tr>
<th>BU</th>
<th>Registration ID</th>
<th>Supplier Name</th>
<th>Last four digits of TIN</th>
<th>Registration ID Created by</th>
<th>Email Address of Submitter</th>
<th>Date/Time Registration Created</th>
<th>Date/Time Reg Last Modified</th>
</tr>
</thead>
<tbody>
<tr>
<td>32701</td>
<td>0000008940</td>
<td>testing testing</td>
<td>4952 samad0103001</td>
<td><a href="mailto:sam.smith@tn.gov">sam.smith@tn.gov</a></td>
<td>7/17/2020 23:17</td>
<td>7/17/2020 23:17</td>
<td></td>
</tr>
<tr>
<td>32701</td>
<td>0000008936</td>
<td>sup 123 123</td>
<td>4999 matt1008001</td>
<td><a href="mailto:matt.jackson@tn.gov">matt.jackson@tn.gov</a></td>
<td>7/17/2020 10:14</td>
<td>7/17/2020 11:57</td>
<td></td>
</tr>
</tbody>
</table>

2. **TN_INT_SUP_REG_AGENCY_PENDING** – This query displays the registrations that are in a Pending Approval status and awaiting agency approval for a specific date range. The date range is querying on the date the registration was submitted by the Agency Submitter. Example:

**Prompts:**

![Date From: 07/01/2020   Date To: 07/28/2020     Business Unit: 32901 View Results]

**Results:**

<table>
<thead>
<tr>
<th>BU</th>
<th>Registration ID</th>
<th>Supplier Name</th>
<th>Last four digits of TIN</th>
<th>Registration Submitted By</th>
<th>Email Address of Submitter</th>
<th>Date/Time Agency Submitted Reg</th>
</tr>
</thead>
<tbody>
<tr>
<td>32901</td>
<td>0000008928</td>
<td>King Enterprise</td>
<td>8217 saraw0805001</td>
<td><a href="mailto:sarah.johnson@tn.gov">sarah.johnson@tn.gov</a></td>
<td>7/16/2020 9:14</td>
<td></td>
</tr>
<tr>
<td>32901</td>
<td>0000008929</td>
<td>Muse Makings</td>
<td>2179 saraw0805001</td>
<td><a href="mailto:sarah.johnson@tn.gov">sarah.johnson@tn.gov</a></td>
<td>7/16/2020 9:17</td>
<td></td>
</tr>
<tr>
<td>32901</td>
<td>0000008934</td>
<td>JTM Enterprise</td>
<td>5845 saraw0805001</td>
<td><a href="mailto:sarah.johnson@tn.gov">sarah.johnson@tn.gov</a></td>
<td>7/16/2020 15:02</td>
<td></td>
</tr>
</tbody>
</table>
3. **TN_INT_SUP_AG_REG_STATUS** – This query displays the status of registrations after the Agency Approver has taken action on the registration for a specific Business Unit for a date range. The date range is querying on the date the registration was Approved by the Agency Approver. Example:

**Prompts:**

![Date From: 07/01/2020, Date To: 07/24/2020, Business Unit: 32701, View Results]

