

New Vendors Requiring a W9

If you are unable to find a vendor in our system a W9 request must be sent out to that vendor. A payment cannot be processed for this vendor until the W9 is received in the business office.

A copy of a W9 request form can be found on the Business Office website under forms; titled FEIN Request Letter and IRS Form W-9.

<http://www.uwsuper.edu/business/forms/index.cfm>

The screenshot displays the Business and Financial Services website for the University of Wisconsin-Superior. The page features a navigation menu with categories like 'FUTURE STUDENTS', 'CURRENT STUDENTS', 'FACULTY AND STAFF', 'ALUMNI AND FRIENDS', and 'PARENTS'. A search bar is located at the top left. The main content area is titled 'Forms' and lists various documents available for download, each with a PDF icon. The 'FEIN Request Letter and IRS Form W-9' form is highlighted with a red circle. Below the list of forms, there is an 'Instructions' section with links to specific guidelines.

Financial Services - UW-Superior

UNIVERSITY OF WISCONSIN
Superior
Wisconsin's Leading Public Liberal Arts College

FUTURE STUDENTS | CURRENT STUDENTS | FACULTY AND STAFF | ALUMNI AND FRIENDS | PARENTS

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Business and Financial Services

- News and Events
- Staff Directory
- Chart of Cost Centers
- Accounting Codes/Appropriation Structure
- Fiscal Year Financial Reports
- Capital Inventory and Surplus Information
- Forms**
- FAQs
- Site Map and Search

Policies and Procedures

Travel Office

Purchasing Office

Related Departments

Business and Financial Services
University of Wisconsin-Superior
Old Main 202, 206 and 208
Belknap and Catlin
P.O. Box 2000
Superior, WI 54880
ph. 715-394-8350
hours: 7:45am-4:30pm M-F
ilaughli@uwsuper.edu

Search the Business and Financial Services Website:

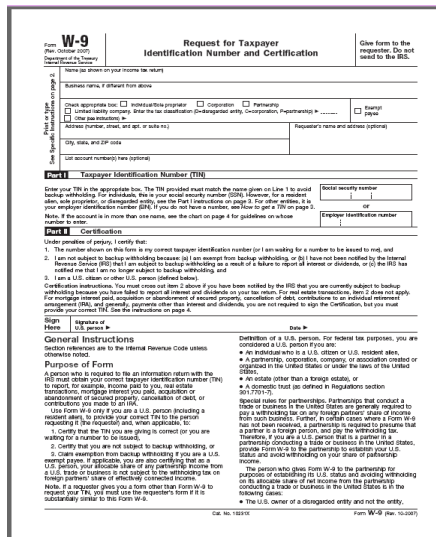
Forms

[UW-Superior > Business > Forms](#)

- [Academic Support Service Agreement](#)
- [Approved Alternate Food Suppliers List](#)
- [Budget Transfer Form](#)
- [Car Travel Calculator](#)
- [Catered Food Service Payment Request Form](#)
- [Chargeback Instructions](#)
- [Cost Center Request Form](#)
- [Damaged Goods Form](#)
- [Department Deposit Form](#)
- [Driver Authorization Form](#)
- [Entertainment Contract](#)
- [Equipment Service Report](#)
- [FEIN Request Letter and IRS Form W-9](#)**
- [Group Travel Meal Receipt](#)
- [Invoice Request Form](#)
- [Lab Fee/Special Course Fee Request Form](#)
- [Passenger Authorization Form](#)
- [Payment to Individual Report Form \(PIR\)](#)
- [Petty Cash Log](#)
- [Petty Cash Usage Agreement](#)
- [Pro Card Application Form](#)
- [Pro Card Site Manager Agreement Form](#)
- [Purchase Requisition](#)
- [Starting Cash Agreement](#)
- [Surplus Property Declaration Form](#)
- [Transfer of Revenue/Expense and Interdepartmental Chargebacks Form](#)
- [Travel Advance Request Form](#)
- [Travel Expense Report \(TER\)](#)
- [Trip Planning](#)

Instructions

- [Instructions for Transfer of Expense or Revenue](#)
- [Instructions for Interdepartmental Chargeback](#)
- [Instructions for Travel Expense Report and TER Procedures](#)



To expedite the process of receiving a completed W9 from a vendor these contact method should be taken in the following order:

- 1) Phone: Call the vendor to inquire if they have a W9 on file that they could e-mail or fax a copy to you. Many large businesses will have a W9 on file.
- 2) Email: If the vendor does not have their own copy of a W9 form on hand you may save a copy of the W9 form and attach it to an e-mail to the vendor. Or, you can email the link to the vendor, have them complete the W9 and return it as soon as possible.
<http://www.uwsuper.edu/business/forms/loader.cfm?csModule=security/getfile&PageID=1061734>
- 3) Fax: If steps 1 & 2 are unsuccessful print off a copy of page 1 & 2 of the document; place the vendors name in the upper left hand corner of page 1 and fax this to the vendor. Have the vendor fax a completed copy back as soon as possible.
- 4) Mail: The following will outline the necessary steps to take when mailing a W9 to a vendor.

On Page 1 type the name and address of the vendor in the top left hand corner. (This is a pdf file that will allow you to type the address in, print it out, but not save your changes.)



9/9/2010

Home Hardware
555 Blank Street W
Madison, WI 55555

Taxpayer Identification Request

In order for the University of Wisconsin-Superior to comply with Internal Revenue Service regulations, we are asking that you please complete the enclosed W-9 Form. Failure to provide this information may result in delayed payments or backup withholding. This request is being made at the direction of the University Controller in order that the University may maintain its vendor file with current information and be in compliance with IRS regulations.

Please return or fax the W-9 Form within ten (10) days of receipt, even if you are exempt from backup withholding. Please make sure that the form is complete and correct. Failure to respond in a timely manner may subject you to a 31% withholding on each payment, or require the University to withhold payment of outstanding invoices until this information is received.

Thank you for your cooperation. Please return the completed form to:


**University of Wisconsin – Superior
Attn: Purchasing Office
Belknap & Catlin
PO Box 2000
Superior, WI 54880
Fax: (715) 394-8107**

*If you have any questions, please contact Rob Waksdahl, Purchasing Agent, Senior.
Phone: (715) 394-8383
Email: rwaksdah@uwsuper.edu*

Enclosure

Once you have entered the address on page 1; print pages 1 & 2 only. It is not necessary to print page 3 on.

Print:


 UNIVERSITY of WISCONSIN
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 Wisconsin's Public Liberal Arts College

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 Belknap & Catlin
 PO Box 2000
 Superior, WI 54880
 Fax: (715) 394-8107

*If you have any questions, please contact Rob Waksdahl, Purchasing Agent, Senior.
 Phone: (715) 394-8383
 Email: rwaksdah@uwsuper.edu*

Enclosure

W-9
 Request for Taxpayer
 Identification Number and Certification

Form (Rev. October 2009)
 Department of the Treasury
 Internal Revenue Service

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

Name (as shown on your income tax return)

Business name, if different from above

Check appropriate box: Individual/sole proprietor Corporation Partnership Limited liability company. Enter the tax classification (e.g., disregarded entity, C-corporation, S-partnership) Exempt payee Other (see instructions)

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

City, state, and ZIP code

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 your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see how to get a TIN on page 5. Note: If the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.

social security number

Employer identification number

Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below).

Certification instructions. You must check out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contribution to an individual retirement arrangement (IRA), and generally payments other than interest and dividends, you are not required to sign the Certification, but you must provide your correct TIN. See the instructions on page 4.

Sign Here Signature of U.S. person Date

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Purpose of Form

A person who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:

1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued).
2. Certify that you are not subject to backup withholding, or
3. claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' shares of effectively connected income.

Note. If 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.

Definition of a U.S. person. For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien,
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States,
- An estate (other than a foreign estate), or
- A domestic trust (as defined in Regulations section 301.7701-7).

Special rules for partnerships. Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax on any foreign partners' share of income from such business. Further, in certain cases where a Form W-9 has not been received, a partnership is required to presume that a partner is a foreign partner, and pay the withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid withholding on your share of partnership income.

The person who gives Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States is in the following cases:

- The U.S. owner of a disregarded entity and not the entity,

Oct. No. 1003XX Form W-9 (Rev. 10-2009)

Place these documents into a window envelope and mail out to the vendor. It is helpful to contact the vendor to inform them of the importance of returning the W9 to your department or to the business office as soon as possible.

If a W9 is received in your department for a vendor that you will be preparing a Purchase Requisition for please attach the W9 to the Purchase requisition to be sent to the Business Office.