**Results:**

<table>
<thead>
<tr>
<th>BU</th>
<th>Registration ID</th>
<th>Supplier Name</th>
<th>Last four digits of TIN</th>
<th>Registration Submitted By</th>
<th>Email Address of Submitter</th>
<th>Date/Time Agency Submitted Reg</th>
<th>Agency Approver</th>
<th>Action taken by Approver</th>
<th>Last Modified Date/Time</th>
<th>Supplier ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>32701</td>
<td>0000008925</td>
<td>Hulls LLC</td>
<td>8962</td>
<td>stepa063000</td>
<td><a href="mailto:stephen.green@tn.gov">stephen.green@tn.gov</a></td>
<td>7/16/2020 9:00</td>
<td>jayce0226001</td>
<td>Approved</td>
<td>7/16/2020 11:22</td>
<td>0000243850</td>
</tr>
<tr>
<td>32701</td>
<td>0000008925</td>
<td>Hulls LLC</td>
<td>8962</td>
<td>stepa063000</td>
<td><a href="mailto:stephen.green@tn.gov">stephen.green@tn.gov</a></td>
<td>7/16/2020 9:00</td>
<td>benja1008001</td>
<td>Approved</td>
<td>7/16/2020 11:30</td>
<td>0000243850</td>
</tr>
<tr>
<td>32701</td>
<td>0000008930</td>
<td>Johnson Inc</td>
<td>6201</td>
<td>stepa063000</td>
<td><a href="mailto:stephen.green@tn.gov">stephen.green@tn.gov</a></td>
<td>7/16/2020 14:47</td>
<td>bobb0401001</td>
<td>Approved</td>
<td>7/17/2020 7:37</td>
<td>0000243850</td>
</tr>
<tr>
<td>32701</td>
<td>0000008930</td>
<td>Johnson Inc</td>
<td>6201</td>
<td>stepa063000</td>
<td><a href="mailto:stephen.green@tn.gov">stephen.green@tn.gov</a></td>
<td>7/16/2020 14:47</td>
<td>benja1008001</td>
<td>Denied</td>
<td>7/17/2020 7:42</td>
<td>0000243852</td>
</tr>
<tr>
<td>32701</td>
<td>0000008931</td>
<td>Williams Way LLC</td>
<td>4321</td>
<td>stepa063000</td>
<td><a href="mailto:stephen.green@tn.gov">stephen.green@tn.gov</a></td>
<td>7/16/2020 14:52</td>
<td>bobb0401001</td>
<td>Approved</td>
<td>7/17/2020 7:43</td>
<td>0000243852</td>
</tr>
<tr>
<td>32701</td>
<td>0000008931</td>
<td>Williams Way LLC</td>
<td>4321</td>
<td>stepa063000</td>
<td><a href="mailto:stephen.green@tn.gov">stephen.green@tn.gov</a></td>
<td>7/16/2020 14:52</td>
<td>benja1008001</td>
<td>Approved</td>
<td>7/17/2020 7:43</td>
<td>0000243852</td>
</tr>
</tbody>
</table>

Query notes: Jayce0226001 and bobb0401001 are the Agency Approvers. Benja1008001 is the Supplier Maintenance Approver. The “Action taken by Approver” column reflects the last action performed by either the Agency Approver or Supplier Maintenance.

4. **TN_INT_SUP_AG_REG_ID_BASED** – This query displays the status of a range of Registration IDs after the Agency Approver has taken action on the registration for a specific Business Unit. Example:

**Prompts:**

![Business Unit: 32701, Registration ID From: 0000008930, Registration ID To: 0000008931, View Results]

**Results:**

<table>
<thead>
<tr>
<th>BU</th>
<th>Registration ID</th>
<th>Supplier Name</th>
<th>Last four digits of TIN</th>
<th>Registration Submitted By</th>
<th>Email Address of Submitter</th>
<th>Date/Time Agency Submitted Reg</th>
<th>Approver</th>
<th>Action taken by Approver</th>
<th>Last Modified Date/Time</th>
<th>Supplier ID</th>
</tr>
</thead>
<tbody>
<tr>
<td>32701</td>
<td>0000008930</td>
<td>Johnson Inc</td>
<td>6201</td>
<td>stepa063000</td>
<td><a href="mailto:stephen.green@tn.gov">stephen.green@tn.gov</a></td>
<td>7/16/2020 14:47</td>
<td>bobb0401001</td>
<td>Approved</td>
<td>7/17/2020 7:37</td>
<td>0000243850</td>
</tr>
<tr>
<td>32701</td>
<td>0000008930</td>
<td>Johnson Inc</td>
<td>6201</td>
<td>stepa063000</td>
<td><a href="mailto:stephen.green@tn.gov">stephen.green@tn.gov</a></td>
<td>7/16/2020 14:47</td>
<td>benja1008001</td>
<td>Denied</td>
<td>7/17/2020 7:42</td>
<td>0000243852</td>
</tr>
</tbody>
</table>

Query notes: Bobb0401001 is the Agency Approver. Benja1008001 is the Supplier Maintenance Approver. The “Action taken by Approver” column reflects the last action performed by either the Agency Approver or Supplier Maintenance.